

2002 Online Photo Services End User Survey

Table of Contents (Preliminary 2/21/02)

Executive Summary	1	Name of Online Photo Service Web Sites Visited	45
Introduction	2	Alternative Platforms for Online Photo Viewing	47
End User Study Methodology	2	Use of Online Photofinishing Services	51
Sources of Skew	2	Experience Ordering Prints from a Photo Service Web Site	52
Banner Point Definitions	3	Intent to Order Prints or Photo Merchandise Online Within the Next 12 Months	54
Key Highlights	5	Number of Prints Ordered from a Photo Service Web Site Per Month	55
Demographics	8	Percent of Prints Ordered Online that Were Paid For, Versus Free	56
Demographic Comparison of Online Photo Service Users Vs. Non-Users	10	Percent of Prints Ordered Online that are Sent to Other People	57
Demographic Comparison of Interested Vs. Non-Interested Non Users	13	Sizes of Prints Ordered Online	58
Demographic Profile of Those Who Have Purchased Prints Online	14	Satisfaction with Online Photofinishing Services	59
Household Technology Ownership and Usage	16	Perception of Online Photofinishing Vs. Home Printing	60
Respondents' Approach to New Technologies ..	16	Intent to Order Prints Online Again Within the Next Few Months	64
Technology Ownership	16	Experience Ordering Photo Merchandise Items Online	64
Length of PC Ownership and Amount of Hard Disk Space	19	Non Users' Interest in Photo Service Web Sites	69
Internet Connection Type	20	Non Users' Interest in Specific Features of Photo Service Web Sites	70
Household PC Activities	21	Non Users' Willingness to Pay for Online Photo Services	72
Comparison of Users and Non Users of Online Photo Services	22	Non Users' Concerns about Photo Service Web Sites	72
Use of Online Photo Service Web Sites	26	Recommendations	74
Experience Posting a Photo to a Photo Service Web Site	26	Conclusions	76
How Users Learned About Photo Service Web Sites	28		
Number of Sites to Which Online Photo Service Users Post Photos	30		
Names of Sites to Which Users Post Photos	31		
Length of Usage	33		
Sources of Digital Images that are Posted to Photo Service Web Sites	34		
Features Used	36		
Number of Images Posted to Photo Service Web Sites per Month	38		
Total Number of Photos Stored in Online Photo Albums	39		
Awareness and Usage of Storage Limits, Paid Storage, and Subscription Memberships	39		
Number of People that Online Photo Service Users Invite to View Albums	42		
Location from Where Online Photo Service Users Access Online Albums	43		
Experience Visiting a Photo Service Web Site to View Others People's Albums	45		

2002 Online Photo Services End User Survey

Table of Figures (Preliminary 2/21/02)

Figure 1 – Percent of Photos Posted that Are Printed . 5	Figure 26 – Comparison of Online Photo Service Users and Non Users’ Internet Connection Types23
Figure 2 – Respondents’ Age and Gender..... 8	Figure 27 – Online Photo Service Users and Non Users’ Home PC Activities and Intended Activities for the Next 12 Months.....24
Figure 3 – Respondents’ Geographical Distribution ... 9	Figure 28 – Respondents’ Experience Posting a Photo to a Photo Service Web Site.....26
Figure 4 – Respondents’ Annual Household Income.. 9	Figure 29 – Historical Trend in Percent of Internet Users who have Posted a Photo to a Photo Service Web Site.....27
Figure 5 – Percent of Respondents with Children in the Household..... 10	Figure 30 – Frequency of Online Photo Service Users’ Photo Posting.....28
Figure 6 – Age of Children in Household 10	Figure 31 – How Online Photo Service Users Learned about the Site(s)29
Figure 7 – Average Age of Online Photo Service Users Vs. Non Users 11	Figure 32 – Percent of Online Photo Service Users Who Post Photos to More than One Site30
Figure 8 – Gender of Online Photo Service Users Vs. Non Users 11	Figure 33 – Reasons for Posting Photos to More than One Photo Service Web Site30
Figure 9 – Gender by Length of Usage 12	Figure 34 – Top Photo Service Web Sites Used by Respondents31
Figure 10 – Median Household Income of Online Photo Service Users Vs. Non Users 12	Figure 35 – Reasons why Respondents Chose their Primary Photo Service Web Site.....32
Figure 11 – Percent of Online Photo Service Users and Non Users that are Parents, Grandparents, or Single 12	Figure 36 – Users’ Length of Online Photo Service Web Site Usage.....33
Figure 12 – Online Photo Service Users Vs. Non Users Ages of Children..... 13	Figure 37 – Sources of Digital Images that are Posted to Photo Service Web Sites34
Figure 13 – Demographic Comparison of Interested and Non-Interested Non Users of Online Photo Services..... 14	Figure 38 – Primary Source of the Photos that Users Post to a Photo Service Web Site.....35
Figure 14 – Age of Those who have Ordered Prints Online..... 14	Figure 39 – Features Used on a Photo Service Web Site36
Figure 15 – Gender of Those who have Ordered Prints Online..... 15	Figure 40 – Users’ Main Reason for Posting Photos to a Photo Service Web Site.....37
Figure 16 – Gender of Those who have Ordered Prints Online: by Age Segment..... 15	Figure 41 – Number of Photos Posted to a Photo Service Web Site Per Month38
Figure 17 – Household Income of those who have Ordered Prints Online 15	Figure 42 – Total Number of Photos Stored in Respondents’ Online Photo Albums ..39
Figure 18 – Respondents’ Approach to New Technologies 16	Figure 43 – Percent of Users Whose Site has a Storage Limit.....39
Figure 19 – Respondents’ Technology Ownership 17	Figure 44 – Percent of Users who have Paid To Get More Online Storage.....40
Figure 20 – Products Respondents Intend to Buy in the Next 12 Months..... 18	Figure 45 – Users’ Estimation of Cost for 100MB of Extra Online Storage.....40
Figure 21 – Respondents’ Length of PC Ownership 19	Figure 46 – Respondents’ Willingness to Pay for Online Photo Storage41
Figure 22 – Amount of Hard Disk Space on Respondents’ PCs..... 20	
Figure 23 – Respondents’ Internet Connection Speeds 20	
Figure 24 – Respondents’ Home PC Activities and Intended Activities for the Next 12 Months 21	
Figure 25 – Technology Ownership: Online Photo Service Users Vs. Non Users 22	

2002 Online Photo Services End User Survey

Table of Figures (Preliminary 2/21/02)

Figure 47 – Percent of Online Photo Service Users that Pay a Monthly or Yearly Membership Fee 41	Figure 64 – Percent of Prints Ordered Online that were Paid For, Versus Free 56
Figure 48 – Respondents’ Willingness to Pay a Membership Fee..... 42	Figure 65 – Mean Percent of Prints Ordered Online that were Paid For: 2000 Vs. 2001 57
Figure 49 – Yearly Amount That Respondents are Willing to Pay for a Membership Fee 42	Figure 66 – Percent of Prints Ordered Online Sent to Other People 58
Figure 50 – Percent of Online Photo Service Users Who Invite People to View their Online Albums 43	Figure 67 – Sizes of Prints Ordered Online 59
Figure 51 – Number of People that Online Photo Service Users Invite to View Each Online Album 43	Figure 68 – Users’ Satisfaction with Online Photofinishing Services 59
Figure 52 – Location from Where Users Access their Online Photo Albums 44	Figure 69 – Percent of Online Photofinishing Users that Also Print Digital Photos on a Home Printer 60
Figure 53 – Location Where Users Access their Online Photo Albums: Broadband Versus Dial-up Users 44	Figure 70 – Respondents’ Perceptions of Online Photofinishing Versus Home Printing 61
Figure 54 – Experience Visiting Photo Service Web Sites to View Other People’s Albums..... 45	Figure 71 – Percent of Respondents that Prefer Online Photofinishing over Home Printing for Each Attribute Listed: Breakdown by Online Photo Service Usage, Digital Camera Ownership, and Gender 62
Figure 55 – Names of Online Photo Service Web Sites Visited 46	Figure 72 – Change in Respondents’ Home Digital Photo Printing Since Starting to Order Prints Online 63
Figure 56 – Respondents’ Interest in New Platforms for Digital Photo Viewing..... 48	Figure 73 – Respondents’ Intent to Order Prints Online Again in the Next Few Months..... 64
Figure 57 – Percent of Respondents that are “Highly Interested” or “Somewhat Interested” in New Ways to Receive and View Photos: Demographic Breakdown..... 50	Figure 74 – Percent of Respondents that have Ordered Photo Merchandise Online 65
Figure 58 – Percent of Respondents that are “Highly Interested” or “Somewhat Interested” in New Ways to Receive and View Photos: Online Photo Service Users Versus Non Users 51	Figure 75 – Percent of Online Photo Service Users that have Ordered Photo Merchandise Online 65
Figure 59 – Percent of Total Internet Users Who Have Ordered Prints Online 52	Figure 76 – Photo Merchandise Items Purchased Online 66
Figure 60 – Percent of Online Photo Service Users Who Have Ordered Prints Online 53	Figure 77 – Percent of Respondents that Intend to Order Photo Merchandise Online in the Next Three Months 67
Figure 61 – Percent That Have Ordered Prints Online, Broken Out by Various Segments 54	Figure 78 – Photo Merchandise Items that Respondents Intend to Purchase in the Next Three Months..... 68
Figure 62 – Intent of Those Who Have Not Ordered Prints Online to Order Prints or Merchandise Online within the Next 12 Months 55	Figure 79 – Non Users’ Interest in Trying a Photo Service Web Site 69
Figure 63 – Number of Prints Ordered Per Month from Photo Service Web Sites 56	Figure 80 – Features that Non Users are Interested in Trying on a Photo Service Web Site..... 71
	Figure 81 – Non Users’ Willingness to Pay for Online Photo Services 72
	Figure 82 – Non Users’ Concerns about Photo Service Web Sites..... 73