TRENDS IN THE PHOTO AND IMAGING MARKET

photokina 2012
PHOTO AND IMAGING MARKET

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PHOTO AND IMAGING MARKET - GERMANY

Prophoto GmbH and GfK Retail and Technology GmbH jointly observe and publish data and facts on developments of the photo and imaging market in Germany. In agreement with market researchers from photo and imaging companies, the data and facts published here by Prophoto GmbH are condensed into a single annual figure, with distribution channels not covered by GfK being added. This brochure describes the photo and imaging market with a strong focus on the consumer market for private and semi-professional requirements.

PHOTO AND IMAGING MARKET – EUROPE & WORLD

In close coordination with GfK, Prophoto GmbH publishes data and facts on the photo and imaging markets in Europe and worldwide, enabling a comparison with the photo and imaging market in Germany. This brochure contains excerpts with information on European and global photo and imaging markets. A topical and comprehensive overview is available on the homepage:

www.prophoto-online.de

CONSUMER ANALYSES BY PROPHOTO GMBH

Consumption forecasts are much more accurate where they are supported by consumer surveys, with the latter also giving details on use behaviour. Since 2009 Prophoto GmbH has been annually implementing online consumer analyses regarding the German photo and imaging market. Large numbers of respondents ensure the good information value of the results. Furthermore, in 2012 Prophoto GmbH has taken up a new role as a service provider: now Prophoto GmbH conducts online consumer surveys also for companies. In this way, companies benefit from the know-how of Prophoto GmbH in surveying photo-loving target groups.

GROWTH SECTOR PHOTO AND IMAGING – RISING NUMBER OF CAPTURING DEVICES GLOBALLY

When including camera mobile phones, smartphones and camcorders, over 4.4 billion capturing devices are currently being used globally. Europe has a share of nearly one billion devices in this total. Further growth in capturing devices is expected in the years to come – for smartphone alone, analysts predict for 2012 a global increase by 50 percent to 700 million units, as well as 20 million units for Germany. There are also tablets with global sales of 70 million units in 2011. Analysts forecast global sales of up to 300 million tablets in 2015. Sales of some 3 million tablets are anticipated for 2012 in Germany. This corresponds to an increase by 110 percent as compared with 2011.
COMPACT SYSTEM AND SLR CAMERAS – STRONGER DEMAND WORLDWIDE

A stronger demand worldwide is observed for single lens reflex (SLR) and compact system cameras. Both camera systems are not competing with each other, except in Japan. Analyses show that those consumers who purchase compact system cameras mostly used to take pictures with compact cameras or mobile/smartphones.

In some countries and especially in China, camera mobile phones and smartphones are the competitors of favourably priced compact cameras. The situation is similar in other Asian countries and in the Pacific region. By contrast, in Europe camera mobile phones and smartphones are not yet quite so much competing with favourably priced compact cameras.

Action cams – a quite new species with enormous growth potential – are a valuable and lasting addition to the camera market. It is assumed that 150,000 action cams are being sold in Germany, corresponding to an increase by 400 percent over 2011.

ACCESSORIES – MORE DIVERSE THAN EVER BEFORE AND WITH SUSTAINED GROWTH POTENTIAL

Lenses, flash units, tripods and heads, filters, photo bags and backpacks – as well as software products – are frequently purchased, also because of the persistently strong and further rising demand for compact system and SLR cameras. The accessories business is on a very high level with sustained growth potential, triggered inter alia by smartphones, tablets, action cams and camera features such as the video function. Furthermore, sales are positively impacted by the consumers’ wish to bring their photo equipment in an ever more professional shape.

PICTURE OUTPUT – MULTI-FACETTED AND POPULAR

In the days of analog photography, picture output was limited almost exclusively to paper prints. Today, digitalization opens up myriads of new options for consumers. Products like personal photo books, tablets, pocket projectors or cameras with integrated projectors stimulate the photo and imaging market – just like photo posters and lamination under acrylic glass, on hard foam boards, Alu-Dibond or canvas, individual photo wallpapers, photos on foils for mobile phones and notebooks or, for example, photo tiles for kitchens and bathrooms as well as personalized photo neckties or photo blinds.

Moreover, there is a wide choice of photo fun products – ranging from snow globes, personal photo calendars and greeting cards to bed linen with a very personal touch through prints of own images. FineArt and large format prints are another growth market where the quality of photos is highlighted. Paper manufacturers of FineArt media are increasingly targeting smartphone photographers and their uses of photo apps by offering suitable paper sizes.

MOBILE IMAGING – A CENTRAL TOPIC OF THE FUTURE

With the much higher demand for smartphones and given the fact that cameras are literally getting smarter, mobile imaging is entering a new dimension. Growing numbers of modern cameras enable the wireless exchange of images with other mobile devices, direct upload of images on the computer hard drive, display on television screens, wireless or computerless transfer of images to social media or in the cloud. Now photographers are free to explore a whole new world. Connecting with photo printers or kiosk systems does not need any plugging-in, either. For the photo and imaging industry, mobile imaging means new services with stronger sales potential.
INTERACTIVE IMAGING WORLD

Breathtaking developments in technologies for the shooting of photos and videos—and their viewing, processing, management, storage and sharing—continually expand the scope of the photo and imaging world. Technical progress brings novel products and services with changing consumer habits in the use of photos and images and, consequently, changing markets for the photo and imaging industry. This leads to new economic trends with extra value creation.

CONNECTIVITY – THE REVOLUTION IN IMAGE COMMUNICATION

Connectivity is another proof of the innovative strength in the photo and imaging industry: connectivity is the revolution in global image communication and takes it into new dimensions. But new business fields, too, will become firmly established in this sector and enhance it. At present, connectivity is of special importance—and increasingly the state-of-the-art—in cameras, mobile/smartphone cameras, tablets and television sets.

New possibilities of image and video communication are real milestones. The world would stand still without photo and imaging. This holds true not only for consumer-oriented image capturing devices but also for imaging technologies which, for example, permit quality assurance testing in the inaccessible interior of machinery, provide photos from far-away galaxies, enable telediagnosis across continents or help trace missing persons in rough terrain. Connectivity between all these types of imaging and the swift and easy exchange of images worldwide are characteristic of the current trend in photo and imaging technologies and, at the same time, connectivity and image exchange are among the major drivers of these technologies.

PHOTO AND IMAGING – ESSENTIAL AT THE WORKPLACE

Digitalization brings a more intensive use of photography not only in the private sphere; photography is also the medium of documentation for many trades and professions, e.g. architects, craftspeople, physicians, archivists, urban planners, police forces or zoologists. Photo and imaging in combination with their manifold possibilities are today indispensable to numerous occupations.

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PROFESSIONAL MARKET – ADDITIONAL SALES POTENTIAL

With progressing digitalization and many choices in photo and imaging, the job profile of professional photographers has changed over recent years. The camera feature “video” alone provides a much broader basis for professional photographers and enables them to expand into new fields with good growth and sales potential. The wider range of options in image presentation brings new forms of value creation too. Some 20,000 professional photographers are estimated to work in Germany; their number has been constant for years.

A breakdown by percent shows that the groups of portrait, advertising and industry photographers and photojournalists are roughly equally sized. Around 1,000 professional photographers are thought not to fall in any of the above groups. The market volume from image capture to direct “post-production” exceeds three billion euros.

The downstream turnover in video production, image and video processing and the output of images is difficult to calculate and stretches to film-making, exhibition stand construction and advertising posters.
Also in 2012 apps – the practical mini-programmes for the nearly infinite expansion of functionalities of mobile IT, telecommunication and photo devices – remain a topical and trendy subject across the photo and imaging industry. Apps encourage the creativity of consumers and enhance their enjoyment of their own photos and videos. According to current research, there are over one million apps globally at present. Some 100,000 developers ensure fresh supplies: on average, each of them with 4.1 apps per year.

By far most of these small software programmes are available free-of-charge. This needs to be seen also together with the growing importance of android devices. The market research company Ovum states that sales achieved purely with apps totalled around four billion dollars in 2011. This market is forecasted to be worth 7.7 billion dollars by 2016. Up until then, Ovum predicts the number of downloads to reach the 45 billion mark – with the android platform accounting for twice as many downloads as Apple. Pursuant to Gartner (IT analysts and consultants) ca. 18 billion apps were downloaded in 2011 so that the number of downloads more than doubled from 8.2 billion back in 2010.

Apps certainly bring new business models. Sales come not only from the distribution of apps; they are also generated, for example, with advertising revenue and in newly arising submarkets around the actual solutions. In the development of apps, the focus is increasingly on concepts, project management, distribution, services and maintenance of mobile applications. The mobile market research company research2guidance believes that the market for mobile applications will have a size of 100 billion dollars by 2015. As regards Germany, sales in excess of 200 million euros can be assumed for 2011, with an increase by over 100 percent against the previous year.
For years the photo and imaging market has been reflecting the enormous value creation across the imaging workflow. The overall market in Germany – with its orientation to consumers and professionals – should have reached a volume of far more than 20 billion euros in 2011.

Furthermore, there is a large variety of novel photo and imaging services in the relevant sectors, e.g. cloud computing, social media, marketing of images, communities, living picture, apps and technical applications. They are difficult to precisely identify and put into figures, due to their diversity and heterogeneity. All in all, the above expresses the value creation potential of photo and imaging products. Some 70 percent of all this fell to the share of consumer-related photo and imaging.

Digitalization makes images the means of communication in our society and turns social media channels into a limitless world of pictures. Meanwhile, just the leading photo-friendly networks Facebook, Photobucket or flickr have over 160 billion photos globally.

In 2011 some 1.75 billion photos per week were uploaded globally on Facebook – tendency rising. Roughly one billion videos are watched daily on YouTube; 80 percent of them were shot with video-capable mobile phones. Around 60 percent of all photos on social networks come from smartphones and comparable products. This percentage is increasing rapidly.
Since 2004 annual sales of cameras are in excess of eight million units in Germany. With 8.6 million units sold in 2011, the German market remains on this very high level. Good sales are projected also for 2012 so that nearly every 10th consumer in this country is buying a new camera throughout any year. Technical innovation and the wish for more professional products rank among the main reasons why consumers prefer the latest digital cameras in their purchasing decisions.

In 2011 the value creation for cameras in Germany was three times as high as in 1981. This is attributable, firstly, to the doubled average price of over 200 euros in 2011 and, secondly, to the rise in volumes sold. Based on up-to-date analyses for 2012, a further increase in the average price can be assumed for the individual camera segments. For example, over the past twelve months the average price of single lens reflex (SLR) cameras went up from 633 to 700 euros; the average price of compact system cameras rose from 470 to 530 euros. So far, the average price of compact cameras has been constant at 150 euros.
SLR (880,000 units in 2010 / 970,000 units in 2011) and compact system cameras (80,000 units in 2010 / 130,000 units in 2011) are among the growth motors of the photo and imaging industry, also in Germany.

Another sales increase is likely in 2012. In a conservative projection, sales of SLR cameras are expected to improve by 1 percent to 980,000 units. Sales of compact system cameras should climb by 38.5 percent to 180,000 units.

If the number of market players – and with them the number of models in the field of compact system cameras – continue to grow, it cannot be excluded that 200,000 compact system cameras will be sold in Germany in 2012. A look back illustrates the dimension of both camera segments. Ten years ago, domestic sales of analog SLR cameras amounted to 280,000 units. Today, the total has risen to over one million digital cameras with interchangeable lenses. This is an impressive development which positively impacts the accessories market too.

The demand for compact cameras remains strong, even though a slight drop in sales is observed when comparing 2010 and 2011 (7.66 million and 7.47 million units, respectively). A further downturn is forecasted for 2012 due to the reduced demand for very low-priced compact cameras and so-called multimedia cameras. For the latter, a decline by 15.8 percent to 320,000 units was recorded already in 2011. Another fall in sales to 160,000 units is anticipated for the present year. Underlying reasons are the smaller diversity of models of multimedia cameras and the competition between these products and smartphones. By contrast, action cams – a quite young species – will lastingly enhance the camera market. Sales totalled ca. 30,000 units in 2011; it is not unlikely that 150,000 units are sold in 2012.

The resolutions of camera mobile phones and smartphones meet the requirements of modern photography. Therefore, they are included in photo and imaging surveys. These image capturing devices primarily serve for spontaneous snapshots, with this segment gaining young and new consumer groups.

Analyses show that camera mobile phones and smartphones do not compete with other image capturing devices, except for multimedia cameras, at the time being. The smartphone market is growing rapidly: sales rocketed from 2.9 million units in 2009 to 14.5 million units in 2011.
In Germany, sales totalling 20 million units are likely for smartphones in 2012. The rise of smartphones came with sales of camera mobile phones falling to 10.8 million units in 2011 (minus 26 percent). This downtrend will persist in 2012. In 2011 smartphones generated sales of 5.5 billion euros, reflecting an improvement by 104 percent over 2010 with 2.7 billion euros. In the present year, volumes will increase more significantly than value. Given the larger variety of models, stronger price pressure can be assumed. In 2011 sales of camera mobile phones declined, as compared with the previous year, by 50 percent to 0.8 billion euros.

Camcorders

Video is omnipresent. Mobile phones, digital or multimedia cameras – today no mobile image capturing device is without the ever more popular video function.

This impacts the classic market for camcorders, where adverse trends were observed in the fifth consecutive year: value and volume are developing negatively (392,000 units in 2011).

For 2012 another minor decline is expected both in terms of value and volume, irrespective of the strength for technological innovation in the classic camcorder segment.

Camera Market Globally

The global photo and imaging market has been on a very high level for many years. 140 million digital cameras were sold worldwide in 2011, i.e. there was a slight drop by three percent as compared with 2010. This was mainly due to natural disasters with the ensuing supply bottlenecks and delays in the introduction of novelty products. In a conservative forecast and taking CIPA reporting into account, global camera sales are expected to total 143 million units in 2012.

The focus worldwide is on SLR and compact system cameras: in 2011 they had a share of some 13 percent in digital camera sales across the world. Combined sales of both product types – SLR and compact system cameras – increased by nearly 20 percent in 2011 against the previous year. These products are headed for further growth in 2012.
ACCESSORIES ARE ON THE GROWTH PATH

The sales boom for digital cameras – and in particular for digital SLR and compact system cameras with interchangeable optics – brings extra purchases of accessories, such as lenses, flash units, tripods, filters, camera bags, chargers, canvas and image and video processing software.

Further growth drivers in this segment are the growing variety of products and the more intensive use of image capturing features, e.g. video and panorama functions. Moreover, consumers want more professional photo equipment.

SMARTPHONES, TABLETS AND ACTION CAMS

Smartphones, tablets and action cams are novel products with an entirely new accessories market for the photo and imaging industry – and with an enormous growth potential for the years to come. For example, special accessories are needed to attach action cams to helmets and bicycles. Photo uses of smartphones are expanded and enhanced by tripods and optical products.

IMAGE PROCESSING SOFTWARE

Given the large variety of functions, market surveys of good information value are difficult in the segment of image processing software. It is worth noting that most software packages which are supplied together with newly purchased PCs, tablets and notebooks, already include image processing programmes.

Moreover, numerous photo and imaging companies offer cameras with their own image processing software or they cooperate with software businesses. Possibilities for worldwide download make the collecting of sound market and value data even more challenging in this segment.
LENSES

The boom for digital SLR and compact system cameras ensures a persistently strong demand for lenses. Here, consumers favour high price products. Lenses rank among the most popular accessories, with sales of 1.635 million units in 2011. This means an increase by over 15 percent in terms of volume and nearly 20 percent to 485 million euros in terms of value. Somewhat over 90 percent of lenses sold (in units) are for SLR cameras.

Ten years ago, sales of lenses amounted to 381,000 units. This highlights the dimension of the present market. Volume and value are expected to increase also in 2012: sales are forecasted to total 1.72 million lenses, corresponding to an increase by 5.2 percent over 2011.

Today, many SLR and system cameras with interchangeable optics are sold in one kit with zoom lenses. In this case, consumers prefer standard zooms whilst telezooms come only second. By contrast, telezooms are the products of choice in individual purchases. There is a specific demand for extreme wide angle lenses, followed by macro lenses.

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**Accessories – Lenses Volume in ’000 units**

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<tr>
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**Accessories – Lenses Value in million euros**

<table>
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<th>Year</th>
<th>Value</th>
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<tr>
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<tr>
<td>2011</td>
<td>485</td>
</tr>
<tr>
<td>2012</td>
<td>500</td>
</tr>
</tbody>
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*forecast
FLASH EQUIPMENT

The growing interest in digital SLR and compact system cameras comes with a persistently strong demand for external, detachable flash devices with better performance, larger viewing angles and more flexible options for creative lighting – even though sales in Germany fell somewhat in 2011 (minus two percent to 200,000 units), at constant value.

The uptrend is attributed to the expanding range of lighting accessories, such as LED lamps which are needed for video recording. For 2012 a slightly declining market is forecasted, in terms of both volume and value.

PHOTO BAGS, BACKPACKS AND EQUIPMENT CASES

Photo bags, backpacks and equipment cases rank among the best-selling accessories in the photo market. In Germany alone, annual sales in the period from 2008 to 2011 incl. exceeded 5 million units. In 2011 sales fell by 1.9 percent to 5.2 million units, with a minor increase in value to 98 million euros. For 2012 a lower level is projected for volume and value.

TRIPods

Irrespective of more and more effective image stabilizers in cameras and lenses and sensors with higher sensitivity, tripods have not lost in importance.

In 2011 around 800,000 tripods (plus 12.5 percent against 2010) worth 34.4 million euros (plus 11 percent against 2010) were sold in Germany. For 2012 sales are anticipated to rise to 820,000 tripods.
The demand for memory capacity is growing continually because of the higher resolution of cameras and their manifold features, such as multi-shot, serial image or video functions. Furthermore, the intensive use of photo equipment requires enormous memory capacity: in Germany, cameras go click over 2,000 times every second.

After a drop by 14 percent to 20.6 million cards (memory capacity: 92.700 billion MB) back in 2010, the following year 2011 saw sales of 21.6 million cards with a further increased memory capacity of nearly 140 billion MB.

Since the entry in the digital world in 2001, the film market has been decreasing progressively. 14.2 million films were sold in 2011, reflecting a drop by somewhat over 22 percent as compared with 2010.

This development will continue in the years to come. But the business with film product remains lucrative for industry and trade. The price decline has slowed, development costs are predictable, and the margins are attractive. Instant film is experiencing a renaissance with a much stronger demand so that volume and value are expected to improve by more than 50 percent against 2011.
Photographers use projectors in lectures and for presenting their pictures and videos. Digital projection enables not only an easy control of presentations that can be enhanced with spoken texts and music – now transition effects can be created in numbers and varieties which would hardly be possible or require major efforts in the analog world.

After huge volume growth to 470,000 units in 2010, the market for projectors fell somewhat to 440,000 units in 2011. A rise in demand is anticipated for 2012, also because of sports events like the European football championship and the Olympic Games.
Sales of digital picture frames peaked in 2009 at 1.7 million units but – with the advance of tablets – the demand fell to 1.2 million units worth 80 million euros in 2011. A further decline in volume to below the one-million mark is expected for 2012. Tablet PCs are suitable not only for taking images and communicating with them; they are also used for picture processing and primarily for picture viewing.

In 2012 an estimated total of around 3 million tablet PCs is sold in Germany. This corresponds to an increase by 110 percent against 2011.
After years of decline due to the technology change from analog to digital, annual volumes of colour paper prints have been more or less constant at 4.7 billion prints over the past five years.

Even with the number of camera clicks having risen to over 2,000 per second in Germany, a major increase in colour paper prints is unlikely. This is due, inter alia, to the growing number of options in picture display – e.g. lamination on acrylic glass, hard foam boards, Alu-Dibond or canvas.

Giant glass prints on walls and ceilings, photographic motives on tiles in kitchens and bathrooms, photos on panels serving as table tops, sliding doors, partition walls or kitchen splashbacks, photos on wallpaper or parts of the furniture: consumers live with photos in their homes. This is a growth trend for spectacular and creative surroundings in ever more old and new rooms. Integrating photos in interior design worlds is made possible mainly by innovative processes which enable photo printing on a practically unlimited variety of materials.

According to a study by the market researchers IDC, the global market for these special photo products will increase on average by 23.5 percent per annum by the year 2014. In 2011 the market for wall decor with photographs was worth 50.8 million euros in Germany. In the Western European market, the market research firm Futuresource counted 17.6 million photo wall decorations with a sales volume of 172.9 million euros in 2011 for the product group of wall decor.

Product developers were confident right from their market introduction in 2005 that individual photo books would become top sellers. But they could not know that photo books would successfully defend their leading position in sales of the photo and imaging industry over such a long period of time. In the segment of individual photo books 6.4 million units were sold in 2011, reflecting an increase by 12.3 percent over the previous year and continuing a veritable boom. For Germany alone, further growth to 6.7 million photo books is projected for 2012. This would mean another improvement by 4.7 percent as compared with 2011. Studies show that mostly users of SLR and compact system cameras choose photo books for their very own way of picture presentation.
Consumers use the enormous amount of options provided by photo papers and the manifold possibilities and advantages of home printing mainly for the fast print of pictures, for experimenting with image effects, individually designed picture postcards and photo books and also for photo competitions and exhibitions.

Since 2006 the market for inkjet and thermal papers has been on the decrease; it is forecasted to be worth 31 million euros in 2012. There are no data for the FineArt, large format and foil markets in Germany. But with the expanding range of products, they are assumed to be growth markets in volume and value.

The market for photo fun products is growing for two reasons: the huge variety of products on sale, and the wish of consumers to give a personal note to products with the help of photography. Futuresource believes that values of over 310 million euros for Western Europe and ca. 90 million euros for Germany can be expected in 2011, with analysts predicting a value increase of around 10 percent for 2012. This positive trend will last in the years to come.
Like in 2009 and 2010, Prophoto GmbH conducted in 2011 an online consumer survey on photography, this time involving 1,277 respondents.

**THE STRONGEST MOTIVATION: ENJOYMENT OF PHOTOGRAPHY**

The consumer survey 2011 by Prophoto GmbH arrives at the conclusion that 97 percent of respondents take pictures because they enjoy it or to capture experiences/events. 93 percent of respondents preserve memories with photos, and 85 percent use photography for documentation purposes.

**POSTING PICTURES IN SOCIAL NETWORKS AND ONLINE GALLERIES**

According to various studies and recent press reports, image communication through social networks and online galleries is highly popular. However, in the Prophoto survey 2011, 55 percent of respondents state that they themselves do not use social networks for image communication.

The demographic analysis shows that mostly persons over 41 years of age do not consider posting pictures in social networks. Women of this age group are somewhat more open to social networks than men.

Going by the Prophoto survey, online galleries are better accepted than social networks: 55 percent of respondents use online galleries to publish their pictures. This preference over social networks comes from the good acceptance especially of online galleries among respondents in the age group of up to 55 years.
SENDING IMAGES BY EMAIL – A MUCH LOVED FORM OF COMMUNICATION

Consumers love sending images by email to their families and friends.

89 percent (2011), 77 percent (2010) and 78 percent (2009) of respondents stated to send their images by email. This is most likely for the protection of the persons photographed and because of the speed of emailing.

PRIVATE HOUSEHOLDS ARE WELL-EQUIPPED – SEVERAL IMAGE CAPTURING DEVICES

With the entry in the digital world, new dimensions have opened up for photography. Photo and imaging products are much sought-after. Back in analog times, usually 80% of households had only one camera for the entire family. This has changed in the age of digitalization.

Family members want their own photo equipment and bring it in a more and more professional form. Here the answers to the question which image capturing devices the respondents have in their households: 28 percent – camera mobile phone; 29 percent – smartphone; 67 percent – compact camera; 85 percent – SLR camera; 17 percent – compact system camera*; 13 percent – medium format camera; 13 percent – camcorder. These figures confirm that consumers have several image capturing devices at their disposal.

* Data for compact system cameras should be seen with some reservations, as it can be assumed that many respondents were not aware of the difference to SLR cameras at the time of surveying.
SINGLE LENS REFLEX (SLR) CAMERAS – INTENSIVE USE

With the digitalization of photography, the times when some 100 pictures a year were taken are definitely over. Now there are more than 2,000 camera clicks per second in Germany alone.

In particular, SLR cameras are used intensively – 70 percent of respondents state to take over 500 pictures a year with this type of camera, as compared with 24 percent of respondents who prefer compact cameras.

Camera mobile phones and smartphones are at hand for snapshots – 24 percent of respondents use camera mobile phones for up to 50 pictures a year whereas 15 percent of respondents resort to smartphones. Smartphones as cameras are used more intensively than camera mobile phones. 7 percent of respondents state to take between 50 and 100 pictures with smartphones.

WHAT INFLUENCES BUYING DECISIONS – TEST REPORTS, PRICES, BRANDS

Test reports have a good standing among consumers, as it emerges from the Prophoto consumer survey 2011: test reports are decisive in the buying decisions of 92 percent of respondents.

Other major factors of influence in buying decisions are the price (84 percent of respondents), the brand (78 percent), features (72 percent), and recommendations by friends (64 percent).
Irrespective of manifold options of image viewing by means of television, tablets, digital picture frames, PC screens or projectors, photo paper prints remain highly valued by consumers. 10 percent of respondents state to have printed over 500 photos on paper during the 12 months before the survey. Only 3 percent of respondents do not print their pictures on paper. In the last 12 months, 29 percent of respondents obtained between 1 and 50 paper prints whilst 22 percent obtained between 51 and 100 paper prints.

Photo books are much sought-after: 59 percent of respondents in the online survey state to have purchased at least one individual photo book in the last 12 months. This corresponds to the result of the Prophoto consumer analysis 2010. According to the most recent Prophoto survey, consumers also appreciate photo posters (46 percent) and photo calendars (36 percent).

The survey shows that 18 percent of respondents bought extra value products connected with photography – e.g. cups, deco articles, T-shirts – during the last 12-month period.

Furthermore, the Prophoto survey finds that the interest in photo books and photo posters is equally strong among women and men. The results are quite different for photo greeting cards (29 percent women, 16 percent men), photo calendars (45 percent women, 32 percent men) and individualized photo gifts (31 percent women, 12 percent men).
Prophoto GmbH is a wholly owned subsidiary of Photoindustrie-Verband.

With its comprehensive service portfolio – consumer surveys, data collecting for the photo and imaging market, newsletter, up-to-date reporting from the industry, product information, basics of photo and video, practice tips etc – Prophoto GmbH is a competent contact and partner for the media, companies, trade and consumers.

The photo and imaging portal www.prophoto-online.de and the extensive communication and marketing activities of Prophoto GmbH in the fields of printed press, radio, television and internet and in wide-reaching social media channels lastingly contribute to promoting photography and videography, image communication and photokina – the world’s leading imaging fair. Since 2012 Prophoto GmbH conducts online consumer surveys also for companies. With this new service, businesses can benefit from Prophoto’s know-how.

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