



THE BRITISH
PHOTOGRAPHIC
COUNCIL

**Industry Survey of
Photographers 2010:
Full results and analysis**

Prepared by Nick McGowan-Lowe on behalf of the British Photographic Council
July 2010



Methodology

- 0.1 The survey was designed and arranged by the British Photographic Council. The thirteen member organisations of the British Photographic Council contacted their members to ask them to contribute. The member organisations are: the Association of Photographers, the British Association of Picture Libraries and Agencies, the British Press Photographers Association, the British Institute of Professional Photographers, the Bureau of Freelance Photographers, the Chartered Institute of Journalists, Editorial Photographers UK and Ireland, the Master Photographers Association, the National Association of Press Agencies, the National Union of Journalists, Pro-Imaging, Redeye, and The Royal Photographic Society.
- 0.2 The survey was carried out online between 24th May and 13th June 2010. This survey is referred to “the 2010 survey”, although the answers relate to the year 2009. Likewise, last year’s survey – the “2009 survey” referred to the year 2008.
- 0.3 A total of 1,698 photographers contributed to the 2010 survey, an increase of 64% compared to the 2009 survey.
- 0.4 Two of the survey sections were optional. 96% of respondents opted to answer the section on copyright, and 82% opted to answer questions about their business.
- 0.5 The final question asked respondents to add any further comments, and 208 chose to do so. A representative selection of these comments have been placed next to the most relevant survey question.
- 0.6 Unless otherwise stated, the results shown in this report have been filtered to show only responses from those who identified themselves as professional photographers or picture suppliers.



1. What is your age and gender ?

Fig 1.1 Distribution of professional photographers by age, as percentage of total

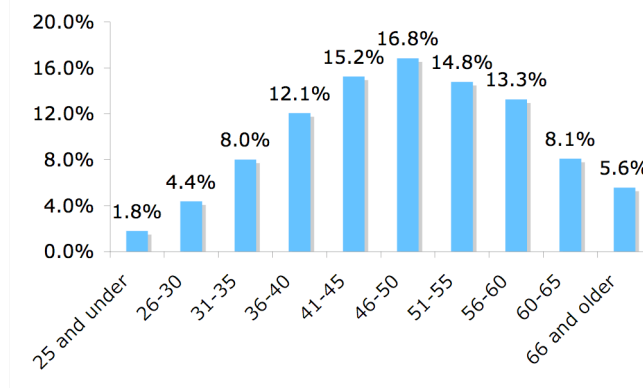


Fig 1.2: Male/Female split

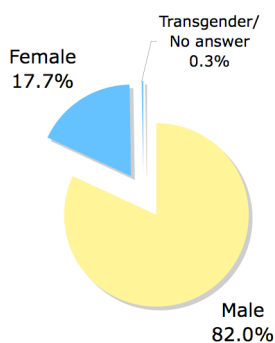
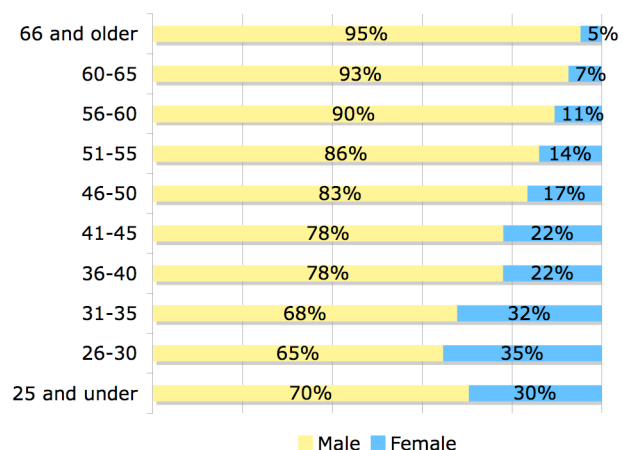


Fig 1.3 Male/Female divide by age



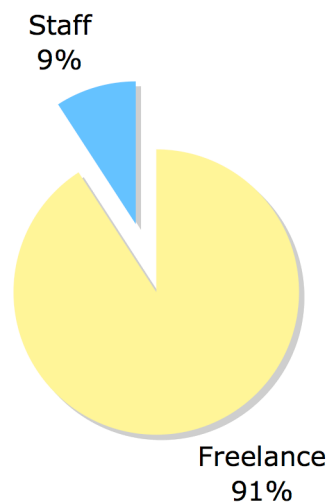


- 1.1 The overwhelming majority of those who responded to the survey were male (82%). This was true in every age band.
- 1.2 With the exception of the lowest age band - where the sample size was too small to draw a definite conclusion – there was a strong inverse correlation between age and the percentage of female respondents. In short, the older the age band, the lower the proportion of female photographers.
- 1.3 The author considered the possibility of survey bias, in that male photographers might be more likely to respond to the survey and so be disproportionately represented. To test this, the known gender split from the members of one of the survey groups – photographers from the National Union of Journalists – was compared with the gender split from that group who responded to the survey. Both results were consistent - 83% male in both cases - suggesting that both males and females were equally likely to contribute to the survey..
- 1.4 With just one year's data, it is not possible to ascertain whether, for example, this represents more women entering the industry over the last 40 years, or whether it reflects that women are more likely to leave the industry as they get older.
- 1.5 There were a relatively small number of respondents who identified themselves as aged below 25. This may reflect either a low number of entrants into the industry in recent years, or more likely that those in the industry only join a professional or trade association when they become older.
- 1.6 The results showed an uneven distribution of ages over the decades, with 6.2% in their twenties or younger, 20.1% in their thirties, and 32% in their forties. One possible explanation of this distribution could be that over the last 20 years, it has become more difficult to enter into the industry.



2. In 2009, were you freelance or staff?

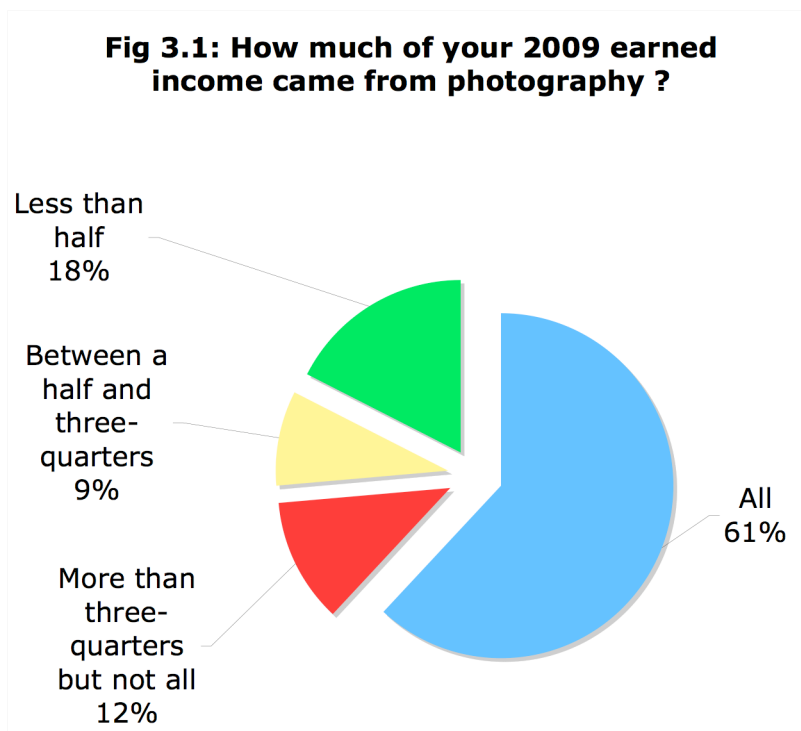
Fig 2.1 Freelance/staff split





- 2.1 The question as phrased asked respondents whether in 2009 they were best described as (i) a freelance/business-owner; (ii) a staff photographer, or (iii) an amateur, with each option being mutually exclusive.
- 2.2 For the purposes of the survey, respondents who identified themselves as amateur photographers were filtered from the final results.
- 2.3 9% of professional photographers were staff photographers, with 91% freelance.
- 2.4 Staff photographers surveyed tended to be younger than freelances – with an average age of 42.4 years, as opposed to 48.7 years for freelances.
- 2.5 There was no significant gender split between staff and freelances, with both being 83% male.
- 2.6 The single largest group of staff photographers worked in news photography.
- 2.7 Staff photographers surveyed tended to be working in newspapers, magazines, or the corporate sector .

3. In 2009, what proportion of your income came from photography ?





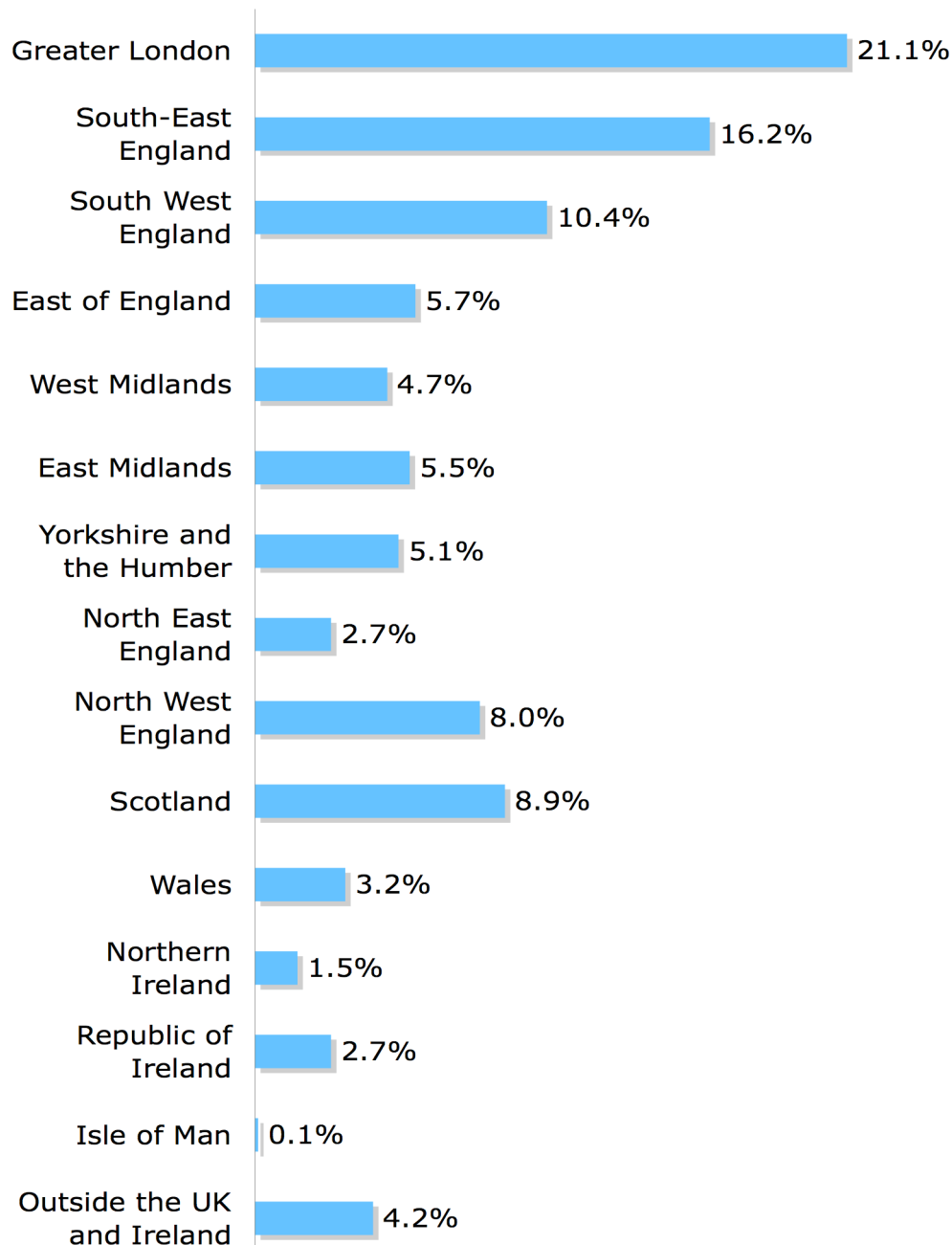
**“I believe being able to
earn a living as a full time
pro photographer is
coming to an end”**

- 3.1 39% of those who described themselves as professional photographers also had a separate earned income in 2009.
- 3.2 86.5% of staff photographers said that all of their earned income came from photography. The equivalent figure for freelances was 59.4%, meaning two in every five freelances have an additional income stream from outside the photography industry.
- 3.3 Overall, one in five of those who described themselves as a professional photographer earned less than half of their income from the photography industry.
- 3.4 On average, staff photographers earned more than freelances. More detailed figures can be seen under question 19.
- 3.5 These figure suggest that a significant number of photographers, especially freelances, supplement their income from photography with additional income from other sources.



4. Where were you based in 2009 ?

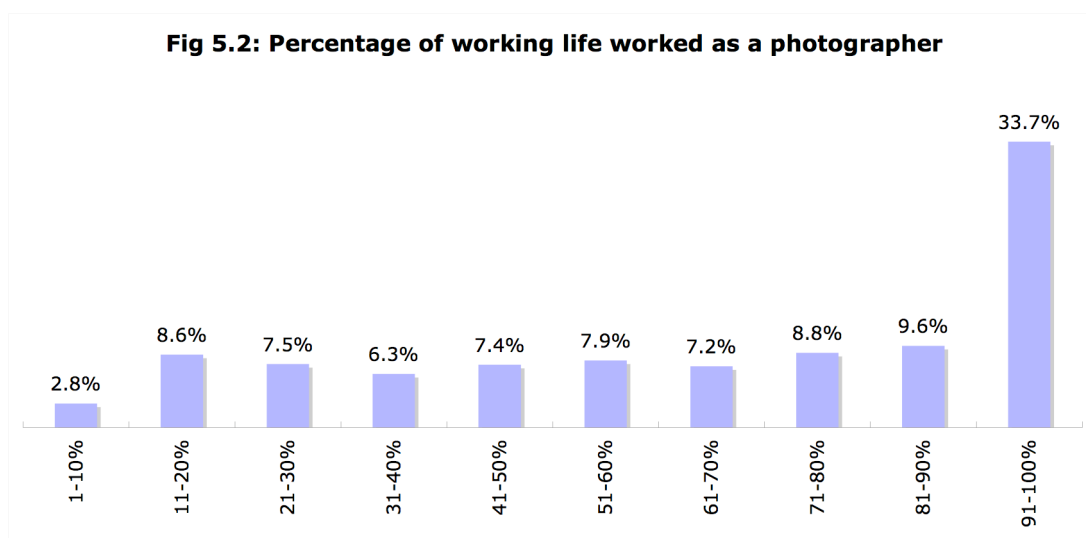
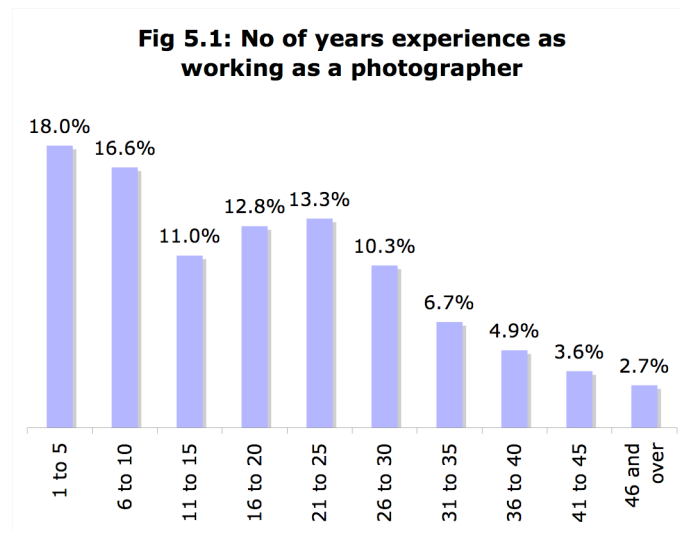
Fig 4.1: Geographical spread of respondents during 2009





- 4.1 The totals for England, Wales and Scotland were 79.4%, 3.2% and 8.9%. 4.2% of respondents were from the island of Ireland.
- 4.2 Based on the 2008/9 population estimates, the population split between Great Britain is 86% in England, 5% in Wales and 8.7% in Scotland. The equivalent split among respondents was 87%, 3.5% and 9.7%. Assuming that the number of photographers in each country is in proportion to the general population, this suggests that photographers in Wales were slightly under-represented in the survey, and photographers in Scotland were slightly over-represented.
- 4.3 The same calculations and assumptions may suggest that the island of Ireland was significantly under-represented among respondents. The population of Northern Ireland and the Republic of Ireland is approximately 10.4% that of England, Wales and Scotland combined. However, in the survey results, respondents from Ireland totalled just 4.6% of those from Great Britain.
- 4.4 One in five respondents were based in Greater London, an administrative area which has approximately 7.5m people – or 12.6% of the population of Great Britain. Based on the survey figures, the proportion of photographers in Great Britain based in Greater London is 23.1%, suggesting that the proportion of photographers to the general population is twice as high in the Greater London area.

5. How long have you worked as a photographer ?





“For the past 30 years I have worked at the top of my game, and for the past 5 years I only ever get asked how cheaply I can shoot a job for”

- 5.1 Over half of all photographers – 54% - have more than 15 years experience of working as a photographer. 10% have more than 36 years experience. A fifth have less than five years experience.
- 5.2 Only a third of photographers have spent the 91% or more of their working life working as a photographer. Only half of photographers have spent 71% or more of their working life in the photography industry.
- 5.3 While there are no known figures to make comparisons with other careers, the statistics suggest that the majority of photographers will at some point in their working life seek employment outside photography
- 5.4 In general, figure 5.1 shows a decreasing amount of photographers per years experience. This shows an increase around 16-25 years experience, which appears to go against the general trend. This can be explained by comparing with figure 1.1 which shows 46.8% of respondents were in the 41-55 age group. It seems likely this demographic blip is reflected in the equivalent experience figures.
- 5.5 Just over a third of respondents (34.6%) said they had ten years or less experience in the industry. If the majority of photographers entered into the industry in their early twenties, there would be a corresponding percentage of photographers in figure 1.1 aged between 20 and 30, but the figure 1.1 shows less than 7% actually were. This suggests that a significant amount of photographers entered into the industry at a later age.
- 5.6 This hypothesis is supported by examining the figures of those professional photographers who have worked in the industry for three years or less. On average, this group said that they had previously worked outside the photography industry for 15.6 years, suggesting that a large number of new entrants into the industry are middle aged and have spent a significant amount of time working outside the industry before they decide to become photographers, and that they first become photographers in their mid to late thirties and early forties.

6. What formal qualifications do you hold ?

Fig 6.1: Formal qualifications of respondents

| | I have achieved this level of qualification in one or more non-photography subjects | I have achieved this level of qualification in a photography-related subject. |
|-----------------------------|--|--|
| GCSE/O Level/Standard Grade | 78.6% | 13.6% |
| A Level/Scottish Higher | 47.4% | 8.3% |
| HNC/HND/BTEC | 15.3% | 17.8% |
| Diploma | 12.1% | 12.9% |
| Undergraduate degree | 28.1% | 13.4% |
| Masters degree | 6.9% | 4.0% |
| Doctorate | 1.6% | 0.4% |



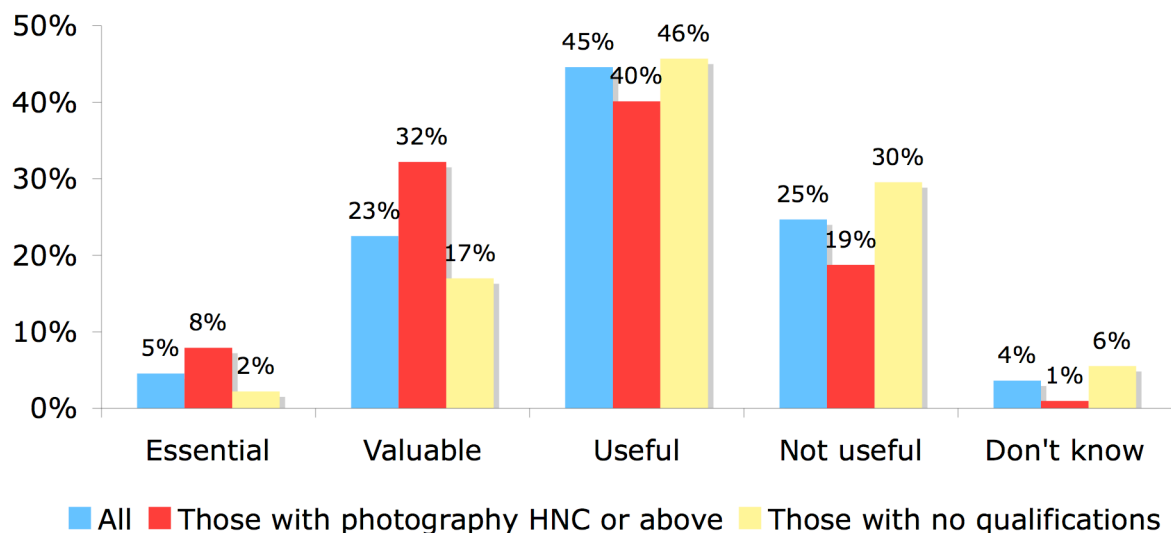
“Photography has become one of the largest if not the largest single want to have job in the UK. Anyone and everyone now feels they can be a photographer and do what they want in terms of price, copyright, deception etc. Photography has become a subject in schools so again it is becoming a prime target for school leavers. “

“Only professionally qualified photographers should be allowed to operate and practice the medium as a profession. Although the advent of digital has been fantastic, the flood-gates have been opened for all the 'johnny come Saturdays' who don't undertake any training to become professional photographers overnight.”

- 6.1 Respondents to the survey tended to have qualifications across a range of subjects.
- 6.2 Overall, 53% of respondents did not have any of the listed qualifications in photography, although many also added they had qualifications from courses not listed, such as City and Guilds and the NCTJ course.
- 6.3 41.5% of photographers have an undergraduate degree – but those that do are twice as likely to have it in a non-photography subject than a photography-related course.
- 6.4 Of professional photographers surveyed who were aged between 18 and 40, 24.5% had a photography degree, compared to just 9% of those aged 41 and over.

7. How useful are formal qualifications ?

Fig 7.1: Views on usefulness of photographic qualifications





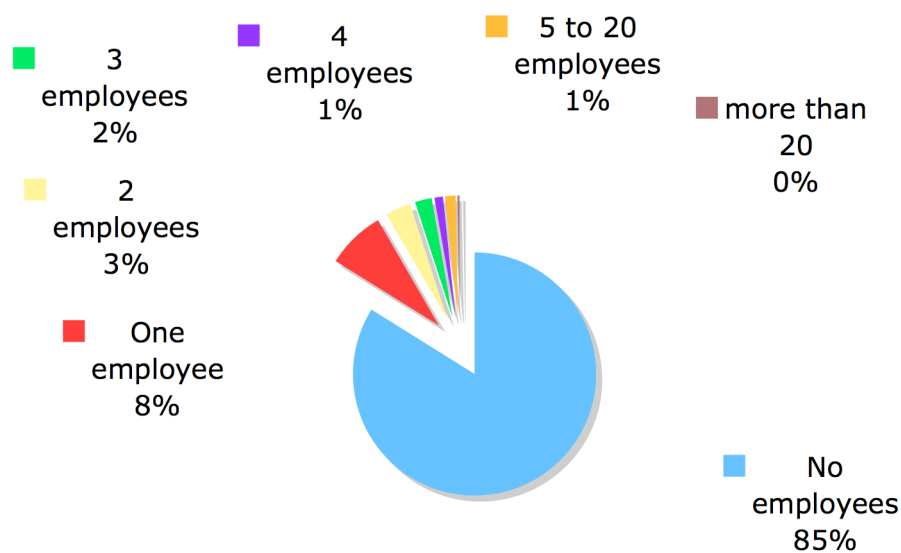
“There are more photographic students graduating each year then there are working professional photographers. The cost of entry is minimal these days, and yet some of the newcomers, especially in the social/event and wedding market are not professionals, just keen amateurs who read one of the multitude of monthly magazines and think that because they have read the article they can go out and do the job!”

“Colleges often produce students with no knowledge of business practice least of all how to cost out a job to make a profit to live and pay the rent!”

- 7.1 Overall, 73% of respondents said they thought formal photography qualifications were “essential, valuable or useful”.
- 7.2 Three times as many respondents considered photography qualifications to be of use compared to respondents who considered photography qualifications “not useful”
- 7.3 Of those who had a qualification in photography at HNC level or above, 80% said they thought photography qualifications useful, compared to 65% of those who had no photography qualifications.
- 7.4 Only 5% of respondents considered photography qualifications “essential” to working in the industry. This reflects the findings under question 6 where a little over half of respondents had no formal photography-related qualifications.

8. Do you employ anyone ?

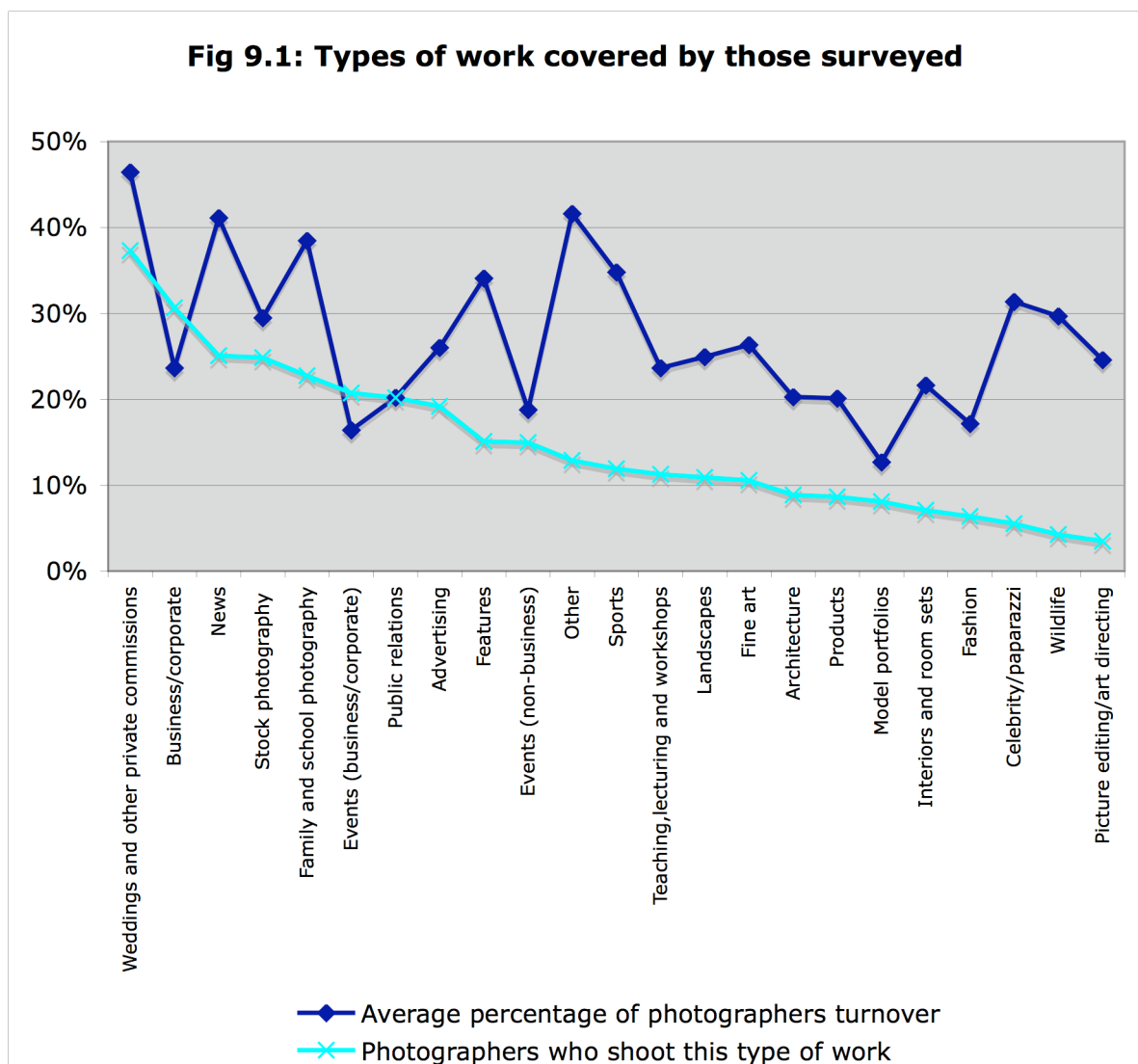
Fig 8.1: Number of employees per freelance respondent





- 8.1 Respondents were asked whether they employed anyone in addition to themselves, and if so, how many.
- 8.2 The overwhelming majority – 85% - of freelance or business-owner photographers work without any employees.
- 8.3 Only 7% of respondents reported that they had more than two employees.

9. In 2009, what areas of work do you cover?





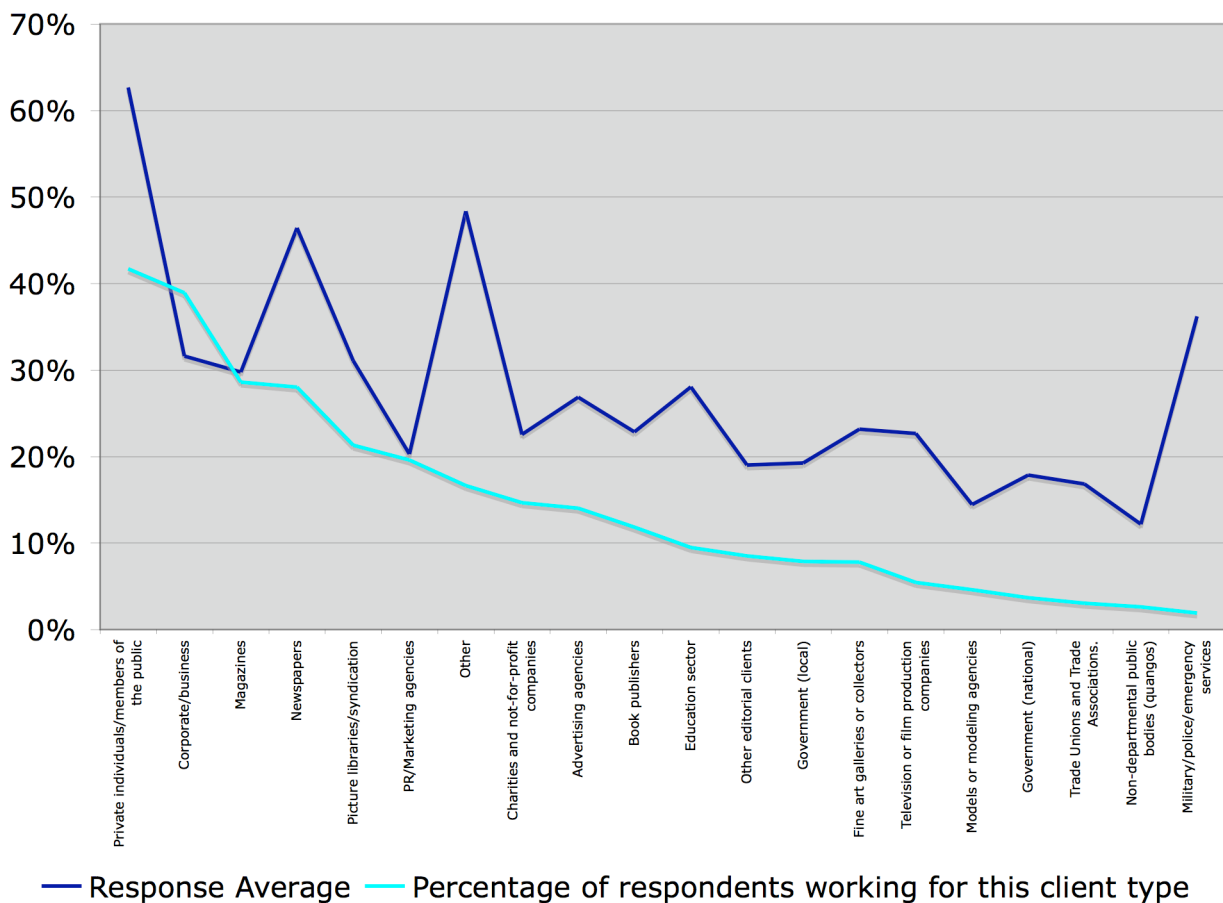
“Although I set out five years ago as primarily a news photographer there’s no way I could survive, papers don’t have the budgets and the agencies want to squeeze as much as they can. Now nearly all my income is from weddings and corporate / pr work for companies”

“Falling rates are the biggest factor in this industry. Rates remained stationary for years and were due a rise, however the opposite has happened in recent years with dramatic effect... The feeling is that editorial photography is dead!”

- 9.1 Freelance respondents were asked to say what proportion of their turnover came from each type of photography.
- 9.2 The light blue line in the graph reflects the percentage of photographers who indicated that they shot at least some of that type of photography. For example, the light blue line shows less than 10% of respondents said that they shot celebrity/paparazzi, products, interiors, architecture, fashion, model portfolios or wildlife.
- 9.3 The darker blue line – the average turnover share - takes an average of each respondent’s figures for the percentage of their turnover which comes from each area of photography. For example, of those respondents who indicated that they shoot news photography, on average news photography contributed to 40% of their income.
- 9.4 The average turnover share does not go over 50% for any of the areas of photography, reflecting that few photographers specialise in any one area.
- 9.5 The distance between the two blue lines can indicate areas of photography which tend to attract specialists. For example, while only 6% of respondents – one of the lowest figures - shoot celebrity or paparazzi photography, the average turnover share was over 40%, indicating that those who shoot celebrity photography tend to specialise and derive most of their income from that area. The results indicate the same is also true of news, sport and wildlife photography.

10. In 2009, who did you work for ?

Fig 10.1: Client type and the average proportion of turnover from each





“Improved technology and lower cost of good digital cameras means more people can take adequate or competent photographs. Departments now use their waged employees to take photographs at no extra cost, that I would once have been paid to do. I am being commissioned to do more specialist photography but all my clients have tried to cut corners to meet their own budgets”

- 10.1 In figure 10.1 the light blue line shows the number of photographers who indicate that they work for that type of client. The graph is arranged so the most common types of client appear on the left, and the least common on the right.
- 10.2 The dark blue line – “response average” shows the average turnover each sector represents among photographers who work for that type of clients.
- 10.3 Where there is a general correlation seen between the two lines, it means that working for that type of client had a proportionate effect on turnover. Where the lines are furthest apart – for example, with “military/police/emergency services” – this shows that although very few photographers work in that sector, those that do receive a larger than expected proportion of their turnover from that sector, suggesting that those who work in that sector tend to specialise in it. This can be seen in the sectors “private individuals”, “other”, “military/police/emergency services” and “newspapers”.
- 10.4 Conversely, when the lines are close together, this indicates either that those photographers working in that sector tend not to specialise in that sector, or that fees from that sector is less profitable than others. This can be seen in the sectors “corporate/business”, “magazines”, and “PR”.
- 10.5 The largest single market sector was working for members of the public, with over 40% of photographers indicating that they worked in this sector. Of those photographers, the share of their turnover from this area was on average over 60%

11. In 2009, did any clients ask for copyright, and did you agree ?

Fig 11.1: In 2009, how many of your clients asked for copyright or an equivalent licence ?

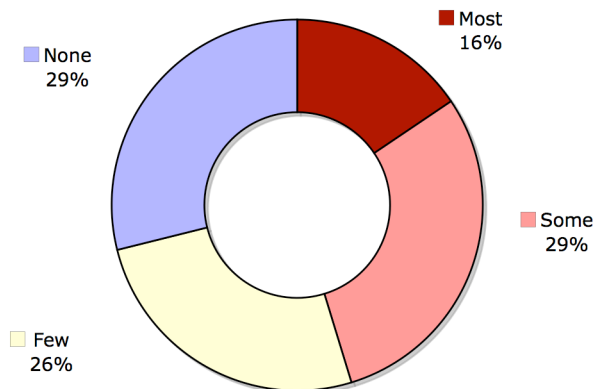
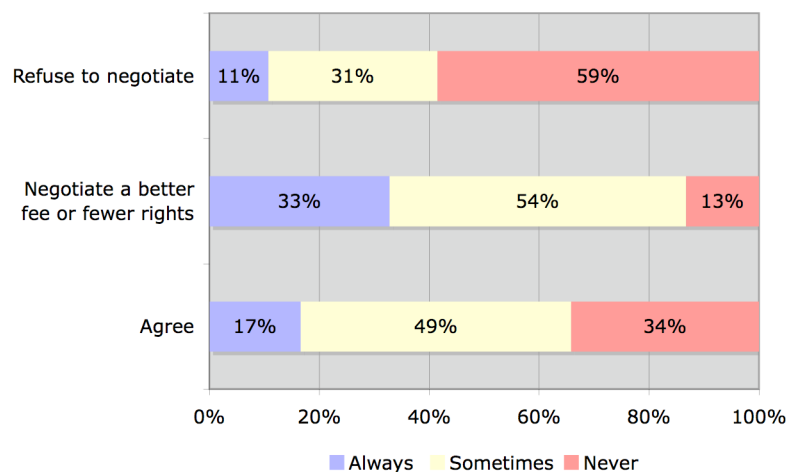


Fig 11.2: When asked this, how did you respond ?

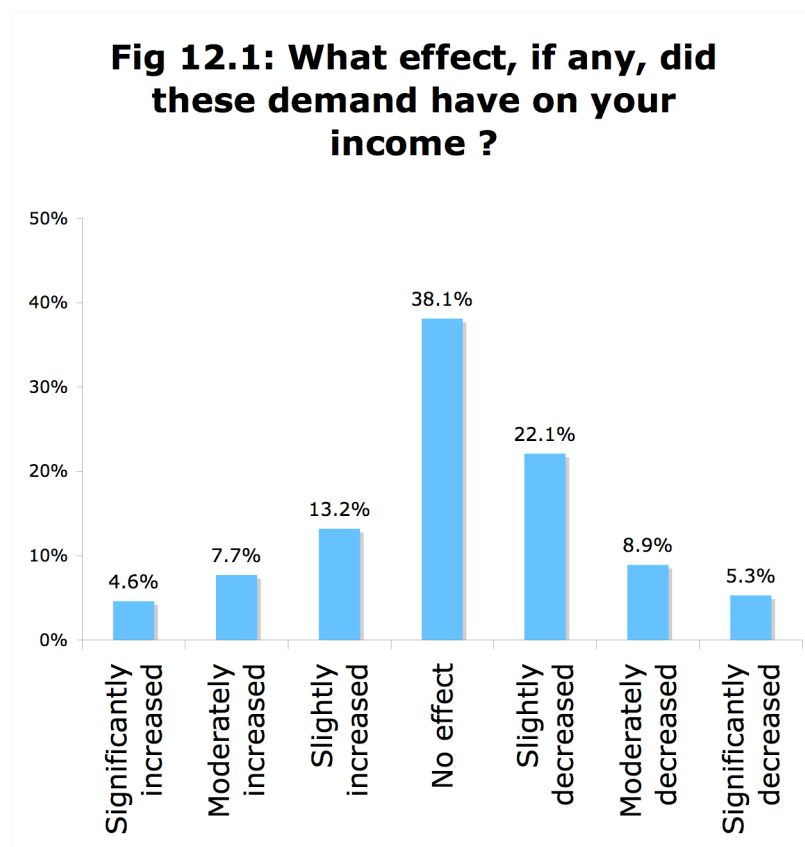




“A client expected copyright and I had to threaten to sue before he would pay me. Public perception of these issues is far from the perspective of the law and has no understanding of our industry. This perception is contributing to the increased inability to make a living from photography.”

- 11.1 In general under UK copyright legislation, any freelance photographer is the default copyright owner of any photograph they take. Normal industry standards are for freelance photographers to grant rights by licence to allow who can copy or reproduce their work, and where it can be reproduced. The main exception to this are staff photographers, where their employer is the default copyright holder.
- 11.2 Despite this, 71% of freelance respondents said that in 2009, at least one client attempted to acquire copyright (or its license equivalent) from them. During negotiations or discussions surround a commission or purchase.
- 11.3 The 2009 survey asked “Do you ever have clients seeking to acquire copyright or a license equivalent to copyright?”, to which 81% of respondents said that they had. It is difficult to draw meaningful comparisons between the two survey questions, because no equivalent time period was specified in last year’s survey, but the trend from the 2009 survey seems to be supported by the results of the 2010 survey.
- 11.4 When photographers were asked how they responded to these requests, 17% said they always agreed, (compared to 4.8% last year), The number who always refused to negotiate was the same in both years – 11.0%.

12. Did these demands affect your income ?





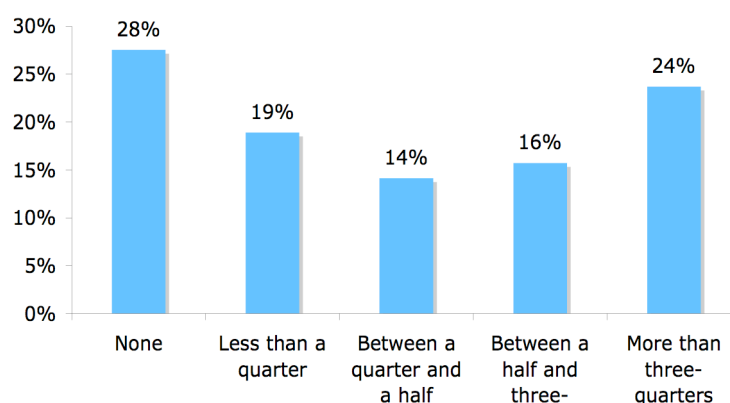
- 12.1 38.1% of photographers said that clients' demands for greater rights did not affect their income. This is comparable to last year's survey, in which 40.6% of photographers said the same.
- 12.2 The high percentage of photographers who said that these demands did not affect their income could be explained by a satisfactory outcome being reached for both parties during negotiations, or photographers choosing not to do business with clients who asked for copyright.
- 12.3 25.5% of photographers said that clients demands had ultimately increased their income, compared to 36.3% who said that their income had been adversely affected.

13. Do you normally give away copyright, and did any clients think they owned copyright by default ?

Fig 13.1: Do you normally give away copyright by default ?



Fig 13.2: In 2009, how many clients of yours believed they owned copyright by default ?





“We have arrived at a situation in this country where most peoples opinions of copyright is that is just a troublesome inconvenience - why should we have to pay when we can steal?”

“The general public believe that if they commission a photographer and they receive the files (eg - a wedding) that copyright is also given. There are many photographers who don't understand this! “

“Photographer's moral rights must be strengthened, metadata has to be irremovable, orphan works must never be considered beyond the needs of museums, libraries etc, the photographer (author) should be the only person who can give permission for an image to be reproduced and set reproduction fees not a third party. The 1988 copyright act should not be weakened.”

- 13.1 While the freelance is normally the copyright owner, allowing them to control who can copy or reproduce their work, a minority of freelance respondents – 11% - say that by default they pass this right to whoever commissions them, meaning they can no longer control or benefit financially from their work.
- 13.2 Anecdotally, a significant proportion of those who commission photographers have been under the impression that that they would automatically own copyright by the act of commissioning a photographer. The results of the survey indicate that in 2009, 72% of respondents encountered at least one such client, with 24% of respondents saying that this happened with more than three-quarters of clients
- 13.3 Freelance photographers who routinely keep their copyright earned on average 33.2% more than those who give their copyright away. Freelances who said they retained their copyright reported an average (mean) profit of £19,272, compared to an average (mean) profit of £14,471 for those who said that they gave it away by default. In addition, 21% of photographers who routinely gave away copyright reported either a loss or zero profit in 2009, compared to 16% of freelances reporting a loss overall.
- 13.4 The difference in profit between the two groups cannot be attributed to those who gave away copyright being younger or less experienced. Both groups had an average of 19.2 years working as a photographer.
- 13.5 72% of photographers said that in 2009, they encountered a client who was under the erroneous impression that by the act of a commissioning a photographer, the copyright belonged to the client.

14. In 2009 was pressure put on you to give a more extensive license, and if so, how ?

Fig 14.1: How often was pressure put on you to grant a more extensive license ?

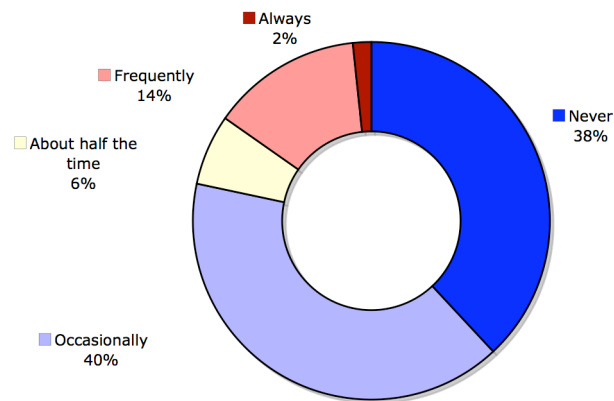
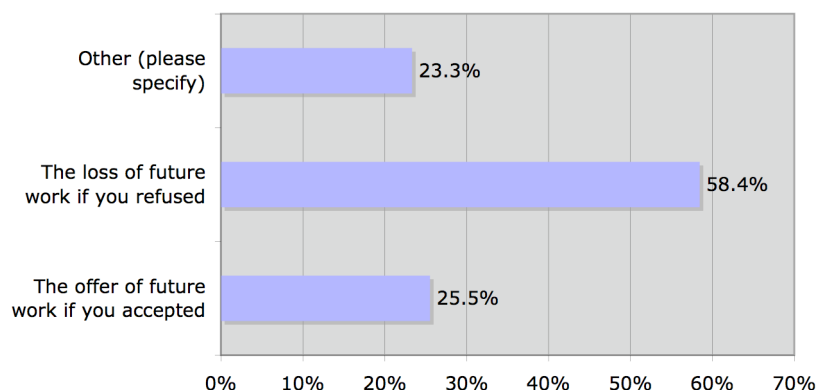


Fig 14.2: How was pressure put on you to give more extensive rights ?





“I didn't sign the BBC contract for their in-house magazine which requests copyright, so I haven't worked for them again.”

“Usually I explain implication of copyright hand-over and they relent on my assurance that they won't end up screwed. Most don't understand copyright but are under pressure to grab either by bosses or from ignorance.”

“Wrong question. How many potential clients do I never approach knowing they will ask for all rights? A very, very long list.”

- 14.1 62% of respondents said that in 2009 they had encountered pressure from clients to try to persuade them to give copyright or more extensive rights..
- 14.2 The 2009 industry survey asked a similar question, to which 93.2% of respondents said they had come under some kind of pressure in the previous year to grant a more extensive license. While it is possible that this fall in 2010 is due to a significant change in attitudes among those who commission or buy photography services, it is more likely that the widening of the British Photographic Council membership between the two surveys has widened and changed the types of photographers being surveyed.
- 14.3 However, the results for how pressure was applied remain consistent between the 2009 and 2010 surveys. In 2010, 58.4% of respondents said they were threatened with the loss of future work if they refused (compared to 60.8% in 2009) and 25.5% saying they were offered future work if they complied (compared to 23.3% in 2009)

15. From which industry sectors did you encounter pressure to give up more rights ?

Fig 15.1.: Industry sectors more likely to place pressure on photographers to give up more rights.

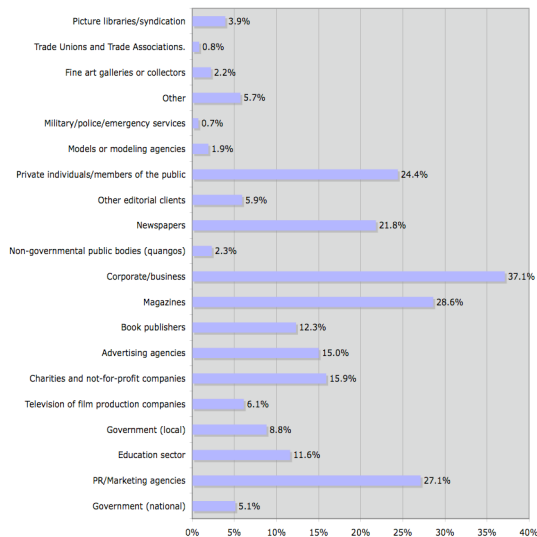
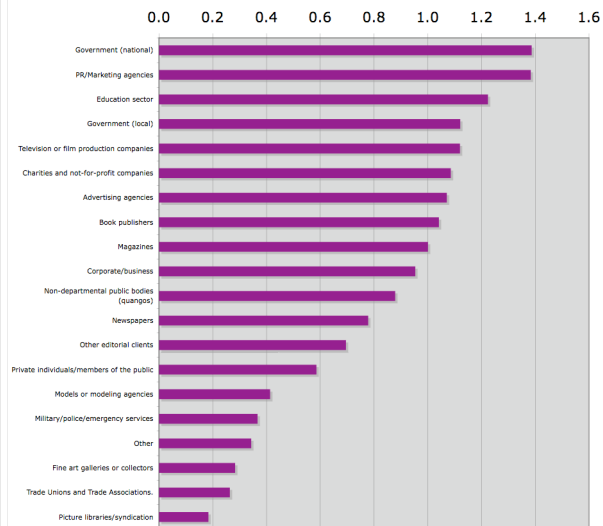


Fig 15.2: Industry sectors most likely to place pressure on photographers for more rights, adjusted for relative size of each sector

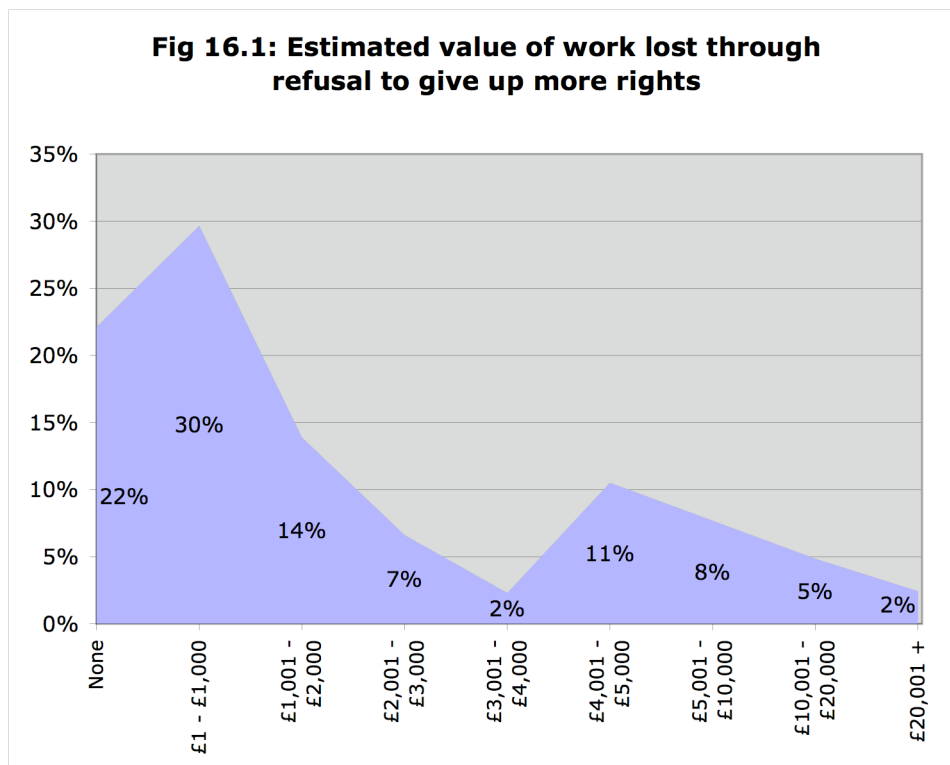




“I'm fortunate, that whilst based in the UK, most of my work is on locations overseas for reputable corporate clients who understand the concepts of copyright and licensing.”

- 15.1 Figure 15.1 shows the percentage of photographers who encountered pressure from each industry sector to give up more rights. However, when considering these statistics in figure 15.1, it is important to remember that they also reflected the number of photographers who work in each respective area.
- 15.2 Figure 15.2 shows the number of photographers reporting rights pressure from each sector, divided by the percentage of photographers who work in each sector. By doing this, the different industry sizes are ignored, and the proportion of photographers reporting pressure to give up more rights can be compared across sectors of different sizes.
- 15.3 In figure 15.2, higher numbers and longer bars represent a higher incidence of pressure to give up more rights. They show national government and PR/Marketing agencies to have the highest incidence of asking for more rights, and trades unions, picture libraries and fine art galleries to have the lowest incidence.

16. What is your estimated value of work lost because of a refusal to give up more rights for no extra fee ?





- 16.1 Those respondents who reported that they had been pressured into handing over more rights or a more extensive licence for no extra fee, were asked to put a figure on their loss. For example, 14% of photographers say that in 2009 they lost between £1,001 and £2,000 of revenue because of this.
- 16.2 The figures are indicative, and while useful should not be treated as too precise. This is because they firstly indicate an estimate, supplied from memory, and are an estimate of what the photographer would like to have been paid, rather than the figure they may have settled for, which may have been less.

17. How might the following pieces of hypothetical legislation affect your business ?

Fig 19.1 Expected effect of any Orphan Works legislation

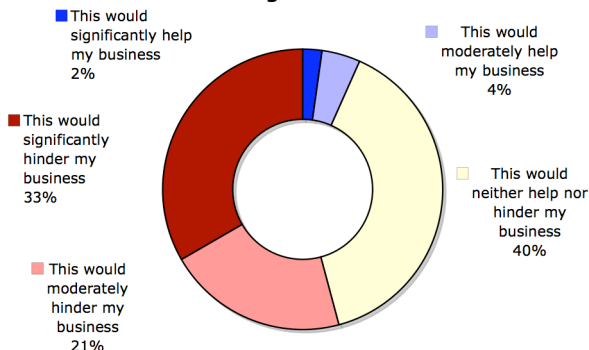


Fig 19.2: Expected effect of quicker and easier copyright claims procedures

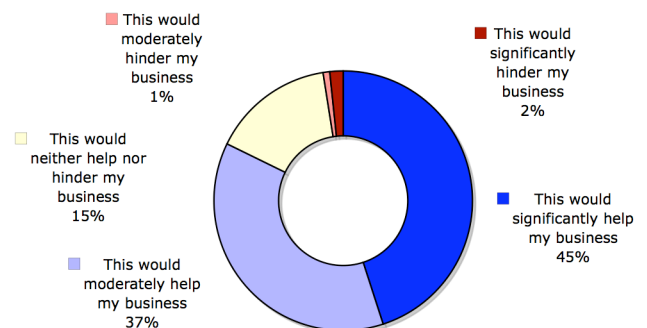


Fig 19.3: Expected effect of mandatory credits/bylines and penalties for their omission

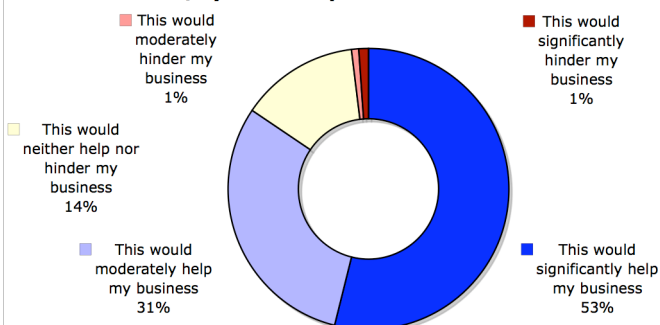
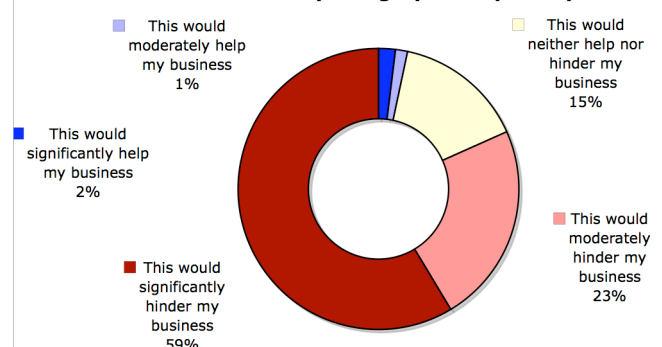


Fig 19.4: Expected effect of legislation making it more difficult to photograph in a public place





“The question of 'orphan works' is ridiculous. It would be terribly easy to separate an image from its author, thereby creating a free and open market that is open to abuse.”

- 17.1 In the pie charts opposite, a large quantity of blue indicates that freelance respondents considered that particular legislation would have a positive effect on their businesses. Conversely, a large quantity of red shades indicates general disapproval.
- 17.2 A little over half – 54% - of all respondents said that orphan works legislation – which would allow publication of in-copyright works without permission if the work’s author could not be found or traced – would adversely affect their businesses, compared to 6% who said it would help their businesses.
- 17.3 82% of respondents said quicker and easier copyright legislation would benefit their businesses.
- 17.4 84% of respondents were in favour of mandatory credits or bylines with penalties for their exclusion, with only 2% against. While existing UK legislation gives authors the moral right to be identified as the creator of their work, it has some exceptions – for example, for news reporting – and the right to a credit is effectively unenforceable.
- 17.5 In recent years, both professional and amateur photographers have encountered significant difficulties from police officers and private officials when attempting to photograph legally in a public place. 82% of freelance respondents said that legislation affecting the right to photograph in a public place would adversely affect their businesses.

18. In 2009, how often did you get a byline – and should it be mandatory ?

Fig 18.1: Proportion of publications in 2009 in which respondent's work was credited

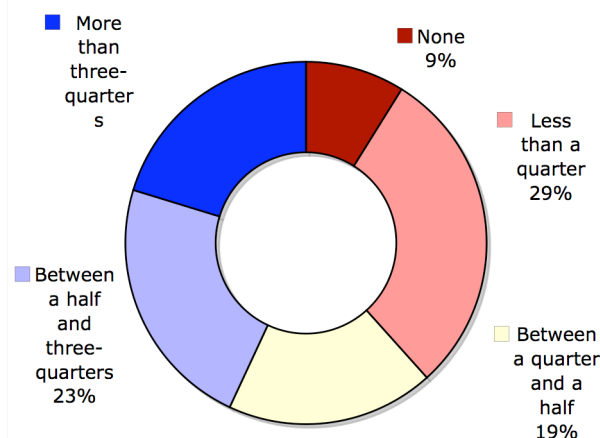
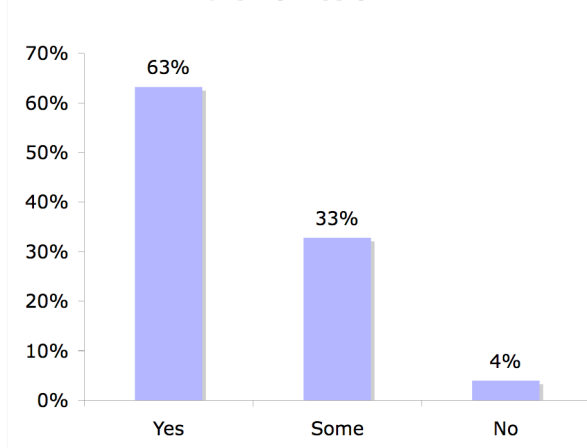


Fig 18.2: Should bylines be mandatory with proper penalties for their omission ?





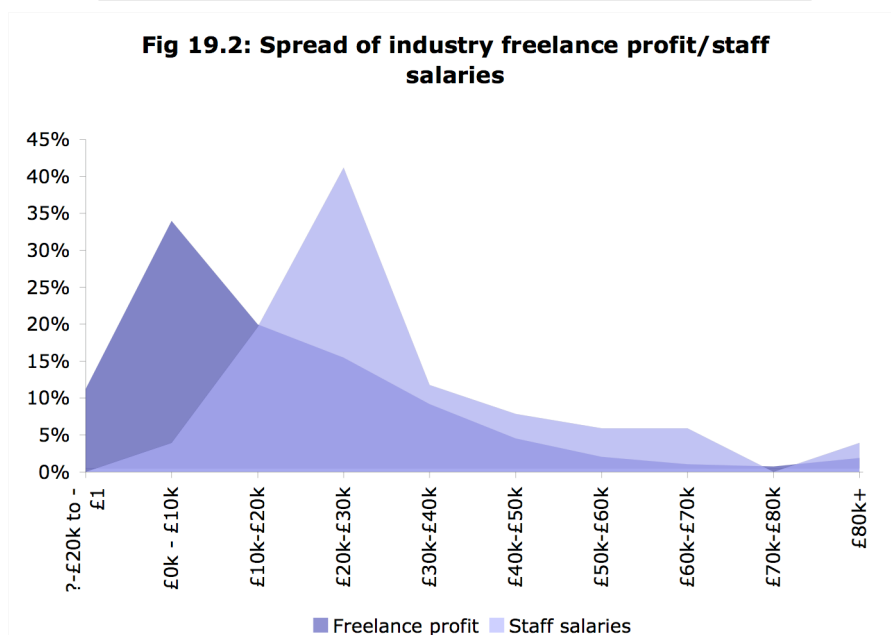
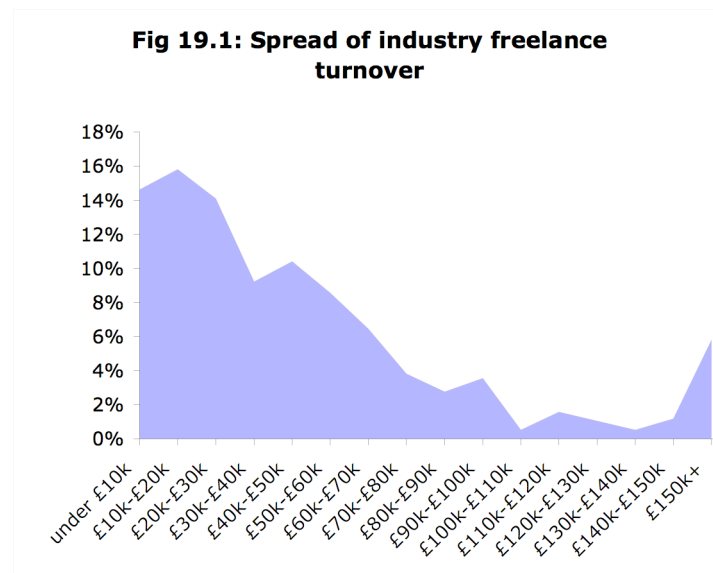
“The aspect of picture credits for me is a professional one. As a PR photographer with clients paying me - but providing genuine news for the magazines I supply, I feel that a credit is a professional requirement. Also, new clients have been known to see this and choose me to work for them because of it.

“Magazines and newspapers are the worst for not wanting to give the photographer a credit or payment.”

“I do a lot of work in Germany and France where every picture is credited to the author. Holland, where I also work, and the UK do not seem to do this and this puzzles me.”

- 18.1 As previously mentioned in paragraph 17.4, the right to a credit theoretically exists in UK copyright legislation, but with certain exemptions, and is in any case effectively unenforceable.
- 18.2 Only 20% of respondents said that they had been credited for their work in three-quarters or more of publications in 2009. 9% said that they were never credited during 2009.
- 18.3 The survey showed 63% of respondents were in favour of mandatory bylines with proper penalties for their omission, with a further third agreeing that bylines should be mandatory and enforceable in at least some circumstances.
- 18.4 The results shown in figure 18.2 reflect the findings of a similar question in the 2009 survey which showed 83% in favour of mandatory credits, with 7% against and 10% unsure.

19. In 2009, what was your turnover and profit/salary ?





“I am primarily a wedding photographer. With the increase in amateurs buying 'professional' DSLRs, many potential clients are touting the 'My friend has a good camera and is doing a college course - he'll do my photography as a favour' line...especially with the knock-on effects of the recession and possible job cuts.”

- 19.1 While the sample size shows strong trends for turnover, profits and salaries, the figures shown should be treated with caution.
- 19.2 By their nature, the figures supplied were by respondents were not independently verified. In addition, the time period involved – January to December 2009 – was one that was unlikely to overlap with any yearly freelance accounting period for tax purposes. The individual figures entered showed strong trending towards rounded figures of thousands or tens of thousands, suggesting approximate figures had been supplied from memory.
- 19.3 Given this survey section’s questions were optional, there is likely to be survey bias towards more successful photographers who may be more likely to be prepared to share their figures. For example, 8.7% of photographers who gave their turnover figures did not give their profit figures. 68% of staff photographers surveyed gave information about their salary.
- 19.4 The average (mean) freelance profit was £18,821, compared to a mean staff salary of £34,535. Only the top 19% of freelance respondents said they made a profit of £30,000 or more, compared to 35% of staff photographers who said they earned a salary of £30,000 or over.
- 19.5 Staff photographers reported generally higher salaries than freelances. 41% of staff said they were paid between £20,000 and £30,000, compared to only 15% of freelances recording profits in this band.
- 19.6 29% of freelance photographers said their profit was between £1 and £10,000. 16% of freelances who responded said they did not make a profit in 2009.
- 19.7 There is a clear and significant difference between profit and turnover figures for male and female photographers. The median turnover for female photographers was £25,000, with a median profit or salary of £10,000, and 24% of female photographers made either a loss or zero profit. The equivalent figures for male photographers was a turnover of £39,471 (58% higher), a median profit/salary of £15,000 (50% higher) and 13% making no profit in 2009 (46% lower).



20. How did your turnover change between 2008, 2009, and 2010 ?

Fig 20.1: respondents describe 2009 turnover compared to 2008 turnover

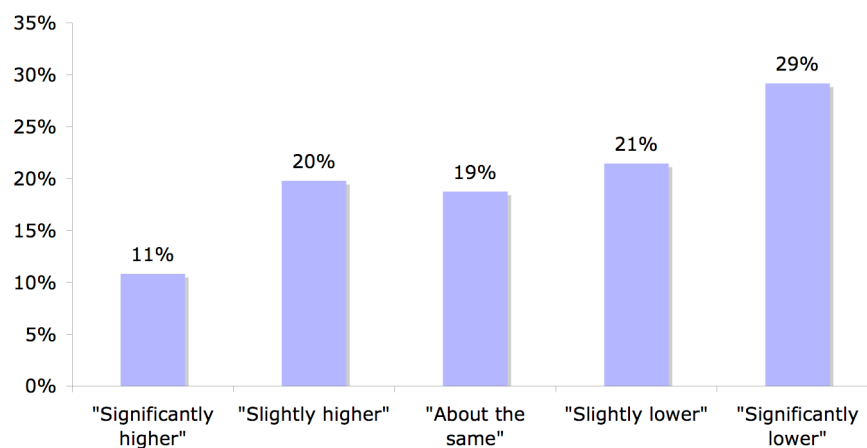
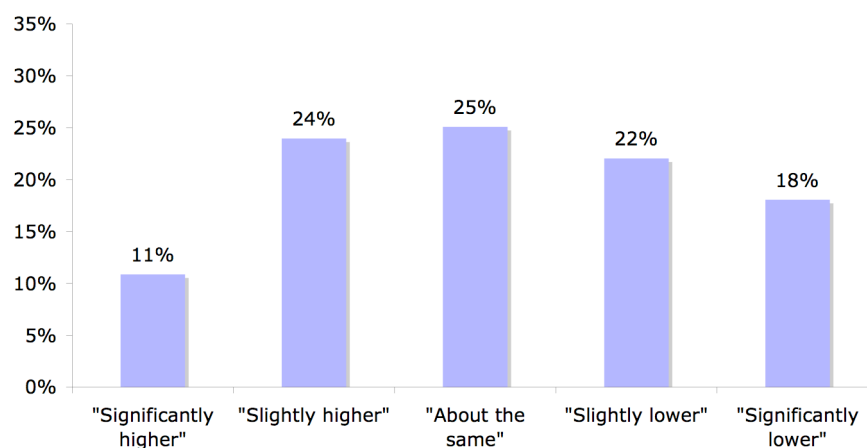


Fig 20.2: respondents describe their expectations for 2010 turnover compared to 2009 turnover





“Having been in this industry for almost 8 years, I have seen massive changes in what the customers want and a reduction in the demand for work. I am concentrating on staying in business and building good relationships with customers so I can retain them. “

“With everyone owning a camera of some sorts, most people do not recognise the skill required in producing a good picture. I can see photography as a profession slowly dying - apart from a few customers who do appreciate quality and are prepared to pay for it.”

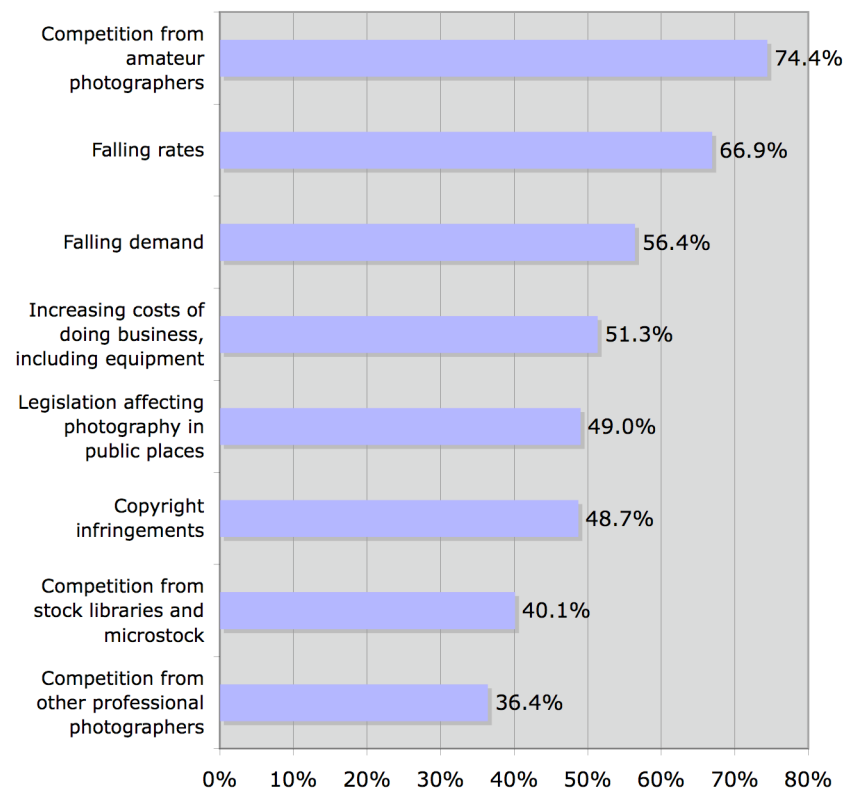
“I feel this next six months is critical to my survival, have been a successful photographer for 10 years...but now competition is so fierce and prices on the slide it's getting very hard to see its worthwhile continuing as a full time photographer.”

- 20.1 When they were asked in this year's survey what the actual effect was from 2008 to 2009, 31% reported an increase in turnover, 19% said they years were roughly the same, and 50% said that turnover had fallen.
- 20.2 In last year's survey, respondents were asked whether they expected their turnover to increase, decrease or stay the same in 2009 compared to 2008. Their predictions were generally more pessimistic than the actual outcome, with 21% of those from last year's survey expecting growth in 2009 (against 31% this year who said they actually experienced growth). However, the 47% who expected turnover to fall was comparable with the 50% who actually experienced a fall.
- 20.3 Predictions for 2010 were generally more optimistic than those made a year ago for 2009, with 35% expecting turnover to rise (compared with 21% a year ago) and 40% expecting turnover to fall (compared with 47% a year ago)
- 20.4 Female photographers were generally more optimistic about the prospects for 2010, with 39% expecting their turnover to increase, compared to 32% of male photographers.



21. What are the threats to your business ?

Fig 21.1: Which of the following do you consider a threat to your business ?





**“The mystique is gone with digital, the amateurs go un
taxed, uninsured and
unregulated. We have
Fensa for double glazing,
we have Corgi for gas and
plumbing but an owner of a
digital camera is not a
wedding photographer and
goes unregulated.”**

**“Whilst I believe that there
should be significantly
more control over the bank
of photographers known as
paparazzi I feel that it has
to be done in such a way
that we do not take it too
far and incur general
suppression of freedom of
the individual to take a
spontaneous image in a
public place.”**

**“The industry as a whole is
over subscribed, too many
good photographer chasing
too little quality work, and
undermined by amateurs
or semi pro's working
cheap and producing little
more than snaps”**

- 21.1 Twice as many respondents considered amateur photographers a threat compared to other professional photographers. Many respondents elaborated on this in the comments, blaming clients who placed price above quality, and that amateur photographers could charge lower prices due to lower overhead costs or being subsidised by income from other occupations.
- 21.2 Only 16% of staff photographers considered other professional photographers to be a threat to their livelihood, but 77% of staff photographers considered amateur photographers to be a threat.
- 21.3 The second and third most prevalent worries for photographers were falling market rates and falling demand for their services with 67% and 56% of photographers reporting these respectively.
- 21.4 Around half of respondents said that the cost of doing business, copyright infringements, and legislation affecting photography in public places threatened their businesses.

22. How many infringements of your work are you aware of?

Fig 22.1: Are you aware of any copyright infringements of your work in the last three years ?

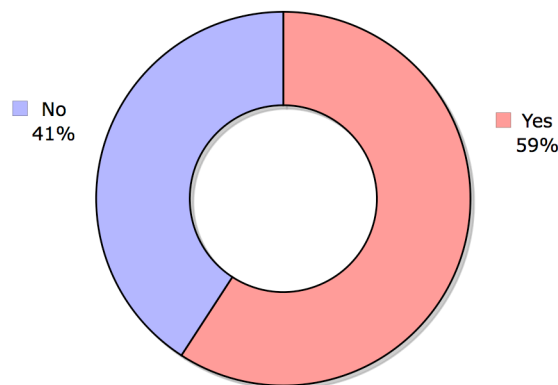
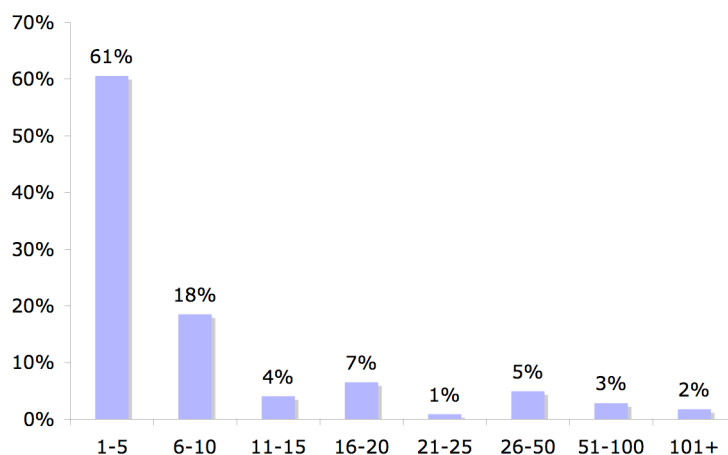


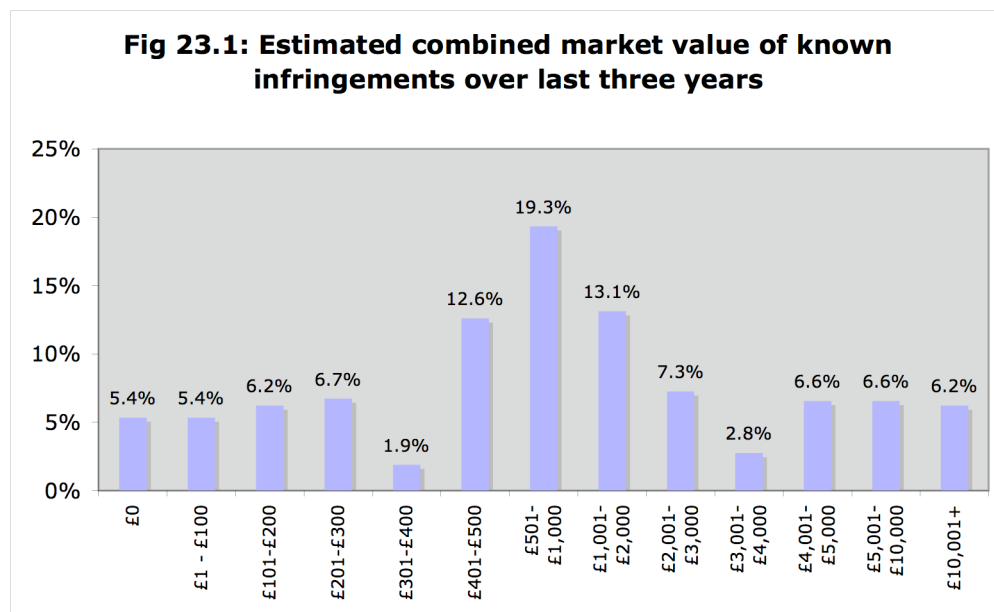
Fig 22.2: Distribution of known infringements within the last three years





- 22.1 Three out of every five respondents reported that they were aware of at least one copyright infringement of their work in the previous three years. When the same question in last year's survey was asked, 72% of respondents said they were aware of at least one copyright infringement in the previous three years.
- 22.2 Overall, of those who were aware of infringements of their work, the average (mean) figure was 20.8 known infringements per photographer. (This figure discounts one exceptionally high response of 7million, which would have otherwise skewed the average to 12,110 . This would be unrepresentative as it would make the average higher than all but one of the responses).
- 22.3 61% of respondents who said they had come across infringements of their work in the preceding three years said they were aware of between 1 and 5 infringements. 10% of respondents said they were aware of over 26 infringements.

23. What is your estimate of the market value of these infringements ?

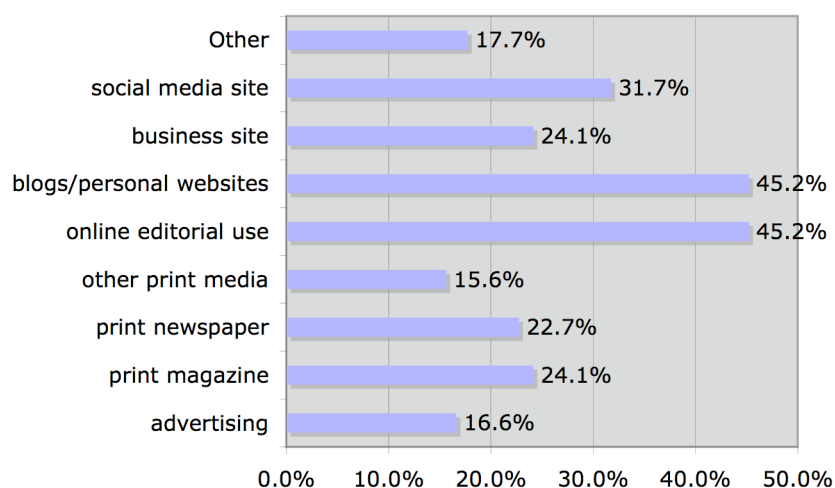




- 23.1 Figures shown are for the estimated combined market value of all known infringements for each respondent over the last three years. When considering these figures, the same caveats apply as were mentioned in paragraph 16.2
- 23.2 The total reported figure for all known infringements was £2,087,376 – an average of £ 3,605 per photographer.
- 23.3 Almost half - 45% - of respondents had total infringements which were estimated at between £401 and £2000.

24. Where did you discover copyright infringements ?

Fig 24.1: Where copyright infringements were discovered





“Newspapers, especially in Ireland are the worst offenders for copyright infringement. If you supply an image, they think they can use it at will. If you don't see it in the publication you are none the wiser.”

- 24.1 A significant number of infringements were discovered on the internet. It is difficult to know whether to what extent this reflects increased copyright infringement on the internet, or whether it reflects the ease of detection of the infringement.
- 24.2 While blogs and personal, non-commercial websites are often anecdotally considered to be the source of most infringements, an identical number of respondents said they had discovered infringements on editorial websites.

25. Did you pursue these infringements, and if not, why not ?

Fig 25.1: Did you pursue these infringements ?

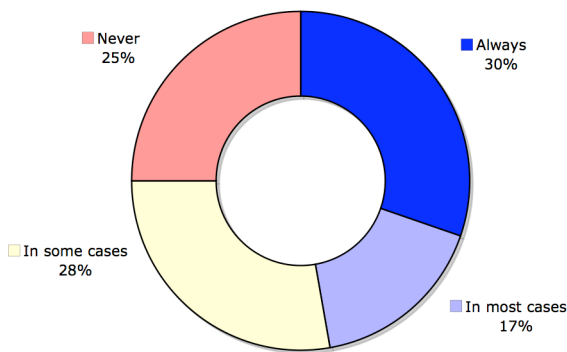


Fig 25.2: What stopped you pursuing infringements ?

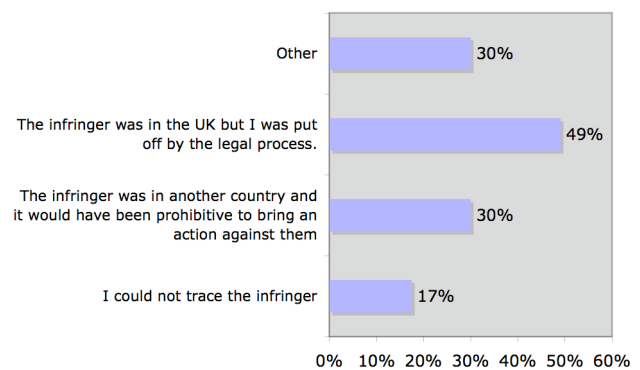
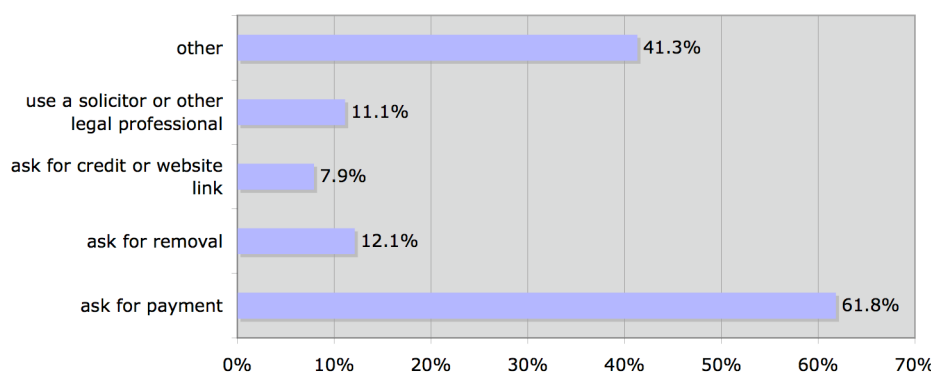


Fig 25.3: How did you pursue infringements ?





- 25.1 Only 30% of photographers who became aware of infringements always pursued them, with a quarter saying that they did not pursue any known infringements.
- 25.2 Of those photographers who did not pursue all of their infringements, half said the UK legal process was too difficult, 30% saying that the infringer was in a different jurisdiction, and 17% claiming the infringer could not be traced.
- 25.3 The most common way in which infringements were pursued was to ask for payment for the infringing use.

26. What did you recover for the infringements, and were you happy with the outcome ?

Fig 26.1: When you asked for payment, what was the average settlement ?

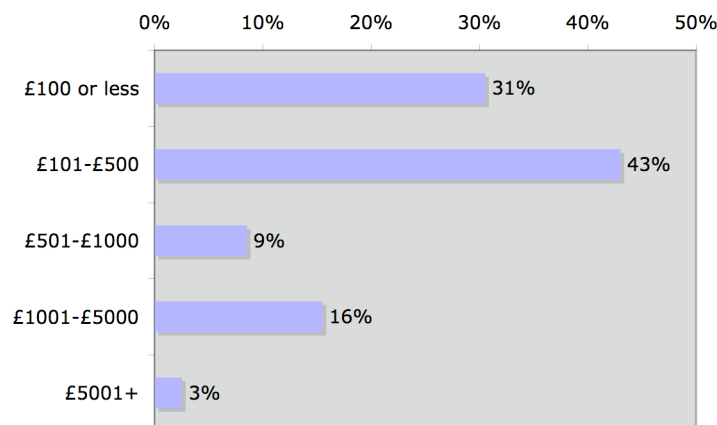
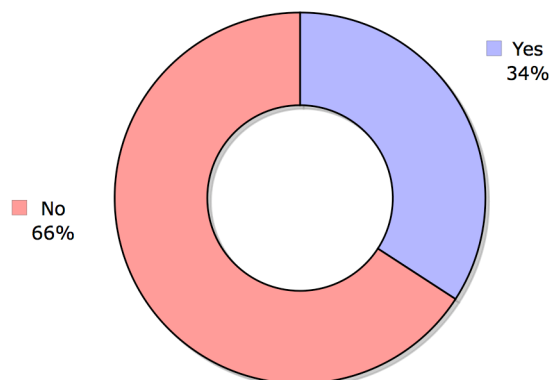


Fig 26.2: When infringements were pursued, were you happy with the outcome ?

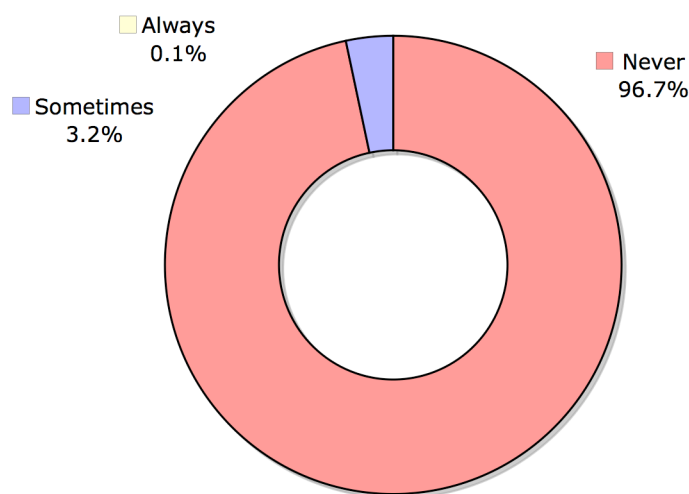




- 26.1 Of those photographers who received a financial settlement, 74% of the settlements were for £500 or below.
- 26.2 In general, copyright claims in the UK can only be for the market value of the infringement, and damages are rarely awarded, particularly if the claim is pursued as a debt through the Small Claims Court. As a result, the time taken to prepare and pursue the claim are not normally compensated. This can affect the decision by a photographer whether to pursue infringements, especially if the value of the infringing use is low.
- 26.3 Only a third of those who received a financial settlement were satisfied with this outcome.

27. Do you register your images with the US copyright office ?

Fig 27.1: Do you register images with the US Copyright Office





- 27.1 In the UK there is no action required for copyright registration. All photographs become copyright at the point of creation, either to the creator or to the creator's employer (if photographs were taken as part of their employment).
- 27.2 While the same principle broadly applies in the United States of America, a higher level of damages is available when pursuing infringements if the images have previously been filed with the US Copyright Office. In practice, this creates a two-tier copyright system, with many legal firms unwilling to take on copyright infringement cases for unregistered images because of the lower damages available.
- 27.3 Photographers outside the US can choose to also register their images with the US Copyright Office in case their images are infringed there. However, the overwhelming majority of UK photographers – 97% - never file their images with the US Copyright Office.