Abstract

This document provides an analysis of the results of InfoTrends' 2007 Digital Camera End-User Study. In conducting this study, InfoTrends surveyed 1,272 U.S. Internet-connected households during October 2007. This report examines Internet users' digital camera ownership, usage, and applications, and it investigates the changes that have taken place among consumer digital photographers since our previous study.

About InfoTrends

InfoTrends, a Questex Company, is the leading worldwide market research and strategic consulting firm for the digital imaging and document solutions industries. We provide research, analysis, and advice to help clients understand market trends, identify opportunities, and develop strategies to grow their businesses. To learn more about our company, visit www.infotrends.com.

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Introduction

Since 1997, InfoTrends has been conducting end-user surveys to track the adoption and usage of digital cameras. Behavior is not always predictable, so a useful part of this research is tracking how the market changes from year to year as a result of new products, prices, and increased consumer awareness. Our research indicates that digital cameras now represent a mainstream technology that has largely replaced the role of the traditional point-and-shoot film camera to preserve memories. Staying abreast of industry trends is critical to any vendor’s marketing plan.

This study considers the ways in which user demographics are changing, emerging subsegments that should be targeted, and what people do with their digital photos. As appropriate, we will also compare the results from our 2007 survey to the results from our previous surveys to gain a greater understanding of how this market is changing as time goes on.

Methodology

This study represents InfoTrends’ ongoing efforts to track the developments in the U.S. digital photography market. The survey was conducted via the Web from October 25-30, 2007. 1,272 qualified responses were received, and 864 of these qualified respondents were digital camera owners. It should be noted that much of the information from this study was obtained only from the digital camera owners rather than the entire pool of qualified respondents. All respondents were 18 or older and resided in the United States.

The mailing list that we used was supplied by Survey Sampling, which maintains a balanced panel of Internet users. The Internet user panel was selected because it mirrors the demographics of the general population of Internet users.

Respondent Demographics

This section presents the demographic information of those survey respondents who reported owning digital cameras. Characteristics such as age, income, gender, and attitude toward technology can be useful when considering how subgroups compare to total respondents.

Technology Ownership

The Figures in this section show the household penetration of consumer electronics, communications, and computer appliances for digital camera owners in our 2006 and 2007 surveys. It is important to note that in this question, respondents were asked about ownership within their overall households. Responses would likely have been different if we had asked respondents to indicate the technologies that they owned personally.

Digital Photo Frames

The digital camera owners that responded to our survey were also asked a series of questions about digital photo frames. Although digital photo frame owners continue to represent a small share of the total market, they are interesting to consider in their own right. Consumers who own digital photo frames tend to be
more tech-savvy, and they also tend to have a genuine interest in digital photography (meaning that they are often early adopters, hobbyists, or both).

**Activities Performed with Digital Photos**

Our survey participants reported conducting a number of activities with the digital photos that they captured for personal use. Only 8% of respondents indicated that they did not conduct any activities, which presumably means that 92% of survey participants partake in some viewing, sharing, printing, or editing activities.

**Complaints about Current Camera**

64% of our survey participants reported no problems with their current cameras, up from 58% in 2006. The fact that the majority of consumers are happy with their digital cameras can be seen as a double-edged sword. While it is good that today’s cameras meet consumers’ needs, this level of contentment may hamper replacement or upgrade purchases. In addition, longer replacement cycles will result in fewer repeat buyers in the market and lower overall sales volumes.

**Non-Digital Camera Owners**

This section of the study focuses specifically on the habits and perceptions of non-digital camera owners. These respondents account for only a small proportion of our overall survey pool, but some of their responses were illuminating.