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InfoTrends is the leading worldwide market research and strategic



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. Additional information about InfoTrends is available on the Web at www.infotrends.com.

The Consumer Digital SLR Marketplace: Identifying & Profiling Emerging Segments

- Consumer perspectives



- Feature requirements



Prospectus

Introduction

The digital camera market is reaching the mature stage in its product life cycle. Point and shoot (P&S) cameras are headed toward commodity status and are under constant price pressure, while digital SLRs (DSLRs) are emerging as an area of growth within the industry. Once relegated to professional photographers or serious hobbyists, DSLRs have come down in price over the last several years, making them affordable to a greater number of people and attractive to those who never would have purchased a film DSLR.

Although DSLRs are more expensive than P&S cameras, InfoTrends expects that DSLR owners will replace their camera body after a shorter length of time than film SLR owners did. New technology and lower prices will contribute to a buoyant DSLR market in the coming years. Because DSLR owners buy into a system of lenses, vendors that can win the support of first-time DSLR buyers will secure future revenue streams from body upgrades and purchases of additional lens and accessories.

As the market continues to grow, players in the market must obtain a better understanding of the attitudes, desires, and purchasing decision drivers of DSLRs users and potential buyers. Digital SLR owners exhibit many unique attributes, such as the fact that they are more active photographers than other digital camera owners. This study will explore the drivers of photo activity among DSLR owners as well as the services and products they use and anticipate using in the future. Companies vying for a leadership position in the consumer digital SLR marketplace will benefit directly from the findings of this study. Players in the space include:

- Digital SLR camera companies
- Lens manufacturers
- Photo accessory companies
- Imaging software vendors
- Online photo sharing services and print providers
- Photographic equipment retailers

The coming 18 months will be critical for companies in the DSLR market that want to hook consumers into their system and reap the benefits from future upgrades. This study coincides with a DSLR market that is at the cusp of moving from the early adopter stage to the early majority stage and will provide vendors with timely and actionable information. It will provide a complete understanding of today's consumer digital SLR owner and what may be in store for the future.

Scope

The study will focus on the U.S. consumer digital SLR marketplace. InfoTrends estimates that over 2 million digital SLRs were sold in the U.S. in 2007, and continued growth is forecasted. Distinct consumer segments within this market will be identified and profiled as part of the study.

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Project Objectives

InfoTrends has been surveying the consumer digital camera market for the last 10 years and will leverage existing information and insights on DSLR owners as well as on segments that are most likely to purchase a DSLR. The study will provide camera, lens, accessory, and photographic equipment retailers with critical information to support their marketing efforts and product planning and distribution initiatives. Key information objectives include:

- Demographic profiling of DSLR owners
 - o Gender, age, technology adoption, type of photographer
- Examination of digital photo activities
- Obtain insight into feature requirements
- Determine purchase decision criteria
- Identify accessories owned
 - o Lens, speedlights, etc.
- Size, segment, and forecast the market by price band
 - o Units
 - o Revenue
- Gain a better understanding of how DSLR owners add value to the digital imaging market through their use of related services and technologies
- Determine the impact of the entry of new brands and whether earlier brand ownership impacts future purchase decisions
- Identify opportunities and strategies for technology vendors and service providers

Market Research

Desk Research

InfoTrends has conducted extensive consumer research studies over the last 10 years. Relevant InfoTrends research reports* that we can leverage as part of this study include:

- U.S. Digital Camera End User Studies (2007, 2006, 2005)
- U.S. Digital Photo Printing Studies (2007, 2006, 2005)
- U.S. Online Photo Services Studies (2008, 2007)

*Reports based on large structured surveys.

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InfoTrends will also thoroughly examine existing market information from a variety of sources including but not limited to:

- Industry trade associations
- Published industry reports
- Periodicals and trade articles
- User groups
- Web sites
- Industry databases
- Vendor white papers

Structured Survey with Digital SLR Owners (500 respondents)

InfoTrends will conduct a structured survey with up to 500 digital SLR owners in the U.S. (as well as potential buyers) to better understand their behaviors, needs, and wants. The survey will look at what photographic equipment, accessories, and software they own, what their current photographic behaviors are, what services they use, and what their future purchasing plans are.

In-Depth Interviews with Industry Vendors

InfoTrends will conduct a series of in-depth interviews with executives representing leading technology vendors (camera, accessory, software) and service providers. The goal of the interviews will be to understand their market positions, development directions, and perspectives on how the market will evolve over the coming years.

Analysis and Project Deliverables

Extensive analysis of the desk research and structured survey work will be used to develop a comprehensive understanding of the opportunities and issues for equipment, software, and service providers. Clients will receive a combination of reports, presentation material, and research data for senior management, product managers and planners, and sales and marketing executives. The material will include:

- Executive summary report that addresses key issues, findings, forecast assumptions and trends, and overall recommendations.
- DSLR forecast by price segment.
- Presentation-style power point slides with comments on research findings, market trends, and strategy recommendations.
- Data book of the survey tabulations for additional analysis of key questions and market segments.

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Project Schedule

InfoTrends intends to start the project in July 2008. We plan to complete the research by August and to publish the report in October 2008. We will provide clients with interim data from the structured surveys as the research is completed.

Project Fees

The participation fee is \$14,995 (USD) before June 30th. After June 30th, the participation fee is \$15,995 (USD). An optional personal presentation is available for \$2,000 plus direct travel expenses (if an on-site visit is required).

Terms and Conditions

Liability for Advice

Although reasonable efforts will be made by InfoTrends to ensure the completeness and accuracy of the information contained in written and oral reports in connection with the proposed study, no liability can be accepted by InfoTrends for the results of any actions taken by the client in connection with such information, opinions, or advice.

Copyrights

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Confidentiality

InfoTrends will use its best efforts to ensure that any confidential information obtained about the client and its business during the course of the proposed study is not, unless agreed otherwise in advance, disclosed to any third party without the prior written permission of the client. InfoTrends retains the right to re-use any non-proprietary information as part of its ongoing analysis of the office automation and printing and publishing industries.

Timely Delivery

InfoTrends will take all reasonable steps to ensure that the time scales called for by the proposed study are met in accordance with the agreed-upon schedule, but no liability can be accepted for the consequences of delays, howsoever caused.

Terms

InfoTrends invoices the first half of the fee upon initiation of the contract and the second half upon delivery of the report.

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Authorization Form

The Consumer Digital SLR Marketplace: Identifying & Profiling Emerging Segements

For more information on the study or how to order, please send an e-mail to sales@infotrends.com.

Please enter my order as follows (fax completed form to +1 781 616 2121):

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