PRODUCER OF

Digital Camera Market

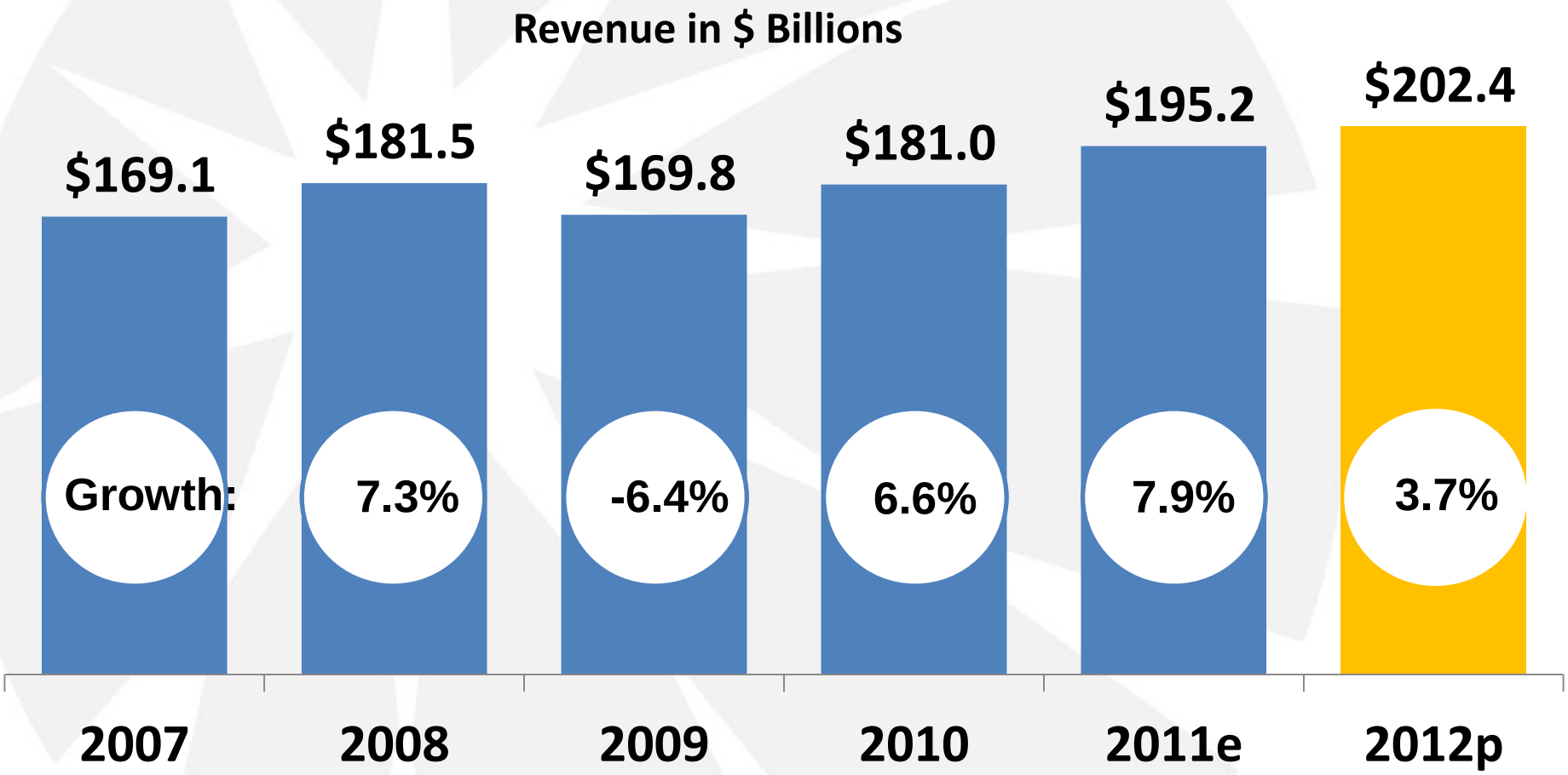
Overview

Kevin Tillmann
Senior Research Analyst

Chris Ely
Manager, Industry Analysis

www.CE.org

Total U.S. CE Shipments



Source: CEA, U.S. CE Sales and Forecasts, January 2012

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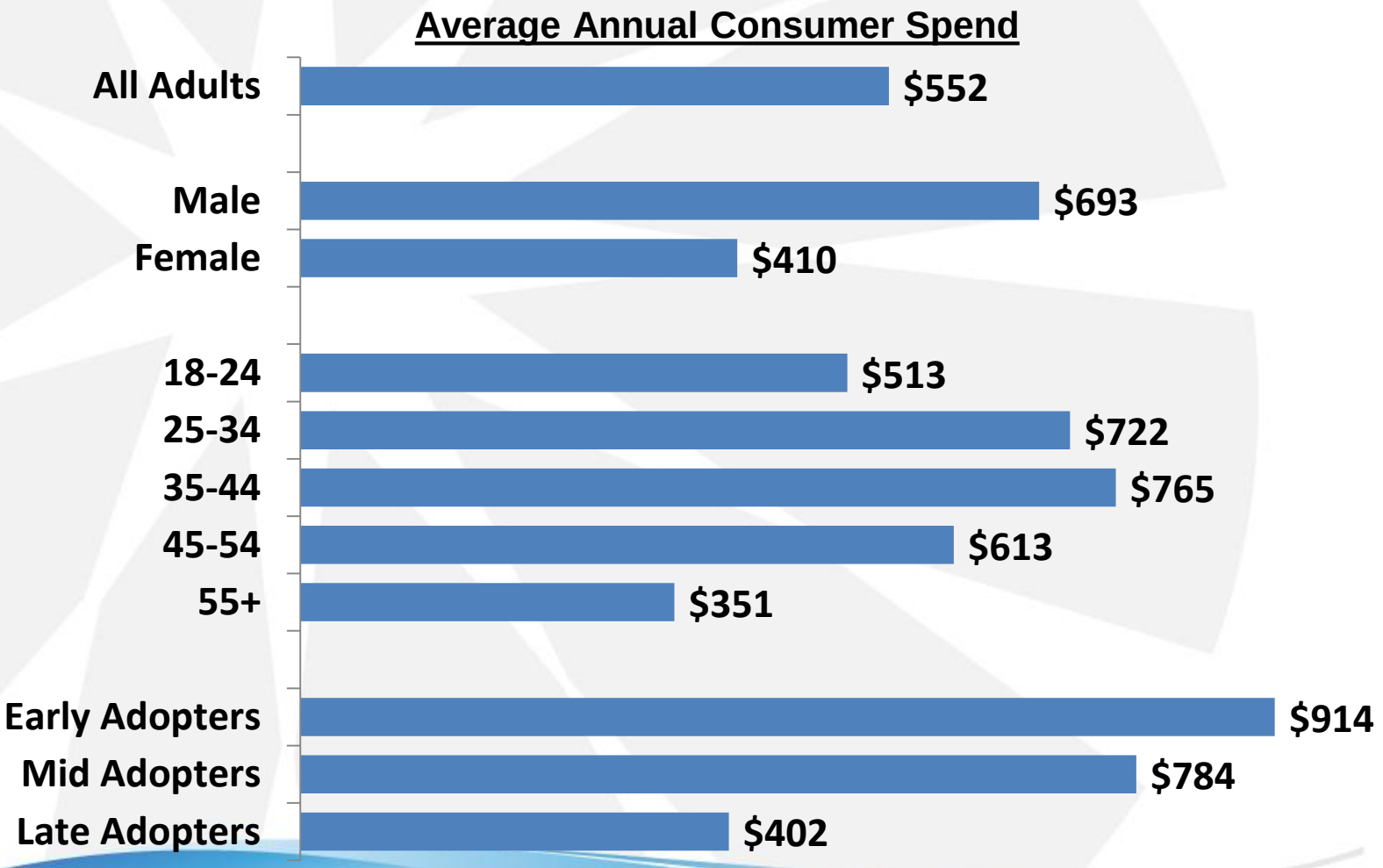
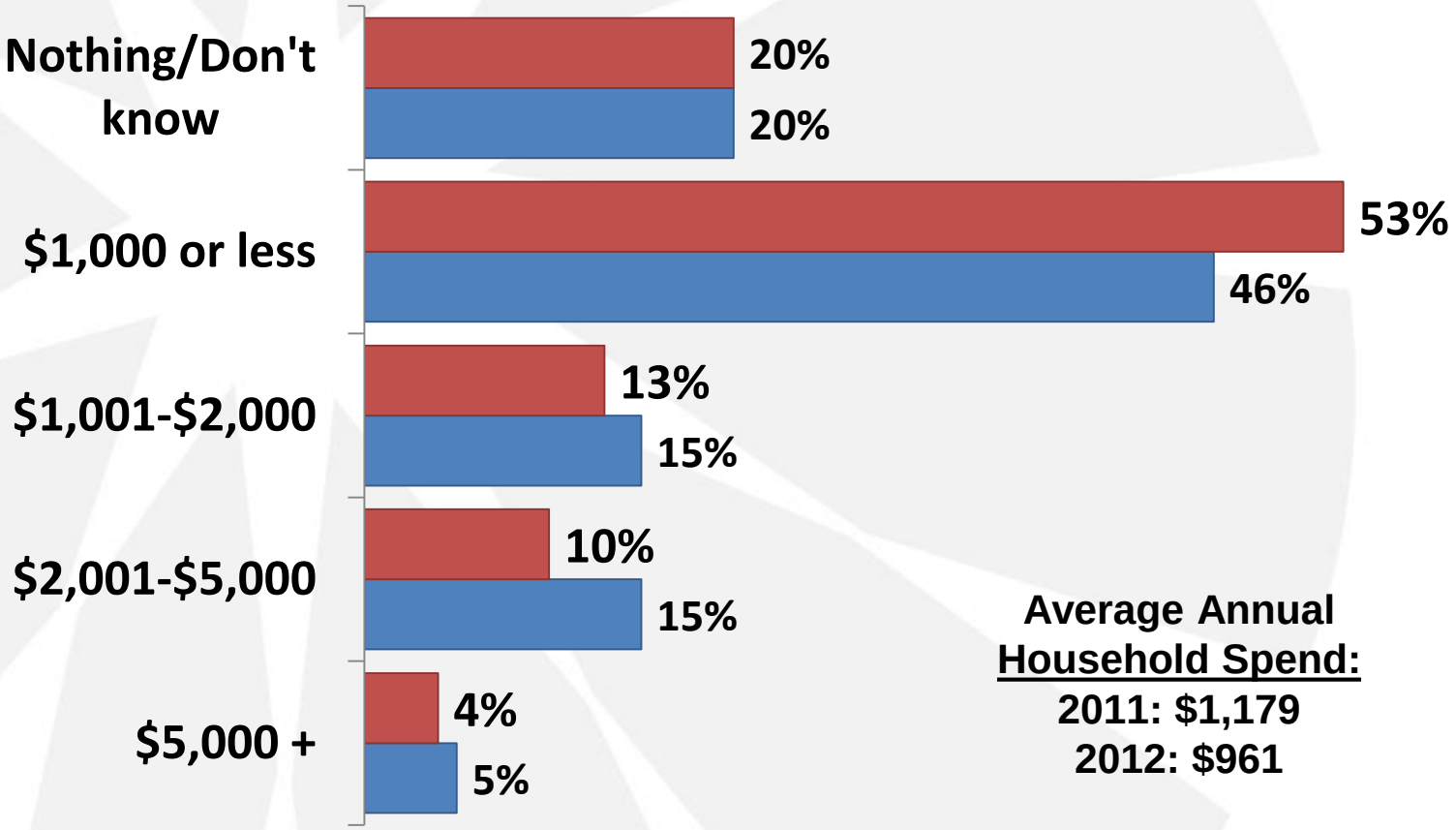
Personal Spending on Consumer Electronics



Source: CEA, *CE Ownership and Market Potential* study (2012)
Base: U.S. adults

Annual Household Spending on CE



Average Annual Household Spend:
2011: $1,179
2012: $961

Source: CEA, *CE Ownership and Market Potential* study (2012)
Base: U.S. adults

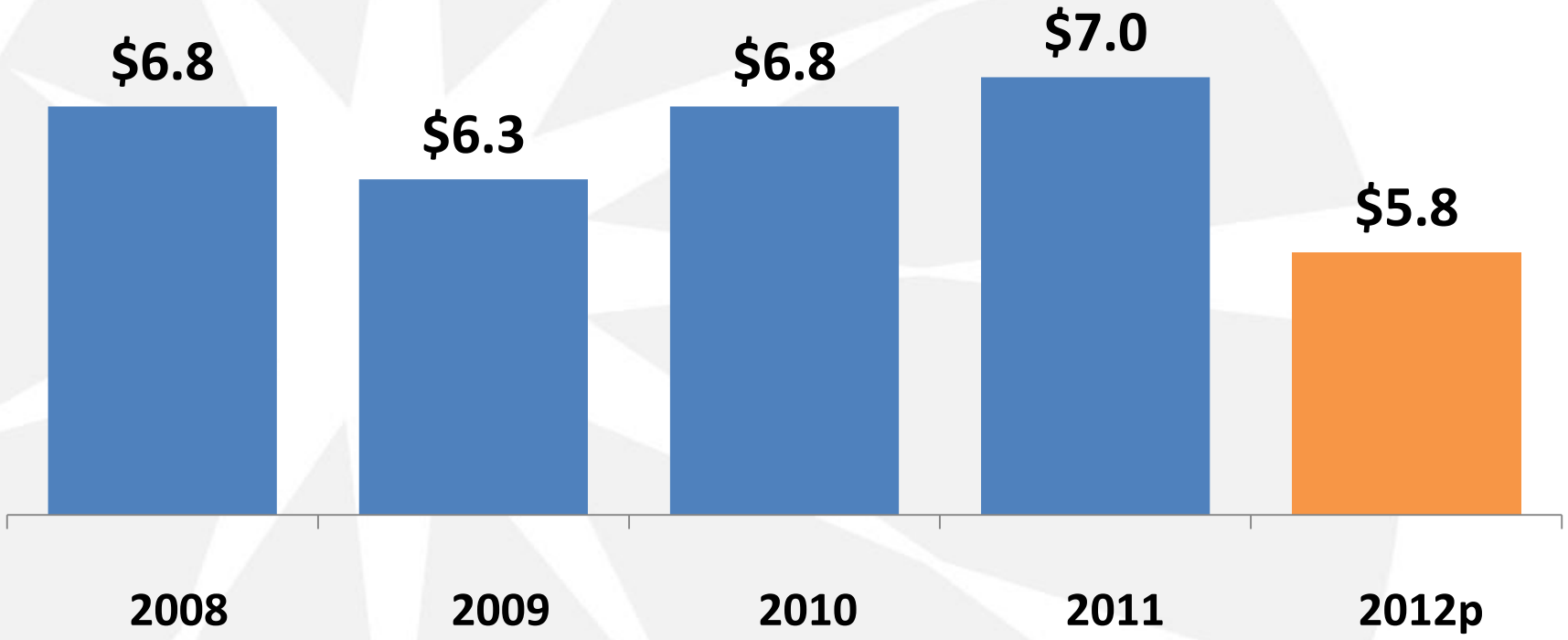
Top CE Purchases Planned for 2012

Rank	Overall Households		Small Spenders (<$1,000/yr)		Medium Spenders ($1,000-$2,000/yr)		Large Spenders (>$2,000/year)	
1	Smartphone	22%	Smartphone	16%	Smartphone	35%	Smartphone	38%
2	HDTV	17%	HDTV	14%	HDTV	26%	Tablet computer	34%
3	**Digital camera**	**15%**	**Digital camera**	**13%**	iPod© car connect kit	24%	Notebook or laptop computer	26%
4	Notebook or laptop computer	14%	Basic cell phone	13%	Network router or hub	24%	Speakers for MP3 player or iPod©	26%
5	Tablet computer	14%	Bluetooth headset	12%	Notebook or laptop computer	21%	Hands free car kit	26%
6	Basic cell phone	14%	Notebook or laptop computer	11%	Bluetooth headset	20%	HDTV	25%
7	Bluetooth headset	14%	TV with a screen 40+ in	11%	TV with a screen 40+ in	20%	**Digital camera**	**25%**
8	TV with a screen 40+ in	14%	TV with a screen < 40 in	11%	Multi-function printer	20%	iPod© car connect kit	25%
9	iPod© car connect kit	14%	Network router or hub	10%	Blu-ray Disc player	20%	TV with a screen 40+ in	23%
10	Network router or hub	13%	Flat panel LCD TV	10%	Portable MP3/digital media player	19%	External hard drive	20%

Source: CEA, *CE Ownership and Market Potential* study (2012)
Base: U.S. adults

U.S. Digital Camera Revenue

(Wholesale revenues in billions)



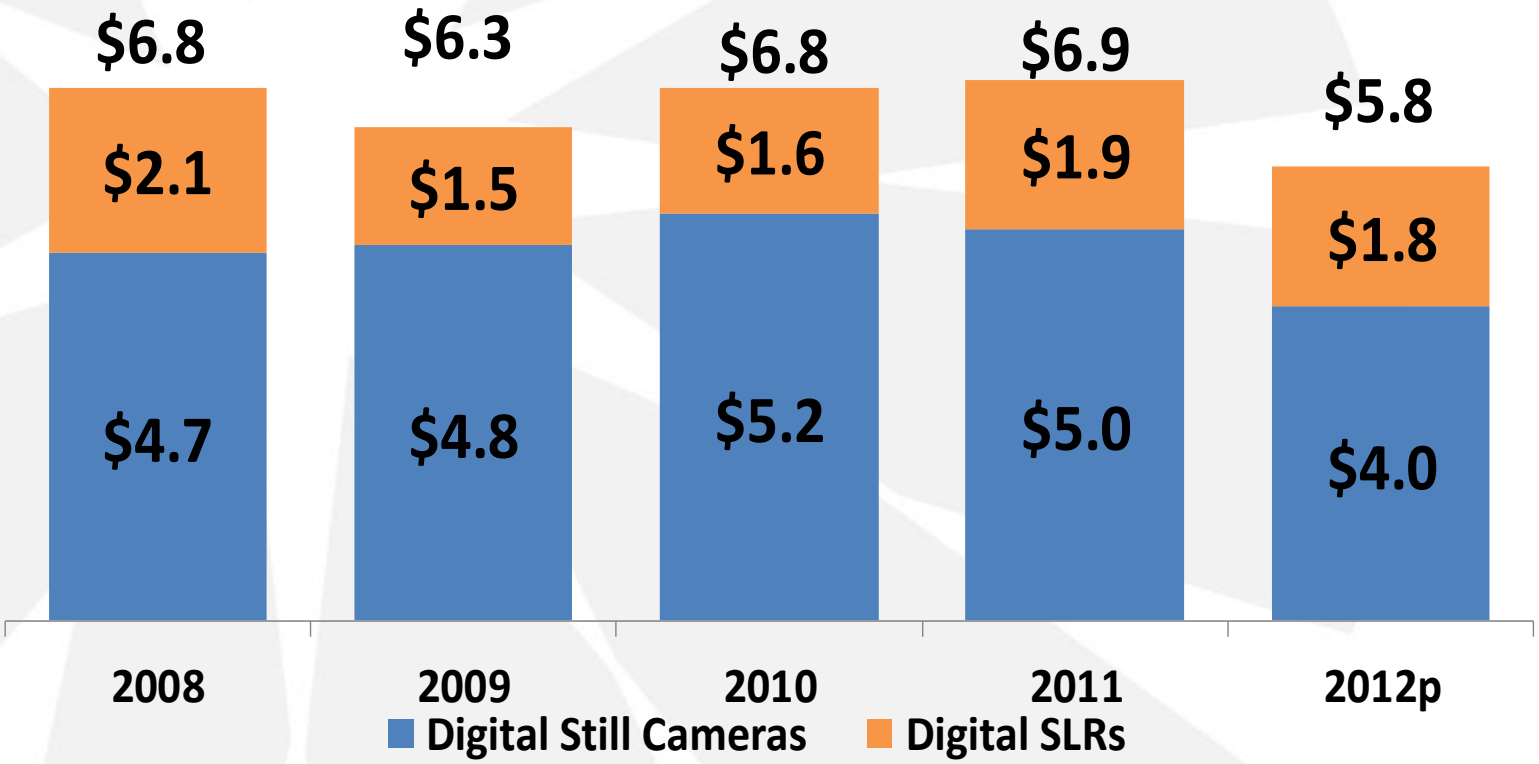
84% of U.S. Households Own a Digital Camera Today

p=projection

Source: CEA Sales and Forecasts, January 2012

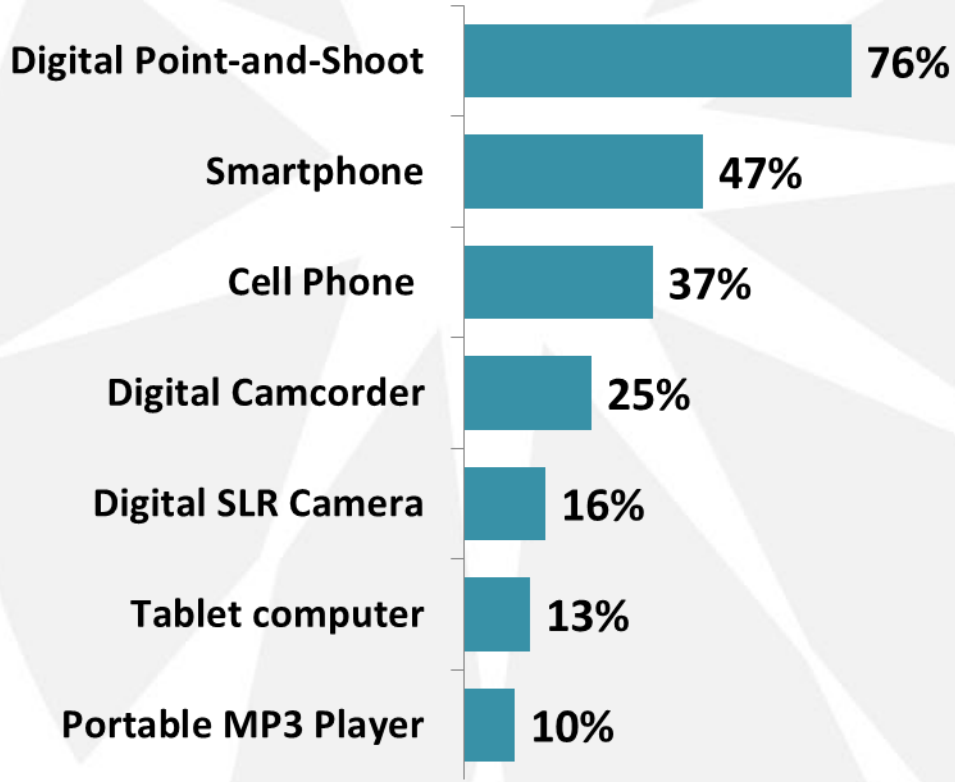
Digital Imaging Market Revenue Trend

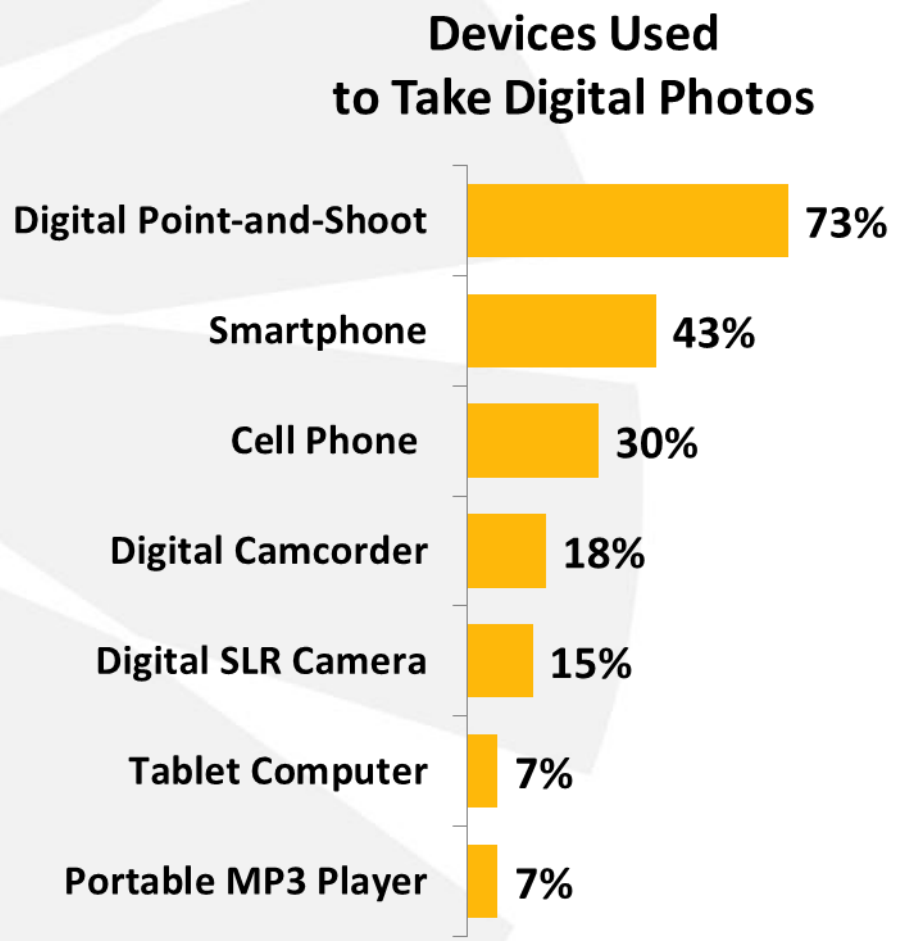
Wholesale Revenues in Billions



Source: CEA Sales and Forecasts, January 2012

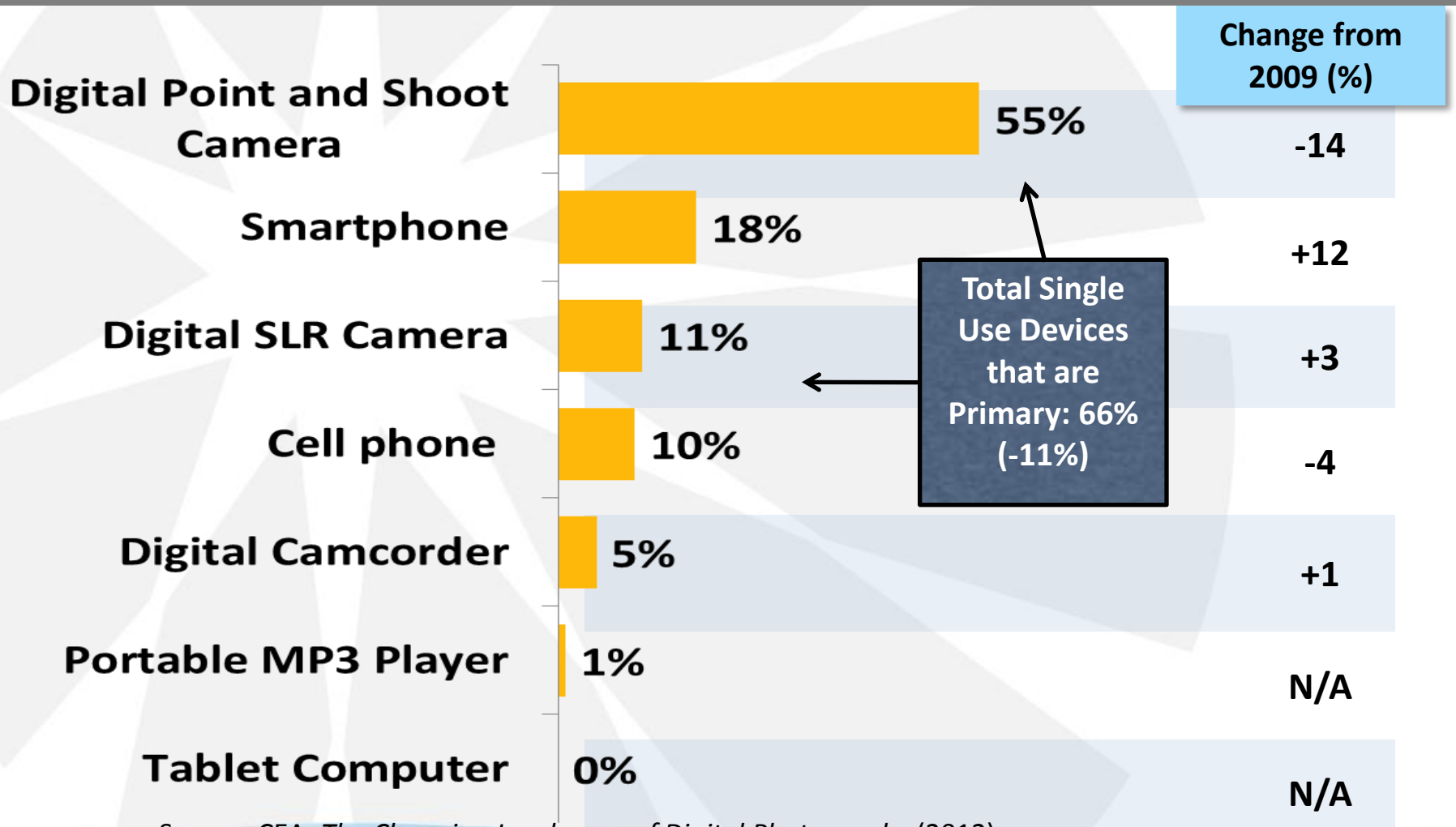
Digital Point-and-Shoot Most Popular For Photos, Followed by Smartphones





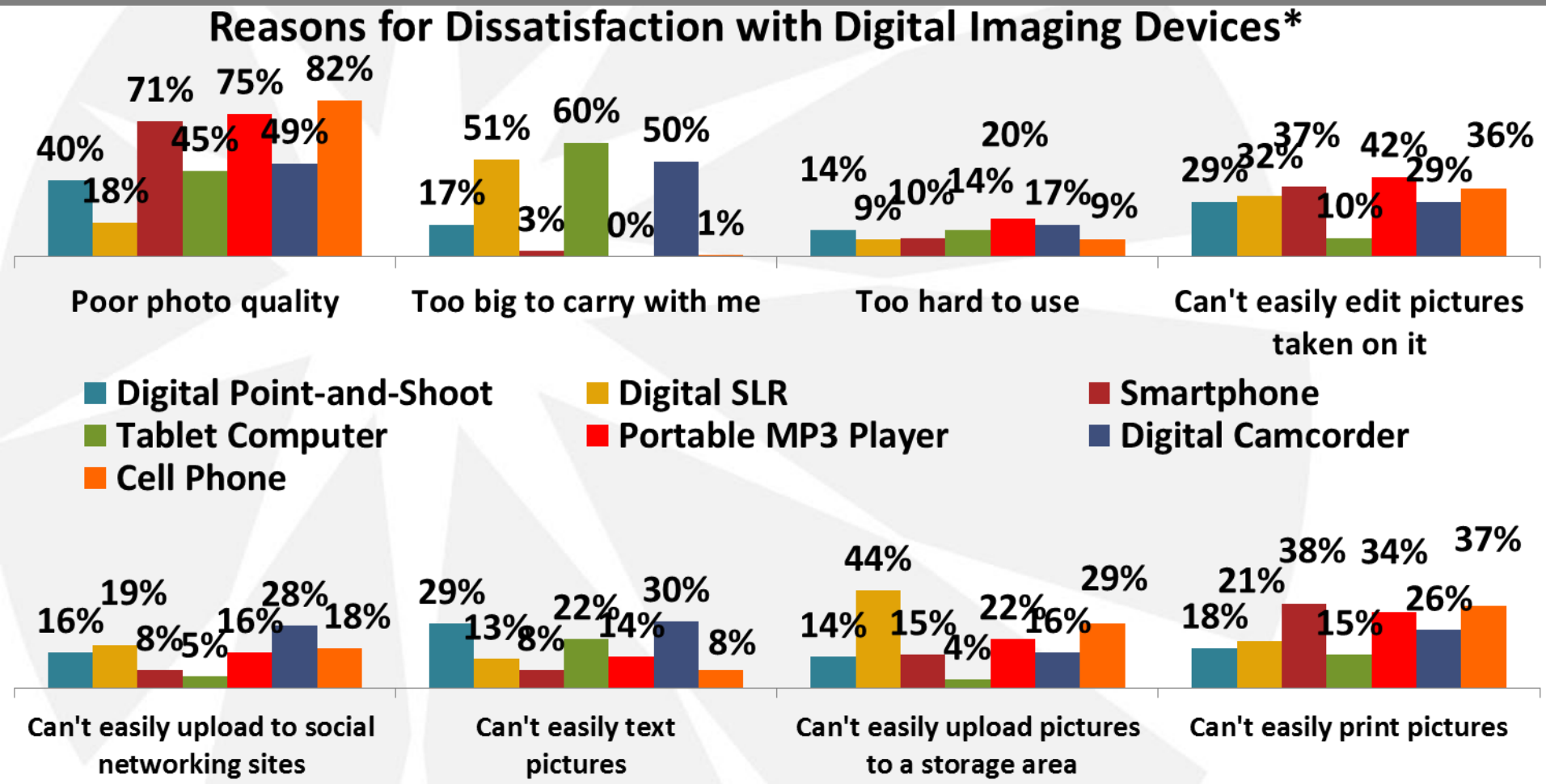
Source: CEA, *The Changing Landscape of Digital Photography* (2012)
Base: Online adults us use said device
S7. Of the devices you said you use, which are capable of capturing digital photographs?
S7A. Of the devices that are capable of capturing digital photos, which have you used to take a digital photo?

Digital Point-and-Shoot Cameras Used Most Frequently As Primary Photo Device



Source: CEA, *The Changing Landscape of Digital Photography* (2012)
Base: Digital photographers, n=1,001
S8. Of the following devices you have used to take digital photos, which ONE do you consider to be your primary device for taking digital photos?

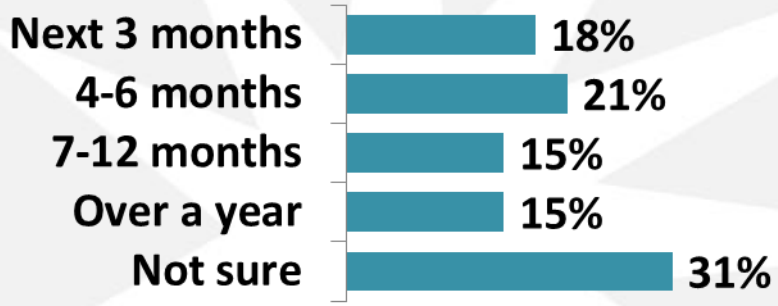
Reasons for Dissatisfaction Vary, Although Poor Photo Quality Cited Most Frequently for Majority of Devices



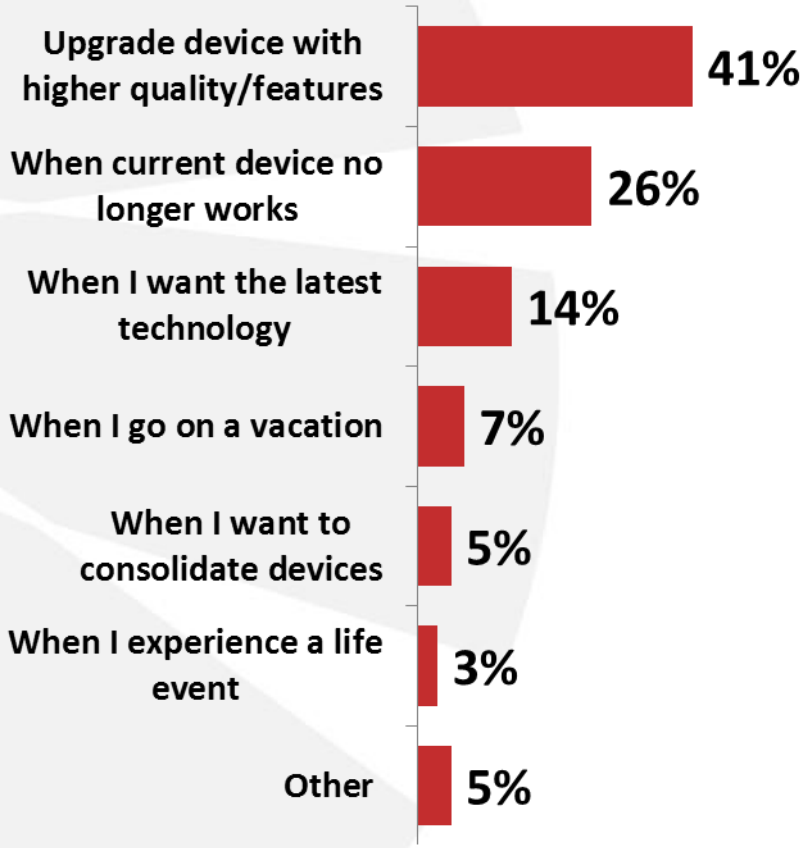
Source: CEA, *The Changing Landscape of Digital Photography* (2012)
Q9. Why are you not more satisfied with your [insert device name] for taking digital photos?
* Asked only of those who rated said digital imaging device between 1-3 on a 5-point scale, where 1 represents "very dissatisfied" and 5 represents "very satisfied".

Four in Ten Photographers Plan to Purchase Next Device in 6 months

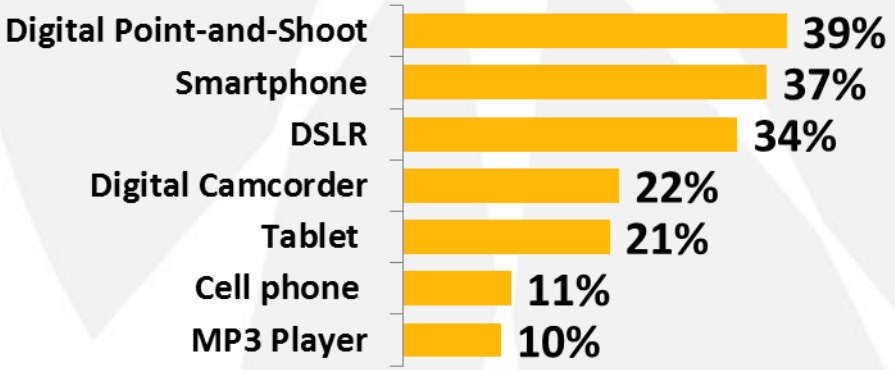
When Next Device Will Be Purchased



Most Likely Trigger for Purchase of Next Digital Imaging Device



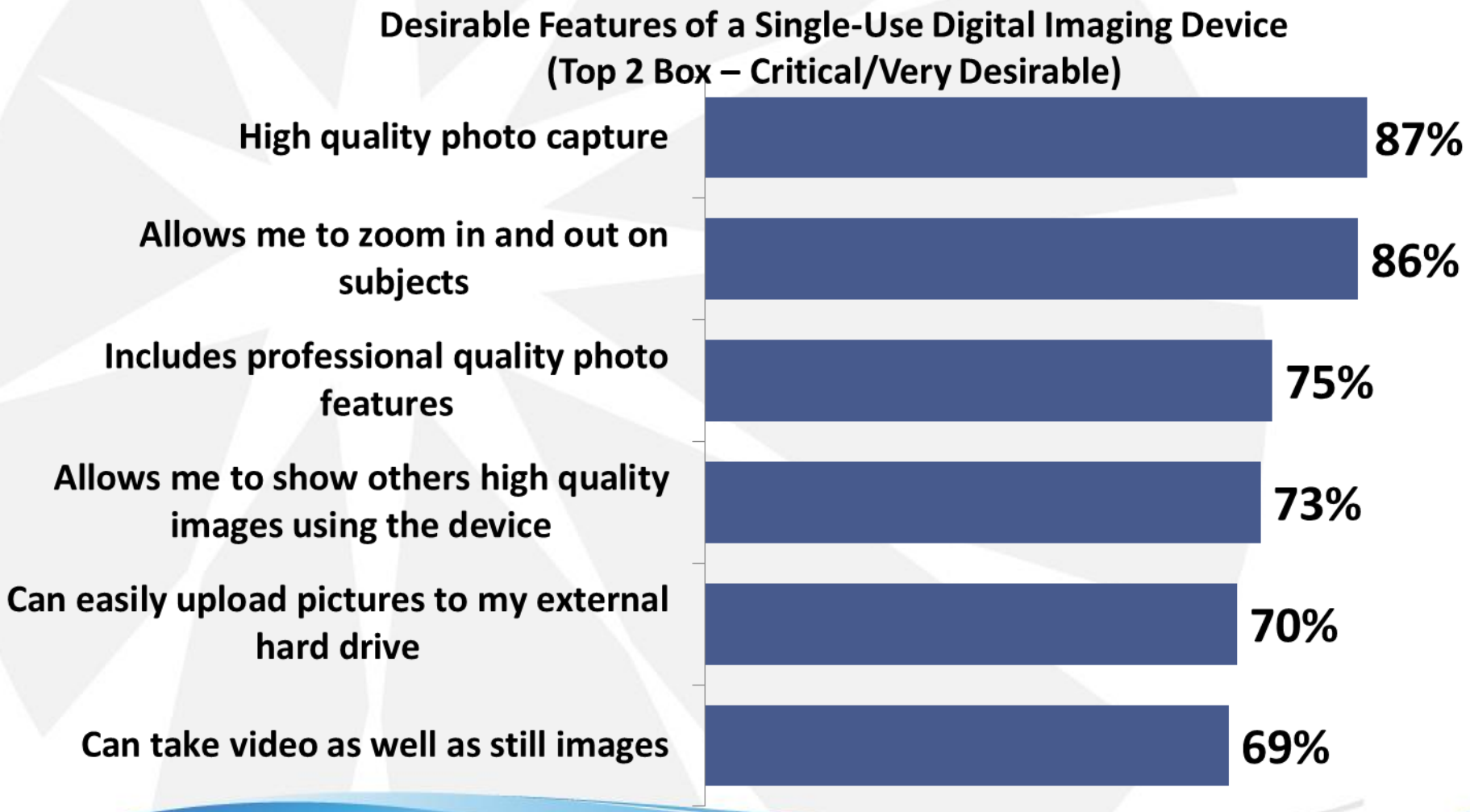
Expected Next Purchased Device



Source: CEA, *The Changing Landscape of Digital Photography* (2012)
Q10. Approximately when do you plan to buy your next device to take digital photos? This includes any device with which you intend to take pictures, even if it can be used for other purposes, n=1,001
Q11. In the next 12 months, which device(s) do you plan to buy to take digital photos? Select all that apply, n=531
Q12. What will most likely prompt you to buy your next device to take digital photos?, n=1,001

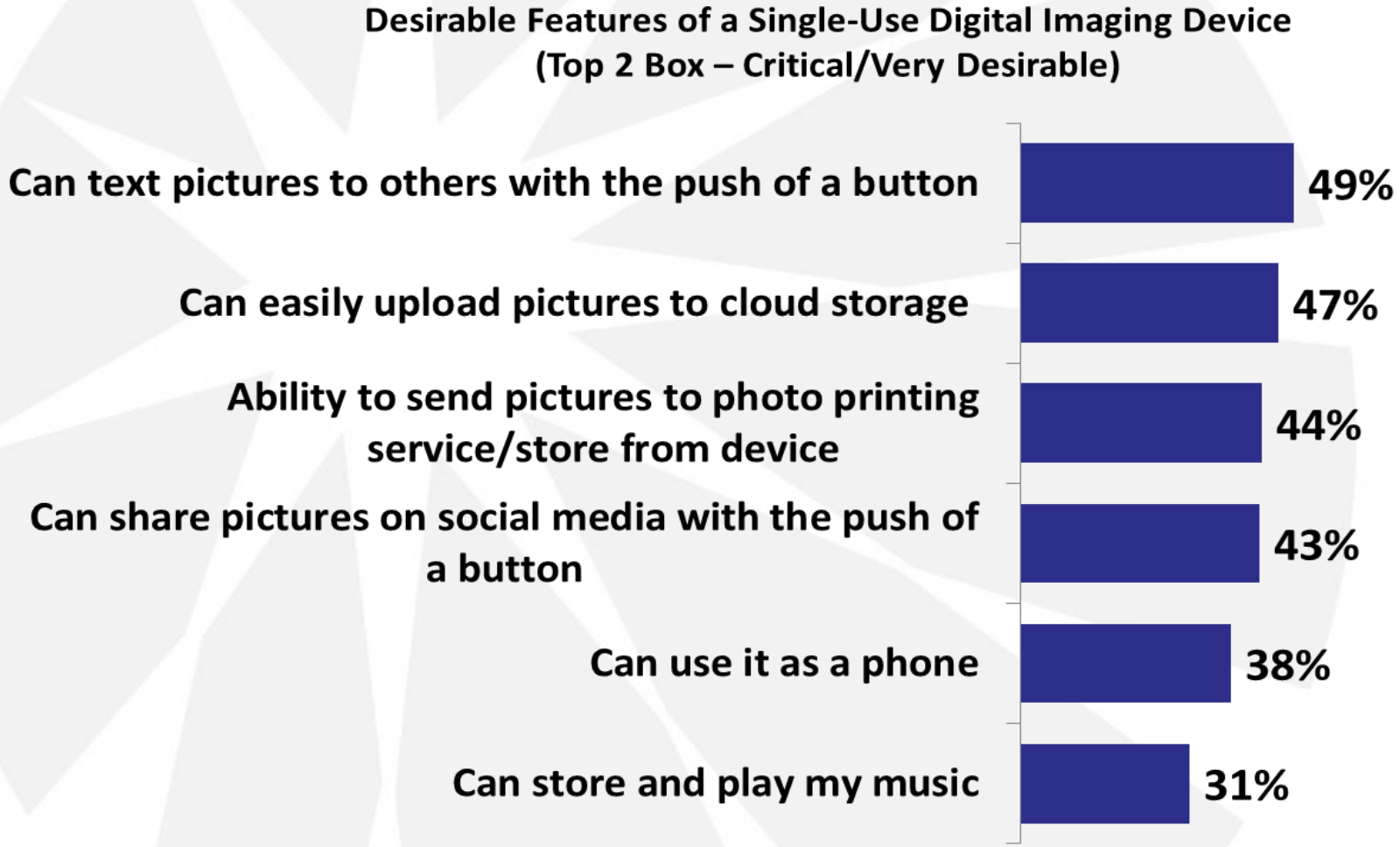
Designing the Ideal Single Use Digital Imaging Device

New Devices Should Offer High Quality Images, Zoom Features and Be Easy to Control



Source: CEA, *The Changing Landscape of Digital Photography* (2012)
Base: Digital Photographers, n=1,001
Q14. Suppose you wanted to build a single device primarily to take digital photos. Please indicate how much you would like each of the features listed below to be included on this single device.

Other Features Perceived As Being Less Important

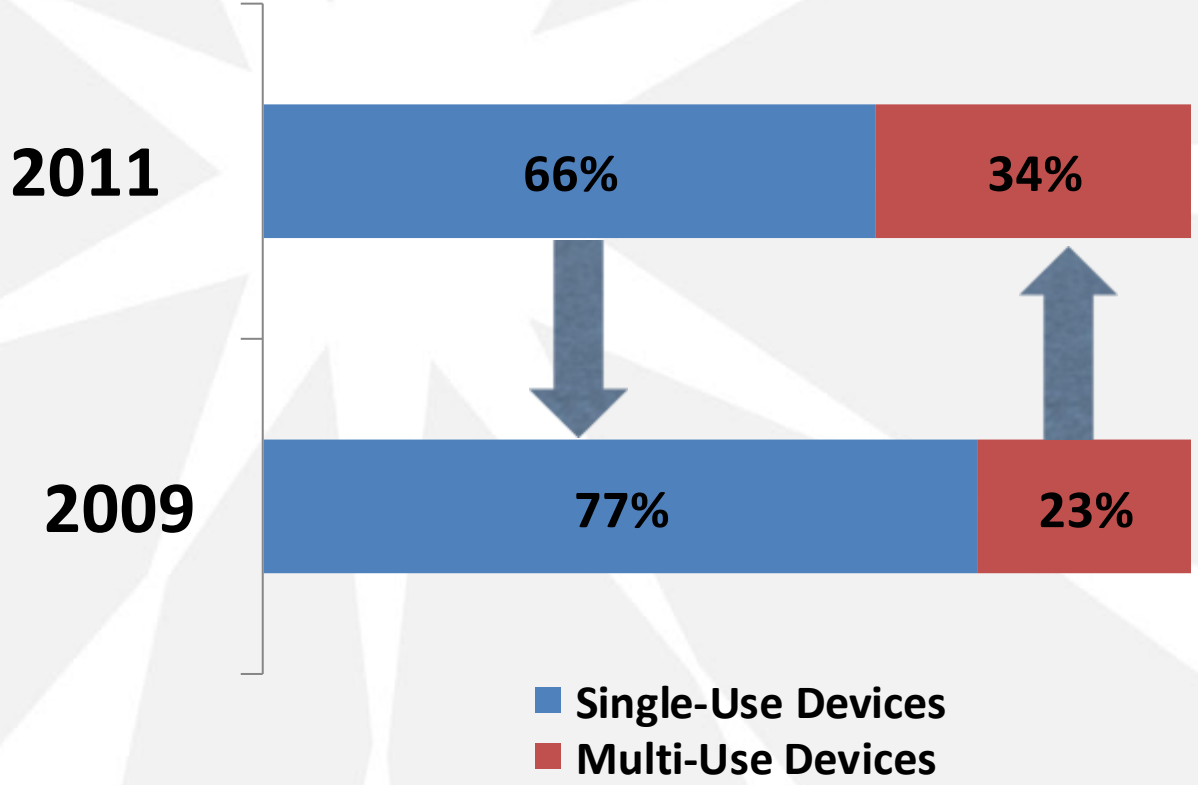


Source: CEA, *The Changing Landscape of Digital Photography* (2012)
Base: Digital Photographers, n=1,001
Q14. Suppose you wanted to build a single device primarily to take digital photos. Please indicate how much you would like each of the features listed below to be included on this single device.

Digital Photography Behaviors

Significant Movement Towards Multi-Use Devices

Primary Digital Imaging Device Type: 2011 vs. 2009



Source: CEA, *The Changing Landscape of Digital Photography* (2012)
S8. Of the following devices you have used to take digital photos, which ONE do you consider to be your primary device for taking digital photos?

Regardless Device, Photographers Plan to Take More Pictures

Digital Photographers' Plans for Picture Taking with Each Device in the Next two Years			
	Take More Pictures	Take Less Pictures	Momentum (More - Less)
Multi-Use Devices			
Smartphone	50%	9%	+41%
Tablet	39%	19%	+20%
Digital Camcorder	33%	17%	+16%
Cell Phone	27%	20%	+7%
Portable MP3 Player	31%	29%	+2%
Single-Use Devices			
Digital SLR	53%	10%	+43%
Point & Shoot Digital Camera	38%	10%	+28%

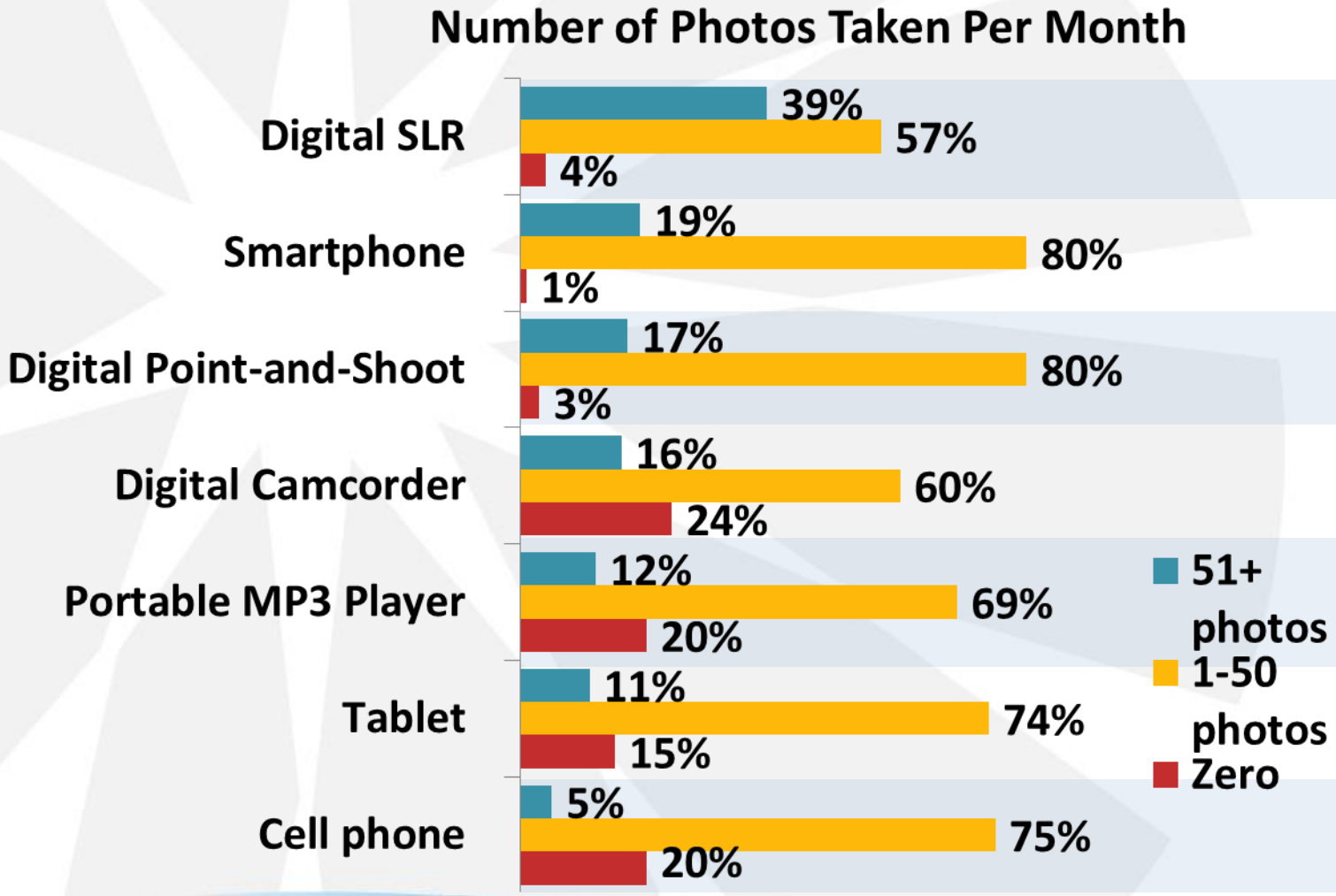
Source: CEA, *The Changing Landscape of Digital Photography* (2012)
Q16. In the next two years, how will the number of pictures you take with each device change?

Dedicated and Multi-Use Devices appeal to Different Users and Meet Different Needs

	Single Use Device is Primary	Multi-Use Device is Primary
Demographics	Older More Affluent Married More Educated More White	Younger Less Affluent Single More Children in HH More Students More Diverse
Behaviors	More Planned	Spur of the Moment More Early Adopters

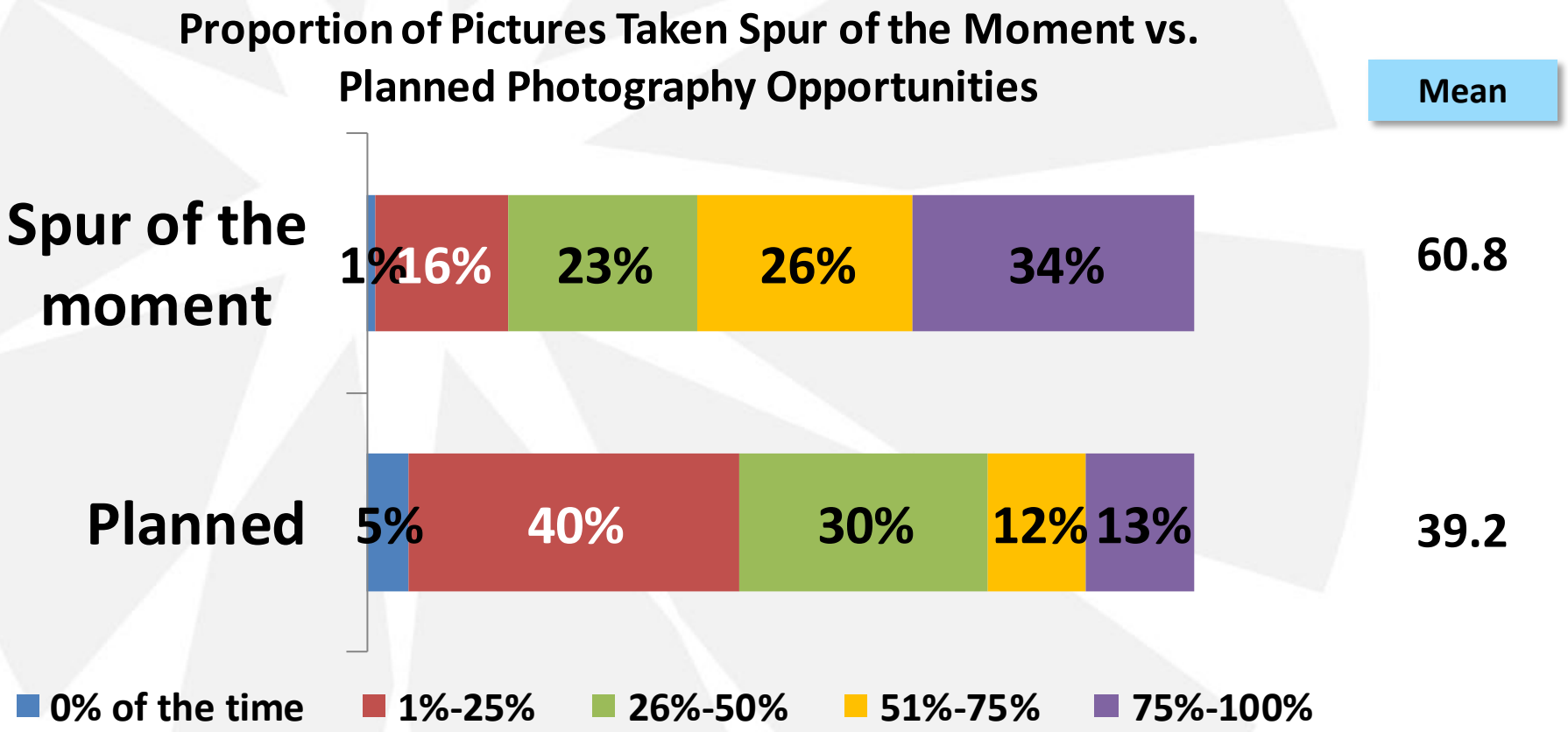
Source: CEA, *The Changing Landscape of Digital Photography* (2012)

Wide Range in Number of Photographs Taken by Device



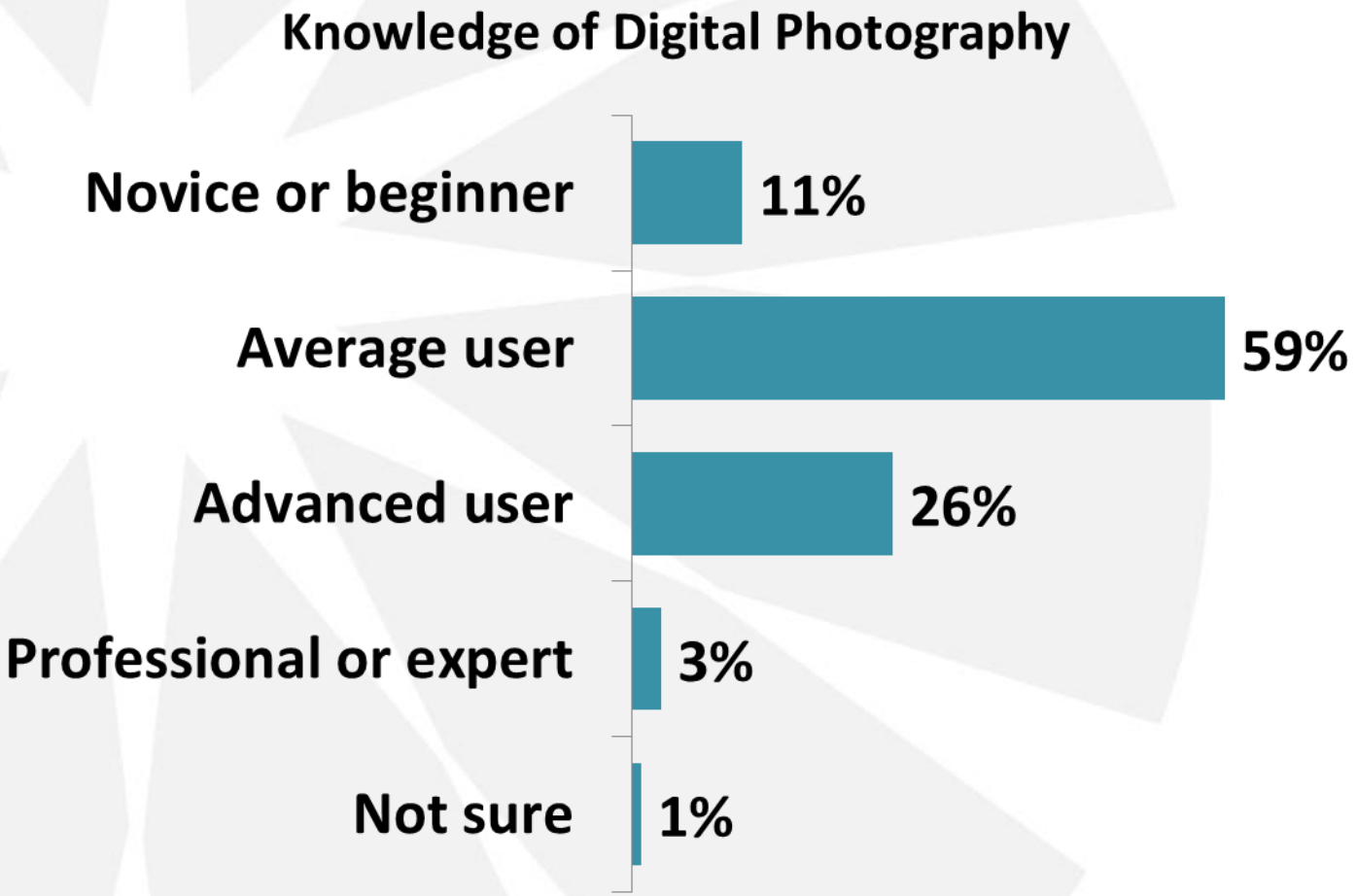
Source: CEA, *The Changing Landscape of Digital Photography* (2012
Q15. How many pictures do you take in a typical month with each of the following devices?

Most Photos Taken Are Spur of the Moment



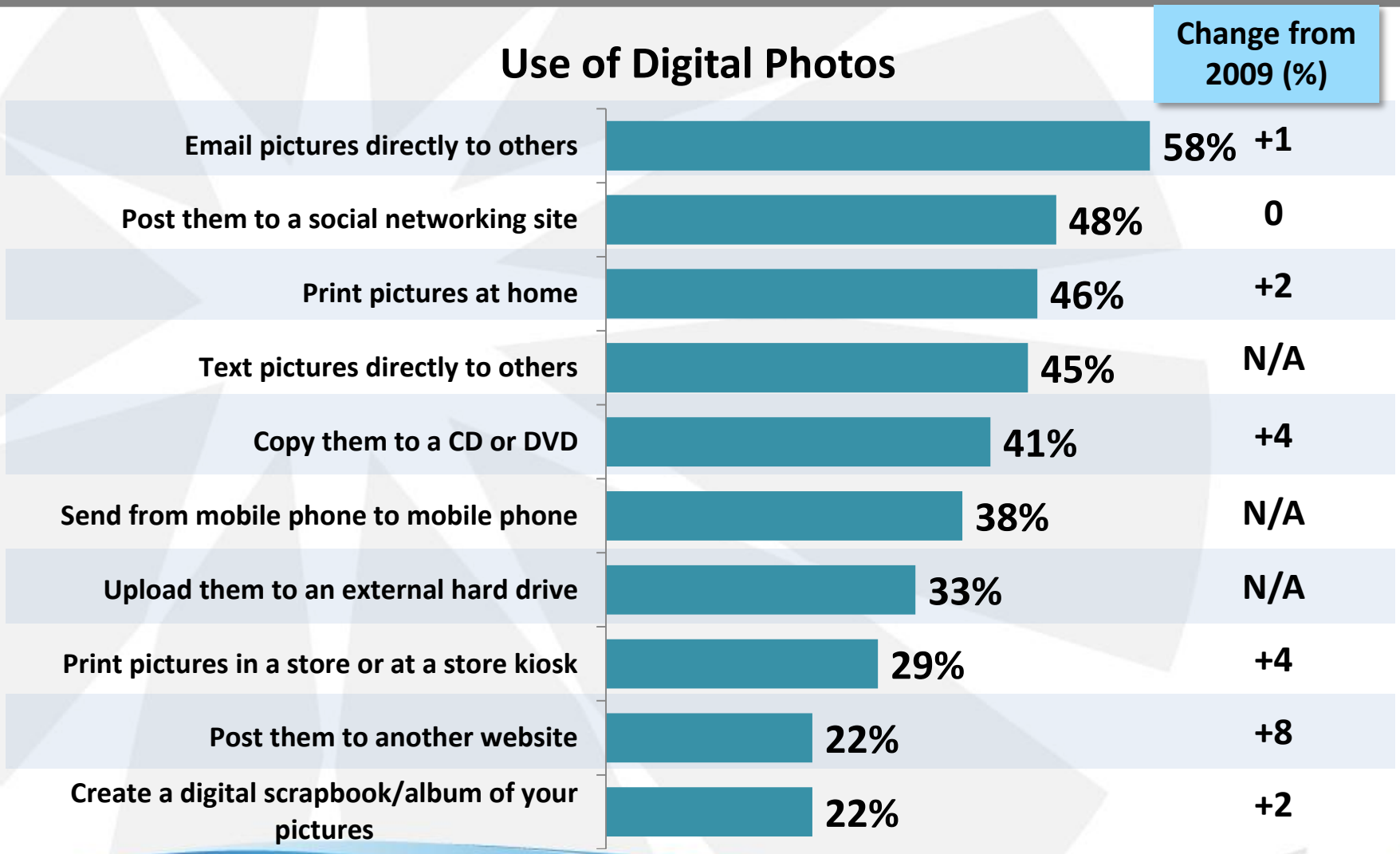
Source: CEA, *The Changing Landscape of Digital Photography* (2012)
Base: Digital Photographers, n=1,001
Q2. Some pictures are taken on the spur of the moment, while others are planned photo opportunities, such as on a vacation or at a birthday party. Approximately, what percentage of your photos are [taken SPUR OF THE MOMENT/PLANNED]?

Six in Ten Photographers Have an Average Knowledge Level



Source: CEA, *The Changing Landscape of Digital Photography* (2012)
Base: Digital Photographers, n=1,001
Q17. When it comes to digital photos, do you consider yourself to be a...?

Extensive Sharing of Photos, but Consumers Are Replacing Paper Images with Digital Alternatives



Source: CEA, *The Changing Landscape of Digital Photography* (2012)
Base: Digital photographers, n=1,001
Q5. Which of the following, if any, do you typically do with your photos?

Thank You and Enjoy the Reception!

We Look Forward to Serving You as a CEA Member!

Kevin Tillmann
Senior Research Analyst
ktillmann@ce.org
703-907-7451

Chris Ely
Manager, Industry Analysis
cely@ce.org
703-907-5241