

September 18, 2008

Abstract

Spotlight on Moms: Western European Digital Photography

Report Fast Facts

Published: September 2008

Pages: 54

Tables & Figures: 49

Price: \$3,500

Order Information

To place your order today, contact Michelle Boczanowski at 781.616.2100 or via e-mail michelle_boczanowski@infotrends.com

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.

© 2008 InfoTrends, Inc.
www.infotrends.com

Abstract

This document takes a closer look at the results of InfoTrends' 2008 Western European Digital Photography survey, focusing on mothers (females between the ages of 25 and 44 with children under age 12). It examines how this important consumer segment interacts with digital cameras, camera phones, digital photo frames, and photo printing. Where appropriate, moms' behaviours are also compared to those of the total survey population.

For More Information

If you would like to order extra copies of this report, receive permission to use any part of the report, or be informed of upcoming market updates, reports, and related projects, please e-mail us at info@infotrends.com.

Headquarters:
97 Libbey Industrial Parkway
Suite 300
Weymouth, MA 02189
United States
+1 781 616 2100
info@infotrends.com

Europe:
3rd Floor, Sceptre House
7-9 Castle Street
Luton, Bedfordshire
United Kingdom, LU1 3AJ
+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

Table of Contents

| | |
|---|-----------|
| Key Findings | 4 |
| Executive Summary | 4 |
| General Findings by Country | 5 |
| Camera Phones | 5 |
| Digital Cameras | 6 |
| Digital Photo Frames | 6 |
| Photo Merchandise | 6 |
| Introduction | 7 |
| Methodology | 7 |
| Sources of Skew | 7 |
| Mean vs. Median | 8 |
| Banner Point Definitions | 9 |
| Survey Findings | 10 |
| Demographics | 10 |
| <i>Country of Residence</i> | 10 |
| <i>Age</i> | 11 |
| <i>Household Income</i> | 12 |
| <i>Marital Status</i> | 13 |
| <i>Presence of Children</i> | 14 |
| Ownership of Technologies | 15 |
| <i>Approach to New Technologies</i> | 15 |
| <i>Camera Ownership</i> | 16 |
| Camera Phones | 17 |
| <i>Features Included in Camera Phone</i> | 17 |
| <i>Brand</i> | 18 |
| <i>Number of Camera Phone Photos Captured</i> | 19 |
| <i>Percentage of Camera Phone Photos Printed</i> | 20 |
| <i>Percentage of Camera Phone Photos Saved</i> | 21 |
| <i>Percentage of Camera Phone Photos Shared or Uploaded</i> | 22 |
| <i>Where Camera Phone Photos are Printed</i> | 23 |
| Digital Cameras | 24 |
| <i>Type of Photographer</i> | 24 |
| <i>Frequency of Use</i> | 26 |
| <i>First, Replacement, or Additional Camera?</i> | 27 |
| <i>Reason for Purchasing a Digital Camera</i> | 28 |
| <i>Duration of Ownership</i> | 29 |
| <i>Amount Paid for Newest Digital Camera</i> | 30 |
| <i>Brand</i> | 31 |
| <i>Most Important Aspect of Digital Photography</i> | 32 |
| <i>Digital Photography Activities</i> | 33 |
| <i>Number of Digital Camera Photos Captured</i> | 34 |
| <i>Percentage of Digital Camera Photos that are Printed</i> | 35 |
| <i>Percentage of Digital Camera Photos Saved</i> | 36 |
| <i>Percentage of Digital Camera Photos Shared</i> | 37 |
| <i>General Photo Printing Activities</i> | 38 |
| <i>Photo Storage Activities</i> | 44 |
| Digital Photo Frames | 49 |
| <i>Ownership</i> | 49 |

| | |
|---|-----------|
| <i>How Frame was Obtained</i> | 50 |
| <i>Frequency of Updating/Adding Photos</i> | 51 |
| Photo Merchandise..... | 52 |
| <i>Percentage of Respondents Who Have Purchased Photo Gifts</i> | 52 |
| <i>Average Number of Photo Gifts Purchased</i> | 53 |
| <i>Reasons for Ordering Photo Merchandise</i> | 54 |
| Conclusion | 54 |

List of Figures

| | |
|--|----|
| Table 1: Camera Phone/Digital Camera Activity Rates – Total Respondents vs. Moms..... | 5 |
| Table 2: Banner Points | 9 |
| Figure 1: Which country do you live in? | 10 |
| Figure 2: What is your age? | 11 |
| Figure 3: What is your total household income? (Means)..... | 12 |
| Figure 4: What is your marital status? | 13 |
| Figure 5: Which age groups do the children living in your household fall into? | 14 |
| Figure 6: Which of the following best describes your personal approach to new technologies? | 15 |
| Figure 7: Which of the following type(s) of camera(s) do you own? | 16 |
| Figure 8: Which of the following features are included in your camera phone? | 17 |
| Figure 9: What is the brand of your camera phone? | 18 |
| Figure 10: On average, approximately how many camera phone photos to you CAPTURE every three months?..... | 19 |
| Figure 11: On average, approximately what percentage of your camera phone photos do you PRINT? | 20 |
| Figure 12: Approximately what percentage of your camera phone photos do you expect to SAVE in electronic form for at least a year? | 21 |
| Figure 13: What percentage of your camera phone photos do you share or upload in the following ways?..... | 22 |
| Figure 14: At which of the following locations have you printed camera phone photos?..... | 23 |
| Figure 15: Which of the following best describes you as a photographer? | 25 |
| Figure 16: How often do you use your digital camera? | 26 |
| Figure 17: Which of the following best describes your newest digital camera? | 27 |
| Figure 18: Was there a particular event that motivated you to purchase a digital camera? | 28 |
| Figure 19: How long have you owned your newest digital camera? | 29 |
| Figure 20: Approximately how much did you pay for your newest digital camera? | 30 |
| Figure 21: What is the brand of your digital camera?..... | 31 |
| Figure 22: What aspect of digital camera photography is the MOST important to you?..... | 32 |
| Figure 23: Which of the following activities do you conduct with the digital camera photos you capture for personal use?..... | 33 |
| Figure 24: Approximately how many digital camera photos do you TAKE every three months? | 34 |
| Figure 25: Approximately what percentage of your digital photos do you PRINT?..... | 35 |
| Table 3: Average Number of Digital Camera Photos Printed PER MONTH Based on Percentages .. | 35 |
| Figure 26: Approximately what percentage of your digital photos do you expect to SAVE in electronic form for at least a year? | 36 |
| Table 4: Average Number of Digital Camera Photos Saved PER MONTH Based on Percentages ... | 36 |
| Figure 27: Approximately what percentage of your digital photos do you SHARE with others? | 37 |
| Table 5: Average Number of Digital Camera Photos Shared PER MONTH Based on Percentages .. | 37 |
| Figure 28: Which of the following best describes your digital photo printing habits? (Total Respondents vs. Mothers)..... | 38 |
| Figure 29: Which of the following best describes your digital photo printing habits? (Mothers Only by Country) | 39 |
| Figure 30: How many digital camera photos does your household print every three months? | 40 |
| Figure 31: How many digital camera photos does your household print every three months? | |

| | |
|--|----|
| (Percentage of “Zero” Responses)..... | 41 |
| Figure 32: Approximately how many digital photos did you print using each of the following methods over the past 3 months? | 42 |
| Figure 33: Where do you print digital photos most often? (By Age of Children) | 43 |
| Figure 34: Where do you print digital photos most often? (By Country) | 43 |
| Figure 35: How are you currently storing your digital camera photos? | 44 |
| Figure 36: What is your plan for storing your digital photos for the long-term (beyond one year)? | 45 |
| Figure 37: Approximately how many photos do you have stored on your PC and/or other storage devices?..... | 46 |
| Figure 38: Have you created a backup of your photos to safeguard against computer crashes or viruses? | 47 |
| Figure 39: When is the last time you created a backup of your photos? | 48 |
| Figure 40: How did you obtain your digital photo frame(s)?..... | 50 |
| Figure 41: How often do you update/add photos to your digital photo frame? | 51 |
| Figure 42: Percentage of Respondents Who Have Purchased Photo Merchandise | 52 |
| Figure 43: How many of each of the following types of photo gifts have you purchased in the past 12 months? | 53 |
| Figure 44: Why did you order photo gifts with your own images as content? | 54 |

Introduction

InfoTrends conducted its first survey of the Western European consumer digital photography market in 2003, and the industry has evolved considerably since that time. Digital cameras have become commonplace within families, whilst camera phones are highly individual devices. In some cases, every family member within a given household will have their own mobile phone, and an embedded camera has become a standard feature. InfoTrends has observed that mothers with children living at home tend to differ from the population in general in terms of their digital photography habits. To obtain a better understanding of the digital photography habits of Western European mothers, InfoTrends created an additional data cut of its 2008 Western European Digital Photography survey with a banner for mothers between the ages of 25 and 44. Where appropriate, we will also provide direct comparisons between the entire survey pool and those respondents who qualified as mothers of children under age 12 to further illuminate the differences between these two groups.

As this document will show, mothers can represent a lucrative segment for camera phone, digital camera, digital photo frame, and photo merchandise vendors. The key is understanding the demands of these mothers, and this document provides some valuable insight on what moms are seeking.

As time goes on, InfoTrends will be publishing additional surveys on moms to cover other areas of the industry. Please contact your account representative if you have any questions or need additional information.

Methodology

This document focuses on a specific portion of the data from our 2008 Western European Digital Photography survey, which was conducted via Web-based questionnaire in various regions of Western Europe in April 2008. Of the 3,003 total respondents to that survey, 324 were identified as mothers between the ages of 25 and 44 with children under age 12 living at home. Their responses are examined in this report to develop a clearer understanding of how moms interact with different aspects of the digital photography market.

The survey panel for the study was provided by Survey Sampling International (SSI), which maintains a panel of home Internet users that has been balanced by age and gender to represent the general population.

Please see our previously published 2008 Western European Digital Photography survey and accompanying data tabulations for a more comprehensive study of the digital photography market in Western Europe.

This material is prepared specifically for clients of InfoTrends, Inc. The opinions expressed represent our interpretation and analysis of information generally available to the public or released by responsible individuals in the subject companies. We believe that the sources of information on which our material is based are reliable and we have applied our best professional judgment to the data obtained.