



Introduction

The U.S. digital imaging landscape has undergone a great deal of change in recent years. With the widespread adoption of the smartphone, the market for digital imaging has become increasingly fragmented. While younger consumers are more likely to use smartphones for their digital imaging activities, those 50 and above remain loyal to digital point and shoot cameras. This report will provide a profile of the digital imaging behaviors and attitudes of online U.S. photographers 50 and above.

Furthermore, this AARP sponsored analysis brief examines the results from CEA's *Digital Imaging – Photo Sharing and Printing* study to provide insight into how the 50+ segment of U.S. digital photographers differs from their younger counterparts.

Note: In this report, those referred to as “digital photographers” or “photographers” are U.S. adults, ages 18 and over, who own and use one or more digital still photography devices and have taken a digital photograph in the past 12 months.

Imaging Device Ownership and Behavior

About two in three (64%) U.S. digital photographers ages 50 and over own a digital point and shoot camera, while two in five (36%) own a smartphone. On the other hand, while a similar percentage of online U.S. digital photographers under the age of 50 (64%) own a digital point and shoot camera, the younger segment of the population is much more likely to own a smartphone (72%).

- The distinction between the two age segments of photographers remains pronounced when looking at device use. For those 50 and above, over half use a point and shoot camera (52%) while only one in four (26%) use a smartphone for digital imaging. As with ownership, a similar percentage of those under 50 use a point and shoot camera (52%), but about two in three (63%) use a smartphone for digital imaging.
- Further still, half of photographers 50 and above (50%) use point and shoot cameras as their primary imaging device, while only a small percentage (15%) consider smartphones to be their primary device. Instead, photographers under 50 are more likely to use smartphones as their primary imaging device (40%), rather than point and shoot cameras (29%).
- The discrepancies between the age groups extend to the number of photos taken each month. U.S. photographers 50 and above take an average of 23 photos each month, while those under 50 average 54 photos taken each month. Furthermore, over half (58%) of those 50 and above take 10 or fewer pictures in a month compared to only 35% of photographers under 50.

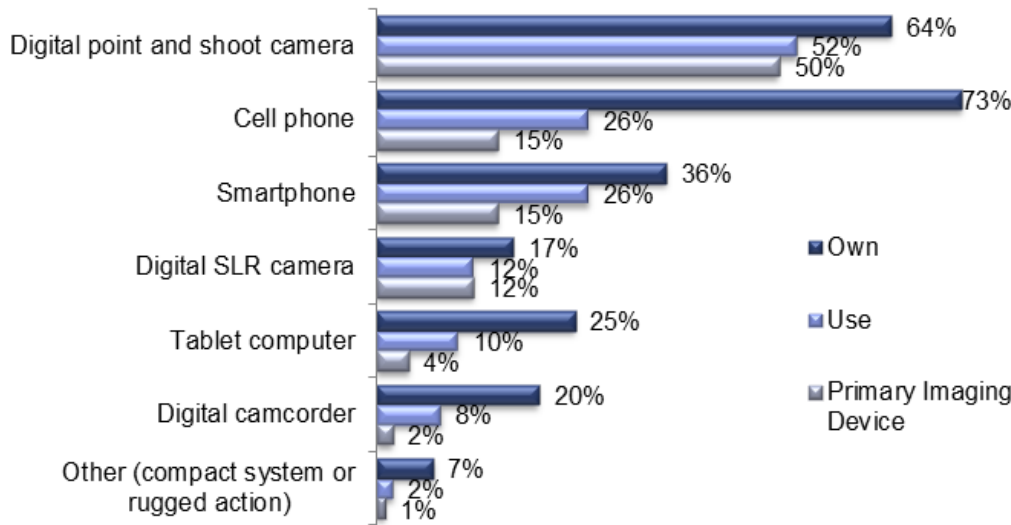
Market Size

- Over 100 million people ages 50 and over currently reside in the United States. This segment represents nearly one third of the overall U.S. population.
- This age segment is projected to increase to about 135 million people by 2030 and constitute approximately 37% of the overall U.S. population (a 5% increase).
- The highest expenditures for this age segment compared to younger age groups include healthcare, personal care, and entertainment.

Source: US Census Bureau / AARP / CEA



Figure 1: Imaging Device Ownership and Use



Base: Online U.S. adult photographers age 50 and above (n=320)

S1: Which of the following electronics products, if any, do you or someone living in your household currently own?

Q2: Which of the following, if any, have you personally used to take a digital photo in the past 12 months? Click all that apply.

Q3: Which ONE do you consider to be your primary device for taking digital photos?

Imaging Device Sharing and Printing

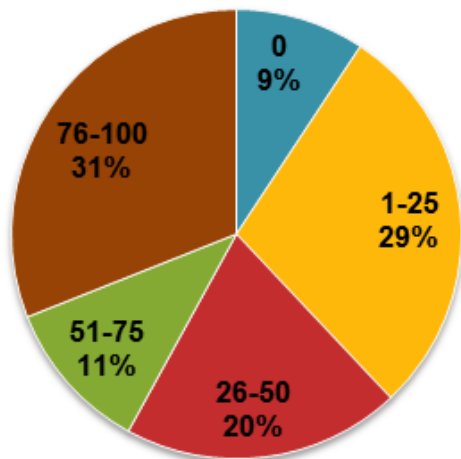
Overall, sharing photos is equally prevalent among older and younger photographers. However, U.S. photographers 50 and above are less likely to share their photos electronically. When it comes to printing, U.S. photographers under 50 are also somewhat more likely to print their digital images.

- On average, both age groups of U.S. photographers share roughly 50% of their digital photos. But when it comes to sharing images electronically, U.S. photographers 50 and above are much less likely to

post their images to a social network (40% to 68%), post them to a photo sharing site (11% to 22%), or post them to another website, such as a blog (13% to 22%).

- Older U.S. photographers also spend slightly less on their digital images than their younger counterparts. On average, U.S. photographers 50 and above print 8 photos per month compared to 13 per month for those under 50. Additionally, older photographers spend \$51 per year to print photos compared to \$68 per year for those under 50.

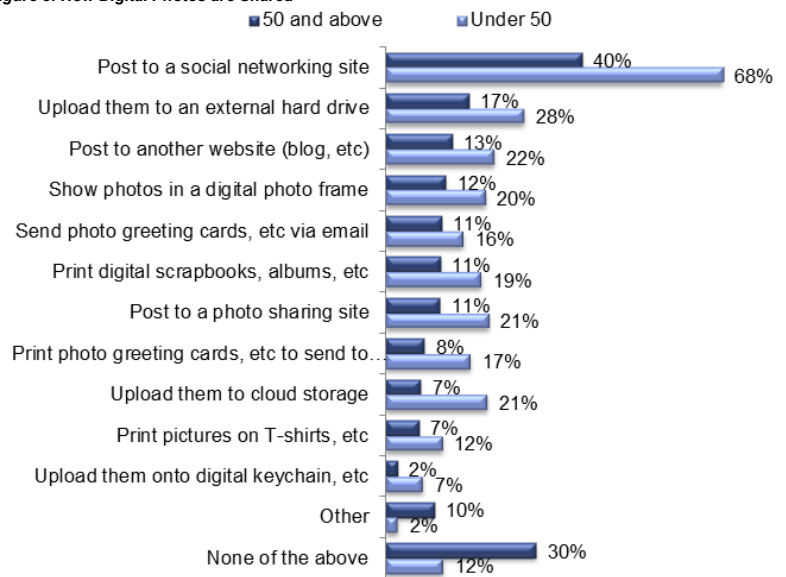
Figure 2: Percentage of Digital Photos Shared



Base: Online U.S. adult photographers age 50 and above (n=320)

Q5: Approximately what percent of the digital photos you take do you share with other people?

Figure 3: How Digital Photos are Shared

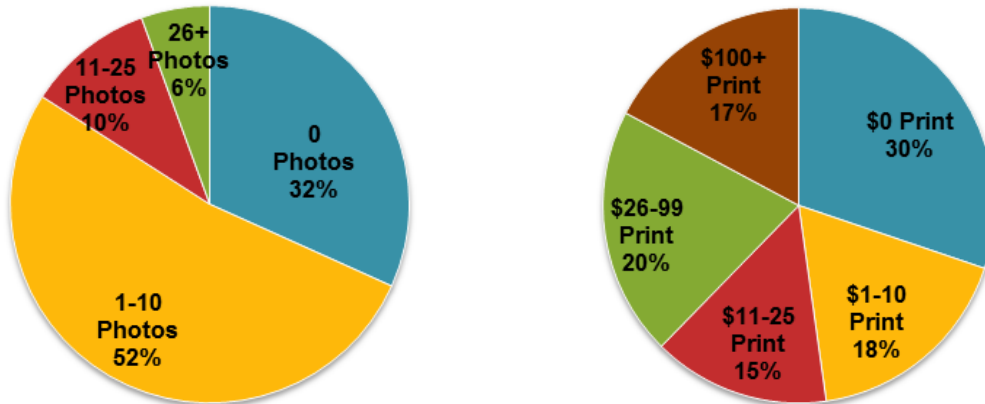


Base: Online U.S. adult photographers age 50 and above (n=320); Online U.S. adult photographers under age 50 (n=688)

Q9: How have you shared your digital photos with others in the PAST 12 months?



Figure 4: Number and Money Spent on Printing



Base: Online U.S. adult photographers age 50 and above (n=320)

Q18: Approximately how many photographs do you print (or have printed) a typical month? Please provide your best estimate.

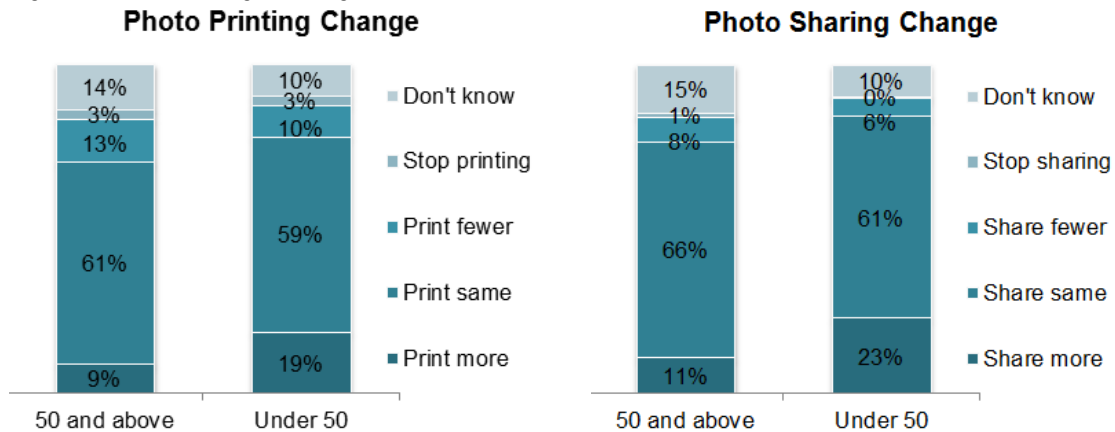
Q19: Approximately how much money do you spend on printing photos a year?

Future of Photo Printing and Sharing

As with those under 50, most U.S. photographers 50 and above are likely to print and share the same number of photos in the next year. However, U.S. photographers under 50 are more likely to print and share more of their photos in the next twelve months. In addition, younger photographers are more likely to demand new features on future digital imaging devices, but there remain opportunities to appeal to older U.S. photographers.

- Printing and sharing of photos among U.S. photographers 50 and above is likely to hold steady over the next year, as most are likely to print (61%) and share (66%) the same number of photos. However, U.S. photographers under 50 are about twice as likely to print (19% to 9%) and share (23% to 11%) more of their photos in the next twelve months.
- When it comes to new features, older U.S. photographers are less likely than their younger counterparts to be interested in new camera features. However, there are still a few features that interest many U.S. photographers 50 and above. Most would like to be able to email (58%) and edit (53%) photos directly on a camera. Furthermore, roughly half of U.S. photographers 50 and above (49%) would be interested in a built-in phone editing app on a camera.

Figure 5: Future Photo Printing and Sharing



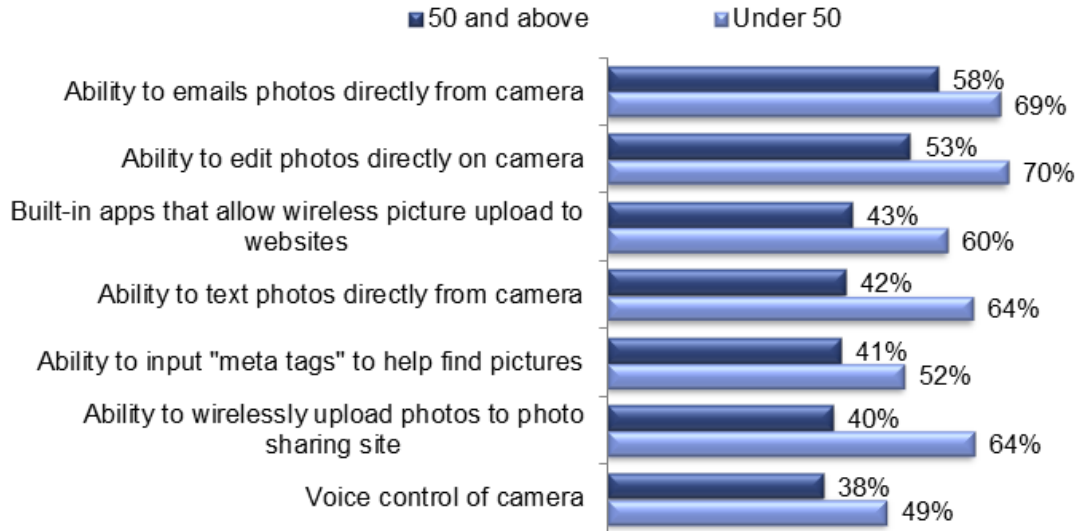
Base: Online U.S. adult photographers age 50 and above (n=320); Online U.S. adult photographers under age 50 (n=688)

Q25: Thinking about the next twelve months, do you see yourself printing more, fewer or the same number of photos than you have in the past 12 months?

Q30: And thinking about the next twelve months, do you see yourself sharing more, fewer or the same number of photos with others than you have in the past 12 months?

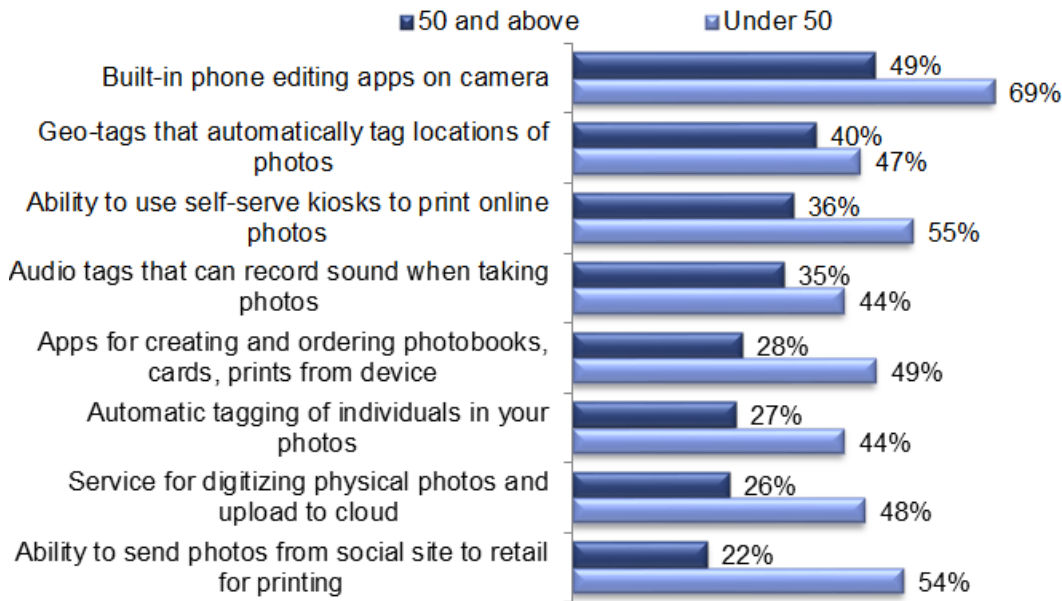


Figure 6: Interest in Digital Picture Device Features



Base: Online U.S. adult photographers age 50 and above (n=320); Online U.S. adult photographers under age 50 (n=688)
Q36: Generally speaking, how interested are you in each of the following features that some digital picture devices might have now or in the future? (% Somewhat or Very Interested)

Figure 7: Interest in Other Digital Picture Device Features



Base: Online U.S. adult photographers age 50 and above (n=320); Online U.S. adult photographers under age 50 (n=688)
Q37: How interested are you in the following features that some digital picture devices might have now or in the future? (% Somewhat or Very Interested)

In Summary

- Due in large part to the widespread adoption of the smartphone, the digital imaging market has become increasingly fragmented in recent years. However, U.S. photographers age 50 and above have been less susceptible than younger photographers to switch from digital point and shoot cameras to the cameras on their smartphones. About half of those 50 and above consider a point and shoot camera to be their primary imaging device, while only 15% consider a smartphone to be their primary device.



- Older photographers tend to be less active. U.S. photographers 50 and above take fewer photos, share fewer photos electronically, and print fewer photos than those under 50. U.S. photographers 50 and above take an average of 23 photos monthly, print 8 photos monthly, and only two in five (40%) post their photos to social networking sites. On the other hand, U.S. photographers under 50 take an average of 54 photos monthly, print 13 photos monthly, and two in three (68%) post their photos to social networking sites. Furthermore, a majority of older photographers say that they will print (61%) and share (66%) the same number of photos in the next year.
- Even though U.S. photographers 50 and above have lower digital imaging engagement than those under 50, there are still opportunities to better appeal to older consumers. Most U.S. photographers 50 and above would like to be able to email (58%) and edit (53%) photos directly on their camera, while about half (49%) would be interested in a built-in phone editing app on their camera. Enhancements in these features should have a trickle-down effect on the printing and sharing behavior of older photographers.



Methodology

The report described herein was designed and formulated by the Consumer Electronics Association (CEA)®. Data from this analysis brief was sourced from CEA's *Digital Imaging – Photo Sharing and Printing* study. The quantitative study was administered via Internet web form between November 13 and 22, 2012 to 1,126 U.S. adults who own and use one or more digital still photography devices and have taken a digital photograph in the past 12 months (referred to as "photographers" or "digital photographers" in this report). The margin of sampling error at 95% confidence for aggregate results is +/- 3.2%. For Americans 50+ the sampling error is +/- 4.8%.

CEA members can access CEA's *Digital Imaging – Photo Sharing and Printing* report at <http://members.CE.org>.

Non-members may purchase the report which includes analysis and data crosstabs at <http://mycea.CE.org/>

About CEA

The Consumer Electronics Association (CEA) is the preeminent trade association promoting growth in the \$204 billion U.S. consumer electronics industry. More than 2,000 companies enjoy the benefits of CEA membership, including legislative advocacy, market research, technical training and education, industry promotion, standards development and the fostering of business and strategic relationships. CEA also owns and produces the International CES - The Global Stage for Innovation. All profits from CES are reinvested into CEA's industry services.

1919 S. Eads St.
Arlington, VA 22202

Tel: 866-858-1555 or 703-907-7600
Fax: 703-907-7675

Market Research & Library
Tel: 703-907-7763
Fax: 703-907-7769
info@CE.org

Find CEA online at www.CE.org.

About AARP

AARP is a nonprofit, nonpartisan organization with a membership that helps people age 50 and over have independence, choice and control in ways that are beneficial and affordable to them and society as a whole, ways that help people 50 and over improve their lives. Since 1958, AARP has been leading a revolution in the way people view and live life.

About AARP's Innovation@50+ initiative:

The Innovation@50+™ initiative aims to spark entrepreneurial activity across public and private sectors. Anchored by the AARP social mission – to enhance the quality of life for all as we age – the initiative enlists the expertise of visionary thinkers, entrepreneurs, the investment community, industry and not-for-profits to spur innovation to meet the needs and wants of people over 50.

On the ground, the initiative catalyzes research and helps shape a marketplace ethos by promoting core, unifying principles such as "design for all." It stimulates new business models that reflect the broad transformation in how the 50-plus life is being re-imagined. Lastly, the initiative prepares 50-plus people to communicate with, access, engage and thrive in a new "longevity economy."

For more information please visit: www.aarp.org/innovation50plus