State of the Industry Survey 2021 Results

BAPLA Rights Group

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A total of 24 participants completed this year's survey

Q) What percentage of your revenue is generated through RM licensing?

A) More than half of the answers detailed 100%, with three agencies detailing under 60%

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Q) What percentage of your revenue is generated through RF licensing?

A) More than half of the answers detailed saying 0%

One member reported 100%

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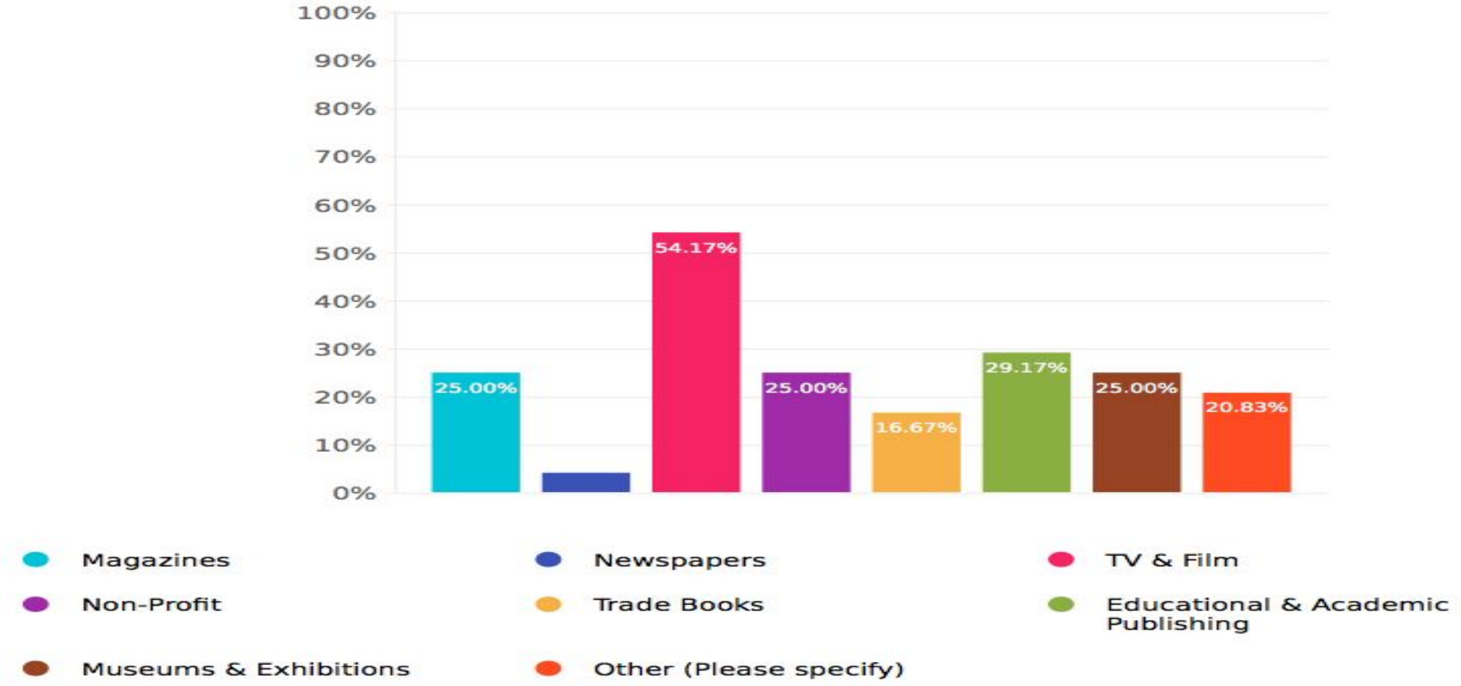
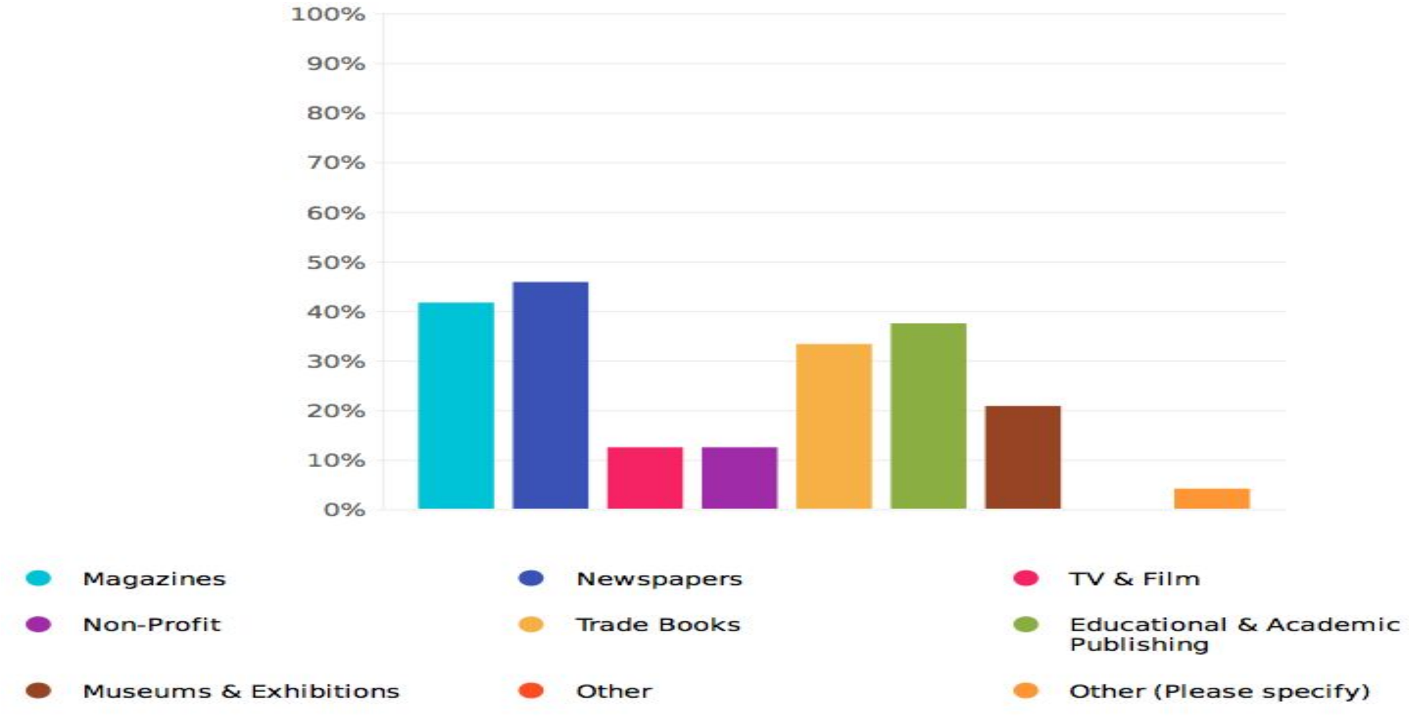
Q) Which editorial client sectors have shown the most growth?



Q) Which editorial client sectors have shown the most decline?



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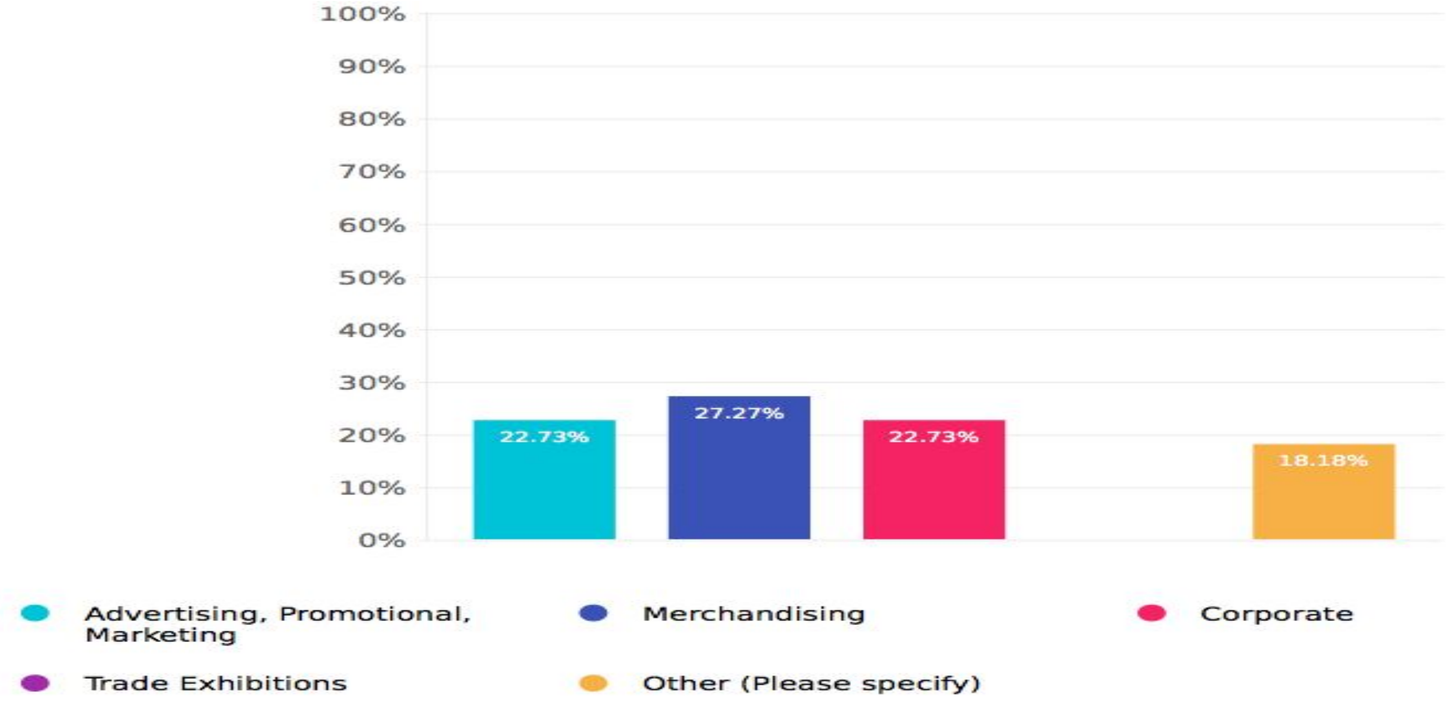
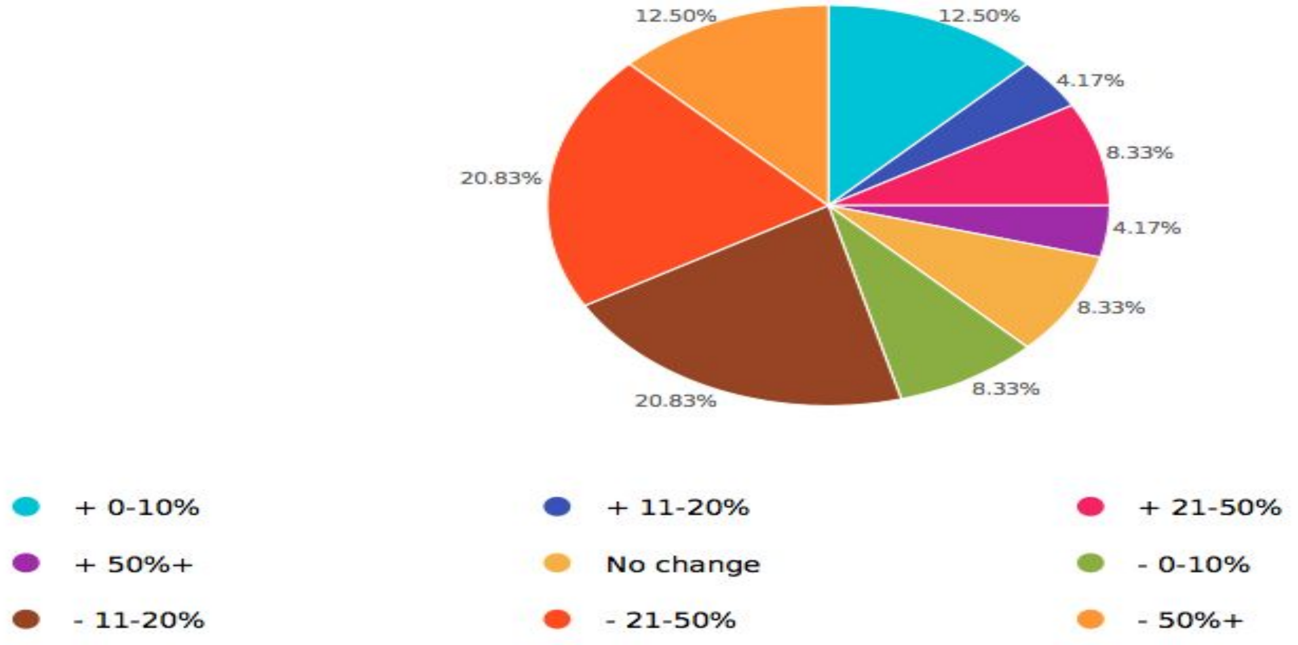
Q) Which commercial client sectors have shown the most growth?



Q) Which commercial client sectors have shown the most decline?

Q) What is the percentage of growth/decline in overall sales within the UK market?



Q) Which countries/regions have shown the most growth in overall sales?

A) Most common answers to this question are the UK and USA.

With around 25% of respondents reporting no growth and no noticeable changes.

Q) Which countries/regions have shown the most decline in overall sales?

A) A very mixed response to this question.

Responses included Europe - mostly France, Germany and Italy.

As well as - Canada, Korea and South America.

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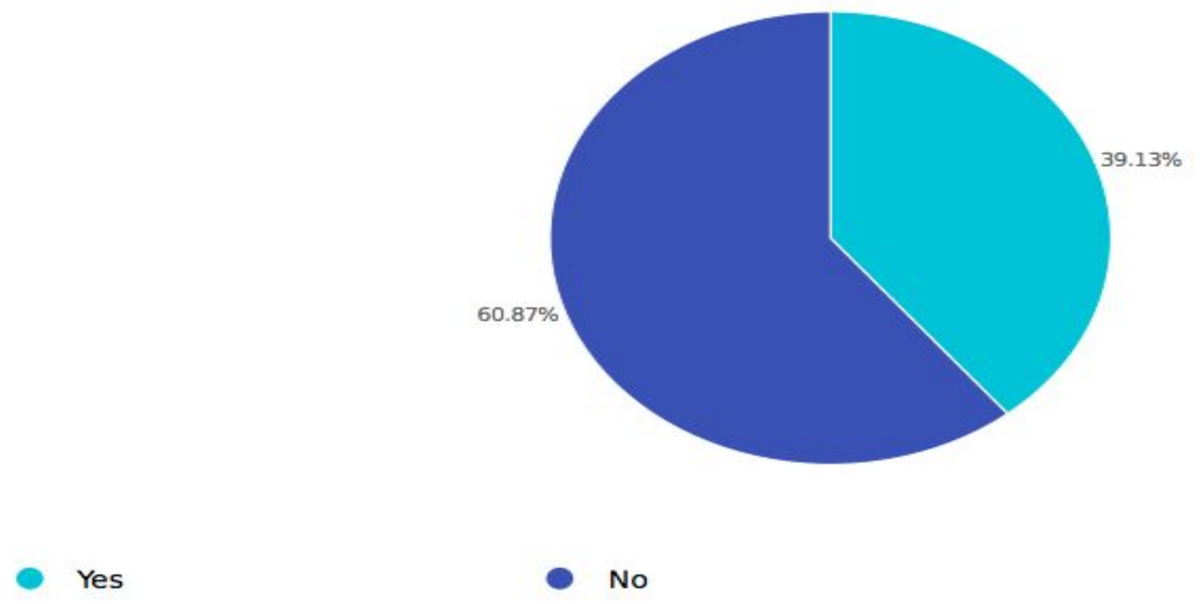
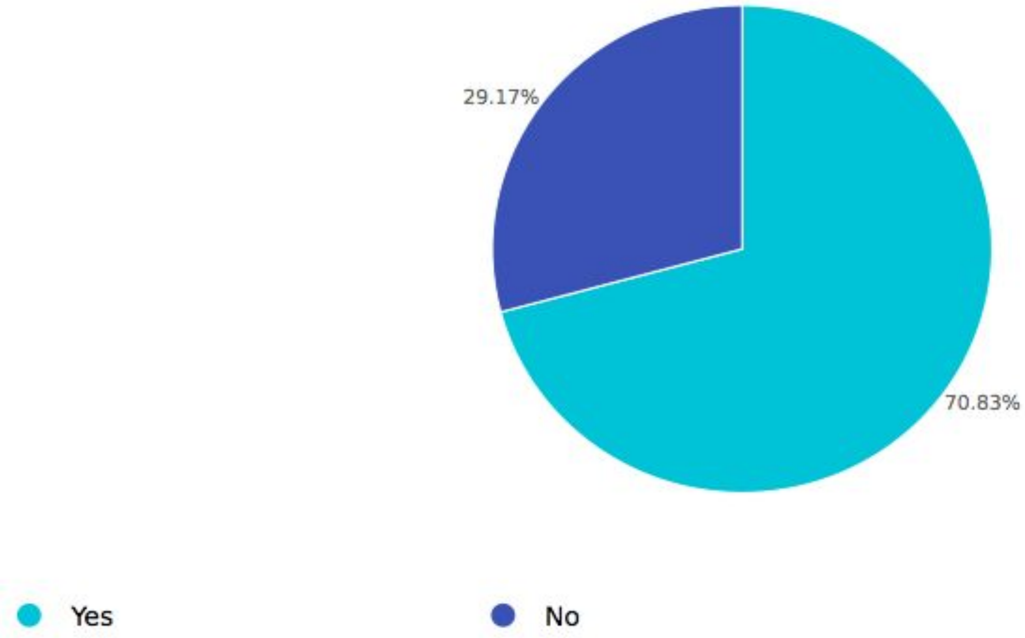
Q) Have you noticed a difference between direct and indirect sales?



Q) Do you pursue unauthorised usages / infringements?



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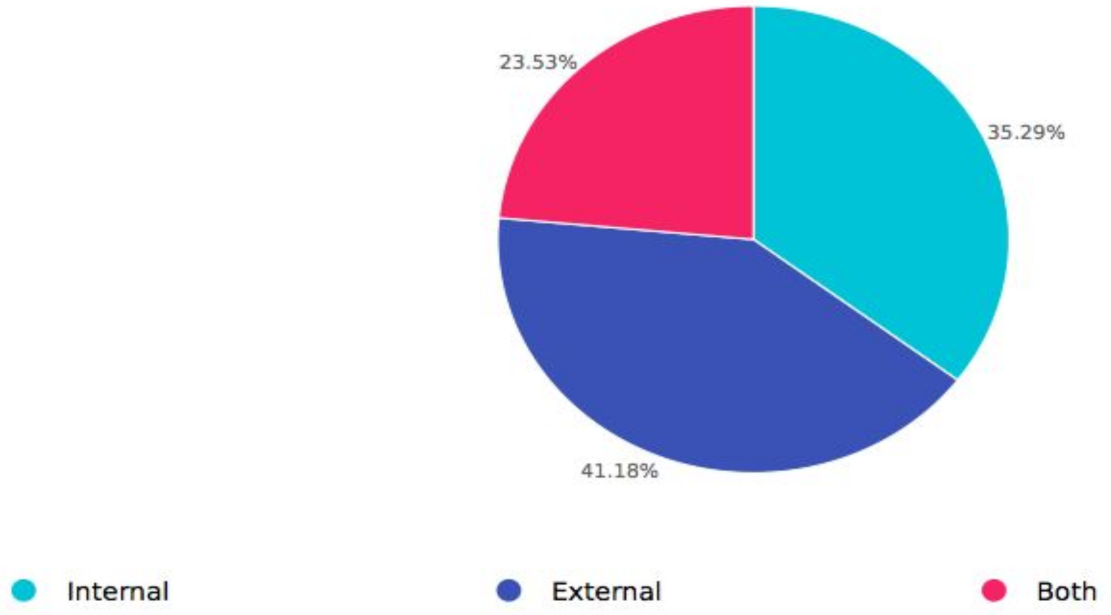
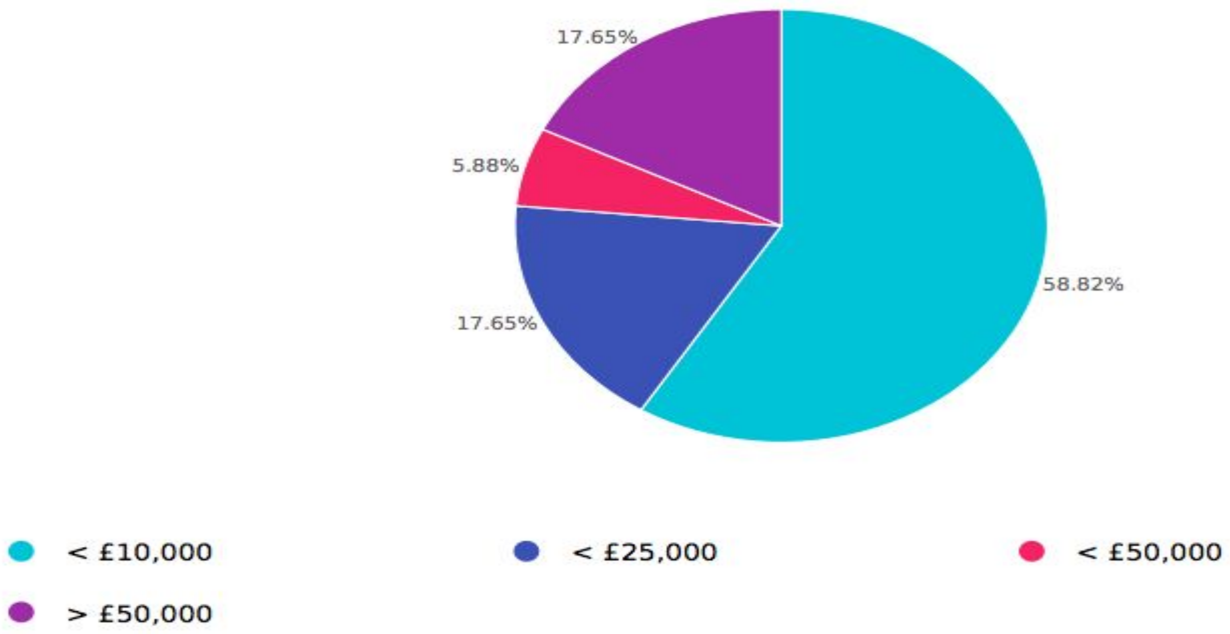
Q) If yes, is this done internally or through an external party?



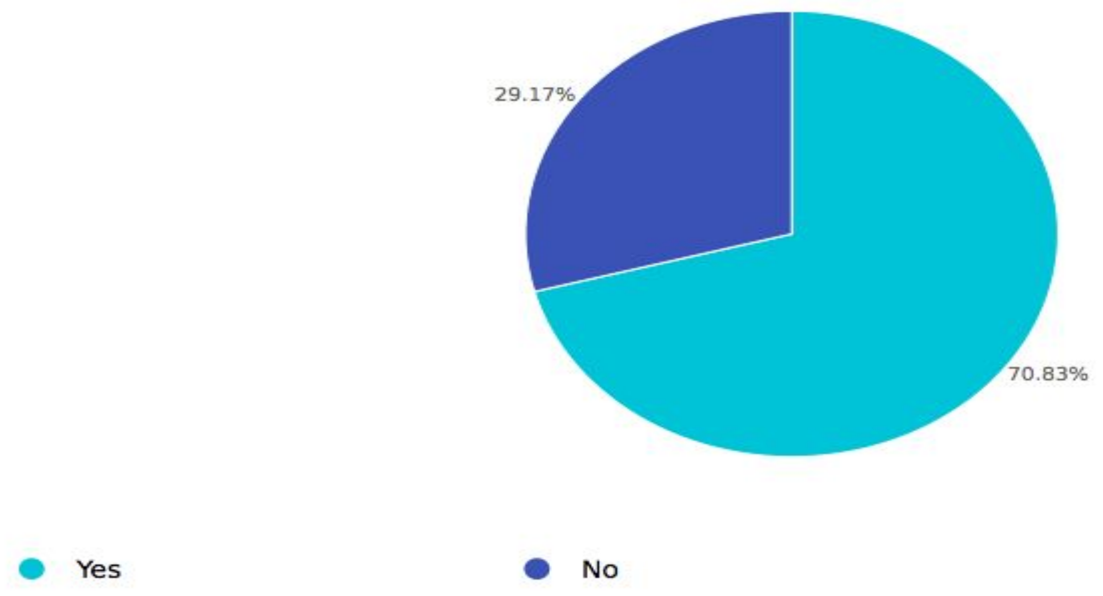
Q) Which countries/regions do you pursue infringements in?

A) Most responses were UK, Europe and North America, also worldwide or all countries.

Q) What is your total annual revenue from unauthorised usages?



Q) Do you make print on demand sales?



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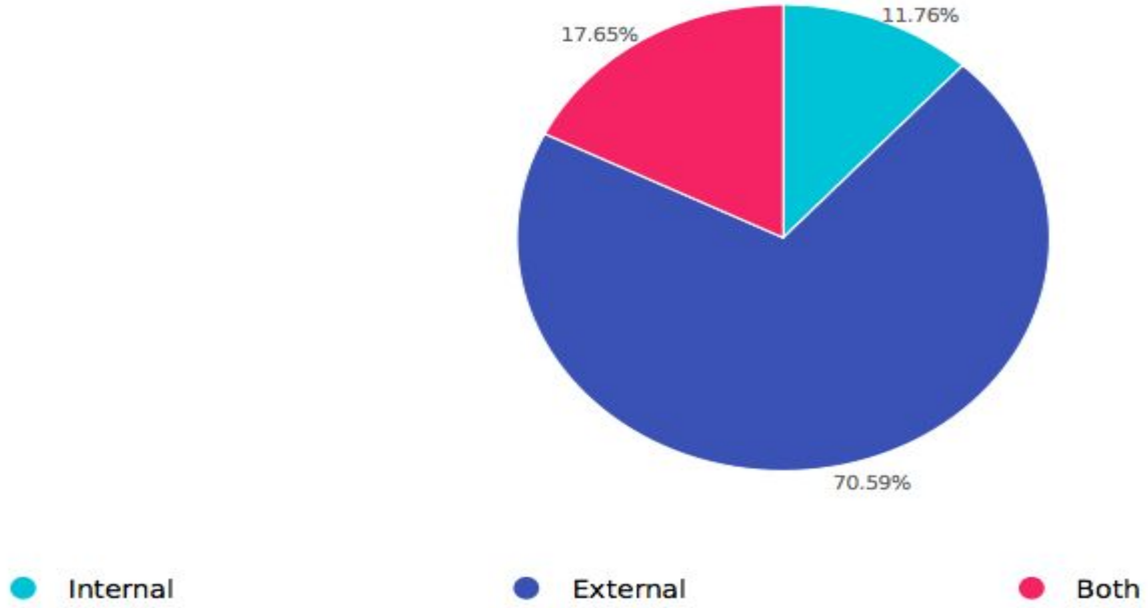
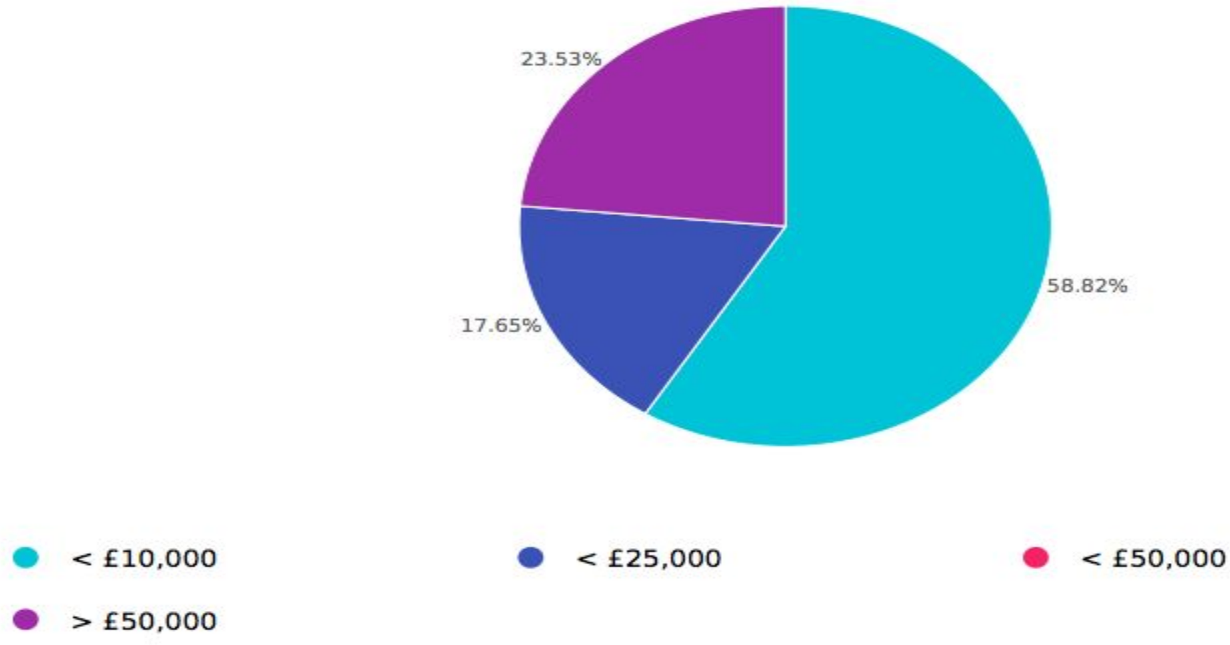
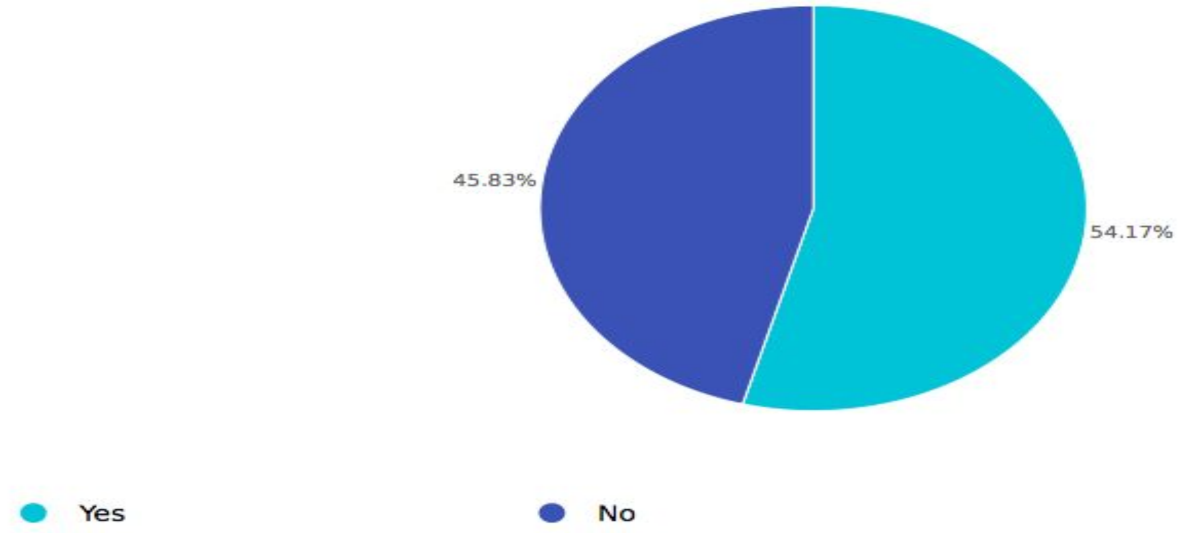
Q) If yes, is this done internally, through an external party or both?



Q) What is your total annual revenue from print on demand sales?



Q) Other than those listed above do you generate revenue through any other revenue streams?

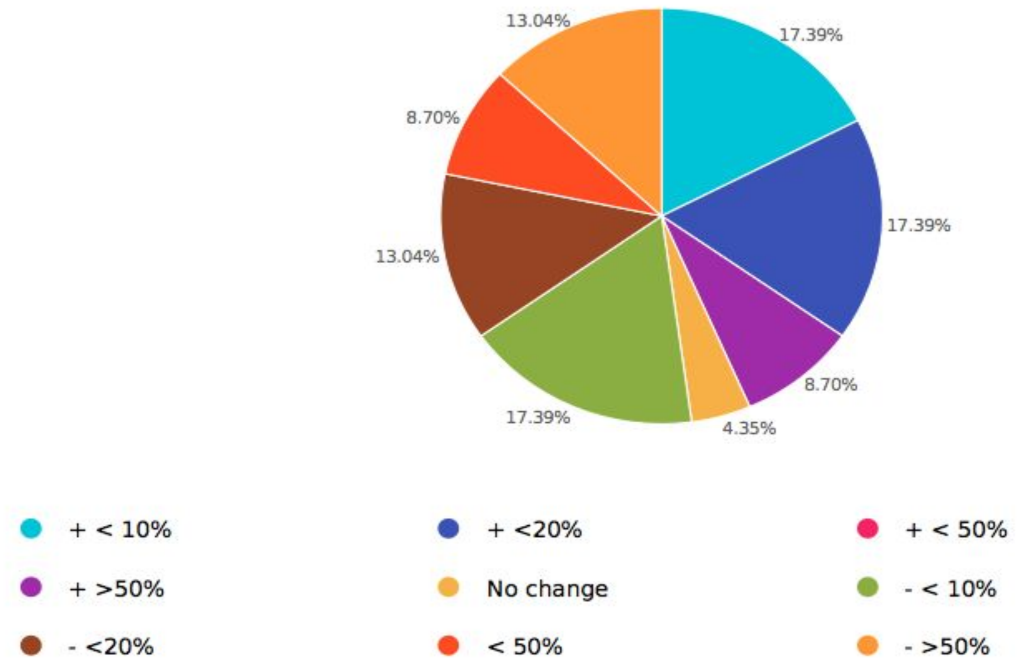


Q) Other than those listed above do you generate revenue through any other revenue streams?

Breakdown of the 54.17% / ‘Yes’ Responses:

- Collecting societies and secondary rights - for example PICSEL
- Secondary Licencing Technology Partnerships Educational Partnership
- Brand licensing
- Third party royalty sales
- Other Picture Library Agencies
- Artist Estate representation (copyright fees)
- Supply fees only (i.e. when no repro fee charged)
- Merchandise fees related to touring exhibitions
- Assignments, Exhibitions, Educational workshops
- Online products such as apps, and other digital products.
- Creation of new 3D imagery

Q) How does your total volume of sales compare to three years ago?



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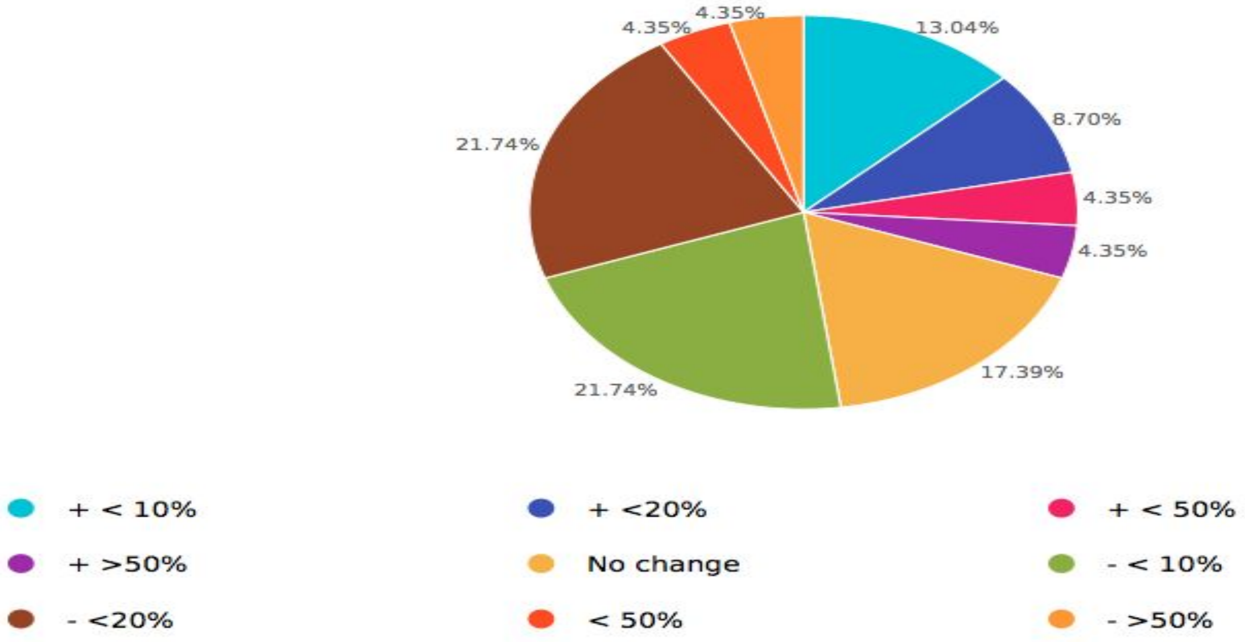
Q) How does your average price per picture compare to three years ago?



The State of the Industry Survey 2021
Summarised answer to the final question:

Amongst the sales and licensing trends there seem to be a lot of ups and downs even within the same agencies during the last three years as changes under Covid affect the market.

The most common concern is about all rights licensing terms that are being requested by clients including but not limited to “Rights grabbing publisher contracts.” Traditional usage terms limited to formats, duration etc are being stretched under blanket licences, often more than what is actually needed as companies strive for simplified rights to save themselves time and money. It’s difficult for smaller agencies (particularly specialists despite their importance to the market) to compete with subscriptions, all rights deals and RF options.

Some companies are reporting a lot more e-commerce sales (including online print sales) and spending in SEO and marketing appears to have helped drive this.

Brexit was only mentioned by one agency as being an issue and they had managed to get through the bureaucracy without too much impact.

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The State of the Industry Surveys 2018 & 2021
Comparison and conclusions

- 22 responses in 2018 and 24 in 2021 (in spite of less members).
- RM slightly less dominant over RF in 2021 than it was in 2018. No member reported 100% RF sales in 2018.
- Most editorial growth in 2018 from books, in 2021 from TV.
- Significantly higher percentage of members reported decline in both book and magazine sales in 2021 compared to 2018 (in 2018 5 members reported books decline, in 2021 it was 8/9: in 2018 5 members reported magazine decline, in 2021 it was 10).
- More members in 2021 reported both increase and decline in commercial sectors – which suggests this was a volatile sector where members experienced quite contrasting fortunes.
- In 2018 US was the predominant territory for growth; in 2021 there was more of a spread, with UK and Europe featuring more.
- In 2021 France showed much more decline and US less so, UK was similar (again a picture of contrasting fortunes).
- In 2018 80% of respondents pursued unauthorised use; in 2018 this had declined to 70%.
- In 2018 63% of respondents made print sales, while in 2021 it had increased to 70%.
- Volume of sales compared to 3 years before – in 2018 54% reported increase and 31% fall, in 2021 42% reported increase and 52% fall.

With thanks to the BAPLA Rights Group for their contribution in compiling this survey.

BAPLA Rights Group members include Tim Harris, Ruth Hoffman, Chris Sutherns and Rachel Wakefield. Chaired by Yvonne Aldsworth.

For further information or any queries
please don’t hesitate to contact us: enquiries@bapla.org.uk