'18

Font Purchasing Survey

‘18

Font Purchasing
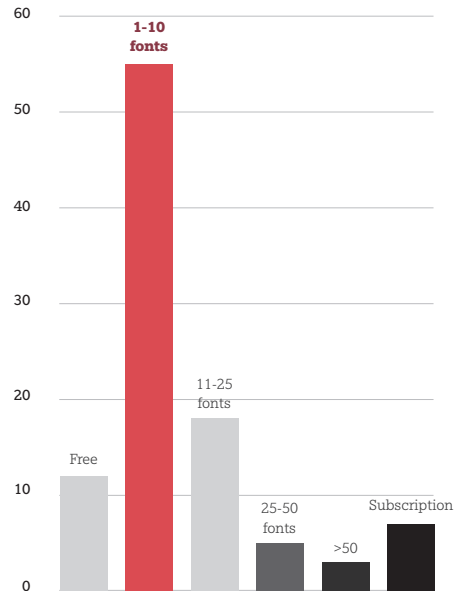Habits Survey

WHAT DO CUSTOMERS WANT?

56 questions
May 5 to June 20, 2018
15,745 responses

Demographics
Font features
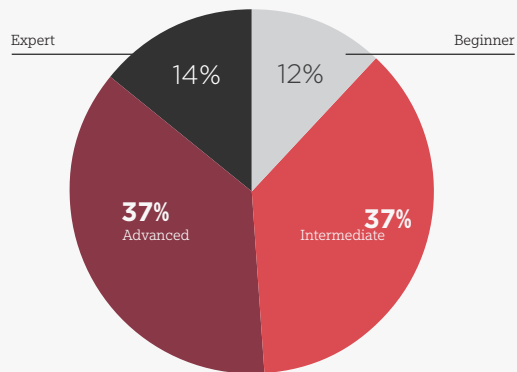Survey
Variable fonts
Customer segments
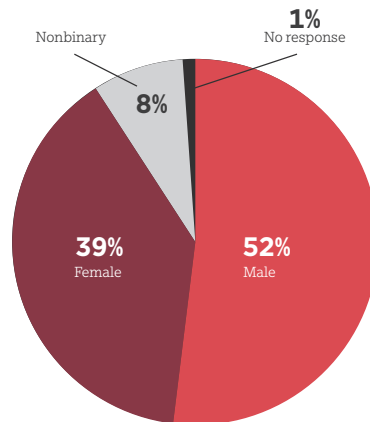
1.

DEMOGRAPHICS

Purchases

How many individual
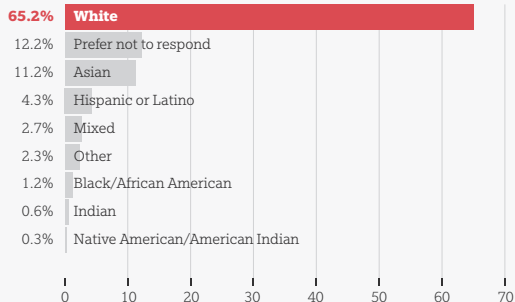fonts do you purchase in
a year on average?

Skill Level

Expert
14%

12%
Beginner

37%
Advanced

37%
Intermediate

Gender

Nonbinary
8%

1%
No response

39%
Female

52%
Male

Ethnicity

65.2%	**White**
12.2%	Prefer not to respond
11.2%	Asian
4.3%	Hispanic or Latino
2.7%	Mixed
2.3%	Other
1.2%	Black/African American
0.6%	Indian
0.3%	Native American/American Indian

0 10 20 30 40 50 60 70

Age

>65 years
18-25 years
36-45 years
6%
11%
11% 18-25 years
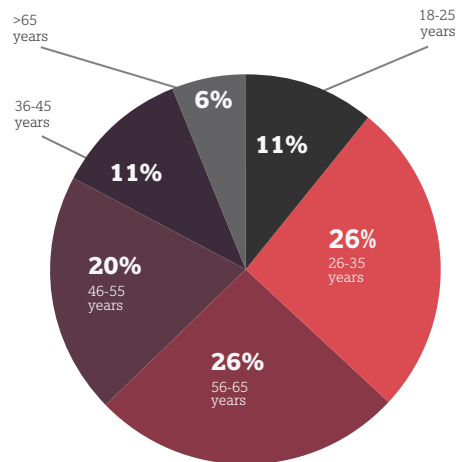**26%** 26-35 years
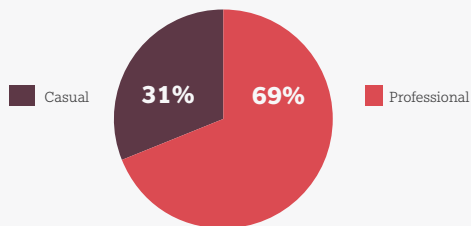**20%** 46-55 years
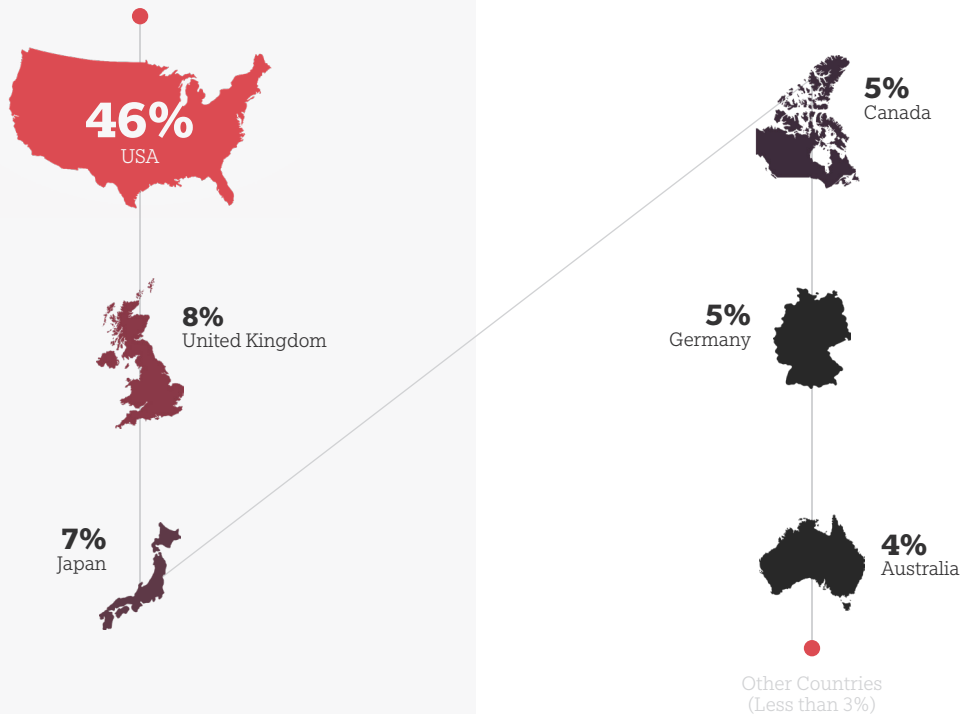**26%** 56-65 years

Average age:
41.6 years

Font Use

When you buy fonts, do you use them for mostly personal projects that don't create income (casual) or as a part of your job (professional)?

■ Casual **31%** **69%** ■ Professional
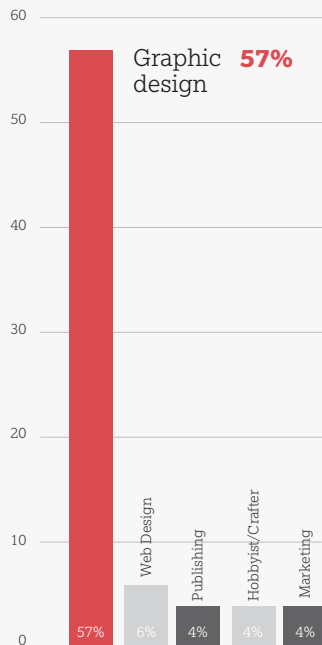
Location

Responses from 119 countries

46%
USA

8%
United Kingdom

7%
Japan

5%
Canada

5%
Germany

4%
Australia

Other Countries
(Less than 3%)

Industry

Please select the primary field in which you use fonts:

Graphic design **57%**

Web Design	6%
Publishing	4%
Hobbyist/Crafter	4%
Marketing	4%

57%

In 2017, 57% of respondents also used primarily fonts in graphic design.

Work

Which of the following best describes your work environment?

41%
Freelance

26% Small Studio
1-10 people

06% Medium Agency
11-50 people

02% Large Agency
1-100 people

10% In-House Small Company
1-100 people

04% In-House Medium Company
1-100 people

01% In-House Large Company
101-500 people

02% In-House Very Large Company
101-500 people

04% In-House Educational Institution

04% In-House Other

Top Distributors

■ 2018
— 2017

Average number of distributors used per customer:

4
2018

5
2017

Distributor	Percentage
MyFonts	77%
Google Fonts	43%
DaFont	39%
Adobe TypeKit Subscription	32%
Font Squirrel	29%
Creative Market	27%
Free Font Websites	21%
Fonts.com	20%
Other	15%
FontShop	13%
Design Cuts	11%
FontSpring	11%
Linotype	10%
Lost Type Co-op	10%
Envato	10%
Individual Type Designer's Websites	9%
Hoefler & Co.	8%
Adobe TypeKit Marketplace	7%
The Hungry JPEG	7%
FontBundles.net	7%
Mighty Deals	6%

2.
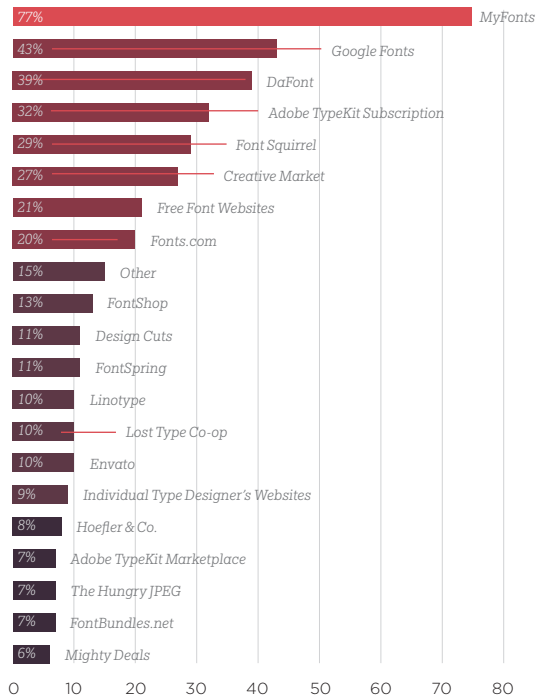
FONT FEATURES
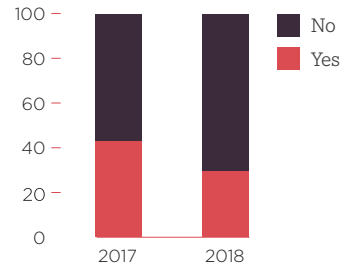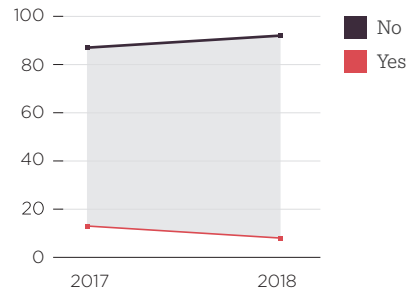
Type Designers

Do you personally know a type designer?

I have created and sold a typeface before.

Type Designers

No
Maybe
Yes
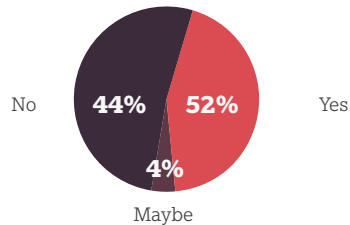
I use software that can access alternate characters and OpenType features in fonts.

2018

21% 17%
62%

2017

15% 9%
76%
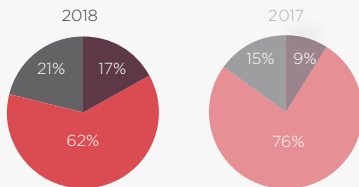
Are you aware that Adobe Typekit is included with Creative Cloud subscriptions?

No **33%** **67%** Yes
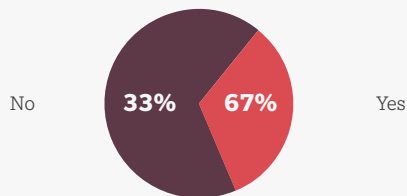
I use fonts from a subscription service.

No **44%** **52%** Yes
4%
Maybe

I pay for a subscription music or video service.

No **73%** **27%** Yes
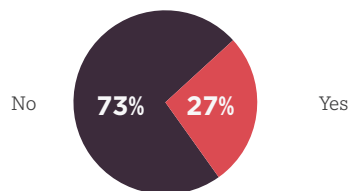
Type Features

82%

of respondents consider the number of styles in a typeface important when purchasing

82%	**Number of styles**
42%	Number of glyphs
41%	Kerning
40%	Alternates
37%	Spacing
37%	License types available
35%	Ligatures
30%	Webfont availability
27%	Small caps availability
24%	Foundry that designed the typeface
24%	Language Support
21%	Well-designed diacritics
20%	Arrows or other symbols
18%	Optical sizes offered in family
16%	Old-Style numbers
11%	Instructions to access features
3%	Awards won by typeface
2%	PUA encoded glyphs

2017 Top 6:

1. Number of styles
2. Kerning
3. Alternates
4. Ligatures
5. Spacing
6. Number of glyphs

Type Evaluation

89% See the entire character set
77% Type out my own words and phrases
56% See if it has ligatures and alternates
53% Select and compare fonts with each other
40% Be inspired by images
35% Access features without needing design features
30% See which languages it covers
21% See a count of the number of glyphs
19% Read ratings, reviews, or Q&A from other users
13% Be able to tell if it is popular or not

2017 Results

93% See the entire character set
88% Type out my own words and phrases
78% See if it has ligatures and alternates
54% Be inspired by images
40% See which languages it covers
37% Access features without needing design features
32% See a count of the number of glyphs
29% Read ratings, reviews, or Q&A from other users
16% Be able to tell if it is popular or not
-- Select and compare fonts with each other

Licenses

When I download fonts, I mostly license fonts with:
(multiple answers possible)

73% **Desktop Licenses**
(commercial-use)

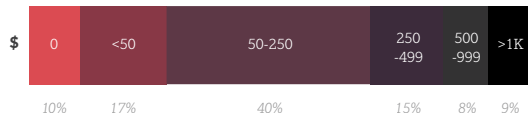**32%** **Personal Use Licenses**

25% **Webfont Licenses**
(commercial-use)

19% **Extended Licenses**
(commercial-use)
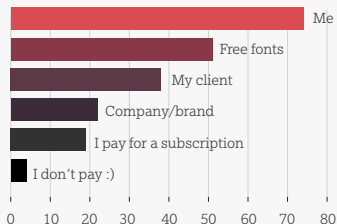
11% **I'm not not sure**

Annual Spend

If you had to guess, approximately how much have you spent on fonts
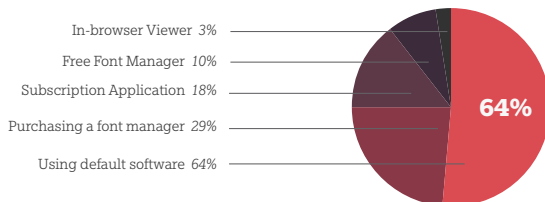for yourself or on behalf of a client or organization in the last 12 months?

$	0	<50	50-250	250 -499	500 -999	>1K
	10%	17%	40%	15%	8%	9%

Budget

Usually, my font budget comes from:
(multiple answers possible)

Me
Free fonts
My client
Company/brand
I pay for a subscription
I don't pay :)

0 10 20 30 40 50 60 70 80

Organization

How do you manage/organize fonts after you
purchase them? (multiple answers possible)

In-browser Viewer 3%
Free Font Manager 10%
Subscription Application 18%
Purchasing a font manager 29%
Using default software 64%

64%

3.

SURVEY

How scale of 1 to 5 worked in the survey:

(1 meaning disagree and 5 meaning agree)

STATEMENT:

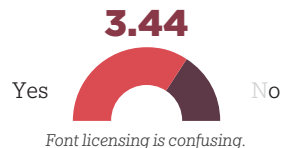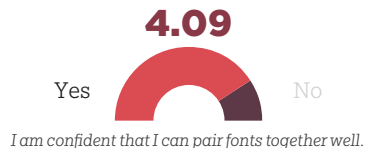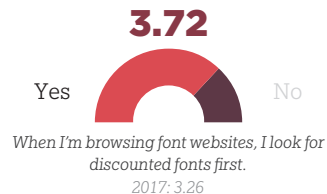| Disagree	Somewhat Disagree	Neutral	Somewhat Agree	Agree
●	○	○	○	○

STATEMENT:

Disagree	Somewhat Disagree	Neutral	Somewhat Agree	Agree
○	●	○	○	○

STATEMENT:

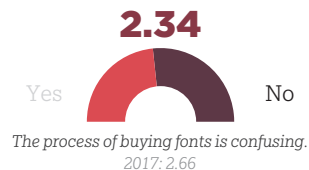| Disagree	Somewhat Disagree	Neutral	Somewhat Agree	Agree
○	○	○	●	○

4.24

Yes   No

When I buy a font, I feel confident that I know exactly what I am getting.

2017: 3.87

2.81

Yes   No

I have positive feelings about font subscription service plans.

2017: 2.87

3.93

Yes   No

There are a few foundries that are my go-to for fonts. I check their fonts first to see if they have what I need before browsing.

2017: 3.78

2.34

Yes   No

The process of buying fonts is confusing.

2017: 2.66

3.42

Yes   No

Keeping track of font licenses is a major pain point in my work.

3.72

Yes   No

When I'm browsing font websites, I look for discounted fonts first.

2017: 3.26

4.09

Yes   No

I am confident that I can pair fonts together well.

3.44

Yes   No

Font licensing is confusing.

Workhouse Fonts

Script Fonts

" Imagine you want to purchase a typeface family that will be your go-to font for a variety of typographic uses — set in large and small sizes in documents, presentations, and more. It's probably either a sans or serif category, with many weights, italics, obliques, small caps, language, support, and OpenType features. **What would you pay for a basic desktop license for this complete family?** (in USD) **"**

" Imagine a three-weight family of script typefaces. All of the letters connect smoothly, there are many alternates and ligatures, it contains well-designed diacritics, and it comes in three weights. **What would you pay for this family of three fonts?** (in USD) **"**

Average:

$55

Average:

$118

2017 Average

$70

2017 Average
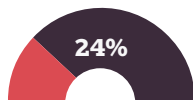
$175

4.

VARIABLE FONTS

"I think fonts can be
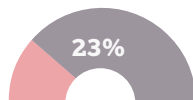
SEXY."

— 58% of customers

2017: 55% agree

Variable Fonts

I'm optimistic. I believe they will change
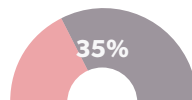how fonts are made and used in the future.
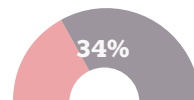
24%
2018

23%
2017

I'm undecided. I've heard of variable fonts
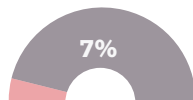but I have no idea how to use them.

35%
2018

34%
2017

I'm pessimistic. They're a cult technology
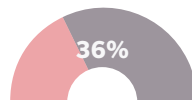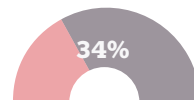that won't be supported fully enough.

5%
2018

7%
2017

I don't even know what variable fonts are
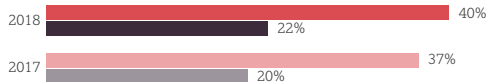¯_(:))_/¯

36%
2018

34%
2017

Variable Fonts Survey

Legend

■ Type Designers ■ Disagree

I'm optimistic. I believe they will change how fonts are made and used in the future.

2018
- 40%
- 22%

2017
- 37%
- 20%

I'm pessimistic. They're a cult technology that won't be supported fully enough.

2018
- 40%
- 22%

2017
- 37%
- 20%

I'm undecided. I've heard of variable fonts but I have no idea how to use them.

2018
- 31%
- 35%

2017
- 31%
- 35%

I don't even know what variable fonts are ¯_(:))_/¯

2018
- 18%
- 38%

2017
- 12%
- 39%
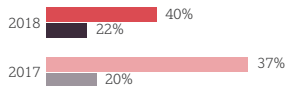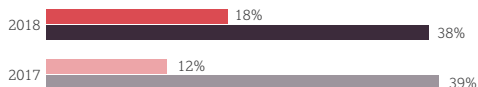
"I often customize fonts after buying them by changing small details about the letters in design software."

38% disagree

+
Somewhat Agree: **21%**
Neutral: **16%**
Somewhat Disagree: **13%**
Agree: **12%**

"When using a font, I sometimes wish I could make the letters just a little taller or wider, or make the font just a little bolder or lighter."

31% somewhat agree
29% agree

+
Neutral: **20%**
Disagree: **11%**
Somewhat Disagree: **9%**

Variable Fonts Survey

"When using a font, I sometimes wish I could make the letters just a little taller or wider, or make the font just a little bolder or lighter."

31% somewhat agree
29% agree

+

Neutral: **20%**
Disagree: **11%**
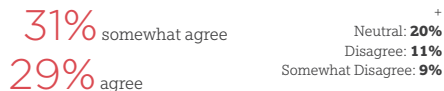Somewhat Disagree: **9%**

"When using a font, I sometimes wish I could make the letters just a little taller or wider, or make the font just a little bolder or lighter."

31% somewhat agree
29% agree

+

Neutral: **20%**
Somewhat Disagree: **9%**
Disagree: **11%**
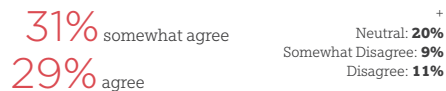
5.

FONT COMPANY FEELINGS

From the list below, which word do you most associate with _____?

Don't think too hard about this question; just select the one that speaks to you first.

Cutting-edge	Democratic	Trendy
Historic	Accessible	Friendly
Monopoly	Authority	Elite

From the list below, which word do you most associate with:

Google Fonts

Accessible: 35%

Monopoly	20%	Authority	7%
Democratic	11%	Cutting-edge	6%
Friendly	9%	Elite	2%
Trendy	8%	Historic	2%

From the list below, which word do you most associate with:

Creative Market

Trendy: 42%

Friendly	24%	Elite	2%
Accessible	16%	Historic	1%
Democratic	7%	Authority	<1%
Cutting-edge	5%	Monopoly	<1%

From the list below, which word do you most associate with:

MyFonts

Accessible: 35%

Friendly	29%	Elite	4%
Trendy	17%	Democratic	3%
Authority	5%	Monopoly	<2%
Cutting-edge	4%	Historic	<2%

From the list below, which word do you most associate with:

Monotype

Historic: 39%

Accessible	12%	Friendly	5%
Authority	12%	Monopoly	5%
Elite	12%	Democratic	4%
Trendy	8%	Cutting-edge	3%

Company Feelings

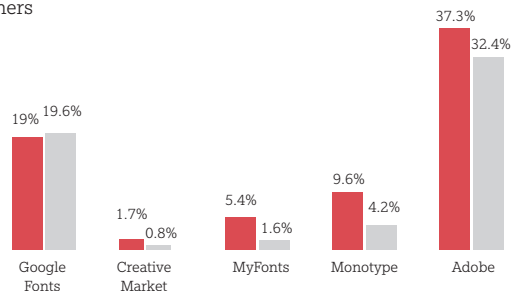From the list below, which word do you most associate with:

Adobe

Monopoly: 39%

Authority	21%	Historic	9%
Accessible	13%	Friendly	3%
Cutting-edge	9%	Trendy	3%
Elite	9%	Democratic	1%

How monopolistic is this company?

- Type Designers
- Others

Google Fonts: 19% / 19.6%
Creative Market: 1.7% / 0.8%
MyFonts: 5.4% / 1.6%
Monotype: 9.6% / 4.2%
Adobe: 37.3% / 32.4%

How democratic is this company?

- Type Designers
- Others

Google Fonts: 14.2% / 10.5%
Creative Market: 8.2% / 6.8%
MyFonts: 6.9% / 3.1%
Monotype: 4.2% / 4.1%
Adobe: 3.1% / 1.0%
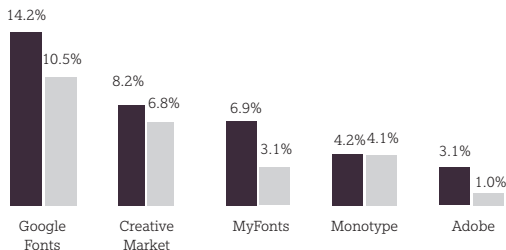
6.

CUSTOMER
SEGMENTS

How many individual fonts do you
purchase in a year on average?

1 - 10 fonts

11 - 25 fonts

26 - 50 fonts

>50 fonts

I only download
free fonts

I have a
subscription service
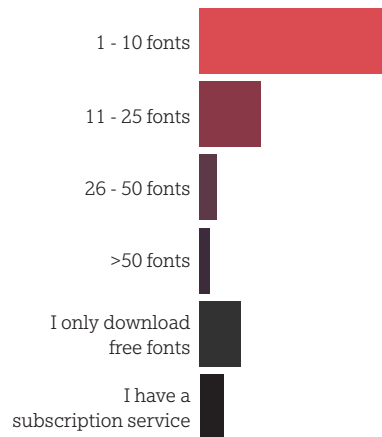
Skill level

"I only download free fonts"

% of total: 12%
N = 1958
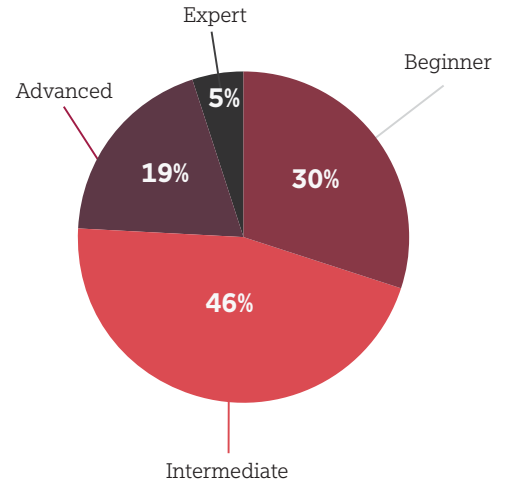
Expert 5%

Advanced 19%

Beginner 30%

Intermediate 46%

Miscellaneous

I use software where I can access alternate characters and use OpenType features in fonts.

Yes 37%	No 24%	Unsure 39%

When I download fonts, I mostly license fonts with: *(multiple answers possible)*

Desktop	42%
Webfont	18%
Extended	10%
Personal Use	44%
I'm not sure	31%
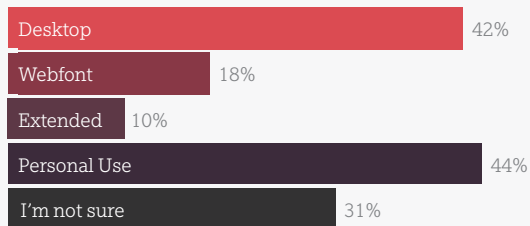
19% know a type designer

5% are a type designer

59% pay for a music or video subscription

31% agree that: "Font licensing is confusing"

47% agree that: "Fonts are too expensive"

56% casual users

52% don't know about variable fonts

Skill level

"1-10 fonts"

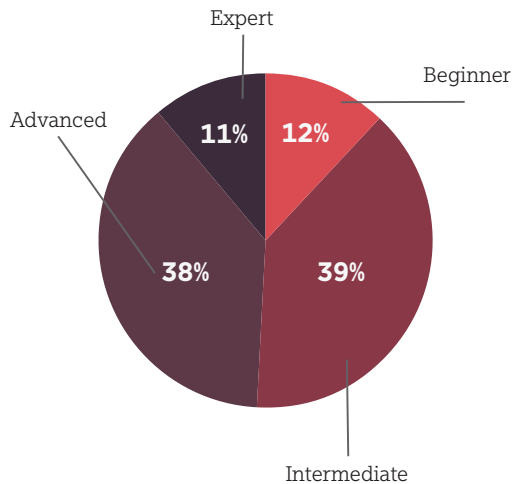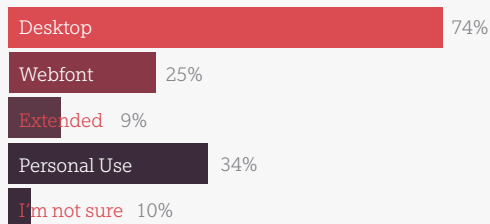% of total: 55%
N = 8591

- Expert — 11%
- Beginner — 12%
- Intermediate — 39%
- Advanced — 38%

Miscellaneous

I use software where I can access alternate characters and use OpenType features in fonts.

Yes 60%	No 19%	Unsure 21%

When I download fonts, I mostly license fonts with: *(multiple answers possible)*

Desktop 74%

Webfont 25%

Extended 9%

Personal Use 34%

I'm not sure 10%

28% know a type designer

7% are a type designer

73% pay for a music or video subscription

31% agree that: "Font licensing is confusing"
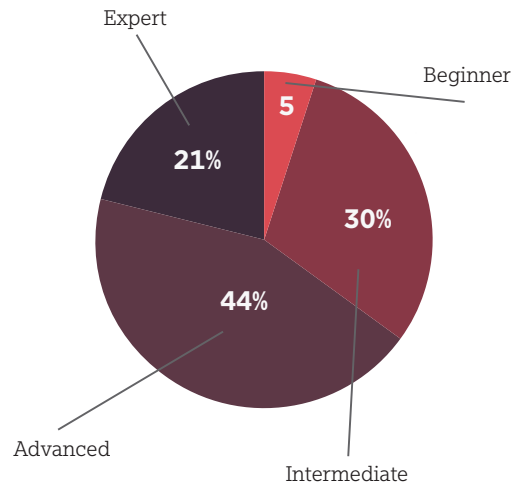
27% agree that: "Fonts are too expensive"

31% casual users

37% don't know about variable fonts

Skill level

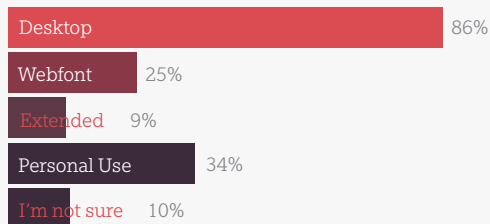**"11-25 fonts"**

% of total: 18%
N = 2833

Expert
21%

Beginner
5

30%

44%

Advanced

Intermediate

Miscellaneous

I use software where I can access alternate characters and use OpenType features in fonts.

Yes 72%	No 13%	Unsure 15%

When I download fonts, I mostly license fonts with: *(multiple answers possible)*

- Desktop 86%
- Webfont 25%
- Extended 9%
- Personal Use 34%
- I'm not sure 10%

32% know a type designer

10% are a type designer

79% pay for a music or video subscription

22% agree that: "Font licensing is confusing"
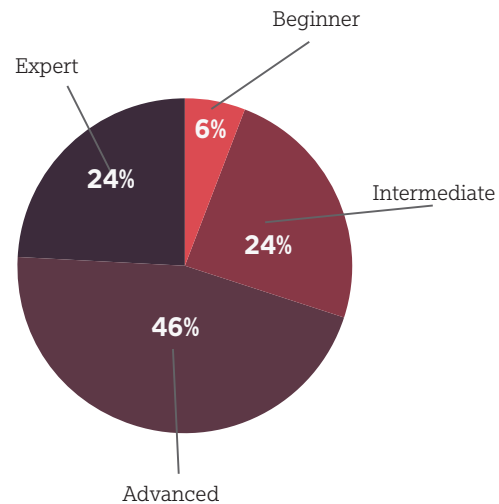
24% agree that: "Fonts are too expensive"

20% casual users

28% don't know about variable fonts

Skill level

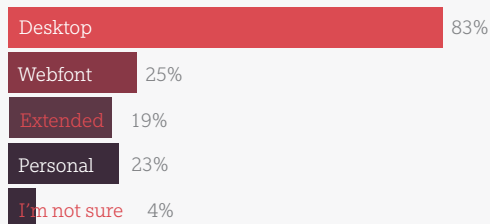**"26-50 fonts"**

% of total: 5%
N = 850

Beginner
6%

Expert
24%

Intermediate
24%

Advanced
46%

Miscellaneous

I use software where I can access alternate characters and use OpenType features in fonts.

Yes 83%	No 13%	Unsure 10%

When I download fonts, I mostly license fonts with: *(multiple answers possible)*

Desktop 83%

Webfont 25%

Extended 19%

Personal 23%

I'm not sure 4%

34% know a type designer

14% are a type designer

75% pay for a music or video subscription

20% agree that: "Font licensing is confusing"
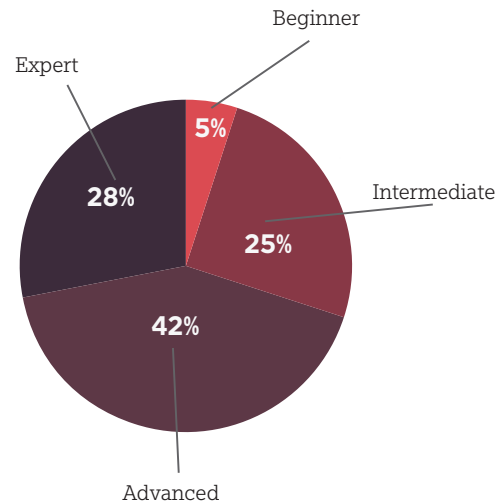
23% agree that: "Fonts are too expensive"

21% casual users

23% don't know about variable fonts

Skill level

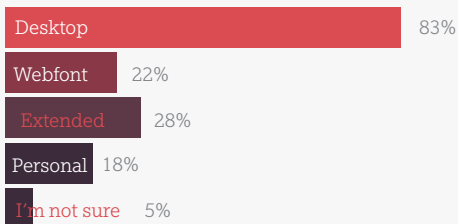**"More than 50"**

% of total: 3%
N = 420

Beginner 5%

Intermediate 25%

Advanced 42%

Expert 28%

Miscellaneous

I use software where I can access alternate characters and use OpenType features in fonts.

Yes 79%	No 9%	Unsure 12%

When I download fonts, I mostly license fonts with: *(multiple answers possible)*

- Desktop — 83%
- Webfont — 22%
- Extended — 28%
- Personal — 18%
- I'm not sure — 5%

32% know a type designer

12% are a type designer

78% pay for a music or video subscription

19% agree that: "Font licensing is confusing"
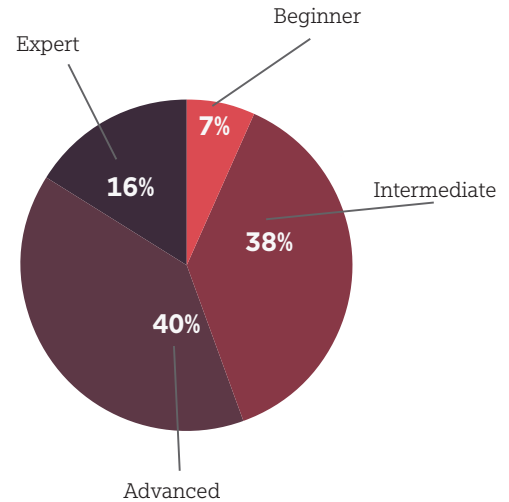
25% agree that: "Fonts are too expensive"

24% casual users

30% don't know about variable fonts

Skill level
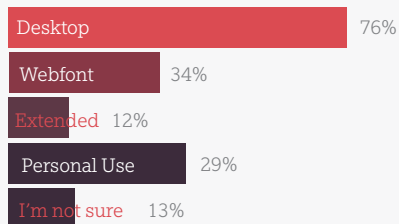
"I have a subscription service"

% of total: 7%
N = 1091

- Beginner 7%
- Intermediate 38%
- Advanced 40%
- Expert 16%

Miscellaneous

I use software where I can access alternate characters and use OpenType features in fonts.

Yes 71%	No 11%	Unsure 18%

When I download fonts, I mostly license fonts with: *(multiple answers possible)*

Desktop **76%**

Webfont **34%**

Extended **12%**

Personal Use **29%**

I'm not sure **13%**

34% know a type designer

09% are a type designer

83% pay for a music or video subscription

28% agree that: "Font licensing is confusing"

34% agree that: "Fonts are too expensive"

24% casual users

29% don't know about variable fonts

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