Emerging Markets for the Consumer Digital Imaging Industry: A Study of Brazil, Mexico, India and China

- Detailed insights on tomorrow’s buyers
- Demographic profiling by country
- End-to-end analysis of consumer imaging behavior (from capture to print)
- Identification of opportunities and potential strategies for vendors
InfoTrends’ study entitled “Emerging Markets for the Consumer Imaging Industry – A Study of Brazil, Mexico, India and China,” is designed to help digital imaging vendors and suppliers understand the dynamics of these emerging markets and clearly understand what is necessary to be successful in each.

**>>Introduction**

The emergence and growth of developing economies across the globe comes at a critical time for the photo and imaging industries. The US and Western European digital camera markets in particular have matured, and digital camera unit shipments for both markets peaked in 2007. Consumer behavior in these established regions has continued to evolve at a rapid pace, as consumers themselves become more connected, more mobile, and more expressive with their images. Add to that the growing collections of consumer images and the bi-directional flow of images between devices and across the Web, and you have a category struggling to identify its best sources of future revenue at a critical time in its development.

Vendors that establish themselves early in emerging markets will have the opportunity to learn from the recent successes and shortcomings of the digital imaging evolution, and to influence the future direction of these nascent markets. For example, InfoTrends’ latest forecasts show China and India representing over 70% of Asia Pacific unit shares for digital cameras in 2014, while Smartphone shipments are growing rapidly in Latin America and Mexico. These geographies represent a huge opportunities for vendors, especially if they are able to influence consumers and their photo capture, sharing, workflow, and printing behavior. Consumers in each of these regions are unique, and understanding variations by country and by demographic segment is critical to business growth.

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>>Who Should Subscribe?
Providers of Photo-Related:
>> Hardware (cameras, mobile devices, printers)
>> Software (creative, editing, management, workflow)
>> Services
>> Online Solutions
>> Accessories
>> Enabling Technologies

>>Project Objectives
This study is designed to provide vendors with critical planning information needed to develop successful growth strategies in each key developing market. It will:
>> Identify and profile current and future users of digital photography hardware, software, and services by country
>> Consider behaviors associated with technology adoption, purchase, and use
>> Analyze product preferences
>> Examine digital camera and digital photo activities
>> Study consumers’ use of mobile phones and smartphones:
   > Photo capture, transfer, sharing and printing behavior
>> Look at the use of photo sharing sites
>> Evaluate photo printing behaviors and variations by demographics and by channel:
   > Home, Retail, Online
>> Identify unmet consumer needs

>>Critical Questions Addressed by this Study

Digital Cameras / Mobile/Smartphones
>> Types of cameras (film, point and shoot, SLR, mobile phone/smartphone) owned and used
>> Technology used in the home / devices carried on a regular basis
>> Digital camera brands owned
>> Accessories owned
>> Future purchase intentions
>> Mobile phone/smartphone ownership and frequency of use
>> Number of digital camera and mobile phone photos taken
>> Use of video capture features

Printing / Photo Gifts
>> Frequency of printing
>> Volume of printing
>> Location of printing
>> Purchase patterns and purchasing locations for photo merchandise

Mobile and Online Behavior
>> Mobile phone photos uploaded, edited, shared, saved, and printed
>> Frequency of online photo service usage
>> Reasons for sharing via online services
>> Use of specific Web sites

Digital Photo Activities
>> Type of software currently used
>> Editing behavior
>> Sharing and storage methods
>> Creative photo activities
Market Research

This study is based on survey research with consumers in each country in order to determine the product / service requirements and opportunities for imaging vendors in these emerging markets.

A structured survey was administered with a target of 500 qualified participants per country. The geographic focus in each country was on major cities with likely buyers of digital imaging products and services.

Relevant internal global forecasts and related reports were leveraged where possible to provide additional market insights.

Analysis & Project Deliverables

Survey results were used to outline the opportunities and issues within each country. Clients will receive the following for use by senior management, product managers and planners, and marketing executives:

- A written report providing analysis of survey data, key findings and overall recommendations
- PowerPoint summary slides with charts, graphs, and key findings
- Data cross tabulations for additional analysis of key questions and market segments

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All regions included: Brazil, Mexico, India, China
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InfoTrends is the leading worldwide market research and strategic consulting firm for the digital imaging and document solutions industry. We provide research, analysis, forecasts, and advice to help clients understand market trends, identify opportunities, and develop strategies to grow their businesses.

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