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VisualGPS

Building Trust in the Age of AI



About VisualGPS

The power of visuals to connect with consumers and drive them to action is undeniable. With media consumption constantly evolving, having the right creative mix has become more complex—and never more critical. Building on our visual experts' decades of creative leadership and guidance, VisualGPS shares our expertise widely, providing timely insights on industries, regions, and demographics to brands, marketers, and creatives. Through this exclusive data-backed research and reporting, we provide ongoing updates on the shifts in consumer sentiment, customer usage, and the visual landscape—enabling you to tell stories in an authentic, impactful way.

Our Methodology: A Holistic Approach

Cutting to the core of how today's consumers think and feel, our unique synthesis of qualitative and quantitative research helps us develop a deep understanding of contemporary consumer preferences and needs.

DEEP CONSUMER INSIGHTS

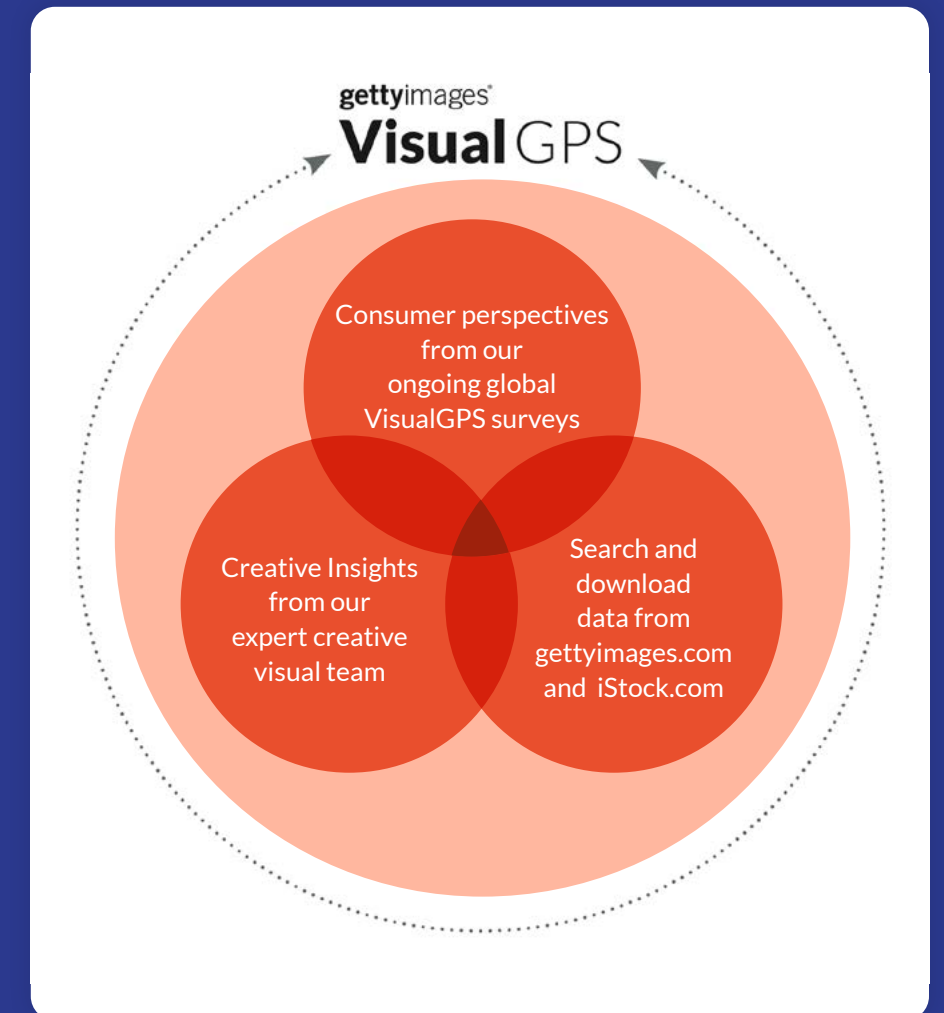
Partnering with a world-class global research firm, Marketcast, VisualGPS conducts extensive and ongoing consumer research to track shifts in consumer needs. Our surveys cover diverse topics, exploring attitudes, behaviors, and preferences across various concepts.

CREATIVE EXPERTISE AND ANALYSIS

Our award-winning creative team brings nearly 30 years of experience in visual trend analysis and guidance, informing both Getty Images content creators and customers on what connects with consumers.

SEARCH AND DOWNLOAD DATA

With access to a staggering 2.8 billion annual searches and insights derived from millions of images and videos licensed by nearly one million global customers, VisualGPS provides both macro and micro-level perspectives on content usage across diverse mediums, subjects, and industry sectors.



VisualGPS by the Numbers



60+
Visual Experts providing ongoing visual analysis and guidance


Q Access to 2.8 billion searches annually



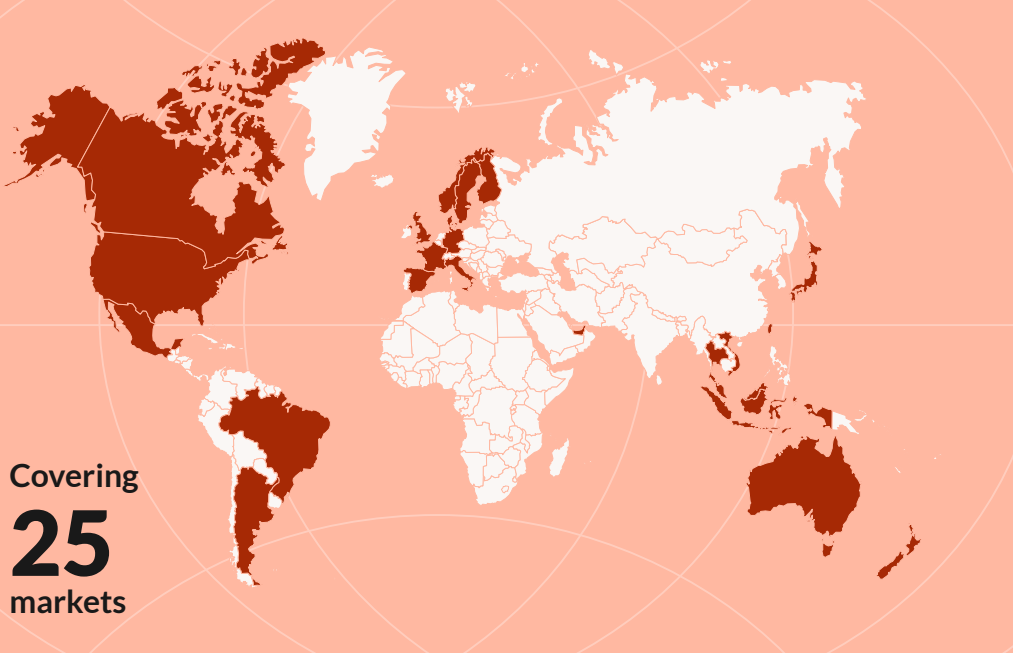
12+
surveys conducted over 5 years



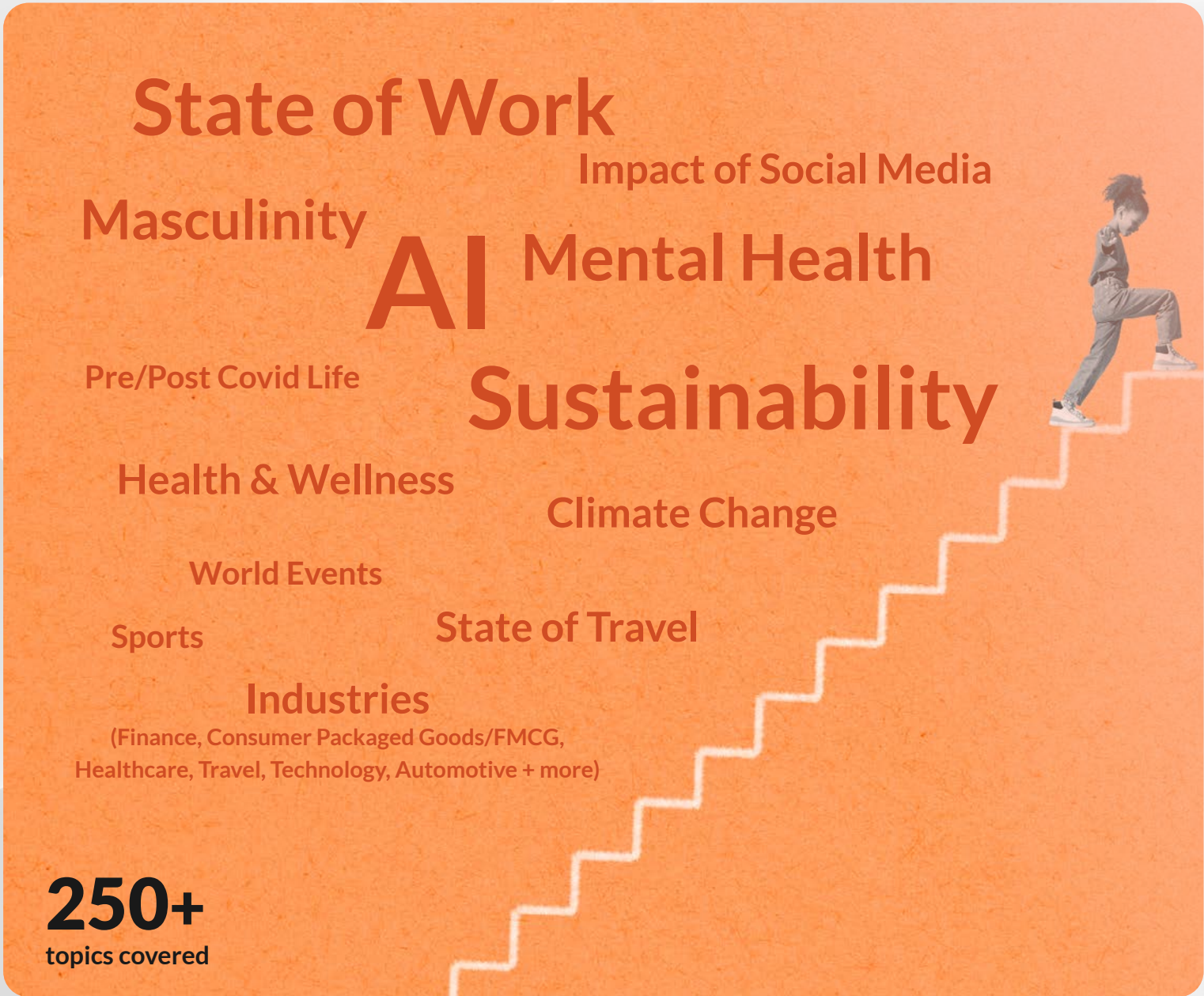
90,000+
Respondents



Insights from millions of licensed images and videos, reflecting global business and marketing trends



Covering **25** markets



State of Work
Impact of Social Media
Masculinity
AI Mental Health
Pre/Post Covid Life
Sustainability
Health & Wellness
Climate Change
World Events
Sports
State of Travel
Industries
(Finance, Consumer Packaged Goods/FMCG, Healthcare, Travel, Technology, Automotive + more)
250+
topics covered

All data in this report, unless otherwise noted was collected from VisualsGPS global consumer surveys from 2022-2024. Survey samples included adults aged 18 and above, with a sample size of 7,500 per survey.

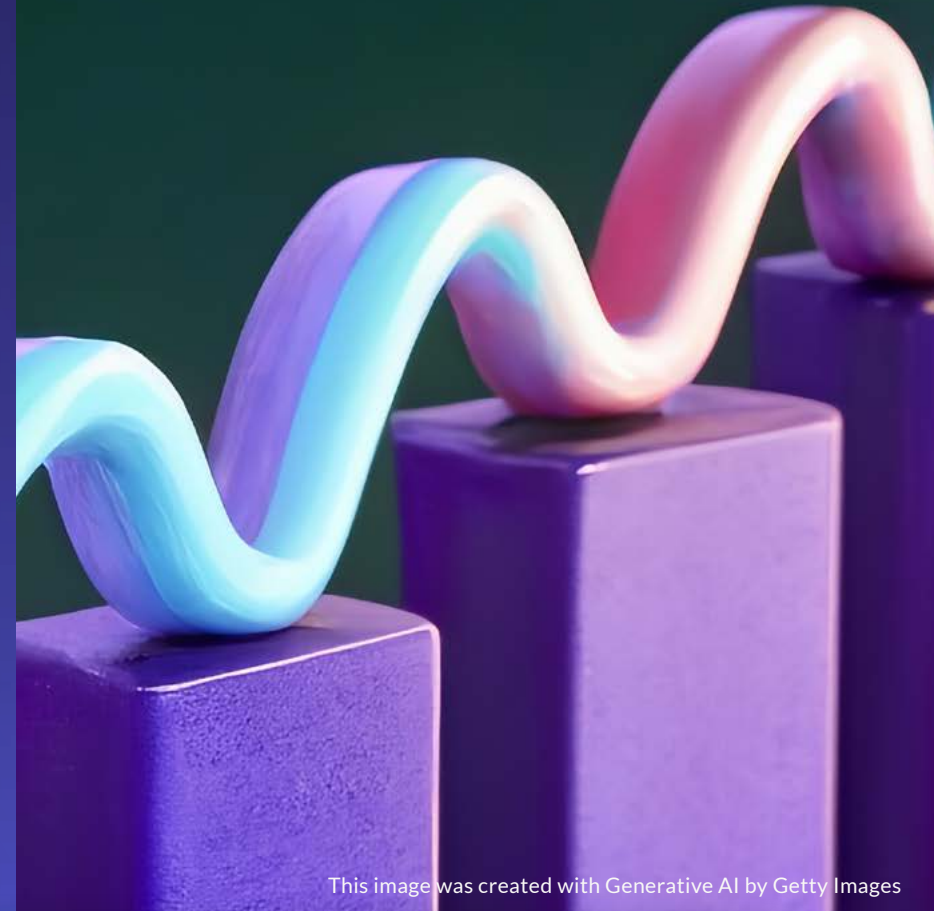
From The Editor

THERE'S NO GOING BACK

Remember when AI was just a cool concept in sci-fi movies? Well, fast forward to today, and it's everywhere, making its grand entrance with authority, shaking things up in every corner of the world, disrupting nearly every industry, in every region, and across every medium—and nothing will ever be the same again!

Or so the doomsayers would have you believe. Seriously though, can you think of any other innovation that's sparked such a wild mix of creativity and existential dread? The Industrial Revolution took a century to overhaul manufacturing, social media blew up in a couple of decades, and now AI is flipping the script in a matter of months. As they say, "that escalated quickly" and it's showing no signs of slowing down.

Let's be clear—it's not all fear and doomsaying. While Generative AI isn't exactly new, its recent explosion of accessibility is, which is why it's important to understand how today's consumers feel about it. With AI, the creative process is becoming more accessible to more people, and that's a game-changer. From boosting productivity to enhancing transparency and sparking societal shifts, what these advances mean for marketers, creatives, and visual professionals has yet to be fully realized.



This image was created with Generative AI by Getty Images

So...should you be using generative AI content? And if yes, when—and how—should you be using it?

You, no doubt, want to know what an AI-powered future holds for your brand, its visual identity, and how to manage it in a world that's constantly questioning what it means to be real. It's understandable if treading lightly is where you find yourself right now. Generative AI content is challenging the trust and relationships brands have built with consumers. With 98% of consumers agreeing that "authentic" images and videos are pivotal in establishing trust, getting AI right is imperative for your brand's future success. We're here with our decades of experience and data-backed insights to help you dive in... so sit tight.

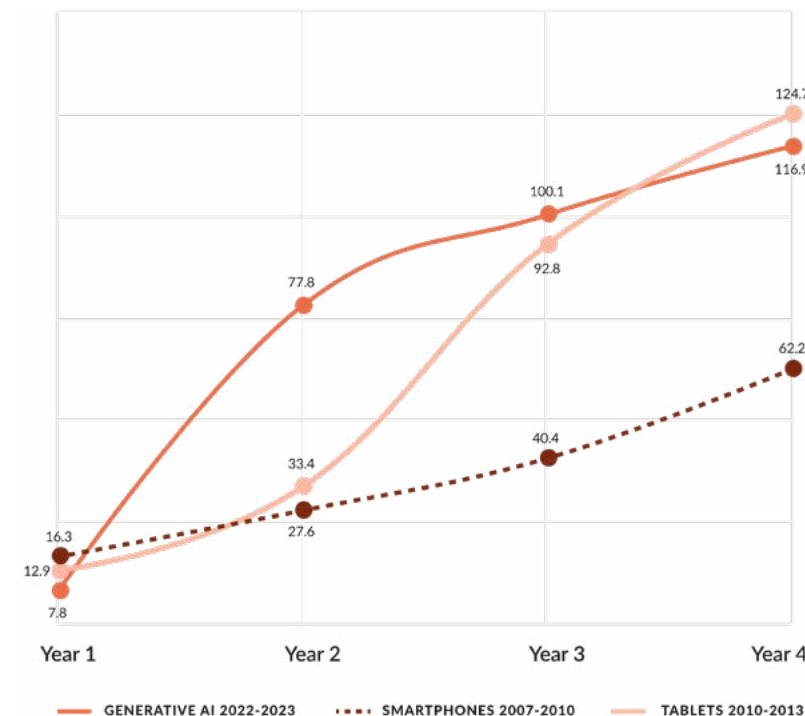
AI is a powerful tool, but it's just one option. The possibilities that AI creates are practically endless. But is it always the right tool? Beyond aesthetics, you need to make sure you're mitigating risk by using it responsibly, respecting intellectual property rights, and meeting consumer expectations—all variables that seem to be changing at a breakneck speed. There's no doubt that getting it right when it comes to adoption of AI is going to be tricky. And later in this report, we'll take a look at the risks and rewards for brands considering generative AI content, when to use it, and when not to.

Hang on tight folks, the AI evolution is just getting started—and we're here with the actionable insights you need to navigate this sometimes scary, but exciting-as-heck future.



Dr. Rebecca Swift
Senior Vice President, Creative

Generative AI has a Steeper Initial Adoption Curve than Other Recent Technologies (millions of US users)



Note: Individuals of any age who use each technology at least once per month; Year 1 for smartphones corresponds with the June 2007 release of the iPhone; Year 1 for tablets corresponds with the April 2010 release of the iPad; Year 1 of generative AI corresponds with the November 2022 release of ChatGPT

Source: Insider Intelligence, June 2023

Q AI-related searches 2023

+239% Q AI

For the first time ever, AI appeared in the top 5 customer searches for the year. Other searches related to the Generative AI boom have also risen considerably, underscoring the excitement:

+11,855% Q Chat GPT

+13% Q Machine Learning

+11% Q Neural Network

Getty Images proprietary search database (2023)

What Global Consumers Care About

As the introduction of AI into their daily lives continues to evolve, so do the attitudes consumers have towards it. Brands looking to adopt generative AI into their marketing and creative mix need to understand what today's consumers think and feel about this emerging technology. To do so means knowing how AI has been represented, how that effects perceptions, and what you can do to normalize its use through your choice of images.

WHERE WE'VE BEEN

Over the past few years, the perception of AI has changed considerably, reflecting the dynamic interplay between technological progress, consumer preferences, and societal sensitivities. As we've noted, AI has stirred the imagination for decades, and as its presence has become more pronounced in our everyday—from the algorithms that power our social platforms to the tracking we can do with our personal spending—the urgent need to understand its influence on our lives has only accelerated.

Fast forward to 2023, when generative AI was placed in the hands of the public for the first time. We're challenged, yet again, to reckon with a growing interest and the implications of this technology.

WHERE WE'RE GOING

The fast-moving pace of innovation in AI of all forms has also been met with a growing chorus of concerns from a variety of different sectors: from international calls to pause AI research to work stoppages in the US film and television industries to consumers themselves expressing fears of the ways AI can be used for harm.

But there's much more consumer ambivalence about a future with AI as a superpower than most realize. In fact, challenging the assumption that consumers don't care, the past year has seen an increase from 57% to 63% regarding their concerns about how AI images and videos are made.



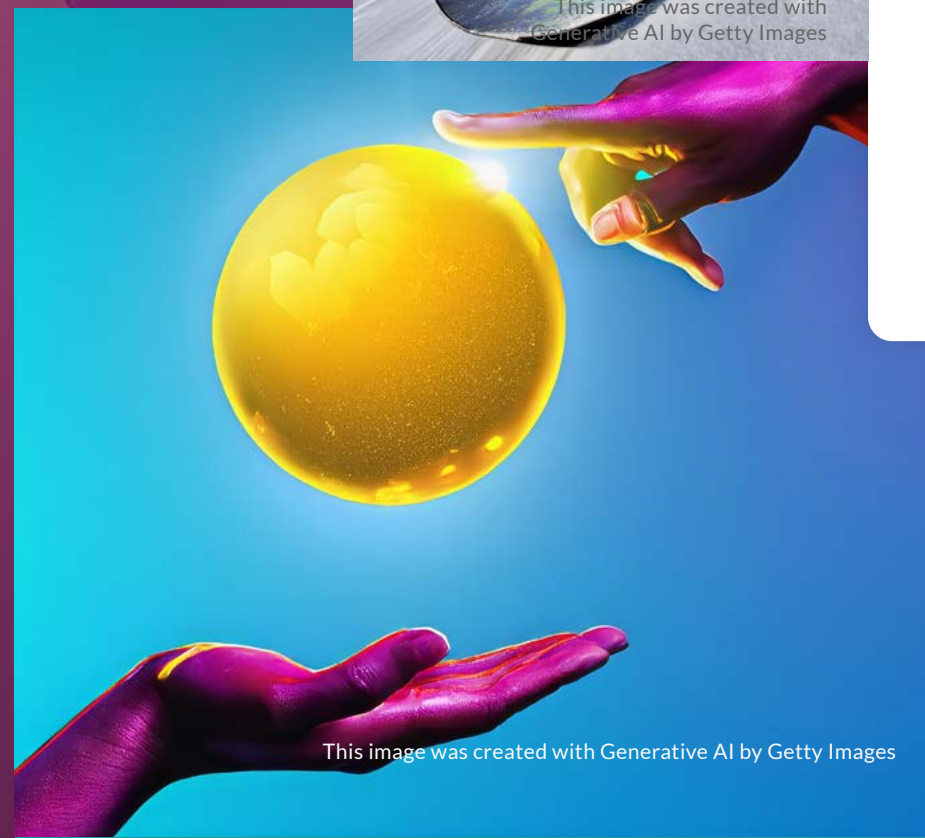
Framing a visual narrative around AI can be a challenge. Get insights on how to visually represent AI and other complex topics at [VisualGPS.com](https://www.visualgps.com)




AI is Unsettling to Many, Embraced by Younger Generation

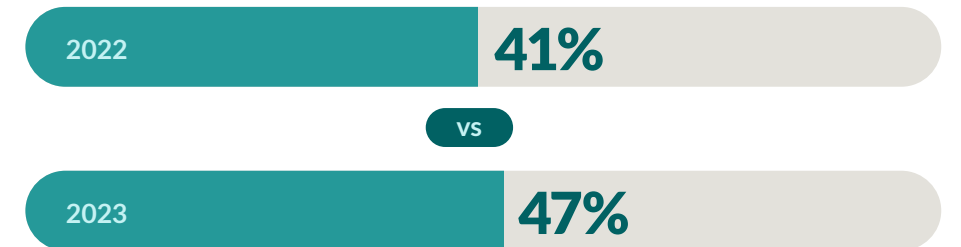
With technology feeling more overwhelming than ever, people are more nervous about the future, especially when it comes to our increasing reliance on technology and the advancement of AI. In fact, nearly half (47%; up from 41% in 2022) of people around the world are nervous about AI with elevated worries in Western society where understanding and interest in this emerging tech are lower than emerging markets.

However, there's generational nuance when it comes to brands using AI-generated images. Younger people, especially younger males, are more open to the idea of AI-generated images being incorporated into brand communications, likely because they are also more familiar with and interested in AI technology and its perceived benefits.

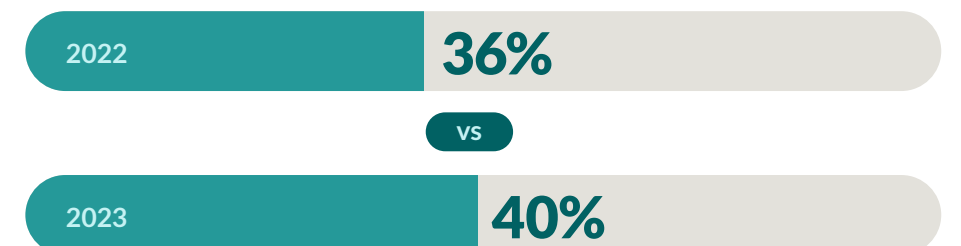


 Nerves about tech are on the rise, increasing at a faster pace than general anxiety about the future

I feel overwhelmed by all the technology available to me



I am nervous about how heavily the world will rely on technology in the future



REGIONAL FOCUS

Excitement and Anxiety



In regions like Japan, concerns primarily revolve around potential job displacement and the spread of misinformation

1359993111, Taiyou Nomachi



ASIA-PACIFIC

In 2023, the public's perception of AI in Asia Pacific was mixed, there was huge interest in the potential of AI whilst also being cautiously optimistic and apprehensive. This is still the case in 2024.

74%
of Southeast Asian markets
see how AI could benefit their life

vs

57%
of global markets
see how AI could benefit their life

80% of Asia Pacific region is aligned in how AI technology is capable of enhancing productivity





This image was created with Generative AI by Getty Images

EUROPE

European anxiety levels about technology have been slightly outpacing the global average. Countries like the UK and France stand out as the most anxious about AI, while Germany shows more excitement, presenting a unique challenge for the visual representation of this powerful technology. This signals the need to show a delicate balancing act between enthusiasm and apprehension.

“AI makes me very nervous”



with local differences



“I am excited about AI technology”



with local differences



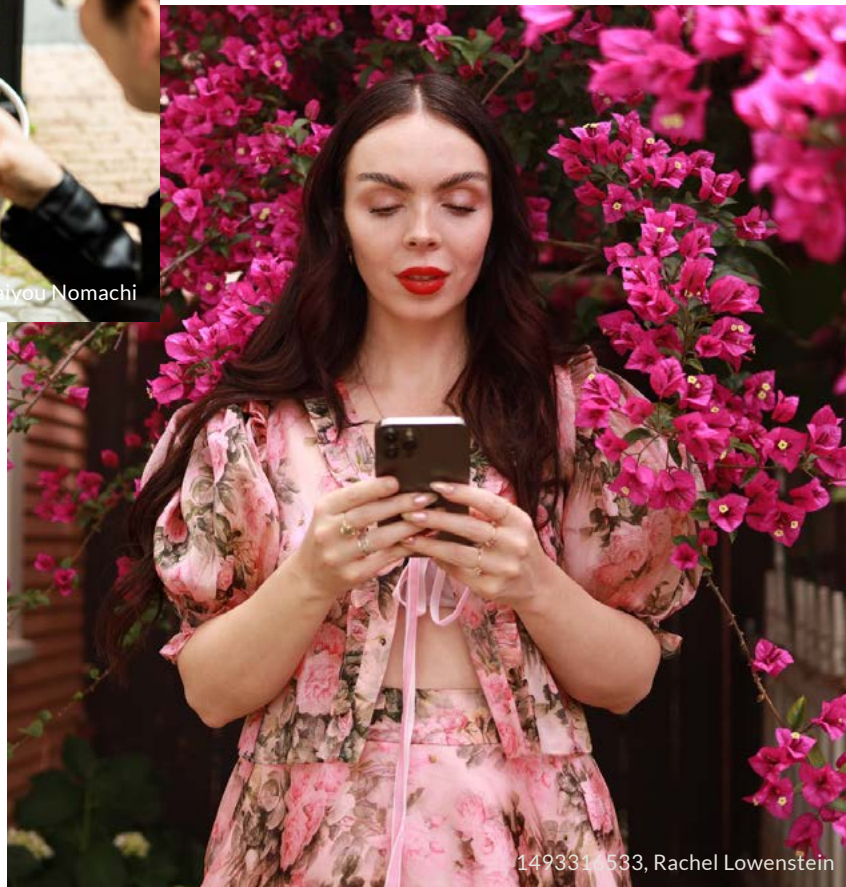
Using AI Generated Images: It's a Matter of Trust

As if it weren't already hard enough to determine what's real and what's not on social media, here comes AI to make it even harder. And as we continue to understand the effects of social media on the young, old, and society at large, brands need to be acutely aware of the trust factor.

98% of consumers agree that 'authentic' images and videos are pivotal in establishing trust—getting AI right is imperative for your brand's future success.



1419555606, Taiyou Nomachi



1493311533, Rachel Lowenstein



637469175, Stephen Zeigler

FAKES COULD BE FEEDING THE FEAR

It was only 10 years ago that social media was seen as a source of real content. It felt more authentic and unposed than what was available in the mainstream media, but things have changed in the interim period.

82% of global respondents now agree that "social media can't be trusted to be real or accurate."

This shift in opinion has come about because of the prevalence of faked imagery, either through the use of clever angles or heavy retouching and filtering.

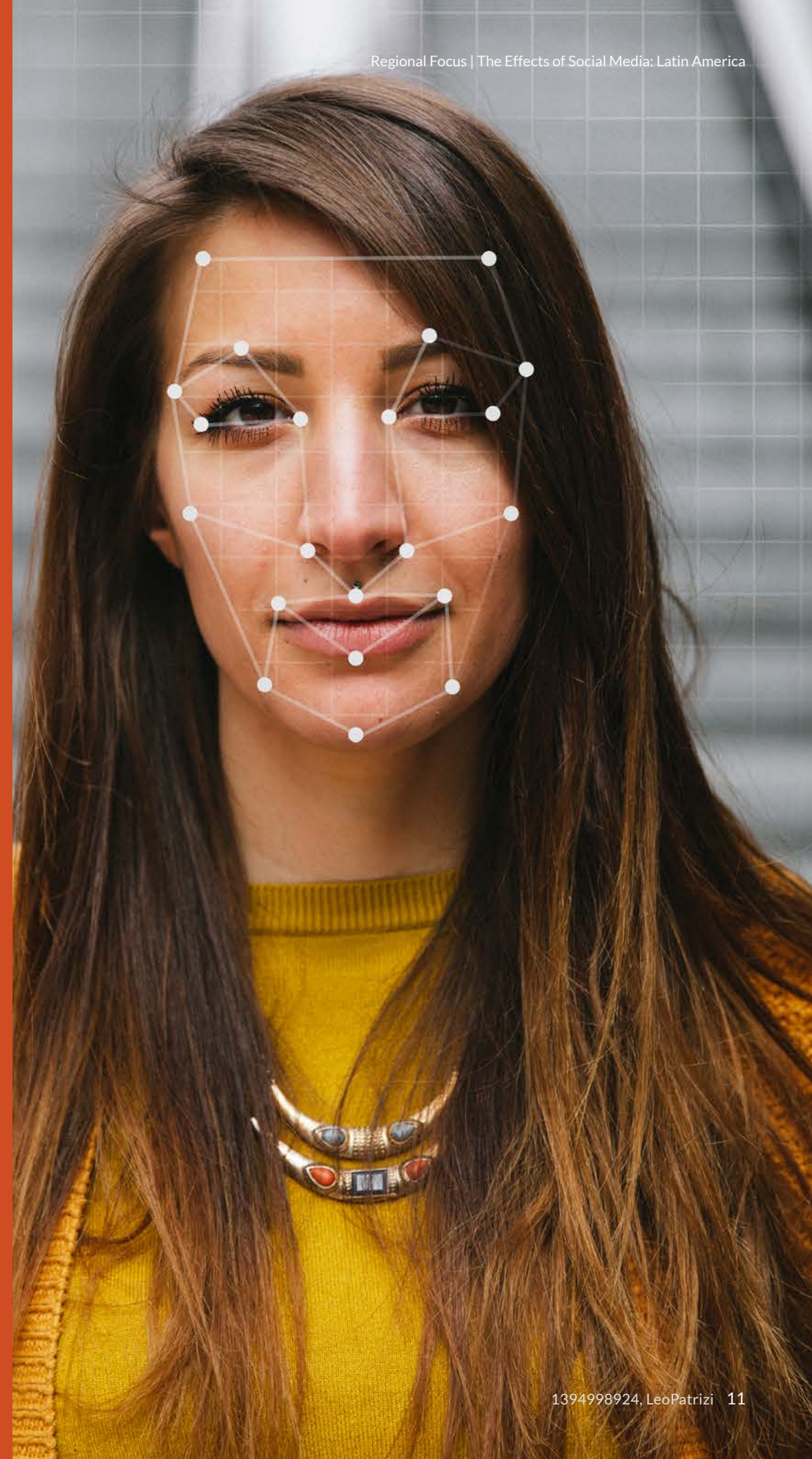
OR IS IT TECH APATHY?

What's interesting is that GenZers and Millennials—the heaviest users of social media—don't trust the veracity of the things they see online and have increasingly complicated relationships to the platforms on which they appear. For example, they are more likely to report that social media is worsening their mental health and exposing them to increasing discrimination and bullying.



For related articles on Authenticity and Social Media visit [VisualGPS.com](https://www.visualgps.com)





🌐 REGIONAL FOCUS

The Effects of Social Media

LATIN AMERICA

The majority of Latin Americans feel more connected than disconnected due to the prevalence of technology in their lives.

 **3 in 4**
Latin Americans

don't agree that social media platforms cause more harm than good and instead believe individual users are the problem

So, excitement about AI in this part of the world isn't tempered by hard feelings or baggage around other important technology in their lives.

UNITED STATES

All of today's tech giants—Meta, Google, Amazon, Microsoft and now OpenAI—and most of our major social media platforms have originated in the United States. The role the US currently plays in tech innovation has a major influence on consumer sentiment about it, especially social media.

While people in the US are frequently early adopters to new technologies like AI, they also often hold conflicting or even skeptical ideas about its proliferation.

See more harm than good coming from social media platforms



But

Also have not changed the rate of their usage of them



1 in 3 people in US

report they are even using it more often than ever

EUROPE

Understanding Europeans' feelings about technology in general helps better explain the reception of AI in this part of the world. In the same way they are divided about their sentiment regarding Artificial Intelligence, Europeans find themselves in a "connection paradox".

46%

say technology increases feelings of connection

50%

agree that it increases feelings of loneliness, and find their mental health deteriorated through social media

Nonetheless, Europeans—especially younger generations—do find inspiration through technology, powering a wave of creative entrepreneurship: more than half of Gen Z see social media as a way to build a personal brand.

The Value of Creativity in Building Trust

We know that there's ambivalence about the use of AI to create imagery, but we also know that certain populations care less than others. For example, younger generations (especially men) index higher on having a much more positive opinion of brands that use AI-generated images regardless of industry or subject type.

Regardless of how AI is used, there's a global call for transparency from people, especially because we're all losing a grip on discerning what's real: **nearly 9 in 10 consumers globally want to know whether an image has been created using AI.**

There's more trust in the authenticity of the image if it's made by professionals such as artists and photographers. Meaning that craft matters and adds credibility in a visual ecosystem that's this noisy. Overall, consumers don't want to feel that they have been fooled or lied to. Nearly 9 in 10 consumers globally want to trust that an image or video is "authentic". Sentiment skews more negative towards brands that are using AI generated visuals to create people or products.



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Is This Real Art?

LATIN AMERICA

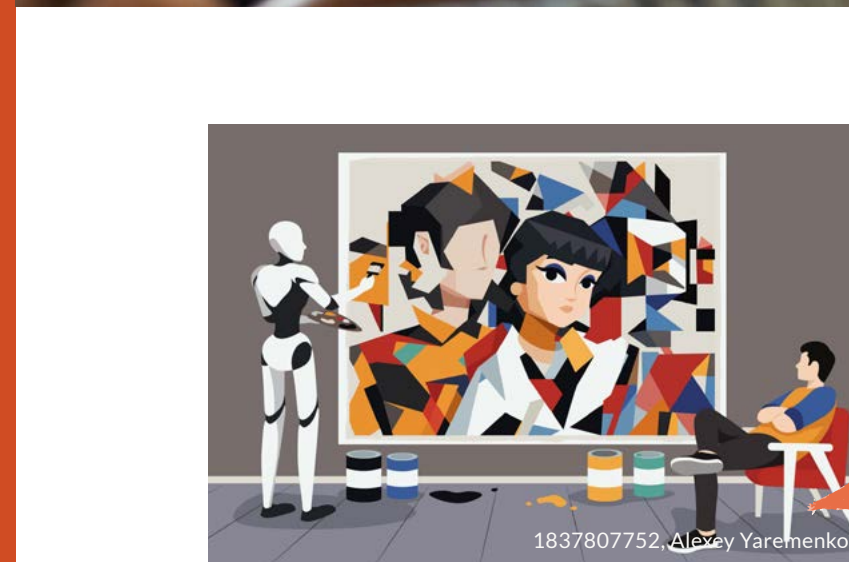
What do we make with AI? Our research tells us that for now, the most positive reception to AI-generated imagery are subjects that are inanimate (e.g., structures, buildings, landscapes/scenery) vs. real people. Image testing also reveals that the visuals that still stand out most are made with a camera and feel both real, candid, and personal. In fact, when consumers are asked to describe what works about the images they like, they share: "feel natural and real, like pictures I might take."



1439682636, Klaus Vedfelt



This image was created with Generative AI by Getty Images



1837807752, Alexey Yaremenko

66%

believe that using AI to create images diminishes the beauty of real art, underlining the region's nuanced approach to technological advancements



This image was created with Generative AI by Getty Images



REGIONAL FOCUS

The Real Thing

ASIA-PACIFIC

APAC consumers today favor authenticity and unretouched visuals. This is evidenced by a preference for seeing people that are “like me” and how products and services fit into their lives. While AI-generated content has its merits, it’s important to exercise careful consideration in deciding when and where to utilize it, considering these preferences.

We don’t see this as a tension. Our takeaway is that however visuals are made— with a generator or a camera—it’s important to hold ourselves to higher creative standards that feel most resonant with and connected to where consumers are. We see AI as an opportunity to introduce new worlds and more playful possibilities and clearing much higher thresholds around creativity and innovation. We see photography and video as an opportunity to continue feeding the authenticity still deeply desired by most consumers today in the way that they define it, not the industry. Are we all ready to live up to those expectations? We hope so.



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🌐 REGIONAL FOCUS

The Need for Transparency

EUROPE

Although there is excitement about Generative AI, Europeans are more skeptical when compared to the global average. A possible explanation is that Europeans—especially in France, Germany and Nordics—are less likely to say they can easily tell the difference between a real image and one that has been manipulated or altered. This pinpoints the importance of taking a nuanced approach to transparent communication around AI-generated content.

00100//100

📷 VISUAL RECOMMENDATIONS

A Little Humor and Realness Can Go a Long Way

Whether searching our pre-shot library or generating original visuals with the AI Generator, use these thought starters to help find or create an impactful image:

IT'S PLAYTIME!

- **Introduce new worlds.** AI-generated content can be a tool for invention, whether you're giving rise to new architectural forms and spatial design, dreaming up calmer digital experiences, or playing up the quirk and the uncanny. Consider forms of all kinds, inspired by the world we live in now or your vision for a future world.
- **Embrace soft design.** There's a ton of chaos in the world and anxiety to accompany it. What if you illustrated softer shapes, gauzier tertiary colors, oil-slick gradients? Illustrate positivity and peacefulness through representations of nature, or things that feel hand-written and analog.
- **Highlight the silly.** In addition to peace, humor and play matter in your visual stories. From ideas that may be weird and surreal, like a giant pink translucent rubber duck stuck in a desert, perhaps? Stand out by embracing ideas that make people laugh or smile.



KEEP IT REAL

- **Specificity is the answer.** Monoculture is dead in most places, so there's power in being specific about the stories you tell. Choose visuals that feature people of all backgrounds, living their real lives, doing whatever niche interests tickles their fancy. Bring personality and dimension forward instead of papering over difference. People feel most seen when they can see people that feel real and three-dimensional.
- **Tell a surprising story.** The visuals that stand out most make you feel connected to what you see. The most memorable way to connect is through storytelling, so ask yourself what stories can you show that are unexpected or haven't been seen before? Breakdown stereotypes for example of who demonstrates tenderness when parenting or who leads at work or who likes a certain hobby. Imagine new stars at the helm of tried-and-true visual concepts like connection, togetherness, teamwork, etc.

Authenticity is Everything... Especially with AI

What does it mean to be real in a world full of generated images? What's going to connect with consumers who are already skeptical of what they see online? And how will creativity help you break through?

IT'S COMPLICATED...

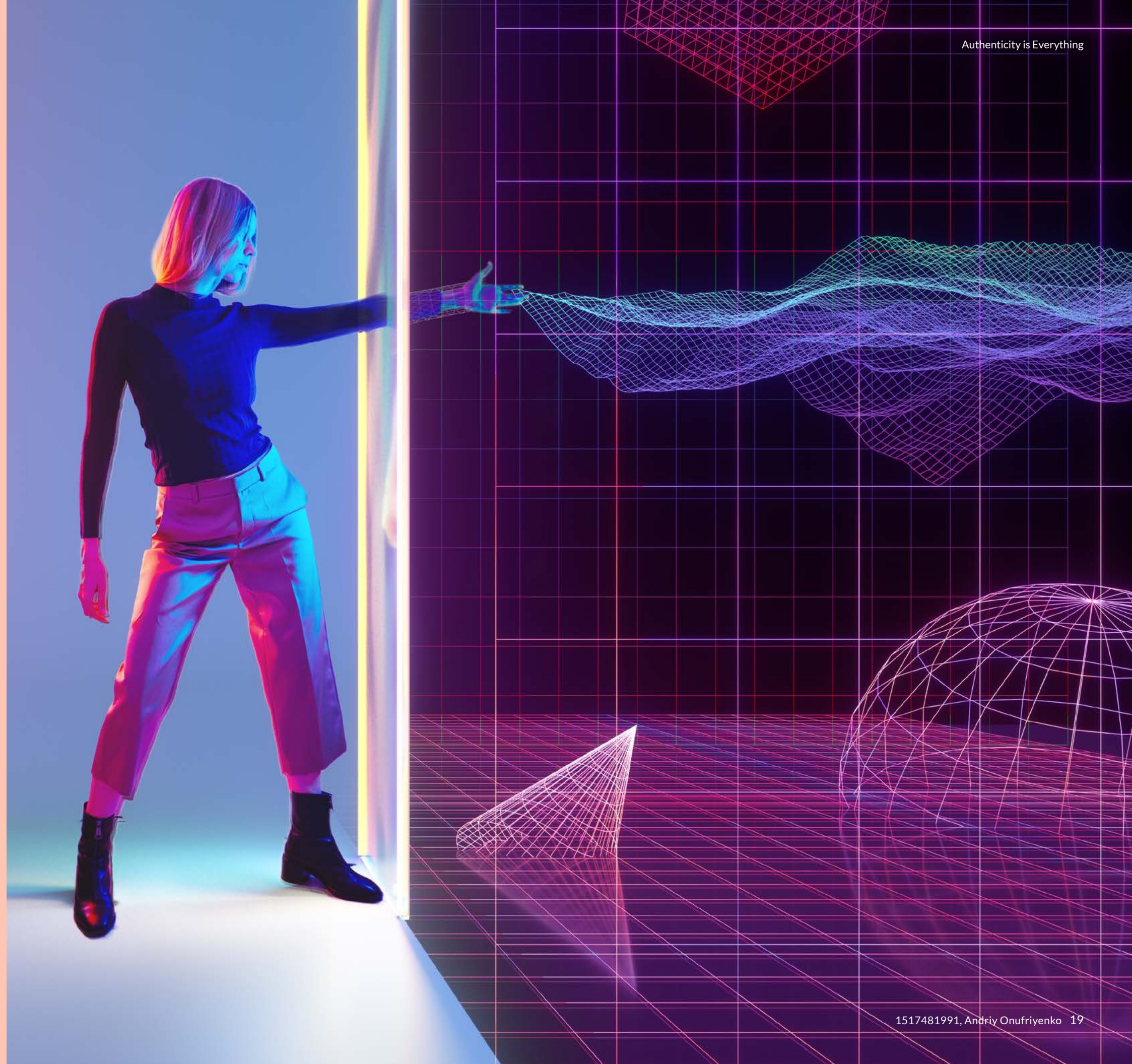
87% of people think it's important for an image to be authentic

But what does authenticity even mean when we don't know what's real, we live in a world informed by algorithmic filters and plenty of people are distrusting the things they are seeing? We asked consumers how they'd define authenticity which validated the knottiness of everyone's feelings.

TOP 3 WAYS GLOBAL CONSUMERS DEFINE "AUTHENTICITY"

1. Something genuine, expressing one's true thoughts, feelings and experiences
2. Something that is not fake or counterfeit
3. Something that is sincere and honest

Does a preference for authenticity that aligns with these consumer definitions mean that brands should not be using AI-generated imagery? No, not necessarily. It just means that consideration and thoughtful intention on how AI-generated imagery is deployed is alongside visuals of all origins is key.



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What Does Authenticity Mean Around the World?



UNITED STATES

Realness reigns with a preference for something not “fake or counterfeit”.

EUROPE

Earnestness is a theme in Europe with a preference for something that is sincere and honest.

LATIN AMERICA

Creativity and originality are critical with a preference for something that’s original, the first of its kind. Many younger generations of all backgrounds and locations feel the same.

ASIA-PACIFIC

Realness reigns with a preference for something not “fake or counterfeit” —even more so than the US’

Risks and Rewards: Our Take on Using AI Generated Imagery

Getty Images runs on the creativity and expertise of the thousands of creators that capture the photos and videos that move the world. So, with the initial launch of our Generative AI tools in 2023, what's our take on how and when to use this new game changing technology?

Though generative AI tools may feel bright, shiny, and full of possibility—there's still the reality their use poses more risk than a brand may feel comfortable with. Similar to when you select pre-shot imagery to represent your brand and tell your story, getting it wrong could mean destroying the trust and connection that drives consumers to act. Whether it's coming across as inauthentic or offensive, being less than transparent that an image is AI generated versus shot by camera, or opening yourself up to legal exposure, there are several considerations when weighing the risks and rewards of using generative AI. One has to acknowledge it might not be the right tool for every project.



4 Things to Consider When Using Generative AI

1 Know your audience and your intent

We suggest taking an intentional approach to why, when, and how you use generative AI visuals within a brand campaign. Question what your campaign message is and whether AI-generated images are the right content to use in this case. If the campaign is addressing authenticity or if your audience cares about representation—real people and real connections—AI-generated content is not the right fit. It's about remaining authentic in the relationship between the brand and the customer, establishing or reinforcing trust.

2 AI is a tool, not a replacement for human creativity

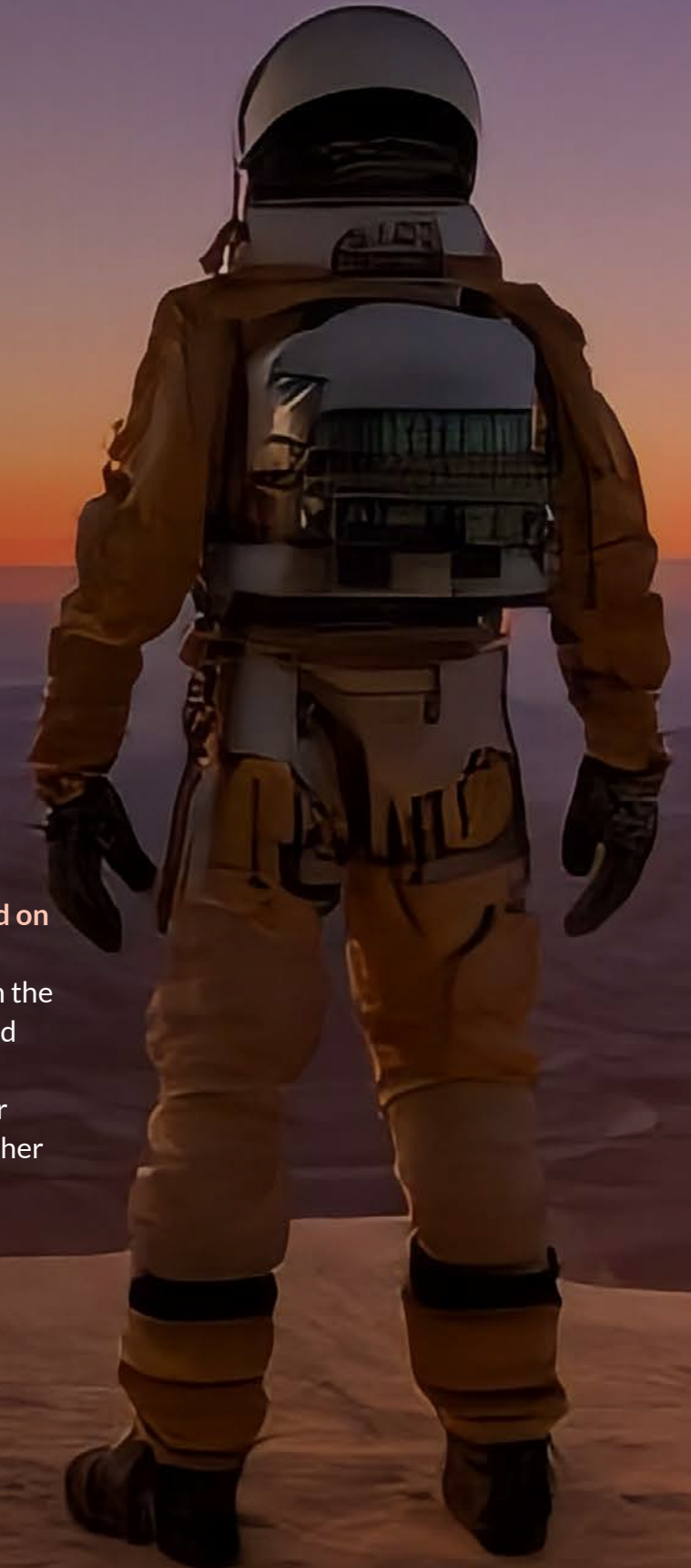
As we all know, it's those off the cuff conversations in which we share thoughts and observations person to person where the magic often happens. Beyond their training sets, generative AI tools have no knowledge of—nor experience of—what's going on in the world. It can only access what has been, not react to the present or future—or consider how people currently feel about a brand or product. The human touch continues to be an important element in forging that connection.

3 Keep authenticity in focus

A key component of trust in this new era of AI is authenticity. According to our VisualGPS research people define 'authentic' as 'real/the real thing', followed by 'true/truthful' and 'original' and 98% of consumers agree that 'authentic' images and videos are pivotal in establishing trust. Essentially, no one wants to feel hoodwinked. This is consistent with the huge response we've seen to our collections [#ShowUs](#), [The Disability Collection](#), and [The Disrupt Aging Collection](#)—all of which have authenticity baked into them, either informed by or created by the people they represent. Knowing this, it's fair to say that in the incoming tide of generative AI tools and content, thoughtfully crafted ideas by expert creatives will cut through and engage audiences more than ever.

4 Understand the nature of the AI tools and the data they were trained on

Generative AI is a powerful tool and history shows us that new technologies never stifle creativity; they just shake up who gets to join the game. Remember when smartphones didn't kill off cameras but opened up photography to everyone? Just like photography didn't put an end to painting but sparked new artistic movements and the electric guitar paved the way for rock and roll. It's the same idea here—AI is just another player in the game of unleashing creative brilliance.



Next Steps

At Getty Images, we're excited about how commercially safe generative AI in your hands can lead to creative, impactful work, that connects with your customers. AI will undoubtedly change the way we work, but we think it will do so for the better, facilitating creativity in new ways. With a safe, intentional approach and good quality tools that provide legal indemnification, we can move on from worrying about how AI will steal our jobs or pose a risk to our businesses to how AI will augment our creativity.

The possibilities that AI tools create are practically endless. But you need to make sure you're mitigating risk by using it responsibly, respecting intellectual property rights, and meeting consumer expectations. Our experts will continue to monitor the latest advances in AI and deliver comprehensive research and reporting that will help you connect and have impact.

🔗 [Learn more + Watch a demo of Generative AI by Getty Images](#)

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