

**Headquarters**

**U.S.**

Libbey Industrial Parkway  
Weymouth, MA 02189  
USA  
+1 781 616 2100  
info@infotrends.com

**Europe**

Sceptre House  
7-9 Castle Street  
Luton, Beds LU1 3AJ  
United Kingdom  
+44 1582 400120  
euro.info@infotrends.com

**Asia**

Hiroo Office Building  
1-3-18 Hiroo Shibuya-ku  
Tokyo 150-0012  
Japan  
+81 3 5475 2663  
info@infotrends.co.jp

*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. Additional information about InfoTrends is available on the Web at [www.infotrends.com](http://www.infotrends.com).*

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## **E-Business Enablement: The Future of Professional Photography**

- Photographer and Consumer Perspectives
- Business Drivers & Models
- Critical Services & Pricing
- Content to drive marketing efforts, product planning, workflow management, and distribution initiatives
- Market Size & Forecast

# Prospectus

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## Who Should Subscribe?

- *Web services companies providing e-commerce, workflow, operations management, fulfillment, or marketing services to the pro market*
  - *Independent software vendors*
  - *Imaging hardware manufacturers*
  - *Printing / Photofinishing service providers*
  - *Commercial and professional labs*
  - *Online photo sharing services*
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## Introduction

The electronic (“e”) enablement of business processes related to creating, marketing, selling, buying, and producing photographic services is changing the normal order of the professional photography value chain. Just as professional photographers modified their work processes around digital technologies, many are finding opportunities to re-orient their businesses around Web-based business services.

The market for these services, however, has moved sporadically over the past several years as professional photographers have been struggling to figure out how to e-enable their business. Pro photographers are asking many questions including:

- Will these services help grow my business?
- Does implementing them make sense financially?
- Which service provider(s) are right for my business?
- How can I leverage new technologies to outsell my competitors?
- What has been the experience of other photographers?

There are also many companies vying for the leadership position in the pro photography e-business services market. Each firm has a different value proposition, pricing model, and market focus. InfoTrends anticipates that there will be some consolidation over the next few years as companies seek to achieve economies of scale, round out their service offerings, and expand into other market segments.

Players in the space include:

- Pure-play Web services companies
- Online photo sharing and print providers
- Independent software vendors
- Commercial and professional labs

As pro photography Web-based business services become mainstream, InfoTrends expects significant changes driven by market expansion, business development, product innovation, multimedia advances, and workflow integration. We believe it is time to perform an in-depth assessment of the changes that have taken place and the benefits that have resulted from those changes and, with the help of our clients, determine what course the industry will take in the future.

This new study, *E-Business Enablement: The Future of Professional Photography*, will provide a complete understanding of the impact that e-business is having on today’s market and the effects that it will have in the future. It will provide context and direction setting for a broad spectrum of market players, including pro photographers, service providers, equipment suppliers, and solution participants across the industry value chain.

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## Scope

The study will focus on the North American professional photography industry. Within this industry, there are over 20,000 professional photography establishments (excluding many advanced hobbyists and part-time professionals) in 10 major market segments. Each segment has different business drivers, workflows, and service requirements. To provide the level of depth that our clients require, InfoTrends will be focusing on pro photographers that specialize in the following four major segments:

- Portrait
- Wedding
- Events, sports
- School

## Project Objectives

InfoTrends has been surveying the professional photography market for the last five years and plans to leverage information and insights from previous studies in the development of this new research project, in addition to gathering new content. The study will provide camera, printer, software, supplies, and service providers with critical information to support their marketing efforts, product planning, and distribution initiatives. Key information objectives of the study include:

- Profile pro photographers and their use of Web services
  - o Type of photography, volume, demographics, business attributes
  - o Use of cameras, client-based software
  - o Awareness of providers and usage of services
  - o Experiences and perceptions and loyalty to services
  - o Concerns, questions, issues
  - o Perceptions of pricing models
  - o Percentage of prints ordered via the Web (proofs vs. final) vs. in-house, traditional lab, or at retail
  - o Criteria for outsourcing prints
  - o Variations in behavior based on sizes and types of prints
  - o Other product offerings (albums, books, etc.)
- Unmet needs and areas of interest
  - o Design, editing, and creative tools
  - o Print ordering systems
  - o Integration with other products (cameras, software)
  - o Collaboration
  - o Affiliates
  - o Licensed content
  - o Rights management
  - o Digital asset management, archiving
  - o Color correction

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- o Prints and related products
- o Marketing, business development
- o Business management (scheduling, quoting, accounting, etc.)
- Identify and profile leading service providers
  - o Target markets
  - o Services
  - o Partners
  - o Business models
- Size and forecast the North American market for Web services
  - o Number of photographers by category
  - o Revenue by service area
- Identify opportunities and strategies for technology vendors and service providers

## Market Research

### Desk Research

InfoTrends has conducted extensive research with technology vendors, professional photographers, and consumers over the last 24 months. Relevant InfoTrends research reports\* that we can use as part of this study include:

- North American professional photography studies (2007, 2006, 2005)
- Digital photo printing studies
- Wide format printing and professional photographer survey

\*Reports based on large, structured surveys.

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
- Government statistics
- Industry databases
- Vendor white papers

### In-Depth Interviews with Industry Vendors

InfoTrends will conduct a series of 15 in-depth interviews with executives from leading service providers and technology vendors (camera, software). The purpose of the interviews will be to gain an understanding of service positioning, development directions, and a perspective on how the market will develop over the coming years.

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## **In-Depth Interviews with Professional Photographers**

InfoTrends will conduct 15 in-depth interviews with professional photographers across the target industry segments. We will focus on photographers that have experience e-enabling their business. The purpose of these interviews will be to identify critical operational issues, understand business challenges, assess the impact on their business, identify new service requirements, and provide input for the structured survey.

## **Structured Survey with Professional Photographers (900)**

Following the in-depth interviews, InfoTrends will conduct a structured survey with approximately 900 professional photographers in North America across the target segments. The survey will garner critical insights into awareness, perceptions, adoption rates, usage patterns, implementation plans, impact on business, priorities, unmet needs, and interest in new services. InfoTrends will look for a cross section of experience levels and ages among survey respondents.

## **Structured Survey with Consumers (1,700)**

InfoTrends will conduct a structured survey with approximately 1,700 consumers to obtain a better understanding of their use of professional photographers as well as their interest in using the Web to find photographers and conduct business with them (scheduling, ordering, designing, viewing, ordering, and related issues). The survey will examine how much households are spending annually on pro photography services, how they are allocating their dollars, and what types of products they are buying (prints, gifts, novelty items, etc.).

## **Analysis and Project Deliverables**

We will conduct extensive analysis of the desk research, in-depth interviews, and structured surveys to develop a comprehensive understanding of the opportunities and issues for technology vendors 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 materials will include:

- Executive summary that addresses key issues, findings, and overall recommendations.
- Presentation-style overheads 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. (optional)

## **Project Fees**

The participation fee is \$7,995 (US) for the summary report and presentation slides. The detailed data tabulations are available for an additional fee of \$1,495. An optional personal presentation is available for \$2,000 plus direct travel expenses (if on-site visit is required).

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## 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

One half of fee upon initiation and one half upon report delivery.

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## Authorization

### E-Business Enablement: The Future of Professional Photography

For more information on the study or how to order, please send an e-mail to [sales@infotrends.com](mailto:sales@infotrends.com).

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

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