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PRESS RELEASE

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Camera & Imaging Products Association (CIPA)

Results of “Integrated Survey of Photo Imaging Market: Japan Edition”

The Camera & Imaging Products Association (CIPA: President Shigeki Ishizuka) conducted the Integrated Survey of Photo Imaging Market: Japan Edition, targeted at digital camera users (Outsourcing Contractor BCN Inc.: President Yoshie Okuda).

In the October 2020 survey which was conducted two years ago, we received lots of positive comments from respondents even in an unforeseeable time with the COVID-19 pandemic, or rather because of such a hard time, like “I am glad that I have my camera,” “My camera supported me” and “I enjoy shooting with cameras more than before.” These comments also implied how robust the value of existence and needs of cameras were.

The latest survey was conducted in October 2022, which was a delicate time when we were witnessing signs of the pandemic coming around again after having cooled down in early summer. Even in such a situation, the survey results convinced us that cameras have continued to be powerful products. We share the results with the public in order to communicate them to more people, not only those within the industry, and in the hope that this will provide opportunities for those who are not aware of the fun of taking photos with a camera to become aware of it.

Outline of the “Integrated Survey of Photo Imaging Market: Japan Edition”

1. Survey method
Web survey
2. Duration of survey
Early October 2022
The survey was conducted immediately before Japan’s National Travel Support campaign began.
3. The subject of the survey
Females and males residing within Japan, aged from 10s to 70s.
The survey was targeted at digital camera users (those who purchased a camera in the past six months + those who took more than 30 photos with a digital camera in the past six months).
4. The number of samples
1,000 (main survey), 14,306 (preliminary survey)

Outline of Result of “Integrated Survey of Photo Imaging Market: Japan Edition”

The survey consists mainly of multiple choice questions, but we will discuss free-text answers of respondents to begin with because, compared to answers to multiple choice questions unilaterally prepared by us, free-text answers are even easier to understand their thoughts and provide a wealth of findings.

● **Digital cameras can capture/are suitable for the desired subject... that is why I use them.**

What makes you to continue to use cameras for shooting, although you have a smartphone? We strongly believe the value of cameras but asked this question in an open-ended manner to make sure of it through comments of users.

| Free-text answers: Thoughts about cameras | | |
|---|-----------|---|
| Comments classified into answer groups by content: Top 10 ranked answers | | |
| “Please tell us about your thoughts about cameras: how much you like taking photos and videos; how to enjoy photos and videos; your ideas of how to make use of cameras; what cannot be done with a smartphone; and what is good by having a camera.” | | |
| 1st | 104 users | Cameras can capture/are suitable for the desired subject |
| 2nd | 60 users | Cameras have big/key differences from smartphones |
| 3rd | 51 users | For memory’s sake |
| 4th | 46 users | To enjoy/enjoy the feeling of taking photos |
| 5th | 45 users | Changing lenses and zooming |
| 6th | 44 users | High picture quality/resolution |
| 7th | 33 users | Good battery life, storage media and connectivity with a PC |
| 8th | 29 users | Photography is my hobby/meaning of life |
| 9th | 26 users | Capability of expressing myself, range of expression |
| 10th | 25 users | Taking a photo quickly/easily |

For free-text answers, “Cameras can capture/are suitable for the desired subject” came in 1st place. Some respondents answered the cases where not smartphones but cameras can do to take photos and others answered the cases where a digital camera can capture far better photos than a smartphone.

● **Desired subjects... “Digital cameras can capture them.”**

- ▶ “Smartphones cannot take satisfying level of photos of athletes.” (19, female)
- ▶ “Cameras can capture the night sky full of stars. They can also capture fast moving subjects.” (23, male)
- ▶ “As my smartphone does not provide manual control over shutter speed. I use a digital camera to photograph moving subjects and enjoy taking such photos.” (24, female)
- ▶ “Smartphones are not suitable for photographing night views and fireworks.” (42, male)

- ▶ “Smartphones cannot be used to take photos in the water. I enjoy taking photos of appearances and ecologies of underwater creatures.” (58, female)
- ▶ “Looking through a camera finder lets me take photos of moving subjects stably such as people and vehicles, and helps me fix the framing, which is beyond the capability of smartphones.” (59, male)
- ▶ “When taking photos of a fast-moving subject, using an SLR camera, the shutter speed of which is faster, reduces blurring of the subject.” (61, female)

These comments would not be surprising, because taking photos of moving subjects and shooting in the dark conditions are well-established weaknesses for smartphones. To address these weaknesses, some high-end smartphones employ special approaches such as software processing or embedding as large a sensor and lens as possible into their bodies. However, we should be aware that digital cameras let us take such photos stress-free, and this is quite common to them.

Digital cameras let me adjust shutter speed - this comment is just what users are fully aware of. When photographing a dog running around, a moving train or fireworks, the picture will be completely different depending on what shutter speed you select; to freeze action or capture dynamic movement intentionally, and a digital camera allows you to capture the image just as you intended.

By looking through a camera finder for shooting, users can feel stability and fix the framing easily. This experience is an absolute advantage delivered from a characteristic specific to digital cameras resulting from their quite common function, that is, taking photos.

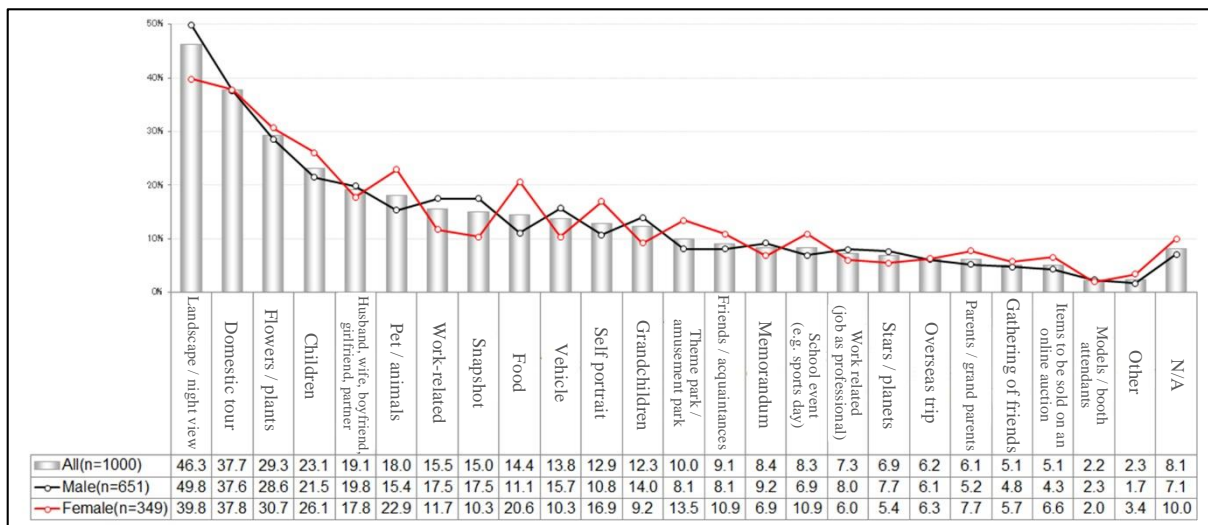
● **Desired subjects... Digital cameras can capture far better photos.**

- ▶ “I used to travel a lot before the COVID-19 pandemic, always carrying my camera with me. I mainly take photos of landscapes. Digital cameras produce images at a higher quality than smartphones and printed photos are clear and sharp.” (37, female)
- ▶ “I did not take photos at all before I have a child, but now I enjoy taking photos because I do not want to miss anything with my child growing up in his/her life.” (51, male)
- ▶ “I want to take photos of many lovely cats. I think there are many elements that can be captured only by cameras, such as lively cats and beautiful close-ups of their faces.” (53, female)
- ▶ “I use an interchangeable lens camera to take photos of concerts, which is my hobby, in order to capture beautiful images that I want.” (58, male)
- ▶ “Cameras are suitable for taking photos of flowers.” (61, male)
- ▶ “I take photos with my camera while on a trip or walking and post them on my blog. As the quality of images taken by smartphones is not so good, I use my smartphone only as an auxiliary tool.” (69, male)
- ▶ “I mainly take photos of flowers with an SLR camera. I like using it because it delivers sharp images and gives me the fun of manual operation.” (72, female)

Digital cameras are indispensable for hobbies, what cannot be compromised, what they love and those whom they love.

As results of multiple choice questions, the ranking of photographic subjects is given below.

✓ Ranking of subjects people take photos of with digital cameras



“Landscape/night view” came in 1st place, followed by “Domestic tour” (2nd) and “Flowers/plants” (3rd). “Domestic tour” which had ranked 3rd in the previous October 2020 survey switched the place with “Flowers/plants” which had ranked 2nd.

We can see a recovery from the situation where people could not go out, but “Overseas trip,” which is an arena for digital cameras to exercise their abilities, still appears to the right side of the graph, and at least as of October 2022 it remained at a low rank.

When looking at the results by gender, the photographic subjects that scored higher in male than in female are “Landscape/night view,” which was 10 points higher, “Husband, wife, boyfriend, girlfriend, partner,” “Work-related,” “Snapshot,” “Vehicle,” “Grandchildren” and the like.

Meanwhile, the subjects that scored higher in female than in male include “Flowers/plants,” “Children,” “Pet/animals,” “Food,” “Self portrait” and “Theme park/amusement park.” “Flowers/plants,” at the top rank in female, scored only approximately two points higher than in male.

“Flowers / plants” kept attracting camera users as photographic subjects even in the midst of the COVID-19 pandemic and remained popular among both male and female. They are photographic subjects symbolic for digital cameras, boasting immovable presence.

CIPA will hold a photo contest for the period from spring to summer 2023, with the theme of flowers.

● **“Cameras have big/key differences from smartphones.”**

The second most-common answer to the open-ended question was “Cameras have big/key differences from smartphones.” Comments that refer to other matters are also listed below if they include clear differences between cameras and smartphones.

- ▶ “I don’t think smartphones are capable of drawing out the charm of photographic subjects in a true sense.” (20, male)
- ▶ “Although smartphones, after a pile of enhancements, have become capable of capturing images as if taken by an SLR camera, the photos still look flat, which is peculiar to smartphone photography. Low-cost SLR cameras are focusing more on photography than smartphones with high specifications.”(21, female)

- ▶ “I think it difficult to capture the images of sunset, sky with stars and the moon accurately as I see with a smartphone. When taking photos of sunset with my smartphone, I often wonder “why cannot the smartphone camera catch the colors of this beautiful red sunset?” Some people say that latest smartphone cameras are superior to digital cameras, but I don’t think so at all. Certainly their great quality, in spite of light weight, is unbelievable. Having said that, they are still inferior to digital SLR cameras.” (22, female)
- ▶ “Smartphones may deliver images adjusted/processed in an unnatural manner, while cameras let me take natural photos of a scene just the way it is.”(28, female)
- ▶ “I often take photos with my camera while watching sports. They can capture energetic scenes that smartphones cannot.” (36, female)
- ▶ “In a photo taken by a smartphone, people at the edge of the frame look bigger, but not by a digital camera. I can take photos of person(s) placed at the edge without distortion.” (39, female)
- ▶ “As my camera can capture scenes more vividly, I am happy with it.” (46, male)
- ▶ Cameras can capture fine details such as colors of flowers. The coloring is also great. Smartphones can produce quality images to some extent, but are no match for SLR/mirrorless cameras.” (52, female)
- ▶ “I can use my camera freely to take photos like a part of my body.” (61, male)
- ▶ “It is difficult to take macro photography with a small lens on a smartphone. I cannot take photos of insects and tiny flowers without my camera. (68, male).

Photos taken with digital cameras are “vivid” and “natural-looking.”

Comments similar to them are, other than those listed above, “sense of depth,” “close to what I see,” “realistic,” “gives me a sense of realism” and “deep depth.”

● **“For memory’s sake”**

In 3rd place in the open-ended question was “For memory’s sake.”

This tends to be taken for granted because people use cameras to capture scenes in photos. Keeping precious memories alive has continued to be a motto and seems to have increased its importance through the COVID-19 pandemic.

- ▶ “The picture quality is good. I can keep my precious moments safe.” (22, female)
- ▶ “When I looked back at my photos, although I had just captured a casual moment or a scene of ordinary everyday life when taking them, they brought me back my memories of the very happy and precious time, made my heart warm and cheered me up. So, I want to capture casual moments and ordinary everyday life in photos.” (39, female)
- ▶ “I am glad that I have my camera and can keep my wonderful moments. (43, female)

● **“To enjoy/enjoy the feeling of taking photos”**

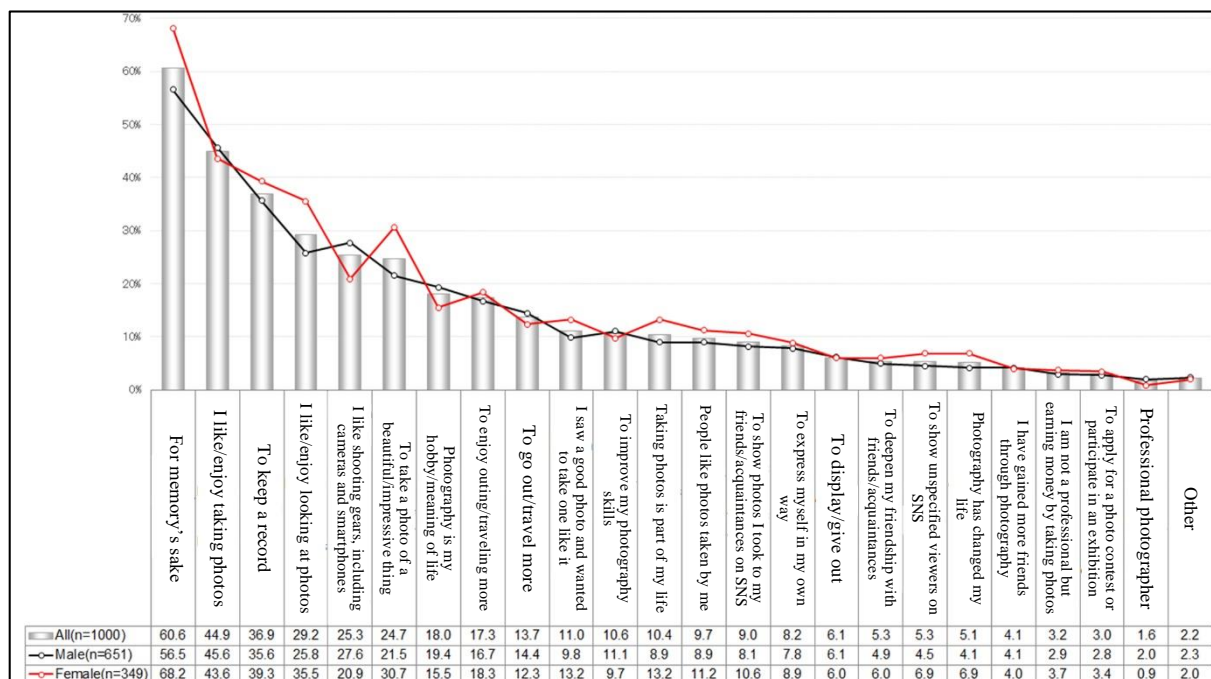
In 4th place was “To enjoy/enjoy the feeling of taking photos.”

- ▶ “With my camera, I can get more sense of taking photos than with a smartphone, which gives me a pleasure.” (18, male)
- ▶ “Exciting me.” (23, male)
- ▶ “To photograph what I want to. I enjoy going to the place, checking the effects of directional lighting there and consider how I can create the best images I want” (29, male)
- ▶ “The act itself of taking photos with a camera is fun to me.” (36, male)
- ▶ “With my camera, I find myself enjoying taking photos.”(38, female)
- ▶ “There are discoveries that usually pass unnoticed, which makes my memories colorful.” (39, female)
- ▶ “The act itself of taking photos with a camera is fun to me.” (51, female)
- ▶ “When using my camera, I go to the place of taking photos with a sense of purpose.” (69, male)
- ▶ “I try various ways and techniques to find how to capture beautiful shots.” (72, male)
- ▶ “When I have an idea of where and what settings to take photos, I will make use of cameras rather than smartphones. (70, female)
- ▶ “A camera lets me focus on taking photos carefully.” (77, female)

Including “Exciting me” and “The act itself of taking photos with a camera is fun to me,” there are comments which also apply to the reasons for choosing digital cameras.

Results of a multiple choice question asking reasons (motivations) for taking photos are given below:

✓ **Ranking of reasons (motivations) for taking photos**



For this question, “For memory’s sake” and “I like/enjoy taking photos” were at the top rank again. However, the results were different from the ones for the open-ended question in terms of “To keep a record” put at the top, because, while the open-ended question included comparison to smartphones as one of viewpoints, this question just asked the reasons for taking photos.

By gender, the proportion of those who responded “For memory’s sake” was more than 11 points higher in female than in male. While the proportion of those who responded “I like/enjoy taking photos” was slightly higher in male than in female, the proportion of those who responded “I like/enjoy looking at photos” was more than 9 points higher in female than in male.

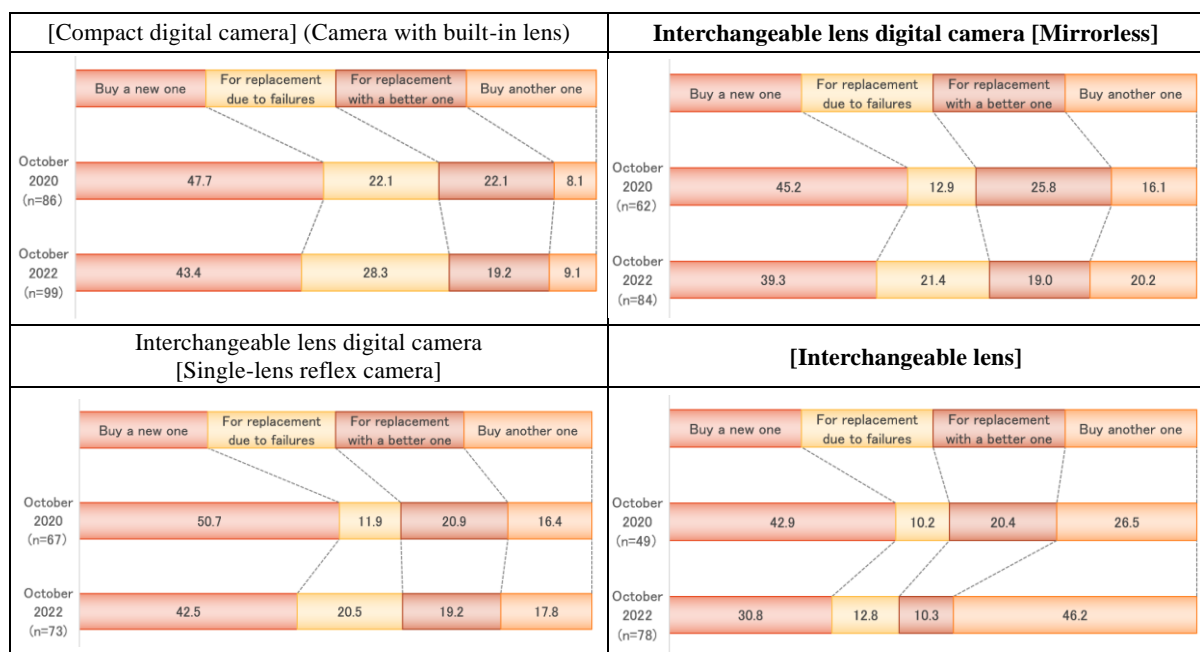
● **“Changing lenses/zooming” and “High picture quality/resolution”**

In 5th place was “Changing lenses/zooming” and in 6th place was “High picture quality/resolution”. Currently, interchangeable digital cameras, which are mirrorless and SLR cameras, account for three-quarters of the digital market.

- ▶ “It is good that cameras let me zoom in without my photos becoming blurred.” (30, male)
- ▶ “I can take photos from a distance with my camera as it can produce clear images.”(34, female)
- ▶ “It supports a variety of lenses from close-up to telephoto.” (47, female)
- ▶ “Cameras are quite different in performances such as macro photography and zoom accuracy. It is also attractive to change lenses.” (54, male)
- ▶ “I can shoot more beautiful pictures with a digital camera ” (19, female)
- ▶ “I think cameras are superior in picture quality.” (21, female)
- ▶ “Cameras can capture more clear images than smartphones ” (22, female)

✓ **Breakdown of reasons for purchasing digital cameras and interchangeable lenses**

Targeted at those who bought a digital camera or lens within six months before the survey (from spring to fall 2022), we asked the reason for purchase.



The proportion of those who purchased another interchangeable lens (A lens that can be attached to Mirrorless or SLR camera) was high at 26.5% in the 2020 October survey, and reached 46.2% in the October 2022 survey.

We should not easily react to the results as the target respondents of this question was limited only to those who bought an “interchangeable lens” within the six months. However, the results strongly suggest how deeply people get addicted to capture the subject through changing to the most suitable lens.

● **“Good battery life, storage media and connectivity with a PC”**

In 7th place was “Good battery life, storage media and connectivity with a PC.” From a perspective different from picture quality, respondents identified advantages of cameras such as no difference in the price of camera main bodies depending on their built-in memory capacity - satisfying the storage requirements by using a memory card; and a long battery life allowing plenty of time for shooting.

For digital cameras these are so natural that users would not need to care about them and all you have to do is just focusing on shooting, but this does not necessarily apply to smartphones. To do so, smartphone users may need to invest in a device with a larger internal memory and buy/carry with you an external battery, imposing additional costs and burdens on them.

- ▶ “With a storage device, I can enjoy taking photos without worrying about remaining memory capacity.” (19, female)
- ▶ “By saving photos I took on an SD card, I can easily organize/retouch them on a PC. (A file manager app on a smartphone is hard to use.) In addition, by using it and my smartphone according to purposes, I can save the battery and storage capacity on my smartphone. (24, female)
- ▶ “I need to be careful of battery and other capacities on my smartphone, but my digital camera lets me shoot in high quality without worrying about them.” (25, female)
- ▶ “I can focus on shooting without worrying about charging my smartphone battery.” (32, female)
- ▶ “It is easier to organize data on my camera.” (41, male)
- ▶ “Good battery life and storage capacity.” (53, male)
- ▶ “After taking photos with my camera, I can soon edit them on another device.” (61, male)
- ▶ “It is troublesome the battery runs out quickly while I am taking photos with my smartphone.” (75, female)

● **“Photography is my hobby/meaning of life”**

In 8th place was “Photography is my hobby/meaning of life.” It came in 7th place for the previous question “Reasons for taking photos,” which is almost the same level as for this question. We receive each and every word of comments from the respondents as valuable inputs.

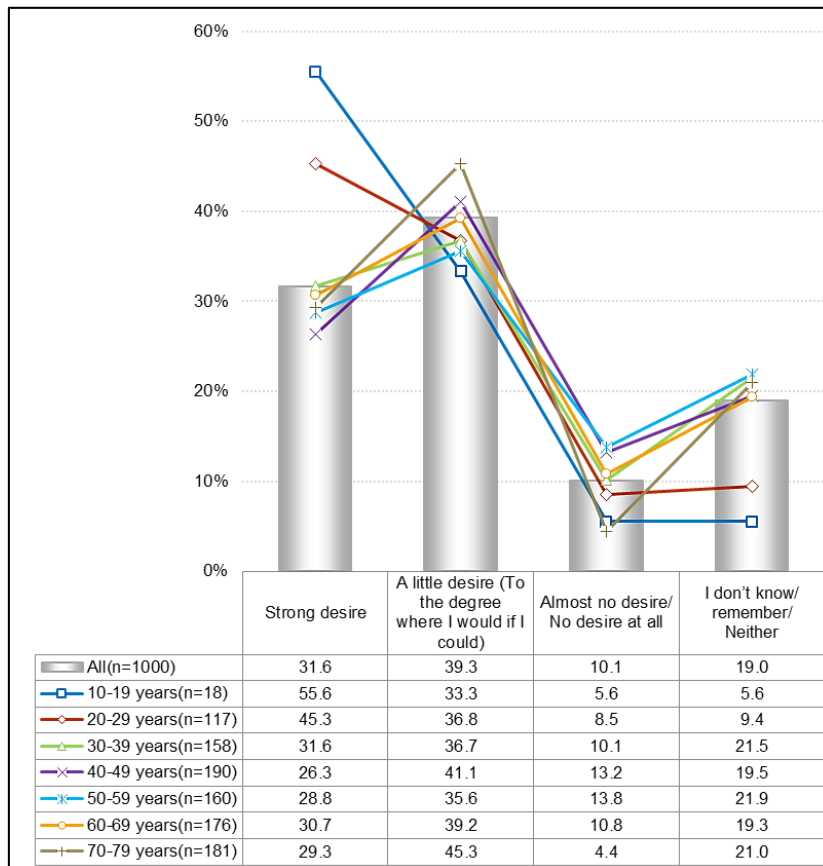
- ▶ “Taking photos has become a hobby of mine.” (18, male)
- ▶ “Photography makes me enjoy my everyday life. I can find something new.” (20, male)

- ▶ “The greatness of photography is that I can share the scenes I saw from my perspective with others, and if people like them, it gives unmatched pleasure to me.” (26, male)
- ▶ “I have found a reason for living and now enjoy my life. (37, female)
- ▶ “With a PL filter, strobe, lens hoods and interchangeable lenses, I can take quality photos at most of destinations while traveling. Through shooting the subjects in which I am interested such as buildings, landscapes and Buddha statues, I wanted to learn photography more and decided to take the Photo Master Test.” (42, male)
- ▶ “It serves as a communication tool with others.” (49, female)
- ▶ “To build friendships. A new hobby” (53, male)
- ▶ “I have been taking photos for 50 years. I have a blog post mainly with my photos of flowers. Through the blog, I have connected with a variety of people.” (59, male)
- ▶ “It is of interest to me that a photograph of the scene captured through the lens looks different from what my eyes see or looks like implying something different. Cameras produce such a delicate flavor which cannot be obtained through shooting with a smartphone. Macro and telephoto lenses allow photographing what the naked eyes can never see. Everyday is a new fun and I feel excitement. I am a patient with an intractable disease, but I can forget pain and agony while using my camera and editing the images I took. I had never thought that the camera was such an attractive device. It was the blog of a stranger that made me interested in cameras and photos. The blogger visits my clumsy blog and leaves comments, including tips for shooting. The photography has given me great fun.” (60, female)
- ▶ “I go into the forest to take photos of squirrels, pleasing to my grandchild.” (61, male)
- ▶ “I really love cameras.” (66, male)

✓ **Desire to take photos: As of October 2022**

People tend to think that the digital camera market is affected by smartphones, but it is just one aspect. Another aspect is that, now that everyone has a smartphone in hand, people have stronger desire to take even better photos and potential demand for digital cameras has substantially increased.

People tend to think that only elderly people are interested in digital cameras, but we found young people’s enthusiasm for digital cameras in many part of the survey results. We can see the story that the iGen, which is short for the Internet Generation, pick up a digital camera after taking an important step of using smartphones, and that is why they become more eager and are driven to. Results of the multiple-choice question “Desire to take photos” are given below.



The proportion of those responded “Strong desire” was significantly high in those aged 29 or younger.

● **“Capability of expressing myself, range of expression” and “Taking a photo quickly/easily”**

In 9th place was “Capability of expressing myself, range of expression” and in 10th place was “Taking a photo quickly/easily.”

- ▶ “Adjusting the color tones before taking photos excites me.”(25, female)
- ▶ “A camera lets me express myself easily.” (28, female)
- ▶ “I can see a beautiful world that does not appear to my eyes.”(38, female)
- ▶ “I like cameras because they let me adjust detailed settings.” (53, female)
- ▶ “I can take photos quickly.” (23, male)
- ▶ “I can focus a camera precisely.” (46, female)
- ▶ “Significantly easy operation.” (50, female)
- ▶ Framing is easier with a camera than with a smartphone.” (61, female)

As we saw earlier as part of the answer “Cameras have big/key differences from smartphones,” there were comments such as “natural-looking” and “vivid.” Here, however, there was a comment in contrast with them, “A beautiful world that does not appear to my eyes.”

● **Some people are in favor of smartphones.**

This survey was targeted at digital camera users and thus there were many comments in favor of digital cameras. Even in such an out-of-place situation for smartphones, we saw some comments in favor of them.

Comments in favor of smartphones

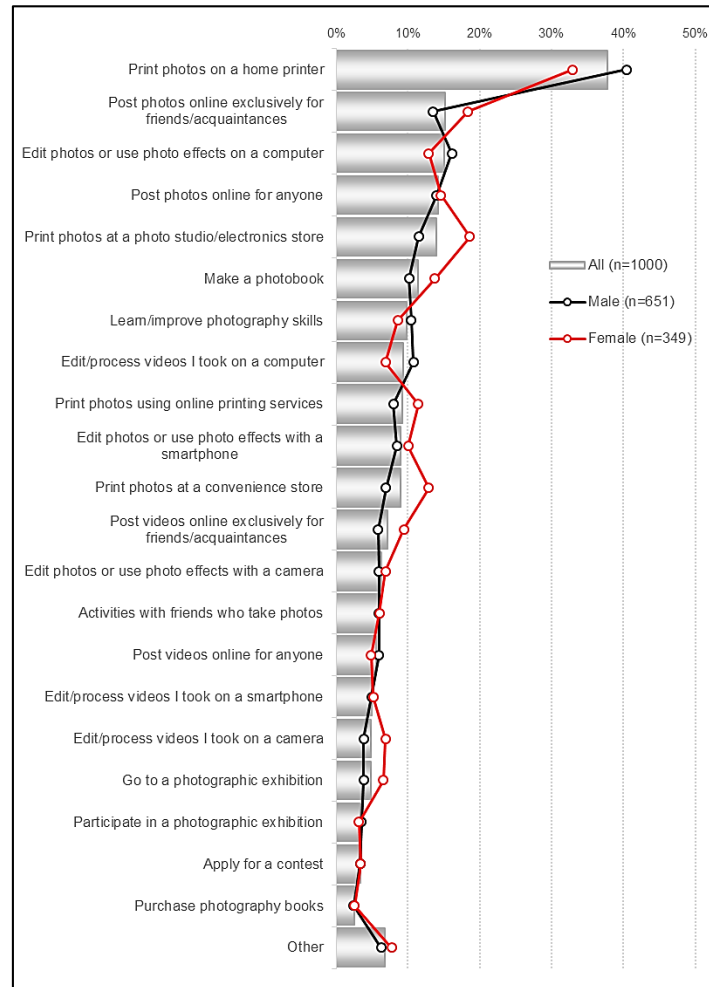
- ▶ “Cameras take better photos than smartphones, but smartphones are easier to use and more useful for photo retouching. (32, female)
- ▶ “On a parents day at school, shooting with a camera is unwelcome to people, but they tolerate being shot with smartphones.” (47, female)
- ▶ “A smartphone makes it easier to take a selfie when I want to take a photo of myself for memory but have no one to press the shutter release button. This is of great advantage.” (53, male)

Comments of those who use a digital camera or a smartphone depending on their needs

- ▶ “There is no difference on how to enjoy photos between a camera and a smartphone, but I pick up my camera as much as possible for better picture quality when taking photos of my children as I print them out and put them into my photo album every month. (38, female)
- ▶ “I have liked taking photos of landscapes and grass flowers on the road side, always carrying my camera with me. After I had a child, I have come to take photos mainly of everyday moments as well as him/her to keep track of his/her growth. A smartphone is useful because it is light to carry around and lets me take photos anywhere at home or outside, share them with my family and post to SNS easily. For digital cameras (SLR), the picture quality is overwhelmingly better than that of smartphones, and their optical zoom and a variety of shooting modes are attractive. A digital camera is a must-have when I take photos of distant landscapes and school events. Each of digital cameras and smartphones has their own advantages. I use my digital camera or smartphone depending on the situation and it fits my style of life. (41, female)
- ▶ I use compact digital cameras to take records of underwater creatures. To identify what the creature is, it is necessary to take pictures of it. I take videos of reproductive behavior of creatures. I use my smartphone to take photos of everyday moments to post them on SNS. The photos I took, in which surrounding scenery changes with seasons, bring me back memories. (56, female)

✓ How to enjoy photos: Ranking

For the question of how to enjoy photos, we prepared as many answer choices as possible.



Photography offers people various ways of enjoyment, but “Print photos on a home printer” came in 1st place, far away from others.

Factors behind it may include the following: the shift to remote working has led to rushed purchases of printers for use at home; and the act of printing photos out has greatly attracted people’s attention again as one of the ways to enjoy staying at home.

Selected from the results of the survey

We would like to express our gratitude to everyone who participated the survey.

CIPA will hold CP+2023 from Thursday, February 23 (national holiday) to Sunday, February 26, 2023.

More details on the survey results will be presented at the CIPA market seminar in CP+2023.

● Inquiries about this report

Camera & Imaging Products Association CIPA

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