



# Survey on simplified rights models

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## Introduction

This survey was conducted in September and October 2016 and a total of 17 BAPLA members responded. This represents 11% of the membership. Although the total of responses was disappointing, the results do nevertheless give a clear picture of trends in this area. The main one is for clients to demand a simplification of rights and to expect wider rights for lower fees, and for publishing clients to want rights-managed images to be available with similar rights to royalty-free images. It was also noted that royalty free is now increasingly influencing rights-managed pricing. Of the members who responded, only 1 offered microstock, 3 offered royalty-free, 7 offered broad rights for educational publishing and 10 offered rights-managed rights bundles (with two thirds of them saying that this was a growth area).

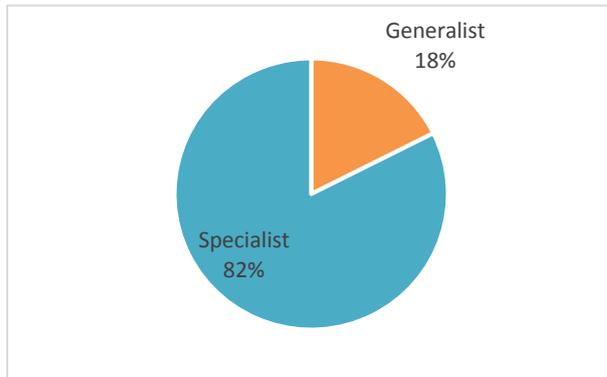
I would like to thank all the members of the BAPLA Rights Group who helped create and analyse this survey and all those members who completed it, and Susanne Kittlinger and Grace Allwood in the BAPLA office for their admin support. Any feedback from members to the survey or suggestions for future areas of investigation will be much appreciated and should be sent [via email](#) to the BAPLA office.

Tim Harris, Chair BAPLA Rights Group 25<sup>th</sup> January 2017

# General questions

## 1) What type of agency/library are you?

17 members answered this question. 3 are Generalist and 14 Specialist.

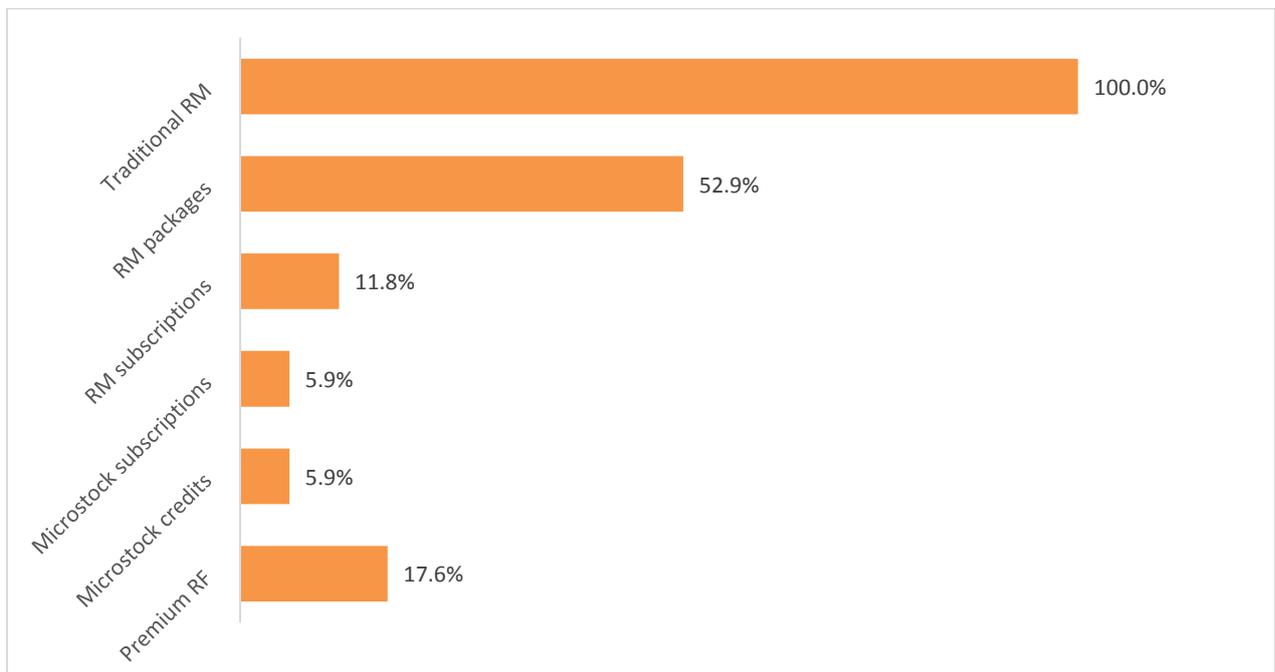


## 2) How many staff do you have?

17 members answered this question. 3 employ between 100 and 120 staff. Another 3 employ between 60 and 65 staff and 10 members employ between 1 and 15 staff.

## 3) What rights models do you offer?

17 members answered this question.



## 4) What licensing trends have you noticed in these areas?

15 members answered this question.

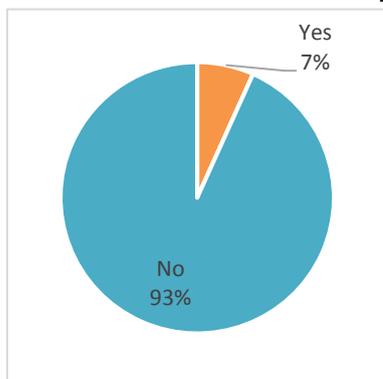
Overall responses suggested that clients were looking for a simplification in rights and

requested wider rights with lower fees. Three members also added RF was influencing RM pricing in terms of the rights clients expected.

## Royalty free

### 5) Do you offer Microstock?

15 members answered this question. 1 said Yes and 14 No.



### 6) How many file sizes do you offer for Microstock?

One member answered five.

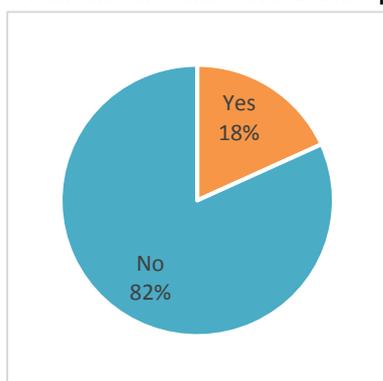
### 7) What is the price of single image per size?

One member answered this question:

- £7-£20 regardless of size

### 8) Do you offer volume subscription?

11 members answered this question. Two said Yes and nine No.



### 9) If yes, please supply details.

Two members answered this question. One said bespoke subscriptions with specific rights were available. The other said multiple offers were available ranging from 10 images over 1 month to 750 images per month over 12 months.

**10) Do you have one premium RF offering or multiple offerings?**

Three members answered this question. One said they had a direct premium RF/broad rights offering and a regular RF offering via agents.

One said multiple a la carte and subscription offerings were available, and the third said they didn't have an offering at present but were planning to one launch soon.

**11) Do you set pricing or do you allow photographer or source to set pricing?**

Five members answered this question. One said they set their own pricing.

One said photographers used their pricing but agencies could set their own pricing

**12) Please specify size of file offered (in pixels, MB or both) and price.**

Three members answered this question.

XS:

- 0.5 MB £39

S:

- 1.3MB £60

- 1000 pixels £150

- 72dpi £250

M:

- 6MB £140

- 2000 pixels £250

L:

- 23MB £165

- 4000 pixels £500

- 300dpi £485

XL:

- 75MB £255

**13) What are your limits/licence restrictions for RF use?**

Four members answered this question:

- 10 seats

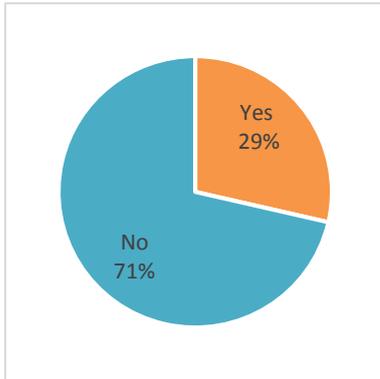
- 500,000 print run, no digital templates, no items for resale, no print on demand products

- only use by company

- No distribution by mobile devices or any device that could allow a third party to access and download. No use within trademark logo or similar. Images may not be made available to be downloaded and used independently by third parties. No pornographic, defamatory use.

**14) Does your RF licence permit merchandising use?**

Seven members answered this question. Two said Yes and five No.

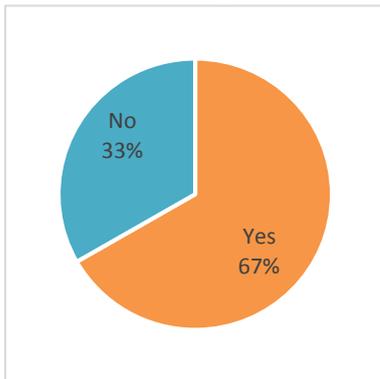


**15) If yes, please provide details.**

Two members answered this question. One said for sale items were included with merchandising use. The other said only the license upgrade, typically at 3-6 x base price.

**16) Are users in a company limited?**

Six members responded to this question. Four said Yes and two No.

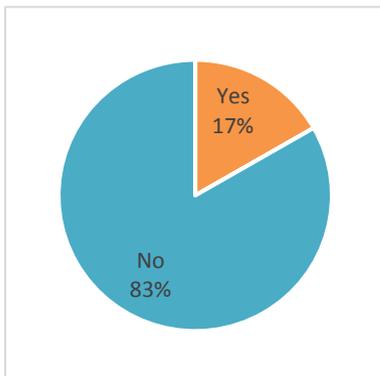


**17) If yes, please provide details.**

Four members stated they limited the number of users in a company to ten.

**18) Is there a print run limit?**

Six members answered this question. One said Yes and five No.



**19) If yes, please provide details:**

One member said they limited the print run to 500,000.

**20) Can you describe how your RF offering or pricing has changed in the last couple of years?**

Three members answered this question. One member said their RF offering hadn't changed except for bespoke deals.

One said simplified rights, more subscription offerings at different price points.

One said they were launching a premium offering with stronger images and higher prices.

**21) Please describe what kind of discount / subscription / bundle offering you have in RF.**

Three members answered this question. One member said they offered discounts on a case by case basis.

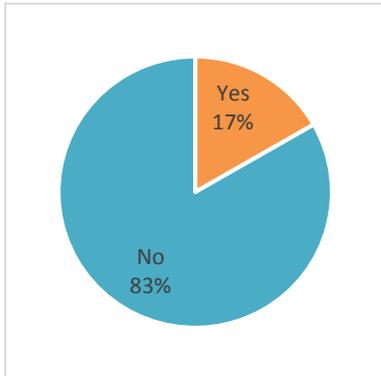
One said they had multiple offers and another said they would be offering volume discounts in the future.

**22) Have you noticed any recent trends in RF licensing? If so, please describe.**

Two members answered this question. One said there was growth in demand, and the other said creative and educational publishing clients were asking increasingly for RF.

**23) Do you offer indemnification as part of your premium RF pricing?**

Six members answered this question. One said Yes and five No.



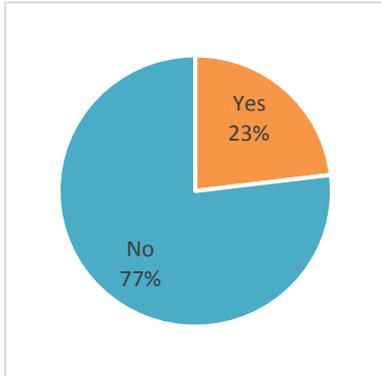
**24) If yes, what is it capped at?**

One member answered \$10,000.

# Subscriptions

## 25) Do you offer subscriptions in RM?

13 members answered this question. 3 said Yes and 10 No.

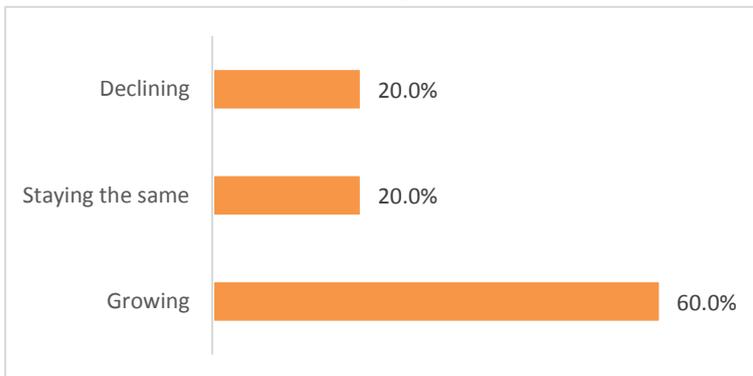


## 26) If yes, is the subscription available to buy online or only through an account manager?

Three members answered this question, all said subscriptions were available through an account manager.

## 27) Is this area declining, staying the same or growing?

Five members answered this question.



## 28) What percentage of your sales were from subscriptions in your last complete financial year?

Three members answered this question. Estimates were 0%, 1% and less than 5%. The same estimates were supplied for the previous two years.

## 29) In which markets do you offer subscriptions?

Three members answered this question. They all said they offered subscriptions in the editorial market and the web-online market. Two of them stated they offered subscriptions in the ad and promo market.

**30) What is the minimum number of images permitted?**

Three members answered this question. Two said ten was the minimum number of images permitted and one said 350 per year.

**31) What is the minimum spend per year permitted?**

Three members answered this question. One said the minimum permitted spend per year was £4,000. One said £5,000 and the third said it varied.

**32) Are subscriptions paid monthly, annually or other?**

Three members answered this question. One said subscriptions were paid monthly. One said monthly, quarterly or annually and the third said whatever the client nee

**33) What is the minimum subscription period?**

Three members answered this question. Two said the minimum subscription period was one year and one said one month.

**34) Please describe the rights included within your typical subscriptions.**

Three members answered this question. Two stated that rights varied, though they were typically based on standard commercial or editorial licenses. One said the rights included were web and social media, with some editorial or promotion.

**35) Does the subscription have a single price point or multiple price points?**

Four members answered this question. Two said they had multiple price points, with one of them giving further details (1/4 page £55 up to full page £100 for print and digital world rights). One said it varied as subscriptions were bespoke. One said they had a single price point, but certain images or uses (e.g. video) counted as more than one unit.

**36) Is all content included or are some collections excluded?**

Three members answered this question. Two include all collections and one excludes the collection if the collections requests it.

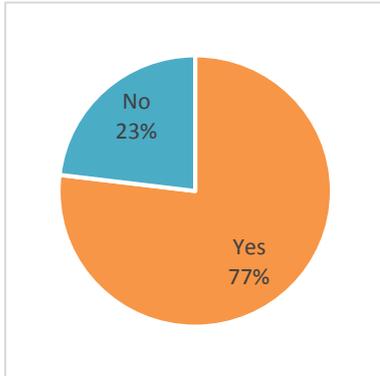
**37) Have you noticed any recent trends in this area, or has your subscription offering changed?**

One member noted that there was more interest but it was difficult to convert that to sales.

# Rights bundles

## 38) Do you offer RM rights bundles?

13 members answered this question. 10 said Yes and 3 No.



## 39) If yes, what kind of RM rights bundles do you offer?

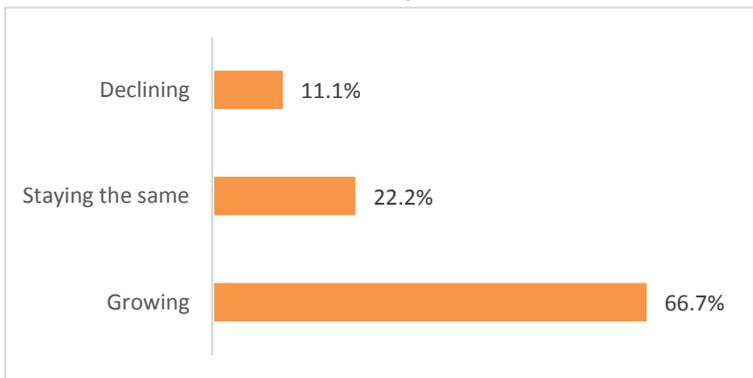
Nine members answered this question, with five stating that they licensed bundles on a case by case basis. Of the examples given there seemed to be an even split between editorial and commercial usages, with educational bundles being the most prevalent in editorial, and above and below the line marketing the most common in commercial. Bundles were also tailored for production houses, press and advertising. One respondent considers bundles for the larger image orders.

## 40) Are these available online or only through an account manager?

Nine members answered this question. Seven said they only offered rights bundles through an account manager, one offers bundles online and one offers both.

## 41) Is this area declining, staying the same or growing?

Nine members answered this question.



## 42) What percentage of your sales were from rights bundles in your last complete financial year?

Eight members answered this question. Estimates were 1%, 2%, 10% and 15%. Two said it was too early to tell and another two said their system didn't record this information.

#### **43) The previous year?**

Two members answered this question. One said 1%, the other 5%.

#### **44) The year before that?**

Two members answered this question. One said 1%, the other 15%.

#### **45) Please give details of up to 5 rights bundles you offer and include medium/rights, time period, any other limits and price.**

Five members answered this question.

- RM 5 years, promotional/commercial, one website, one placement, multiples of 5 images to 50 images ranging from £40-£20 per image
- RM 1-3 years, promotional/commercial, European website, multiples of 3 images to 10+ images ranging from £40-£20 per image
- RM 1-3 years, promotional/commercial, US website, multiples of 3 images to 10+ images ranging from £40-£20 per image
- RM 1 week, promotional/retail, one website, one placement, multiples of 5 images to 50 images, ranging from £30-£10 per image
- RM 1 year, editorial, one website, world-wide, one placement, multiples of 20 images to 100 images, ranging from \$30-\$20 per image
- online marketing 1 year worldwide £350
- online marketing & advertising 1 year worldwide £500
- online marketing and ads plus press ads worldwide 1 year £1000
- books and magazines inside in print and on-line for the life of the product up to ½ page £45
- books and magazines inside in print and on-line for the life of the product up to full page £90
- below line buyout 1 year one territory £1000
- above and below line buyout 1 year 1 territory £2000

#### **46) Which industry or areas are requesting this the most?**

Eight members answered this question. Educational and commercial both were mentioned three times, while online, TV and conservation clients were all mentioned once.

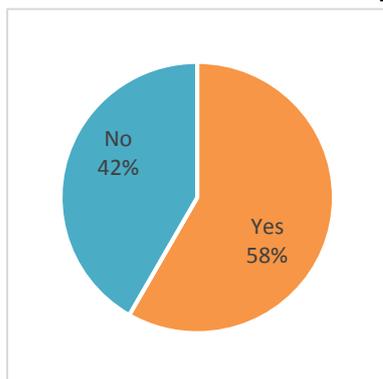
#### 47) What trends have you noticed in this area?

Six members answered this question. They indicated a general trend for more rights at lower rates and RF as the preferred licensing model.

## Broad rights in educational publishing

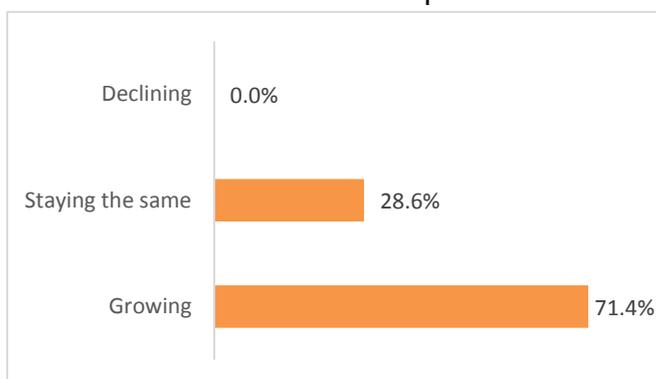
#### 48) Do you offer a broad rights package aimed specifically at educational publishers?

12 members answered this question. Seven said Yes and five No.



#### 49) Is this area declining, staying the same or growing?

Seven members answered this question.



#### 50) What percentage of your sales were from broad educational rights in your last complete financial year?

Four members answered this question. Estimates were 2%, 4% 10% and 50% plus. It was not possible to work out a meaningful average.

#### 51) The previous year?

Three members answered this question. Percentages given were between 0% and 5% with the average at 3%.

#### 52) The year before that?

Two members answered this question. One said 0% and the other 4%, so the average was 2%.

**53) Do you offer broad rights bundles to industries other than educational?**

Eight members answered this question. Four answered Yes and three answered No. The other respondent indicated that they would discuss such bundles but didn't offer them upfront.

The client groups mentioned were exhibitions/museums, production companies, TV/film, advertising and corporate.

**54) Please provide details of broad educational rights bundles including time period, other restrictions and prices.**

Seven members answered this question. One is considering such an offering. Of the others, five offered a 10 year package and the other a 20 year package, usually for world rights all languages but one offered a bundle for more restricted territories. Some members did not place a print-run limit while others had a print-run limit or a range of prices for different print-runs. The most typical rights granted were all print and digital editions within the same product family, including related products. Only one member quoted a price, which was in the range of £100 - £120 per image for 10 years world rights all languages.

**55) Does your educational rights bundle include one title, one programme or all titles?**

Eight members answered this question. Of these, two included one title only, one included one title and programme, three included one programme and two included all titles.

**56) What is the price for inside use?**

Six members answered this question. One stated that they used custom prices. The others stated prices between £100 and £465 for world rights all languages and one client stated between £85 and £130 for more limited Australia/New Zealand rights. One said that such fees were usually for US clients at between \$200 and \$350. Of the three members who stated a sterling price for world rights all languages, the average fee was £185 per image.

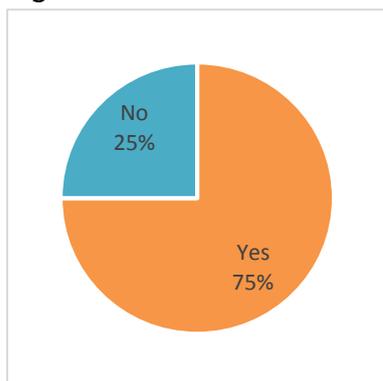
**57) What is the price for use on the cover?**

Six members answered this question. Three quoted sterling prices of which the average was £280 per image.

One indicated that custom prices were worked out, one that it depended on print-run and the other was mainly dealing with US clients with fees in the \$400 - \$1000 range.

**58) Do you have a digital only offering?**

Eight members answered this question. Six said Yes and two No.



**59) If yes, please provide details.**

Four members answered this question. Of these, three appeared to offer wide digital rights and one only ebook rights. The fees were in the range of £65-£75 or 50% of the print and digital rate.

**60) Do you include sublicensing to other publishers?**

Eight members answered this question. Of these, six said they rarely or never included sublicensing or indicated that it meant an increase to the fee. Two members did include sublicensing, but one specified that this was within the same publishing group only.

**61) Do you include promotional use in context?**

All eight members who responded to this question confirmed that they did include in-context promotion.

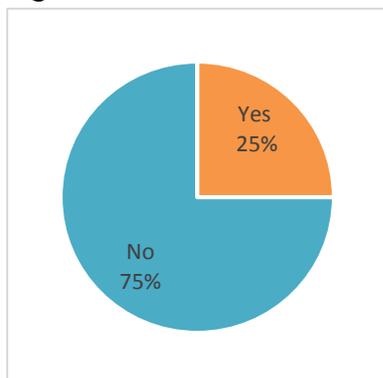
**62) If yes, please provide details.**

Six members answered this question and gave quite a wide range of answers, from social media use only to all in-context promotion. One stated that the image should be used no larger than the original use.

The most common use was in "product shots" for instance on websites such as Amazon.

**63) Do you include promotional use out of context?**

Eight members answered this question. Two said Yes and six No.



**64) If yes, please provide details.**

Two members answered this question. One said that this was by negotiation for a fee uplift, while the other indicated that it was generally also for social media use and sometimes referred to images not used in the original publication.

**65) Do you offer life of the product / in perpetuity?**

Eight members gave a variety of responses. Three of these indicated that they would not grant in perpetuity rights and two of these wouldn't grant life of product either. The other five respondents would grant these rights, but several indicated that they did so reluctantly.

**66) Does it include multiple re-use of the image within the product?**

Eight members answered this question. Three of them said that they do include multiple use, three of them do not and two of them sometimes do. Those who specified that re-use was not included said that each additional use was charged at 50% of the base fee.

**67) What trends have you noticed in terms of broad rights requests from educational publishers?**

Seven members answered this question. All indicated that requests for broader rights were increasing, that publishers wanted less limitations and expected lower fees. Two members said that publishers were wanting to buy RM images with similar rights to RF and one member said that clients expected to pay the same fee previously agreed for limited rights for much broader rights.

**68) Are there other trends you have noticed or concerns you would like to raise regarding simplified rights in the industry as a whole?**

Eight members answered this question and most of their responses seemed to refer mainly to simplified rights in educational publishing. The main trend mentioned was the increase in demand for simplified rights, with many clients giving quite vague usage details.

Concerns were raised that general picture sources were licensing images at unsustainably low prices via subscription and that they were granting rights upfront for all future editions and versions, thus reducing future revenue.

One member stressed that picture researchers were often under pressure to use RF images because they offered more editorial freedom.