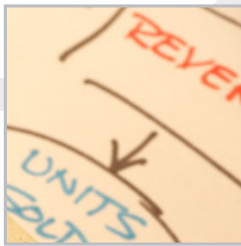


## Social Photo and Video: The New Communication and Memory-Keeping Paradigm



Consumer & Professional Imaging





## Social Photo and Video: The New Communication and Memory-Keeping Paradigm

### Introduction

Considerable data is available on consumers and their photo and video behaviors, including the kinds of cameras they use; the number of pictures they take; the amount of video they shoot; how, where, and with whom they share; and how, where, and how much they print. Yet comparatively little is known about the motivations for those behaviors, the reasons for the choices that they make, and what influences their daily photo activities.

Today's consumers are likely to own multiple cameras and other devices that can take pictures and shoot video. Long after the purchase decisions, they make a number of choices (conscious and unconscious) every time they use any of those devices to communicate, share moments, or preserve memories with family and friends.

Their choices span the spectrum of the imaging ecosystem, including capture, viewing and sharing, storage, creative projects, and output. Their preferences may be well established, but may change frequently, depending on occasion, location, or even mood. They are influenced by a variety of factors – some technical and others decidedly not – that include image quality, convenience, spontaneity, social setting, connectivity, privacy concerns, and more.

This study uses a combination of research methods to consider consumer behavior along the imaging continuum:

#### **CAPTURE**

- Which capture device(s) to use? In what situations? Why?
- What is more important (and when) – quality, convenience, speed, etc.?
- How many pictures do I take?
- How much video do I shoot?
- Am I capturing to share or capturing to keep? Does that change my behavior?

#### **VIEWING/EDITING/SHARING**

- Which photos and videos do I choose to share? Why? How? With whom?
- Do I want to add social context (tags, locations, descriptions), humor, pride, or emotion to my photos and videos?
- Will I tweak/manipulate/edit before I share?
- How and where will I view my photos and video? On my phone or camera? Tablet? TV? Online?
- Can and will others share related content in the same venue?



## STORAGE

- Where will I store my photos and videos? Why?
- Does my behavior vary by device type?
- How long will I need them to be stored?
- What are the biggest challenges related to back-up and storage?
- Does my storage solution provide automatic backup or synchronization between devices?
- What about privacy concerns?

## CREATE/PRINT

- Which photos get printed? How soon? Why? Where (online, retail, home)?
- For whom are basic photo prints made?
- Does a printed photo still hold emotional value?
- Will I make custom photo products? For whom? Why?
- What about digital creative options? When and why will I choose a digital option?
- Are there generational differences?
- Which types of consumers are likely to reignite the creative output/printing market, and why?
- What are consumers unmet printing needs?

## Project Objectives

This study provides vendors and service providers with information to help them understand how to influence consumers and their imaging choices, as well as the products and services that will help satisfy consumers' unmet needs related to photo and video expression. It considers where revenue opportunities may lie, and how vendors can remain relevant in both digital and print worlds.

It also examines key questions such as:

- What motivates digital expression?
- What would make consumers capture, share, and print more?
- Are there friction points that are restricting activity?
- How are consumers storing/curating/retrieving old images?
- Are there common pathways for photos?
- Are there common pathways for videos?
- Which scenarios are most frequent?
- How do they vary by demographic, device type, etc.?



## Market Research

This study is based on extensive primary consumer research. InfoTrends leverages its in-house imaging research where possible, and built on existing insights. The research for this study includes consumer intercepts, a structured Web-based survey, and a consumer diary study (in that order).

### Consumer Intercepts

InfoTrends conducted individual 5-10 minute interviews with 27 randomly selected consumers in prime photo and video taking locations, asking them questions about their current imaging experience, next-step plans for sharing/printing/etc., and photo preferences and habits. Careful attention was paid to why they are doing what they are doing. Intercepts were done in a mix of metro and suburban areas. InfoTrends used its current research on occasion-based imaging activity to select the appropriate mix of locations.

### Consumer Web-based Survey:

InfoTrends conducted a structured web-based survey of U.S. consumers, with just under 2,000 qualified participants age 13 to 79, balanced by age and gender to reflect the general U.S. population. This provided adequate sample sizes for users of various capture device types and various services (social networks, online services, apps, etc.). Survey questions focused on the project objectives outlined above.

### Consumer Diary Study:

Following the completion of the Web-based survey, InfoTrends conducted an online and mobile diary study with 25 consumers over the course of 30 days. This study was shaped by the results of the Web-based survey, exploring some of the same topics in greater depth and in a more qualitative manner. Prior to participation, respondents were screened through a short web survey. Half of the participants were under 30, and they all shot photo and video regularly.

## Analysis and Project Deliverables

There was extensive analysis of all research to develop a comprehensive understanding of the opportunities and issues for vendors/service providers in the social photo and video space. Clients receive the following:

- Written report detailing key findings with recommendations
- PowerPoint summary slides
- Data cross-tabulations from the consumer survey for additional analysis of key market segments
- Excel and PDF summaries of the consumer intercept work
- Transcripts and participant profiles for the online diary study work

## Project Schedule

InfoTrends began this project in January of 2014. The project was completed with material distributed at the end of April 2014.

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Although reasonable efforts have been 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.

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## About InfoTrends

InfoTrends is the leading worldwide market research and strategic consulting firm for the imaging, document solutions, production print, and digital media industries. We provide insights and advice to help clients understand market trends, identify opportunities, and grow their business.

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