
Prepared for:



Getty/Shutterstock Merger: Stock content survey

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1 Introduction

Background, methodology and sample approach

Background

DJS Research (DJS) was commissioned to conduct a survey to assist the CMA's inquiry into the anticipated acquisition by Getty Images Holdings Inc (Getty) of Shutterstock Inc (Shutterstock).

The research covered by this report focused on surveying a random sample of those who had purchased, and/or downloaded stock content (images or videos) from the Parties in the last six to twelve months, covering four customer groups (strata) as explained below.

Methodology

A mixed-mode survey was conducted based on customer lists provided by Getty and Shutterstock (the 'Parties'). The survey was designed primarily for online completion, where survey invitations were sent by email. There was an option to boost responses via CATI (Computer-Assisted Telephone Interviewing) if required. The online survey was around 10 minutes in length, with the subsidiary CATI interviews around 15 minutes in length. A £25 voucher or charity donation was offered to incentivise participation.

The CMA requested UK customer lists from the Parties, based on the following criteria:

- Had a UK address
- Made a purchase or download in the last 12 months

Sample source and sampling

Customers were divided into four strata, two for each Party. Getty was divided by brand (Getty Images, iStock), and Shutterstock was divided by type of customer. Shutterstock has two different sales channels (Business Solutions and Marketplace). Business Solutions generally caters to large customers, such as marketing departments and media and broadcasting companies. Marketplace caters to individuals and small and medium businesses.

Shutterstock also provided a customer sample for those who had made a purchase and/or downloaded from Pond5 (a brand owned by Shutterstock). However, this was not used under instruction from the CMA, due to the limited customer sample available, and Pond5 representing a limited portion of Shutterstock's overall activity in stock content.

The sample included multiple users for some organisations, so where there was more than one user in an organisation, this organisation would have had a higher chance of having a user in the selected sample.

Fieldwork procedure

Email invitations were issued in December, with several reminders sent throughout the fieldwork period (16th December 2025 – 23rd January 2026).

Nearly all responses were achieved online via email invitations (96%). While monitoring response rates throughout fieldwork, it became clear that in order to meet the targeted 5% response rate, a follow-up with a sample of customers was required. The survey was adapted so that it could be completed via telephone.

Most customers in the sample had a telephone number. However, there were fewer telephone numbers available for customers in the sample for Shutterstock Marketplace, and therefore some additional telephone numbers were sourced (via desk research using publicly available sources) in order to boost responses, as this stratum had the lowest response rate online.

DJS Research's telephone unit called some customers who had received the email invitation, but had not yet participated in the survey. Customers could complete the survey over the phone, or be sent another invitation to complete online after being prompted on the phone. Most respondents who were



called completed the survey on the phone, with just one respondent completing online after being prompted by the telephone call.

Incentives

A £25 incentive was offered for completion of the survey. This could be in the form of a voucher (GiftPay) or a charity donation to one of three charities ([Trees for Cities](#), [Red Cross](#), or [Create](#)). The charity donation option was included in order to boost response rates from businesses, as based on research experience, some organisations do not allow individuals to accept incentives themselves.



Cognitive testing

Overview

DJS worked with the CMA to finalise the questionnaire. The questionnaire was cognitively tested. The cognitive testing comprised sending out email invitations to a random sample of respondents (500 in total, equally divided per strata), asking them to complete the online survey and take part in a follow-up telephone call to provide feedback on the survey. Nine cognitive interviews were conducted, which covered feedback on the email invitation itself, but mostly focused on the terminology and comprehension of the survey to ensure questions were clear and straightforward for respondents to answer. No problems were uncovered with the survey during the cognitive interviews, and only minor adjustments were made for clarity.

Another key focus of the cognitive interviews was to understand whether respondents felt able to answer on behalf of their organisation (as commercial users of stock content were asked to answer in this way during the survey).

During the cognitive testing, a batch of invitations was sent out with a £40 incentive to see if this increased response rates. However, there was no difference in the response rate, so the incentive remained at £25 for the main fieldwork period.

Sample breakdown and response rate

Issued sample & respondents

A random sampling approach was used from customer lists provided by the Parties. Calculations based on the response rate from the cognitive interviews were used to estimate that 2,800 email invitations per stratum should be issued for the main stage of surveying, in order to achieve around 120 responses per stratum. In total, 11,200 email invitations were sent out.

The sample was randomly drawn. For three of the strata, we restricted invitations to those who **purchased/downloaded content in the last six months**. The exception was Shutterstock Marketplace, where the sample was smaller, and the timeframe for purchases or downloads was extended to the last 12 months.

Response rate

Overall, the aim was to reach a minimum 5% response rate per stratum. The response rate is calculated as the number of completed surveys divided by the number of survey invitations issued to eligible customers. The proportion of eligible customers is estimated¹ as the proportion of all customers who started the survey and were not screened out. Email invitations for which an undelivered notification was received were not included in the denominator of the response rate calculation, as the customers had no opportunity to participate in the survey.

¹ Eligibility is not known for respondents who did not start the survey.



Table 1: Response rate calculation

Status	Strata			
	Getty Images	iStock	Shutterstock (M)	Shutterstock (B)
Emails issued	2,800	2,800	2,800	2,800
<i>Of which</i>				
Emails not delivered	113	144	136	96
Not started survey	2,375	2,469	2,470	2,414
Began survey – dropped out <i>(assumed eligible)</i>	100	45	46	100
Screened out <i>(ineligible)</i>	86	15	31	64
Completed (eligible)	126	127	117	126
Calculations				
Those who took part <i>(dropped out + screened out + completed)</i>	312	187	194	290
Estimated number of eligibles* <i>(dropped out + completed)</i>	226	172	163	226
Eligibility rate <i>(estimated number of eligibles/ those who took part)</i>	72%	92%	84%	78%
Assumed eligible <i>(dropped out + completed + not started questionnaire*eligibility rate)</i>	1,946	2,443	2,238	2,107
Response rate <i>(completed/those assumed eligible)</i>	6.5%	5.2%	5.2%	6.0%

*Eligibility is estimated as it is not possible to know whether respondents were eligible if they began the survey but did not complete or screen out

Analysis

Data charts and figures throughout this report have been split into four strata (Getty Images, iStock, Shutterstock Business Solutions and Shutterstock Marketplace). Percentages in some charts may not appear to add up to 100% due to rounding (for single response questions).

There may be a slight mode effect (where the mode of completion (telephone or online) may impact respondents' answers), as those completing the survey on the telephone did not see all the options for some questions, unlike those who completed online. However, as the proportion of respondents who completed the survey on the phone is small (4%), this impact is likely to be negligible.

The main differences between the CATI and online versions are listed below. The CATI and online questionnaires are available in the Appendix.

- A decision was made not to read out response options for questions with long answer lists, as doing so would lengthen the survey and negatively impact response rates.
- To mitigate potential mode effects, the response scale order was reversed for 50% of CATI respondents (i.e. "very positive" presented first versus "very negative").
- 'Don't know' option was not read out throughout



Where <BRAND> is used, this refers to the sample brand (Getty Images, iStock or Shutterstock). For the two strata within the Shutterstock brand, acronyms are used throughout to save space on charts:

- Shutterstock (M)=Shutterstock Marketplace
- Shutterstock (B)=Shutterstock Business Solutions

In this report, 'respondents' refers to survey participants, while 'customers' is used when describing results by stratum.

Screening questions and demographics

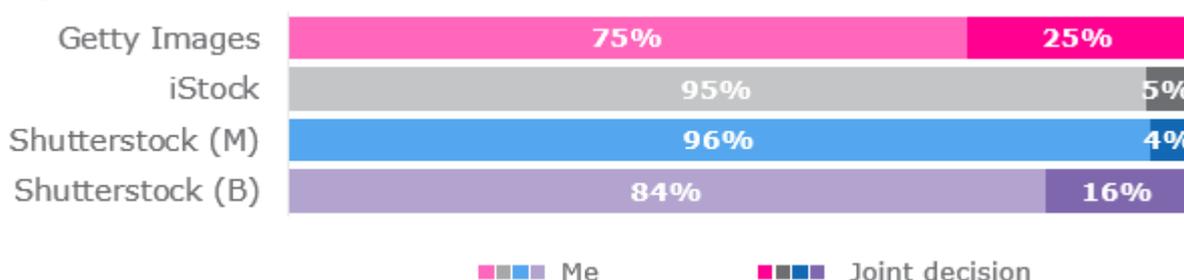
Screening questions

Respondents were asked several questions to determine if they qualified for the survey. To qualify, respondents must have made a purchase/download from <BRAND> in the last twelve months for use in the UK, and they must have been involved in the decision to use the supplier (either solely or a joint decision with someone else). Respondents were then asked to think about their most recent purchase when answering the survey.

Who took the lead on decision to use <BRAND>

Respondents were asked who took the lead on the decision to use the sample brand, whether it was themselves, a joint decision or someone else. If 'someone else' was selected, the respondent was screened out. In the majority of cases, the respondent made the decision to use their supplier on their own, particularly amongst iStock and Shutterstock Marketplace customers.

Figure 1: Who took the lead on the decision to use <BRAND>?



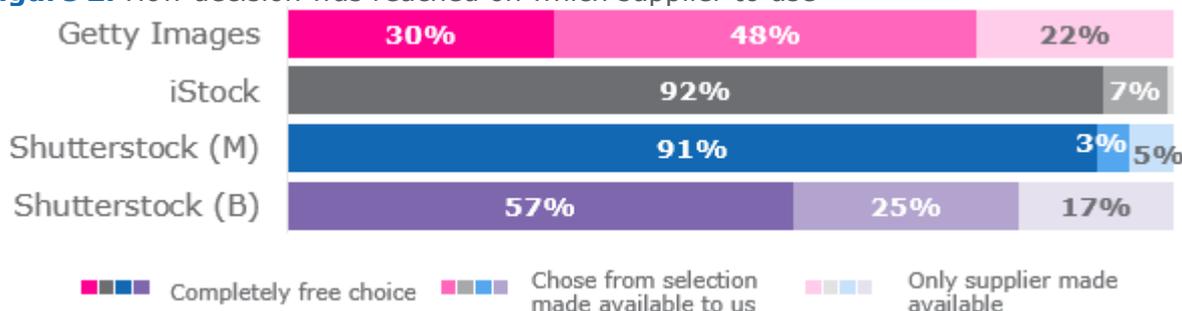
Source: S06. Who would you say took the lead on the decision to use <BRAND> on this occasion? **Base:** all respondents. Getty Images (n=126), iStock (n=127), Shutterstock Marketplace (n=117), Shutterstock Business Solutions (n=126).

Decision process for choice of supplier

To understand the decision-making process and how much free choice respondents had when selecting a supplier, respondents were asked whether they had a totally free choice, chose from suppliers made available to them by their organisation, or if they only had one supplier made available to them, in which case they were involved in the decision to use that single supplier.

For iStock and Shutterstock Marketplace, nine in ten customers had a completely free choice of which supplier to use; this was around six in ten for Shutterstock Business Solutions customers. However, Getty Images customers were more likely to have chosen a supplier from a selection made available to them by their organisation.

Figure 2: How decision was reached on which supplier to use



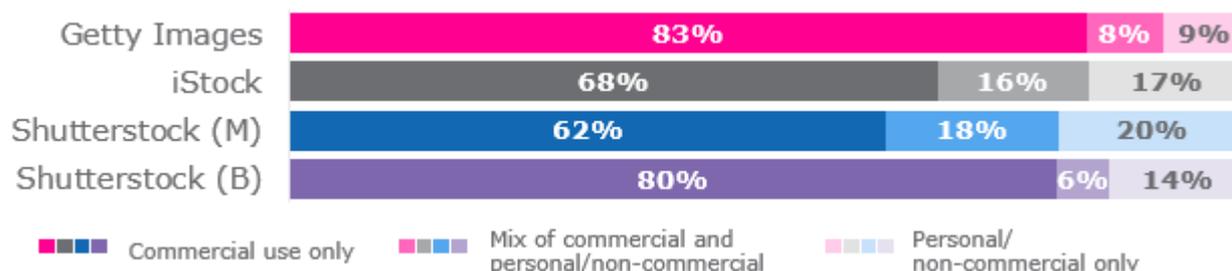


Source: S07. Which of the following statements best describes how you reached the decision to use <BRAND> for image or video content on this occasion? **Base:** all respondents. Getty Images (n=126), iStock (n=127), Shutterstock Marketplace (n=117), Shutterstock Business Solutions (n=126).

Commercial versus personal use

Respondents were asked whether the content they purchased or downloaded was for commercial, personal (non-commercial) purposes, or a mixture. Commercial use only was most common, particularly for Getty Images and Shutterstock Business Solutions customers (around eight in ten).

Figure 3: Commercial versus personal use

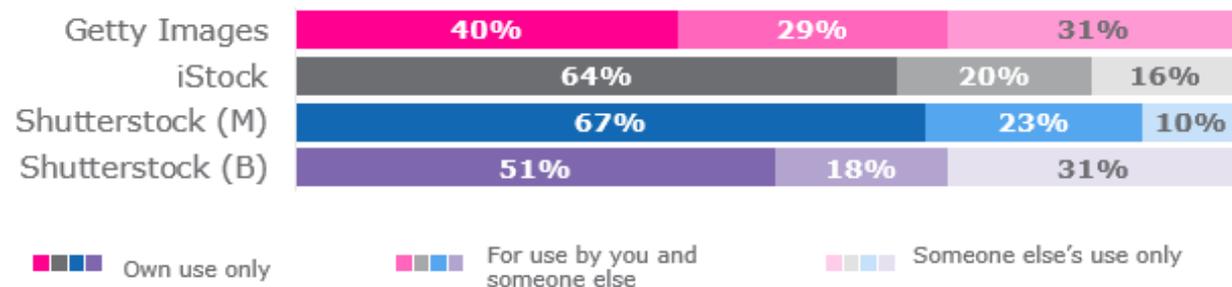


Source: S05. In the last 12 months, has the image or video content you've purchased/downloaded from <BRAND> been for...? **Base:** all respondents. Getty Images (n=126), iStock (n=127), Shutterstock Marketplace (n=117), Shutterstock Business Solutions (n=126).

Purchasing/downloading for your own use versus someone else

Respondents were asked whether their last purchase or download was solely for their own use only, for someone else's use only, or for use by 'you and someone else'. Results were mixed; for iStock and Shutterstock Marketplace customers, around two-thirds said the purchase or download was for their own use only, whilst Getty Images and Shutterstock Business Solutions customers were more likely to download for someone else's use only (three in ten).

Figure 4: Own use (including commercially) versus someone else's use



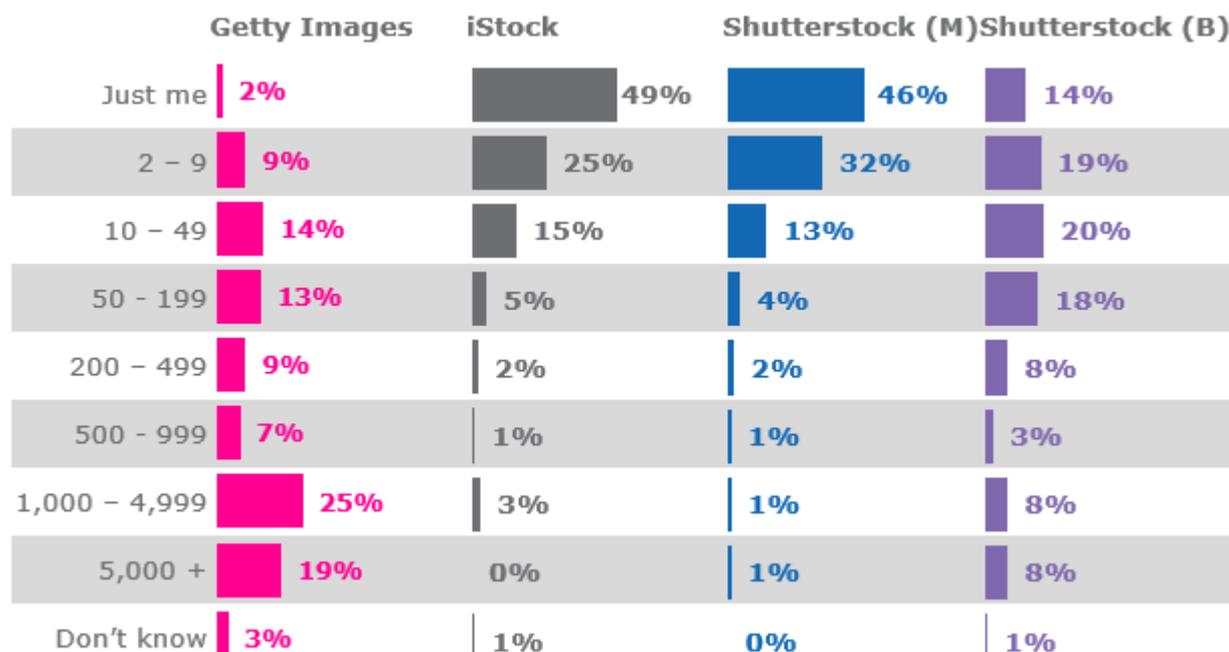
Source: S03. On this occasion, did you make the purchase/download...? **Base:** all respondents. Getty Images (n=126), iStock (n=127), Shutterstock Marketplace (n=117), Shutterstock Business Solutions (n=126).



Number of employees

Customers who downloaded or purchased stock content for commercial purposes were asked about the size of their organisation in terms of the number of employees. iStock and Shutterstock Marketplace customers are mostly small organisations, with around half being sole traders. Getty Images customers are more likely to work for a large organisation (almost half have more than 1,000 employees). Shutterstock Business Solutions customers vary in terms of size, but mostly have between 2 and 199 employees.

Figure 5: Number of employees (commercial users only)



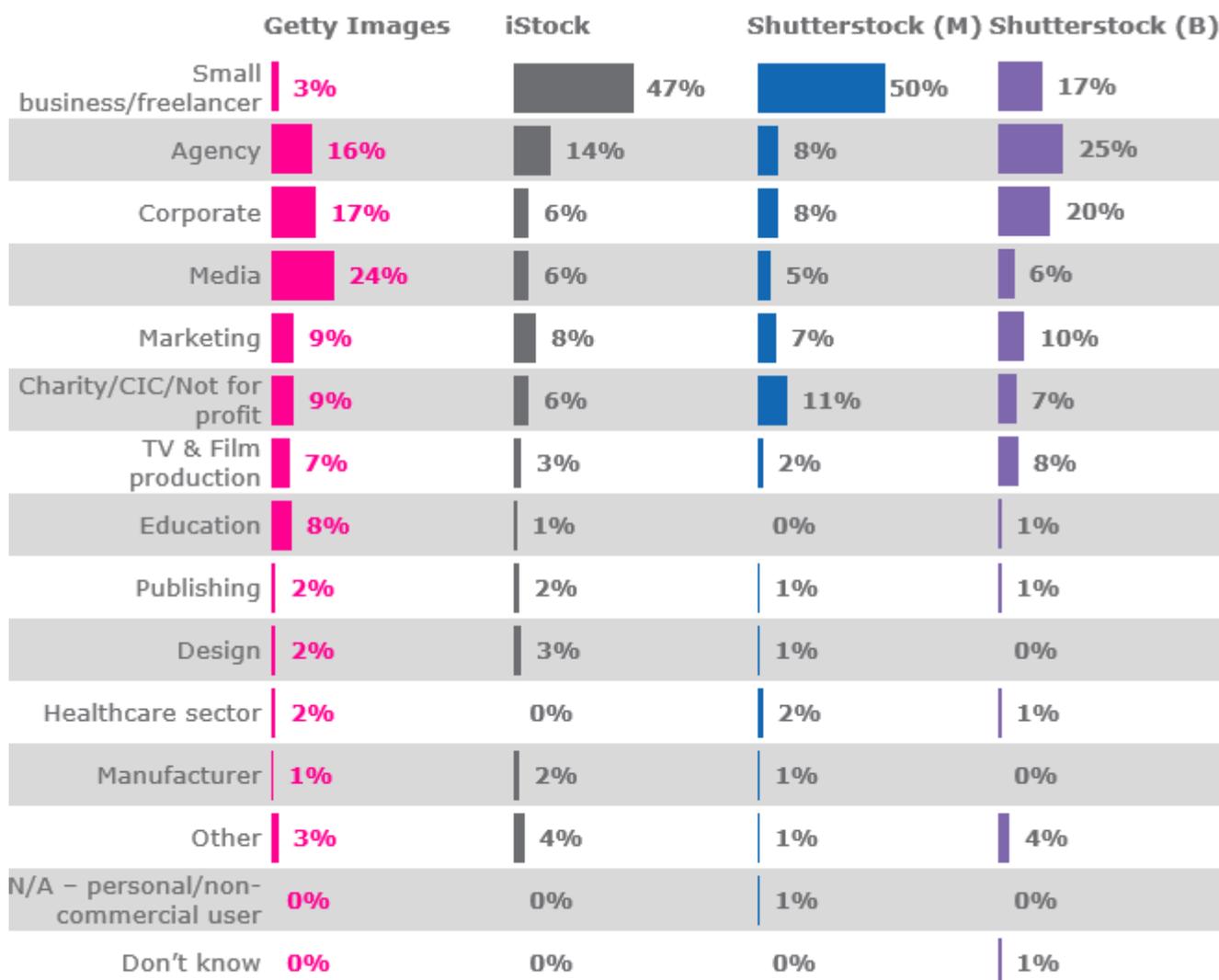
Source. D01. Approximately, how many employees currently work at your business/organisation across all sites in the UK and (if applicable) elsewhere? **Base:** those who have downloaded/purchased for commercial use only or for both commercial and personal/non-commercial use. Getty Images (n=116), iStock (n=107), Shutterstock Marketplace (n=96), Shutterstock Business Solutions (n=119).



Type of organisation

Respondents who use stock content for commercial use (including a mix of commercial/personal use) were also asked about the type of organisation they work for. There is a whole range of businesses within the Parties' customers, and again, this differs according to strata. Half of iStock and Shutterstock Marketplace customers surveyed were in small businesses or were freelancers, whilst Getty Images and Shutterstock Business Solutions customers were more likely to be part of media or agency-type organisations, respectively.

Figure 6: Type of organisation (commercial users only)



Source. D02. In relation to your use of image or video content, which of the following best describes your business/organisation? **Base:** those who have downloaded/purchased for commercial use only or for both commercial and personal/non-commercial use. Getty Images (n=116), iStock (n=107), Shutterstock Marketplace (n=96), Shutterstock Business Solutions (n=119).



2 Summary of key findings

Use of stock content suppliers

Use of multiple suppliers of stock content is common

Many customers use more than one supplier of stock images or videos (around three-quarters overall, and between two-thirds and nine in ten by stratum). There is a material degree of cross-use between the Parties' brands, with between one and two-fifths of customers also using at least one brand owned by the other Party in addition to the sampled brand (for example, a Getty Images customer also using a Shutterstock brand). Adobe and Canva are commonly cited alternative suppliers.

Choice factors and diversion

Range and quality are key drivers of supplier choice for both Parties

Range is the most important choice factor across all customer types, both when customers are able to select multiple factors and when asked to identify the single most important driver. Quality is generally the second most important factor overall, while price is consistently the least important. Service is relatively more important for Getty Images and Shutterstock Business Solutions customers, whilst it is cited as the least important factor for Shutterstock Marketplace customers.

Multi-sourcing is common and driven by content needs

Many customers use more than one supplier, primarily to increase the range and diversity of content available to them. Access to different content categories and, to a lesser extent, cost advantages motivate multi-supplier use, rather than technical or bundling considerations.

Diversion scenarios indicate material levels of cross-Party diversion and low current diversion to AI

In hypothetical diversion scenarios where the sampled brand was not available, most customers would choose another paid supplier as their next best alternative, with between four in ten and a half diverting to the other Party's brands. Adobe is also a commonly cited alternative supplier. Currently, diversion to free suppliers is limited, and respondents indicate that they would switch to AI only to a limited extent.

Use of AI

AI use is growing, but quality and authenticity remain barriers

The use of AI varies in the context of stock content. Around two-thirds of customers report using AI to generate or modify content, and usage is expected to increase over the next two years. However, perceptions of quality remain mixed, with many users viewing AI-generated and AI-modified content as inferior to stock content and others who believe it is 'about the same quality'.

While most anticipate increasing their use of AI, a minority do not plan to use AI at all, citing concerns around authenticity, quality, licensing and company policy.



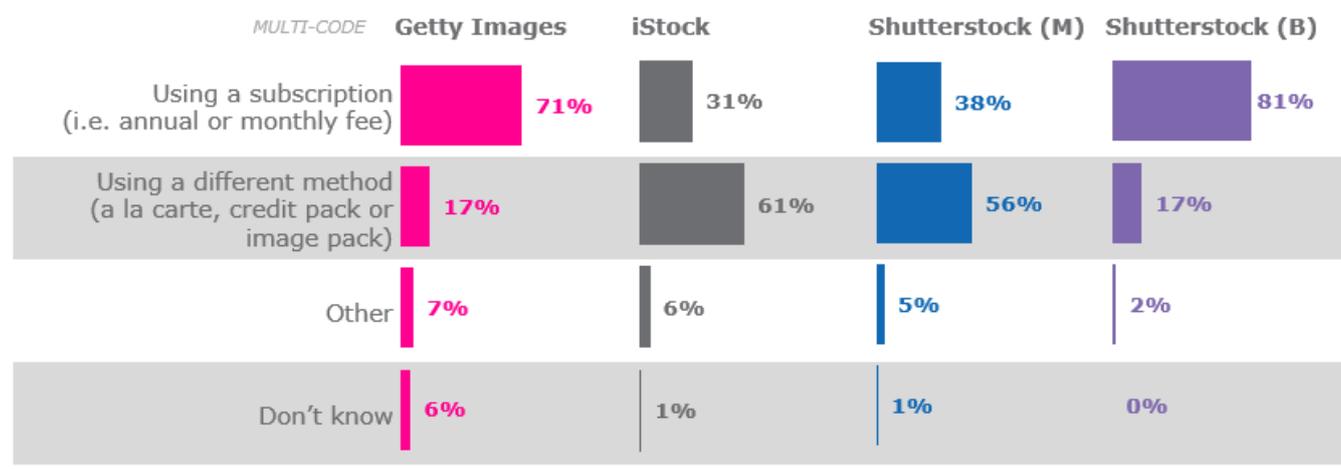
3 Survey results

Use of Stock Content

Type of Payment

Respondents were asked how they paid for stock content. Purchasing via subscription is most common for Getty Images and Shutterstock Business Solutions customers, whilst iStock and Shutterstock Marketplace have more customers who pay via a different method. A small number select 'other' or 'don't know'.

Figure 7: Payment options used for <BRAND>

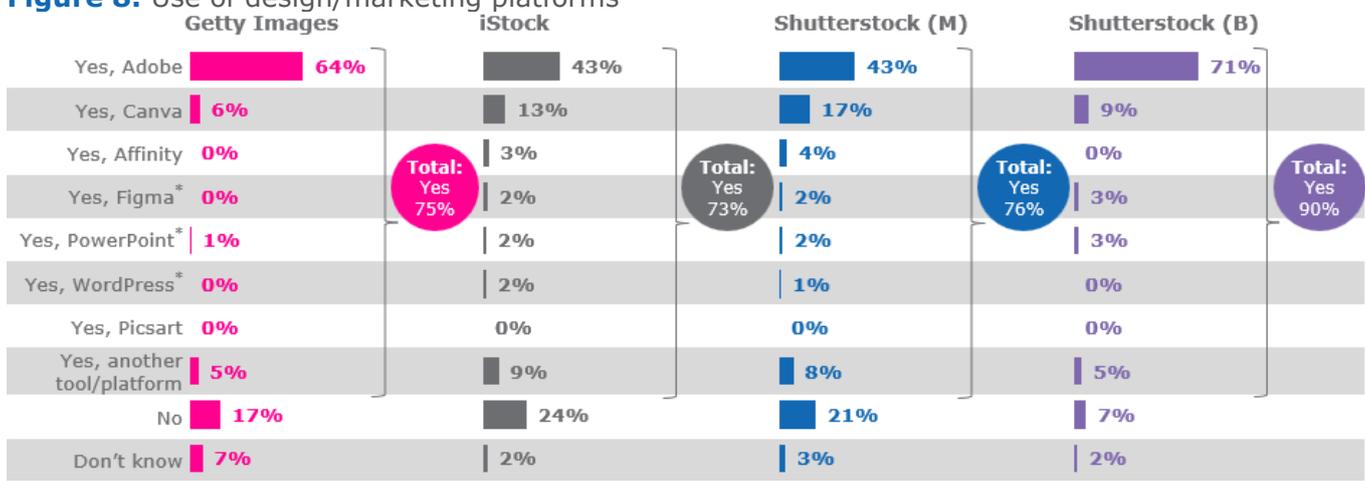


Source. Q01NEW. How do you/does your business/organisation pay for image or video content from <BRAND>? Base: all respondents. Getty Images (n=126), iStock (n=127), Shutterstock Marketplace (n=117), Shutterstock Business Solutions (n=126).

Use of design/editing/marketing platforms

Respondents were asked whether they used any design, editing or marketing tools or platforms to produce work in relation to their most recent purchase or download. Around three-quarters of Getty Images, iStock and Shutterstock Marketplace customers use a tool or platform, whilst this rises to nine in ten among Shutterstock Business Solutions customers. The most common platform used is Adobe, followed by Canva.

Figure 8: Use of design/marketing platforms



Source. Q02. Thinking about the most recent occasion when you purchased/downloaded image or video content from <BRAND> for <IF S05/3: commercial> use in the UK, was that image or video content used with any design, editing or marketing tool or platform to produce your/someone else's end work or project? Base: all respondents. Getty Images (n=126), iStock (n=127), Shutterstock Marketplace (n=117), Shutterstock Business Solutions (n=126). *coded from 'other specify'

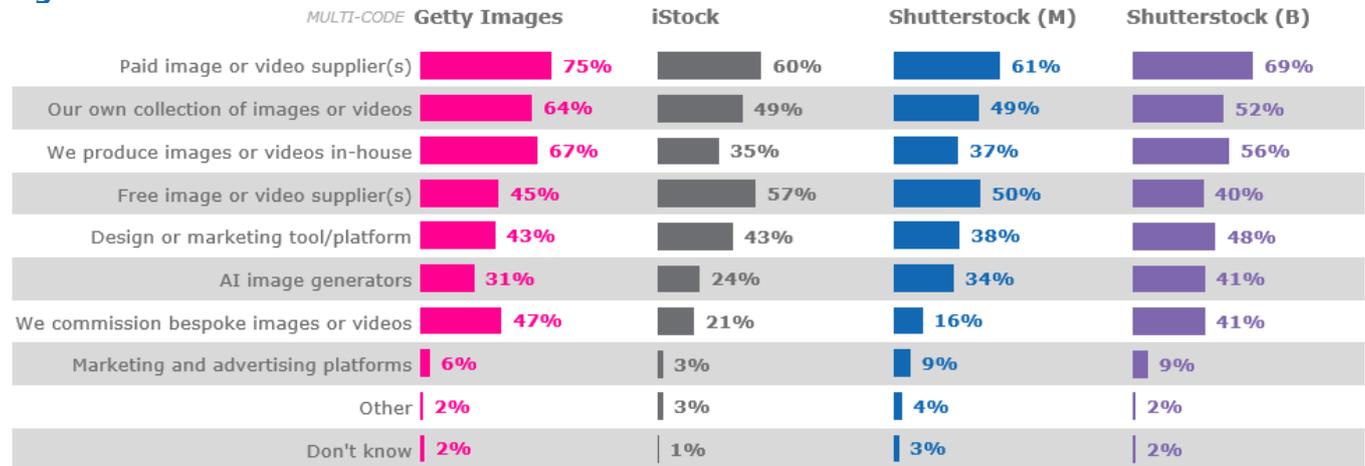
NOTE: 'Total:Yes' figures are the sum of those who selected a 'Yes' code as this is a single code question.



Content sources

Respondents were asked where they have sourced stock content from over the last 12 months. Most commonly, this is from paid-for image or video suppliers, or their own collection of images or videos. Producing images or videos in-house is also common, particularly for Getty Images and Shutterstock Business Solutions customers. Between a quarter and two-fifths of customers use AI image generators.

Figure 9: Where content is sourced from

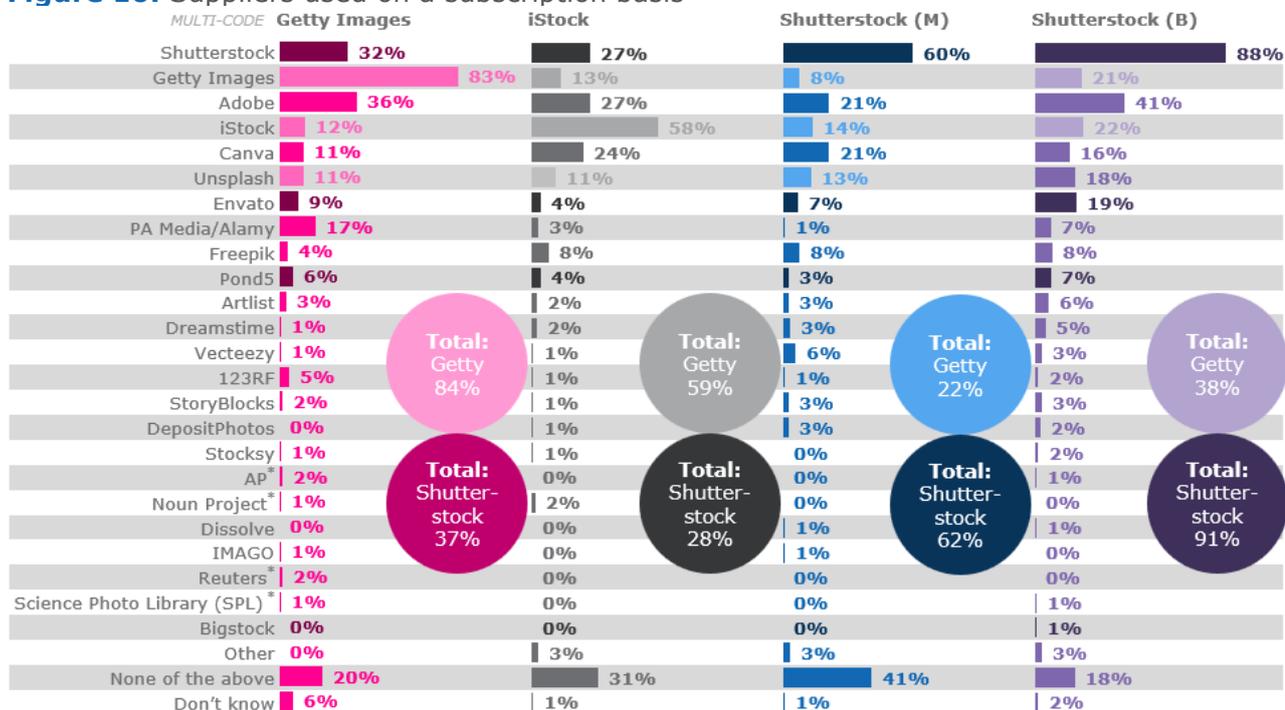


Source. Q03. Where <IF S05/2: have you/IF S05/1,3: has your business/organisation> sourced image or video content from in the last 12 months? **Base:** all respondents. Getty Images (n=126), iStock (n=127), Shutterstock Marketplace (n=117), Shutterstock Business Solutions (n=126). *coded from 'other specify,' as it is unclear whether paid or free images, these have not been back-coded into existing codes.

Use of suppliers: subscription

Respondents were asked which paid suppliers of stock content they had used on a subscription basis over the last 12 months. Overall, Shutterstock is the most used, followed by Getty Images. Other suppliers commonly used were Adobe and Canva. There is a high degree of cross-Party subscription (as shown by the figures in the circles). Almost four in ten Getty Images customers subscribe to a Shutterstock brand, and a similar proportion of Shutterstock Business Solutions customers subscribe to a Getty brand. iStock customers are less likely to hold a Shutterstock subscription (just under three in ten), while even fewer Shutterstock Marketplace customers subscribe to a Getty brand (around one in five).

Figure 10: Suppliers used on a subscription basis





Source. Q04a. In the last 12 months, which of the following suppliers (if any) have you/has your business/organisation> obtained paid images or videos from using a subscription (i.e. annual or monthly fee)? **Base:** all respondents. Getty Images (n=126), iStock (n=127), Shutterstock Marketplace (n=117), Shutterstock Business Solutions (n=126). *coded from 'other specify.'

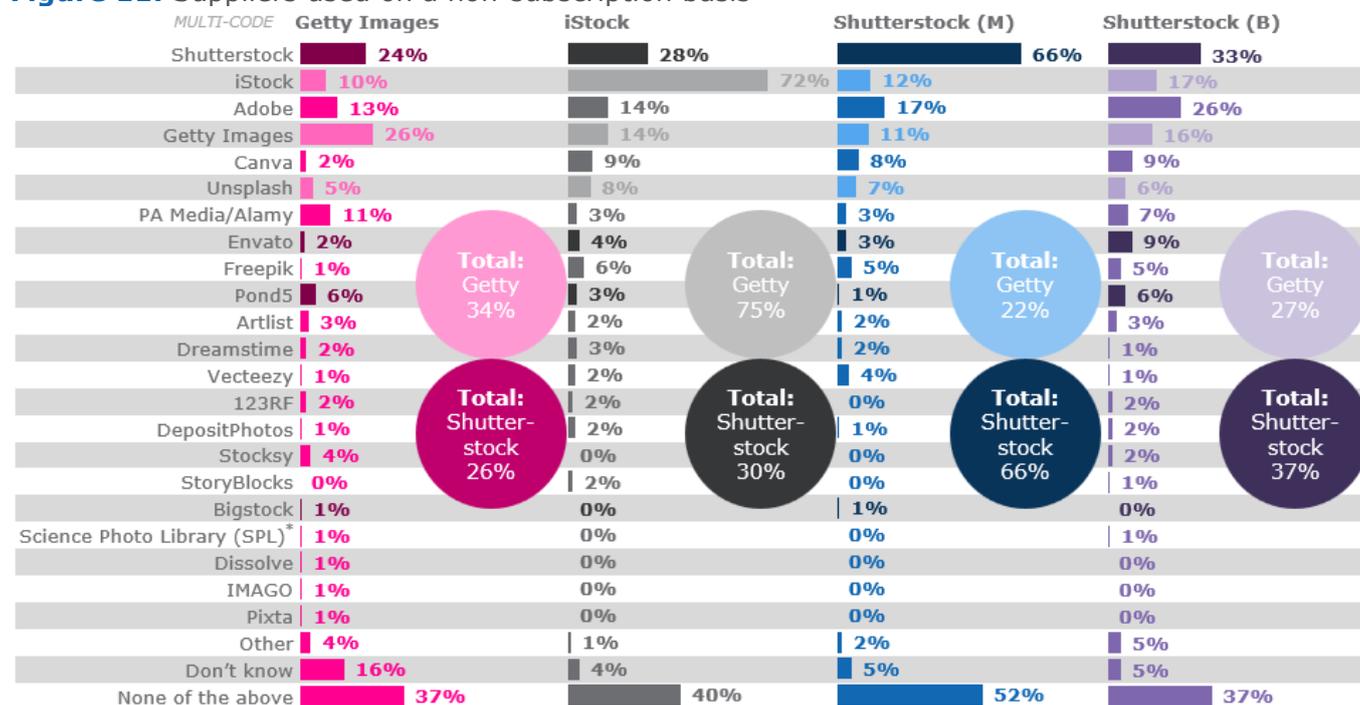
'Total' figures are the percentage of respondents who selected one or more of the relevant Party brands. Getty brands are Getty Images, iStock and Unsplash. Shutterstock brands are Shutterstock, Bigstock, Envato and Pond5. Respondents who chose multiple options are counted only once. As multiple answers were allowed, totals across options may exceed 100%.

NOTE: Sample brands are auto-selected, so if respondents said they had a subscription at Q01, the relevant brand was automatically selected for them. For example, a Getty Images customer did not need to manually select Getty Images, as this was pre-filled based on their earlier response. 'Total' figures are the percentage of respondents who selected one or more of the relevant options. Respondents who chose multiple options are counted only once. As multiple answers were allowed, totals across options may exceed 100%.

Use of suppliers: non-subscription

Respondents were also asked which suppliers of stock content they have used on a non-subscription basis. Adobe still features highly, while Canva is less used compared to subscription-related purchases. As the figures in the circles show, cross-Party non-subscription use remains high, at between one in five and three in ten.

Figure 11: Suppliers used on a non-subscription basis



Source. Q04b. In the last 12 months, which of the following suppliers (if any) have you/has your business/organisation> obtained paid images or videos from using a different method to subscription (e.g. a la carte, credit pack or image pack)? **Base:** all respondents. Getty Images (n=126), iStock (n=127), Shutterstock Marketplace (n=117), Shutterstock Business Solutions (n=126). *coded from 'other specify'.

'Total' figures are the percentage of respondents who selected one or more of the relevant Party brands. Getty brands are Getty Images, iStock and Unsplash. Shutterstock brands are Shutterstock, Bigstock, Envato and Pond5. Respondents who chose multiple options are counted only once. As multiple answers were allowed, totals across options may exceed 100%.

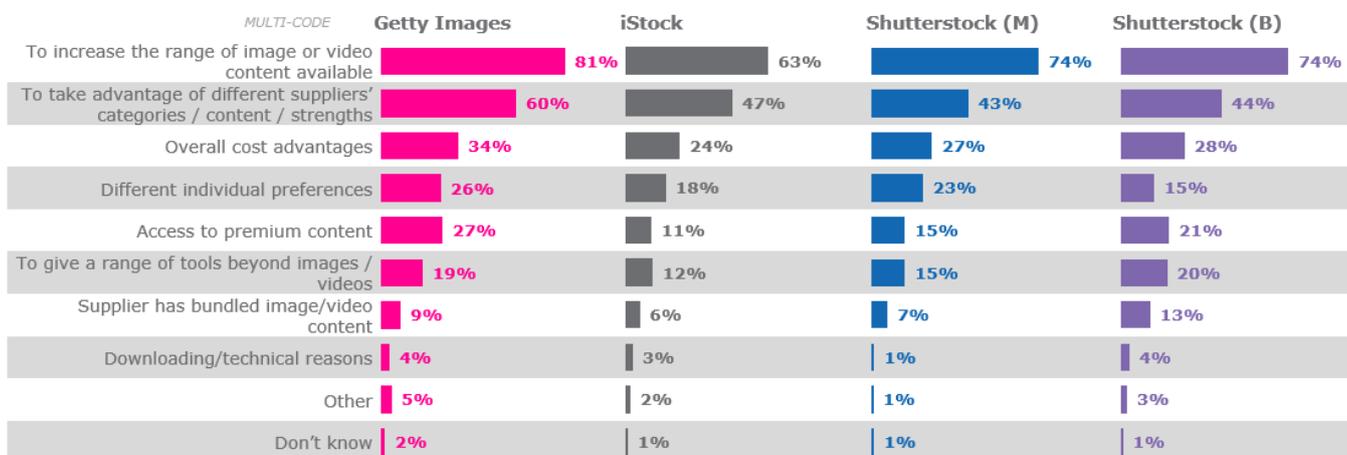
NOTE: Sample brands are auto-selected, so if respondents said paid via non-subscription at Q01, the relevant brand was automatically selected for them. For example, a Getty Images customer did not need to manually select Getty Images, as this was pre-filled based on their earlier response. 'Total' figures are the percentage of respondents who selected one or more of the relevant options. Respondents who chose multiple options are counted only once. As multiple answers were allowed, totals across options may exceed 100%.



Reasons for using multiple suppliers

Just over three-quarters (77%) of respondents multi-source (use more than one supplier of stock content). These respondents were asked why they use another supplier in addition to the sampled brand. The vast majority say this is to increase the range of content available; however, 'taking advantage of the different categories, content types and strengths of different suppliers' is also a common answer.

Figure 12: Reasons for using multiple suppliers



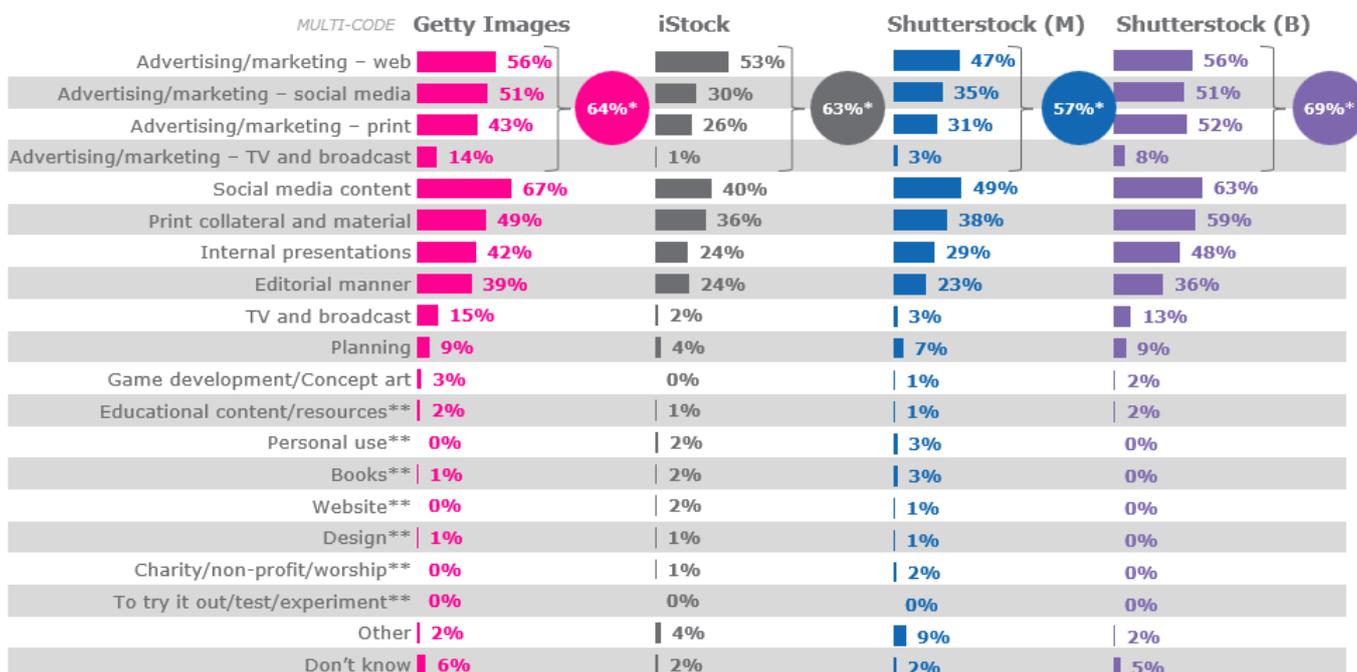
Source. Q05. Please explain why you use/your business/organisation uses multiple suppliers of image or video content?

Base: those who use a supplier other than the sample brand. Getty Images (n=102), iStock (n=99), Shutterstock Marketplace (n=74), Shutterstock Business Solutions (n=109).

Use of paid content

Respondents were asked about their use of paid content. The most common use is advertising (around two-thirds). However, paid content is used for a wide range of purposes, including social media content and print collateral. Getty Images customers, in particular, are more likely to mention TV and broadcast use.

Figure 13: Use paid content for...



Source. Q06. In the last 12 months, for which of the following (if any) have you/has your business/organisation used paid image or video content? **Base:** all respondents. Getty Images (n=126), iStock (n=127), Shutterstock Marketplace (n=117), Shutterstock Business Solutions (n=126). **coded from 'other – specify'

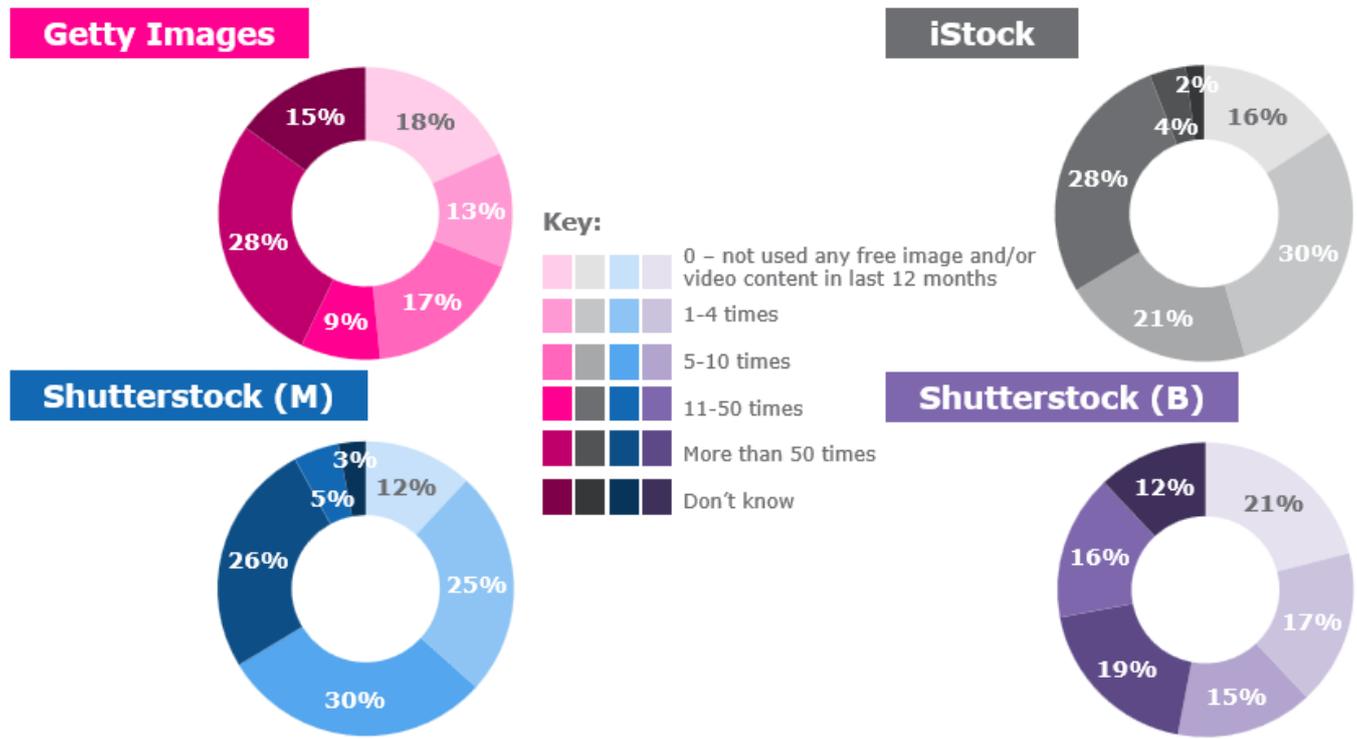
*Percentage is 'Total: Advertising' figure which is the percentage of respondents who selected one or more of the advertising options. Respondents who chose multiple options are counted only once. As multiple answers were allowed, totals across options may exceed 100%. **coded from 'other – specify'



Free download activity over the past year

Respondents were asked if they had made any free downloads of stock content in the last 12 months. Responses on the frequency of free downloads are extremely mixed; however, the majority made at least one free download (over four-fifths).

Figure 14: Free downloads in the last 12 months



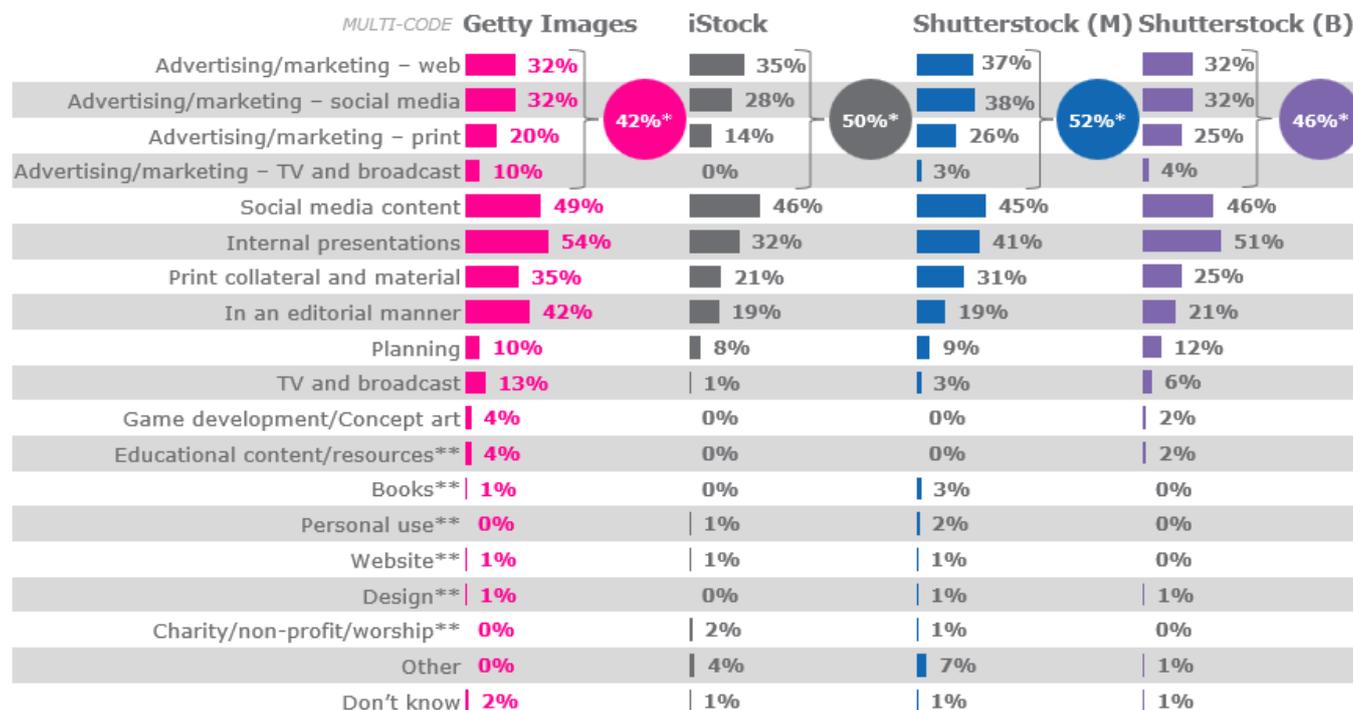
Source: Q07. How many times, if at all, <IF S05/2: have you/IF S05/1,3: has your business/organisation> used free image or video content in the last 12 months? A rough idea is fine if you don't know the exact number. **Base:** all respondents. Getty Images (n=126), iStock (n=127), Shutterstock Marketplace (n=117), Shutterstock Business Solutions (n=126).



Use of free content

Respondents were then asked what the free content downloaded was used for. Advertising remains most common overall, although this is less common when compared to paid-for content. Free content is commonly used for social media content, internal presentations, print collateral and editorial.

Figure 15: Use free content for...



Source. Q08. In the last 12 months, what <IF S05/2: have you/IF S05/1,3: has your business/organisation>used free image or video content for? **Base:** those who use free content. Getty Images (n=84), iStock (n=105), Shutterstock Marketplace (n=100), Shutterstock Business Solutions (n=85).

*Percentage is 'Total: Advertising' figure which is the percentage of respondents who selected one or more of the advertising options. Respondents who chose multiple options are counted only once. As multiple answers were allowed, totals across options may exceed 100%. **coded from 'other – specify'

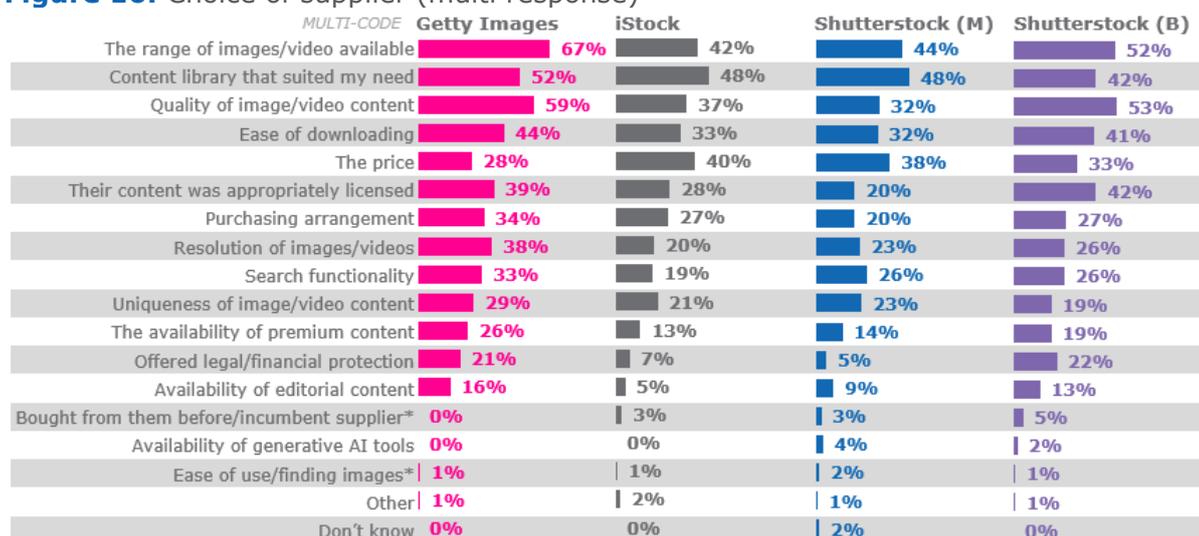
Choice factors & diversion

Choice of supplier: free choice

Respondents who said they had a completely free choice of supplier were asked the reasons why they chose their supplier. The most common answer overall is the range of images/videos available, followed by 'content library that suited my need'. Price is less important for Getty Images and Shutterstock Business Solutions customers.



Figure 16: Choice of supplier (multi response)



Source. Q13. You said you had influence over/involvement in the decision by your business/organisation to use <BRAND> as its only image or video content supplier. Thinking back to when you made the decision to use <BRAND>, why did you choose <BRAND> rather than a different supplier/source? **Base:** those who had free choice to use suppliers. Getty Images (n=98), iStock (n=126), Shutterstock Marketplace (n=111), Shutterstock Business Solutions (n=104). *coded from 'other specify'

Table 2: summary of choice factors (total by category)

The choice factors from the chart above are grouped in order to understand the most important overall*. Range is most important across all customer types, followed closely by quality (except for Shutterstock Business Solutions customers, where service is more important than quality).

Choice Factor (Total)	Price	Quality	Range	Service
Getty Images	47%	72%	83%	68%
iStock	53%	56%	73%	56%
Shutterstock (M)	46%	50%	77%	46%
Shutterstock (B)	47%	65%	73%	68%

Source. Q13. You said you had influence over/involvement in the decision by your business/organisation to use <BRAND> as its only image or video content supplier. Thinking back to when you made the decision to use <BRAND>, why did you choose <BRAND> rather than a different supplier/source? **Base:** those who had free choice to use suppliers. Getty Images (n=98), iStock (n=126), Shutterstock Marketplace (n=111), Shutterstock Business Solutions (n=104).

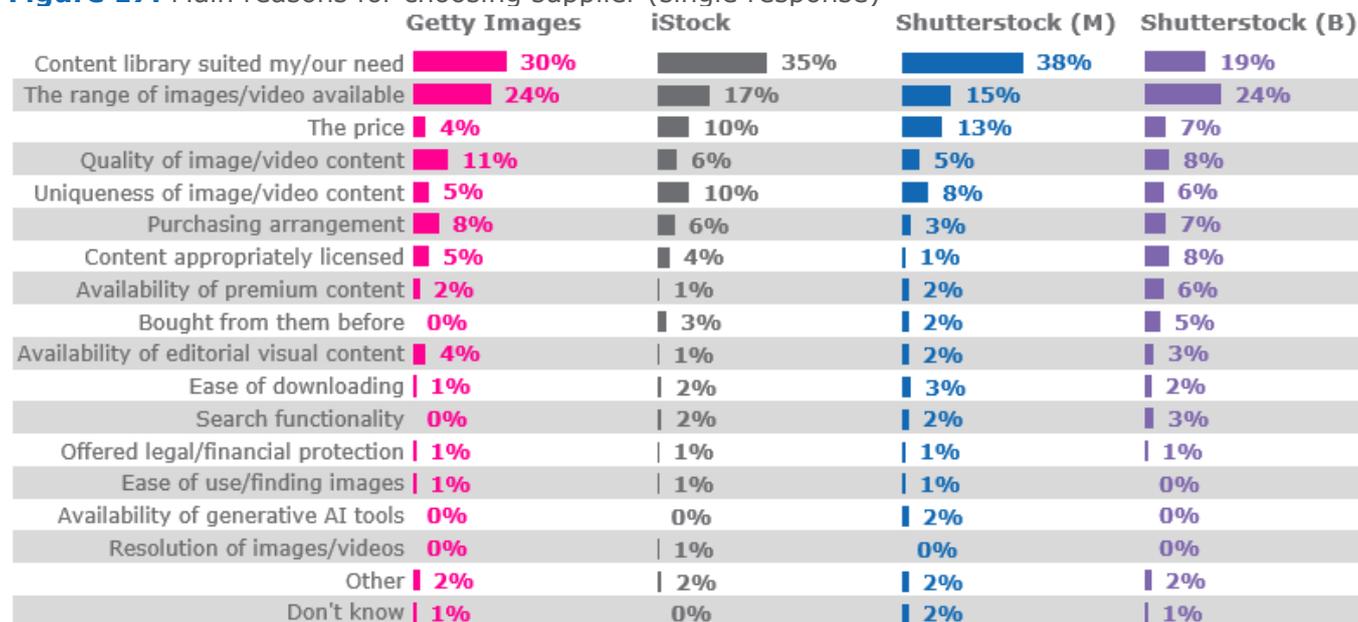
*Groupings are as follows. Price includes: 'The price' and 'Purchasing arrangement'. Quality includes: 'Resolution of images/videos', 'Quality of image/video content', 'Uniqueness of image/video content (images/videos not available elsewhere)' and 'The availability of premium content'. Range includes: 'They had a particular image/video content library that suited my / our need', 'The range of images/video available', 'Availability of generative AI tools or content on the platform' and 'Availability of editorial visual content/content alongside creative visual content'. Service includes: 'Their content was appropriately licensed (owner's permission to use)', '<BRAND> offered legal/financial protection (indemnity)', 'Ease of downloading' and 'Search functionality'.



Main reason for choosing supplier (free choice)

Respondents who had a free choice over the supplier chosen were then asked to state the single most important factor. The most important factor is 'the content library suited my need', except for Shutterstock Business Solutions customers, where the range of images/videos available is the most important.

Figure 17: Main reasons for choosing supplier (single response)



Source. Q14. And which was the MAIN REASON for choosing <BRAND> on this occasion? **Base:** those who had free choice to use suppliers. Getty Images (n=98), iStock (n=126), Shutterstock Marketplace (n=111), Shutterstock Business Solutions (n=104). **NOTE:** If only one answer given at Q13, this has been autofilled in the data, so the chart shows a complete view.

Table 3: summary of choice factors (total by category) – most important reason

The choice factors from the chart above are grouped in order to understand the most important overall*. Range is most important across all customer types, with other categories far behind.

Choice Factor (Total)	Price	Quality	Range	Service
Getty Images	12%	18%	58%	7%
iStock	16%	18%	52%	8%
Shutterstock (M)	15%	15%	57%	6%
Shutterstock (B)	13%	19%	46%	13%

Source. Q14. And which was the MAIN REASON for choosing <BRAND> on this occasion? **Base:** those who had free choice to use suppliers. Getty Images (n=98), iStock (n=126), Shutterstock Marketplace (n=111), Shutterstock Business Solutions (n=104). **NOTE:** If only one answer given at Q13, this has been autofilled in the data, so the chart shows a complete view.

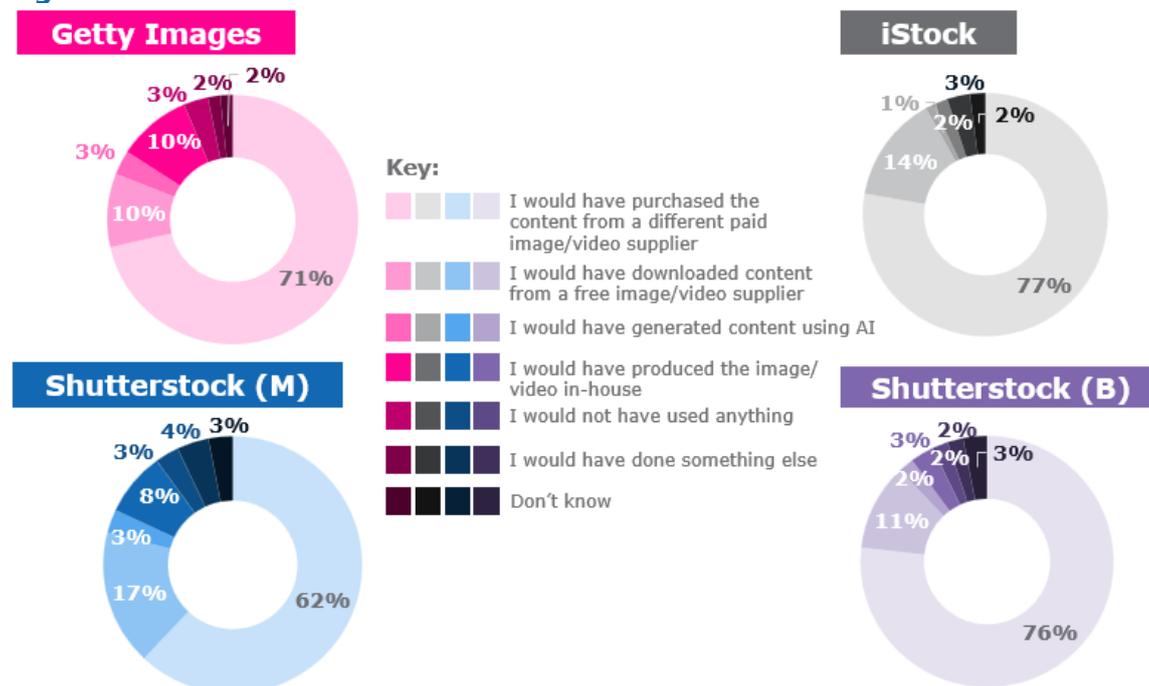
*Groupings are as follows. Price includes: 'The price' and 'Purchasing arrangement'. Quality includes: 'Resolution of images/videos', 'Quality of image/video content', 'Uniqueness of image/video content (images/videos not available elsewhere)' and 'The availability of premium content'. Range includes: 'They had a particular image/video content library that suited my / our need', 'The range of images/video available', 'Availability of generative AI tools or content on the platform' and 'Availability of editorial visual content/content alongside creative visual content'. Service includes: 'Their content was appropriately licensed (owner's permission to use)', '<BRAND> offered legal/financial protection (indemnity)', 'Ease of downloading' and 'Search functionality'.



Diversion

Respondents were asked what they would have done if the brand they had used had not been available when they made their most recent download or purchase. The vast majority say they would have purchased the content from a different supplier (around three-quarters, except for Shutterstock Marketplace customers, where this is around six in ten). Downloading free content is the next most common answer. A very small proportion say they would have generated the content using AI.

Figure 18: Diversion: If <BRAND> not available...



Source. Q15. Thinking back to when you made your decision to purchase/download image or video content from <BRAND> on this occasion ...If that supplier had not been available, and taking account of all the options that might be available to you, what are you most likely to have done instead? **Base:** all respondents. Getty Images (n=126), iStock (n=127), Shutterstock Marketplace (n=117), Shutterstock Business Solutions (n=126).

Diversion: downloading content from a free supplier

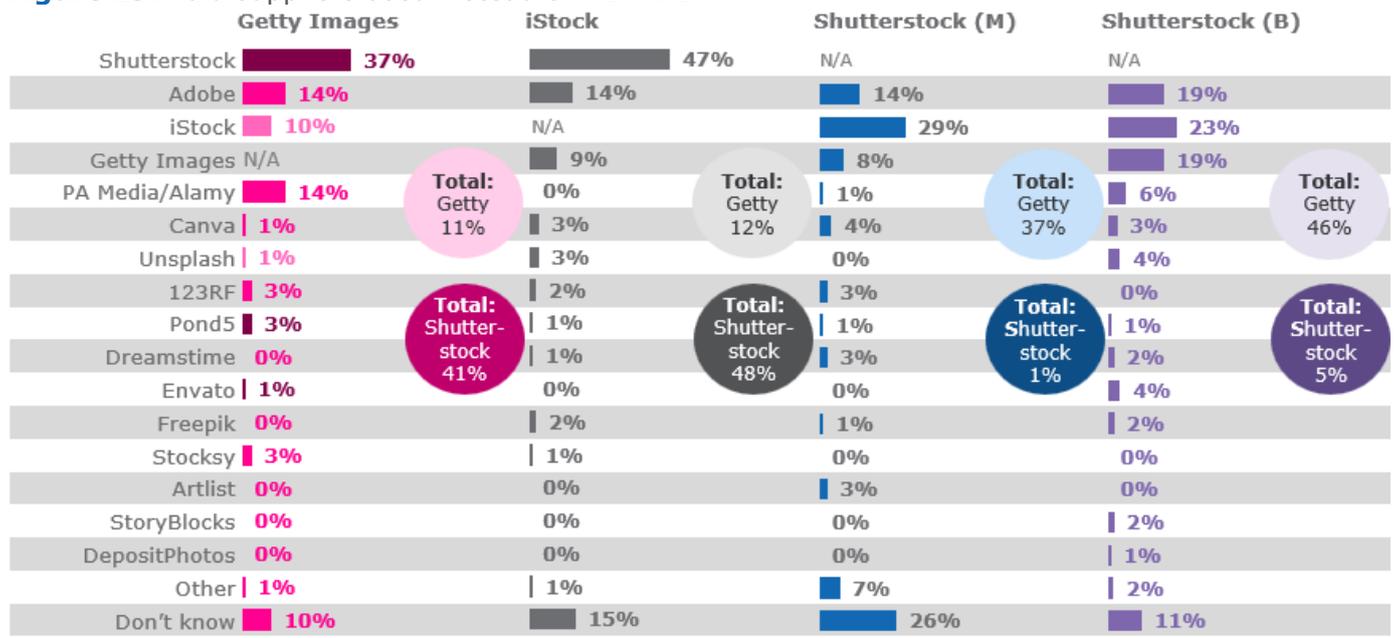
Respondents who said they would have downloaded free content (if their sample brand was not available) were asked which supplier they would use for this free download. The most common answer is Canva, followed by Pexels. The base size for this question is very small (n=64), so charts are not shown, as base sizes become very small once split by strata (between 12 and 20).

Diversion to paid supplier

Respondents who said they would use an alternative paid supplier were asked who they would have bought from instead. Aside from the Parties' brands, Adobe is the most common alternative. Cross-Party diversion is high, with between four in ten and a half saying they would purchase from the other Party. The proportion who say they 'don't know' which supplier they would use instead is notable; around one in ten for Getty Images and Shutterstock Business Solutions customers, one in seven for iStock customers and a quarter for Shutterstock Marketplace customers.



Figure 19: Paid suppliers used instead of <BRAND>



Source. Q17. Which supplier would you have bought image or video content from instead? **Base:** those who would have purchased from a different brand under diversion. Getty Images (n=90), iStock (n=98), Shutterstock Marketplace (n=73), Shutterstock Business Solutions (n=96). *N/A shows as respondents could not select their sample brand. 'Total' figures are the percentage of respondents who selected one or more of the relevant Party brands. Getty brands are Getty Images, iStock and Unsplash. Shutterstock brands are Shutterstock, Bigstock, Envato and Pond5. Respondents who chose multiple options are counted only once. As multiple answers were allowed, totals across options may exceed 100%.

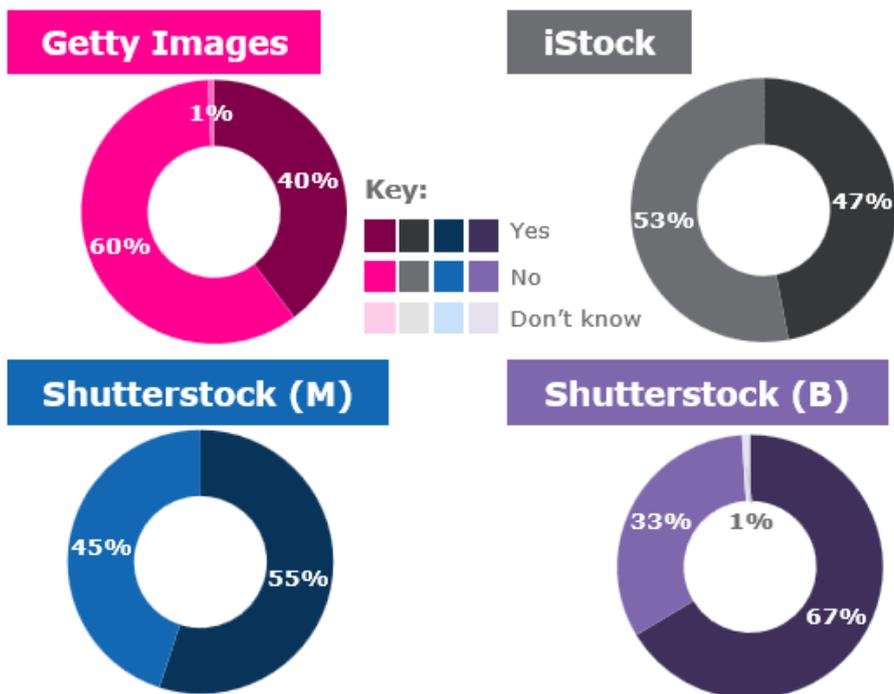


Use of AI

Use of AI for creating/generating content (AI-creation/generation)

Respondents were asked whether they had used AI to create or generate images or videos in the last 12 months. Between four in ten and two-thirds report using AI to create or generate content, with Getty Images customers least likely, and Shutterstock Business Solutions customers most likely, to do so.

Figure 20: Use of AI for the generation/creation of content



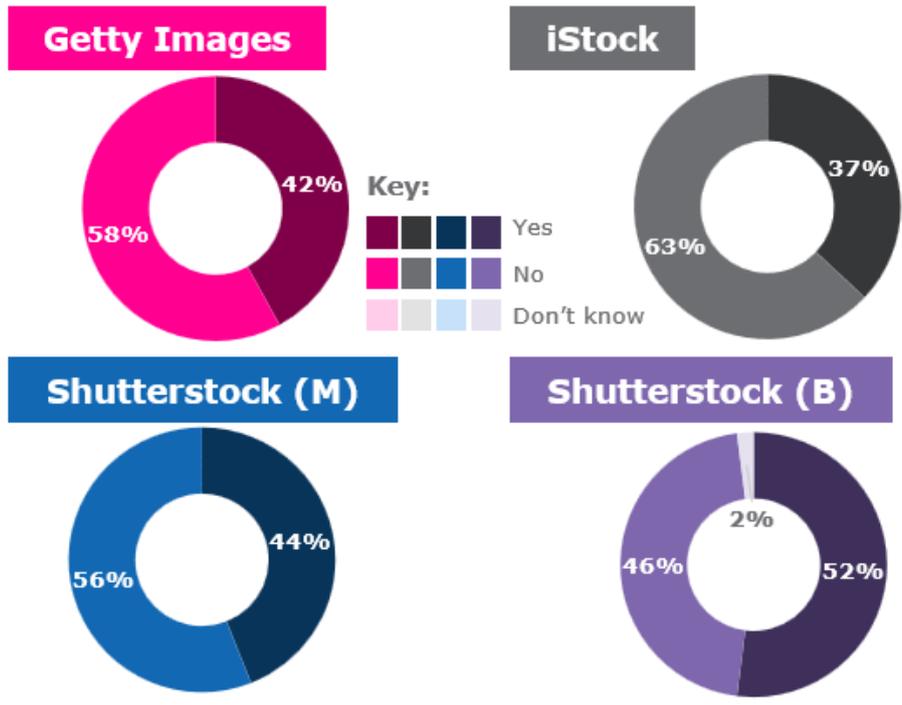
Source. Q11. In the last 12 months, have you personally used AI to create/generate images or videos (as opposed to modifying them)? **Base:** all respondents. Getty Images (n=126), iStock (n=127), Shutterstock Marketplace (n=117), Shutterstock Business Solutions (n=126).



Use of AI for modifying content (AI-modification)

Respondents were also asked whether they had used AI to modify content over the last 12 months. Around four in ten have done so; this is higher for Shutterstock Business Solutions customers at around a half.

Figure 21: Use of AI for modification of images



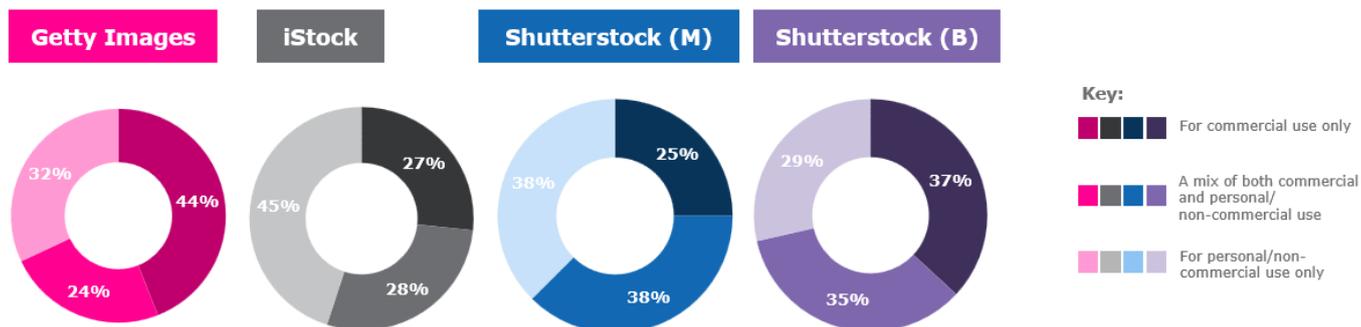
Source. Q12. In the last 12 months, have you personally used AI to modify existing images or videos?
Base: all respondents. Getty Images (n=126), iStock (n=127), Shutterstock Marketplace (n=117), Shutterstock Business Solutions (n=126).



Purpose of AI-created/generated content

Respondents were asked about the purpose of the content they created or generated using AI. This is mixed; however, the majority use AI-generated content for commercial purposes (at least in part). Between three in ten and a half use AI-generated content for personal/non-commercial use only.

Figure 22: Use AI-created/generated content for...

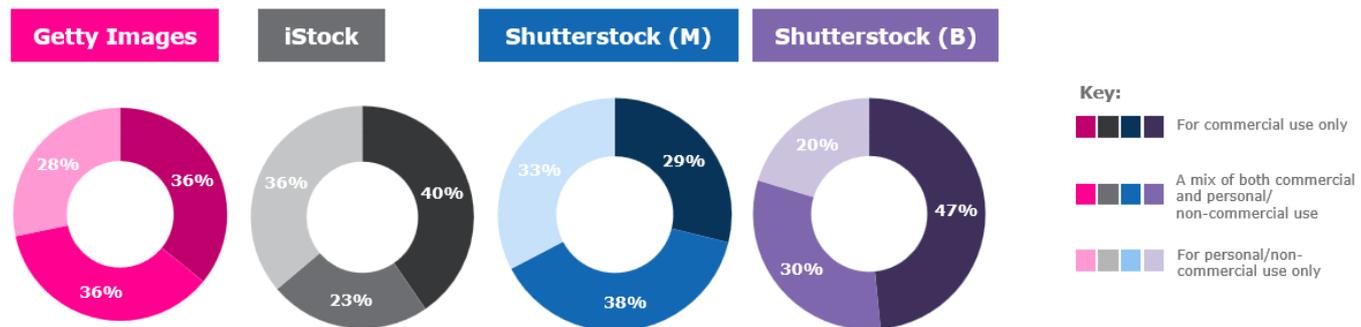


Source. Q21. Earlier, you said that you had used AI to create/generate images or videos in the last 12 months. For what purposes have you used the images or videos that you created with this/these AI tool(s)? **Base:** those who have created/generated AI content in the last 12 months. Getty Images (n=50), iStock (n=60), Shutterstock Marketplace (n=64), Shutterstock Business Solutions (n=84).

Purpose of AI-modified content

Respondents were asked about the purpose of the content they modified using AI. Usage is mixed, with commercial use (either solely or mixed with personal use) being most common. Between one in five and a third use AI-modified content for personal/non-commercial use only.

Figure 23: Use AI-modified content for...



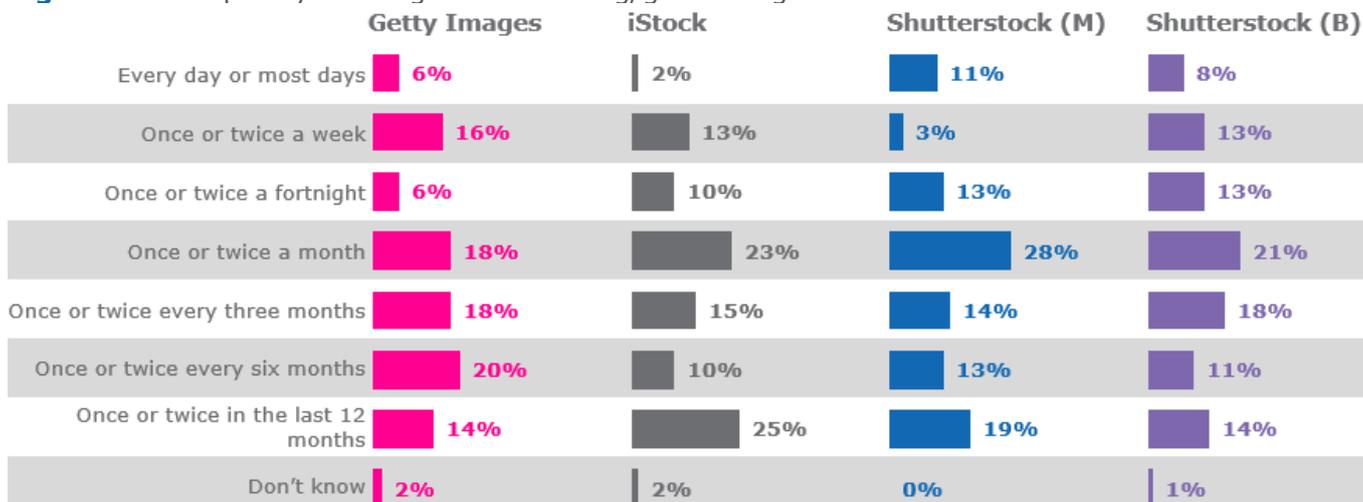
Source. Q29. Earlier, you said that you had used AI to **modify** images or videos in the last 12 months. For what purposes have you used the images or videos that you **modified** with this/these AI tool(s)? **Base:** those who have modified images or videos using AI in the last 12 months. Getty Images (n=53), iStock (n=47), Shutterstock Marketplace (n=52), Shutterstock Business Solutions (n=66).



Frequency of using AI-created/generated content

Respondents who used AI to create or generate content in the last 12 months were asked the frequency with which they did this. The frequency varies by strata. Shutterstock customers (both Marketplace and Business Solutions) are most likely to say once or twice a month, Getty Images customers once or twice every six months and iStock customers once or twice in the last 12 months.

Figure 24: Frequency of using AI for creating/generating content

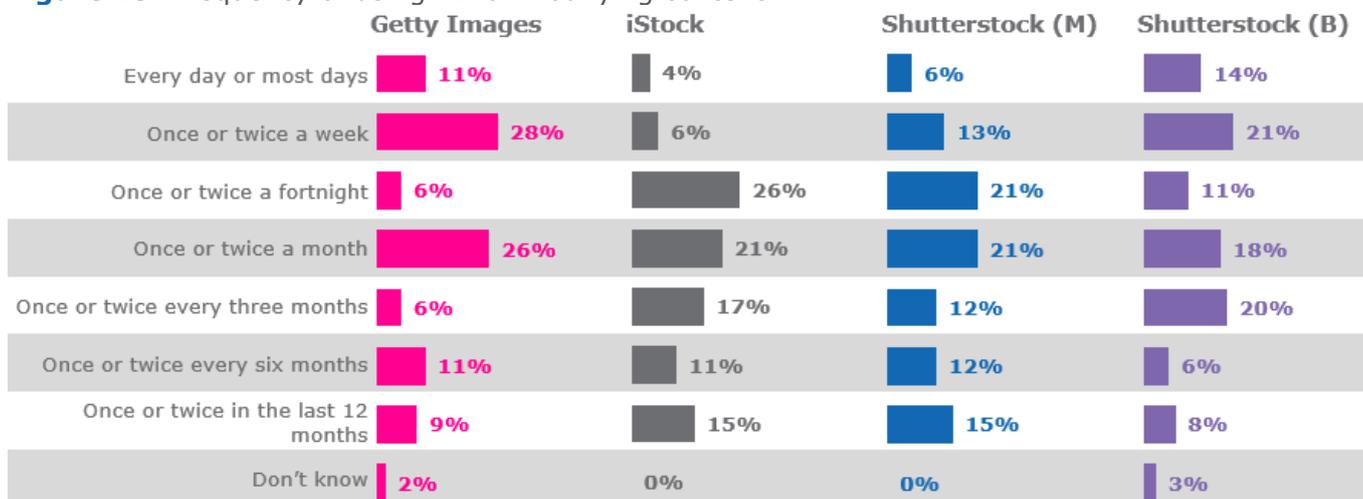


Source. Q22. How often have you used AI to create/generate images or videos in the last 12 months? A rough idea is fine if you don't know exactly how often. **Base:** those who have created/generated AI content in the last 12 months. Getty Images (n=50), iStock (n=60), Shutterstock Marketplace (n=64), Shutterstock Business Solutions (n=84).

Frequency of using AI-modified content

Respondents who used AI to modify content in the last 12 months were asked the frequency with which they did this. The frequency varies a lot by strata. Getty Images customers are most likely to say once or twice a week, iStock customers once or twice a fortnight, and Shutterstock customers (both Marketplace and Business Solutions) report a more varied frequency (a mixture of weekly, fortnightly, monthly and every three months).

Figure 25: Frequency of using AI for modifying content



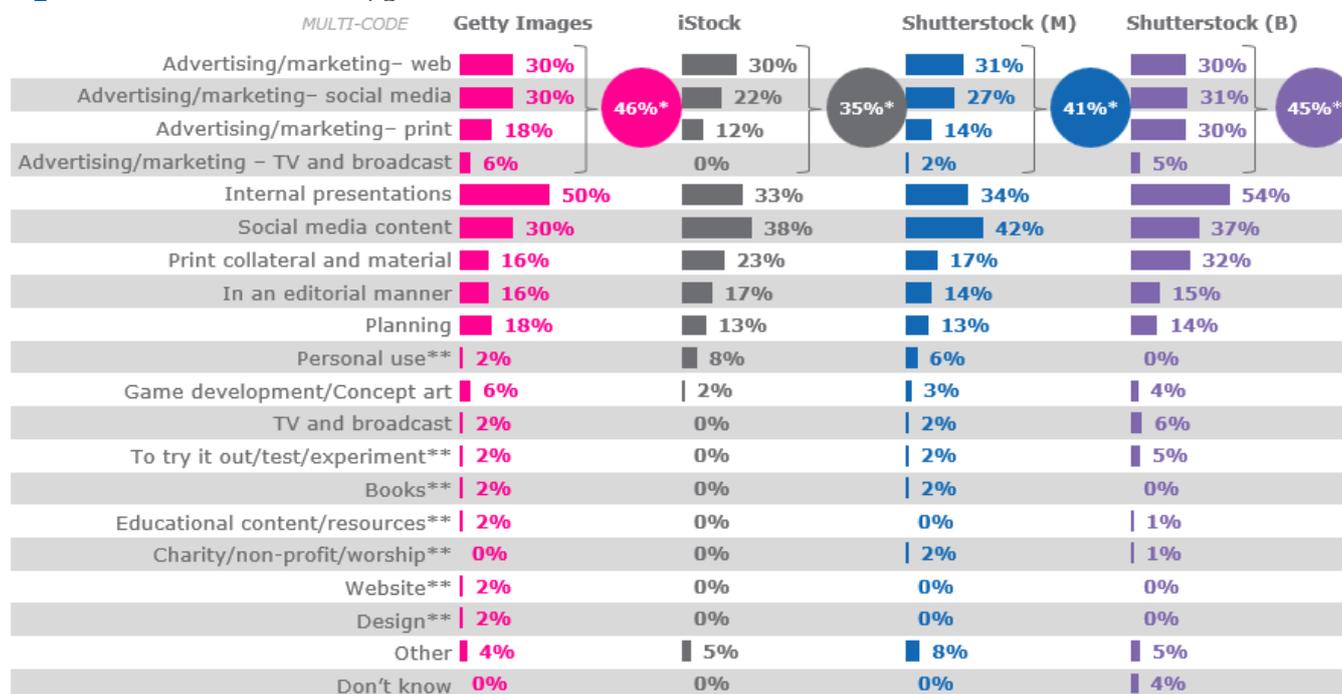
Source. Q30. How often have you used AI to modify images or videos in the last 12 months? A rough idea is fine if you don't know exactly how often. **Base:** those who have modified images or videos using AI in the last 12 months. Getty Images (n=53), iStock (n=47), Shutterstock Marketplace (n=52), Shutterstock Business Solutions (n=66).



What is AI-created/generated content used for

Respondents who used AI to create or generate content in the last 12 months were asked what this content was used for. The most common use cases are internal presentations (Getty Images and Shutterstock Business Solutions customers) and social media (iStock and Shutterstock Marketplace customers), although advertising is still a common use case.

Figure 26: Use AI-created/generated content for...



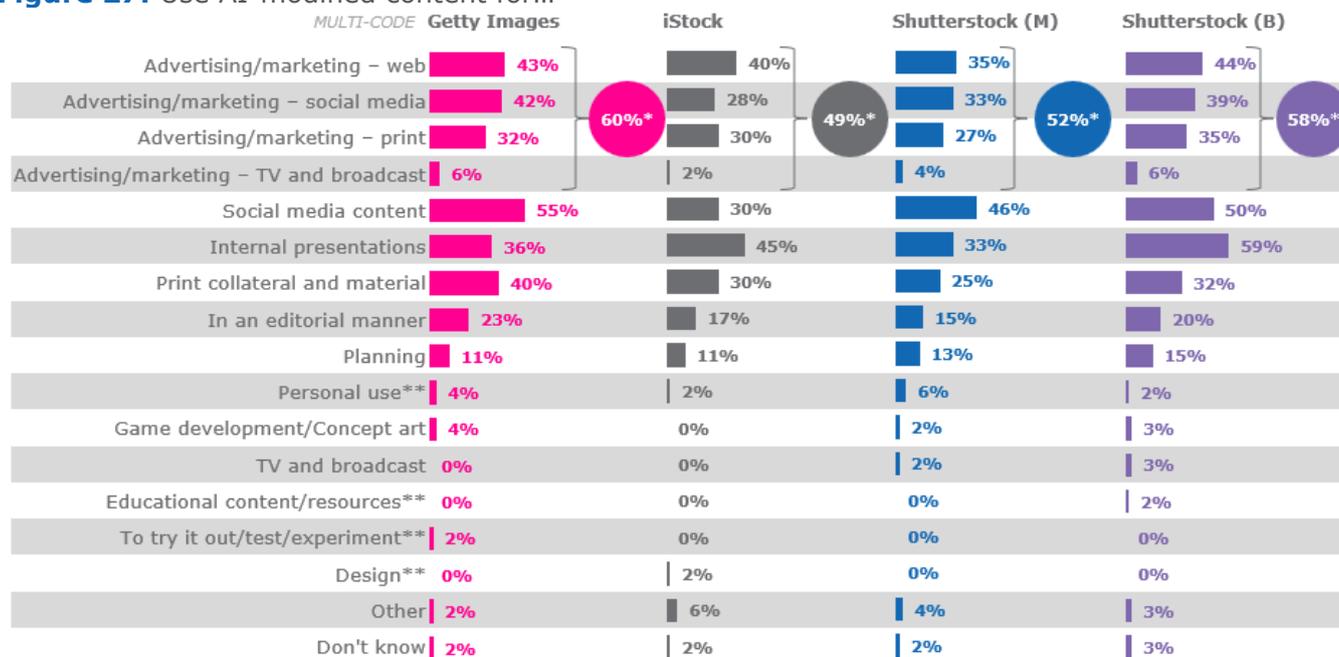
Source. Q23. In the last 12 months, what have you used AI-created/generated content for?
Base: those who have created/generated AI content in the last 12 months. Getty Images (n=50), iStock (n=60), Shutterstock Marketplace (n=64), Shutterstock Business Solutions (n=84). **coded from 'other - specify'
 *Percentage is 'Total: Advertising' figure which is the percentage of respondents who selected one or more of the advertising options. Respondents who chose multiple options are counted only once. As multiple answers were allowed, totals across options may exceed 100%. **coded from 'other - specify'

What is AI-modified content used for

Respondents who used AI to modify content in the last 12 months were asked what this content was used for. The most common use cases are advertising, except for Shutterstock Business Solutions customers, where use for internal presentations is more common.



Figure 27: Use AI-modified content for...



Source. Q31a. In the last 12 months, what have you used modified content for?

Base: those who have modified images or videos using AI in the last 12 months. Getty Images (n=53), iStock (n=47), Shutterstock Marketplace (n=52), Shutterstock Business Solutions (n=66).

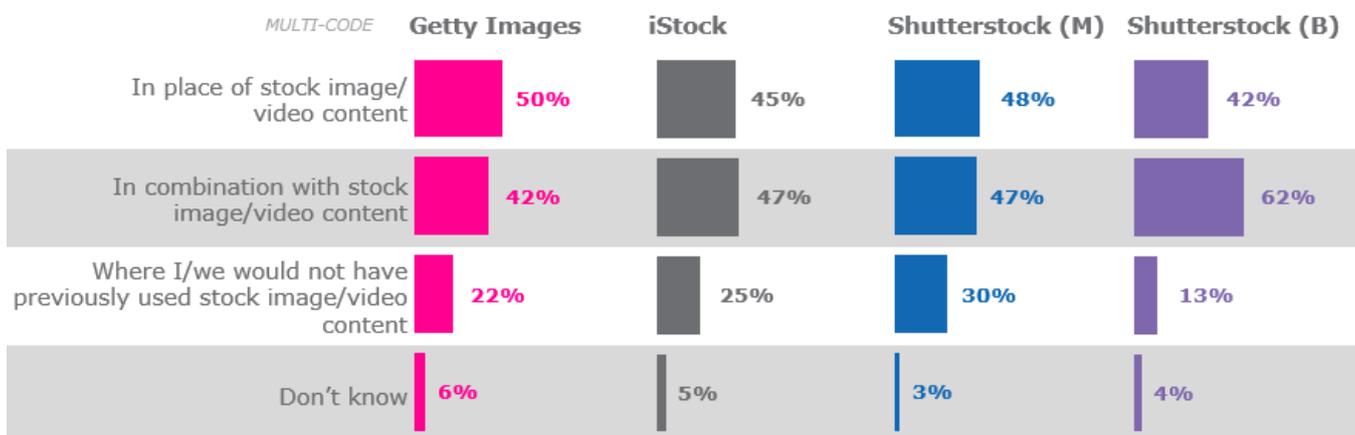
*Percentage is 'Total: Advertising' figure which is the percentage of respondents who selected one or more of the advertising options. Respondents who chose multiple options are counted only once. As multiple answers were allowed, totals across options may exceed 100%. **coded from 'other – specify'



How AI-created/generated content is used

Respondents who used AI to create or generate content in the last 12 months were asked whether this content was used instead of, or in combination with, stock content. Answers vary, with around half saying they use it instead of stock content. Shutterstock Business Solutions customers are more likely to say they use it in combination with stock content (around six in ten). Between one and three in ten say they use AI-created content where they would not have previously used stock content.

Figure 28: How use AI-created/generated content

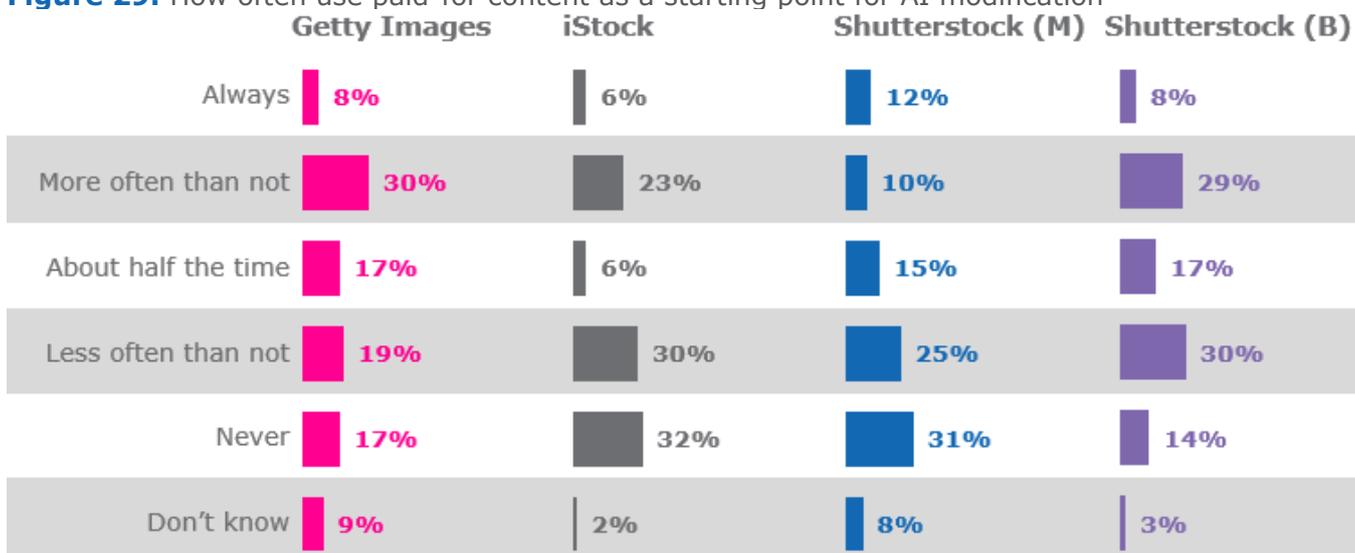


Source. Q24. Still thinking about how you have used AI-created/generated content for commercial purposes/in your personal/non-commercial projects in the last 12 months. Which of the following best describes how you have used it? **Base:** those who have created/generated AI content in the last 12 months. Getty Images (n=50), iStock (n=60), Shutterstock Marketplace (n=64), Shutterstock Business Solutions (n=84).

Using paid-for content as a starting point when modifying content using AI

Respondents who used AI to modify content in the last 12 months were asked how often they started with paid-for content. Responses vary notably both across and within strata.

Figure 29: How often use paid-for content as a starting point for AI modification



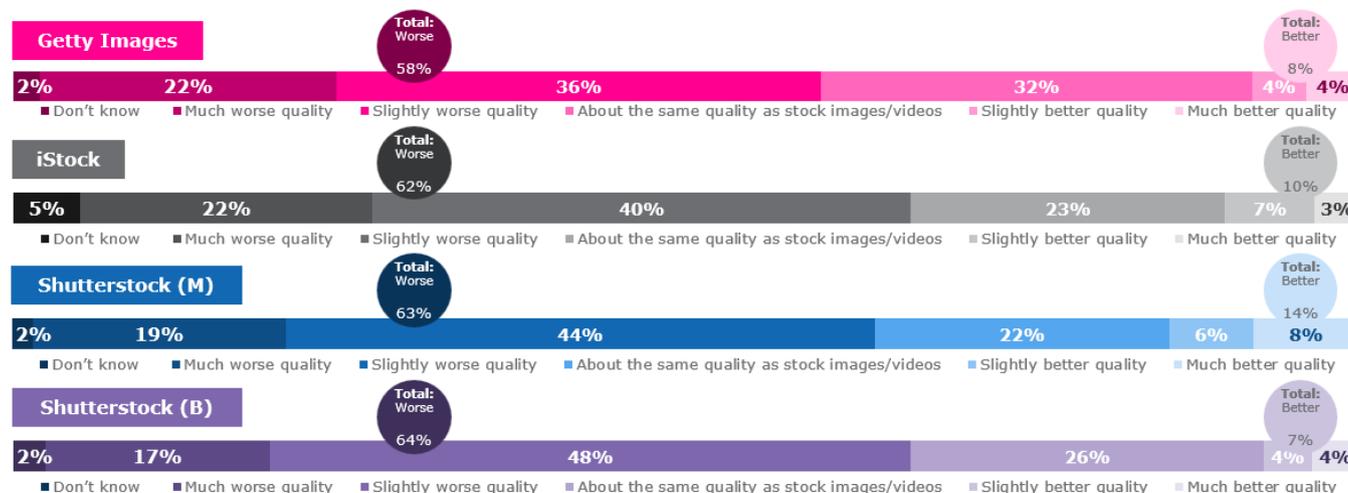
Source. Q32. Still thinking about how you have used AI-modified content, how often (if at all) have you used paid-for stock image or video content, rather than any other image or video content (for example, in-house photography/video or free image/video content), as a starting image or video? **Base:** those who have modified images or videos using AI in the last 12 months. Getty Images (n=53), iStock (n=47), Shutterstock Marketplace (n=52), Shutterstock Business Solutions (n=66).



Quality of AI-created/generated content

Respondents who used AI to create or generate content in the last 12 months were asked their views on the quality of AI-generated content. Very few say AI-generated content is of better quality (at most one in seven), and a high proportion (between one in five and a third) say it is 'about the same quality'.

Figure 30: Quality of AI-created/generated content



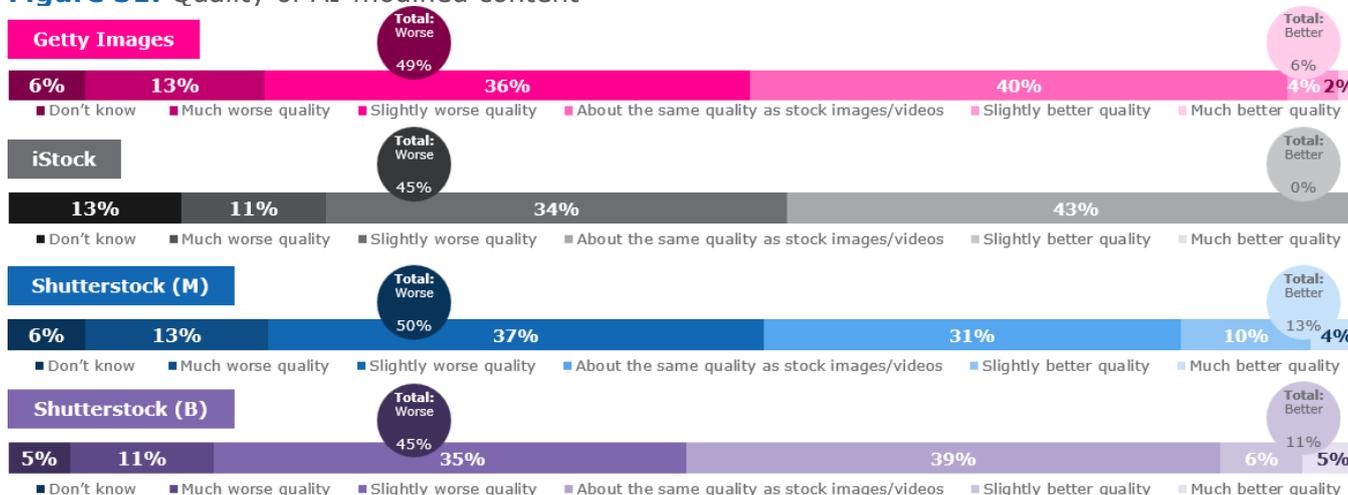
Source. Q25. How would you rate the **quality** of the images or videos you created/generated with AI compared with stock images or videos? In general, the AI-created/generated images or videos were... **Base:** those who have created/generated AI content in the last 12 months. Getty Images (n=50), iStock (n=60), Shutterstock Marketplace (n=64), Shutterstock Business Solutions (n=84).

NOTE: 'Total:Better' is the sum of those who selected much better and slightly better quality, whilst Total: Worse is the sum of those who selected much worse and slightly worse. Figures may appear not to add to 100% due to rounding.

Quality of AI-modified content

Respondents who used AI to modify content in the last 12 months were asked their views on the quality of AI-modified content. Around half say it is worse than stock content, and at most one in eight say it is better. Between three and four in ten say it is 'about the same quality'.

Figure 31: Quality of AI-modified content



Source. Q33. How would you rate the **quality** of the AI-modified images or videos you made compared with unmodified stock images or videos? In general, the AI-modified images or videos were ... **Base:** those who have modified images or videos using AI in the last 12 months. Getty Images (n=53), iStock (n=47), Shutterstock Marketplace (n=52), Shutterstock Business Solutions (n=66).

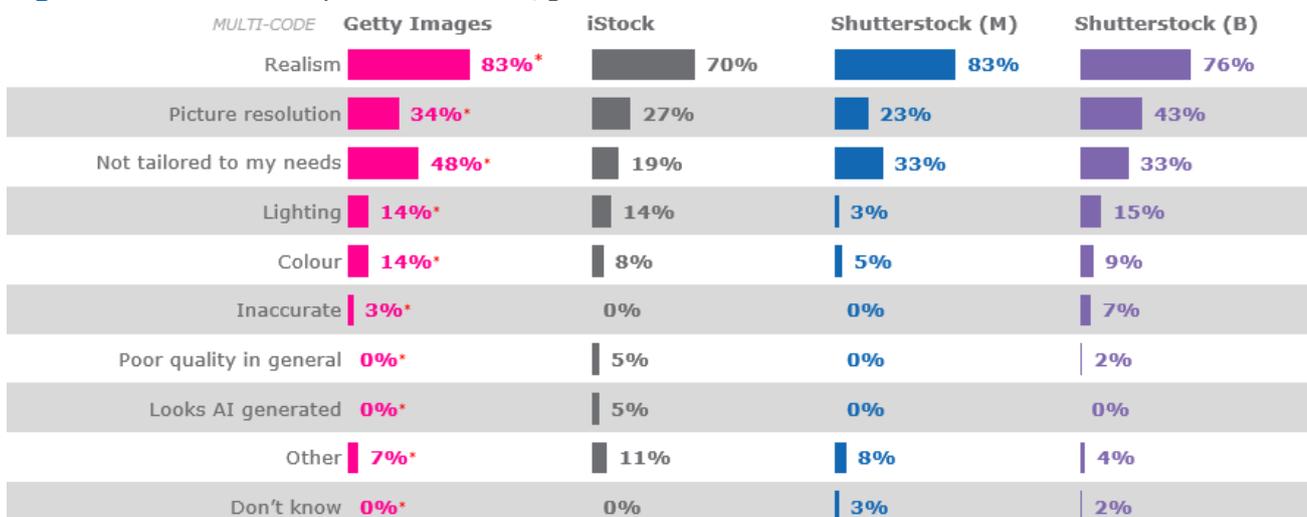
NOTE: 'Total:Better' is the sum of those who selected much better and slightly better quality, whilst Total: Worse is the sum of those who selected much worse and slightly worse. Figures may appear not to add to 100% due to rounding.



Views on why AI-created/generated content is of worse quality

Respondents who thought AI-generated content was worse than unmodified stock content were asked in what ways it was worse. According to customers, realism is by far the biggest issue with AI-generated content, followed by picture resolution and not being tailored to their needs. There are some differences in views across the customer types, with Getty Images customers being more likely to say, 'not tailored to my needs,' and Shutterstock Business Solutions customers being more likely to say, 'picture resolution.'

Figure 32: In what ways is AI-created/generated content worse?



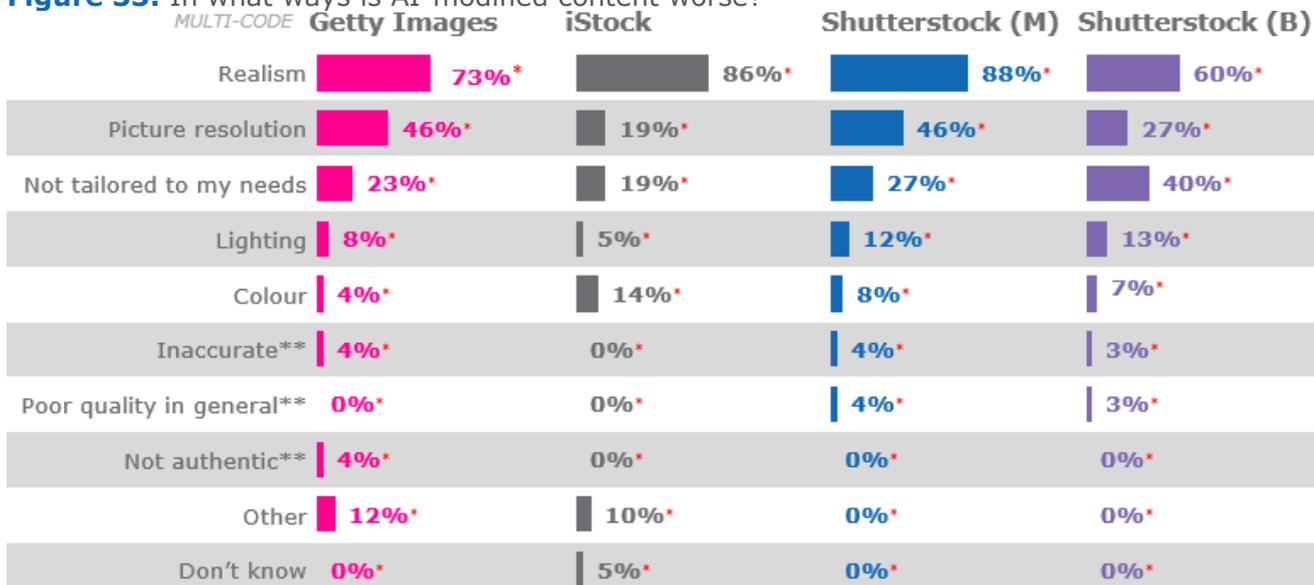
Source. Q27. And in what way(s) were the AI-created/generated images or videos worse? **Base:** those who say much or slightly worse. Getty Images (n=29), iStock (n=37), Shutterstock Marketplace (n=40), Shutterstock Business Solutions (n=54). *caution - low base size (<=30).

Respondents who thought AI-generated content was better than stock content were also asked the reasons why; however, the base size is very small (n=25), and therefore, the chart is not included in this report.

Views on why AI-modified content is worse quality

Respondents who thought AI-modified content was worse than unmodified stock content were asked in what ways it was worse. According to customers, realism is by far the main issue with AI-modified content.

Figure 33: In what ways is AI-modified content worse?



Source. Q33b. And in what way(s) were the AI-modified/generated images or videos worse? **Base:** those who say much or slightly worse. Getty Images (n=26), iStock (n=21), Shutterstock Marketplace (n=26), Shutterstock Business Solutions (n=30). *caution - low base size (<=30) **coded from 'other specify'

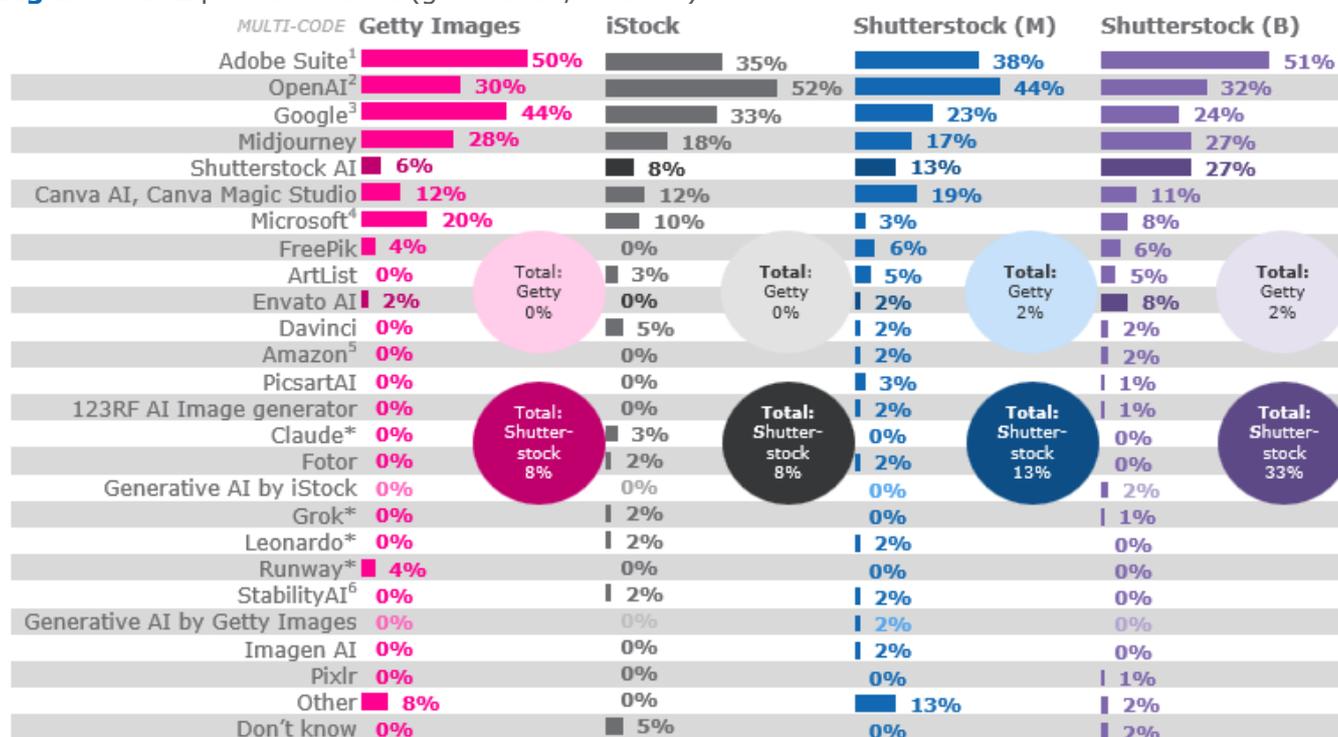


Respondents who thought AI-modified content was better than stock content were also asked the reasons why; however, the base size is very small (n=17), and therefore, the chart is not included in this report.

Providers used for AI-created/generated content

Those who had created content using AI in the last 12 months were asked which providers they had used. The most used providers are Adobe Suite, OpenAI, Google and Midjourney. Use of the Parties' AI tools is very low. However, there is an exception; a third of Shutterstock Business Solutions customers who have used AI-generation tools in the last 12 months have used Shutterstock AI.

Figure 34: AI providers used (generation/creation)



Source. Q28. Which AI provider have you used to create/generate images or videos in the last 12 months?
Base: those who have created/generated AI content in the last 12 months. Getty Images (n=50), iStock (n=60), Shutterstock Marketplace (n=64), Shutterstock Business Solutions (n=84). *coded from 'other specify'

NOTE: 'Total' figures are the percentage of respondents who selected one or more of the Party brands. Getty brands are Getty Images and iStock. Shutterstock brands are Shutterstock and Envato. Respondents who chose multiple options are counted only once. As multiple answers were allowed, totals across options may exceed 100%.

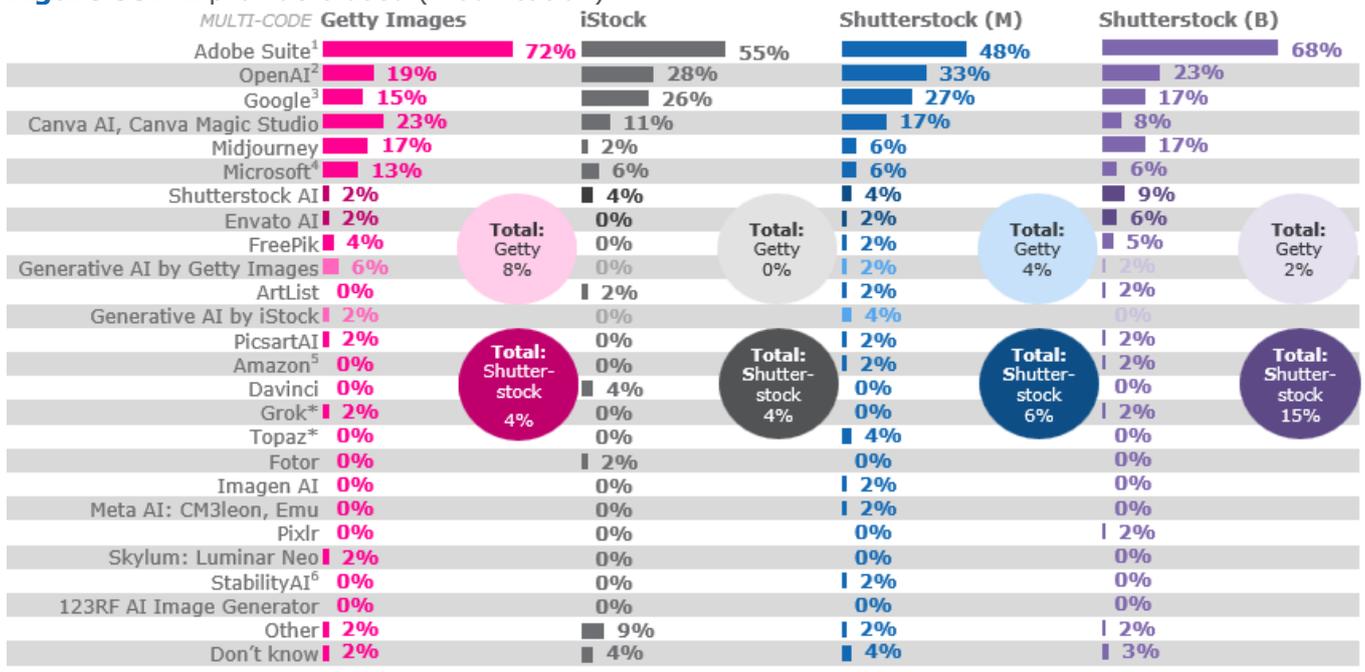
Full answer list codes are: 1 - Adobe Suite (e.g. Firefly, Creative Cloud), 2 - Open AI: ChatGPT, DALL-E, Sora, 3 - Google: Nano Banana, Gemini, Imagen, Veo, 4 - Microsoft Copilot, Microsoft Image Creator from Designer, 5 - Amazon: Titan, Nova, Amazon Ads, 6 - Stability AI: Dreamstudio, Stable Diffusion.

Providers used for AI-modified content

Those who had modified content using AI in the last 12 months were asked which providers they had used. The most used providers are Adobe Suite, OpenAI, Google and Canva AI. Use of the Parties' AI tools is very low, although slightly higher for Shutterstock Business Solutions customers (one in seven who use AI for modification have used Shutterstock AI).



Figure 35: AI providers used (modification)



Source. Q34. In the last 12 months, which of the following AI providers have you used to modify images or videos? **Base:** those who have modified images or videos using AI in the last 12 months. Getty Images (n=53), iStock (n=47), Shutterstock Marketplace (n=52), Shutterstock Business Solutions (n=66). *coded from 'other specify'

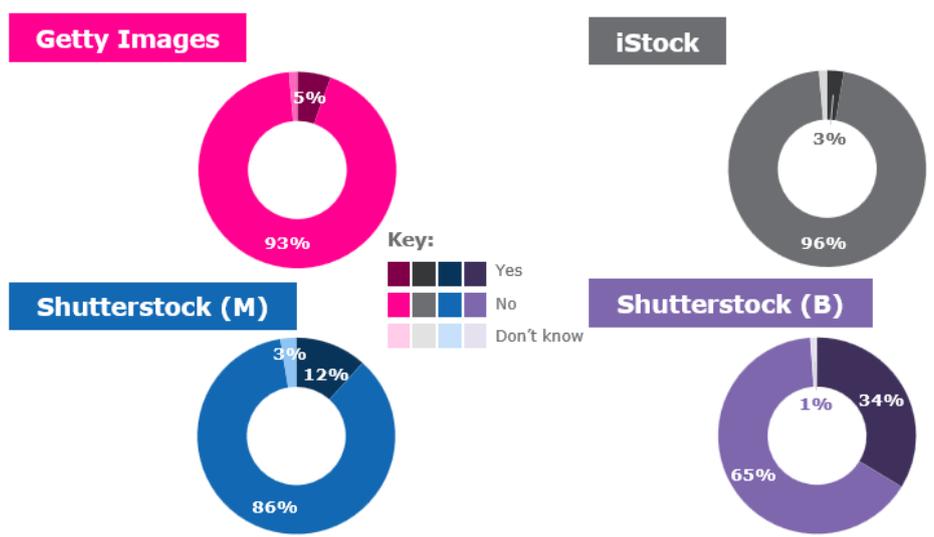
NOTE: 'Total' figures are the percentage of respondents who selected one or more of the Party brands. Getty brands are Getty Images and iStock. Shutterstock brands are Shutterstock and Envato. Respondents who chose multiple options are counted only once. As multiple answers were allowed, totals across options may exceed 100%.

Full answer list codes are: 1 - Adobe Suite (e.g. Firefly, Creative Cloud), 2 - Open AI: ChatGPT, DALL-E, Sora, 3 - Google: Nano Banana, Gemini, Imagen, Veo, 4 - Microsoft Copilot, Microsoft Image Creator from Designer, 5 - Amazon: Titan, Nova, Amazon Ads, 6 - Stability AI: Dreamstudio, Stable Diffusion.

Use of sample brand's AI tools

Those who used AI in the last 12 months (either to create/generate or modify content) were asked if they had used their sample brand's AI creation/generation or modification tools. The vast majority have not, with very low usage by Getty Images and iStock customers of their respective brand's AI tools. Use of Shutterstock's AI tools by Shutterstock customers is higher, with one in ten Shutterstock Marketplace customers using them, while a third of Shutterstock Business Solutions customers say they have used them.

Figure 36: Use of <BRAND>'s AI tools



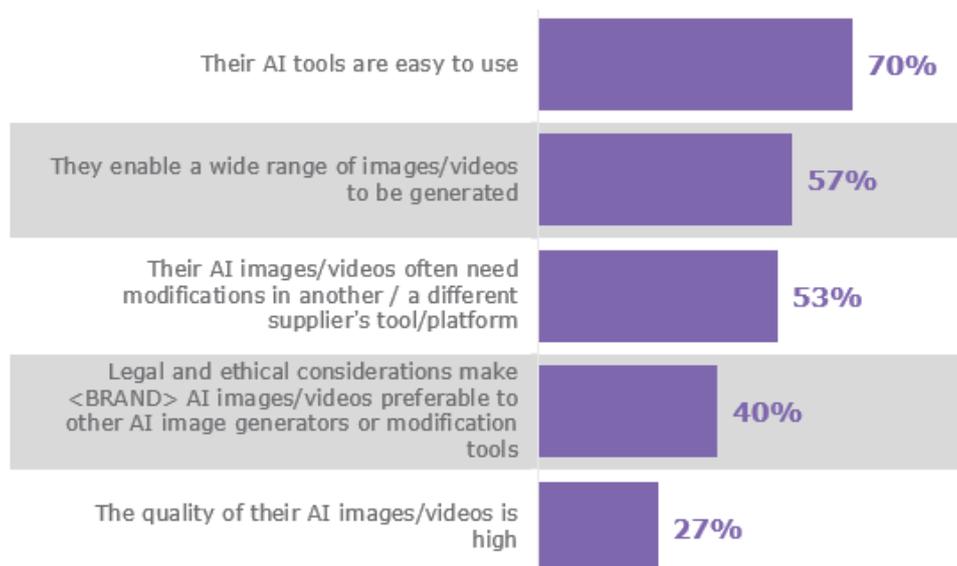


Source. Q35. You said you have used AI to create/generate/modify/create/generate and modify> images or video in the last 12 months. Did you use <BRAND>'s AI-creation/generation or AI-modification tools? **Base:** those who have created/generated or modified content using AI in the last 12 months. Getty Images (n=73), iStock (n=74), Shutterstock Marketplace (n=77), Shutterstock Business Solutions (n=89).

Views on Shutterstock's AI tools

Customers who said they had used the Parties' AI tools were asked to what extent they agreed with a range of statements relating to these AI tools. Results are shown below for Shutterstock Business Solutions customers only, as base sizes for the other strata are too low. For Shutterstock Business Solutions customers, agreement is highest for 'their AI tools are easy to use' and 'they enable a wide range of images/videos to be generated.'

Figure 37: Views on Parties' AI tools (Shutterstock Business Solutions)



Source. Q36. How far do you agree or disagree with the following statements about <BRAND>'s AI images or videos? **Base:** those who did use Parties' AI tools to create/generate or modify images or videos. Shutterstock Business Solutions (n=30). ***caution - low base size (<=30).**

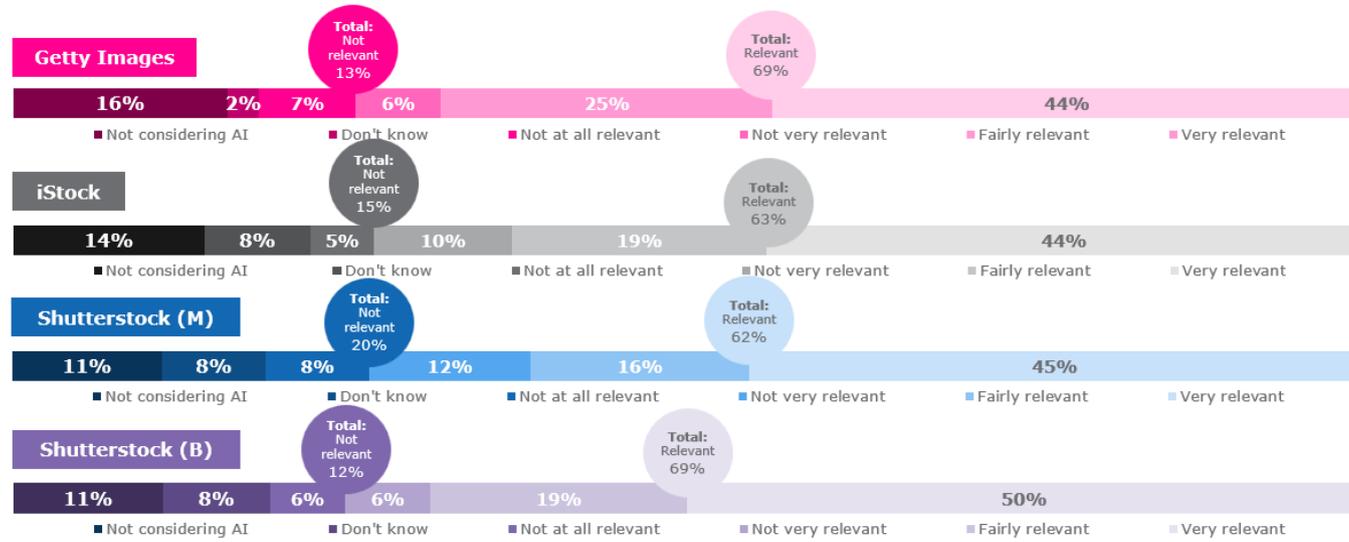
NOTE: Chart shows total percentage of those who 'strongly agree', and 'tend to agree' with each statement.
N.B Charts for other strata not shown due to low base sizes - Getty Images (4), iStock (2), Shutterstock Marketplace (9).



Relevance of consent when using AI to create/generate images

Respondents were asked about the relevance of obtaining consent for images that AI models are trained on (regardless of whether they currently use AI or not). Two-thirds of customers say it is 'fairly' or 'very' relevant (this is even higher for Shutterstock Business Solutions customers at around seven in ten).

Figure 38: Relevance of consent

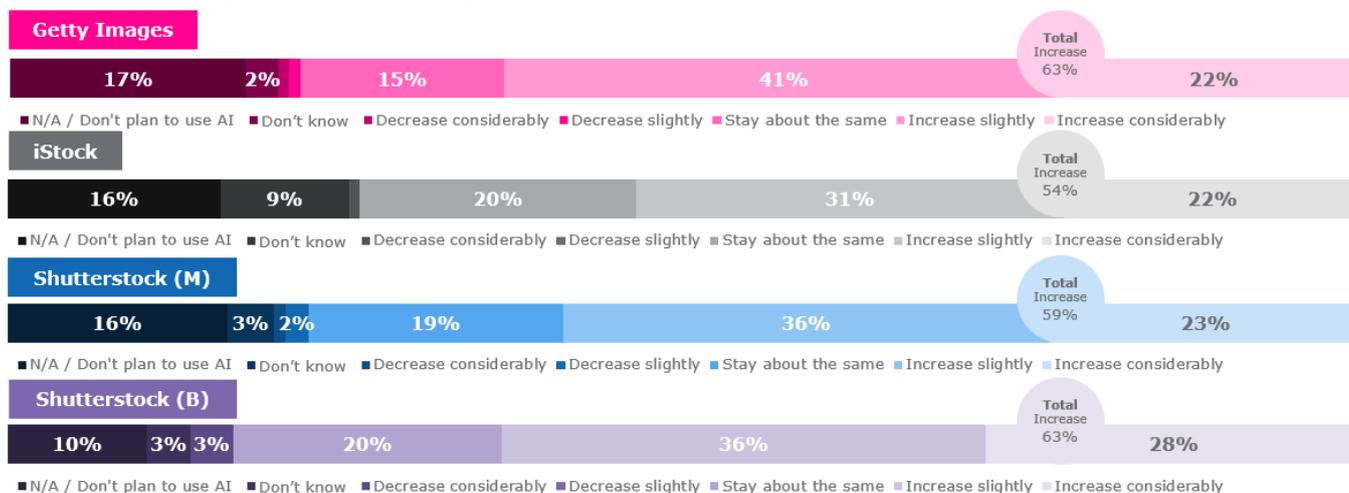


Source. Q37. When considering whether to use AI to create/generate images or videos, how relevant to your decision is it that the AI model has been trained on images obtained with consent? **Base:** all respondents. Getty Images (n=126), iStock (n=127), Shutterstock Marketplace (n=117), Shutterstock Business Solutions (n=126).

Use of AI-creation/generation in future

Respondents were asked whether they expect their usage of AI to increase, stay the same, or decrease over the next two years. All respondents were asked this question regardless of their current usage of AI. Overall, between half and two-thirds expect their use of AI to increase, and around one in five say it will stay the same. One in six say they do not plan to use AI at all (this is lower for Shutterstock Business Solutions customers at around one in ten).

Figure 39: Usage of AI-creation/generation over the next two years



Source. Q38. Looking ahead over the next 2 years, how much, if at all, do you expect your usage of AI to create/generate images or videos to change? **Base:** all respondents. Getty Images (n=126), iStock (n=127), Shutterstock Marketplace (n=117), Shutterstock Business Solutions (n=126). NOTE: 1% data labels removed for neatness.

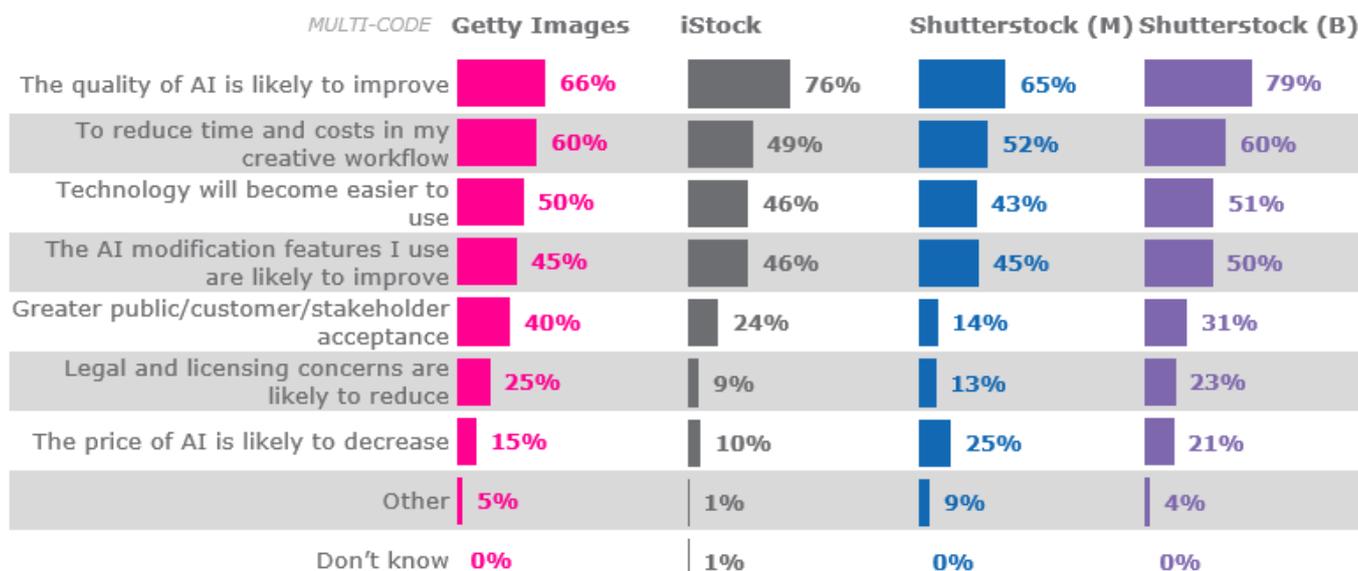
NOTE: 'Total:Increase' is the sum of those who selected increase considerably and increase slightly. Figures may appear not to add to 100% due to rounding.



Reasons for increasing use of AI-created/generated content in future

Those who expect their usage of AI to increase over the next two years were asked the reasons why. The main reasons for increasing usage of AI relate to a perception of improved quality, reducing time and costs, and technology becoming easier to use.

Figure 40: Reasons for increase in AI use over next two years

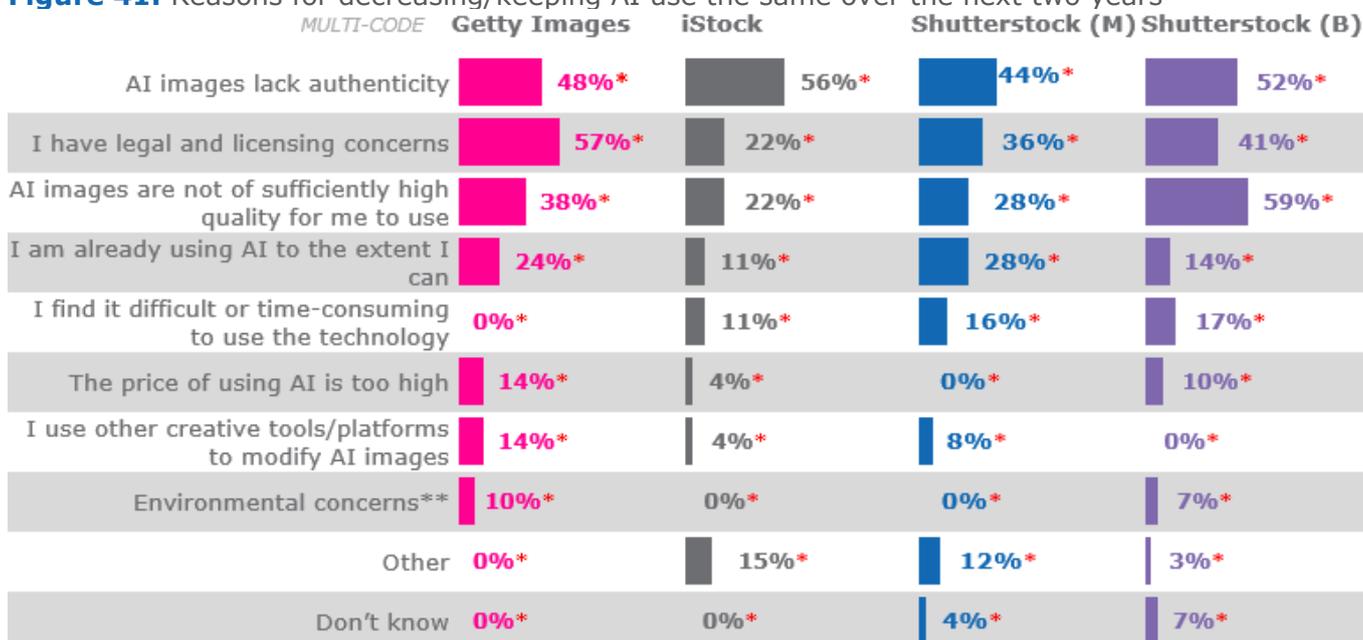


Source. Q39. Why do you expect your usage of AI to create/generate images or videos to increase? **Base:** those who expect usage to increase. Getty Images (n=80), iStock (n=68), Shutterstock Marketplace (n=69), Shutterstock Business Solutions (n=80).

Reasons for decreasing/keeping use of AI-created/generated content the same in future

Those who said they expect their AI usage to decrease or stay the same over the next two years were also asked why. The main reasons are a lack of authenticity for AI images, legal and licensing concerns, and the quality of AI images not being sufficiently high. It is important to note, however, that this question had a low base (n=between 21 and 29), so results should be interpreted with caution.

Figure 41: Reasons for decreasing/keeping AI use the same over the next two years



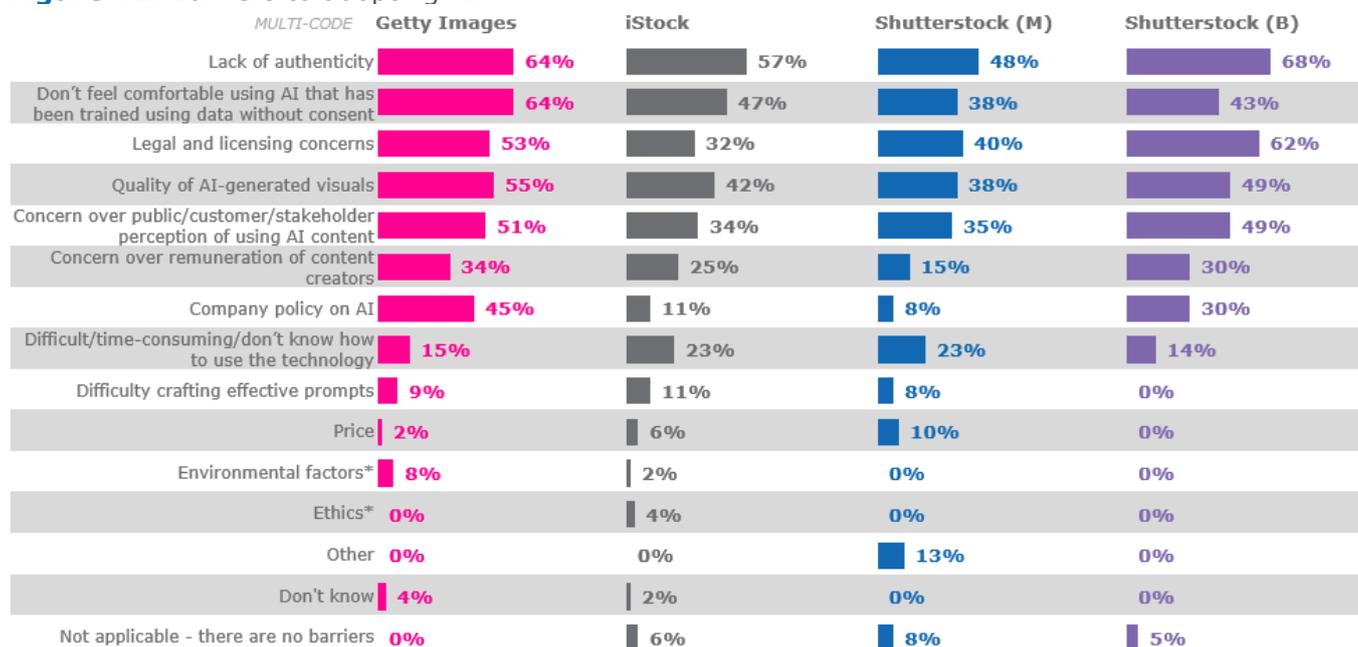
Source. Q40. Why do you expect your usage to stay about the same or decrease? **Base:** those who expect usage to stay the same or decrease. Getty Images (n=21), iStock (n=27), Shutterstock Marketplace (n=25), Shutterstock Business Solutions (n=29). *caution - low base size (<=30) **coded from 'other specify'.



Barriers to adopting AI for content creation/generation

Those who do not currently use AI were asked what the biggest barriers are to adopting AI in their business or organisation. The main barriers are a lack of authenticity, not feeling comfortable using AI trained on data without consent, legal and licensing concerns, and the quality of AI-generated visuals. Getty Images and Shutterstock Business Solutions customers are more likely to say, 'company policy on AI.'

Figure 42: Barriers to adopting AI



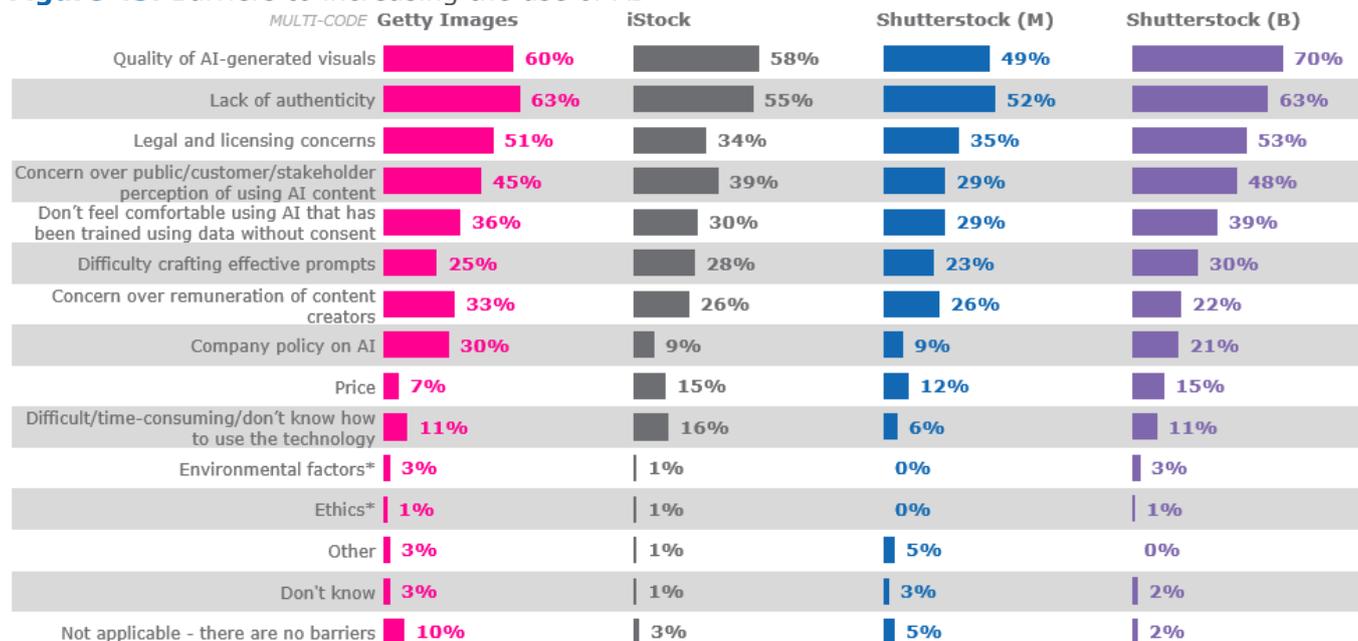
Source. Q41. What, if any, are the biggest barriers to adopting AI image or video creation/generation (in your business/organisation)? **Base:** those who don't use AI. Getty Images (n=53), iStock (n=53), Shutterstock Marketplace (n=40), Shutterstock Business Solutions (n=37). *coded from 'other - specify'



Barriers to increasing use of AI for content creation/generation in future

Those who use AI were also asked about the barriers to increasing their use of AI (wider or more frequent adoption). The main barriers are the quality of AI-generated visuals and a lack of authenticity. One in ten Getty Images customers say there are no barriers to increasing AI use.

Figure 43: Barriers to increasing the use of AI



Source. Q41a. What, if any, are the biggest barriers to wider or more frequent adoption of AI image or video creation/generation (in your business/organisation)? **Base:** those who do use AI. Getty Images (n=73), iStock (n=74), Shutterstock Marketplace (n=77), Shutterstock Business Solutions (n=89).



4 Appendix



Email invitation

CMA
Competition & Markets Authority

Subject line: <BRAND> customers - Share your views for a £25 voucher!

Dear [pull in name from sample],

The Competition and Markets Authority (CMA) is working with DJS Research – an independent market research company – to survey<BRAND> customers of images or video footage.

You may be able to help us with our research!

The CMA is an independent government body and the UK's lead competition and consumer authority. Currently, the CMA is gathering evidence in relation to certain suppliers of images/video content. If you're eligible to take part in the survey, you'll help to ensure that the views and experiences of people like you are fully and accurately reflected in the CMA's conclusions.

The CMA will be very grateful for your help with this research, although taking part is completely optional. The survey is online, you can fill it in using a PC, laptop, tablet, or mobile phone, and it should take about 10 minutes to complete.

Everyone who is eligible to answer the questionnaire in full and submits a response by **Friday 23rd January** will receive **£25** as a thank you for their time (either as GiftPay voucher payable to them or as a donation to charity).

Your personal data and survey answers will be used and stored (processed) fully in line with the UK GDPR. **Before you click on the survey link, it's important that you first read the information below about data protection.**

[Click here to go to the survey](#)
(where further details about the £25 payment are also provided)

Thank you very much for your help with this research – we look forward to receiving your answers.

djs
research

More about the CMA, your personal data, and data protection

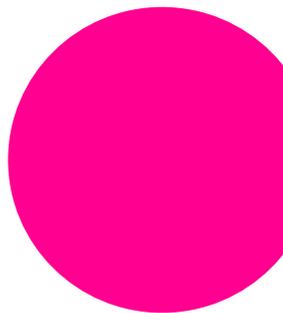
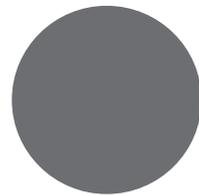
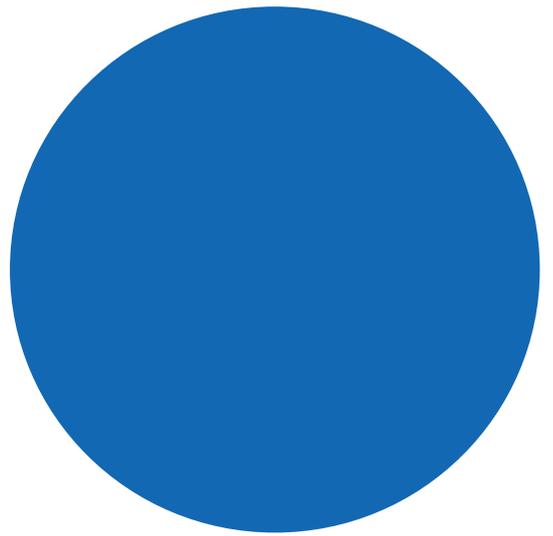
As part of its work, the CMA often asks consumers in a particular market to take part in research. To inform the evidence-gathering for its inquiry into certain suppliers of image and video content, the CMA has asked DJS Research to contact a sample of <BRAND>'s customers.

Under s109 of the Enterprise Act 2002, the CMA has statutory (legal) powers to obtain customer lists from parties to a CMA inquiry, and to share these lists with a research supplier for use as a sample. On this occasion, we have used our powers to require [brand] to supply the names, contact details and transaction details for customers who have downloaded image and video content from them in the last 12 months. You were randomly sampled as a customer of <BRAND>.

Personal data is data that allows an individual to be identified (either directly or indirectly). Your name and contact details are directly disclosive of you as an individual and therefore the CMA and its research supplier (as the CMA's agent) is processing your personal data. The CMA's legal basis for processing customers' personal data is that the processing is necessary for the performance of a task carried out in the public interest (public task) or in the exercise of official authority vested in the controller (GDPR Article 6e). The personal data provided is the minimum required for the CMA's legal purposes, comprising your name, email address, phone number (where available), spend with <BRAND> in the past year, and information relating to your usage over the last year. Because the CMA has statutory (legal) powers to process your personal data, the CMA does not need your consent to process your personal data under data protection law.



Questionnaire: Online



Questionnaire: CMA Stock Images Merger



Client name:	CMA
Project name:	Stock Images Merger
Job number:	10717
Methodology:	Online (CAWI)
Version	6

Notes on this document

- Instructions in **CAPS** are for computer programming
- Instructions in *italics* are for telephone interviewers
- **Bold** or underlined words are for emphasis within a question
- Different question types have different numbers:
 - Screener questions are labelled S01, S02, S03 etc.
 - Main survey questions are labelled Q01, Q02, Q03 etc.
 - Further demographic / classification questions are labelled C01, C02, C03 etc.
 - Number codes are included on each question for data processing purposes

Introduction

DJS Research, an independent market research company, is conducting this survey on behalf of the Competition and Markets Authority (CMA) with users of image or video content. You have received this survey as you purchased/downloaded an image or video from <BRAND> in the last 12 months.

If you have any queries about the research, you can contact us at cmasurvey@djsresearch.com or on 01663 767857.

Everyone who is eligible to answer the questionnaire in full and submits a response by **Friday 23rd January 2026** will receive **£25** as a thank you for their time (either as a GiftPay voucher payable to them or as a donation to charity).

For convenience, you can stop and return to complete the questionnaire as many times as you like but once it's submitted you won't be able to enter the survey again.

QUOTAS –TOTAL 480 INTERVIEWS

AUDIENCE	QUOTA LIMIT	TAKEN FROM WHERE?
Getty Images	120	FROM SAMPLE
iStock	120	FROM SAMPLE
Shutterstock Business Solutions	120	FROM SAMPLE
Shutterstock Marketplace	120	FROM SAMPLE

Screener

DP NOTE: Where <BRAND> appears show brand from sample. E.g. Getty Images / iStock / Shutterstock

S01a.

Base: all respondents

We are unable to interview people under the age of 18. Can you confirm you are over 18?

Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No	SCREEN OUT	
86	Prefer not to say	SCREEN OUT	

INFO.1.

Base: all respondents

The following questions are about images or videos related to **creative or commercial content**. This excludes editorial content (i.e. images of news, entertainment or sports events used to illustrate news stories or other coverage).

S02.

Base: all respondents

According to the information we have, you purchased/downloaded an image or video from <BRAND> on <SAMPLE DATE>.

Do you remember making that purchase/download?

Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No – but I have made at least one purchase / download from <BRAND> in the last 12 months (please tell us when – a rough idea is fine if you can't remember exactly)	TEXT RESPONSE MM/YYYY (DP NOTE: ENSURE YEAR CAN ONLY BE 2024/25)	
3	No – and I have not made any purchase / download from <BRAND> in the last 12 months	SCREEN OUT	
85	Don't know	SCREEN OUT	

S04a.**Base: all respondents**

Thinking again about this occasion, was the image or video content you purchased/downloaded from <BRAND> for use within the UK (as opposed to use within other countries)?

Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Yes – for use in the UK only	INFO NewA	
2	Yes – for use in the UK and outside the UK	INFO NewA	
3	No – for use outside the UK only (but I have made at least one purchase / download from <BRAND> for use in the UK in the last 12 months)	INFO NewA	
4	No – for use outside the UK only (and I have not made any purchase / download from <BRAND> for use in the UK in the last 12 months)	SCREEN OUT	
85	Don't know	SCREEN OUT	

INFO NewA.**Base: all respondents**

As you answer the following questions, please continue to think about your most recent purchase/download of image or video content from <BRAND> which was for use in the UK.

S06.**Base: all respondents**

Who would you say took the lead on the decision to use <BRAND> on this occasion?

Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Me – I took the lead		
2	Someone else/others took the lead	INFO 2	
3	It was a joint decision involving me and someone else/others		
85	Don't know/can't remember	SCREEN OUT	



S07.

Base: those who were involved in the decision (S06/1,3)

Which of the following statements best describes how you reached the decision to use <BRAND> for image or video content on this occasion?

Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	I / we had a completely free choice of which supplier to use		
2	I / we chose which supplier to use from the selection of suppliers that my / our business/organisation makes available		
3	I / we used <BRAND> because it's the only supplier that my / our business/organisation makes available		
85	Don't know/can't remember	SCREEN OUT	

S08.

Base: those who used the only supplier that is made available (S07/3)

Did you have any influence over/involvement in the decision by your business/organisation to use <BRAND> as its only image or video content supplier?

Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No	INFO 2	
85	Don't know/can't remember	INFO 2	

S05.

Base: all respondents

In the last 12 months, has the image or video content you've purchased/downloaded from <BRAND> been for...?

Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Commercial use only	INFO NewB	
2	Personal/non-commercial use only	INFO NewB	
3	A mix of both commercial and personal/non-commercial use	INFOx	
85	Don't know	SCREEN OUT - INFO2B	

INFO2.

Base: those who were not involved in choice of supplier (S06/2) or who had no influence over choice of supplier (S08/2 or S08/85)

Thank you for answering our questions so far. Our main questionnaire is for customers with an involvement in the decision about which image or video content supplier to use so there's nothing further that we need to ask you today.

It is really important to the CMA that we talk to someone from your business/organisation. We would be grateful if you could ask someone who **was** involved in the decision to use <BRAND> to contact us at their earliest convenience in order to take part in the survey. Please ask them to contact us at cmasurvey@djsresearch.com quoting <reference no.>

INFO2B.

Base: S05/85

Unfortunately, you don't qualify for our survey. Thank you for taking the time to answer our questions so far.

INFO NewB.

Base: those who have purchased/downloaded for commercial use only (S05/1) or personal/non-commercial use only (S05/2)

Please continue to think about the most recent occasion when you purchased/downloaded image or video content from <BRAND> for use in the UK.

INFOx.

Base: those who have purchased/downloaded for both commercial and personal/non-commercial use (S05/3)

As you answer the following questions, please think about the most recent occasion when you purchased/downloaded image or video content from <BRAND> for **commercial use in the UK**.

S03.

Base: all respondents

On this occasion, did you make the purchase/download...?

Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	For your own use only		
2	For someone else's use only		
3	For use by you and someone else		
85	Don't know/can't remember	SCREEN OUT - INFO2C	

INFO2C.

Base: S03/85

Unfortunately, you don't qualify for our survey. Thank you for taking the time to answer our questions so far.

Main questionnaire: Usage and subscriptions

Q01.

Base: all respondents

How <IF S05/2: do you/IF S05/1,3: does your business/organisation> pay for image or video content from <BRAND>?

Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Using a subscription (i.e. annual or monthly fee)		
2	Using a different method (a la carte, credit pack or image pack)		
80	Other (please specify)	TEXT RESPONSE	
85	Don't know		

Q02.

Base: all respondents

Thinking about the most recent occasion when you purchased/downloaded image or video content from <BRAND> for <IF S05/3: commercial> use in the UK, was that image or video content used with any design, editing or marketing tool or platform to produce your/someone else's end work or project?

Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Yes, Adobe		
2	Yes, Affinity		
3	Yes, Canva		
4	Yes, Picsart		
80	Yes, another tool/platform (please specify)	TEXT RESPONSE	
87	No		
85	Don't know		

Q03.

Base: all respondents

Where <IF S05/2: have you/IF S05/1,3: has your business/organisation> sourced image or video content from in the last 12 months?

Please select all that apply.

MULTI RESPONSE, RANDOMISED

Code	Answer list	Scripting notes	Routing
1	AI image generators		
2	Free image or video supplier(s)		
3	Paid image or video supplier(s)		
4	Design or marketing tool/platform (e.g. Adobe, Canva)		
5	Marketing and advertising platforms (e.g. Meta, Hubspot)		
6	We commission bespoke images or videos		
7	We produce images or videos in-house		
8	Our own collection of images or videos		
80	Other (please specify)	TEXT RESPONSE, FIXED	
85	Don't know	EXCLUSIVE, FIXED	

Q04a.

Base: all respondents

In the last 12 months, which of the following suppliers (if any) <IF S05/2: have you/IF S05/1,3: has your business/organisation> obtained **paid** images or videos from **using a subscription (i.e. annual or monthly fee)**?

Please select all that apply.

MULTI RESPONSE, ORDERED

Code	Rows	Scripting notes	Routing
1	123RF		
2	Adobe		
3	Artlist		
4	Bigstock		
5	Canva		
6	DepositPhotos		
7	Dissolve		
8	Dreamstime		
9	Envato		
10	Freepik		
11	Getty Images	HIDE FOR GETTY IMAGES SAMPLE AND IF Q01/1 or Q01/85	
12	IMAGO		
13	iStock	HIDE FOR ISTOCK SAMPLE AND IF Q01/1 or Q01/85	

14	PA Media/Alamy		
15	Pixta		
16	Pond5		
17	Shutterstock	HIDE FOR SHUTTERSTOCK SAMPLE AND IF Q01/1 or Q01/85	
18	Stocksy		
19	StoryBlocks		
20	Unsplash		
21	Vecteezy		
80	Other (please specify)	TEXT RESPONSE	
85	Don't know	EXCLUSIVE	
87	None of the above	EXCLUSIVE	

Q04b.

Base: all respondents

In the last 12 months, which of the following suppliers (if any) <IF S05/2: have you/IF S05/1,3: has your business/organisation> obtained **paid** images or videos from **using a different method to subscription (e.g. a la carte, credit pack or image pack)?**

Please select all that apply.

MULTI RESPONSE, ORDERED

Code	Rows	Scripting notes	Routing
1	123RF		
2	Adobe		
3	Artlist		
4	Bigstock		
5	Canva		
6	DepositPhotos		
7	Dissolve		
8	Dreamstime		
9	Envato		
10	Freepik		
11	Getty Images	HIDE FOR GETTY SAMPLE IF Q01 = 2, 85	
12	IMAGO		
13	iStock	HIDE FOR ISTOCK SAMPLE IF Q01 = 2, 85	
14	PA Media/Alamy		
15	Pixta		
16	Pond5		
17	Shutterstock	HIDE FOR SHUTTERSTOCK SAMPLE IF Q01 = 2, 85	
18	Stocksy		
19	StoryBlocks		
20	Unsplash		
21	Vecteezy		
80	Other (please specify)	TEXT RESPONSE	
85	Don't know	EXCLUSIVE	
87	None of the above	EXCLUSIVE	

Q05.

Base: those who select one supplier other than the one they use from the sample (across Q04a or Q04b) excl. Q04a/85,87 or Q04b/85,87

Please explain why <IF S05/2: you use/IF S05/1,3: your business/organisation uses> multiple suppliers of image or video content?

Please select all that apply.

MULTI RESPONSE, RANDOMISE

Code	Answer list	Scripting notes	Routing
1	To increase the range of image or video content available		
2	To take advantage of different categories / content types / strengths of different suppliers		
3	Different individual preferences		
4	To give me a range of tools beyond images or videos		
5	A supplier I use/my organisation uses has bundled in image/video content with something I/my business/organisation already purchases		
6	Overall cost advantages		
7	Downloading/technical reasons		
8	Access to premium content		
80	Other (please specify)	TEXT RESPONSE, FIXED	
85	Don't know	EXCLUSIVE, FIXED	

Q06.

Base: all respondents

In the last 12 months, for which of the following (if any) <IF S05/2: have you/IF S05/1,3: has your business/organisation> used **paid** image or video content?

Please select all that apply.

MULTI RESPONSE, RANDOMISE

Code	Answer list	Scripting notes	Routing
1	Planning		
2	Internal presentations		
3	Social media content		
4	Advertising or marketing – web	KEEP CODES 4-7 TOGETHER	
5	Advertising or marketing – print		
6	Advertising or marketing – TV and broadcast		
7	Advertising or marketing – social media		
8	Print collateral and material (e.g. flyers, magazines)		

9	In an editorial manner, using creative content to cover a topic or story		
10	TV and broadcast		
11	Game development/Concept art		
80	Other (please specify)	TEXT RESPONSE, FIXED	
85	Don't know	EXCLUSIVE, FIXED	

Q07.

Base: all respondents

How many times, if at all, <IF S05/2: have you/IF S05/1,3: has your business/organisation> used **free** image or video content in the last 12 months? A rough idea is fine if you don't know the exact number.

Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	0 – not used any free image and/or video content in the last 12 months		
2	1-4 times		
3	5-10 times		
4	11-50 times		
5	More than 50 times		
85	Don't know		

Q08.

Base: those who use free content (Q07/2-5)

In the last 12 months, what <IF S05/2: have you/IF S05/1,3: has your business/organisation> used **free** image or video content for?

Please select all that apply.

MULTI RESPONSE, RANDOMISE

Code	Answer list	Scripting notes	Routing
1	Planning		
2	Internal presentations		
3	Social media content		
4	Advertising or marketing – web	KEEP CODES 4-7 TOGETHER	
5	Advertising or marketing – print		
6	Advertising or marketing – TV and broadcast		
7	Advertising or marketing – social media		
8	Print collateral and material (e.g. flyers, magazines)		
9	In an editorial manner, to cover a topic or story		
10	TV and broadcast		
11	Game development/Concept art		

80	Other (please specify)	TEXT RESPONSE, FIXED	
85	Don't know	EXCLUSIVE, FIXED	

Q09 REMOVED DURING DRAFTING

Q10 REMOVED DURING DRAFTING

Q11.

Base: all respondents

In the last 12 months, have you personally used AI to **create/generate** images or videos (as opposed to modifying them)?

Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No		
85	Don't know		

Q12.

Base: all respondents

In the last 12 months, have you personally used AI to **modify** existing images or videos?

Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No		
85	Don't know		

Main questionnaire: Choice Factors

INFO NewC.

Base: those who have purchased/downloaded for commercial use only (S05/1) or personal/non-commercial use only (S05/2)

Please continue to think about the most recent occasion when you purchased/downloaded image or video content from **<BRAND>** for use in the UK.

INFO NewD.

Base: those who have purchased/downloaded for both commercial and personal/non-commercial use (S05/3)

Please continue to think about the most recent occasion when you purchased/downloaded image or video content from **<BRAND>** for commercial use in the UK.

Q13.**Base: those who had a free choice to use suppliers (S07/1-2)**

You said you were personally involved in the decision to choose <BRAND> from <IF S7/1: a completely free choice of suppliers/IF S7/2: the selection of suppliers your business/organisation makes available>.

Why did you choose to use <BRAND> on this occasion, rather than a different supplier/source?

Please select all that apply.

MULTI RESPONSE, RANDOMISE

Code	Answer list	Scripting notes	Routing
1	The price		
2	They had a particular image/video content library that suited my / our need		
3	Purchasing arrangement (e.g. product package flexibility)		
4	Their content was appropriately licensed (owner's permission to use)		
5	<BRAND> offered legal/financial protection (indemnity)		
6	The range of images/video available		
7	Ease of downloading		
8	Search functionality		
9	Resolution of images/videos		
10	Quality of image/video content		
11	Uniqueness of image/video content (images/videos not available elsewhere)		
12	The availability of premium content		
13	Availability of generative AI tools or content on the platform		
14	Availability of editorial visual content/content alongside creative visual content		
80	Other (please specify)	TEXT RESPONSE, FIXED	
85	Don't know	EXCLUSIVE, FIXED	

Q13a.**Base: those who used only supplier available (S07/3)**

You said you had influence over/involvement in the decision by your business/organisation to use <BRAND> as its only image or video content supplier.

Thinking back to when you made the decision to use <BRAND> why did you choose <BRAND> rather than a different supplier/source?

Please select all that apply.

MULTI RESPONSE, RANDOMISE

Code	Answer list	Scripting notes	Routing
1	The price		
2	They had a particular image/video content library that suited my / our need		
3	Purchasing arrangement (e.g. product package flexibility)		
4	Their content was appropriately licensed (owner's permission to use)		
5	<BRAND> offered legal/financial protection (indemnity)		
6	The range of images/video available		
7	Ease of downloading		
8	Search functionality		
9	Resolution of images/videos		
10	Quality of image/video content		
11	Uniqueness of image/video content (images/videos not available elsewhere)		
12	The availability of premium content		
13	Availability of generative AI tools or content on the platform		
14	Availability of editorial visual content/content alongside creative visual content		
80	Other (please specify)	TEXT RESPONSE, FIXED	
85	Don't know	EXCLUSIVE, FIXED	

Q14.

Base: those who choose more than one reason at Q13

And which was the MAIN REASON for choosing <BRAND> on this occasion?

Please select one answer.

SINGLE RESPONSE, RANDOMISED AS PER Q13 (OF THOSE SELECTED)

Code	Answer list	Scripting notes	Routing
1	The price	ONLY SHOW IF SELECTED AT Q13	
2	They had a particular image/video content library that suited my / our need		
3	Purchasing arrangement (e.g. product package flexibility)		
4	Their content was appropriately licensed (owner's permission to use)		
5	<BRAND> offered legal/financial protection (indemnity)		
6	The range of images/video available		
7	Ease of downloading		
8	Search functionality		
9	Resolution of images/videos		

10	Quality of image/video content		
11	Uniqueness of image/video content (images/videos not available elsewhere)		
12	The availability of premium content		
13	Availability of generative AI tools or content on the platform		
14	Availability of editorial visual content/content alongside creative visual content		
80	<PULL THROUGH FROM Q13/80>		
85	Don't know	FIXED	

Q14a.

Base: those who choose more than one reason at Q13a

And which was the MAIN REASON for choosing <BRAND>?

Please select one answer.

SINGLE RESPONSE, RANDOMISED AS PER Q13a (OF THOSE SELECTED)

Code	Answer list	Scripting notes	Routing
1	The price	ONLY SHOW IF SELECTED AT Q13a	
2	They had a particular image/video content library that suited my / our need		
3	Purchasing arrangement (e.g. product package flexibility)		
4	Their content was appropriately licensed (owner's permission to use)		
5	<BRAND> offered legal/financial protection (indemnity)		
6	The range of images/video available		
7	Ease of downloading		
8	Search functionality		
9	Resolution of images/videos		
10	Quality of image/video content		
11	Uniqueness of image/video content (images/videos not available elsewhere)		
12	The availability of premium content		
13	Availability of generative AI tools or content on the platform		
14	Availability of editorial visual content/content alongside creative visual content		
80	<PULL THROUGH FROM Q13a/80>		
85	Don't know	FIXED	

Main questionnaire: Diversion

INFO NewE.

Base: those who have purchased/downloaded for commercial use only (S05/1) or personal/non-commercial use only (S05/2) AND used the only supplier made available (S07/3)

Please continue to think about the most recent occasion when you purchased/downloaded image or video content from <BRAND> for use in the UK.

INFO NewF.

Base: those who have purchased/downloaded for both commercial and personal/non-commercial use (S05/3) AND used the only supplier made available (S07/3)

Please continue to think about the most recent occasion when you purchased/downloaded image or video content from <BRAND> for **commercial use** in the UK.

Q15.

Base: all respondents

Thinking back to when you made your decision to purchase/download image or video content from <BRAND> on this occasion ...

If that supplier had not been available, and taking account of all the options that might be available to you, what are you most likely to have done instead?

Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	I would have purchased the content from a different paid image/video supplier		
2	I would have downloaded content from a free image/video supplier		
3	I would have generated content using AI		
4	I would have produced the image/video in-house		
5	I would not have used anything		
6	I would have done something else (please specify)	TEXT RESPONSE	
85	Don't know		

Q16.**Base: those who would have downloaded free content from elsewhere (Q15/2)**

Which supplier would you have sourced free image or video content from instead?

*Please select one answer.***SINGLE RESPONSE, ORDERED**

Code	Answer list	Scripting notes	Routing
1	Burst		
2	Canva		
3	Coverr		
4	Freefoodphotos		
5	Freerangestock		
6	Freepik		
7	Goodstockphotos		
8	Gratisography		
9	Life of Pix		
10	Morguefile		
11	Negative Space		
12	Pexels		
13	Picography		
14	Picwizard		
15	Pixabay		
16	Pixy		
17	RgbStock		
18	StockSnap		
19	Unsplash		
20	Vecteezy		
80	Other (please specify)	TEXT RESPONSE	
85	Don't know		

Q17.**Base: those who would have purchased from a different brand (Q15/1)**

Which supplier would you have bought image or video content from instead?

*Please select one answer.***SINGLE RESPONSE, ORDER ALPHABETICALLY**

Code	Answer list	Scripting notes	Routing
1	123RF		
2	Adobe		
3	Artlist		
4	DepositPhotos		
5	PA Media/Alamy		
6	Bigstock		
7	Canva		
8	Dreamstime		
9	Envato		
10	Freepik		
11	Getty Images	HIDE IF GETTY IMAGES SAMPLE (BUT RETAIN iStock)	

12	iStock	HIDE IF iStock SAMPLE (BUT RETAIN GETTY IMAGES)	
13	Pixta		
14	Pond5		
15	Shutterstock	HIDE FOR SHUTTERSTOCK SAMPLE (BUSINESS SOLUTIONS AND MARKETPLACE)	
16	Stocksy		
17	StoryBlocks		
18	Dissolve		
19	IMAGO		
20	Unsplash		
21	Vecteezy		
80	Other (please specify)	TEXT RESPONSE	
85	Don't know		

Q18a.

Base: If GETTY IMAGES sample and select iStock (Q17/12) or Unsplash (Q17/20)

Getty owns Getty Images, iStock and Unsplash. If none of the brands owned by Getty were available, what are you most likely to have done instead?

Q18b.

Base: If iStock sample and select GETTY IMAGES (Q17/11) or Unsplash (Q17/20)

Getty owns iStock, Getty Images and Unsplash. If none of the brands owned by Getty were available, what are you most likely to have done instead?

Q18c.

Base: If SHUTTERSTOCK sample and select BIGSTOCK, ENVATO OR POND5 (Q17/6,9,14)

Shutterstock owns Bigstock, Envato and Pond5. If none of the brands owned by Shutterstock were available, what are you most likely to have done instead?

Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	I would have purchased the content from a different paid image/video supplier		
2	I would have downloaded content from a free image/video supplier		
3	I would have generated content using AI		
4	I would have produced the image/video in-house		
5	I would not have used anything		
6	I would have done something else (please specify)	TEXT RESPONSE	
85	Don't know		

Q19a.**Base: IF Q18a or Q18b or Q18c/2**Which supplier would you have sourced **free** image or video content from instead?*Please select one answer.***SINGLE RESPONSE, ORDERED**

Code	Answer list	Scripting notes	Routing
1	Burst		
2	Canva		
3	Coverr		
4	Freefoodphotos		
5	Freerangestock		
6	Freepik		
7	Goodstockphotos		
8	Gratisography		
9	Life of Pix		
10	Morguefile		
11	Negative Space		
12	Pexels		
13	Picography		
14	Picwizard		
15	Pixabay		
16	Pixy		
17	RgbStock		
18	StockSnap		
19	Unsplash	HIDE FOR GETTY IMAGES AND ISTOCK SAMPLE	
20	Vecteezy		
80	Other (please specify)	TEXT RESPONSE	
85	Don't know		

Q19b.**Base: IF Q18a or Q18b or Q18c/1**

Which supplier would you have bought image or video content from instead?

*Please select one answer.***SINGLE RESPONSE, ORDER ALPHABETICALLY**

Code	Answer list	Scripting notes	Routing
1	123RF		
2	Adobe		
3	Artlist		
4	DepositPhotos		
5	PA Media/Alamy		
6	Bigstock	HIDE FOR SHUTTERSTOCK SAMPLE	
7	Canva		
8	Dreamstime		
9	Envato	HIDE FOR SHUTTERSTOCK SAMPLE	
10	Freepik		
11	Getty Images	HIDE FOR GETTY IMAGES AND iStock SAMPLE	

12	iStock	HIDE FOR iStock AND GETTY IMAGES SAMPLE	
13	Pixta		
14	Pond5	HIDE FOR SHUTTERSTOCK SAMPLE	
15	Shutterstock	HIDE FOR SHUTTERSTOCK SAMPLE	
16	Stocksy		
17	StoryBlocks		
18	Dissolve		
19	IMAGO		
20	Unsplash	HIDE FOR GETTY IMAGES AND iStock SAMPLE	
21	Vecteezy		
80	Other (please specify)	TEXT RESPONSE	
85	Don't know		

Q20.

Base: those who would have used AI generation if brand not available (Q15/3 or Q18a or Q18b or Q18c/3)

Which AI generation tool would you have used instead?

Please select one answer.

SINGLE RESPONSE, ORDER ALPHABETICALLY

Code	Answer list	Scripting notes	Routing
1	123RF AI Image Generator		
2	Adobe Suite (e.g., Firefly, Creative Cloud)		
3	Amazon Titan		
4	Canva AI		
5	ChatGPT		
6	ArtList		
7	Davinci		
8	Dreamstudio		
9	Generative AI by Getty Images		
10	Generative AI by iStock		
11	Google Gemini / AI Studio		
12	Meta AI		
13	Midjourney AI		
14	Microsoft Image Creator from Designer		
15	PicsartAI		
16	Shutterstock AI		
80	Other (please specify)	TEXT RESPONSE	
85	Don't know		

Main questionnaire: AI

Q21.

Base: those who have created/generated AI content in the last 12 months (Q11/1)

Earlier, you said that you had used AI to **create/generate** images or videos in the last 12 months.

For what purposes have you used the images or videos that you created with this/these AI tool(s)?

Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	For commercial use only		
2	For personal/non-commercial use only		
3	A mix of both commercial and personal/non-commercial use		
85	Don't know		

INFO. X

Base: those who have created AI content in the last 12 months for both commercial and personal/non-commercial use (Q21/3)

The following questions are about your use of AI tools to **create/generate** images or videos for **commercial** use.

Q22.

Base: those who have created/generated AI content in the last 12 months (Q11/1)

How often have you used AI to **create/generate** images or videos in the last 12 months? A rough idea is fine if you don't know exactly how often.

Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Every day or most days		
2	Once or twice a week		
3	Once or twice a fortnight		
4	Once or twice a month		
5	Once or twice every three months		
6	Once or twice every six months		
7	Once or twice in the last 12 months		
85	Don't know		

Q22a REMOVED DURING DRAFTING

Q23.

Base: those who have created/generated AI content in the last 12 months (Q11/1)

In the last 12 months, what have you used AI-created/generated content for?

Please select all that apply.

MULTI RESPONSE, RANDOMISE

Code	Answer list	Scripting notes	Routing
1	Planning		
2	Internal presentations		
3	Social media content		
4	Advertising or marketing – web	KEEP CODES 4-7 TOGETHER	
5	Advertising or marketing – print		
6	Advertising or marketing – TV and broadcast		
7	Advertising or marketing – social media		
8	Print collateral (e.g. flyers, magazines)		
9	In an editorial manner, using creative content to cover a topic or story		
10	TV and broadcast		
11	Game development/Concept art		
80	Other (please specify)	TEXT RESPONSE, FIXED	
85	Don't know	EXCLUSIVE	

Q24.

Base: those who have created/generated AI content in the last 12 months (Q11/1)

Still thinking about how you have used AI-created/generated content **<IF Q21/1, 3>: for commercial purposes ><IF Q21/2>: <in your personal/non-commercial projects>** in the last 12 months. Which of the following best describes how you have used it?

Please select all that apply.

MULTI RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	In place of stock image/video content		
2	In combination with stock image/video content		
3	Where I/we would not have previously used stock image/video content		
85	Don't know	EXCLUSIVE	

Q25.**Base: those who have created/generated AI content in the last 12 months (Q11/1)**How would you rate the **quality** of the images or videos you created/generated with AI compared with stock images or videos?

In general, the AI-created/generated images or videos were ...

*Please select one option.***SINGLE RESPONSE, ORDERED**

Code	Answer list	Scripting notes	Routing
1	Much better quality		
2	Slightly better quality		
3	About the same quality as stock images/videos		
4	Slightly worse quality		
5	Much worse quality		
85	Don't know		

Q26.**Base: those who say much or slightly better (Q25/1-2)**

And in what way(s) were the AI-created/generated images or videos better?

*Please select all that apply.***MULTI RESPONSE, RANDOMISE**

Code	Answer list	Scripting notes	Routing
1	Picture resolution		
2	Colour		
3	Lighting		
4	Realism		
5	Tailored to my needs		
80	Other (please specify)	TEXT RESPONSE, FIXED	
85	Don't know	EXCLUSIVE, FIXED	

Q27.**Base: those who say slightly or much worse (Q25/4-5)**

And in what way(s) were the AI-created/generated images or videos worse?

*Please select all that apply.***MULTI RESPONSE, RANDOMISE**

Code	Answer list	Scripting notes	Routing
1	Picture resolution		
2	Colour		
3	Lighting		
4	Realism		
5	Not tailored to my needs		
80	Other (please specify)	TEXT RESPONSE, FIXED	
85	Don't know	EXCLUSIVE, FIXED	

Q28.

Base: those who have created/generated AI content in the last 12 months (Q11/1)

Which AI provider have you used to **create/generate** images or videos in the last 12 months?

Please select all that apply.

MULTI RESPONSE, ORDER ALPHABETICALLY

Code	Answer list	Scripting notes	Routing
1	123RF AI Image Generator		
2	Adobe Suite (e.g., Firefly, Creative Cloud)		
3	Amazon: Titan, Nova, Amazon Ads image/video generator		
4	Canva AI, Canva Magic Studio		
5	OpenAI: ChatGPT, DALL-E, Sora		
6	ArtList		
7	Davinci		
16	StabilityAI: Dreamstudio, Stable Diffusion		
17	Envato AI		
18	Fotor		
19	FreePik		
9	Generative AI by Getty Images		
10	Generative AI by iStock		
11	Google: Nano Banana, Gemini, Imagen, Veo		
20	Imagen AI		
21	Skylum: Luminar Neo		
12	Meta AI: CM3leon, Emu		
13	Microsoft Copilot, Microsoft Image Creator from Designer		
22	Midjourney		
14	PicsartAI		
23	Pixlr		
15	Shutterstock AI		
80	Other (please specify)	TEXT RESPONSE	
85	Don't know	EXCLUSIVE	

Main questionnaire: Modifying images

Q29.

Base: those who have modified images or videos using AI in the last 12 months (Q12/1)

Earlier, you said that you had used AI to **modify** images or videos in the last 12 months. For what purposes have you used the images or videos that you **modified** with this/these AI tool(s)?

Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	For commercial use only		
2	For personal/non-commercial use only		
3	A mix of both commercial and personal/non-commercial use		
85	Don't know		

INFO. X2

Base: those who have modified images or videos using AI in the last 12 months for both commercial and personal/non-commercial use (Q29/3)

The following questions are about your use of AI tools to **modify** images or videos for **commercial** use.

Q30.

Base: those who have modified images or videos using AI in the last 12 months (Q12/1)

How often have you used AI to modify images or videos in the last 12 months? A rough idea is fine if you don't know exactly how often.

Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Every day or most days		
2	Once or twice a week		
3	Once or twice a fortnight		
4	Once or twice a month		
5	Once or twice every three months		
6	Once or twice every six months		
7	Once or twice in the last 12 months		
85	Don't know		

Q31 REMOVED DURING DRAFTING

Q31a.

Base: those who have modified images or videos using AI in the last 12 months (Q12/1)

In the last 12 months, what have you used AI-modified content for?

Please select all that apply.

MULTI RESPONSE, RANDOMISE

Code	Answer list	Scripting notes	Routing
1	Planning		
2	Internal presentations		
3	Social media content		
4	Advertising or marketing – web	KEEP CODES 4-7 TOGETHER	
5	Advertising or marketing – print		
6	Advertising or marketing – TV and broadcast		
7	Advertising or marketing – social media		
8	Print collateral (e.g. flyers, magazines)		
9	In an editorial manner, using creative content to cover a topic or story		
10	TV and broadcast		
11	Game development/Concept art		
80	Other (please specify)	TEXT RESPONSE, FIXED	
85	Don't know	EXCLUSIVE	

Q32.

Base: those who have modified images or videos using AI in the last 12 months (Q12/1)

Still thinking about how you have used AI-modified content, how often (if at all) have you used **paid-for** stock image or video content, rather than any other image or video content (for example, in-house photography/video or free image/video content), as a **starting image or video**?

Please select one option.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Always		
2	More often than not		
3	About half the time		
4	Less often than not		
5	Never		
85	Don't know		

Q33.**Base: those who have modified images or videos using AI in the last 12 months (Q12/1)**How would you rate the **quality** of the AI-modified images or videos you made compared with unmodified stock images or videos?

In general, the AI-modified images or videos were ...

*Please select one option.***SINGLE RESPONSE, ORDERED**

Code	Answer list	Scripting notes	Routing
1	Much better quality		
2	Slightly better quality		
3	About the same quality as unmodified stock images/videos		
4	Slightly worse quality		
5	Much worse quality		
85	Don't know		

Q33a.**Base: those who say much or slightly better (Q33/1-2)**

And in what way(s) were the AI-generated images or videos better?

*Please select all that apply.***MULTI RESPONSE, RANDOMISE**

Code	Answer list	Scripting notes	Routing
1	Picture resolution		
2	Colour		
3	Lighting		
4	Realism		
5	Tailored to my needs		
80	Other (please specify)	TEXT RESPONSE, FIXED	
85	Don't know	EXCLUSIVE, FIXED	

Q33b.**Base: those who say slightly or much worse (Q33/4-5)**

And in what way(s) were the AI-generated images or videos worse?

*Please select all that apply.***MULTI RESPONSE, RANDOMISE**

Code	Answer list	Scripting notes	Routing
1	Picture resolution		
2	Colour		
3	Lighting		
4	Realism		
5	Not tailored to my needs		
80	Other (please specify)	TEXT RESPONSE, FIXED	
85	Don't know	EXCLUSIVE, FIXED	

Q34.

Base: those who have modified images or videos using AI in the last 12 months (Q12/1)

In the last 12 months, which of the following AI providers have you used to **modify** images or videos?

Please select all that apply.

MULTI RESPONSE, ORDER ALPHABETICALLY

Code	Answer list	Scripting notes	Routing
1	123RF AI Image Generator		
2	Adobe Suite (e.g., Firefly, Creative Cloud)		
3	Amazon: Titan, Nova, Amazon Ads image/video generator		
4	Canva AI, Canva Magic Studio		
5	OpenAI: ChatGPT, DALL-E, Sora		
6	ArtList		
7	Davinci		
8	StabilityAI: Dreamstudio, Stable Diffusion		
9	Envato AI		
10	Fotor		
11	FreePik		
12	Generative AI by Getty Images		
13	Generative AI by iStock		
14	Google: Nano Banana, Gemini, Imagen, Veo		
15	Imagen AI		
16	Skylum: Luminar Neo		
17	Meta AI: CM3leon, Emu		
18	Microsoft Copilot, Microsoft Image Creator from Designer		
19	Midjourney		
20	PicsartAI		
21	Pixlr		
22	Shutterstock AI		
80	Other (please specify)	TEXT RESPONSE	
85	Don't know	EXCLUSIVE	

Q35.

Base: those who have created/generated or modified content using AI in the last 12 months (Q11/1 or Q12/1)

You said you have used AI to <IF Q11/1 AND Q12/2,85: create/generate/IF Q11/2,85 AND Q12/1,: modify/IF Q11/1 AND Q12/1: create/generate and modify> images or video in the last 12 months.

Did you use <BRAND>'s AI-creation/generation or AI-modification tools?

Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No		
85	Don't know		

Q36.

Base: those who DID use parties' AI tools to create/generate or modify images or videos (Q35/1)

How far do you agree or disagree with the following statements about <BRAND>'s AI images or videos.

Please select one answer per statement.

SINGLE GRID, RANDOMISE ROWS

Code	Rows	Scripting notes	Routing
1	The quality of their AI images/videos is high		
2	Their AI tools are easy to use		
3	Their AI images/videos often need modifications in another / a different supplier's tool/platform		
4	They enable a wide range of images/videos to be generated		
5	Legal and ethical considerations make <BRAND>'s AI images/videos preferable to other AI image generators or modification tools		

Code	Answer list (columns)	Scripting notes	Routing
1	Strongly agree		
2	Tend to agree		
3	Neither agree nor disagree		
4	Tend to disagree		
5	Strongly disagree		
85	Don't know		

Q37.**Base: all respondents**

Some AI models are trained on images that were obtained with the consent of the artist/intellectual property holder, and others are trained on images where consent has not been obtained.

When considering whether to use AI to create/generate images or videos, how relevant to your decision is it that the AI model has been trained on images obtained **with consent**?

Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Very relevant		
2	Fairly relevant		
3	Not very relevant		
4	Not at all relevant		
85	Don't know		
87	Not applicable - I would not consider using AI		

Q38.**Base: all respondents**

Looking ahead over the next 2 years, how much, if at all, do you expect your usage of AI to create/generate images or videos to change?

I expect my use of AI to create/generate images or video to...

Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Increase considerably		
2	Increase slightly		
3	Stay about the same		
4	Decrease slightly		
5	Decrease considerably		
85	Don't know		
87	Not applicable - I don't plan to use AI at all		

Q39.**Base: those who expect usage to increase considerably/slightly (Q38/1-2)**

Why do you expect your usage of AI to create/generate images or videos to increase?

Please select all that apply.

MULTI RESPONSE, RANDOMISE

Code	Answer list	Scripting notes	Routing
1	Legal and licensing concerns are likely to reduce		

2	Technology will become easier to use		
3	The quality of AI is likely to improve		
4	The AI modification features I use are likely to improve		
5	The price of AI is likely to decrease		
6	To reduce time and costs in my creative workflow		
7	Greater public/customer/stakeholder acceptance		
80	Other (please specify)	TEXT RESPONSE. FIXED	
85	Don't know	EXCLUSIVE, FIXED	

Q40.

Base: those who expect usage to stay about the same or decrease considerably/slightly (Q38/3-5)

Why do you expect your usage to stay about the same or decrease?

Please select all that apply.

MULTI RESPONSE, RANDOMISED

Code	Answer list	Scripting notes	Routing
1	I have legal and licensing concerns		
2	I am already using AI to the extent I can		
3	I find it difficult or time-consuming to use the technology		
4	AI images are not of sufficiently high quality for me to use		
5	I use other creative tools/platforms to modify existing AI images		
6	The price of using AI is too high		
7	AI images lack authenticity		
80	Other (please specify)	TEXT RESPONSE, FIXED	
85	Don't know	EXCLUSIVE, FIXED	

Q41.

Base: Those who don't use AI (base: Q11/2,85 AND Q12/2,85)

What, if any, are the biggest barriers to adopting AI image or video creation/generation <IF S05/1,3: in your business/organisation>?

Please select all that apply.

MULTI RESPONSE, RANDOMISED

Code	Answer list	Scripting notes	Routing
1	Company policy on AI		
2	Legal and licensing concerns		
3	Don't feel comfortable using AI that has been trained using data without consent		
4	Difficult/time-consuming/don't know how to use the technology		

5	Quality of AI-generated visuals		
6	Difficulty crafting effective prompts		
7	Concern over public/customer/stakeholder perception of using AI content		
8	Lack of authenticity		
9	Concern over remuneration of content creators		
10	Price		
80	Other (specify)	TEXT RESPONSE, FIXED	
85	Don't know	EXCLUSIVE, FIXED	
87	Not applicable - there are no barriers	EXCLUSIVE, FIXED	

Q41a.

Base: Those who do use AI (base: Q11/1 OR Q12/1)

What, if any, are the biggest barriers to wider or more frequent adoption of AI image or video creation/generation <IF S05/1,3: in your business/organisation>?

Please select all that apply.

MULTI RESPONSE, RANDOMISED

Code	Answer list	Scripting notes	Routing
1	Company policy on AI		
2	Legal and licensing concerns		
3	Don't feel comfortable using AI that has been trained using data without consent		
4	Difficult/time-consuming/don't know how to use the technology		
5	Quality of AI-generated visuals		
6	Difficulty crafting effective prompts		
7	Concern over public/customer/stakeholder perception of using AI content		
8	Lack of authenticity		
9	Concern over remuneration of content creators		
10	Price		
80	Other (specify)	TEXT RESPONSE, FIXED	
85	Don't know	EXCLUSIVE, FIXED	
87	Not applicable - there are no barriers	EXCLUSIVE, FIXED	

Demographics

D01.

Base: those who have downloaded/purchased for commercial use only or for both commercial and personal/non-commercial use (S05/1, 3)

Approximately, how many employees currently work at your business/organisation across all sites in the UK and (if applicable) elsewhere?

Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Just me		
2	2 - 9		
3	10 - 49		
4	50 - 199		
5	200 - 499		
6	500 - 999		
7	1000 - 4999		
8	5,000 +		
85	Don't know		

D02.

Base: those who have downloaded/purchased for commercial use only or for both commercial and personal/non-commercial use (S05/1, 3)

In relation to your use of image or video content, which of the following best describes your business/organisation?

Please select one answer.

SINGLE RESPONSE, ORDER ALPHABETICALLY

Code	Answer list	Scripting notes	Routing
1	Agency		
2	Corporate		
3	Media		
4	Marketing		
5	TV & Film production		
6	Small business/freelancer		
7	Charity/CIC/Not for profit		
80	Other (please specify)	TEXT RESPONSE	
87	Not applicable - I am a personal/non-commercial user		
85	Don't know		

INCENTIVE QUESTIONS

C01.

Base: all respondents

As a thank you for taking part, we'd like to offer you £25. This can be in the form of a:

- GiftPay voucher (a **digital gift card** that can be used at a wide range of retailers)
- Charity donation on your behalf (choice of charities).

How would you like to receive your £25 thank you?

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Gift Pay voucher		
2	Charity donation		
87	I do not want to / cannot accept the £25 incentive		

C02.

Base: respondents with an email address who want a GiftPay voucher (C01/1)

Could you please confirm these details are correct so that we can send your £25 GiftPay voucher.

Please note that GiftPay vouchers are manually issued and therefore take 3-5 working days to be processed. We will endeavour to send these as soon as possible. Please only contact us if you have not received your voucher after 5 working days and after checking your spam/junk folder.

[PLEASE POPULATE EMAIL NAME AND ADDRESS FROM SAMPLE]

Name: OPEN

Email address: OPEN

Code	Answer list	Scripting notes	Routing
1	Yes		THANK & CLOSE
2	No		C03

C03.

Base: those who say details are incorrect for GiftPay voucher (C02/2) or who do not have an email address in the sample

Please enter your details below.

Name: OPEN

Email address: OPEN

C04.

Base: those who want the charity donation (C01/2)

Which of the following charities would you like the £25 to be donated to?

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Cities for Trees (improve lives by planting and caring for trees in cities)	THANK AND CLOSE	
2	Red Cross (humanitarian charity providing life-saving support during emergencies, disasters, and humanitarian crises)	THANK AND CLOSE	
3	Create (charity that runs creative arts projects with children and adults facing challenges in their lives)	THANK AND CLOSE	
87	I do not want to donate £25 to any of these charities.		

C05.

Base: those who don't want to donate to any of the three charities (C04/87)

Would you like to accept the £25 Gift Pay voucher instead?

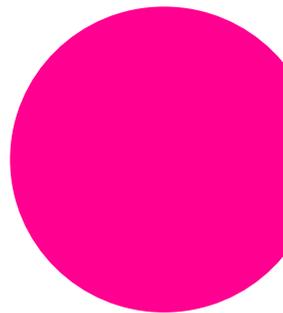
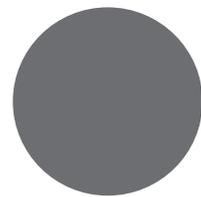
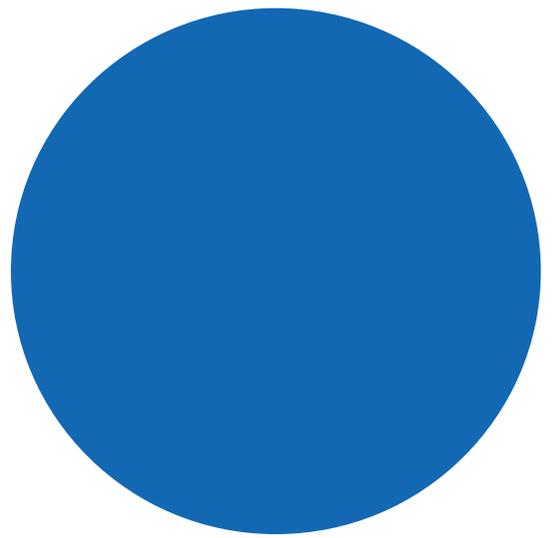
SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Yes		GO BACK TO C02
2	No - I will forgo the £25 incentive		THANK AND CLOSE

Thank you: that is the end of the survey.



Questionnaire: CATI





Questionnaire: CMA Stock Images Merger



Client name:	CMA
Project name:	Stock Images Merger
Job number:	10717
Methodology:	CATI
Version	3

Notes on this document

- Instructions in **CAPS** are for computer programming
- Instructions in *italics* are for telephone interviewers
- **Bold** or underlined words are for emphasis within a question
- Different question types have different numbers:
 - Screener questions are labelled S01, S02, S03 etc.
 - Main survey questions are labelled Q01, Q02, Q03 etc.
 - Further demographic / classification questions are labelled C01, C02, C03 etc.
 - Number codes are included on each question for data processing purposes

Introduction

IF MOBILE NUMBER:

Hello, I think I've called you on a mobile number. May I just check that you're not driving a vehicle or operating machinery and that it's OK for me to speak to you now?

IF THE RESPONDENT IS DRIVING OR OPERATING MACHINERY, EVEN IF THEY'RE USING A HANDS-FREE OR BLUETOOTH DEVICE, POLITELY AND QUICKLY END THE CALL.

In that case, I'll call back later. Good-bye.

IF LANDLINE NUMBER OR MOBILE NUMBER BUT OK TO CONTINUE:

Hello <PULL IN NAME FROM SAMPLE>, my name is [x] and I'm calling you from DJS Research, an independent market research company. We emailed you recently about the survey we're conducting on behalf of the Competition and Markets Authority (CMA) with users of image or video content.

[ADD IF RESPONDENT QUERIES: The CMA is an independent government body which helps people, businesses, and the UK economy by promoting competitive markets.]

We believe that you purchased/downloaded image or video content from <BRAND> in the last 12 months and – as such – we'd very much like you to take part in the survey.

Everyone who is eligible to answer the survey in full and completes it by **Friday 23rd 2026** will receive **£25** as a thank you for their time (either as a GiftPay voucher payable to them or as a donation to charity).

If convenient, I can interview you now by telephone, or we can make arrangements to call you back – the survey takes approximately 15 minutes to complete. Alternatively, if you prefer to do the survey online, I'll resend you our email which includes the link to the questionnaire.

IF RESPONDENT OPTS FOR ONLINE, CHECK/VERIFY EMAIL ADDRESS AND SEND THE ONLINE SURVEY COVER EMAIL.

IF RESPONDENT OPTS FOR TELEPHONE AT A LATER DATE/TIME, MAKE APPOINTMENT (DATE AND APPROXIMATE TIMESLOT), THEN CLOSE

IF RESPONDENT OPTS FOR TELEPHONE NOW, CONTINUE.

CATI INTERVIEWER TO CODE OPTION FOR ONLINE IF NEEDED

INFOGDPR

Before we go any further, there's a GDPR statement that I need to read to you.

Under section 109 of the Enterprise Act 2002, the CMA has statutory (legal) powers to obtain customer lists from parties to a CMA inquiry, and to share these lists with a research supplier for use as a sample. On this occasion, the CMA has used its powers to require <BRAND> to supply the names, contact details and transaction details for customers who have downloaded image and video content from them in the last 12 months. You were randomly sampled as a customer of <BRAND>. The CMA's legal basis for processing your personal data is because it is necessary for the performance of a task carried out in the public interest or in the exercise of official authority vested in the data controller. Because the CMA has statutory (legal) powers to process your personal data, the CMA does not need your consent to process your personal data under data protection law.

Your personal data and survey answers will be used and stored (processed) fully in line with the UK GDPR. You will not be individually identifiable in the findings we share with the CMA. And we will not share your personal data with any third party, except in the very unlikely event that we are required to do so by law. Your personal data will be securely deleted on conclusion of the CMA's inquiry.

We provide full details about how the CMA, as a controller, processes personal data in the email that I'm about to send you.

[CHECK/VERIFY EMAIL ADDRESS AND SEND THE GDPR INFO EMAIL.](#)

Finally, just to let you know that this call will be recorded for training and monitoring purposes, but the recording will not be used for any other purpose.

IF REQUESTED:

The Market Research Society Freephone verification number is 0800 975 9596 or you can check online at <https://www.mrs.org.uk/standards/online-register>

QUOTAS –TOTAL

AUDIENCE	QUOTA LIMIT	TAKEN FROM WHERE?
Getty Images	120	FROM SAMPLE
iStock	120	FROM SAMPLE
Shutterstock Business Solutions	120	FROM SAMPLE
Shutterstock Marketplace	120	FROM SAMPLE

Screener

DP NOTE: Where <BRAND> appears show brand from sample. E g. Getty Images / iStock / Shutterstock

S01a.

Base: all respondents

We are unable to interview people under the age of 18. Can you confirm you are over 18?

DO NOT READ OUT. Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No	SCREEN OUT	
86	Prefer not to say	SCREEN OUT	

INFO.1.

Base: all respondents

The following questions are about images or videos related to **creative or commercial content**. This excludes editorial content (i.e. images of news, entertainment or sports events used to illustrate news stories or other coverage).

S02.

Base: all respondents

According to the information we have, you purchased/downloaded an image or video from <BRAND> on <SAMPLE DATE>.

Do you remember making that purchase/download?

PROMPT IF NO. Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No – but I have made at least one purchase / download from <BRAND> in the last 12 months (please tell us when – a rough idea is fine if you can't remember exactly)	TEXT RESPONSE MM/YYYY (DP NOTE: ENSURE YEAR CAN ONLY BE 2024/25)	
3	No – and I have not made any purchase / download from <BRAND> in the last 12 months	SCREEN OUT	
85	Don't know	SCREEN OUT	

S04a.**Base: all respondents**

Thinking again about this occasion, was the image or video content you purchased/downloaded from <BRAND> for use within the UK (as opposed to use within other countries)?

Ask for yes/no first then probe to code. If no – check they have made a purchase in last 12 months for use in UK (code 3) to qualify. Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Yes – for use in the UK only	INFO NewA	
2	Yes – for use in the UK and outside the UK	INFO NewA	
3	No – for use outside the UK only (but I have made at least one purchase / download from <BRAND> for use in the UK in the last 12 months)	INFO NewA	
4	No – for use outside the UK only (and I have not made any purchase / download from <BRAND> for use in the UK in the last 12 months)	SCREEN OUT	
85	Don't know	SCREEN OUT	

INFO NewA.**Base: all respondents**

As you answer the following questions, please continue to think about your most recent purchase/download of image or video content from <BRAND> which was for use in the UK.

S06.**Base: all respondents**

Who would you say took the lead on the decision to use <BRAND> on this occasion?

PROBE TO CODE. Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Me – I took the lead		
2	Someone else/others took the lead	INFO 2	
3	It was a joint decision involving me and someone else/others		
85	Don't know/can't remember	SCREEN OUT	

S07.**Base: those who were involved in the decision (S06/1,3)**

Which of the following statements best describes how you reached the decision to use <BRAND> for image or video content on this occasion?

READ OUT. Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	I / we had a completely free choice of which supplier to use		
2	I / we chose which supplier to use from the selection of suppliers that my / our business/organisation makes available		
3	I / we used <BRAND> because it's the only supplier that my / our business/organisation makes available		
85	Don't know/can't remember <i>Do not read out</i>	SCREEN OUT	

S08.**Base: those who used the only supplier that is made available (S07/3)**

Did you have any influence over/involvement in the decision by your business/organisation to use <BRAND> as its only image or video content supplier?

DO NOT READ OUT. Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No	INFO 2CATI	
85	Don't know/can't remember	INFO 2CATI	

S05.**Base: all respondents**

In the last 12 months, has the image or video content you've purchased/downloaded from <BRAND> been for...?

READ OUT. Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Commercial use only	INFO NewB	
2	Personal/non-commercial use only	INFO NewB	
3	A mix of both commercial and personal/non-commercial use	INFOx	
85	Don't know <i>Do not read out</i>	SCREEN OUT - INFO2B	

INFO2CATI.

Base: those who were not involved in choice of supplier (S06/2) or who had no influence over choice of supplier (S08/2 or S08/85)

Thank you for answering our questions so far. Our main questionnaire is for customers with an involvement in the decision about which image or video content supplier to use so there's nothing further that we need to ask you today.

It is really important to the CMA that we talk to someone from your business/organisation who **was** involved in the decision to use <BRAND>. Are you able to refer me to someone appropriate?

Code	Answer list	Scripting notes	Routing
1	Yes (Capture name and tel)	NAME TEL EMAIL (OPTIONAL)	
2	No	THANK AND CLOSE	

INFO2B.

Base: S05/85

Unfortunately, you don't qualify for our survey. Thank you for taking the time to answer our questions so far.

INFO NewB.

Base: those who have purchased/downloaded for commercial use only (S05/1) or personal/non-commercial use only (S05/2)

Please continue to think about the most recent occasion when you purchased/downloaded image or video content from <BRAND> for use in the UK.

INFOx.

Base: those who have purchased/downloaded for both commercial and personal/non-commercial use (S05/3)

As you answer the following questions, please think about the most recent occasion when you purchased/downloaded image or video content from <BRAND> for **commercial use in the UK**.

S03.

Base: all respondents

On this occasion, did you make the purchase/download...?

READ OUT. Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	For your own use only		
2	For someone else's use only		
3	For use by you and someone else		
85	Don't know/can't remember <i>Do not read out</i>	SCREEN OUT - INFO2C	

INFO2C.

Base: S03/85

Unfortunately, you don't qualify for our survey. Thank you for taking the time to answer our questions so far.

Main questionnaire: Usage and subscriptions

Q01.

Base: all respondents

How <IF S05/2: do you/IF S05/1,3: does your business/organisation> pay for image or video content from <BRAND>?

READ OUT. Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Using a subscription (i.e. annual or monthly fee)		
2	Using a different method (a la carte, credit pack or image pack)		
80	In another way (<i>please specify</i>)	TEXT RESPONSE	
85	Don't know <i>Do not read out</i>		

Q02.

Base: all respondents

Thinking about the most recent occasion when you purchased/downloaded image or video content from <BRAND> for <IF S05/3: commercial> use in the UK, was that image or video content used with any design, editing or marketing tool or platform to produce your/someone else's end work or project?

PROBE IF YES WHICH MARKETING TOOL/PLATFORM. Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Yes, Adobe		
2	Yes, Affinity		
3	Yes, Canva		
4	Yes, Picsart		
80	Yes, another tool/platform (please specify)	TEXT RESPONSE	
87	No		
85	Don't know <i>Do not read out</i>		

Q03.

Base: all respondents

Where <IF S05/2: have you/IF S05/1,3: has your business/organisation> sourced image or video content from in the last 12 months?

READ OUT. Please select all that apply.

MULTI RESPONSE, RANDOMISED

Code	Answer list	Scripting notes	Routing
1	AI image generators		
2	Free image or video supplier(s)		
3	Paid image or video supplier(s)		
4	Design or marketing tool/platform (e.g. Adobe, Canva)		
5	Marketing and advertising platforms (e.g. Meta, Hubspot)		
6	We commission bespoke images or videos		
7	We produce images or videos in-house		
8	Our own collection of images or videos		
80	Other (please specify)	TEXT RESPONSE, FIXED	
85	Don't know <i>Do not read out</i>	EXCLUSIVE, FIXED	

Q04a.

Base: all respondents

In the last 12 months, which supplier or suppliers (if any) <IF S05/2: have you/IF S05/1,3: has your business/organisation> obtained **paid** images or videos from **using a subscription (i.e. annual or monthly fee)**? I mean which supplier or suppliers OTHER THAN <BRAND>, if any.

DO NOT READ OUT. ASK FOR ANY MORE SUPPLIERS. Please select all that apply.

MULTI RESPONSE, ORDERED

Code	Rows	Scripting notes	Routing
1	123RF		
2	Adobe		
3	Artlist		
4	Bigstock		
5	Canva		
6	DepositPhotos		
7	Dissolve		
8	Dreamstime		
9	Envato		
10	Freepik		
11	Getty Images	HIDE FOR GETTY IMAGES SAMPLE AND IF Q01/1 or Q01/85	
12	IMAGO		

13	iStock	HIDE FOR ISTOCK SAMPLE AND IF Q01/1 or Q01/85	
14	PA Media/Alamy		
15	Pixta		
16	Pond5		
17	Shutterstock	HIDE FOR SHUTTERSTOCK SAMPLE AND IF Q01/1 or Q01/85	
18	Stocksy		
19	StoryBlocks		
20	Unsplash		
21	Vecteezy		
80	Other (please specify)	TEXT RESPONSE	
85	Don't know	EXCLUSIVE	
87	None of the above	EXCLUSIVE	

Q04b.

Base: all respondents

In the last 12 months, which supplier or suppliers (if any) <IF S05/2: have you/IF S05/1,3: has your business/organisation> obtained **paid** images or videos from **using a different method to subscription (e.g. a la carte, credit pack or image pack)**? I mean which supplier or suppliers OTHER THAN <BRAND>, if any.

DO NOT READ OUT. ASK FOR ANY MORE SUPPLIERS. Please select all that apply.

MULTI RESPONSE, ORDERED

Code	Rows	Scripting notes	Routing
1	123RF		
2	Adobe		
3	Artlist		
4	Bigstock		
5	Canva		
6	DepositPhotos		
7	Dissolve		
8	Dreamstime		
9	Envato		
10	Freepik		
11	Getty Images	HIDE FOR GETTY SAMPLE IF Q01 = 2, 85	
12	IMAGO		
13	iStock	HIDE FOR ISTOCK SAMPLE IF Q01 = 2, 85	
14	PA Media/Alamy		
15	Pixta		
16	Pond5		
17	Shutterstock	HIDE FOR SHUTTERSTOCK SAMPLE IF Q01 = 2, 85	
18	Stocksy		
19	StoryBlocks		
20	Unsplash		

21	Vecteezy		
80	Other (please specify)	TEXT RESPONSE	
85	Don't know	EXCLUSIVE	
87	None of the above	EXCLUSIVE	

Q05.

Base: those who select one supplier other than the one they use from the sample (across Q04a or Q04b) excl. Q04a/85,87 or Q04b/85,87

Please explain why <IF S05/2: you use/IF S05/1,3: your business/organisation uses> multiple suppliers of image or video content?

DO NOT READ OUT. ASK FOR ANY MORE REASONS. Please select all that apply.

MULTI RESPONSE

Code	Answer list	Scripting notes	Routing
1	To increase the range of image or video content available		
2	To take advantage of different categories / content types / strengths of different suppliers		
3	Different individual preferences		
4	To give me a range of tools beyond images or videos		
5	A supplier I use/my organisation uses has bundled in image/video content with something I/my business/organisation already purchases		
6	Overall cost advantages		
7	Downloading/technical reasons		
8	Access to premium content		
80	Other (please specify)	TEXT RESPONSE, FIXED	
85	Don't know	EXCLUSIVE, FIXED	

Q06.

Base: all respondents

In the last 12 months, for which of the following (if any) <IF S05/2: have you/IF S05/1,3: has your business/organisation> used **paid** image or video content?

READ OUT. Please select all that apply.

MULTI RESPONSE, RANDOMISE

Code	Answer list	Scripting notes	Routing
1	Planning		
2	Internal presentations		
3	Social media content		
4	Advertising or marketing – web	KEEP CODES 4-7 TOGETHER	
5	Advertising or marketing – print		
6	Advertising or marketing – TV and broadcast		

7	Advertising or marketing – social media		
8	Print collateral and material (e.g. flyers, magazines)		
9	In an editorial manner, using creative content to cover a topic or story		
10	TV and broadcast		
11	Game development/Concept art		
80	In another way (<i>please specify</i>)	TEXT RESPONSE, FIXED	
85	Don't know <i>Do not read out</i>	EXCLUSIVE, FIXED	

Q07.

Base: all respondents

How many times, if at all, <IF S05/2: have you/IF S05/1,3: has your business/organisation> used **free** image or video content in the last 12 months? A rough idea is fine if you don't know the exact number.

DO NOT READ OUT, PROBE TO CODE. Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	0 – not used any free image and/or video content in the last 12 months		
2	1-4 times		
3	5-10 times		
4	11-50 times		
5	More than 50 times		
85	Don't know		

Q08.

Base: those who use free content (Q07/2-5)

In the last 12 months, what <IF S05/2: have you/IF S05/1,3: has your business/organisation> used **free** image or video content for?

READ OUT. Please select all that apply.

MULTI RESPONSE, RANDOMISE

Code	Answer list	Scripting notes	Routing
1	Planning		
2	Internal presentations		
3	Social media content		
4	Advertising or marketing – web	KEEP CODES 4-7 TOGETHER	
5	Advertising or marketing – print		
6	Advertising or marketing – TV and broadcast		
7	Advertising or marketing – social media		
8	Print collateral and material (e.g. flyers, magazines)		

9	In an editorial manner, to cover a topic or story		
10	TV and broadcast		
11	Game development/Concept art		
80	In another way (<i>please specify</i>)	TEXT RESPONSE, FIXED	
85	Don't know <i>Do not read out</i>	EXCLUSIVE, FIXED	

Q09 REMOVED DURING DRAFTING

Q10 REMOVED DURING DRAFTING

Q11.

Base: all respondents

In the last 12 months, have you personally used AI to **create/generate** images or videos (as opposed to modifying them)?

DO NOT READ OUT. Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No		
85	Don't know		

Q12.

Base: all respondents

In the last 12 months, have you personally used AI to **modify** existing images or videos?

DO NOT READ OUT. Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No		
85	Don't know		

Main questionnaire: Choice Factors

INFO NewC.

Base: those who have purchased/downloaded for commercial use only (S05/1) or personal/non-commercial use only (S05/2)

Please continue to think about the most recent occasion when you purchased/downloaded image or video content from **<BRAND>** for use in the UK.

INFO NewD.

Base: those who have purchased/downloaded for both commercial and personal/non-commercial use (S05/3)

Please continue to think about the most recent occasion when you purchased/downloaded image or video content from <BRAND> for commercial use in the UK.

Q13.

Base: those who had a free choice to use suppliers (S07/1-2)

You said you were personally involved in the decision to choose <BRAND> from <IF S7/1: a completely free choice of suppliers/IF S7/2: the selection of suppliers your business/organisation makes available>.

Why did you choose to use <BRAND> on this occasion, rather than a different supplier/source?

DO NOT READ OUT. PROBE FOR ANY OTHER REASON. Please select all that apply.

MULTI RESPONSE

Code	Answer list	Scripting notes	Routing
1	The price		
2	They had a particular image/video content library that suited my / our need		
3	Purchasing arrangement (e.g. product package flexibility)		
4	Their content was appropriately licensed (owner's permission to use)		
5	<BRAND> offered legal/financial protection (indemnity)		
6	The range of images/video available		
7	Ease of downloading		
8	Search functionality		
9	Resolution of images/videos		
10	Quality of image/video content		
11	Uniqueness of image/video content (images/videos not available elsewhere)		
12	The availability of premium content		
13	Availability of generative AI tools or content on the platform		
14	Availability of editorial visual content/content alongside creative visual content		
80	Other (please specify)	TEXT RESPONSE, FIXED	
85	Don't know	EXCLUSIVE, FIXED	

Q13a.**Base: those who used only supplier available (S07/3)**

You said you had influence over/involvement in the decision by your business/organisation to use <BRAND> as its only image or video content supplier.

Thinking back to when you made the decision to use <BRAND> why did you choose <BRAND> rather than a different supplier/source?

DO NOT READ OUT. PROBE FOR ANY OTHER REASON. Please select all that apply.

MULTI RESPONSE

Code	Answer list	Scripting notes	Routing
1	The price		
2	They had a particular image/video content library that suited my / our need		
3	Purchasing arrangement (e.g. product package flexibility)		
4	Their content was appropriately licensed (owner's permission to use)		
5	<BRAND> offered legal/financial protection (indemnity)		
6	The range of images/video available		
7	Ease of downloading		
8	Search functionality		
9	Resolution of images/videos		
10	Quality of image/video content		
11	Uniqueness of image/video content (images/videos not available elsewhere)		
12	The availability of premium content		
13	Availability of generative AI tools or content on the platform		
14	Availability of editorial visual content/content alongside creative visual content		
80	Other (please specify)	TEXT RESPONSE, FIXED	
85	Don't know	EXCLUSIVE, FIXED	

Q14.**Base: those who choose more than one reason at Q13**

And which was the MAIN REASON for choosing <BRAND> on this occasion?

DO NOT READ OUT. Please select one answer.

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	The price	ONLY SHOW IF SELECTED AT Q13	
2	They had a particular image/video content library that suited my / our need		
3	Purchasing arrangement (e.g. product package flexibility)		

4	Their content was appropriately licensed (owner's permission to use)		
5	<BRAND> offered legal/financial protection (indemnity)		
6	The range of images/video available		
7	Ease of downloading		
8	Search functionality		
9	Resolution of images/videos		
10	Quality of image/video content		
11	Uniqueness of image/video content (images/videos not available elsewhere)		
12	The availability of premium content		
13	Availability of generative AI tools or content on the platform		
14	Availability of editorial visual content/content alongside creative visual content		
80	<PULL THROUGH FROM Q13/80>		
85	Don't know	FIXED	

Q14a.

Base: those who choose more than one reason at Q13a

And which was the MAIN REASON for choosing <BRAND>?

DO NOT READ OUT. Please select one answer.

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	The price	ONLY SHOW IF SELECTED AT Q13a	
2	They had a particular image/video content library that suited my / our need		
3	Purchasing arrangement (e.g. product package flexibility)		
4	Their content was appropriately licensed (owner's permission to use)		
5	<BRAND> offered legal/financial protection (indemnity)		
6	The range of images/video available		
7	Ease of downloading		
8	Search functionality		
9	Resolution of images/videos		
10	Quality of image/video content		
11	Uniqueness of image/video content (images/videos not available elsewhere)		
12	The availability of premium content		
13	Availability of generative AI tools or content on the platform		
14	Availability of editorial visual content/content alongside creative visual content		
80	<PULL THROUGH FROM Q13a/80>		
85	Don't know	FIXED	

Main questionnaire: Diversion

INFO NewE.

Base: those who have purchased/downloaded for commercial use only (S05/1) or personal/non-commercial use only (S05/2) AND used the only supplier made available (S07/3)

Please continue to think about the most recent occasion when you purchased/downloaded image or video content from <BRAND> for use in the UK.

INFO NewF.

Base: those who have purchased/downloaded for both commercial and personal/non-commercial use (S05/3) AND used the only supplier made available (S07/3)

Please continue to think about the most recent occasion when you purchased/downloaded image or video content from <BRAND> for **commercial use** in the UK.

Q15.

Base: all respondents

Thinking back to when you made your decision to purchase/download image or video content from <BRAND> on this occasion ...

If that supplier had not been available, and taking account of all the options that might be available to you, what are you most likely to have done instead? Please wait until I've read out the full list of options before you give me your answer.

READ OUT. Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	I would have purchased the content from a different paid image/video supplier		
2	I would have downloaded content from a free image/video supplier		
3	I would have generated content using AI		
4	I would have produced the image/video in-house		
5	I would not have used anything		
6	I would have done something else (please specify)	TEXT RESPONSE	
85	Don't know <i>Do not read out</i>		

Q16.**Base: those who would have downloaded free content from elsewhere (Q15/2)**

Which supplier would you have sourced free image or video content from instead?

*DO NOT READ OUT. Please select one answer.***SINGLE RESPONSE, ORDERED**

Code	Answer list	Scripting notes	Routing
1	Burst		
2	Canva		
3	Coverr		
4	Freefoodphotos		
5	Freerangestock		
6	Freepik		
7	Goodstockphotos		
8	Gratisography		
9	Life of Pix		
10	Morguefile		
11	Negative Space		
12	Pexels		
13	Picography		
14	Picwizard		
15	Pixabay		
16	Pixy		
17	RgbStock		
18	StockSnap		
19	Unsplash		
20	Vecteezy		
80	Other (please specify)	TEXT RESPONSE	
85	Don't know		

Q17.**Base: those who would have purchased from a different brand (Q15/1)**

Which supplier would you have bought image or video content from instead?

*DO NOT READ OUT. Please select one answer.***SINGLE RESPONSE, ORDER ALPHABETICALLY**

Code	Answer list	Scripting notes	Routing
1	123RF		
2	Adobe		
3	Artlist		
4	DepositPhotos		
5	PA Media/Alamy		
6	Bigstock		
7	Canva		
8	Dreamstime		
9	Envato		
10	Freepik		
11	Getty Images	HIDE IF GETTY IMAGES SAMPLE (BUT RETAIN iStock)	

12	iStock	HIDE IF iStock SAMPLE (BUT RETAIN GETTY IMAGES)	
13	Pixta		
14	Pond5		
15	Shutterstock	HIDE FOR SHUTTERSTOCK SAMPLE (BUSINESS SOLUTIONS AND MARKETPLACE)	
16	Stocksy		
17	StoryBlocks		
18	Dissolve		
19	IMAGO		
20	Unsplash		
21	Vecteezy		
80	Other (please specify)	TEXT RESPONSE	
85	Don't know		

Q18a.

Base: If GETTY IMAGES sample and select iStock (Q17/12) or Unsplash (Q17/20)

Getty owns Getty Images, iStock and Unsplash. If none of the brands owned by Getty were available, what are you most likely to have done instead? Please wait until I've read out the full list of options before you give me your answer.

Q18b.

Base: If iStock sample and select GETTY IMAGES (Q17/11) or Unsplash (Q17/20)

Getty owns iStock, Getty Images and Unsplash. If none of the brands owned by Getty were available, what are you most likely to have done instead? Please wait until I've read out the full list of options before you give me your answer.

Q18c.

Base: If SHUTTERSTOCK sample and select BIGSTOCK, ENVATO OR POND5 (Q17/6,9,14)

Shutterstock owns Bigstock, Envato and Pond5. If none of the brands owned by Shutterstock were available, what are you most likely to have done instead? Please wait until I've read out the full list of options before you give me your answer.

READ OUT. Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	I would have purchased the content from a different paid image/video supplier		
2	I would have downloaded content from a free image/video supplier		
3	I would have generated content using AI		
4	I would have produced the image/video in-house		
5	I would not have used anything		

6	I would have done something else (please specify)	TEXT RESPONSE	
85	Don't know <i>Do not read out</i>		

Q19.

Base: IF Q18a or Q18b or Q18c/2

Which supplier would you have sourced **free** image or video content from instead?

DO NOT READ OUT. Please select one answer.

WHERE GETTY IMAGES OR ISTOCK SAMPLE: IF UNFLASH IS MENTIONED, DO NOT WRITE IN OTHER, ASK FOR AN ALTERNATIVE SUPPLIER

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Burst		
2	Canva		
3	Coverr		
4	Freefoodphotos		
5	Freerangestock		
6	Freepik		
7	Goodstockphotos		
8	Gratisography		
9	Life of Pix		
10	Morguefile		
11	Negative Space		
12	Pexels		
13	Picography		
14	Picwizard		
15	Pixabay		
16	Pixy		
17	RgbStock		
18	StockSnap		
19	Unsplash	HIDE FOR GETTY IMAGES AND ISTOCK SAMPLE	
20	Vecteezy		
80	Other (please specify)	TEXT RESPONSE	
85	Don't know		

Q19b.**Base: IF Q18a or Q18b or Q18c/1**

Which supplier would you have bought image or video content from instead?

*DO NOT READ OUT. Please select one answer.**ANSWERS NOT AVAILABLE (DO NOT WRITE THESE IN OTHER - ASK FOR AN ALTERNATIVE SUPPLIER IF ANY OF THESE ARE MENTIONED)***SHUTTERSTOCK SAMPLE** – Bigstock, Envato, Pond5 and Shutterstock**iStock AND GETTY IMAGES SAMPLE** – Getty Images, iStock and Unsplash**SINGLE RESPONSE, ORDER ALPHABETICALLY**

Code	Answer list	Scripting notes	Routing
1	123RF		
2	Adobe		
3	Artlist		
4	DepositPhotos		
5	PA Media/Alamy		
6	Bigstock	HIDE FOR SHUTTERSTOCK SAMPLE	
7	Canva		
8	Dreamstime		
9	Envato	HIDE FOR SHUTTERSTOCK SAMPLE	
10	Freepik		
11	Getty Images	HIDE FOR GETTY IMAGES AND iStock SAMPLE	
12	iStock	HIDE FOR iStock AND GETTY IMAGES SAMPLE	
13	Pixta		
14	Pond5	HIDE FOR SHUTTERSTOCK SAMPLE	
15	Shutterstock	HIDE FOR SHUTTERSTOCK SAMPLE	
16	Stocksy		
17	StoryBlocks		
18	Dissolve		
19	IMAGO		
20	Unsplash	HIDE FOR GETTY IMAGES AND iStock SAMPLE	
21	Vecteezy		
80	Other (please specify)	TEXT RESPONSE	
85	Don't know		

Q20.**Base: those who would have used AI generation if brand not available (Q15/3 or Q18a or Q18b or Q18c/3)**

Which AI generation tool would you have used instead?

*DO NOT READ OUT. Please select one answer.***SINGLE RESPONSE, ORDER ALPHABETICALLY**

Code	Answer list	Scripting notes	Routing
1	123RF AI Image Generator		

2	Adobe Suite (e.g., Firefly, Creative Cloud)		
3	Amazon Titan		
4	Canva AI		
5	ChatGPT		
6	ArtList		
7	Davinci		
8	Dreamstudio		
9	Generative AI by Getty Images		
10	Generative AI by iStock		
11	Google Gemini / AI Studio		
12	Meta AI		
13	Midjourney AI		
14	Microsoft Image Creator from Designer		
15	PicsartAI		
16	Shutterstock AI		
80	Other (please specify)	TEXT RESPONSE	
85	Don't know		

Main questionnaire: AI

Q21.

Base: those who have created/generated AI content in the last 12 months (Q11/1)

Earlier, you said that you had used AI to **create/generate** images or videos in the last 12 months.

For what purposes have you used the images or videos that you created with this/these AI tool(s)?

READ OUT. Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	For commercial use only		
2	For personal/non-commercial use only		
3	A mix of both commercial and personal/non-commercial use		
85	Don't know <i>Do not read out</i>		

INFO. X

Base: those who have created AI content in the last 12 months for both commercial and personal/non-commercial use (Q21/3)

The following questions are about your use of AI tools to **create/generate** images or videos for **commercial** use.

Q22.

Base: those who have created/generated AI content in the last 12 months (Q11/1)

How often have you used AI to **create/generate** images or videos in the last 12 months? A rough idea is fine if you don't know exactly how often.

DO NOT READ OUT. Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Every day or most days		
2	Once or twice a week		
3	Once or twice a fortnight		
4	Once or twice a month		
5	Once or twice every three months		
6	Once or twice every six months		
7	Once or twice in the last 12 months		
85	Don't know		

Q22a REMOVED DURING DRAFTING

Q23.

Base: those who have created/generated AI content in the last 12 months (Q11/1)

In the last 12 months, what have you used AI-created/generated content for?

READ OUT. Please select all that apply.

MULTI RESPONSE, RANDOMISE

Code	Answer list	Scripting notes	Routing
1	Planning		
2	Internal presentations		
3	Social media content		
4	Advertising or marketing – web	KEEP CODES 4-7 TOGETHER	
5	Advertising or marketing – print		
6	Advertising or marketing – TV and broadcast		
7	Advertising or marketing – social media		
8	Print collateral (e.g. flyers, magazines)		
9	In an editorial manner, using creative content to cover a topic or story		
10	TV and broadcast		
11	Game development/Concept art		
80	In another way (<i>please specify</i>)	TEXT RESPONSE, FIXED	
85	Don't know <i>Do not read out</i>	EXCLUSIVE	

Q24.

Base: those who have created/generated AI content in the last 12 months (Q11/1)

Still thinking about how you have used AI-created/generated content **<IF Q21/1, 3>: for commercial purposes ><IF Q21/2>: <in your personal/non-commercial projects>** in the last 12 months. Which of the following best describes how you have used it?

READ OUT. Please select all that apply.

MULTI RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	In place of stock image/video content		
2	In combination with stock image/video content		
3	Where I/we would not have previously used stock image/video content		
85	Don't know <i>Do not read out</i>	EXCLUSIVE	

Q25.

Base: those who have created/generated AI content in the last 12 months (Q11/1)

How would you rate the **quality** of the images or videos you created/generated with AI compared with stock images or videos?

In general, the AI-created/generated images or videos were ...

READ OUT. Please select one option.

SINGLE RESPONSE, FLIP CODES 1-5 SO THEY APPEAR IN REVERSE ORDER FOR 50%

Code	Answer list	Scripting notes	Routing
1	Much better quality		
2	Slightly better quality		
3	About the same quality as stock images/videos		
4	Slightly worse quality		
5	Much worse quality		
85	Don't know <i>Do not read out</i>	FIXED	

Q26.

Base: those who say much or slightly better (Q25/1-2)

And in what way(s) were the AI-created/generated images or videos better?

READ OUT. ASK ANYTHING ELSE. Please select all that apply.

MULTI RESPONSE, RANDOMISE

Code	Answer list	Scripting notes	Routing
1	Picture resolution		

2	Colour		
3	Lighting		
4	Realism		
5	Tailored to my needs		
80	In another way <i>(please specify)</i>	TEXT RESPONSE, FIXED	
85	Don't know <i>Do not read out</i>	EXCLUSIVE, FIXED	

Q27.

Base: those who say slightly or much worse (Q25/4-5)

And in what way(s) were the AI-created/generated images or videos worse?

READ OUT. ASK ANYTHING ELSE. Please select all that apply.

MULTI RESPONSE, RANDOMISE

Code	Answer list	Scripting notes	Routing
1	Picture resolution		
2	Colour		
3	Lighting		
4	Realism		
5	Not tailored to my needs		
80	In another way <i>(please specify)</i>	TEXT RESPONSE, FIXED	
85	Don't know <i>Do not read out</i>	EXCLUSIVE, FIXED	

Q28.

Base: those who have created/generated AI content in the last 12 months (Q11/1)

Which AI provider have you used to **create/generate** images or videos in the last 12 months?

DO NOT READ OUT. Please select all that apply.

MULTI RESPONSE, ORDER ALPHABETICALLY

Code	Answer list	Scripting notes	Routing
1	123RF AI Image Generator		
2	Adobe Suite (e.g., Firefly, Creative Cloud)		
3	Amazon: Titan, Nova, Amazon Ads image/video generator		
4	Canva AI, Canva Magic Studio		
5	OpenAI: ChatGPT, DALL-E, Sora		
6	ArtList		
7	Davinci		
16	StabilityAI: Dreamstudio, Stable Diffusion		
17	Envato AI		
18	Fotor		
19	FreePik		
9	Generative AI by Getty Images		
10	Generative AI by iStock		

11	Google: Nano Banana, Gemini, Imagen, Veo		
20	Imagen AI		
21	Skylum: Luminar Neo		
12	Meta AI: CM3leon, Emu		
13	Microsoft Copilot, Microsoft Image Creator from Designer		
22	Midjourney		
14	PicsartAI		
23	Pixlr		
15	Shutterstock AI		
80	Other (please specify)	TEXT RESPONSE	
85	Don't know	EXCLUSIVE	

Main questionnaire: Modifying images

Q29.

Base: those who have modified images or videos using AI in the last 12 months (Q12/1)

Earlier, you said that you had used AI to **modify** images or videos in the last 12 months.

For what purposes have you used the images or videos that you **modified** with this/these AI tool(s)?

READ OUT. Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	For commercial use only		
2	For personal/non-commercial use only		
3	A mix of both commercial and personal/non-commercial use		
85	Don't know <i>Do not read out</i>		

INFO. X2

Base: those who have modified images or videos using AI in the last 12 months for both commercial and personal/non-commercial use (Q29/3)

The following questions are about your use of AI tools to **modify** images or videos for **commercial** use.

Q30.**Base: those who have modified images or videos using AI in the last 12 months (Q12/1)**

How often have you used AI to modify images or videos in the last 12 months? A rough idea is fine if you don't know exactly how often.

*DO NOT READ OUT. Please select one answer.***SINGLE RESPONSE, ORDERED**

Code	Answer list	Scripting notes	Routing
1	Every day or most days		
2	Once or twice a week		
3	Once or twice a fortnight		
4	Once or twice a month		
5	Once or twice every three months		
6	Once or twice every six months		
7	Once or twice in the last 12 months		
85	Don't know		

Q31 REMOVED DURING DRAFTING**Q31a.****Base: those who have modified images or videos using AI in the last 12 months (Q12/1)**

In the last 12 months, what have you used AI-modified content for?

*READ OUT. Please select all that apply.***MULTI RESPONSE, RANDOMISE**

Code	Answer list	Scripting notes	Routing
1	Planning		
2	Internal presentations		
3	Social media content		
4	Advertising or marketing – web	KEEP CODES 4-7 TOGETHER	
5	Advertising or marketing – print		
6	Advertising or marketing – TV and broadcast		
7	Advertising or marketing – social media		
8	Print collateral (e.g. flyers, magazines)		
9	In an editorial manner, using creative content to cover a topic or story		
10	TV and broadcast		
11	Game development/Concept art		
80	In another way (<i>please specify</i>)	TEXT RESPONSE, FIXED	
85	Don't know <i>Do not read out</i>	EXCLUSIVE	

Q32.**Base: those who have modified images or videos using AI in the last 12 months (Q12/1)**

Still thinking about how you have used AI-modified content, how often (if at all) have you used **paid-for** stock image or video content, rather than any other image or video content (for example, in-house photography/video or free image/video content), as a **starting image or video**?

*READ OUT. Please select one option.***SINGLE RESPONSE, FLIP CODES 1-5 SO THEY APPEAR IN REVERSE ORDER FOR 50%**

Code	Answer list	Scripting notes	Routing
1	Always		
2	More often than not		
3	About half the time		
4	Less often than not		
5	Never		
85	Don't know <i>Do not read out</i>	FIXED	

Q33.**Base: those who have modified images or videos using AI in the last 12 months (Q12/1)**

How would you rate the **quality** of the AI-modified images or videos you made compared with unmodified stock images or videos?

In general, the AI-modified images or videos were ...

*READ OUT. Please select one option.***SINGLE RESPONSE, FLIP CODES 1-5 SO THEY APPEAR IN REVERSE ORDER FOR 50%**

Code	Answer list	Scripting notes	Routing
1	Much better quality		
2	Slightly better quality		
3	About the same quality as unmodified stock images/videos		
4	Slightly worse quality		
5	Much worse quality		
85	Don't know <i>Do not read out</i>	FIXED	

Q33a.**Base: those who say much or slightly better (Q33/1-2)**

And in what way(s) were the AI-generated images or videos better?

*READ OUT. ASK FOR ANYTHING ELSE. Please select all that apply.***MULTI RESPONSE, RANDOMISE**

Code	Answer list	Scripting notes	Routing
1	Picture resolution		
2	Colour		

3	Lighting		
4	Realism		
5	Tailored to my needs		
80	In another way <i>(please specify)</i>	TEXT RESPONSE, FIXED	
85	Don't know <i>Do not read out</i>	EXCLUSIVE, FIXED	

Q33b.

Base: those who say slightly or much worse (Q33/4-5)

And in what way(s) were the AI-generated images or videos worse?

READ OUT. ASK FOR ANYTHING ELSE. Please select all that apply.

MULTI RESPONSE, RANDOMISE

Code	Answer list	Scripting notes	Routing
1	Picture resolution		
2	Colour		
3	Lighting		
4	Realism		
5	Not tailored to my needs		
80	In another way <i>(please specify)</i>	TEXT RESPONSE, FIXED	
85	Don't know <i>Do not read out</i>	EXCLUSIVE, FIXED	

Q34.

Base: those who have modified images or videos using AI in the last 12 months (Q12/1)

In the last 12 months, which of the following AI providers have you used to **modify** images or videos?

DO NOT READ OUT. ASK FOR ANY OTHER SUPPLIERS. Please select all that apply.

MULTI RESPONSE, ORDER ALPHABETICALLY

Code	Answer list	Scripting notes	Routing
1	123RF AI Image Generator		
2	Adobe Suite (e.g., Firefly, Creative Cloud)		
3	Amazon: Titan, Nova, Amazon Ads image/video generator		
4	Canva AI, Canva Magic Studio		
5	OpenAI: ChatGPT, DALL-E, Sora		
6	ArtList		
7	Davinci		
8	StabilityAI: Dreamstudio, Stable Diffusion		
9	Envato AI		
10	Fotor		
11	FreePik		
12	Generative AI by Getty Images		
13	Generative AI by iStock		
14	Google: Nano Banana, Gemini, Imagen, Veo		

15	Imagen AI		
16	Skylum: Luminar Neo		
17	Meta AI: CM3leon, Emu		
18	Microsoft Copilot, Microsoft Image Creator from Designer		
19	Midjourney		
20	PicsartAI		
21	Pixlr		
22	Shutterstock AI		
80	Other (please specify)	TEXT RESPONSE	
85	Don't know	EXCLUSIVE	

Q35.

Base: those who have created/generated or modified content using AI in the last 12 months (Q11/1 or Q12/1)

You said you have used AI to <IF Q11/1 AND Q12/2,85: create/generate/IF Q11/2,85 AND Q12/1: modify/IF Q11/1 AND Q12/1: create/generate and modify> images or video in the last 12 months.

Did you use <BRAND>'s AI-creation/generation or AI-modification tools?

DO NOT READ OUT. Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No		
85	Don't know		

Q36.

Base: those who DID use parties' AI tools to create/generate or modify images or videos (Q35/1)

How far do you agree or disagree with the following statements about <BRAND>'s AI images or videos.

READ OUT. Please select one answer per statement.

SINGLE GRID, RANDOMISE ROWS

Code	Rows	Scripting notes	Routing
1	The quality of their AI images/videos is high		
2	Their AI tools are easy to use		
3	Their AI images/videos often need modifications in another / a different supplier's tool/platform		
4	They enable a wide range of images/videos to be generated		

5	Legal and ethical considerations make <BRAND>'s AI images/videos preferable to other AI image generators or modification tools		
---	--	--	--

Code	Answer list (columns)	Scripting notes	Routing
1	Strongly agree		
2	Tend to agree		
3	Neither agree nor disagree		
4	Tend to disagree		
5	Strongly disagree		
85	Don't know <i>Do not read out</i>		

Q37.

Base: all respondents

Some AI models are trained on images that were obtained with the consent of the artist/intellectual property holder, and others are trained on images where consent has not been obtained.

When considering whether to use AI to create/generate images or videos, how relevant to your decision is it that the AI model has been trained on images obtained **with consent**?

READ OUT. Please select one answer.

SINGLE RESPONSE, FLIP CODES 1-4 SO THEY APPEAR IN REVERSE ORDER FOR 50%

Code	Answer list	Scripting notes	Routing
1	Very relevant		
2	Fairly relevant		
3	Not very relevant		
4	Not at all relevant		
87	Not applicable - I would not consider using AI	FIXED	
85	Don't know <i>Do not read out</i>	FIXED	

Q38.

Base: all respondents

Looking ahead over the next 2 years, how much, if at all, do you expect your usage of AI to create/generate images or videos to change?

I expect my use of AI to create/generate images or video to...

READ OUT. Please select one answer.

SINGLE RESPONSE, FLIP CODES 1-5 SO THEY APPEAR IN REVERSE ORDER FOR 50%

Code	Answer list	Scripting notes	Routing
1	Increase considerably		
2	Increase slightly		
3	Stay about the same		
4	Decrease slightly		
5	Decrease considerably		

87	Not applicable - I don't plan to use AI at all	FIXED	
85	Don't know <i>Do not read out</i>	FIXED	

Q39.

Base: those who expect usage to increase considerably/slightly (Q38/1-2)

Why do you expect your usage of AI to create/generate images or videos to increase?

DO NOT READ OUT. ASK FOR ANYTHING ELSE. Please select all that apply.

MULTI RESPONSE

Code	Answer list	Scripting notes	Routing
1	Legal and licensing concerns are likely to reduce		
2	Technology will become easier to use		
3	The quality of AI is likely to improve		
4	The AI modification features I use are likely to improve		
5	The price of AI is likely to decrease		
6	To reduce time and costs in my creative workflow		
7	Greater public/customer/stakeholder acceptance		
80	Other (please specify)	TEXT RESPONSE. FIXED	
85	Don't know	EXCLUSIVE, FIXED	

Q40.

Base: those who expect usage to stay about the same or decrease considerably/slightly (Q38/3-5)

Why do you expect your usage to stay about the same or decrease?

DO NOT READ OUT. ASK FOR ANYTHING ELSE. Please select all that apply.

MULTI RESPONSE

Code	Answer list	Scripting notes	Routing
1	I have legal and licensing concerns		
2	I am already using AI to the extent I can		
3	I find it difficult or time-consuming to use the technology		
4	AI images are not of sufficiently high quality for me to use		
5	I use other creative tools/platforms to modify existing AI images		
6	The price of using AI is too high		
7	AI images lack authenticity		
80	Other (please specify)	TEXT RESPONSE, FIXED	
85	Don't know	EXCLUSIVE, FIXED	

Q41.**Base: Those who don't use AI (base: Q11/2,85 AND Q12/2,85)**

What, if any, are the biggest barriers to adopting AI image or video creation/generation
 <IF S05/1,3: in your business/organisation>?

DO NOT READ OUT. ASK FOR ANYTHING ELSE. Please select all that apply.

MULTI RESPONSE

Code	Answer list	Scripting notes	Routing
1	Company policy on AI		
2	Legal and licensing concerns		
3	Don't feel comfortable using AI that has been trained using data without consent		
4	Difficult/time-consuming/don't know how to use the technology		
5	Quality of AI-generated visuals		
6	Difficulty crafting effective prompts		
7	Concern over public/customer/stakeholder perception of using AI content		
8	Lack of authenticity		
9	Concern over remuneration of content creators		
10	Price		
80	Other (specify)	TEXT RESPONSE, FIXED	
85	Don't know	EXCLUSIVE, FIXED	
87	Not applicable - there are no barriers	EXCLUSIVE, FIXED	

Q41a.**Base: Those who do use AI (base: Q11/1 OR Q12/1)**

What, if any, are the biggest barriers to wider or more frequent adoption of AI image or video creation/generation <IF S05/1,3: in your business/organisation>?

DO NOT READ OUT. ASK FOR ANYTHING ELSE. Please select all that apply.

MULTI RESPONSE

Code	Answer list	Scripting notes	Routing
1	Company policy on AI		
2	Legal and licensing concerns		
3	Don't feel comfortable using AI that has been trained using data without consent		
4	Difficult/time-consuming/don't know how to use the technology		
5	Quality of AI-generated visuals		
6	Difficulty crafting effective prompts		
7	Concern over public/customer/stakeholder perception of using AI content		
8	Lack of authenticity		

9	Concern over remuneration of content creators		
10	Price		
80	Other (specify)	TEXT RESPONSE, FIXED	
85	Don't know	EXCLUSIVE, FIXED	
87	Not applicable - there are no barriers	EXCLUSIVE, FIXED	

Demographics

D01.

Base: those who have downloaded/purchased for commercial use only or for both commercial and personal/non-commercial use (S05/1, 3)

Approximately, how many employees currently work at your business/organisation across all sites in the UK and (if applicable) elsewhere?

DO NOT READ OUT, PROBE TO CODE. Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Just me		
2	2 - 9		
3	10 - 49		
4	50 - 199		
5	200 - 499		
6	500 - 999		
7	1000 - 4999		
8	5,000 +		
85	Don't know		

D02.

Base: those who have downloaded/purchased for commercial use only or for both commercial and personal/non-commercial use (S05/1, 3)

In relation to your use of image or video content, which of the following best describes your business/organisation?

READ OUT. Please select one answer.

SINGLE RESPONSE, ORDER ALPHABETICALLY

Code	Answer list	Scripting notes	Routing
1	Agency		
2	Corporate		
3	Media		
4	Marketing		
5	TV & Film production		
6	Small business/freelancer		
7	Charity/CIC/Not for profit		
80	Something else (please specify)	TEXT RESPONSE	
87	Not applicable - I am a personal/non-commercial user		

85	Don't know <i>Do not read out</i>		
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INCENTIVE QUESTIONS

C01.

Base: all respondents

As a thank you for taking part, we'd like to offer you £25. This can be in the form of a:

- GiftPay voucher (a **digital gift card** that can be used at a wide range of retailers)
- Charity donation on your behalf (choice of charities).

How would you like to receive your £25 thank you?

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Gift Pay voucher		
2	Charity donation		
87	I do not want to / cannot accept the £25 incentive		

C02.

Base: respondents with an email address who want a GiftPay voucher (C01/1)

Could you please confirm these details are correct so that we can send your £25 GiftPay voucher.

Please note that GiftPay vouchers are manually issued and therefore take 3-5 working days to be processed. We will endeavour to send these as soon as possible. Please only contact us if you have not received your voucher after 5 working days and after checking your spam/junk folder.

[PLEASE POPULATE EMAIL NAME AND ADDRESS FROM SAMPLE]

Name: OPEN

Email address: OPEN

Code	Answer list	Scripting notes	Routing
1	Yes		THANK & CLOSE
2	No		C03

C03.

Base: those who say details are incorrect for GiftPay voucher (C02/2) or who do not have an email address in the sample

Please enter your details below.

Name: OPEN

Email address: OPEN

C04.

Base: those who want the charity donation (C01/2)

Which of the following charities would you like the £25 to be donated to?

READ OUT

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Cities for Trees (improve lives by planting and caring for trees in cities)	THANK AND CLOSE	
2	Red Cross (humanitarian charity providing life-saving support during emergencies, disasters, and humanitarian crises)	THANK AND CLOSE	
3	Create (charity that runs creative arts projects with children and adults facing challenges in their lives)	THANK AND CLOSE	
87	I do not want to donate £25 to any of these charities.		

C05.

Base: those who don't want to donate to any of the three charities (C04/87)

Would you like to accept the £25 Gift Pay voucher instead?

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Yes		GO BACK TO C02
2	No – I will forgo the £25 incentive		THANK AND CLOSE

Thank you: that is the end of the survey.

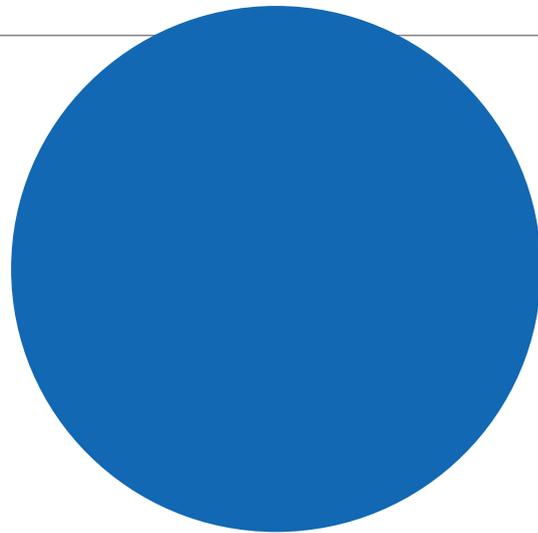
ENDCATI:

Can I just remind you that this interview is part of a market research survey being carried out by DJS Research who adhere to the Market Research Society Code of Conduct. If you want to verify that we are a bona fide consultancy, I can give you the Freephone number of the Market Research Society to ring.

GIVE NUMBER IF REQUIRED (+44 (0) 800 975 9596).



For more information



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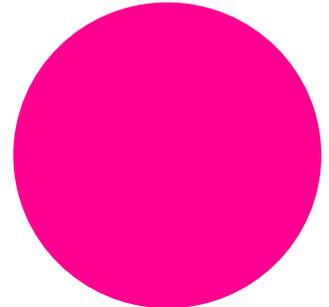
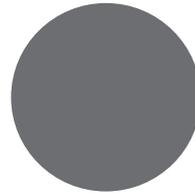
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