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Multi-Client

## Worldwide Mobile Imaging: Stimulating Demand and Usage

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### Project Objectives

This study is designed to help digital camera and mobile handset manufacturers; wireless service providers; and photo printing equipment, services, and supplies vendors succeed in this market. The key objectives of this report are to:

- Segment and profile the market
- Understand consumer behavior, perceptions, and requirements
- Assess consumer trade-offs for camera phone features, style, and price
- Assess the opportunity and requirements for printing at home, online, and at retail
- Size and forecast the worldwide market opportunity by key regions
- Estimate the impact on digital still cameras
- Determine pricing and positioning strategies
- Identify product and service requirements and pricing alternatives

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Key questions that this study addresses include:

- What do camera phone owners do with the images they capture?
  - How many images do camera phone users capture? Do they store and edit images on the phone, at online photos services, and/or on their PCs? To what extent are consumers sending photos over the wireless network in photo messages? Are they printing their camera phone photos?
- How does camera phone activity compare to DSC activity?
  - In what situations do consumers use a camera phone versus a DSC? How will advances in technology (image quality, transmission speed, storage) affect when camera phones and DSCs are used? How many images do users capture, share, store, and print?
- How does camera phone and DSC activity change over time?
  - Does usage of the camera drop off after a certain time period? Do consumers send more or fewer images? Why does usage activity change? Do consumers use other services? Has DSC activity changed since owning a camera phone?
- How will camera phones impact the sales of digital still cameras (DSCs)?
  - What are the differences by key geographic regions and market segments? Do consumers own a camera phone and a DSC, or do they choose one or the other? Will camera phones supplement or replace DSCs? When? Why?
- Do consumers want to print from camera phones?
  - What are their expectations of print quality? Where do they want to print camera phone images (home, online, retail)? What features or services would encourage more printing?
- What will encourage consumers to print more images?
  - How will improved image quality and display technology affect the desire to print? What impact will convenience have on printing in the home, via online photo services, at retail locations, and/or at kiosks? What impact will flash memory, Bluetooth, 3G, WiFi, and other initiatives have on camera phone and printer equipment designs and business models? What will be the revenue implications?
- What imaging features do consumers want and value on their camera phones?
  - What is the interest level in advanced imaging features (i.e. megapixel resolution, video capture, flash and zoom, editing, Web storage, wireless print)? How interested are consumers in camera functions vs. other features (i.e. video, games, Web access, music)? What are the key trade-offs that consumers consider between price, performance, and style (form factor) when selecting camera phones?
- What is the interest level in camera phones from non-owners?
  - What is the profile of non-owners? Why have they not purchased yet? What is their purchasing intent and purchasing timeframe? What would entice non-users to purchase a camera phone sooner? Are camera phone sales first-time mobile phone sales or replacement handset sales?
- What are the key regional differences affecting opportunities for mobile imaging?
  - What is the impact of the availability of high-speed wireless transmission, Internet penetration, use of home PCs and photo printers, demographics, and other factors? What are the key regulatory issues affecting camera phone usage and design factors?

- Where are there opportunities to capture revenue streams from camera phone capabilities?
  - To what extent will consumers pay for advanced services? Will advanced imaging features drive up average revenue per customer? What pricing strategies should handset manufacturers and carriers pursue? Where do attractive alliance opportunities exist to create differentiation and competitive advantages?

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