

State of the Photography Industry Survey Report

Q1 2022

zenfolio | **FORMAT**



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Introduction

We surveyed photographers and image-makers from around the world, to understand their experience and get their perspective on photography in 2022.

This report gives you juicy insights into what's happening in the photography industry and brings ideas that could help take your business to the next level or give you some direction if you're wondering "what's next?".

Report Highlights



Demographics: Out of the 3,398 photographers surveyed, across 97 different countries, we found that 71% of respondents are full-time or part-time self-employed photographers, with the remainder made up of hobbyists, students, and full-time employees.



Sentiment: Compared to how photographers were feeling at the same time last year, there is a general sense of (cautious) optimism with 57% of respondents feeling like 2022 will be a stronger year than the last.



Types of Photography: Our survey results showed the top 3 photography specializations are: portrait photography, landscape photography, and wedding photography. Find out where the rest of the specializations landed, and see where photographers are focusing their efforts with regard to promotion, new business, and revenue.

REPORT HIGHLIGHTS CONTINUED



Camera Gear: Canon and Nikon are still the heavy-hitters in the digital photography space, followed by Sony, and Fujifilm. Find out which cameras, and lenses, are most popular with peers from your photography specialty. Fan-favorite lenses like the 50mm, 24-70mm and 70-200mm made appearances in the top 3, but find out what gear your fellow photographers are using.



Impact of COVID: It's no secret that COVID has had a major impact on the entire industry. Find out how other segments of the photography industry fared, and check out what fresh ideas photographers brought to the table to keep their businesses viable during such a challenging time.



Revenue: Money talks! See who had slower-than-average years, and who got busier. We dive into the various tactics photographers are using and what generated the most income.

Demographics

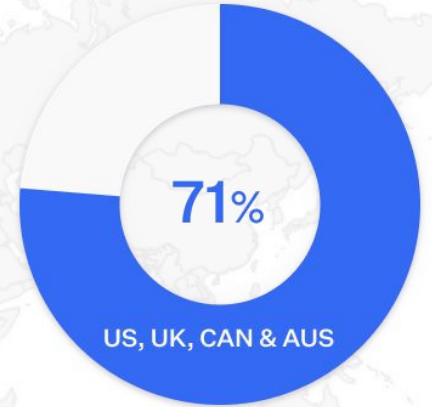
The March 2022 survey reflects feedback from 3,398 photographers in 97 countries around the world. 71% of responses were from the US, UK, Canada and Australia, with the US accounting for over half. Among the smallest and most remote countries represented were Trinidad & Tobago, Equatorial Guinea, and Lesotho.

The Who and The Where

3,898 photographers.

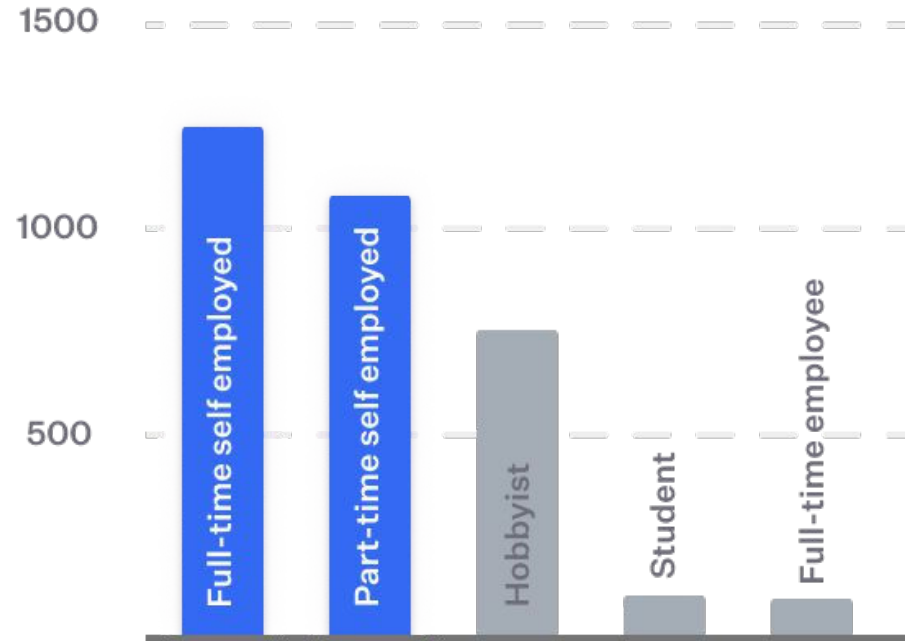
97 countries around the world.

71% of responses from US, UK, Canada & Australia, with US accounting for over half.



DEMOGRAPHICS CONTINUED

Full and part-time self-employed photographers also accounted for 71% of respondents, with photography hobbyists, students and employees making up the balance. The data reflects the views of a seasoned group, as over half of survey participants reported having more than 10 years experience.

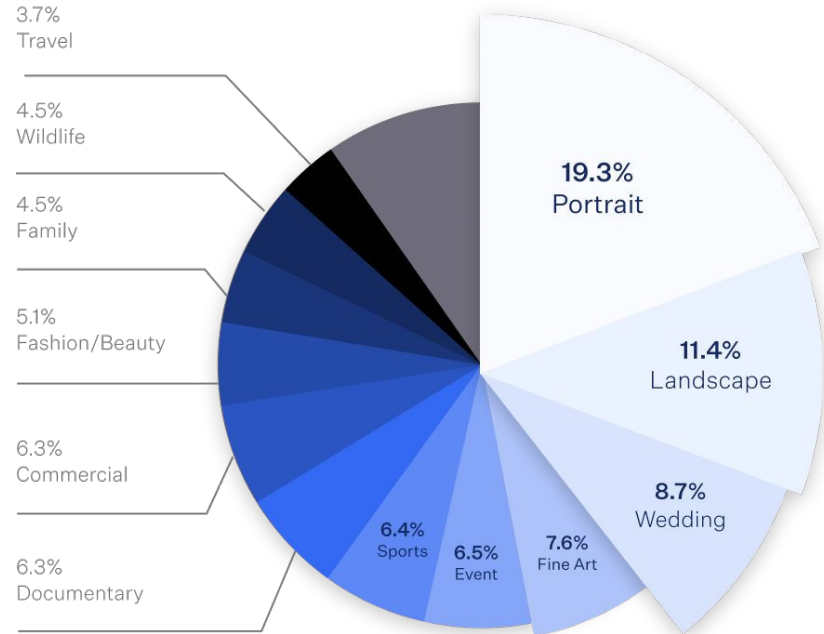


Specialty

The primary photography specializations indicated in the March 2022 survey were highly diversified across **15 genres** reported. While the leading genre might be expected, the second and third largest categories were surprisingly positioned:

1. **Portraits - 19.3%**
2. **Landscape - 11.4%**
3. **Wedding - 8.7%**

Fine Art followed at 7.6% and then a tightly bunched group were Events, Sports, Documentary and Commercial, all coming in at 6.3-6.5% each. Fashion/Beauty, Wildlife, Family and Travel came in with progressively smaller slivers of the pie.

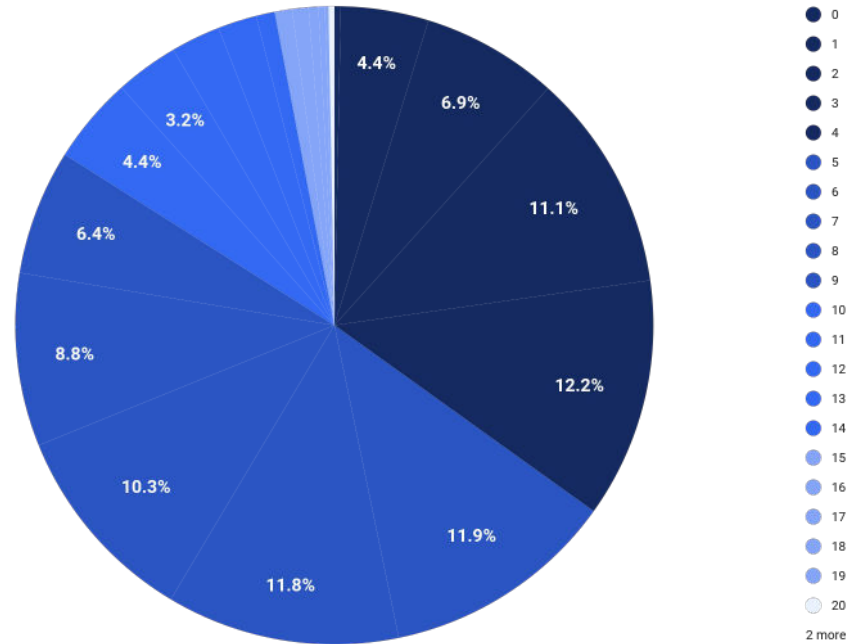


SPECIALTY CONTINUED

Our survey also identified all photography specialties shot by photographers.

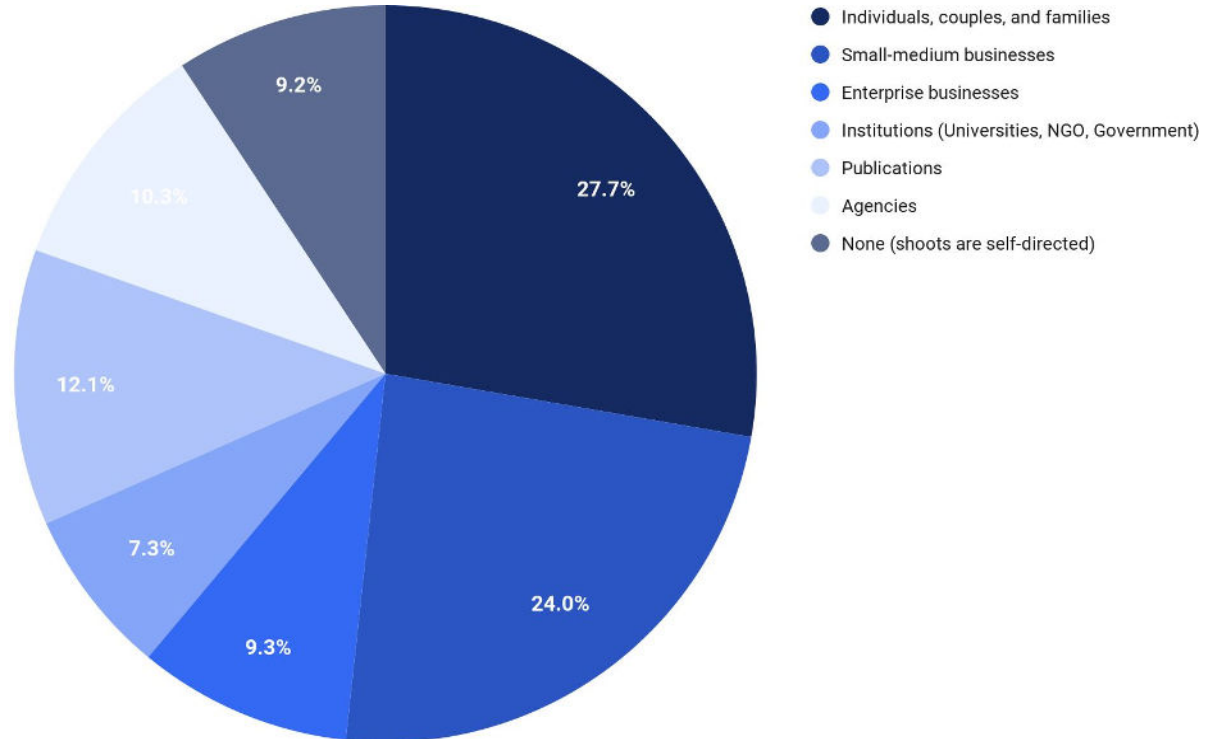
12% of photographers report shooting up to 4 photography specialties.

Number of photography specialties



Clients

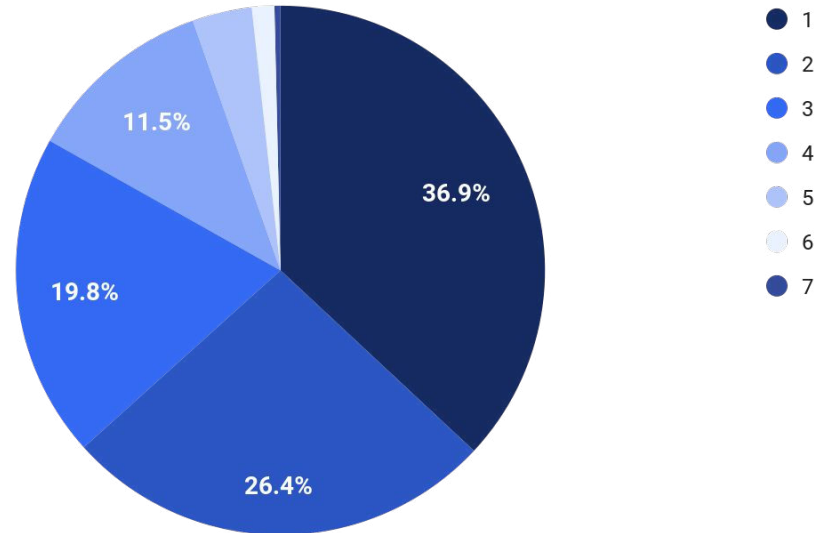
The vast majority of clients are categorized as individuals or small/medium businesses, while enterprise, institutions, publications and agencies comprise the rest.



CLIENTS CONTINUED

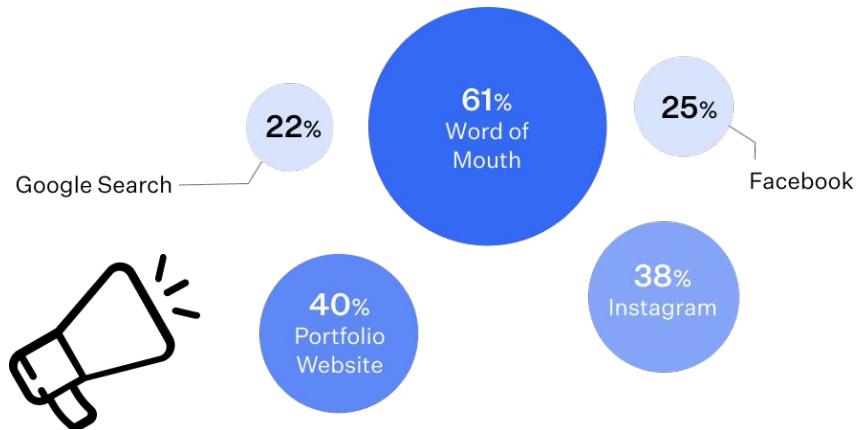
Over 83% of photographers disclosed that they work with 3 or fewer types of clients, with 37% saying that they work with just one type.

Number of client types that photographers work with

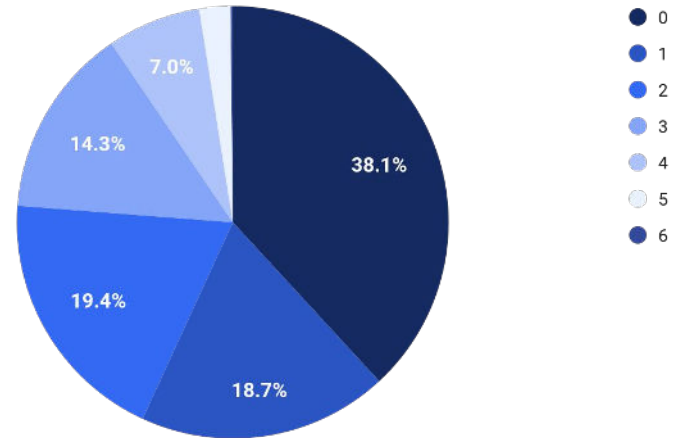


CLIENTS CONTINUED

When it comes to finding clients, traditional word-of-mouth marketing is still the top method, while portfolio websites are the most important online tool for client acquisition. Instagram is the preferred social media channel for showing off work to reach a larger audience.



Number of channels to acquire new customers

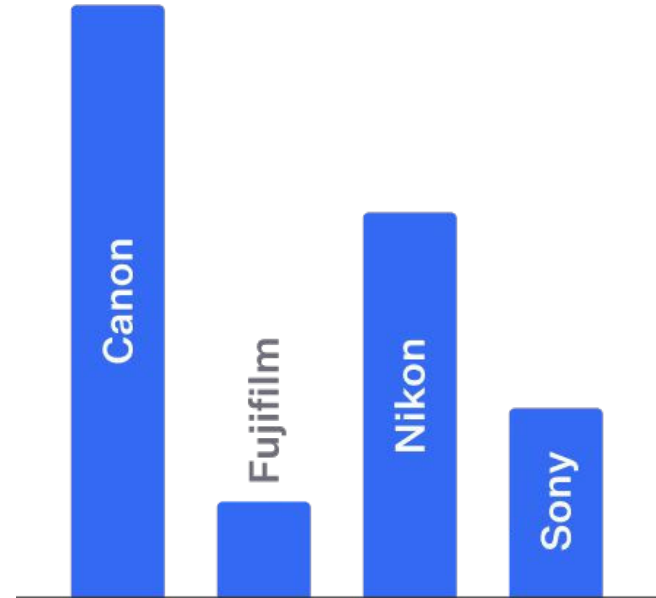


Gear

The decades-long Canon vs Nikon rivalry was also illustrated in the survey results. As both brands evolved from film to digital to mirrorless technology, photographers of every level, from beginner to pro, gravitate primarily to these top two brands, and Q1 2022 was no exception

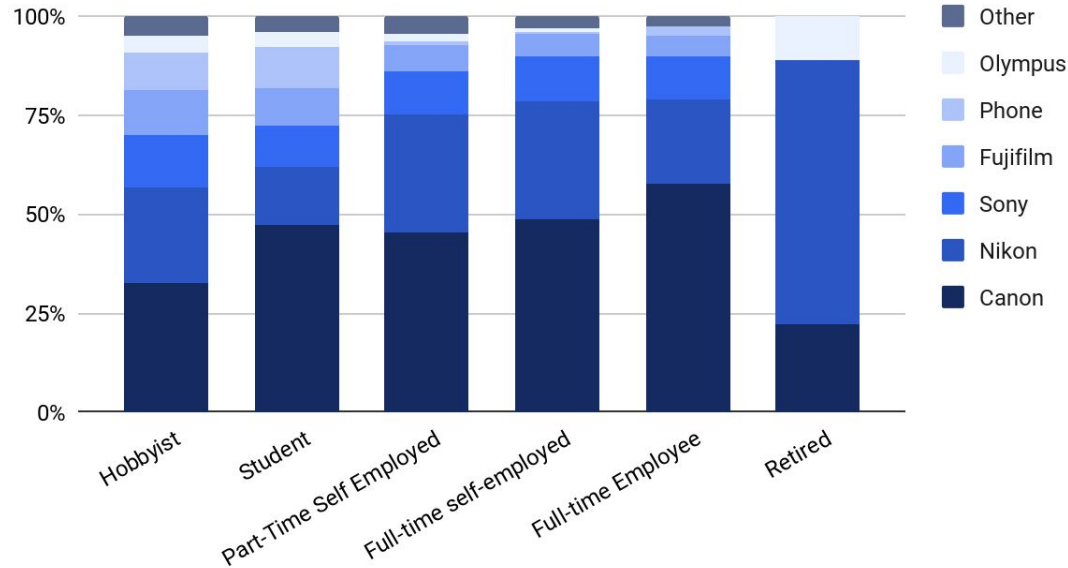
Canon and Nikon dominate, holding over 70% of the respondents.

Sony and Fujifilm represent 15% and 7%, respectively.



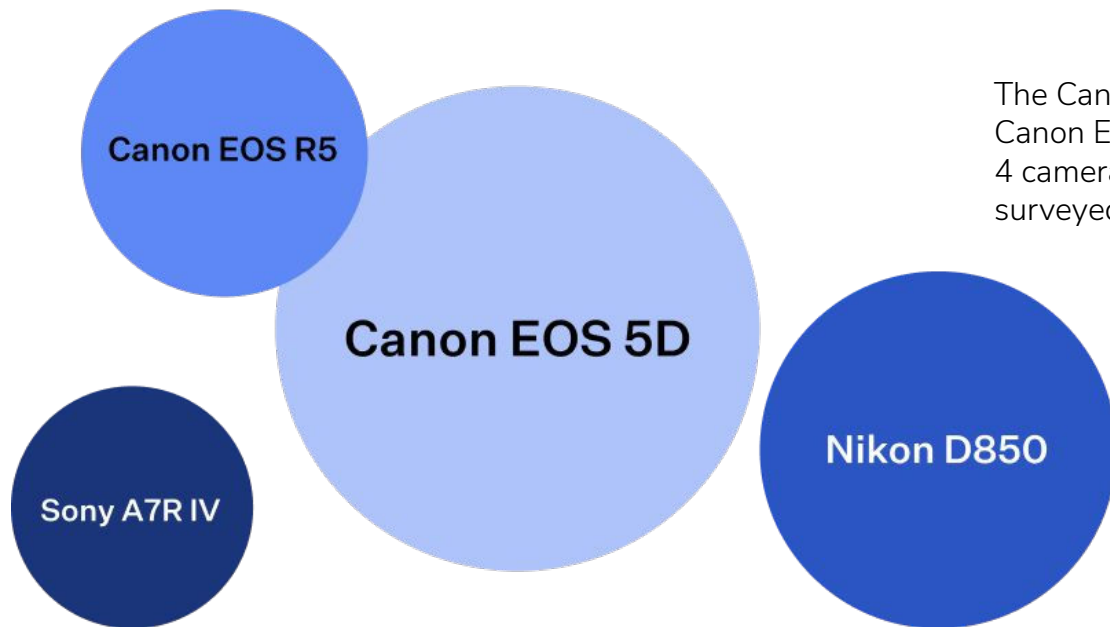
GEAR CONTINUED

Camera brand by employment status



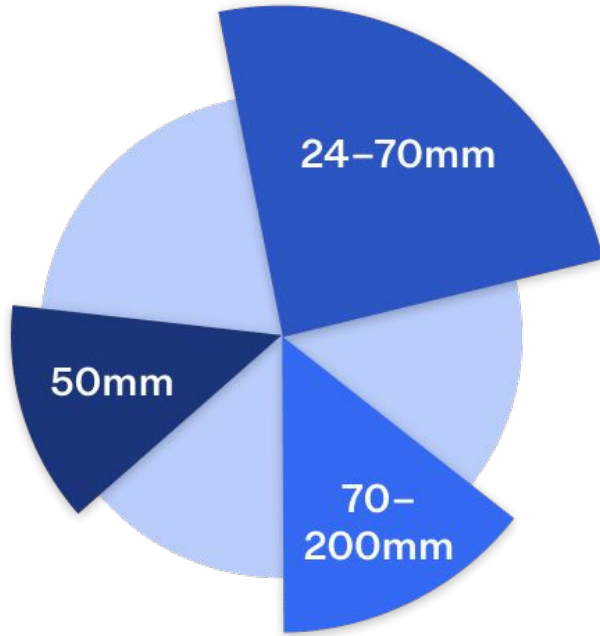
Retirees in the survey preferred Nikon camera bodies at a higher percentage than other groups.

GEAR CONTINUED



The Canon EOS 5D Mark IV, Nikon D850, Canon EOS R5 and the Sony A7R IV are the top 4 camera models used by photographers surveyed.

GEAR CONTINUED



Looking at all photography specialites, zoom lenses come in over prime lenses with the top 3 preferred focal lengths being:

1. 24-70mm
2. 70-200mm
3. 50mm

GEAR CONTINUED

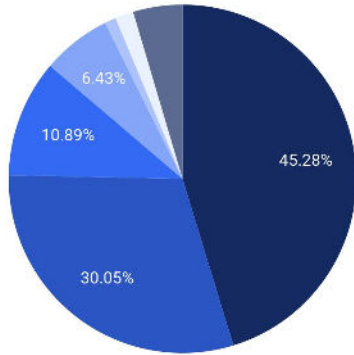
Top 3 lenses by specialty: portrait, wildlife, and still life favor prime lenses (over zoom lenses) as their top choices.

Portrait	Landscape	Wedding	Sports	Commercial	Event	Documentary	Fine Art	Fashion/Beauty	Family	Wildlife
85mm	24-70mm	24-70mm	70-200mm	24-70mm	24-70mm	24-70mm	50mm	24-70mm	24-70mm	500mm
50mm	16-35mm	70-200mm	400mm	70-200mm	70-200mm	35mm	24-70mm	85mm	70-200mm	600mm
24-70mm	70-200mm	50mm	300mm	85mm	50mm	50mm	35mm	50mm	50mm	400mm

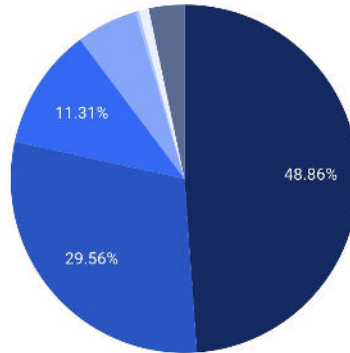
Lifestyle	Travel	Real Estate	Editorial	Product	Food	Baby	Still Life	Boudoir	School
24-70mm	24-70mm	16-35mm	24-70mm	50mm	24-70mm	24-70mm	50mm	50mm	24-70mm
50mm	16-35mm	24-70mm	70-200mm	24-70mm	50mm	35mm	85mm	24-70mm	70-200mm
35mm	35mm	24mm	50mm	105mm	105mm	50mm	24-70mm	35mm	85mm

GEAR CONTINUED

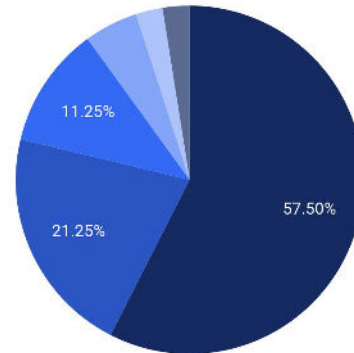
Part-Time Self Employed



Full-time self-employed



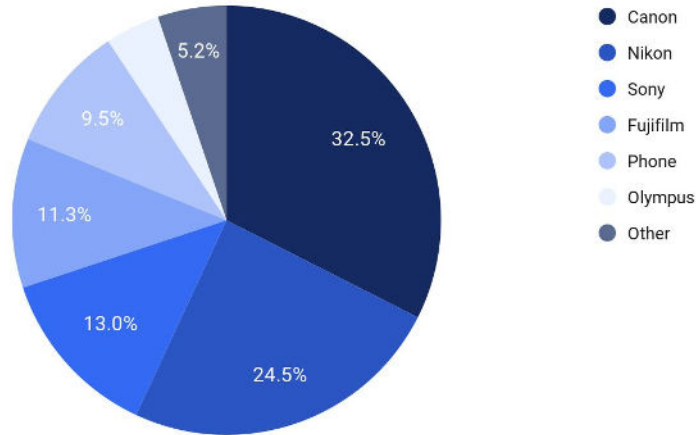
Full-time Employee



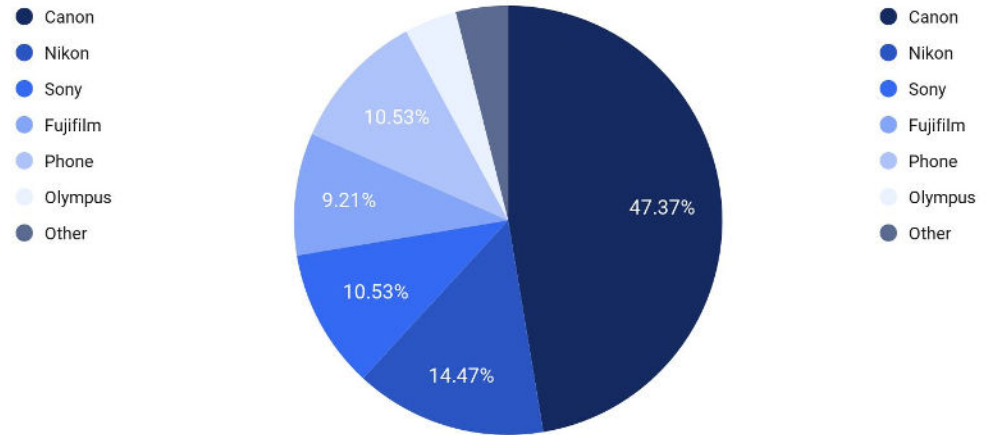
- Canon
- Nikon
- Sony
- Fujifilm
- Phone
- Other

GEAR CONTINUED

Hobbyist



Student

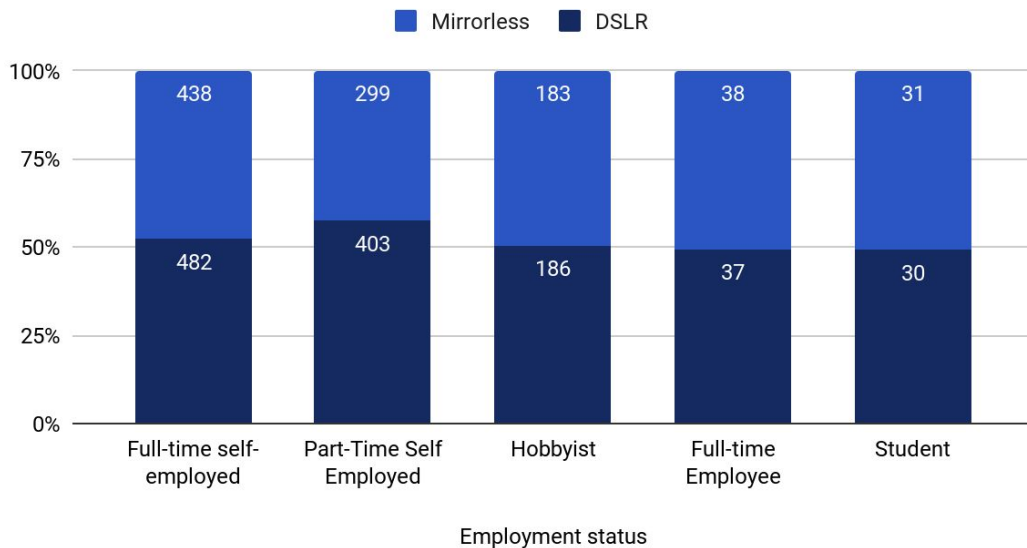


10% of students and hobbyists embrace mobile photography, but full-and-part-time professionals forego their phone in favor of standard equipment.

GEAR CONTINUED

Among the big four, adoption of Mirrorless vs DSLR is equally split among all groups based on employment status.

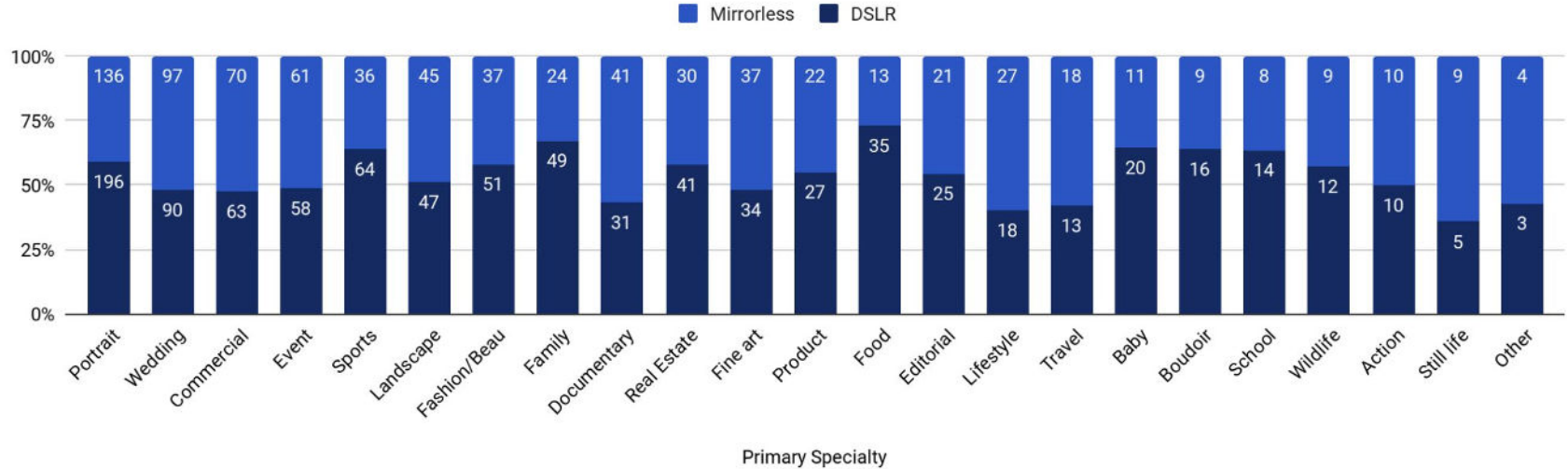
DSLR and Mirrorless - Canon, Nikon, Sony, Fujifilm



GEAR CONTINUED

Strong adopters of mirrorless cameras can be seen in specialties where a lighter, less obtrusive camera makes sense: documentary, lifestyle, and travel. Similarly, sports and food photographers, along with several types of portrait photographers (portrait, family, baby, boudoir, school) are happy to stay with the tried-and-true (and bulkier) DSLR.

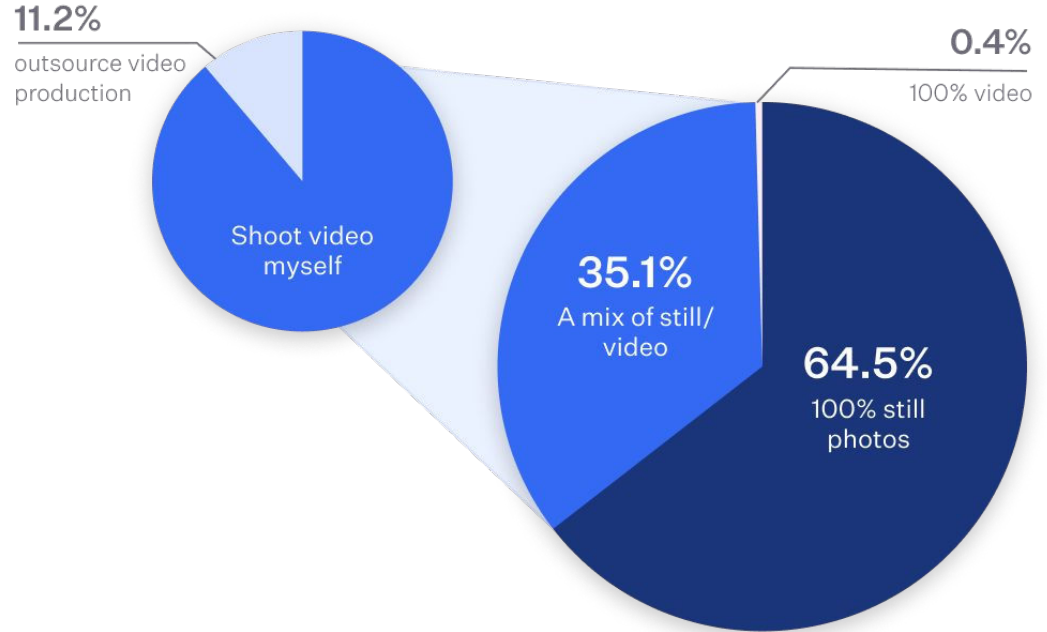
DSLR vs Mirrorless - by specialty



Output: Still vs Video

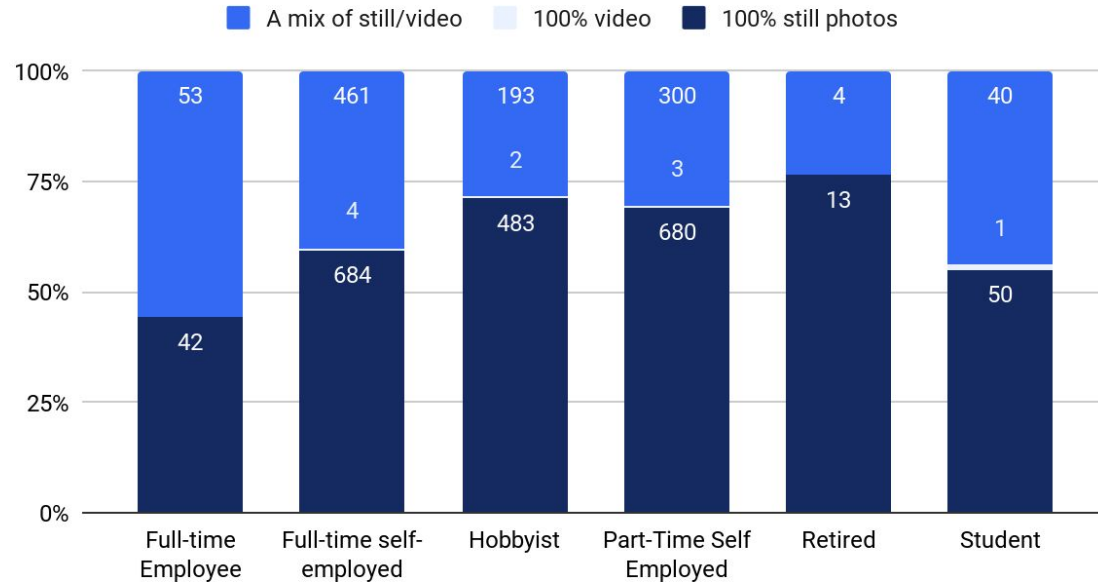
Even though most digital cameras can shoot both still images and video, the survey reflected that still photography is by far the primary medium for most of the survey participants with 64% shooting stills and 35% shooting a mix of still and video. Merely 11% divulged outsourcing video production to someone else.

Online file transfer accounts for half of the logistics for video delivery.



OUTPUT: STILL VS VIDEO CONTINUED

Photo / Video by employment status



OUTPUT: STILL VS VIDEO CONTINUED

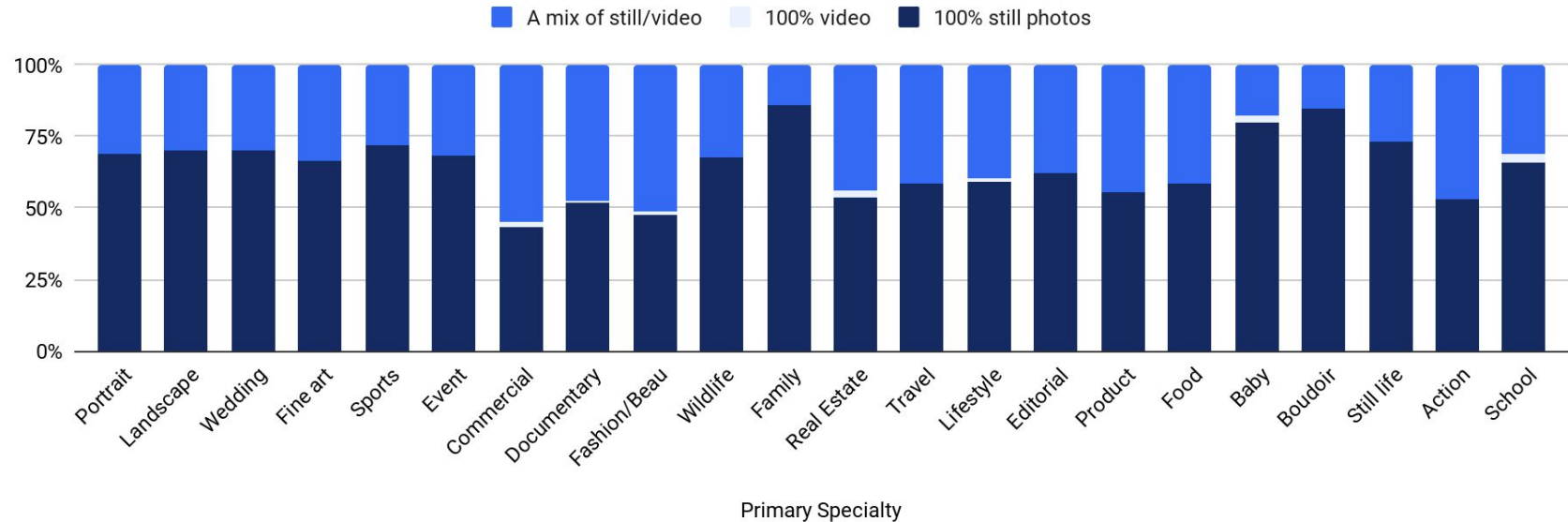
Who shoots your video? Based on employment status



OUTPUT: STILL VS VIDEO CONTINUED

Commercial photographers lead the specialties in shooting both still and video. Perhaps it is not a surprise that boudoir is the specialty that is most dedicated to shooting 100% still images,

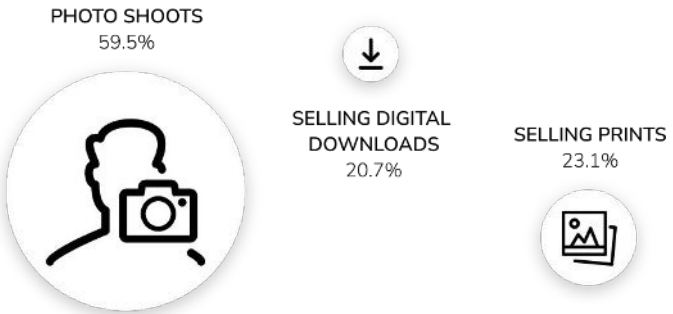
Photo / Video by Primary Specialty



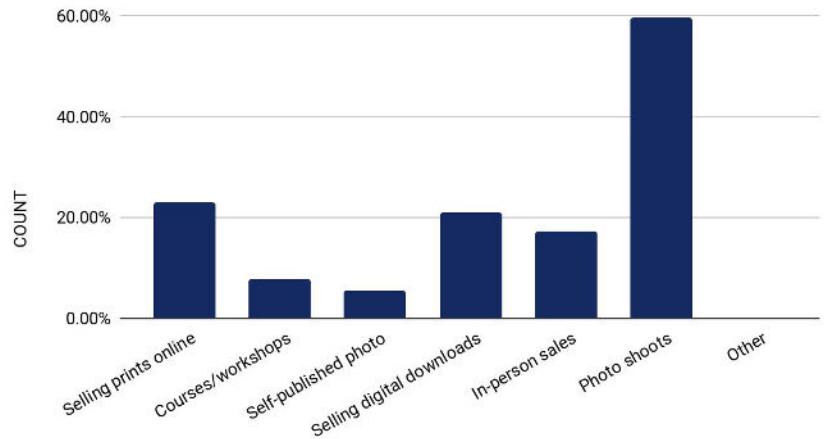
Revenue

Close to 60% of respondents generated revenue from photo shoots or session fees. Respondents also generated revenue from selling prints digital downloads online.

What might not be expected is that online sales of prints and digital downloads beat out in-person sales. This is likely due to COVID restrictions and the growing acceptance of online sales in general.



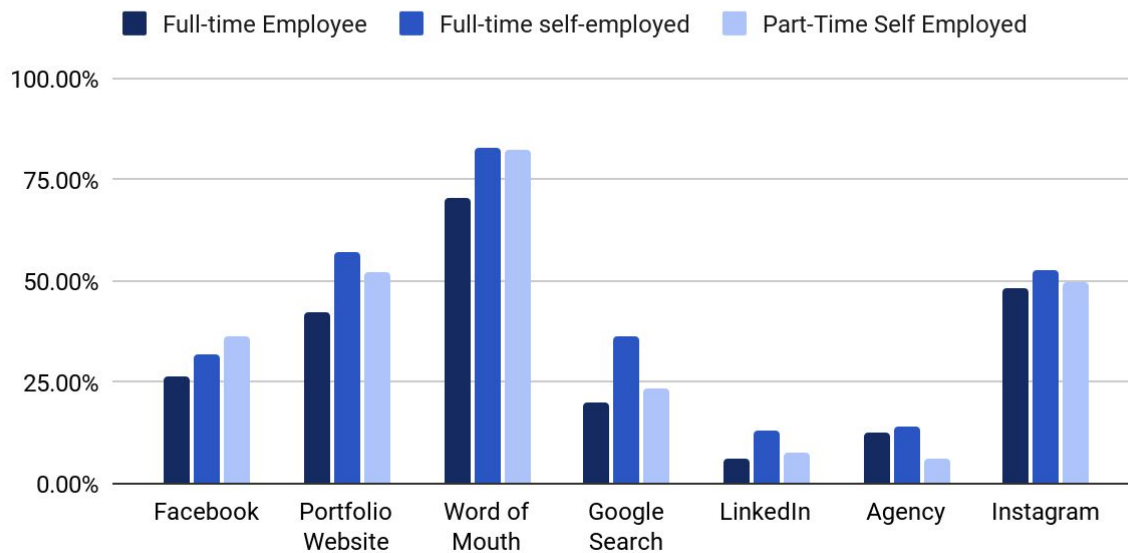
Revenue sources



REVENUE CONTINUED

How do you get new clients?

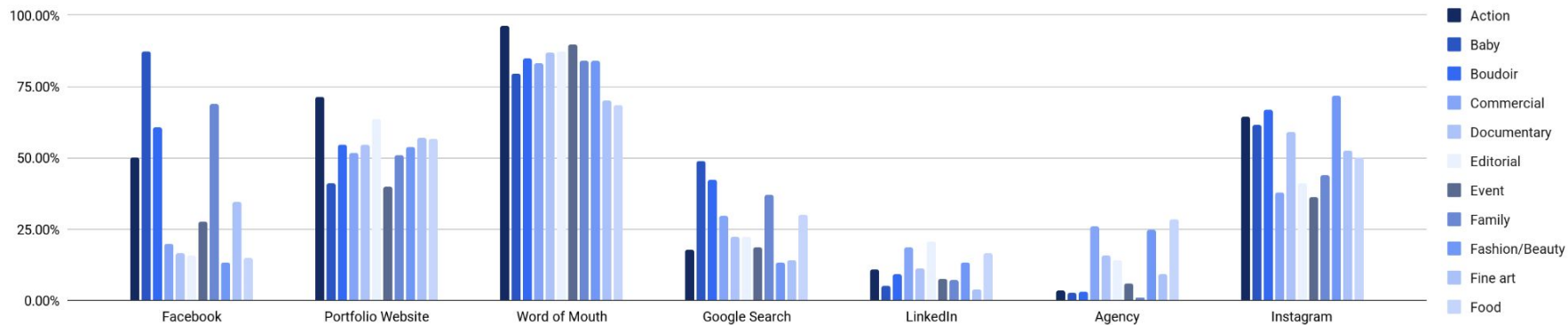
by employment status



REVENUE CONTINUED

How do you get new clients?

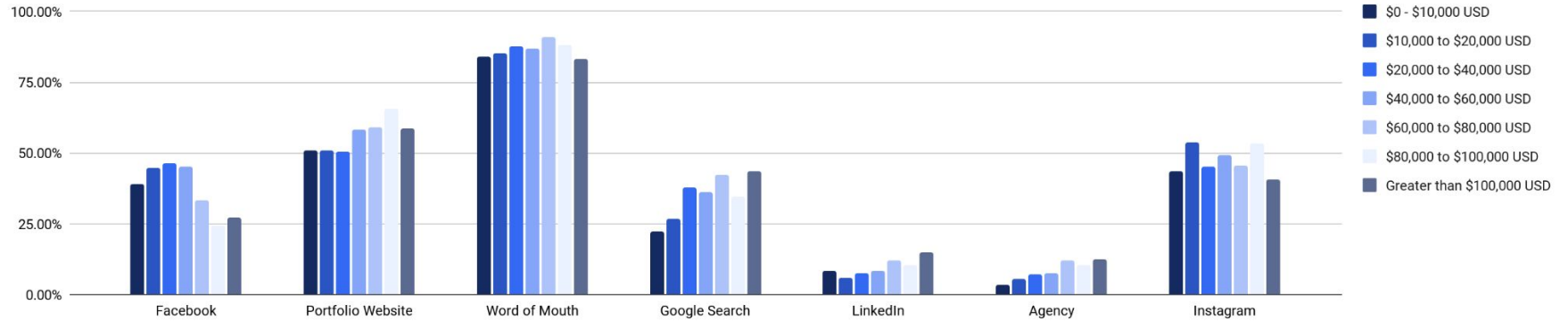
by Primary Specialty



REVENUE CONTINUED

How do clients find you?

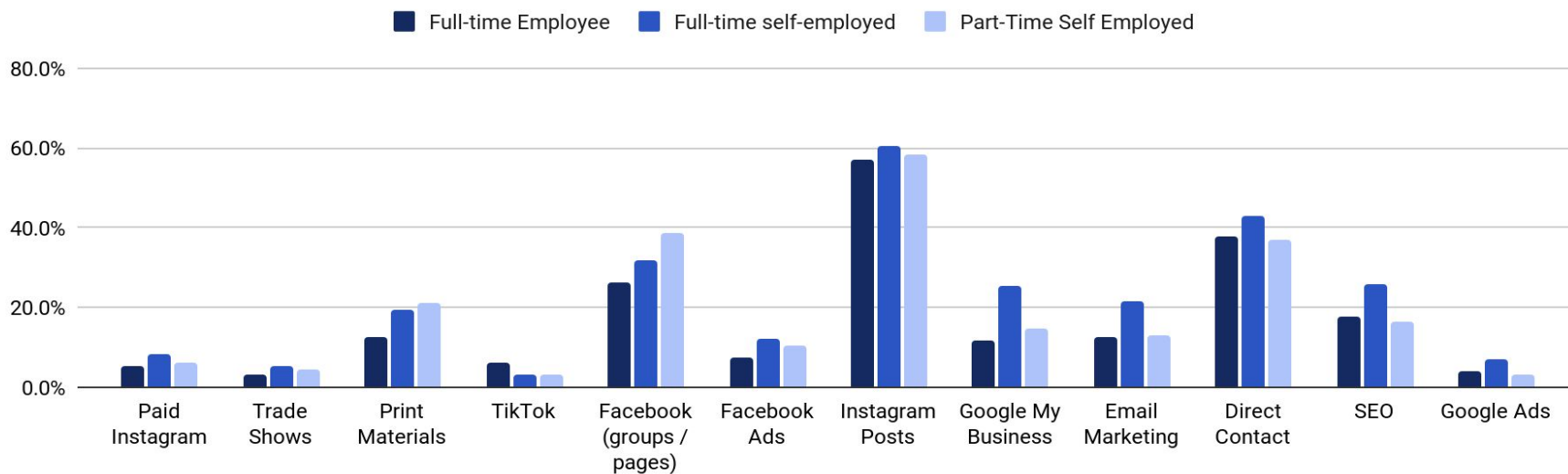
by Annual Gross Income (USD)



REVENUE CONTINUED

How do you promote/market your business?

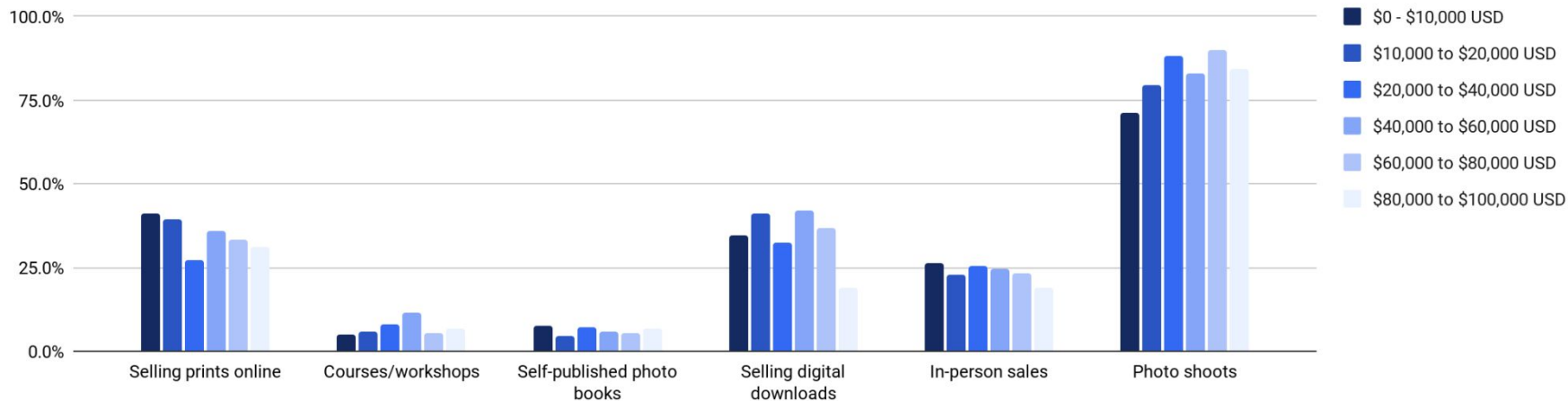
by work status



REVENUE CONTINUED

How do you generate revenue?

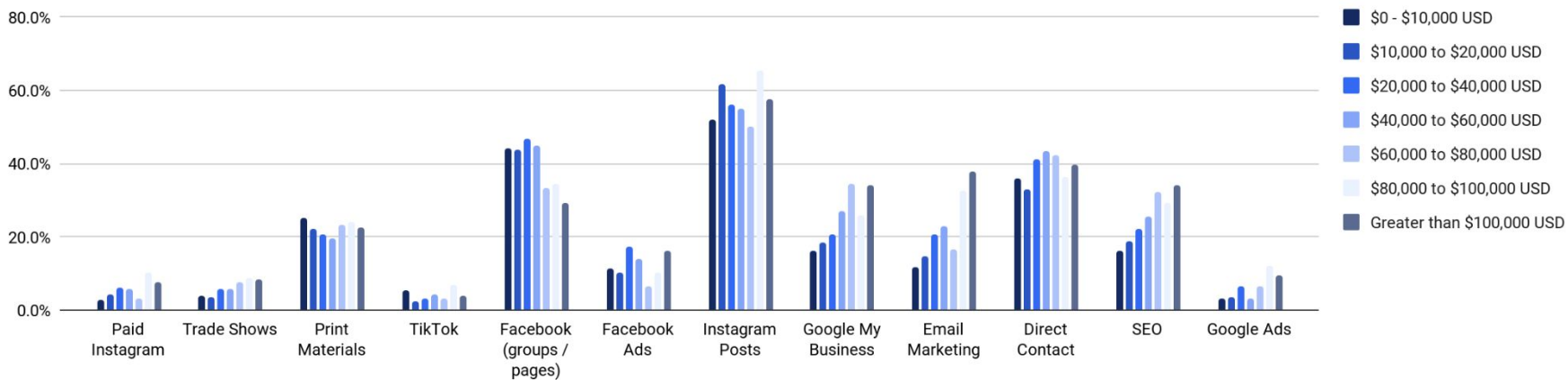
by annual income (USD)



REVENUE CONTINUED

How do you promote/market your photography business?

by annual income (USD)



COVID Impact and Outlook

COVID IMPACT ON 2021 ACTIVITY

18.8% ▲

of photographers thought business was **busier** than expected.

17.3% ■

of photographers thought business was **about the same** as expected.

63.8% ▼

of photographers thought business was **slower** than expected.

EXPECTED ACTIVITY IN 2022

56.5% ▲

of photographers think business will get **busier**.

32.2% ■

of photographers think business will remain **steady**.

11.3% ▼

of photographers think business will **decline**.

The pandemic-driven business rollercoaster of 2021 has given way to a more consistent and optimistic outlook for 2022. Find results of the 2021 Industry survey [here](#).



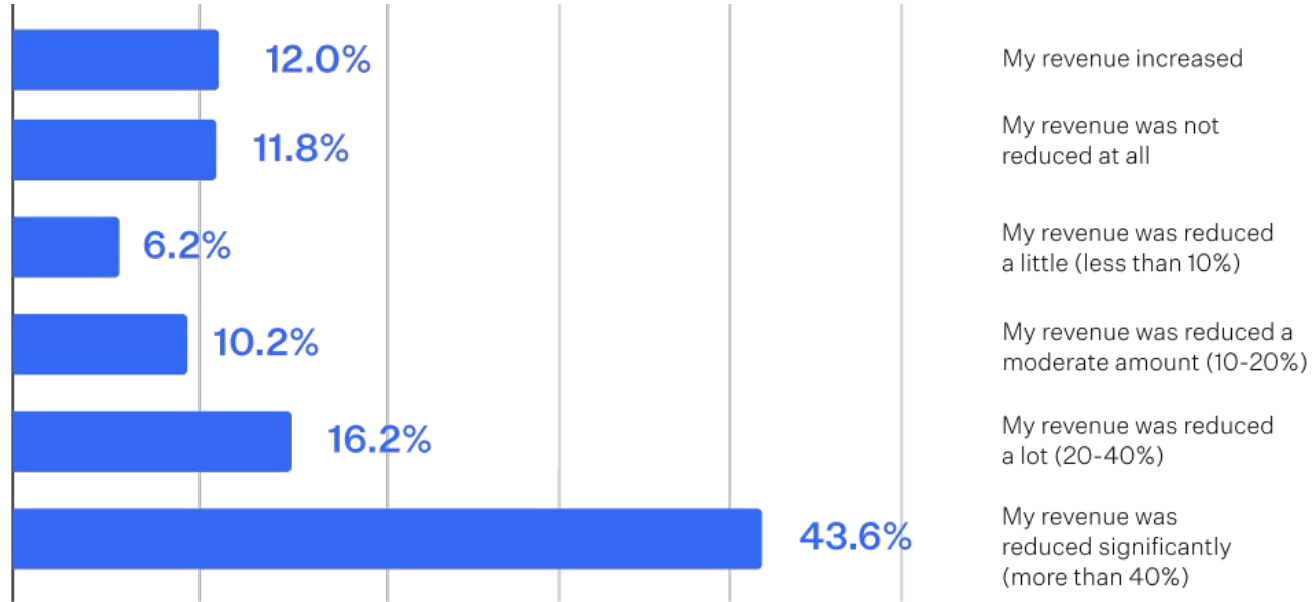
Optimism... With a Caution Light

Survey participants are cautiously optimistic about the current business climate.

89% reflect an overall optimistic attitude about business this year.

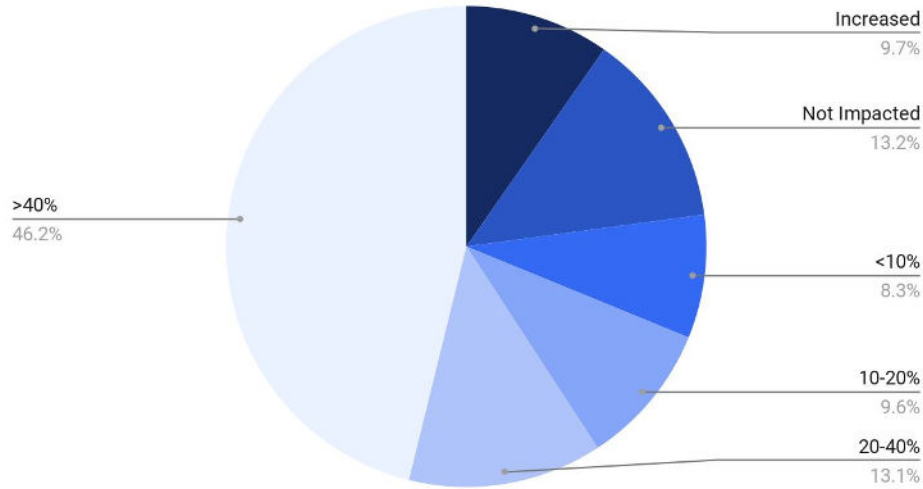


COVID IMPACT CONTINUED



COVID IMPACT CONTINUED

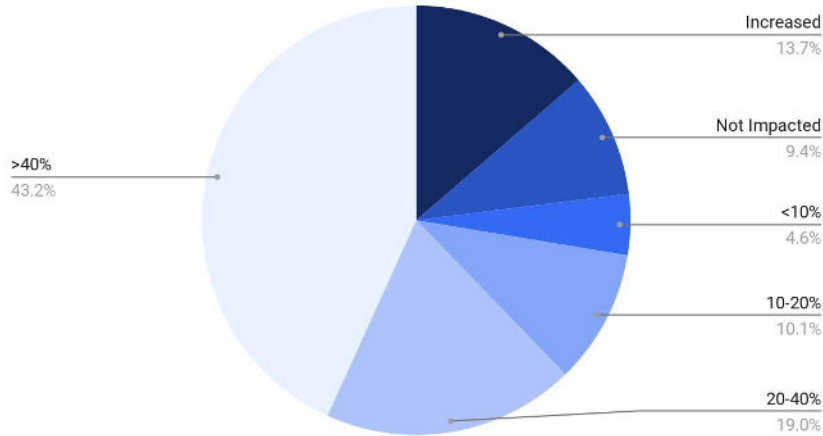
Part-Time Self Employed



Respondents who identified as part-time self-employed were the most negatively impacted during COVID, as nearly half reported losing more than 40% of normal revenue during 2021.

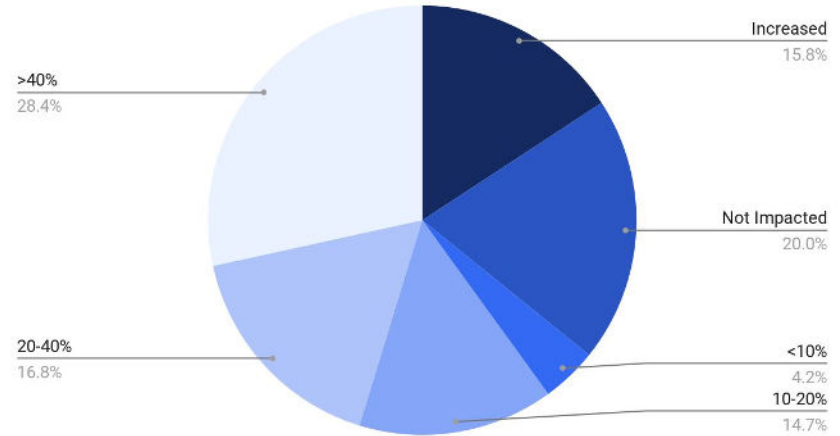
COVID IMPACT CONTINUED

Full-time self-employed



Full-time self-employed were similarly affected as 43% lost over 40% of revenue.

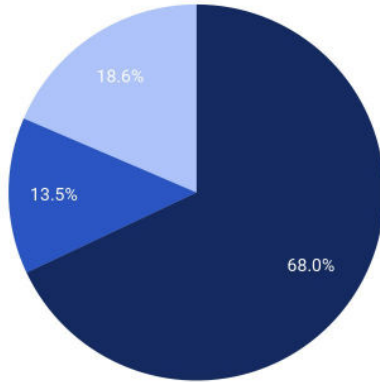
Full-Time Employee



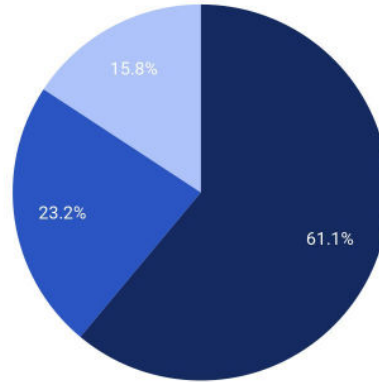
Full-time employees were the most insulated from COVID with the largest proportion indicating no impact or even improvement.

COVID IMPACT CONTINUED

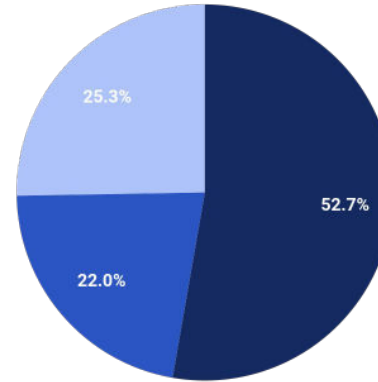
Part-Time Self-Employed



Full-Time Self-Employed



Full-time Employees

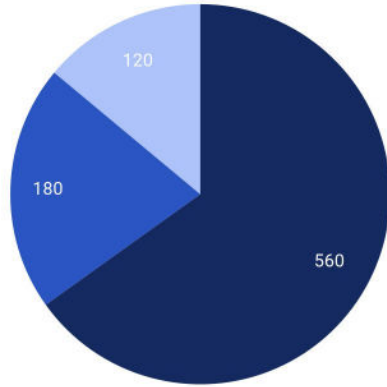


- Slower than expected
- Busier than expected
- About the same as expected

Over half of photographers, whether part-time or full-time, employed by a business or self-employed indicated business was slower than expected in 2021.

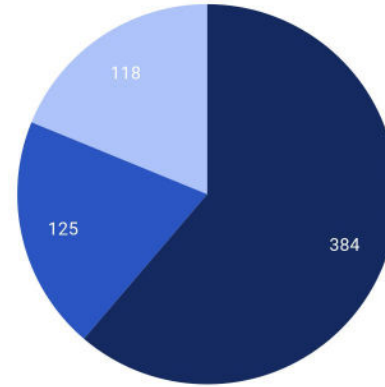
23% of Full-Time, and 14% of Part-Time photographers were busier than expected.

People - 1:1



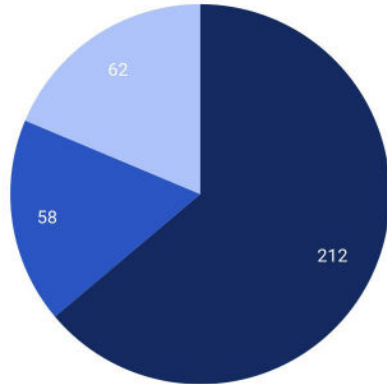
- Slower than expected
- Busier than expected
- About the same as expected

Commercial



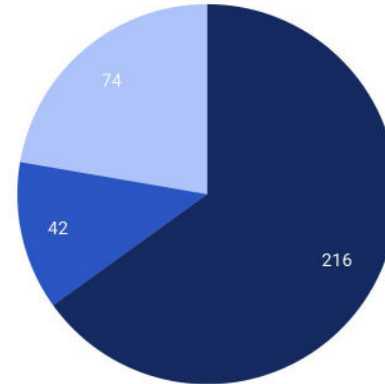
- Slower than expected
- Busier than expected
- About the same as expected

People - 1 to many



- Slower than expected
- Busier than expected
- About the same as expected

Art

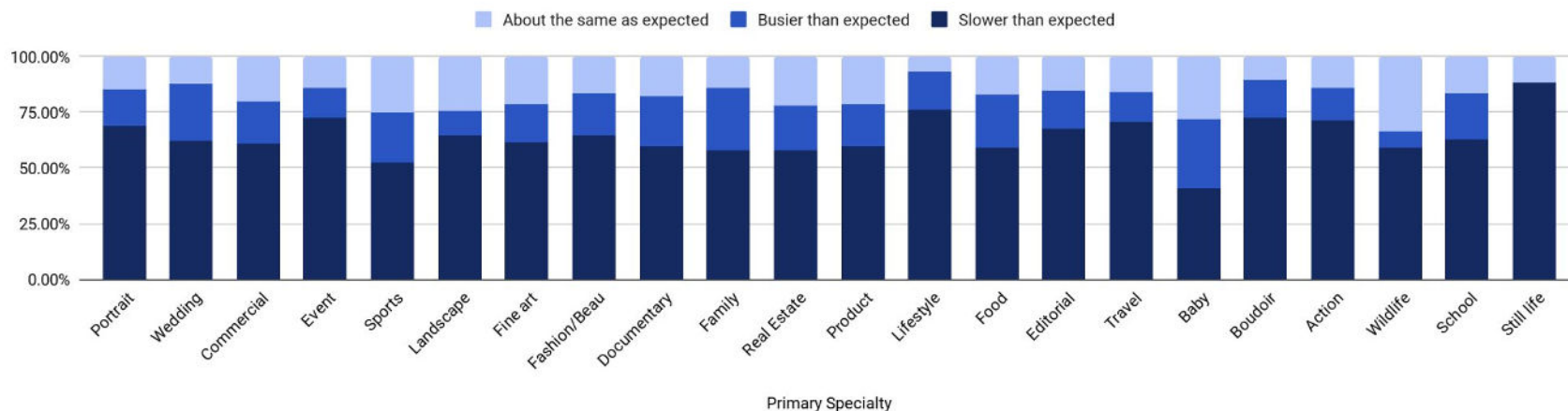


- Slower than expected
- Busier than expected
- About the same as expected

Category Key

COVID IMPACT CONTINUED

Looking back on 2021, how would you characterize your business?

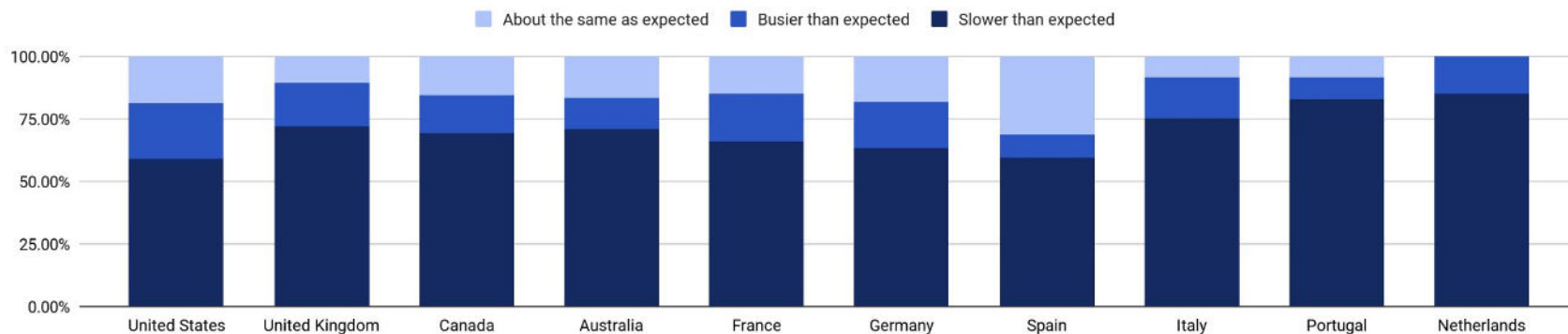


Baby, Family, Sports, Wedding, Documentary, and Food photographers were the busiest in 2021 (pent-up demand?)
Still Life, Event, Lifestyle, Travel, Boudoir, and Action were the busiest in 2021.

COVID IMPACT CONTINUED

By country

Countries with >20 responses

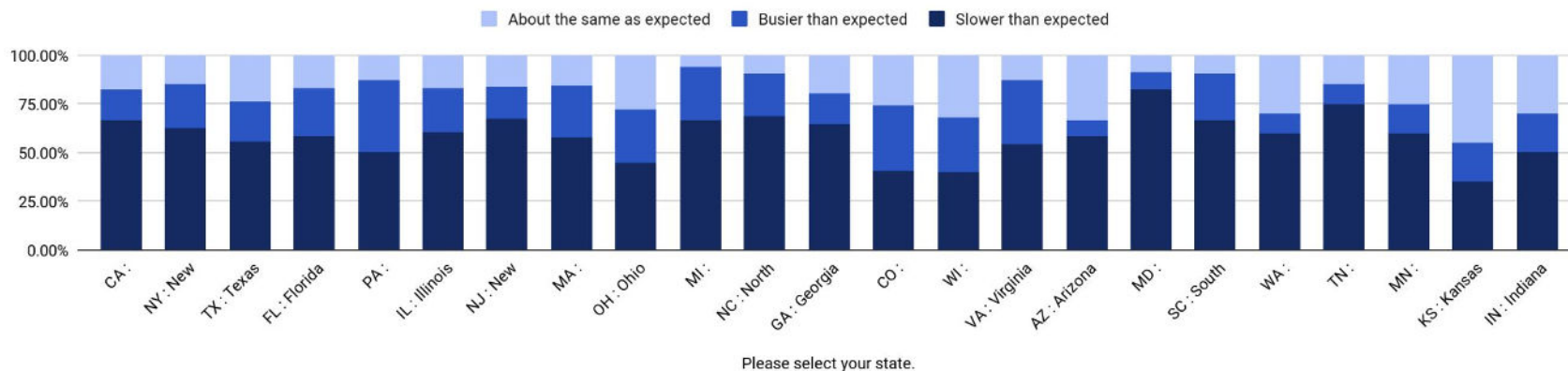


Where are you located? Please select your country.

COVID IMPACT CONTINUED

States in US

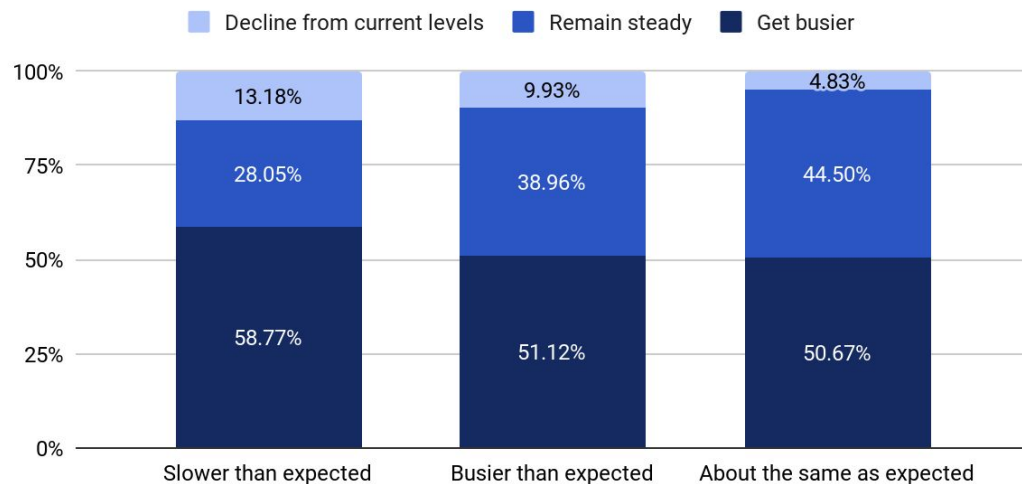
States with >20 responses



In the US, the bright spots were in Pennsylvania, Ohio, Wisconsin, and Kansas. Tennessee, Maryland, North Carolina, and New Jersey lagged behind.

COVID IMPACT CONTINUED

2021 vs Outlook for 2022

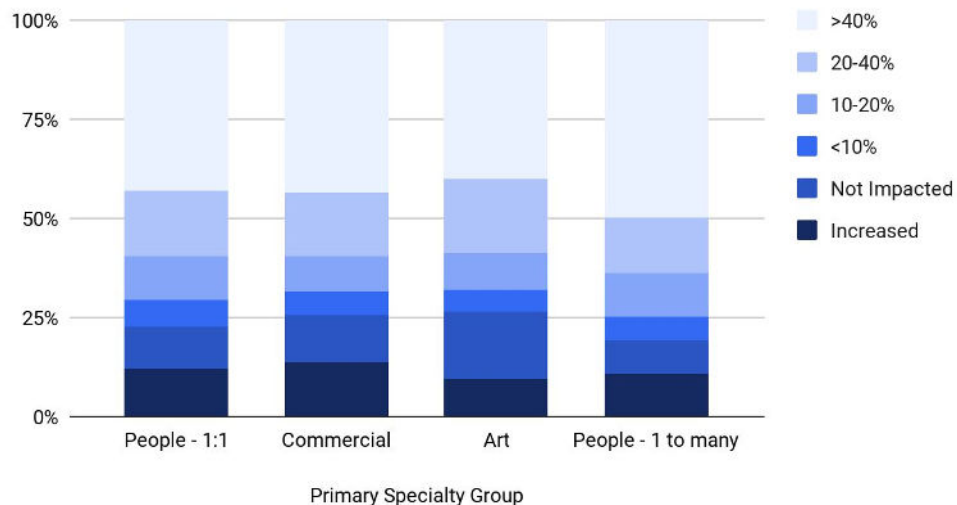


Looking ahead between now and the end of 2022, do you anticipate your business will...

Optimism remains! Over 50% of photographers expect 2022 to get busier, regardless of how 2021 looked for them.

COVID IMPACT CONTINUED

People - 1:1, Commercial, Art and People - 1 to many

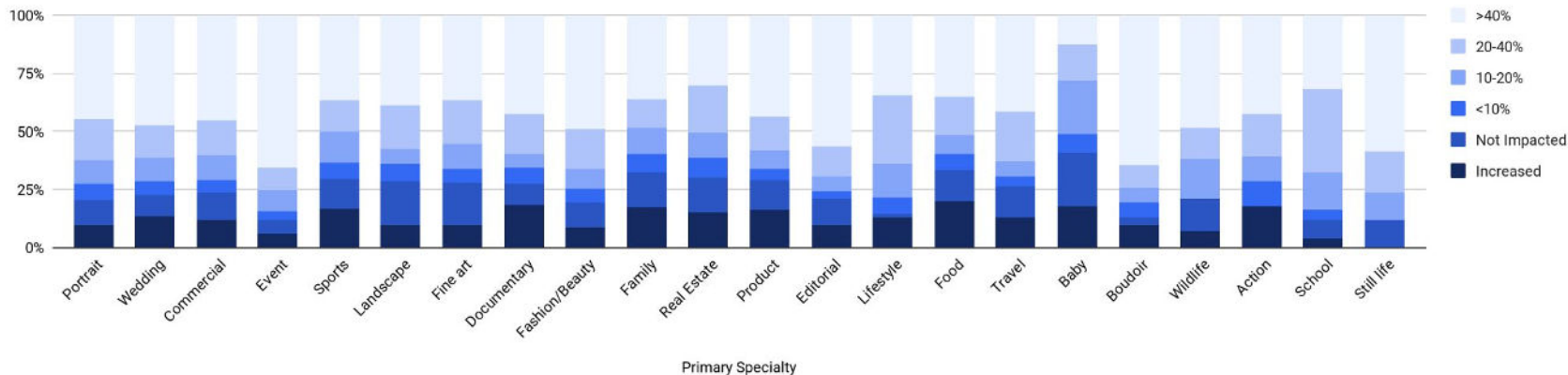


Photographers with primary specialty in the “[People - 1 to many](#)” category were the hardest hit by COVID.

Photographers in the “Art” category experienced the least (but still significant) impact.

COVID IMPACT CONTINUED

Impact by Primary Specialty

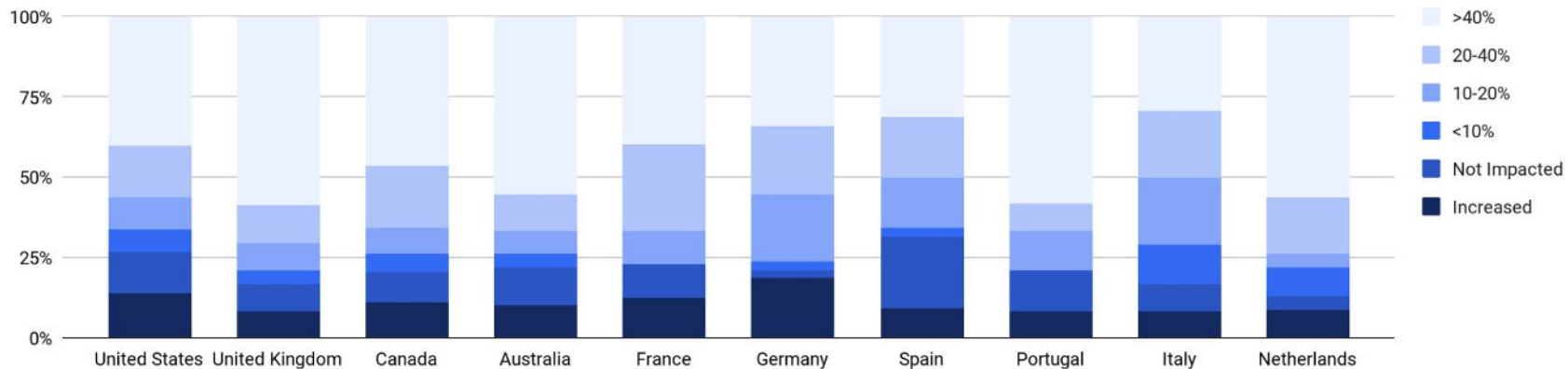


As reported in other charts, Event photographers were hit particularly hard by COVID. Baby, Food, Family, and Real Estate photographers had the most resilience.

COVID IMPACT CONTINUED

Impact by Country

Countries with >20 responses

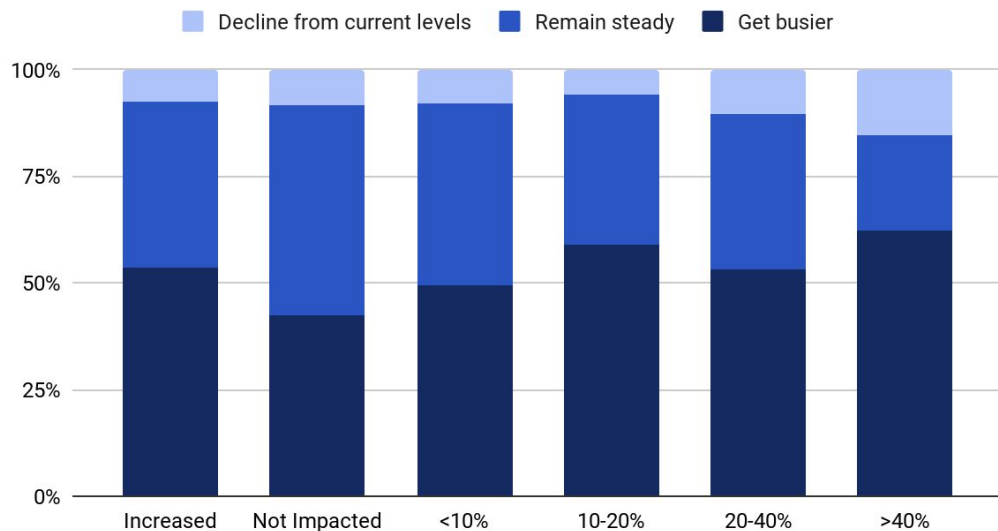


Where are you located? Please select your country.

>50% of photographers in UK, Australia, Portugal, and Netherlands indicated >40% reduction in income due to COVID.
25% of photographers in US and Spain reported no impact

COVID IMPACT CONTINUED

Outlook vs COVID Impact on Revenue

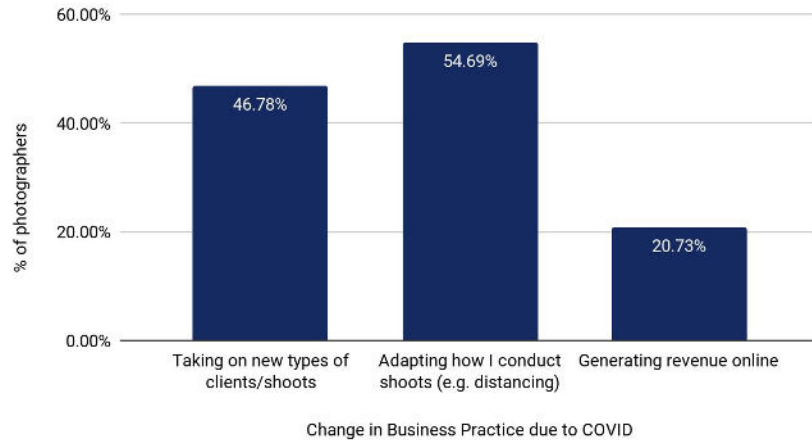


Even those with the biggest impact to revenue due to COVID remain optimistic.

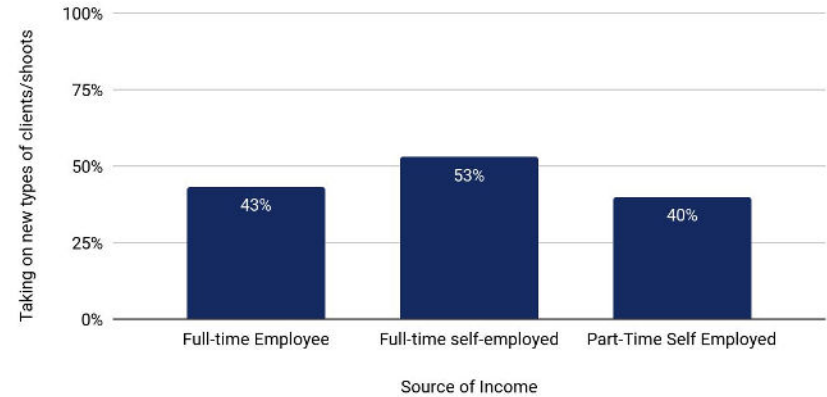
COVID IMPACT CONTINUED

Changes in business practices due to COVID - by employment status

% of Photographers adopting new business practices due to COVID-19



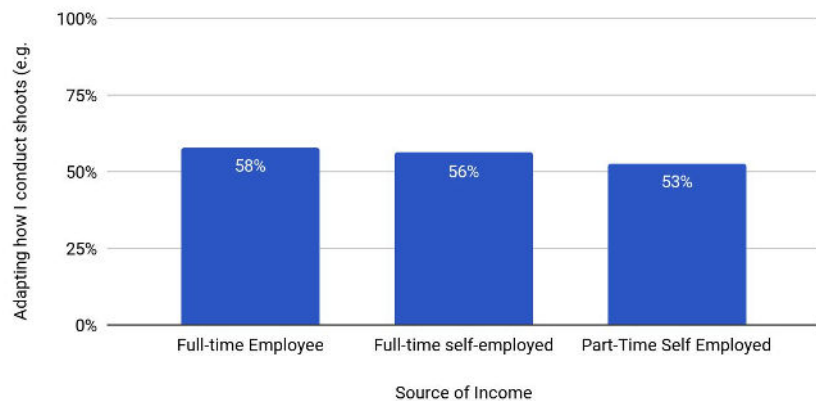
% of photographers who took on new types of clients/shoots due to COVID



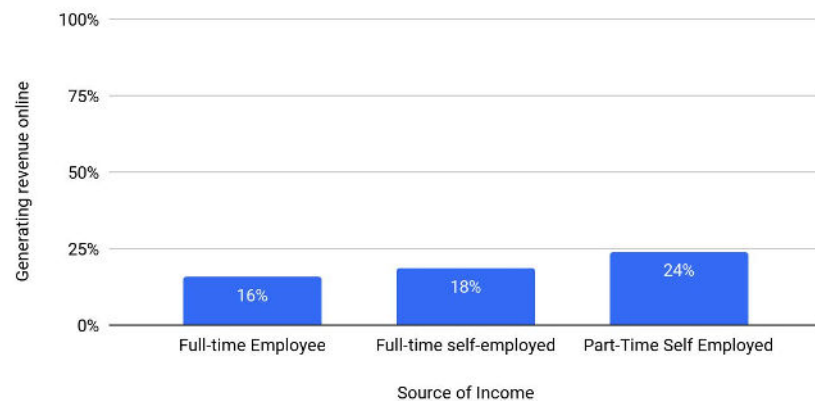
COVID IMPACT CONTINUED

Changes in business practices due to COVID - by employment status

% of photographers who adapted how they conducted shoots (ie distancing) due to COVID



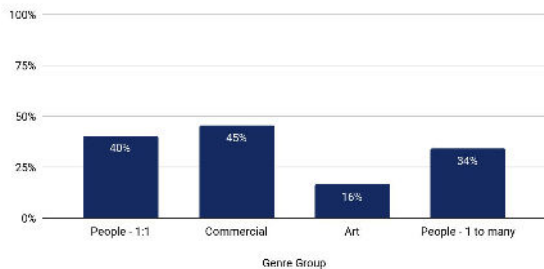
% of photographers who started generating revenue online due to COVID



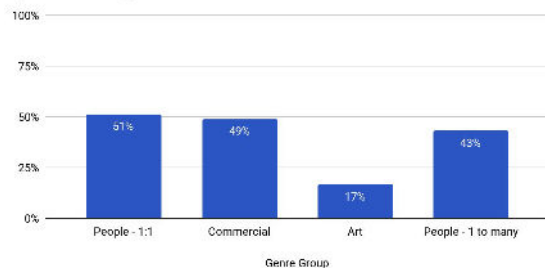
COVID IMPACT CONTINUED

Changes in business practices due to COVID - by specialty group

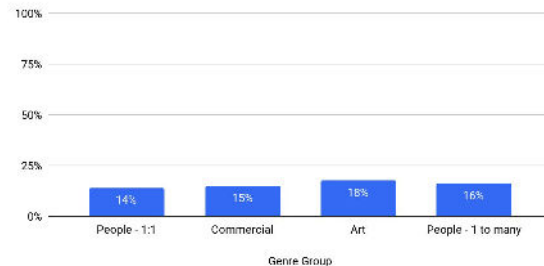
% of photographers who took on new types of clients/shoots due to COVID



% of photographers who adapted how they conducted shoots (ie distancing) due to COVID



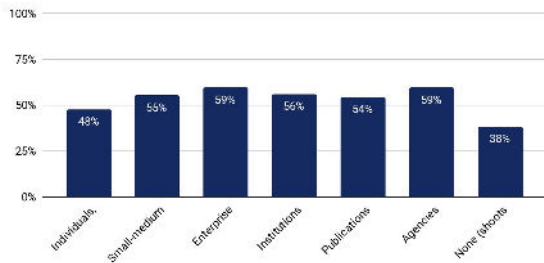
% of photographers who started generating revenue online due to COVID



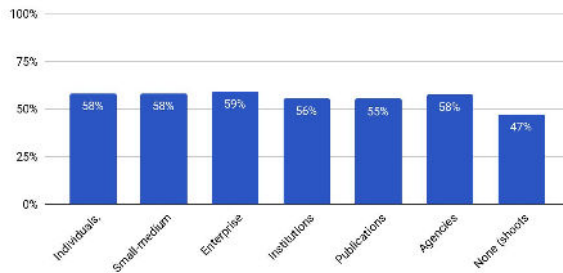
COVID IMPACT CONTINUED

Changes in business practices due to COVID - by client type

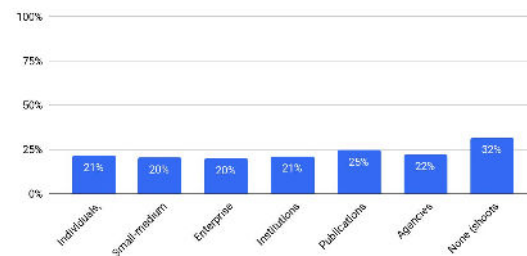
% of photographers who took on new types of clients/shoots due to COVID



% of photographers who adapted how they conducted shoots (ie distancing) due to COVID



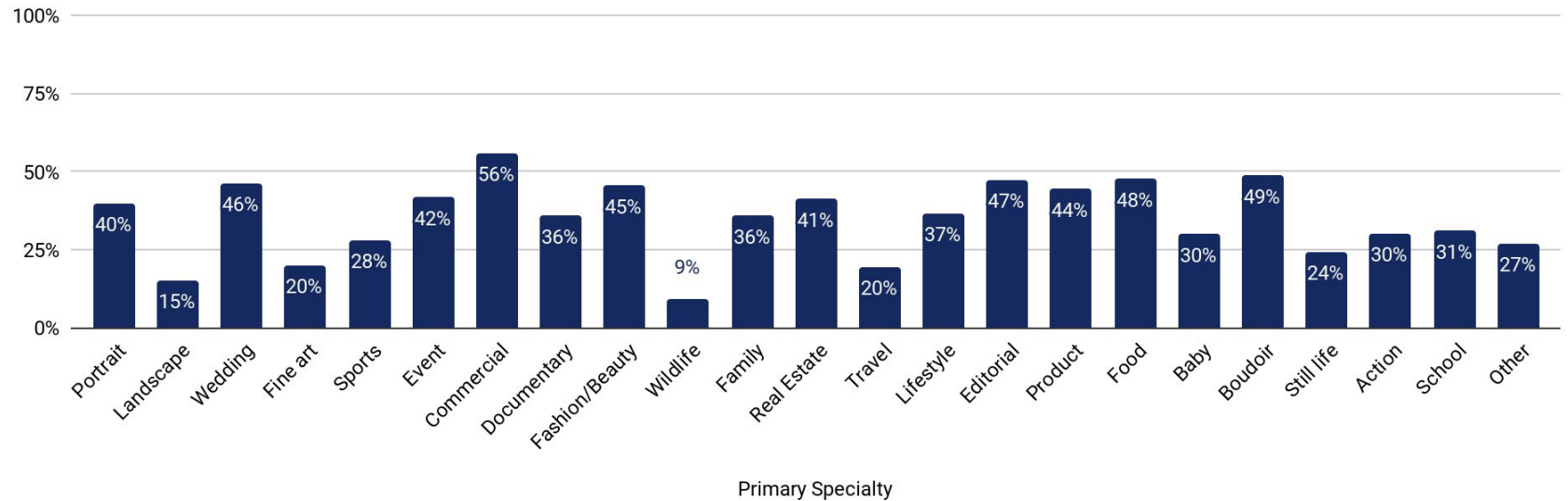
% of photographers who started generating revenue online due to COVID



COVID IMPACT CONTINUED

Changes in business practices due to COVID - by primary specialty

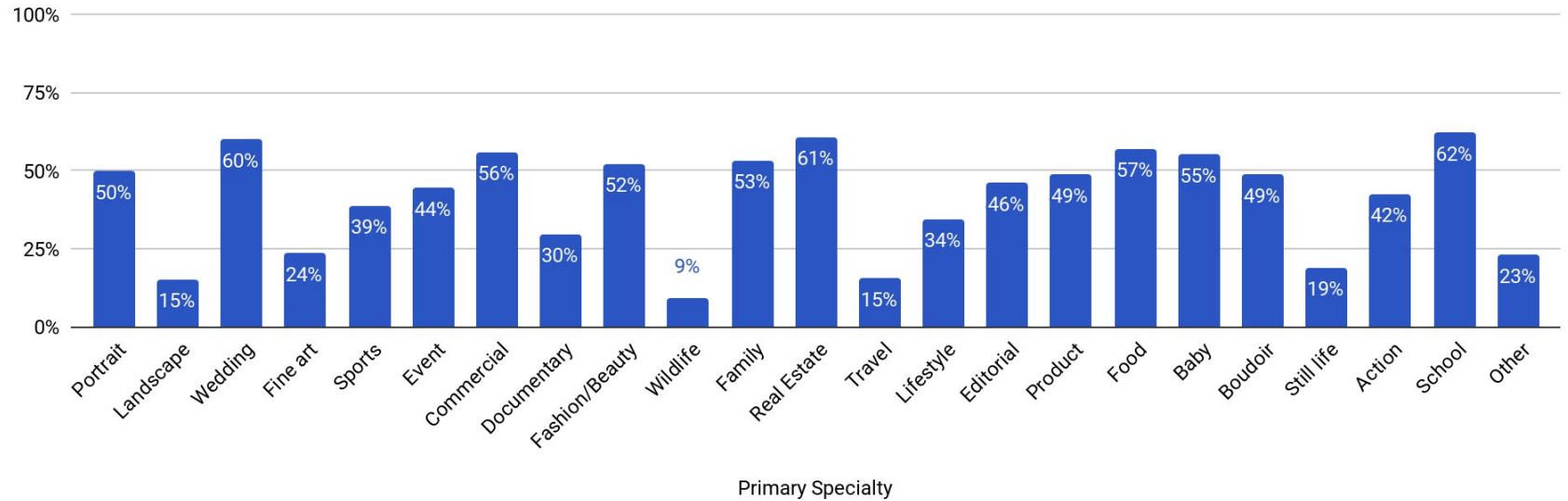
% of photographers who took on new types of clients/shoots due to COVID



COVID IMPACT CONTINUED

Changes in business practices due to COVID - by primary specialty

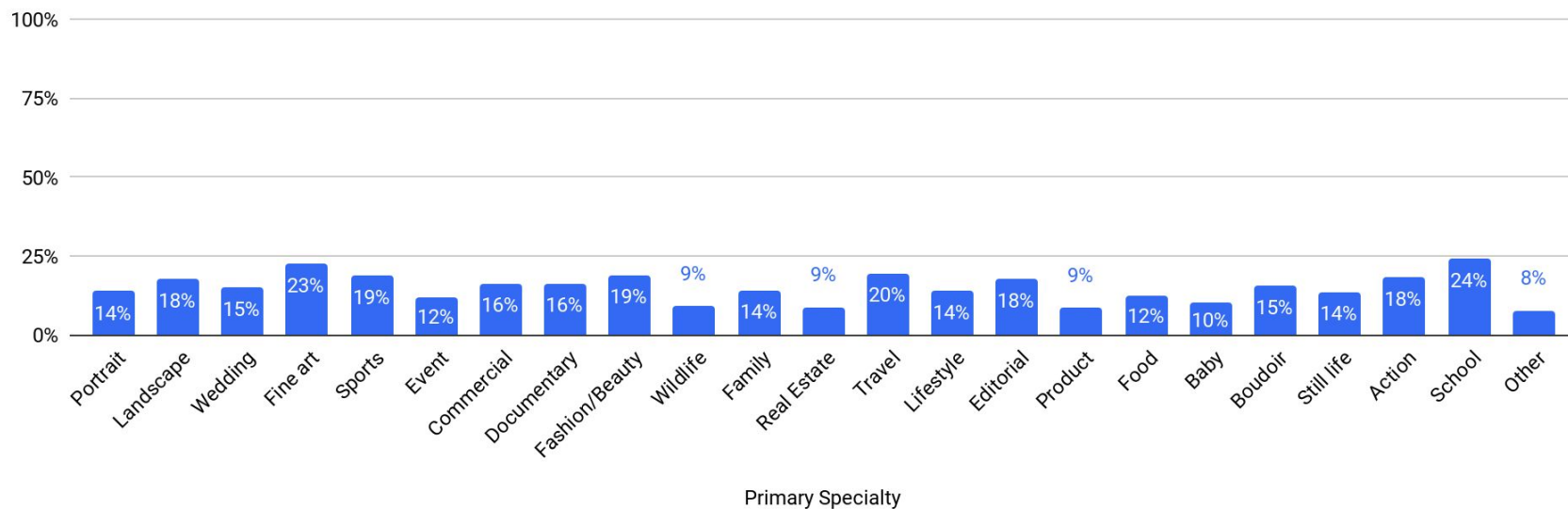
% of photographers who adapted how they conducted shoots (ie distancing) due to COVID



COVID IMPACT CONTINUED

Changes in business practices due to COVID - by primary specialty

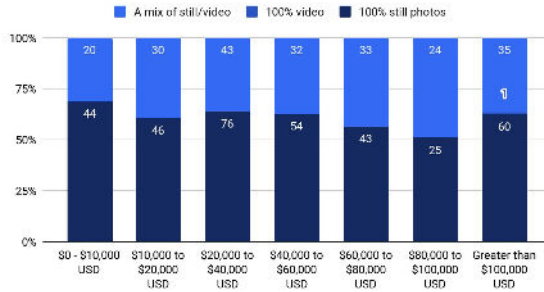
% of photographers who started generating revenue online due to COVID



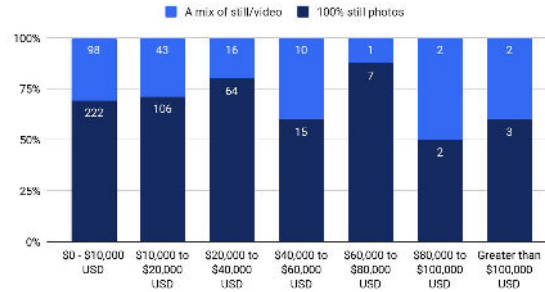
Income

US, by employment status

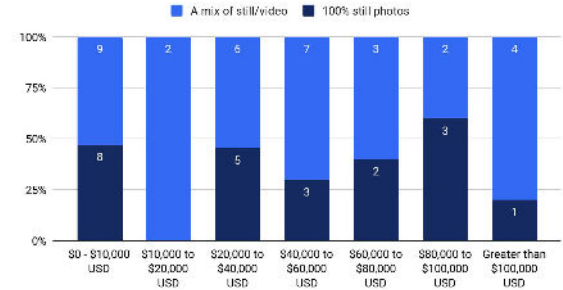
Annual Income, Full-time Self-Employed



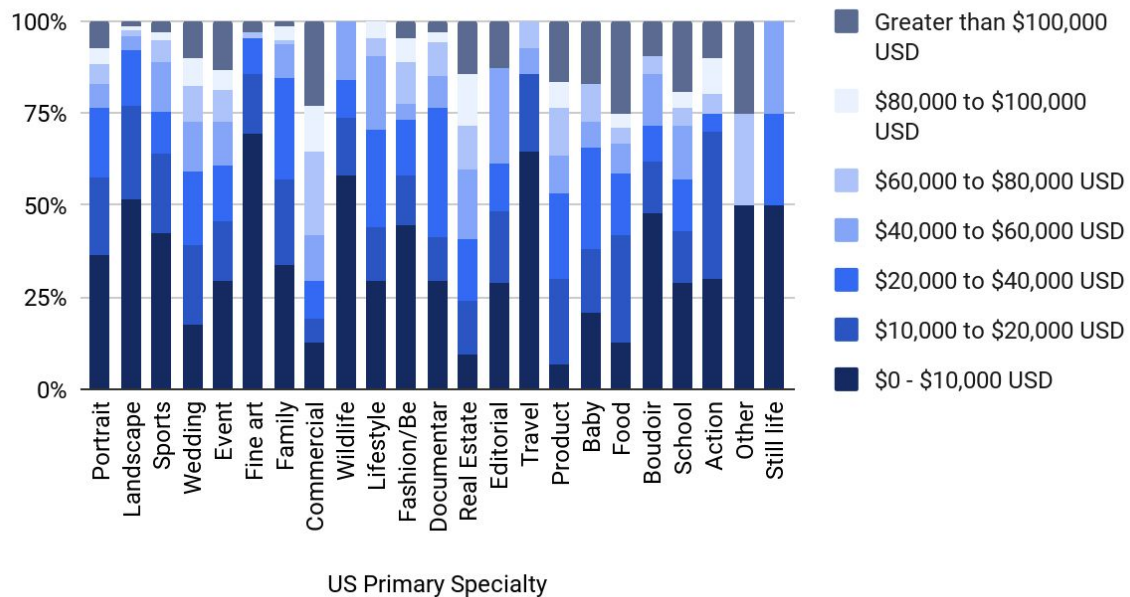
Annual Income, Part-Time Self-Employed



Annual Income - Full-Time Employed



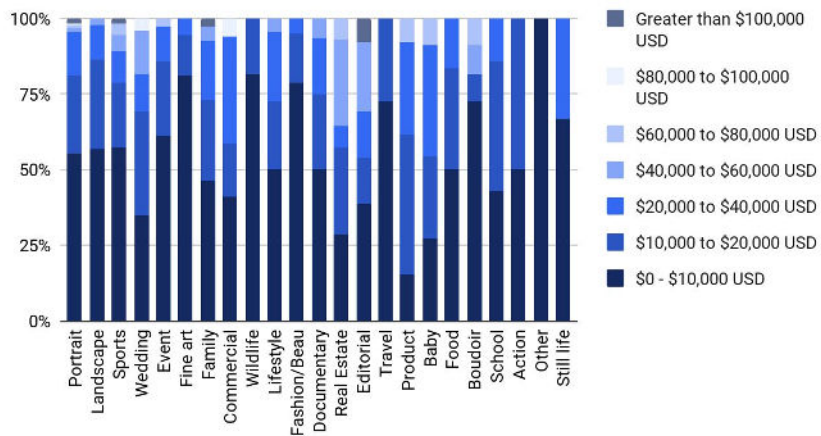
US By Specialty



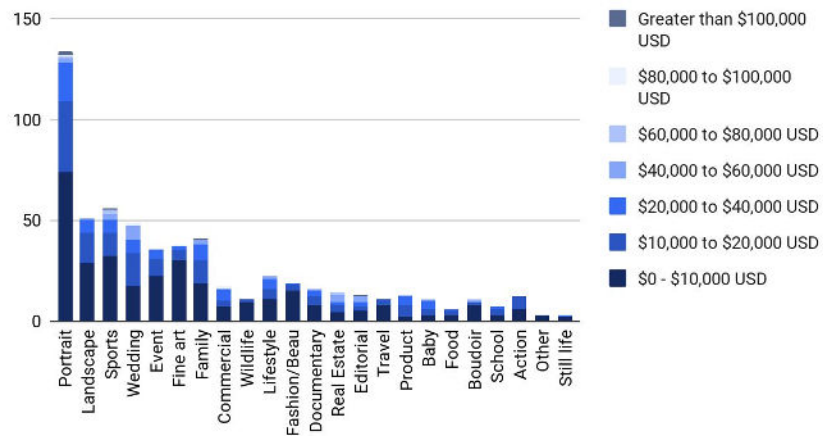
INCOME CONTINUED

US, by primary specialty — part-time, self-employed

Part-Time Self-Employed



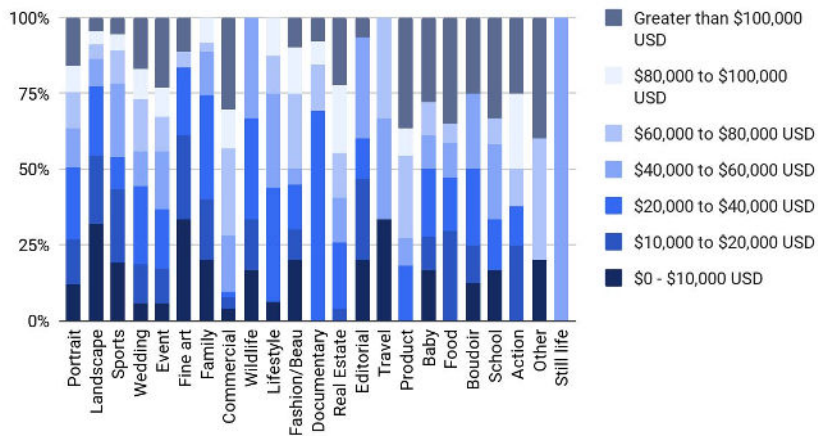
Part-Time Self-Employed



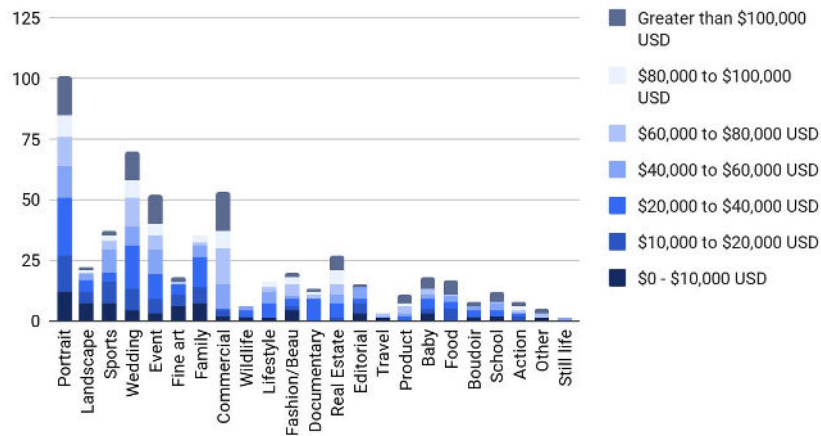
INCOME CONTINUED

US, by primary specialty — full-time, self-employed

US Full-Time Self-Employed



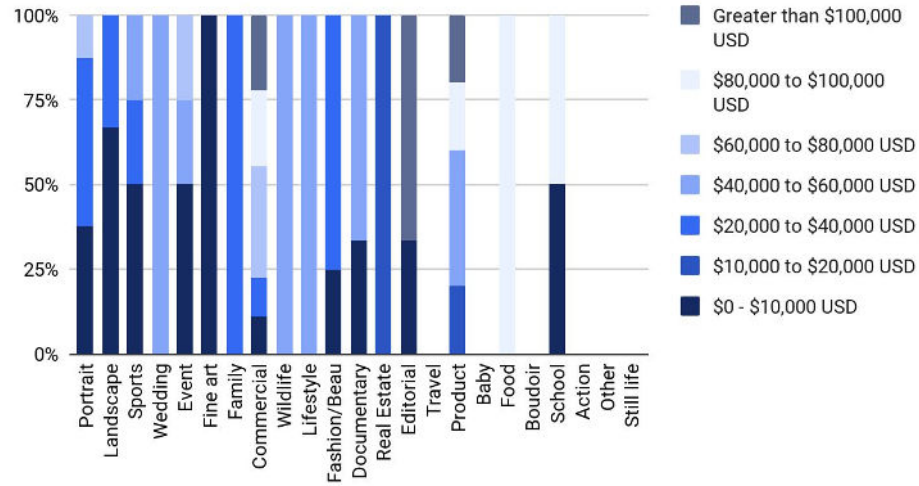
US Full-Time Self-Employed



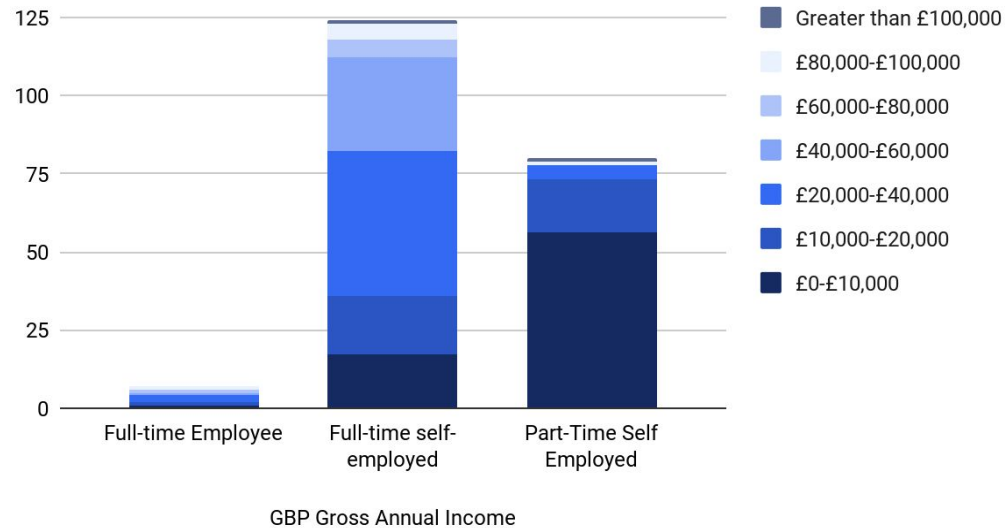
INCOME CONTINUED

US, by primary specialty — full-time employees

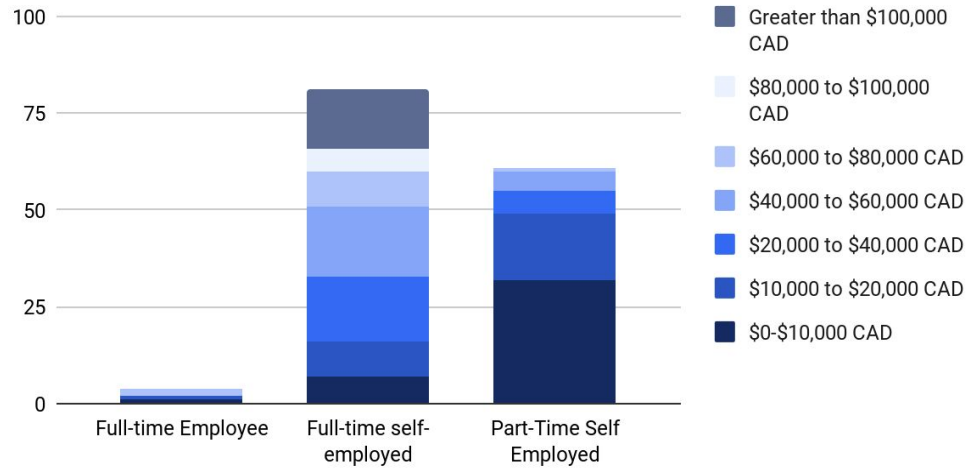
US Full-Time Employees



UK Income by Employment Status



Canada by Employment Status



CAD What is your gross annual income from all types of photography

Categorization of primary specialties

People - 1:1
1:1 relationship with primary subject
Portrait
Family
Lifestyle
Boudoir
Baby
Wedding

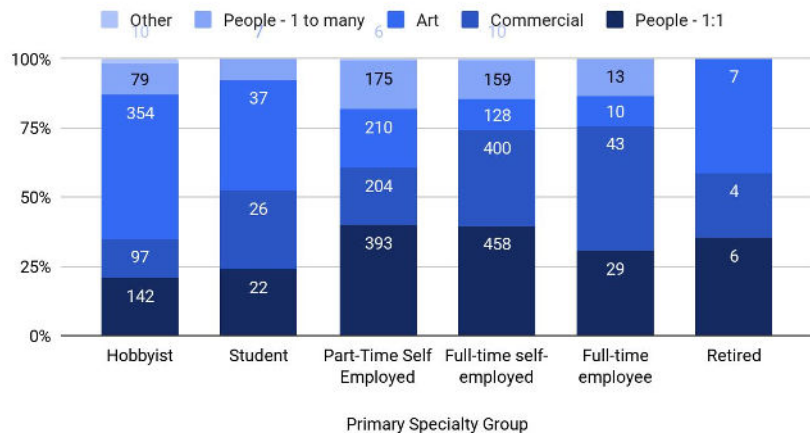
Commercial
photograph people or things for a commercial output
Commercial
Documentary
Real Estate
Product
Editorial
Food
Fashion/Beauty

Art
photograph places or things for an artistic output
Landscape
Fine art
Wildlife
Travel
Still life

People - 1-to-many
1-to-many relationship with primary subject
Sports
Event
School
Action

INCOME CONTINUED

Primary Genre Group by Working Status



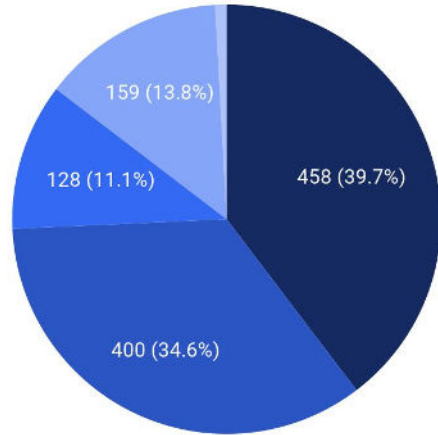
The more a photographer relies on their income, the less their primary genre falls into the “Art” category.

Full-time photographers are most likely to work primarily in “Commercial” genres, whether they are self-employed, or are an employee.

Self-employed photographers are most likely to focus on clients with a 1:1 relationship - whether they are full-time or part-time.

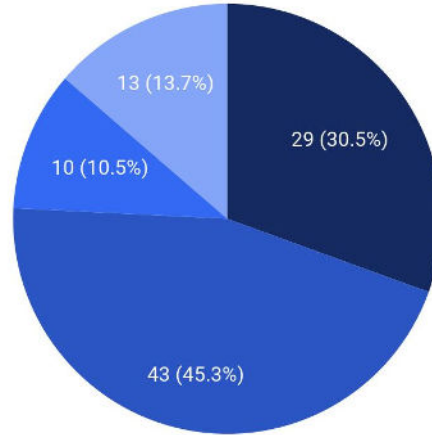
INCOME CONTINUED

Full-time self-employed



- People - 1:1
- Commercial
- Art
- People - 1 to many
- Other

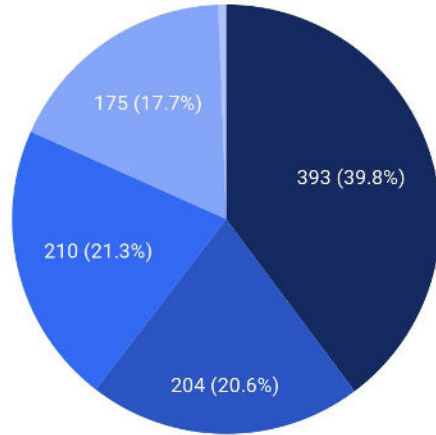
Full-time Employee



- People - 1:1
- Commercial
- Art
- People - 1 to many

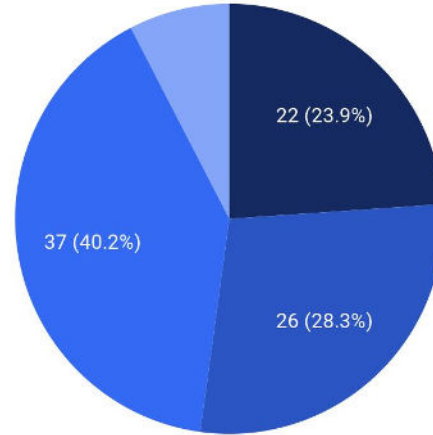
INCOME CONTINUED

Part-Time Self Employed



- People - 1:1
- Commercial
- Art
- People - 1 to many
- Other

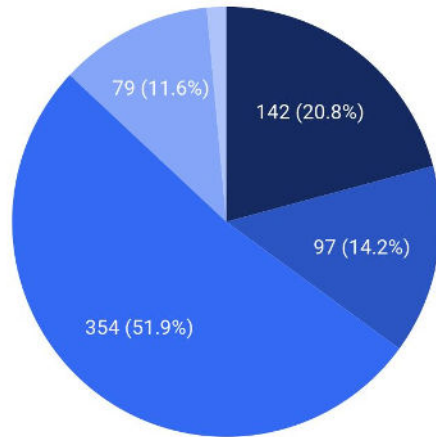
Student



- People - 1:1
- Commercial
- Art
- People - 1 to many

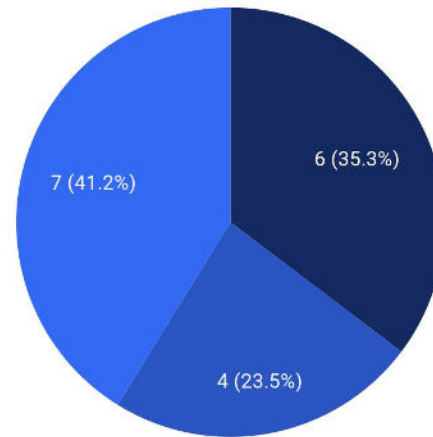
INCOME CONTINUED

Hobbyist



- People - 1:1
- Commercial
- Art
- People - 1 to many
- Other

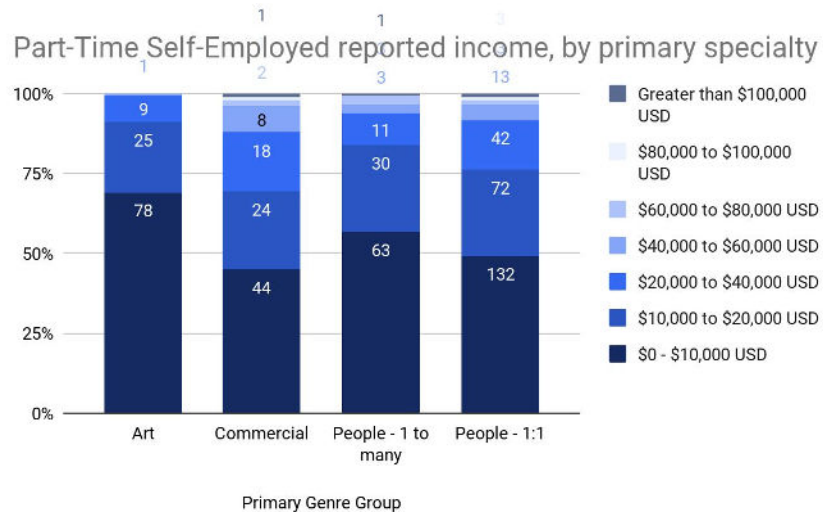
Retired



- People - 1:1
- Commercial
- Art

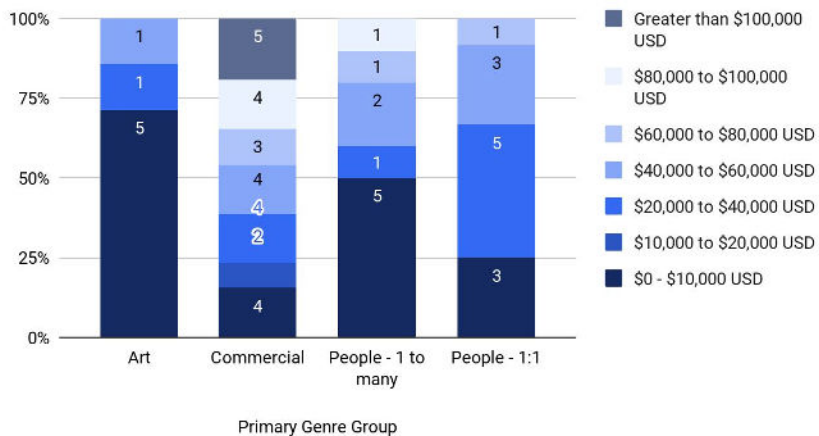
INCOME CONTINUED

Whether a photographer is part-time or full-time, and whether they work for themselves or an employer, the greatest earning potential resides firmly in the “Commercial” genres. Those focusing on “Art” have the lowest earning potential.

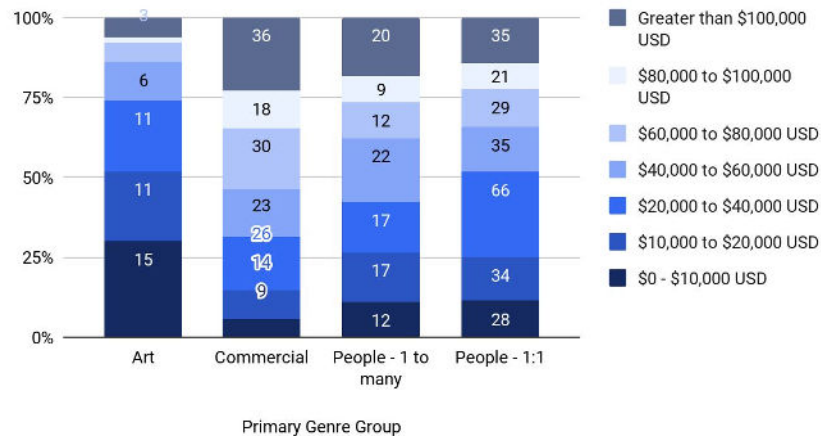


INCOME CONTINUED

Full-Time Employee reported income, by primary specialty



Full-Time Self-Employed reported income, by primary specialty



Conclusion

Similar to the experiences of most businesses over the past two years, the photography industry was not immune to adverse repercussions and operational challenges. However, when considering “fight or flight” responses, photographers as a whole showed resilience by adapting and sticking with the craft and commerce they love.

Now that typical events benefiting from photography are filling up family, school, and business calendars with reunions, celebrations, conferences, school & sports activities – hopefully photographers will benefit from a robust rebound in 2022. Zenfolio and Format will be monitoring photography industry trends, asking questions, and revealing the results in the next survey.