Annual Survey of Art Buyers
Stock Image Licensing
2016
Many thanks to our sponsors:
This year we asked our creative pros to self-identify company type.

• “Ad & Design” includes web designers, agencies large and small, and independent designers.

• “Other” includes education and non-profits.
96% of respondents use stock imagery in their work. Creative pros tell us that stock is critical to their success. They need more and better choices.

89% say they are part of a team which makes the final image selections.
Stock Images & Creative Pros

• Stock remains an important tool for creatives
• 53% said they use stock in more than half of their projects
• 32% use stock in 75 - 100% of their projects
• 53% license more than 100 images or clips per year
• 47% of respondents work with both stills & motion
• The love/hate relationship with stock is softening
• 63% say their use of stock will NOT increase next year
• Quality remains the top driver for image selection, yet..
• 74% say they sometimes must sacrifice quality for price
Key Findings in 2016

• 58% of those responding say they license RF content more than any other
  • Only 11% license RM more than any other
• 74% said quality is number 1, equal to those saying they must sometimes sacrifice quality for price
• Advertisers have long been more reluctant to buy subscriptions, however today 60% have at least one
• Publishers are more likely to have multiple subscriptions at this time, than advertisers or corporate clients.
• 57% of publishers use stock in at least 75% of projects
• Ad/design clients take longer to find images.
• 57% of ad/design respondents license both stills and motion
• Only 12% of publishing respondents license both
Use of Stock

Do you expect your use of stock photography to increase in the coming year?

- Yes 37%
- No 63%

Do you expect your use of stock motion to increase in the coming year?

- Yes 58%
- No 42%

• The rapid increase in the use of stock photos appears to be slowing - 37% of respondents say their use of stock will increase next year. This is down from 53% in 2015.

• The number of creative pros who believe their use of stock motion will increase, is up to 58% from 39% in 2015.

License Preferences
Which license types do you purchase?*

- Rights Managed 63%
- Royalty Free 90%
- Microstock 58%
- Free 32%

*All license types were defined to minimize confusion.

• Traditional Royalty Free has dominated as the favorite license type 3 years in a row. 90% of creative pros license traditional RF, slightly up from 2015.

• 63% of creative pros continue to license RM. This is up from 58% in 2015.

• 58% of creative pros license microstock, as in 2015.

• The number of creative pros using free images is down from 41% in 2015 to 32%.

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• More and more creative pros say they license RF more than any other - 58% in 2016 versus 34% in 2015.

• While the number of creative pros licensing RM has increased (to 63%), the number of those licensing RM the most is down to 11% in 2016 from 25% in 2015.
## Use by License Type

### For which projects do you mainly use MICROSTOCK?

<table>
<thead>
<tr>
<th>Category</th>
<th>Digital (mobile, 47%)</th>
<th>Print</th>
<th>Video/TV</th>
<th>Display</th>
<th>Packaging</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital</td>
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<td>37%</td>
<td>11%</td>
<td>5%</td>
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<tr>
<td>Print</td>
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<td>37%</td>
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<td>Video/TV</td>
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<td>Packaging</td>
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### For which projects do you mainly use ROYALTY FREE?

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<th>Category</th>
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<th>Video/TV</th>
<th>Display</th>
<th>Packaging</th>
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</thead>
<tbody>
<tr>
<td>Digital</td>
<td>37%</td>
<td>30%</td>
<td>12%</td>
<td>12%</td>
<td>9%</td>
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<tr>
<td>Print</td>
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<td>30%</td>
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<td>Video/TV</td>
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<td>Packaging</td>
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<td>9%</td>
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</table>

### For which projects do you mainly use RIGHTS MANAGED?

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<th>Video/TV</th>
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<th>Packaging</th>
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</thead>
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<tr>
<td>Digital</td>
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<td>8%</td>
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<td>7%</td>
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<tr>
<td>Print</td>
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<td>50%</td>
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<tr>
<td>Video/TV</td>
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<td>Packaging</td>
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<td>7%</td>
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</table>

### For which projects do you mainly use FREE?

<table>
<thead>
<tr>
<th>Category</th>
<th>Digital</th>
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<th>Video/TV</th>
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<tbody>
<tr>
<td>Digital</td>
<td>56%</td>
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<tr>
<td>Print</td>
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<td>33%</td>
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<td>Video/TV</td>
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<td>11%</td>
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<td>Display</td>
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<td>Packaging</td>
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<td>0%</td>
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Buyers continue to say that quality is the most important driver of the purchasing decision - and by a wide margin. However, 74% say they sometimes have to sacrifice quality for price. Price remains 2nd. In-Perpetuity rights moved to the 3rd spot from 4th in 2015.

Those unwilling to sacrifice quality for price is down to 21% from 26% in 2015.
Subscriptions

While Clients say subscriptions are not an important purchase factor, they have embraced them:

• Advertisers and “Other” (Ed and Non-Profit) are somewhat more resistant to using subscriptions
  • 39% of advertisers do not use subscription images
  • 43% use 50% or more images from subscriptions
  • 35% of “other” do not use subscriptions images
  • 48% say they use 50% of more from subscriptions

• Publishers have embraced subscriptions
  • 14% do not use subscriptions images
  • 76% say they use 50% or more from subscriptions

• Corporate buyers have embraced subscriptions
  • 24% do not use subscriptions images
  • 76% say they use 50% or more from subscriptions
Subscriptions

Do you have subscriptions?
- No: 37%
- Yes: 63%

Do you have more than 1 subscription?
- No: 47%
- Yes: 53%

If not, why not?
- Too Restrictive: 50%
- Can't Charge Client: 33%
- Other: 17%

What % of the images you use are from subscriptions?
- Publishers
- Advertisers
- Corporate
- Other

0  =>25  =>50%  =>75%  100%
People & lifestyle content continues to be the most in demand. “People” also drive business, medical/health, and sports/leisure. Business/Industry moved to the number 2 spot from 3 in 2015. Buyers comment that they are looking for contemporary, authentic shots of people. Additionally, buyers want subject matter shot well in a fresh, contemporary and authentic way.
68.4% of respondents say support is at least somewhat “important.” Clients prefer to license content without having to contact sales. However, when they need sales support, it is key. They want to be able to access support easily and quickly.
Art Buyers & Motion

96% of respondents say they use stock. We looked at the use of both stills and motion. While less than half use both, those that do are using it in more and more projects.

- 47% of respondents say they license both stills and motion. This is down from last year. One reason may be the growth in respondents which may have shifted the user mix.
- Corporate and Ad/Design users are more likely to license both
- Of those using motion, 100% say they use it in at least 25% of their projects.
- 44% of those using motion use it in 50% or more of their projects.

Are you using more mixed media today than in previous years?

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<tr>
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<th>Yes</th>
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<tbody>
<tr>
<td>45%</td>
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Each year we ask two questions to get a sense of brand awareness and top or favorite destinations. The first question is open-ended. A respondent can answer with as many names as they like. The second question asks each respondent to name their favorite, go-to, first-stop agency.
Getty and Shutterstock swapped spots this year. Pond5 came in #5 and they were not on the list in 2015. There was a shift this year with companies moving up (Photoshelter, DMLA, and Aurora, for example) or getting on the list for the first time (Pond5, Dissolve and Science Photo Library). And, a few dropped off (Blend, Bing, Imagebrief). Note “Other” came in #4;
The top 3 spots remain the same as 2015. The field narrowed from previous years with only 10 companies being named. National Geographic made the list for the first time, as did Science Photo Library.
“Clear out the old images. And, we see too many of the same images.”

“Ease of electronic tools is fantastic. But my favorite agencies are the ones that know me personally. Although the industry is changing, keep the personal feel. The largest agencies (one in particular that is no more :-) ) don't seem to get that.”

“There is a TON of competition so find ways to make it EASY for the buyers, offer something special, stay competitive.”

“more variety”

“FYI...everyone under 30 years of age DOES NOT have a beard.”

“I would like a much wider selection on Getty subscription. Also better filters, for instance eliminating hots with celebrities”

“Making searching images easier.”

“I’ll say it again, quality over quantity.”

“Need more real images.”

“Better photo metatags-keyword searching.”

“Better options for research help.”

“Better content in RF. Real authentic in nature.”

“Make sure your sales people understand the business.”

“I need a wider selection of global people.”

“Don’t email me so much!”

“I can’t believe how many agencies have the same images. STOP.”

“Move beyond the stereotypical things when showing people.”

“Throw out the posed images.”

“We mostly use royalty free but we need better options. Seems like the same content is everywhere. We look for unique resources.”

“We use a lot of nature, sports, environmental shots. Need more good options”

“My use is a bit unique in the industry. My favorite agencies are the ones that I have had a long standing relationship with, some over 20 years. However, that relationship is contingent on my sales rep. If my rep doesn't know me, my pricing suffers, and I go to another agency. I hate it when an agencies continues to flip my from one account rep to another. I love it when my account rep doesn't change and I can develop a relationship with them. I have spent 28 years in the procurement business, the last 20 in image/footage acquisition. I have never seen a business so tied into a good rep/customer relationship.”
VisualSteam is a marketing and sales services organization that specializes in visual content markets. We work with producers, creators, and distributors to help them better understand and respond to market needs, and define strategies for expansion and execution. We also work with clients/image consumers and content marketers to help them acquire and manage visual content.