





# 26TH ANNUAL STOCK VISUAL SURVEY

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## Stock's Image Climbs to New Heights

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BY GORDON KAYE

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GDUSA has been conducting a stock visual reader survey for 26 rotations around the sun, 20 of which I have been editor. In this time, we have watched stock visuals as a creative resource progress from marginal to mainstream to indispensable. And now the image of stock among designers has caught up with the reality, as grudging acceptance gives way to a warm embrace. That crucial change in attitude is one of the ten points I will take away from our 2012 poll.

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POINT 1.

## Stock Use is at an All-Time High

As a practical matter, stock visual usage is at an all-time, record-breaking, once-unimaginable level. Nearly every designer uses stock visuals in his or her work, and it is not unusual to utilize several images in a project and hundreds over the course of a year. To put specific numbers to these generalities: 98% of creatives report using stock imagery on the job, triple the figure from our first survey back in 1986. In addition, a record 70% of respondents use stock imagery more than 20 times during the course of a year, and one-in-three report using stock more than 100 times. Both these figures represent significant increases from even a year or two ago. As for nay-sayers, only 2% of respondents state that they absolutely do not use stock in any way, shape or form.

Do you or others in your company use stock visuals in your work?

STOCK PHOTOS . . . . .	98%
STOCK ILLUSTRATION . . . . .	72%
STOCK FOOTAGE . . . . .	33%
STOCK AUDIO . . . . .	14%
NEVER USE STOCK . . . . .	2%

How many times during the year do you use stock visuals in your work?

1-5 . . . . .	7%
6-10 . . . . .	10%
11-20 . . . . .	13%
21-50 . . . . .	20%
50-99 . . . . .	19%
100+ . . . . .	31%

Do you use stock imagery in your work?

1986 . . . . .	34%
1990 . . . . .	62%
1995 . . . . .	77%
2000 . . . . .	79%
2005 . . . . .	92%
2010 . . . . .	95%
2012 . . . . .	98%

Do you use stock more than 20 times a year?

2000 . . . . .	18%
2005 . . . . .	39%
2010 . . . . .	54%
2012 . . . . .	70%

## POINT 2.

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# Designers See Stock as a Necessary Good

## WHY IS EVERYBODY DOING IT?

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Stock visual usage is burgeoning because its central value proposition — choice, accessibility, convenience, affordability — dovetails perfectly with the tight budgets, the short turnarounds, the challenging assignments, the multiple media, the demanding clients and the digital workflow that now shape the graphic design business. For good or ill, there has rarely been such a close convergence of a product or service and its times, and that is why the supply and the demand for stock imagery has increased exponentially. The result: an abundance of choices at a broad spectrum of prices delivered by an increasingly fluid and responsive infrastructure. This is a new reality and with it has come a change in attitude. As one respondent put it, stock use is a necessary good, not a necessary evil. As cynical as designers can sometimes be, they increasingly appreciate the role of stock elements and the contribution of stock providers.

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“Over the past 5 years or so stock photography websites have improved dramatically mostly with the quality and breadth of the collections. Search functions have also improved.”

“For me to be able to see so much, so fast, allows the concepting process to happen on the fly and keeps projects moving faster.”

“There have been improvements in depth and breath. I often use stock as basis of my own imagery. It is great for idea generation and using to clarify ideas to clients at relatively low cost, then generating custom visuals.”

“Not only is stock imagery better, the access and ease of search makes stock a first selection over assignment photography.”

“I once viewed stock as a necessary evil. Now I see it as a ‘necessary good’ that helps me meet my clients’ needs and keep my design business going.”

“Yes, photography is vastly better now and there is much more local content. Also the pricing has come down considerably.”

“Stock options are so much better today. In the beginning of my career, there were stock houses with film either purchased or checked out. We had a personal rep that would assist in searching for images that were stored in notebooks and file cabinets. Ha! So much better today. It’s better today in all aspects.”

“The selection of stock images have seemed to quadruple over the past 5 years.”

“The choices, content, accessibility, price and technology all seem the same and relevant to today’s standards.”

“The quality of the stock imagery has gotten much better. In terms of both relevance and technical quality.”

“The content these days is better and the search is easier. I would say it enhances work flow alot as it reduces the search time. And pictures can be easily downloaded and used quickly. Very convenient. And I would say that there are alot more choices both in terms of pictures as well as the libraries, compared to say, 15 years ago when I just started out in graphic design.”

“Much better in terms of matching concepts with images than in the past. Search terms used to be limiting, now they are limitless.”

“I appreciate the great search features — search by orientation, color, search similar images, etc. A great search means I spend less time looking.”

“Much better online selection in regards to quality and variety especially in the royalty free area.”

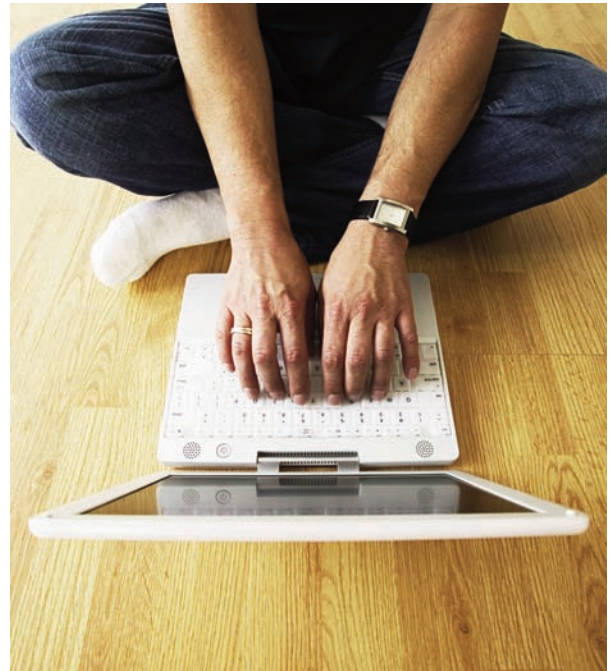
“Compared to the availability and prices of 10+ years ago the current selections are much better. The photo quality themselves are relative. The images we used a decade ago seemed effective but looking back now look dated. I imagine in another 10 years these images will suffer from the same.”

“Stock photos are more accessible because their price per image is lower and there are more sites available which sell the images. When print was the dominant medium, stock house could sell just really high res images, but in today’s mobile and internet mediums, graphic artists are looking for a lower price point. Stock photography providers have been delivering value.”

## POINT 3.

# For Some Designers, The Strength is Also the Weakness

For some designers, the abundance and accessibility of stock images is a weakness as well as a strength. The concern comes in three varieties. The one we'll deal with right now is that there may be too much material to be properly curated or edited or searched. A particular concern: stock providers are not aggressive at weeding out the old, outdated, amateurish, mediocre and overused. The two other related concerns — lack of exclusivity and a potential blunting of the creative edge — are addressed later in the report.



“Stock providers should just make sure they are constantly adding new content and removing some of the images that are dated, especially in the technology and business images.”

“If an image has rarely been downloaded, remove it. There is a reason no one wants it and the ‘garbage’ clutters up searches.”

“Choice, price and accessibility/technology are better. I like to be able to do my own searches online. The drawback is that there is too much bad content to sludge through.”

“Stock is more diverse. I don't know if that makes it better. I have to wade through a lot of crap, but overall, it seems like there's more, and better, options.”

“While the images have become more diverse, I somehow see the same images used again and again.”

“There seems to be more imagery available; however I'm not sure it is necessarily better. With so many sites out there where any photographer can upload their work, it becomes mixed in with real quality photography.”

“Stock has improved in accessibility and price, but the quality has suffered. Too many amateur images to shuffle through.”

“Stock websites should remove overly used/downloaded images.”

“What we're running into now is that a lot of the larger sites are absorbing the smaller ones, so the total pool of new/different images is starting to shrink.”

“It would be nice if the images on microstock sites weren't on all microstock sites. If I do not find what I am looking for on one site, I move on to another, but usually have to look through a lot of the same images.”

“Today's stock is better at the higher end of the spectrum, but also, there are a lot of ‘marginal’ images out there that looks like out-takes.”

“Stock imagery is easier to access, but there is a lot more garbage to wade through.”

“What I see today is not necessarily better than it has been in the past, but it is much cheaper and more accessible. The process of finding the right image is much easier ... but that works for all designers ... making stock imagery less of a differentiator in the design.”

## POINT 4.

# Stock Use is Expanding by Subject and Media



Designers today work in and across multiple media. Not surprisingly, they license stock in and across multiple media as well. Print remains the number one medium for which our readers' stock image licensing. But, of course, stock elements for online design are soaring, with more than three-quarters of respondents report having licensed to that end as well. It goes without saying that two rising uses for stock imagery — interactive design and mobile devices — were the stuff of science fiction when our surveys first began. As for what subjects designers require, the perennials — people, business, and lifestyle — remain at the top of the heap. But many more categories are now in demand; for example, medical/healthcare and multicultural/ethnic images have vaulted into the top half dozen most popular categories. And, of course, even within the perennials, there is more range than ever before.

For which types of media do you license stock imagery?

PRINT . . . . .	96%
INTERNET . . . . .	76%
PACKAGE/POP . . . . .	51%
SIGN/EXHIBIT/ENVIRONMENT . . . . .	48%
TV/FILM/VIDEO . . . . .	18%
MOBILE . . . . .	13%

What subjects/categories do you use most frequently?

(TOP 20 IN ORDER OF FREQUENCY)

- PEOPLE
- BUSINESS/INDUSTRY
- CONCEPTS/BACKGROUNDS
- LIFESTYLE
- MEDICAL/HEALTHCARE
- MULTICULTURAL/ETHNIC
- SCIENCE/TECHNOLOGY
- FOOD/BEVERAGE
- BEAUTY/HEALTH
- HOLIDAYS/CELEBRATIONS
- TRAVEL/TRANSPORTATION
- FINE ART
- HISTORICAL/VINTAGE
- ANIMALS/PETS
- BABIES/CHILDREN
- SPORTS/GAMES/FITNESS
- MUSIC/ENTERTAINMENT
- HOMES/INTERIORS
- RELIGIOUS/SPIRITUAL
- SPACE/MILITARY

## POINT 5.

# Designers Control the Decision Making Process

Given the importance of stock imagery in the creative and budgetary process, it is no surprise that designers want to control the decision as to the image and the method of license. And, indeed, nine-in-ten designers claim to do so. One interesting development is that, with stock visuals so accessible, clients are increasingly checking out collections as well. Down the road this may pose a threat to control. As for why designers turn to a particular stock provider or website, the reasons are timeless: a mix of price, quality, selection, and convenience. No surprises here.

Main reasons for your selection of a stock provider or stock website?  
(TOP 10 IN ORDER OF FREQUENCY)

- AFFORDABLE PRICES
- QUALITY OF COLLECTIONS
- EASE OF SEARCH
- FRESHNESS OF IMAGES
- BREADTH OF FILES
- EXCLUSIVE CONTENT
- ADVANCED SITE FEATURES
- INCLUDES A CREATIVE COMMUNITY
- COLLEAGUE RECOMMENDATION
- BOSS RECOMMENDATION

How many stock sites do you regularly use?

1 .....	14%
2-3 .....	37%
4-5 .....	41%
6+ .....	6%





POINT 6.

## Designers Run to Royalty Free

Over the years, and to this day, there is a legitimate debate over the relative advantages of royalty free and rights managed imagery. But this is no longer truly a fair fight. Royalty free licensing in its many forms has come to dominate the creative marketplace. The reasons are transparent. Royalty free possesses many of the traditional advantages of rights managed stock but with even greater ease and affordability, a reduced potential for hassle over price or usage rights; and continued improvements in the choice and quality of content. Not that rights managed use has disappeared, nearly one-third of respondents used that method even in the moment of exceptional economic duress. But almost all of those who availed themselves of rights managed licensing also used royalty free during the year.

In the past year have you licensed . . . ?

ROYALTY FREE . . . . . 98%  
 RIGHTS MANAGED . . . . . 32%

What is your role in the licensing or purchasing process?

SOLE/PRIMARY DECISIONMAKER . . . . 91%  
 VERY LITTLE SAY . . . . . 7%  
 NO SAY . . . . . 2%



## POINT 7.

# Pushing the Value Proposition Further

If the key to popularity is quick, easy and inexpensive imagery, two recent variations on the royalty free model achieve this. On steroids. Micropayment sites, which allow content creators and users to engage in small money transactions, are now used by nearly two-thirds of designers. Similarly, subscription sites, which offer multiple downloads for a set fee, have been adopted by more than half of the respondents. Neither method was envisioned two or three decades ago but, in truth, the two models are exquisitely calibrated to this moment in time. For good or ill, they are pushing the value proposition of stock toward its logical conclusion.

In the past year have you purchased or licensed from a micropayment site?

67% YES

In the past year have you purchased or licensed a stock subscription?

54% YES

“Today, it is easier to find inexpensive, reliable stock imagery. I imagine that the advent of microstock and crowd-sourced imagery has not been easy on the livelihoods of ... photographers, but the greater availability of inexpensive photos has been a huge help to small businesses like mine.”

“The strength of a subscription is that I have instant access to hi-res images for anything I would need. Blue skies for fixing exterior photos, textures of every kind for enhancing designs and a rich assortment of people pics to choose from.”

“Strength of micropayment sites: Flexible file size and pricing options. Weakness: I could say variety, but they have come such a long way in recent years.”

“Strengths of micropayment and subscription sites? You can get a lot of images for reasonable prices. With subscription sites, the quality and breadth of images is less.”

“Both have advantages. Micropayment are easier to manage and to present costs. Subscription sites eliminate the need for employees to request credit cards.”

“Micropayment and subscription sites have the strengths of ease of use and low cost, of course. I work for a small in-house design department, we don't have a lot of money to spend on images. So these are great for us.”

“I prefer subscription services so that I do not have to constantly go to my boss or client for approval to purchase images as needed. Micropayment sites are convenient but you get what you pay for.”

“I have always had a subscription service which allows me to do my job without having to constantly request purchasing funds for individual images.”

“Subscription sites are great if you're committed to that site for the long-term. Micropayment is wonderful for those times when you just need that special image and don't want to use that stock site all the time.”

“Micropayment sites offer a wide selection, but images often follow predictable trends. Not as easy to be surprised by breakout images.”

“Subscriptions allow you to purchase items as needed rather than waiting for approval on monies for an individual image.”

“Subscription sites are great because everything is in one place, you don't have to pay each time you purchase a photo, you can download multiple photos. I see no weaknesses.”

“A subscription keeps you locked into using on a site and stops the graphic artist from ‘oversearching’ and killing time on many sites in quest for the perfect image. Also, by buying in bulk with a subscription, the stock photo house can offer a discount. Who doesn't want to save money?”

“Subscription and micropayment sites are great for low budget projects and quick turnaround times.”

## POINT 8.

# There is Still Room for Excellence and Exclusivity



As noted above, for some designers the very strength of stock is also its weakness. Though the survey, thus far, has largely celebrated quantity, many designers remind us that they are also committed to quality imagery that is original and distinctive, unique and evocative. Indeed, several comments note the dark side of the mass consumption of stock imagery: that the same image can appear in a competitor's communications; that oft-used images can get stale and lose their impact; and that such easy access to prepared images discourages creative and innovative design solutions. This may explain why there remains a notable loyalty for rights managed stock and an abiding respect for its conceptual cousin, the specialized or niche stock collection that offers depth and expertise. There is clearly still room at the higher end for excellence and exclusivity.

"Photo shoots are expensive and unless absolutely necessary to sell a certain product it just makes more sense to utilize stock. Higher end markets will always want exclusive images and specialty collections."

"There is still room for specialized collections in higher end markets, where it is important to focus and to stand out. Medical, fashion, food, etc. Fighting for value is getting harder so price is a problem.

"It is important to differentiate businesses with unique design, content and imagery."

"There's room for more specialty collections, sure. Especially medical. I use a lot of medical images and always find it tough to seek out just the right image for the job."

"If I know a site specializes in my industry, I will pay more for quality and convenience."

"Some clients have the need, and the history, to desire and pay for high quality, exclusive imagery. There are fewer of them, but they still exist."

"I'm sure for those with the budget a higher priced exclusive image will always be desirable."

"Premium-priced royalty free images is a godsend."

"Exclusivity is important but only in very specific markets. Food, fashion, retail... Standard, everyday businesses can't afford the exclusivity."

"There is always room for higher quality specialty subject matter. I'm not a big fan of exclusivity, though."

"Because the market is so inundated with poor quality stock photography and super low prices, I believe the 'space' for higher quality photography skips stock photography and moves back to hiring photographers for custom, quality shoots."



## POINT 9.

# Designers Desire More Diversity

Diversity, or lack thereof, is the one major area where creatives continue to push back and express dissatisfaction with the marketplace. There is a backstory here. Blandness, staginess, upper-middle class and WASP culture were the historic earmarks of early stock offerings. Over the years and in so many ways, the situation has changed for the better. General interest agencies have done a praiseworthy job of adding reality and edginess to their collections, and special interest providers, such as LGBT and multicultural collections, have entered the market. Still, the survey comments suggest that stock providers may not be keeping up fast enough with the sweeping changes that capture the essence of the diverse and increasingly multicultural demographics of America today.



“For the most part stock has gotten better. Especially in terms of price. However, most stock houses are very white, meaning there is a very large lack of other races in mainstream photos. For example, I did a search recently for yoga and found nearly only skinny, young, white women doing yoga. A few skinny, young white men as well. Very, very few older, Black, Asian, Hispanic, heavier folks.”

“Give us photos of ‘real’ people. All colors, all ages, all weights.”

“I look through thousands of images on stock photo sites. My work is severely limited because of the uniformity of the images. Too many happy shiney people looking into the camera.”

“More non-stereotypical multicultural images would be very helpful. For example, an image of an Indian or Pakistani girl doing everyday things: being on the phone, using a computer,

chatting with classmates, watering a plant, reading a book, etc., rather than posing in a sari or performing a traditional dance.”

“Don’t use the same family for every scenario. Offer more African-Americans in non-ghetto environments.”

“There is still a lack of racial and economic diversity.”

“Stock agencies should accelerate the additions to their libraries, and concentrate on multicultural images, images of an aging population and healthcare images. These are all hot topics going forward.”

“I need images that don’t look like a model in a costume. Especially when I am searching for ‘mature’ or ‘ethnic business person’.”

“Use fewer ‘staged’ images of people in situations, be aware of diversity in race, gender and age within the same image.”

“Lack of diversity in a single subject is the weakness. For example, I will see the same senior people pictures in a lot of boomer advertising.”

“There needs to be more of a variety of religious stock images available.”

“I still feel like I find a lot of ‘corny’ looking, posed photos, which I never use.”

“Limit the outdated lifestyle shots. Some work when looking for retro but others just look like outdated styles.”

“I find almost zero decent agriculture photos either, and the photos I do find are fine if you’re trying to just find a ‘pretty farm’ photo. But if you need something that’s technically correct, there is a limited range available.”

“Keep providing beautiful, creative and compelling images that keep up with life and style as it evolves and changes.”

## POINT 10.

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# Designers Are Savvy About Stock

Designers know what they want. We found that out when we asked what they would like their stock providers to improve upon to provide better service. Many responses are thoughtful and interesting and, we think, worth passing along. They tend to revolve around more robust search features, engaging in more dynamic and flexible pricing, and fostering better communications between photographers and designers.

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“It would be helpful to publish customer surveys to find out what type of theme or genre you most often use, and then push email marketing campaigns that match your criteria.”

“I would like to see a bigger choice of rights managed licensing options maybe — mostly for our nonprofit or low-profit client projects.”

“Update often, and include a feature that would tell you when images that you have used in the past year, have come in that might better serve your needs now. Like a cookie or an app update. If I purchased a certain image, that info would be retained, and if a newer image came in that fit the criteria of that image, I would be updated on it.”

“Provide better details for search or educate us how to better search on your site. Each site descriptors are different, how search words are assigned to photos, etc.”

“Provide well-lit, candid style shots in large files sizes. Provide a series of stock shots with same talent/environment (three or more) that can be used in a print or web piece that will provide image continuity.”

“Once a subscription is purchased, websites could be faster and more user-friendly. It takes too long to access and download from my current lightbox. Perhaps a ‘Members Only’ site could be

built with better lightbox access and faster speeds.”

“Do stock providers let photographers know what people are searching for? So many times I get back zero results. If I’m looking shouldn’t someone be shooting it to fit the need?”

“Develop a wider range of prices for quality photos. If I’m going to use an image on 50 invitations that will be tossed away, I shouldn’t pay the same price as a 6 month billboard tens of thousands will see.”

“Offer a wider variety of images. I love the idea of being able to request specific images and having someone post the image. Maybe the person could bid on it — say ‘I need a photo with this and this, and I can pay \$25 (or XX credits.)’”

“How about developing a custom photography/illustration model, perhaps some sort of ‘on demand’ system?”

“There should be cheaper, special, better (annual) deals for graphic design firms.”

“Better search results including different phrasing such as ‘man’ or ‘adult male’, which should pull the same results.”

“Give a nice large preview image on hover. Most times, I can see if I want to add it to my lightbox or purchase it from the preview.”

“Lower the prices for those who aren’t corporations and agencies, and can’t afford ‘big’ prices to make good art and advertising.”

“Make it easier to narrow down a search, by use of ‘not’ in the keywords or as an additional field.”

“I am an instructor at a University and our graphics students are taught to obey copyright restrictions, but they also have limited funds. I would like to see a ‘student price’ offered.”

“Provide license options for small-run commercial uses for resale! The extended commercial license at most stock providers is way too expensive for manufacturers wanting to print only 1-15 shirts using the same stock graphic. It’s 2012 and now everything is custom and even small runs are manufactured economically. This is a large new up-and-coming market for stock graphics! Stock providers need to get with the times!”

“Give me more options in terms of credit packages. They always offer the packages at a number of credits that don’t correspond to the general number of credits that it costs for an image. So, you end up with more credits than you need, but not enough to buy more. Annoying!”