

THE FUTURE OF FOOTAGE

The stock footage business is in a state of flux. Many archives, having digitised much of their content, are branching out into new sectors and abroad. Tim

Dams reports on an industry looking to lessen its reliance on British TV

The stock footage industry has long had a rather frumpy, old-fashioned reputation, conjuring up images of well thumbed index cards and bearded researchers hunting down cans of film in dark cellars.

In many cases, this clichéd view of archives is about as wrong as it gets. Most modern day stock footage archives have embraced new technology to help them deliver content to clients all around the world.

"Archives have dusted themselves off, and got rid of the reputation of being about people in brown overalls working down in the bunkers," says Alwyn Lindsey, international director of AP Archives.

In recent years, the UK and continental European archives have been investing heavily in digitising catalogues that go back to the very early days of the moving image, allowing customers to search for content online and to receive it via the internet or FTP.

Newsreel archive British Movietone News, for example, digitised all of its 2,000 hours of material five years ago. Likewise, all 3,500 hours of British Pathe's historic archive have been digitised. Larger libraries like BBC Motion Gallery, AP and ITN are still in the process of digitising their content, so vast are their catalogues. ITN Source md Asha Oberoi says she hopes

do the 20% that will generate 80% of your income."

This process of digitisation has allowed archives to diversify into new sectors such as online video, education and museums. They have also been able to build their businesses internationally, scouting for customers in fast growing territories such as China, India and the Middle East. Conversely, rival European libraries such as France's INA and Germany's Framepool have stepped up their activities in the UK. "The key driver for our growth is basically making more of the archive accessible and putting it online," says BBC Motion Gallery md Simon Gibbs.

Television is still the key customer for stock footage businesses. ITN, for example, reckons 80% of its business comes from the broadcast market. AP says 70% of business derives from broadcast. "Three to four years ago, it would have been about 95%," says Lindsey.

Despite the growth opportunities, there remain many pressures on stock footage business. Far more people now have access to video cameras meaning that the value of footage is arguably less than it was. Business is tougher for smaller archives unless they have footage that nobody else has. Smaller archives,



ITN Archive



Framepool



AP Archive



British Pathe



AP Archive



AP Archive



British Pathe

to digitise all of the content from two of its key archives, ITN and Reuters, by the end of 2011 – a total of 70,000 hours.

The investment required is significant. Lindsey reckons that 10% of AP's 70,000 hour archive has so far been digitised and that it will cost about \$2m to digitise the remainder. "For most archives, it is a multimillion pound investment. So you prioritise. First of all you

meanwhile, question the service levels of bigger companies which are inundated with footage from 24hr news outfits.

"A careful study of press releases coming out of the archive business over the last five to six years will sound not unlike political leaders making campaign promises before an election," points out Barry Florin, md of British Movietone News. Florin describes Movietone as a boutique library offering quality service, ▶

experienced staff and a 'family' atmosphere. The economics of the business are tough too. One footage boss posits the following scenario. "Say you charge £400 for 30 seconds of footage. To earn £1m in revenue over a year, you need to make 2,500 sales. That's nine sales a day, or about one sale an hour. So think about that if you are trying to turnover £10m."

The TV market has, unsurprisingly, proved difficult for stock footage outfits. Broadcasters slashed budgets and commissions in 2009 as the recession bit.

Some archive bosses insist, however, that things haven't all been bad. "There are fewer commissions going through, but factual commissions are pretty strong. Drama and entertainment have been hit more," says Alastair White, general manager of British Pathe, which used to be repped by ITN Source but is now privately owned and selling its own content. "I wonder if the archive business is a little bit recession proof. We are in the position of having unique footage – we are not in the business of selling footage of cornfields or clouds. If you want footage of something in the Pathe archive, there are not many places you can get it."

BBC Motion Gallery's Gibbs acknowledges that the traditional customer bases of most archives – TV producers and advertisers – are under financial pressure. But he also sees some positives in this. "Stock footage to a degree acts as a substitute for more expensive original production. It's expensive to shoot an aerial shot of New York City, and much easier to buy a clip. On that

principle we are finding that

The European archive market has, arguably, been harder hit than the UK. Jean-Luc Vernhet, marketing director of leading French stock footage library INA, says there's been a "double crisis" in France, with the recession and with the government banning advertising after 8pm on public channels in 2009. "It came at the worst possible time. France Television announced it was going to reduce the cost of programmes by 20%, Canal Plus by 25% and M6 by at least 25%."

Germany's Framepool, meanwhile, had experienced strong growth in markets like Eastern Europe and France. This all came to a halt with the recession and is only slowly coming back. CEO Stephan Bleek, says Framepool, which has 500,000 shots on its Framepool.com website, "is targeting growth in markets like the UK and the US." As is INA. "The key programme for us is to build awareness of our brand," says Vernhet, who adds that INA holds 450,000 hours of digitised footage.

International growth is very much on the agenda of UK archives too. ITN's UK losses, Oberoi says, have been offset by its growth internationally. She estimates that 50% of ITN Source's revenue comes out of the UK, with about 50% from the rest of the world. "When I first started three years ago, the percentage was 80:20 for UK versus international."

Last year, for example, ITN Source signed two key deals in China, one to supply footage to leading commercial broadcaster, Shanghai Media Group.

Over at BBC Motion



AP Archive



ITN Archive



Framepool



BBC Motion Gallery



British Pathe



Framepool



AP Archive

production teams are willing to use archive." He adds: "We are certainly not recession proof and sales are tough. But there's a degree of resilience."

ITN's Oberoi says the perfect storm of recession and commissioner changes at broadcasters caused a production hiatus. "We lost revenue in the UK in 2009, but that was mostly to do with our separation from British Pathe. Had we maintained our content portfolio as before, we wouldn't have seen a loss in the UK – we would have been relatively flat."

Others think the use of archive is growing. Stephan Bleek, CEO of Framepool, points to the increasing use of "projects that combine re-enactment with footage" citing films such as the Sean Penn starring *Milk* or a new production about German Chancellor Helmut Kohl.

Gallery, Simon Gibbs says that "two thirds of our business is overseas." Last October, Motion Gallery formed a "strategic relationship" with US-based Thought Equity Motion. The complex deal sees the BBC gain access to Thought Equity's advanced search technology. Thought Equity also now sells BBC Motion Gallery footage into North America and Asia, while Motion Gallery will be able to sell certain Thought Equity content in Europe, the Middle East and Africa. This includes footage from libraries such as National Geographic, Paramount, Smithsonian and HBO.

Gibbs, speaking ahead of a major overhaul of bbcmotiongallery.com on March 1, says Thought Equity has "the finest technology platform in the industry," enabling the BBC to "dramatically



AP Archive

Footage

increase the number of clips we put up on the website.” Search, he says, will also be easier. “The deal is purely one of strategic partnership – no cash has changed hands. We basically share technology and we have also gone so far as to share our sales forces so there are big cost savings. There is a commercial arrangement to divvy up the revenue.”

The other key trend in stock footage is the increase in requests coming

and stills library. “Museums require moving image for their exhibitions,” says Pathe’s Alastair White. “But the pricing model used to be prohibitive. That’s why we established a subs model where they could take as much footage as they’d like for a given set of rights.” Museums, he adds, “are signing up in droves – subs are in the hundreds.”

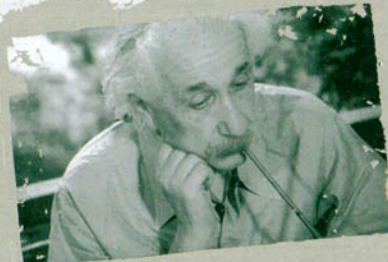
Similar deals are



AP Archive



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BBC Motion Gallery



AP Archive



AP Archive

from the online world for video content on websites. This could be newspapers’ looking to enhance their websites by contextualising a current story with footage from the past. Or it could be business aiming to boost their corporate websites. Many websites now prefer to use videos rather than stills to enhance their content.

Revenues coming from the online world are, for now, “small beer” says Motion Gallery’s Gibbs but will “certainly represent an increasing part of the business going forward.” AP’s Alywn Lindsey adds: “Ad revenue is going out of TV and is going online. It hasn’t bedded down yet, but it is happening.”

The internet has also fuelled interest in archive video in sectors such as education and museums. British Pathe, for example, recently launched an initiative with the Museums, Libraries and Archives Council, which allows cultural organisations to pay a fixed subscription - £60 a month - for unlimited access to Pathe’s footage

being done in the education market.

ITN, for example, has launched a dedicated education service called the Education Clip Library. “We don’t try and force ITN Source as an archive product on each sector like education or heritage. We have created a brand new product,” says Oberoi. “Before we were selling seconds and minutes as we would to a producer. Now we are selling clips and packages of clips in education.” The deals are usually annual subs for a minimum level of clips. The clips are used by teachers as a teaching aid, or by students to help with research or to enhance projects.

It’s just one example of the many kinds of deals that stock footage libraries are now striking as they diversify. For many it’s about maintaining a firm eye on the bedrock of their business, broadcast, but looking to develop in new areas. Oberoi speaks for lots of archives when she comments “My job is all about balance. Balancing traditional markets with new markets and keeping our product relevant.”



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