

The GSIM-Research Group



Prof. Dr. Johannes Glückler
Professor of Economic and Social Geography
Research Group Director



Martina Jordan
Research Associate



Robert Panitz
Research Associate



Jinliao He
Research Associate



Hans-Georg Höllerer
Research Assistant

Contact:

University of Heidelberg
Chair of Economic and Social Geography
Research Group on the
Global Stock Image Market
Prof. Dr. Johannes Glückler
Berliner Str. 48
D-69120 Heidelberg, Germany



Email: GSIM@uni-hd.de

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How does the survey work?

- ▶ This first worldwide survey on the global stock image market will start in May 2012.
- ▶ Based on own research and with the support of PACA and CEPIC the survey covers 2,900 picture agencies that trade stock photography and video footage across the globe.
- ▶ Every picture agency receives an invitation via email that provides access to the survey website. Full response to the questionnaire will take about 15 minutes - a small commitment for a unique market insight.
- ▶ All participants receive an exclusive report with the findings of the global survey by late summer 2012.
- ▶ This study is liable to the rigorous criteria of good scientific practice. All data will be handled confidentially and only used within this research project.
- ▶ Please help to create a comprehensive understanding of the size, the dynamics and the opportunities of the global picture market. If you have further questions concerning this survey please feel free to contact us. Thank you for your support.

1st Global Survey 2012

Heidelberg Research Group on The Global Stock Image Market

www.stockimagemarket.uni-hd.de

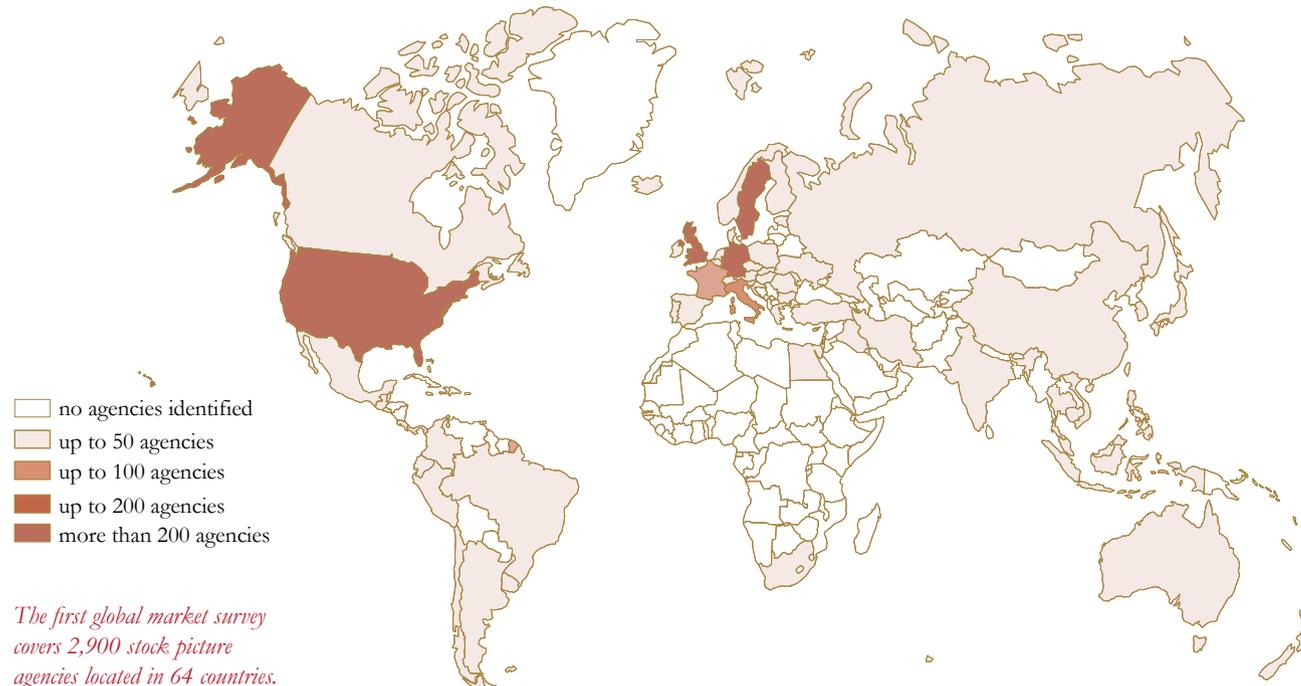


The First Global Survey of the Industry

- ▶ The picture market has never been studied at a fully global scale. Even today, our knowledge of the size of the market and other characteristics depends on the educated guess of experienced business insiders rather than systematic research. The market includes all picture agencies and archives that commercially trade usage rights of still (photography) and moving images (video footage).
- ▶ What is the size of the global picture trade? How do picture agencies reach their markets? What are appropriate business models? Where are the new markets? These and other questions will be studied by a survey that comprises 2,900 agencies across the world and promises a complete picture of the industry.



The global stock photo and footage market 2012



The first global market survey covers 2,900 stock picture agencies located in 64 countries.

Goals of the Research Group

- ▶ Since 2005, the Research Group has conducted several industry studies commissioned by diverse business associations (e.g. CEPIC, BVPA). In addition the group has done academic research on the profound transformations in technology, business models and market relations.
- ▶ We are interested in the ways picture agencies face these changes and adapt to new environments and opportunities. We aim at analyzing why some strategies are more successful than others and how agencies can respond to an increasingly globalizing picture business.
- ▶ The survey is part of a research program funded by the German Science Foundation (DFG) and gratefully supported by CEPIC and PACA, the largest associations for stock photography in Europe and North America.

Our Research in the Media



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Industry Round Table, Cepic Congress, Dublin 2010

- ▶ „Prof. Glückler's presentation was just fascinating and most likely one of the best industry surveys that I have ever been given to read and hear for the past 10 years.“
Franck Perrier, Knowing your industry, 2008 CEPIC Congress, Malta at www.cepic.org
- ▶ „Glückler predicts that the industry will continue to see significant changes every few years.“
Shannon Fagan, Insights gleaned from CEPIC, 2010 CEPIC Congress, Dublin
www.selling-stock.com/Article/insights-gleaned-from-cepic

Academic Publications

- ▶ Glückler J (2010) The evolution of a strategic alliance network: Exploring the case of stock photography. In R Boschma, Martin R (Eds.) Handbook of Evolutionary Economic Geography: Edward Elgar, 298-315.
- ▶ Glückler J (2005) Digitalisierung und das Paradox informatorischer Reichweite in der Agenturfotografie [Digitization and the paradox of informational range in stock photography]. *Geographische Zeitschrift* 93 (2): 100-120.