

The Consumer Digital SLR Marketplace: Identifying and Profiling Emerging Segments

Report Fast Facts

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Abstract

This study is designed to provide companies that are interested in the consumer DSLR market with critical business planning information. It will:

- Segment and profile the customers for digital SLRs, including gender, age, technology adoption habits, and type of photographer
- Examine digital photo activities
- Provide insight into feature requirements and interest in new technologies
- Determine purchasing decision criteria
- Identify accessories owned, including lenses
- Forecast the DSLR market by price segments and forecast market size for units and revenue
- Identify opportunities and strategies for digital SLR camera vendors, lens manufacturers, photo accessory companies, imaging software companies, online photo sharing services, print providers, and photo equipment retailers.

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Methodology

InfoTrends conducted primary and secondary research on the digital SLR market, including a review of published material, interviews with vendors, and an extensive end-user survey.

The survey was administered in the U.S. via Web-based questionnaire in September 2008 to a panel balanced to represent the age and gender mix of the general population. InfoTrends also contacted subscribers to *Popular Photography* and *American Photographer* magazines. The median time taken to complete the questionnaire was 12 minutes.

While the use of the Internet to conduct large surveys is common, it does have some biases. While overall Internet penetration is high (70%+), Internet users tend to be slightly younger than the overall population and have higher annual income levels. At the same time, however, respondents who complete surveys tend to be a little older since they are more likely to have free time in which to do so. A bias will also have been created by the inclusion of subscribers to *Popular Photography* and *American Photographer* magazines, since subscribers of these publications are more likely to own a digital SLR than the population in general. All data pertaining to digital SLR owners is not skewed since the primary purpose of this survey was to gain a better understanding of digital SLR owners.

It is also important to note that the survey respondents are self-selected. Invitations were sent randomly to thousands of households explaining the nature of the study and asking people to participate. Respondents were offered a nominal financial incentive to complete the survey. Past experience suggests that people who have an interest in the topic are more likely to participate than people that have no interest. The potential impact is that incidence rates and usage rates may be slightly higher than the true population.

Of **6,238** usable responses, **631** (10%) said that they owned a DSLR. **925** respondents reported that they were planning to purchase their first DSLR in less than 12 months. Throughout this report, those groups of respondents will be referred to as “DSLR owners” and “Future owners” respectively.

All respondents were asked a series of demographic profile questions, while digital camera owners were asked questions relating to photo activities, storage and back-up, memory cards, printing, and software. There were two questions that were used to determine whether respondents qualified as a DSLR owner. Q15 asked which types of camera the respondents owned. Respondents who selected any DSLR option were asked Q36 (“How many DSLR bodies do you own?”). 100 respondents answered that they owned zero (0) digital SLR bodies and were therefore excluded from the digital SLR owners section.

The 631 DSLR owners were asked a series of questions relating to their digital SLR ownership:

- Purchasing motivation
- Type of camera purchased
- Factors that influenced the purchasing decision
- Camera brand and model, features, and price
- Accessory ownership
- Additional lens ownership

155 digital SLR owners and 925 non-owners indicated that they were planning to purchase a digital SLR in the coming year. These respondents answered a series of questions relating to their future purchasing intentions:

- Inadequacies of current camera
- Amount expected to spend
- Brand and model preferences
- Feature preferences
- Purchasing location and sources of information that will influence the purchasing decision
- Product attributes
- Interest in video clip capture

From this primary and secondary research, InfoTrends generated supporting data tables, charts, and a market forecast that are used in this report. Responses have occasionally been broken down by gender, age, type of photographer, and other demographic factors.

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