

PHOTOGRAPHY IN THE AI ERA: TRADITION REVISITED & THE APPEAL OF INNOVATION

Annual study
of photography usage & attitude trends
in France
8th edition

SEPTEMBER
2023

Sociovision contacts

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Study conducted for the Salon de la Photo and the Alliance Française des Industries du Numérique (AFNUM)

SALON
de la
PHOTO



METHODOLOGY



Survey conducted among a sample of 1,000 people aged 15 to 65 who take photos.

- Quotas method including gender, age, region, town size, household size and respondent SEC
- Data collected via an online panel from 6th to 18th July 2023.

Survey conducted yearly since 2015. The 2023 wave is the 8th edition of this barometer study.



01

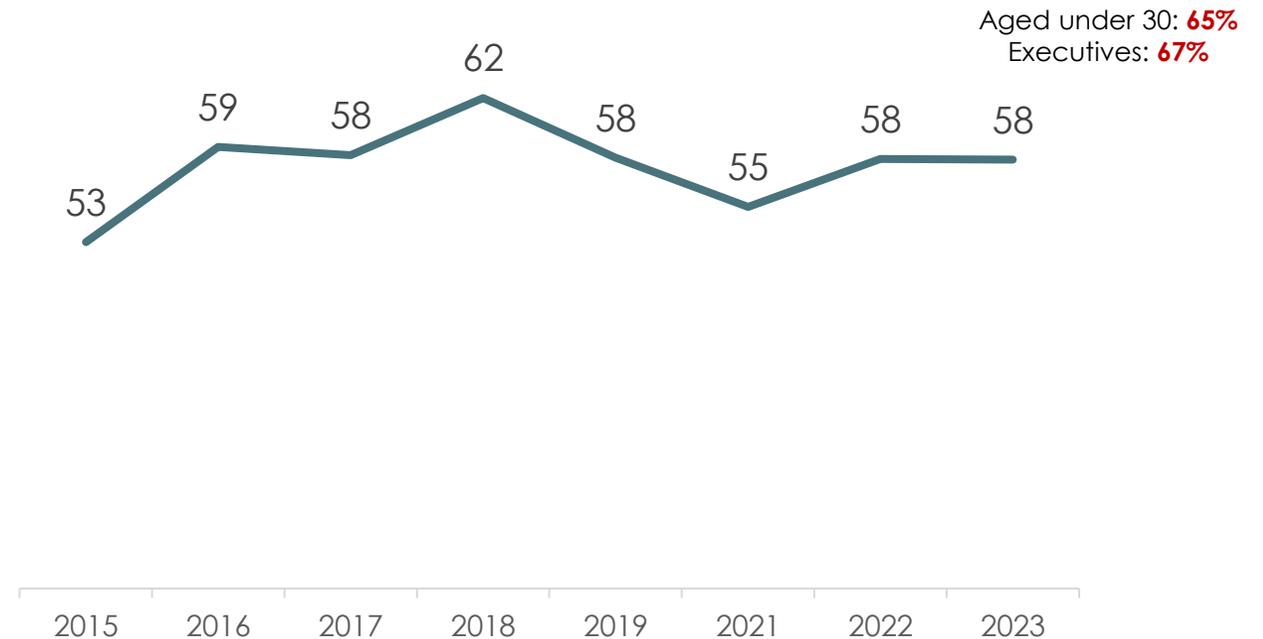
THE PROFILE OF PHOTOGRAPHY ENTHUSIASTS IS NOW STABLE,
VIDEO IS EVERYWHERE



Since 2015, the number of people who feel passionate about photography has not wavered

I am passionate about photography

% Total agree



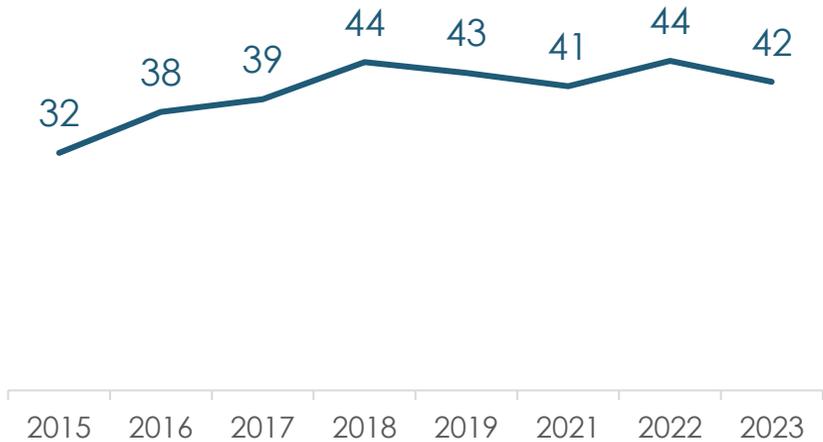
Base: Total who take photos
1,000 resp. aged 15-65

Over-representation vs. Total population
Under-representation vs. Total population

The proportion of experts remains stable from year-to-year

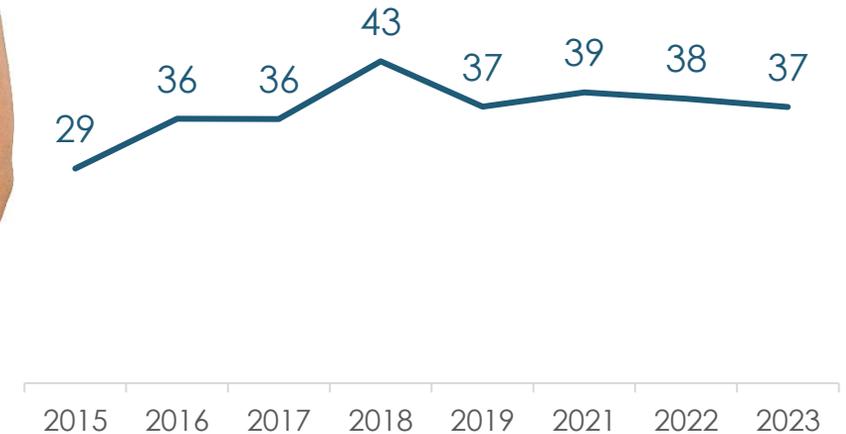
People often ask me for photography tips
(equipment, framing/composition, retouching, printing...)

% Total agree



I consider myself to be an expert
in the field of photography

% Total agree



The majority of people who take photos have already shot video footage, 10% even do so on a day-to-day basis

% TAKE VIDEOS		
On a day-to-day basis	10% Aged under 30: 17% Executives: 17%	-3pts vs. 2022
At least once per week	25%	
Total take videos	68%	Stable vs. 2022
Do not take videos	32%	



Videography is becoming increasingly recreational...

Taking videos is...

Something fun and easy to do

+5pts vs. 2018



Something serious which requires real skills

2018 2019 2021 2022 2023

As well as shooting footage, half of those who take photos also perform video editing

Do not edit videos **50%**



% EDIT VIDEOS

Total edit videos **50%**
Stable vs. 2022

On a day-to-day basis

7%

Men aged under 30: **18%**

Executives: **15%**

Inhab. of the Ile-de-France region: **14%**

At least once per week

17%

Videography tips are increasingly sought for

Which of the following would you most like to receive advice about?

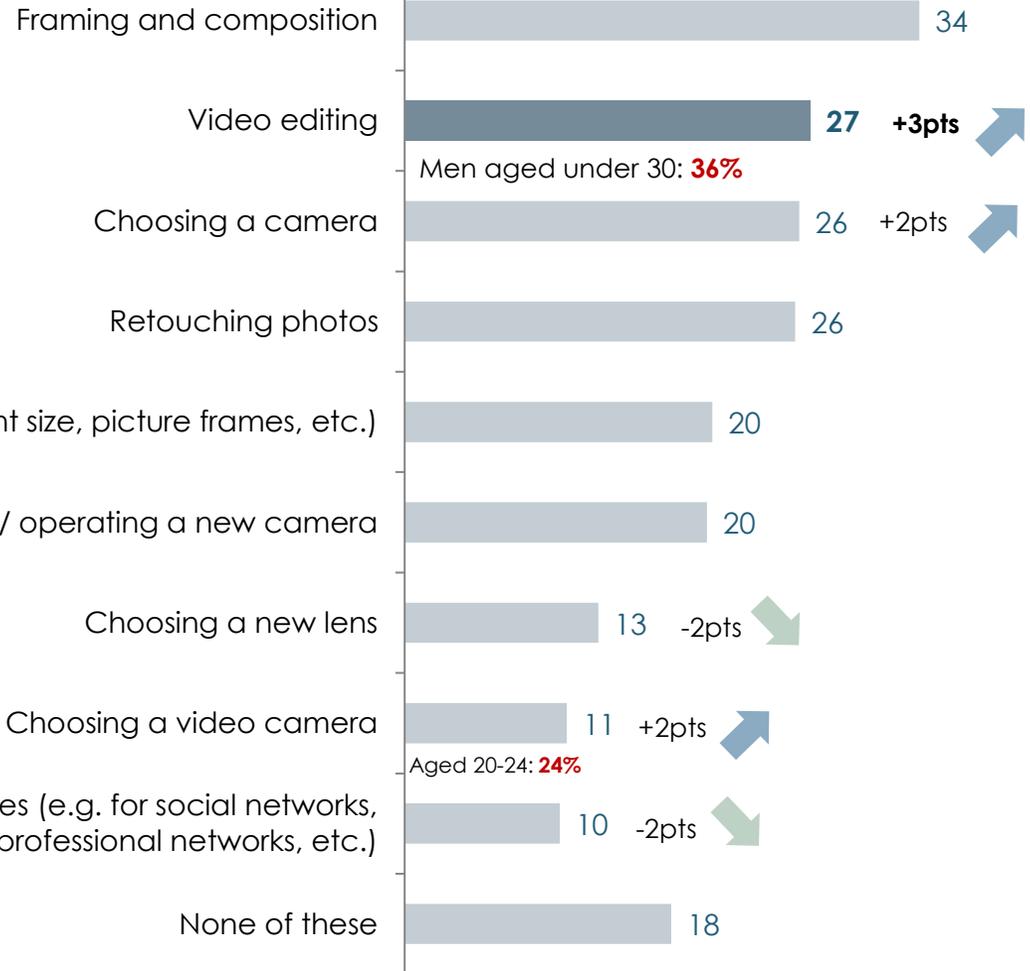
Evolution vs. 2022

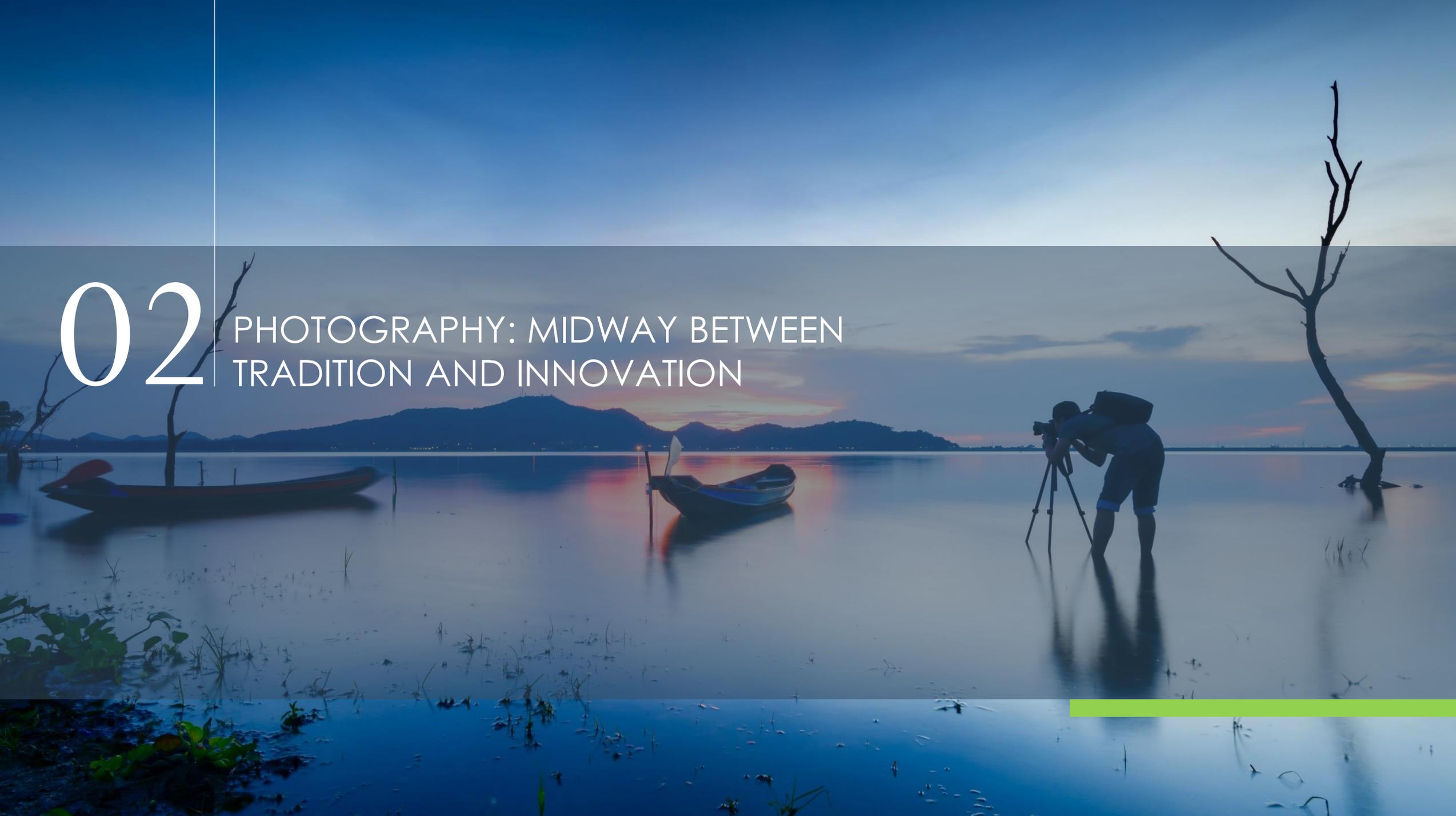


Showing/displaying my photos (print size, picture frames, etc.)

Handling / operating a new camera

Taking photos for specific purposes (e.g. for social networks, professional networks, etc.)

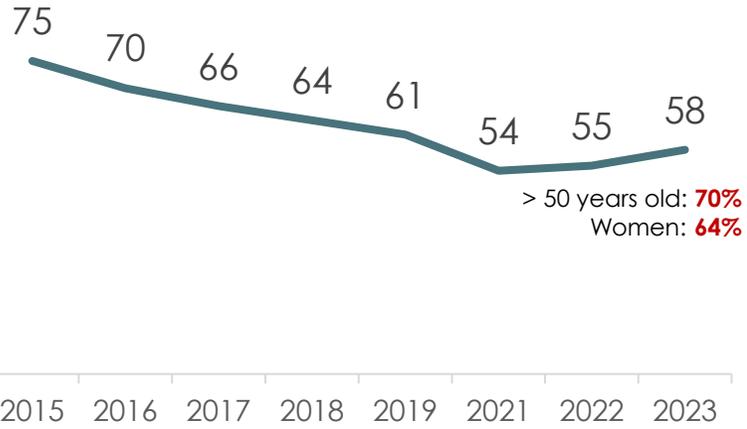




02 PHOTOGRAPHY: MIDWAY BETWEEN TRADITION AND INNOVATION

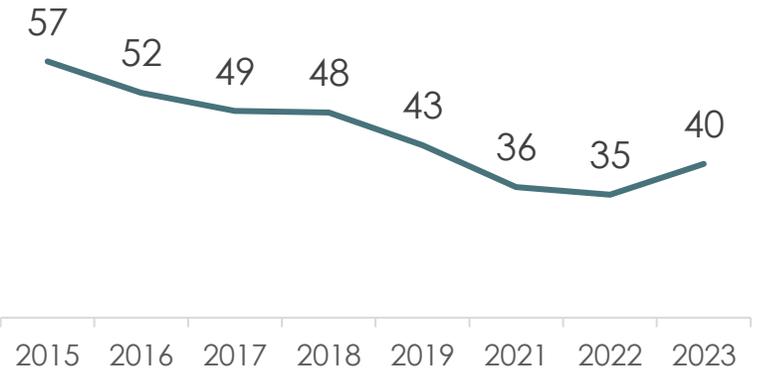
“Memento” snapshots display a downward trend over the long term

Taking photos enables you to...



HAVE KEEPSAKES

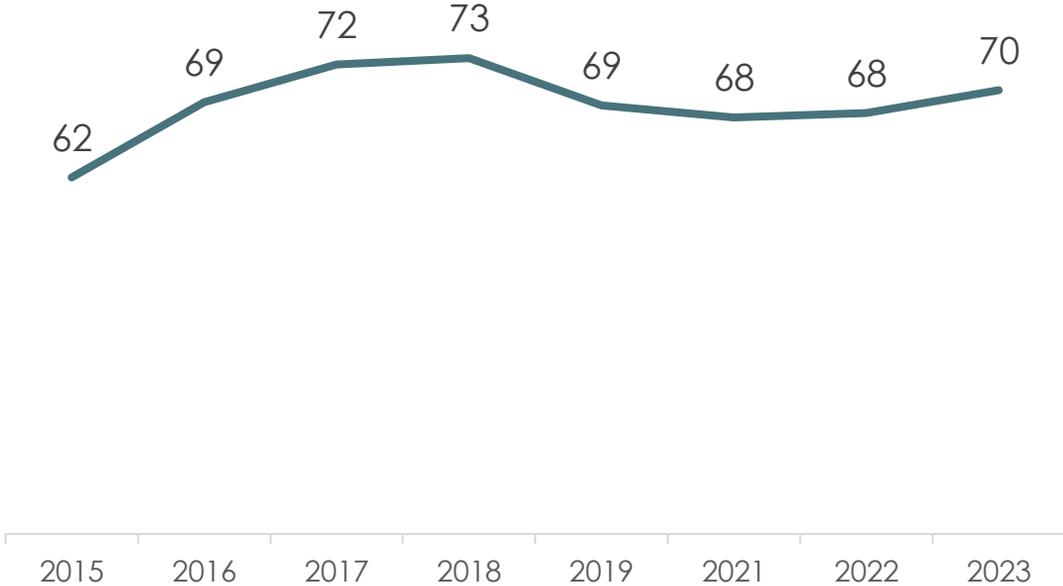
IMMORTALISE A BEAUTIFUL SCENE



Photography remains closely associated with artistic endeavours

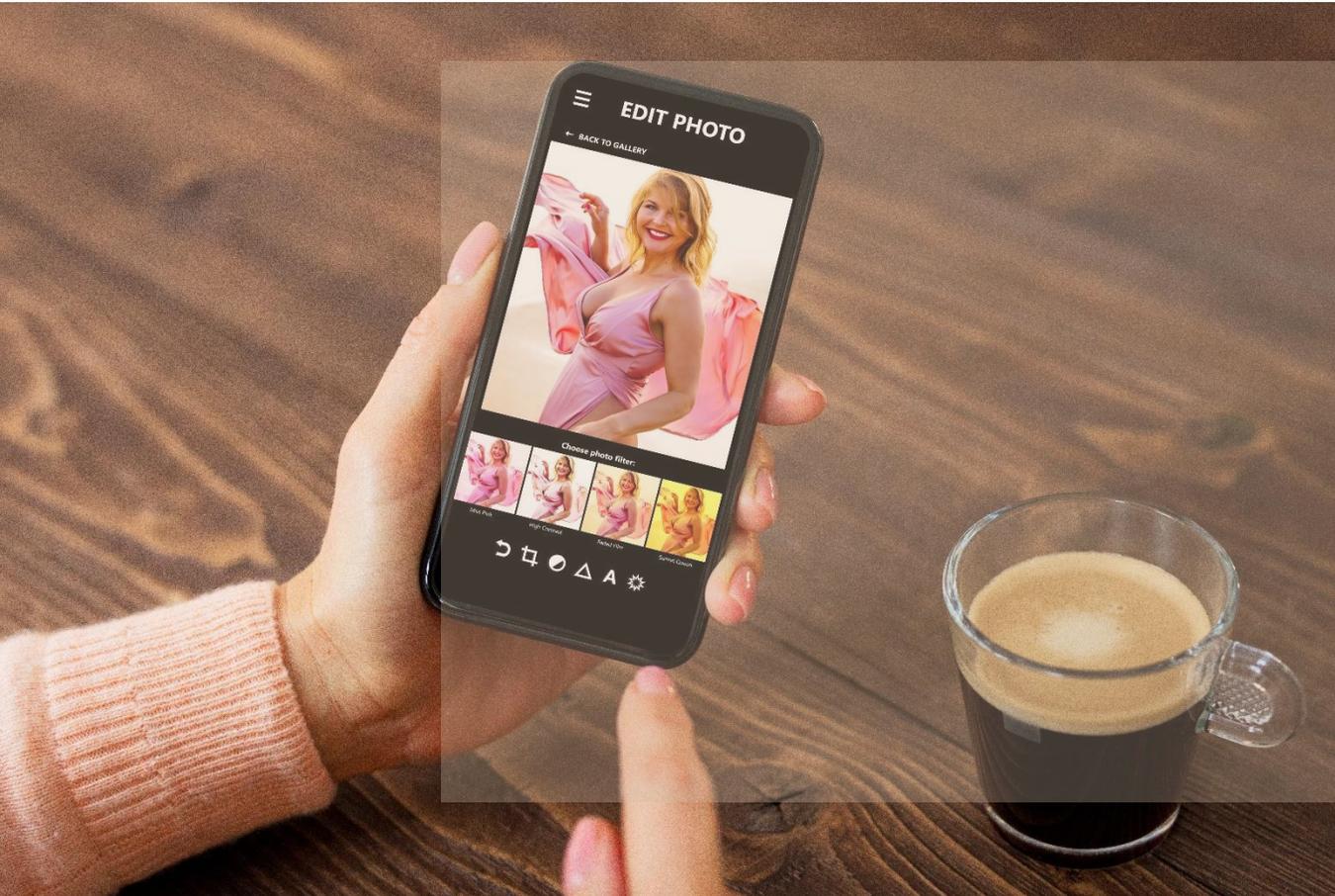
Today, photography enables us all to be artists

% Total agree



Base: Total take photos
1,000 people aged 15-65

Thanks to technological advances such as filters and effects, photos are becoming ever more enhanced



+7pts vs. 2015
Stable vs. 2022

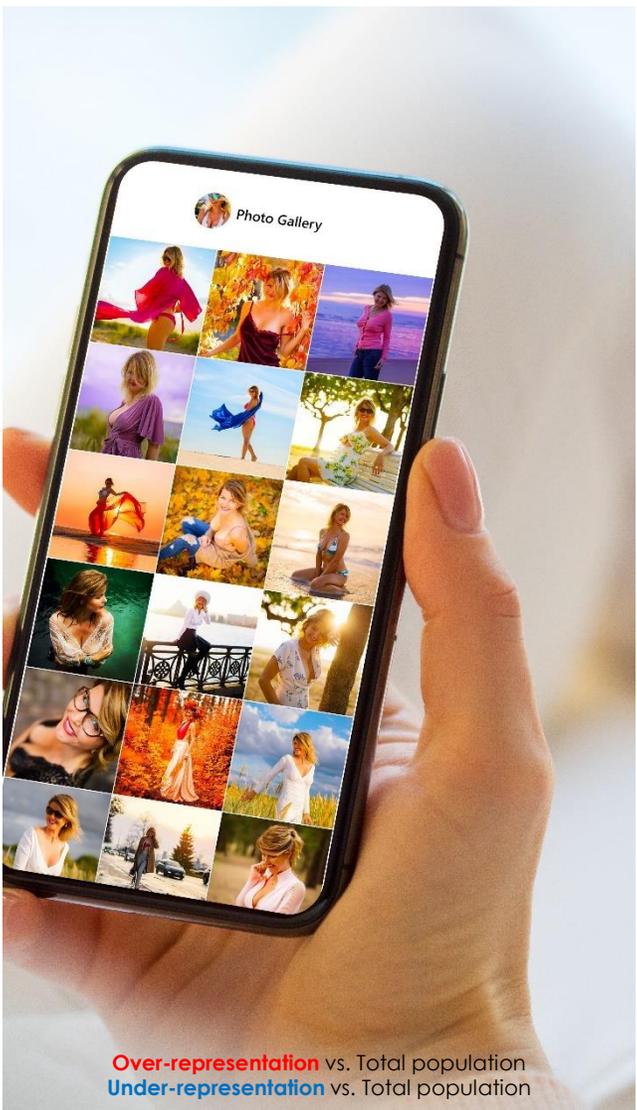
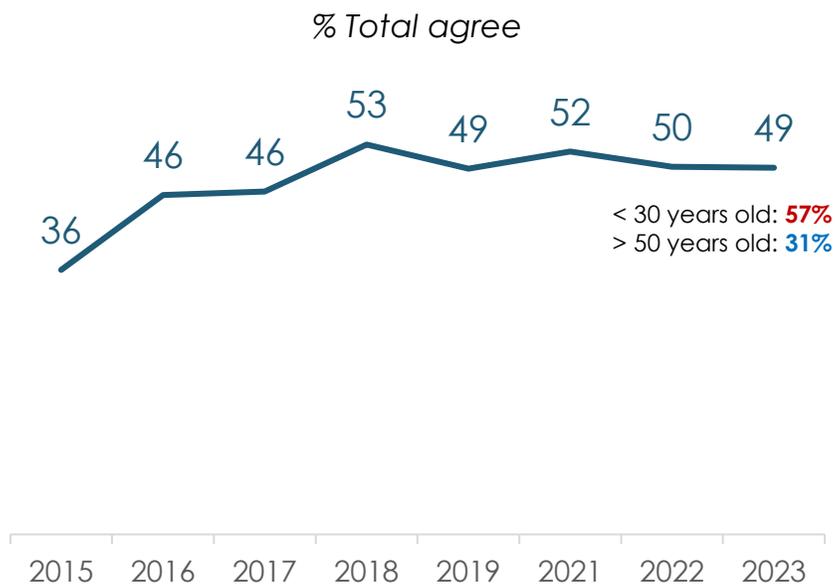
53%

< 20 years old: **72%**
Executives: **67%**
< 30 years old: **66%**

use smartphone applications that enable to create effects or modify their photos

For the younger generations, sharing one's photos is a means of maintaining a connection with friends

I share my photos to remain connected and not get cut off from others

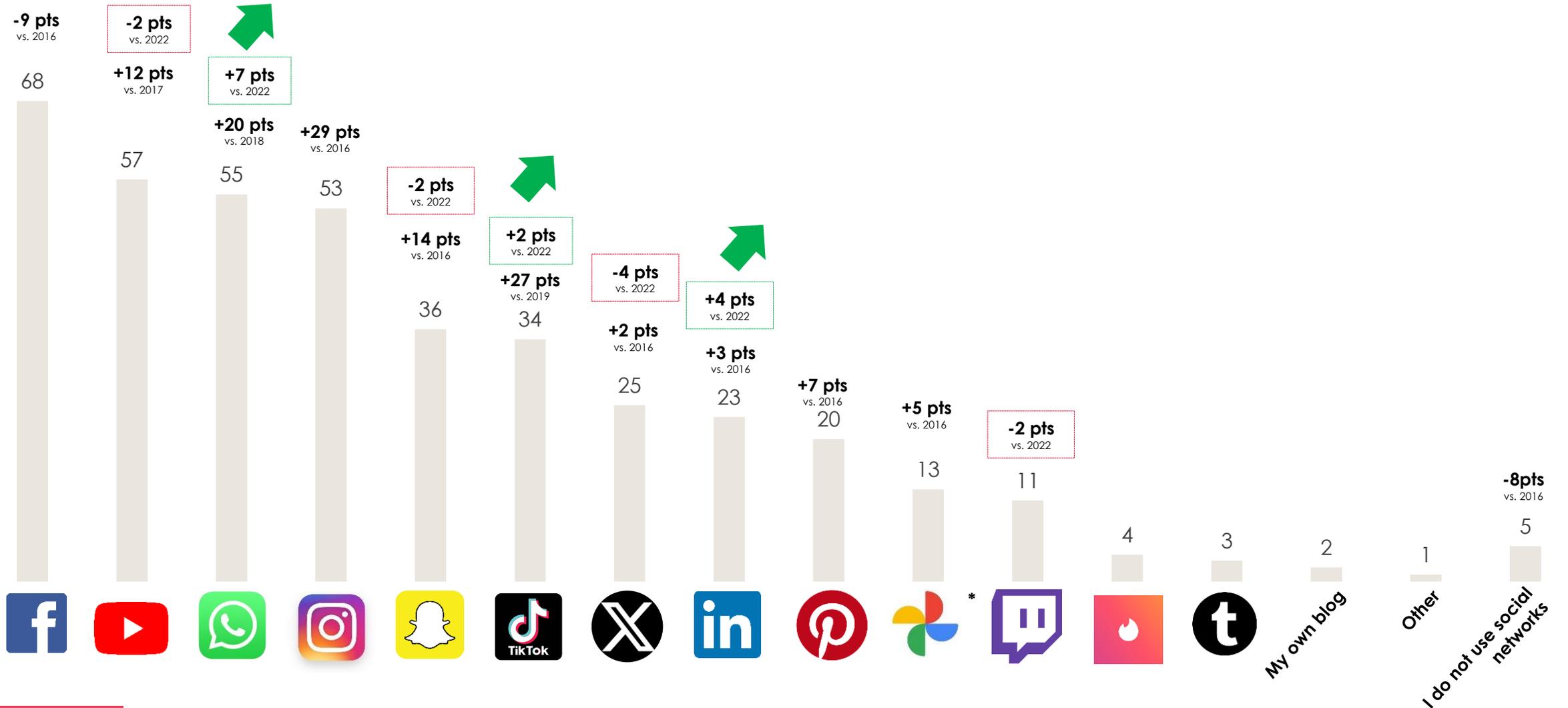


Base: Total take photos
1,000 people aged 15-65

Over-representation vs. Total population
Under-representation vs. Total population

You Tube, TikTok and LinkedIn continue to gain momentum

Which SOCIAL NETWORKS do you use?

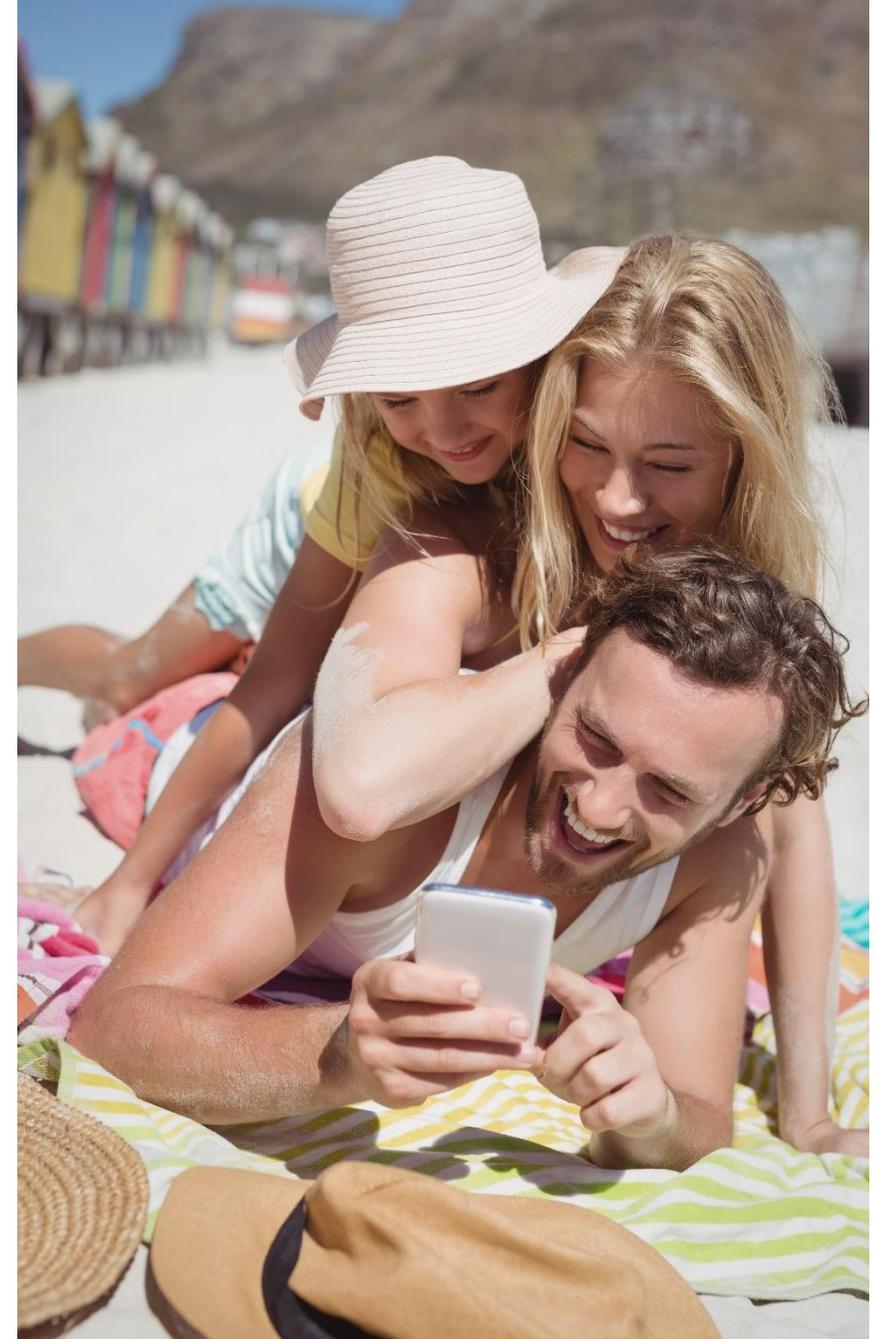
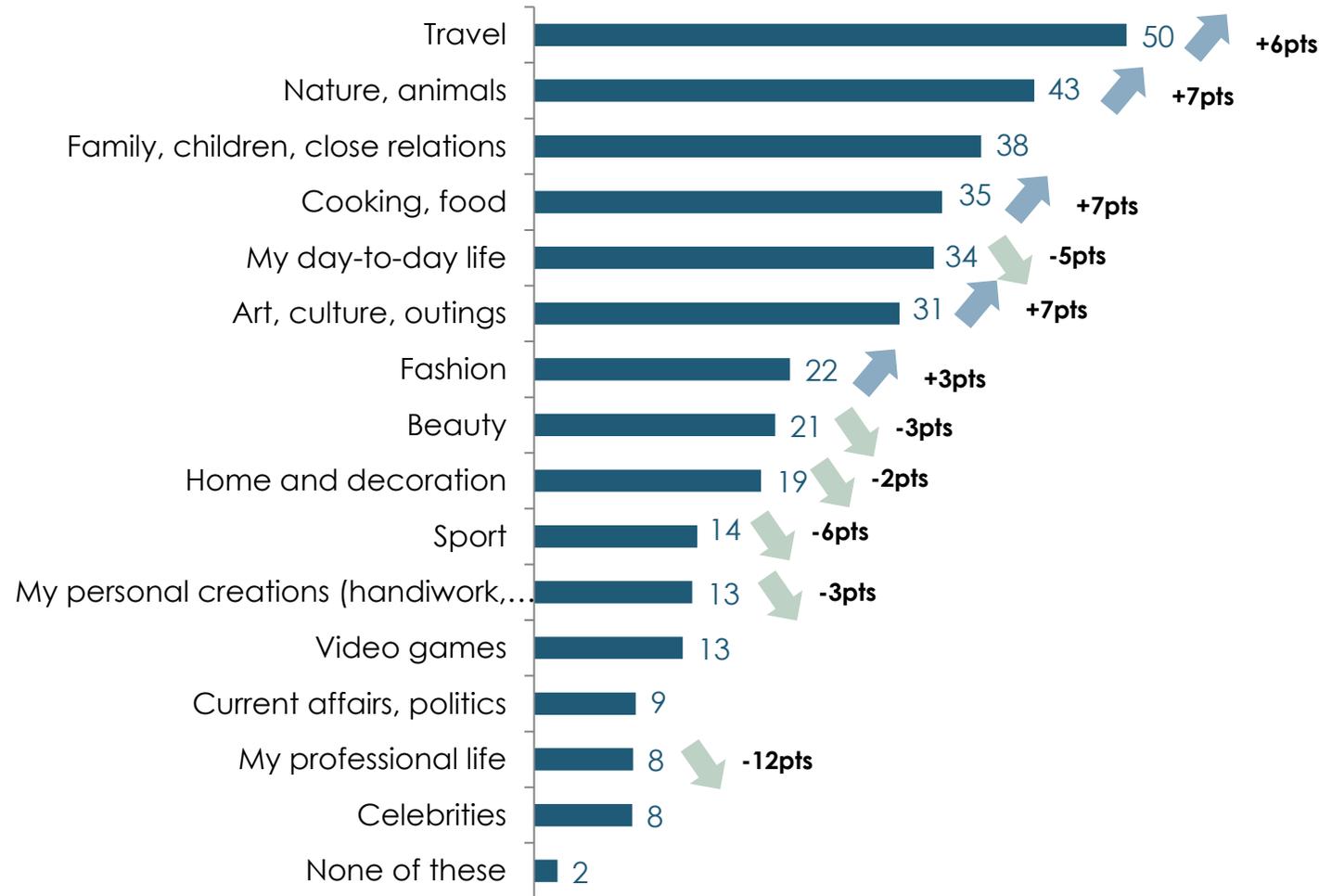


Base: Total take photos
1,000 people aged 15-65

Online sharing → 5 themes display an upward trend in 2023: travel, nature, food, art and fashion

What are the themes that correspond to the photos / videos you share online?

Evolutions vs. 2022



Over a third of people who take photos are of the opinion that AI generated photography should be considered as photography in its own right

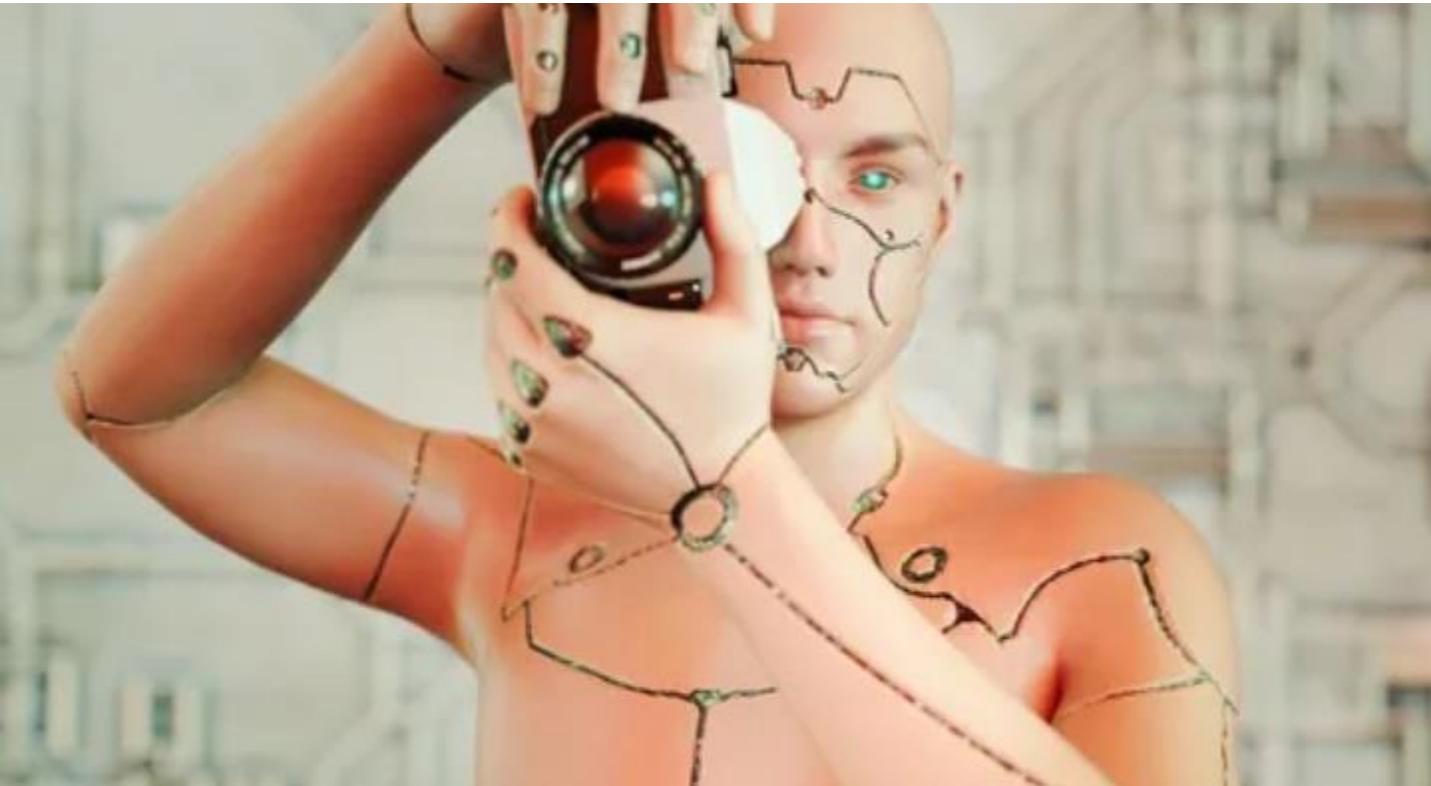
According to me, photos generated by artificial intelligence are real photos*
% Total agree

38%

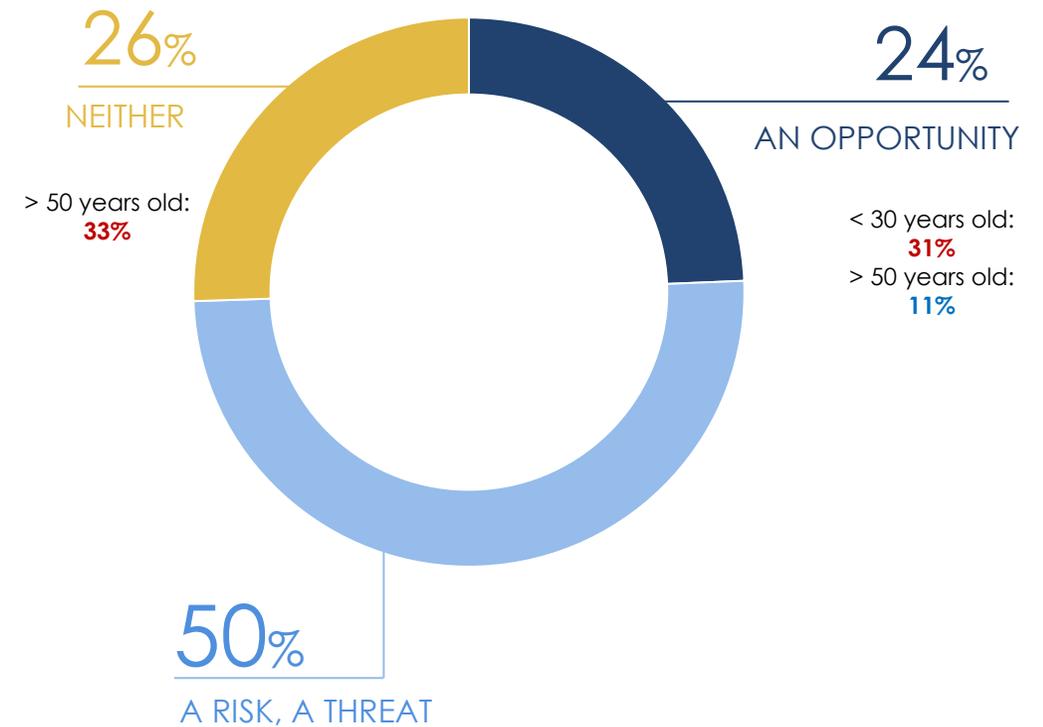
***New question 2023**

Base: Total take photos
1,000 people aged 15-65

No consensus as yet regarding the role of AI in photography



The fact that artificial intelligence can create photos is*:



*New question 2023

Base: Total take photos
1,000 people aged 15-65

Over-representation vs. Total population
Under-representation vs. Total population

However, one quarter of people who take photos expect artificial intelligence to play a major role in photographic creation in the future



Base: Total take photos
1,000 people aged 15-65

*New questions 2023

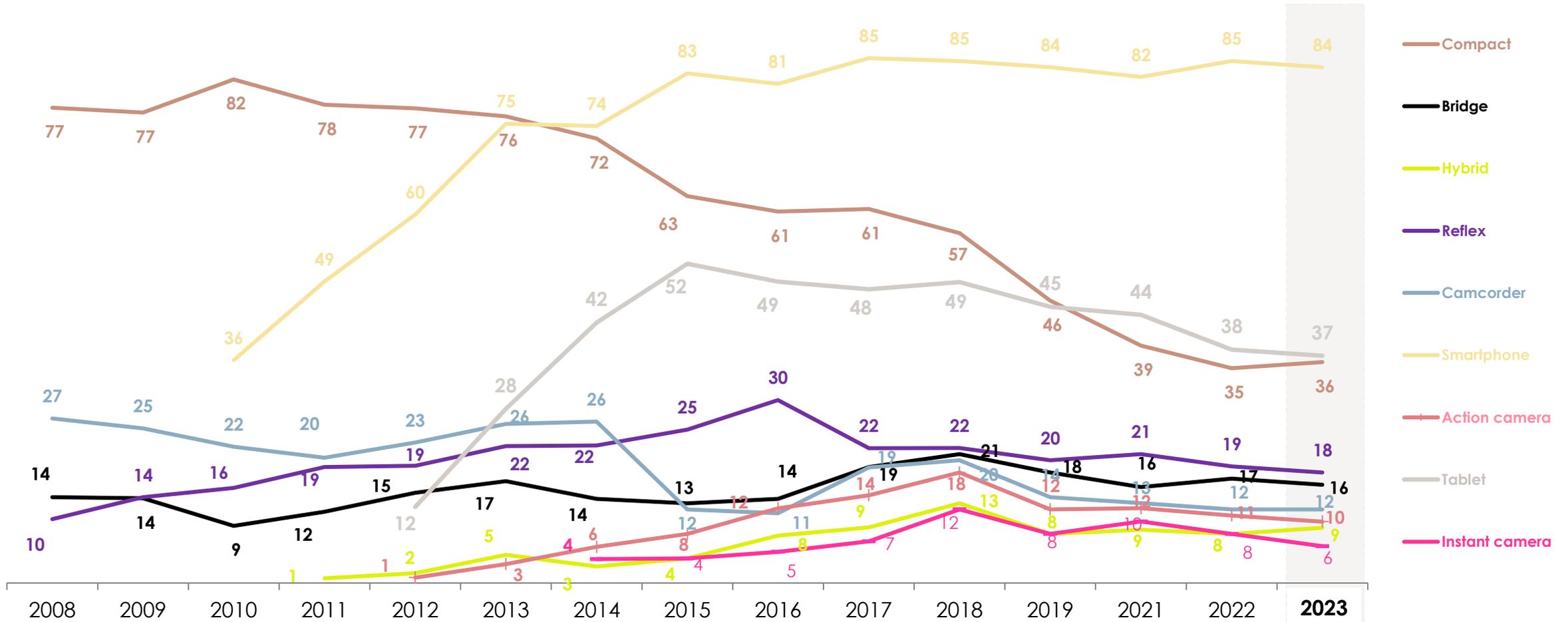
03

A DROP IN OWNERSHIP RATES DUE TO THE CRISIS
BUT PURCHASE INTENTION REMAINS UNAFFECTED



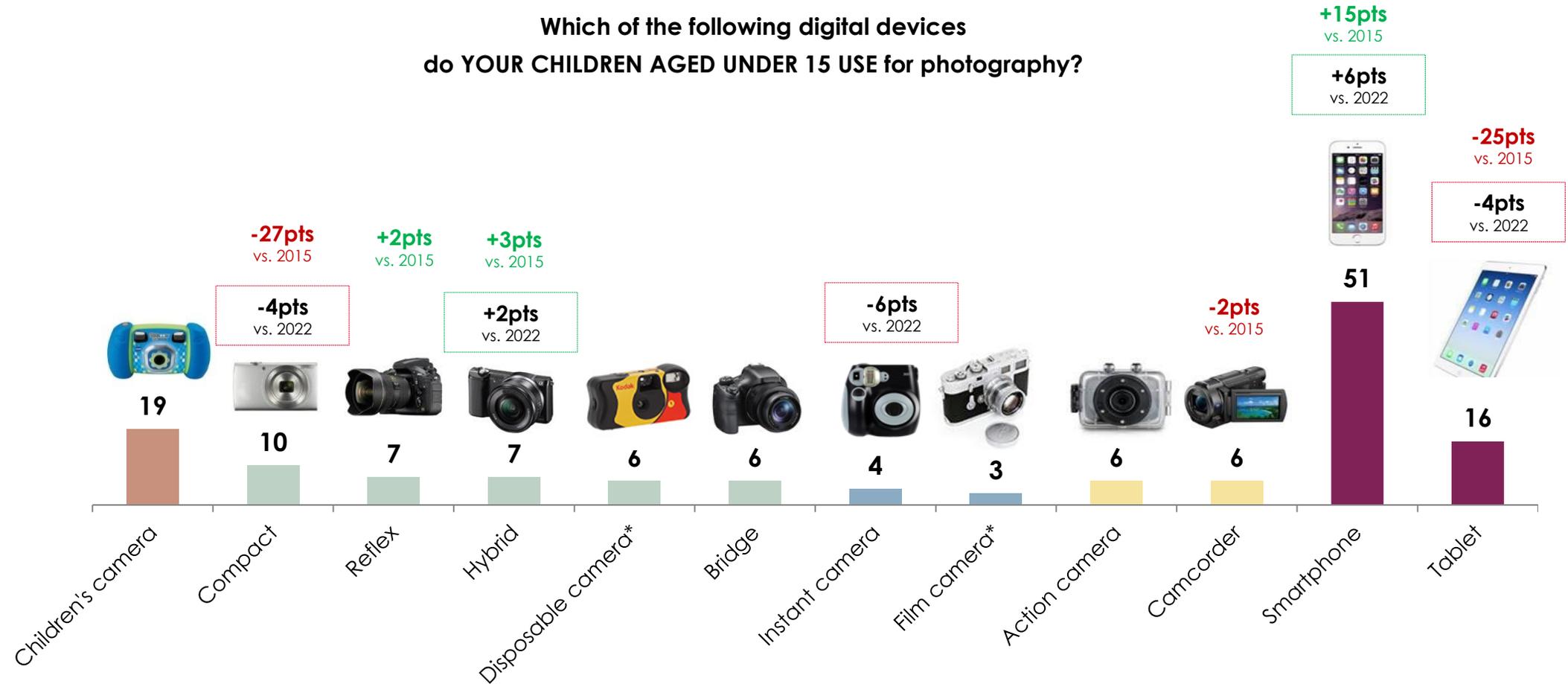
After going through a period of intense fluctuation, the photography equipment ownership rate has stagnated since the beginning of the 2020's

Which of the following digital devices do YOU OWN personally?



Base: Total take photos
1,000 people aged 15-65

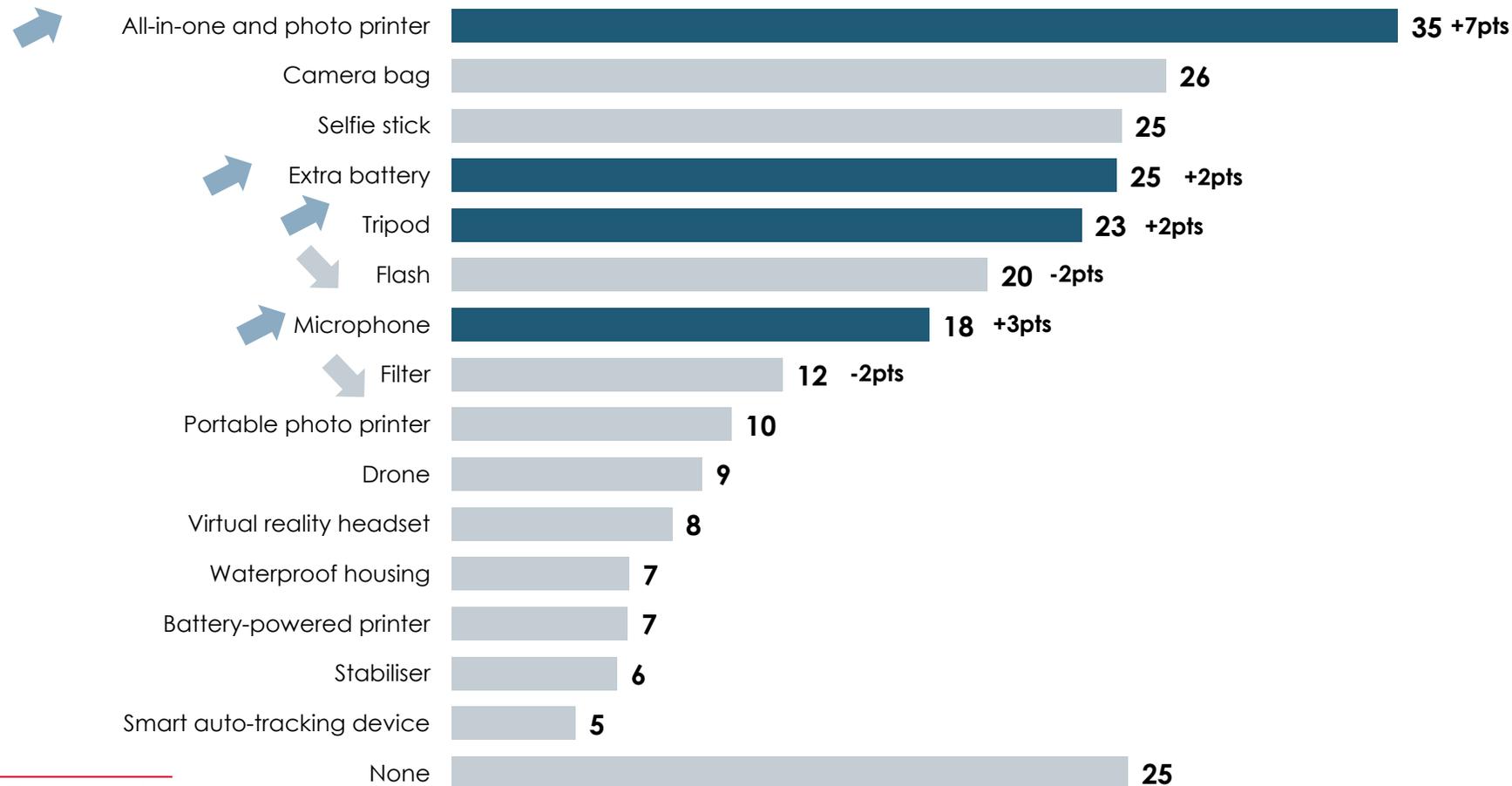
Smartphone usage has risen substantially among children and young adolescents
Hybrid cameras are increasingly used by the younger generations



Accessories: ownership of printers, extra batteries, tripods and microphones is up in 2023

Which of the following accessories and devices do YOU OWN personally?

Evolution vs. 2022



And over half would like to buy one,
 → greater interest in bridge and compact cameras in 2023

Which of the following photography equipment do you
 INTEND TO PURCHASE IN THE NEXT 6 MONTHS?

AT LEAST ONE DEVICE	54% (+7pts vs. 2015)	vs. 2022	vs. 2015
SMARTPHONE	19%	+2pts	+4pts
REFLEX	12%	=	=
BRIDGE	11%	+3pts	+8pts
COMPACT	11%	+2pts	+5pts
HYBRID	11%	=	+7pts
TABLET	7%	=	=
INSTANT CAMERA	7%	-2pts	+4pts
ACTION CAMERA SUCH AS GOPRO	6%	=	=
CAMCORDER	5%	=	+2pts
CHILDREN'S CAMERA	3%	=	+2pts
FILM CAMERA	2%	=	=
DISPOSABLE CAMERA	2%	=	=
CAMERA FILM(S)*	2%	-	-



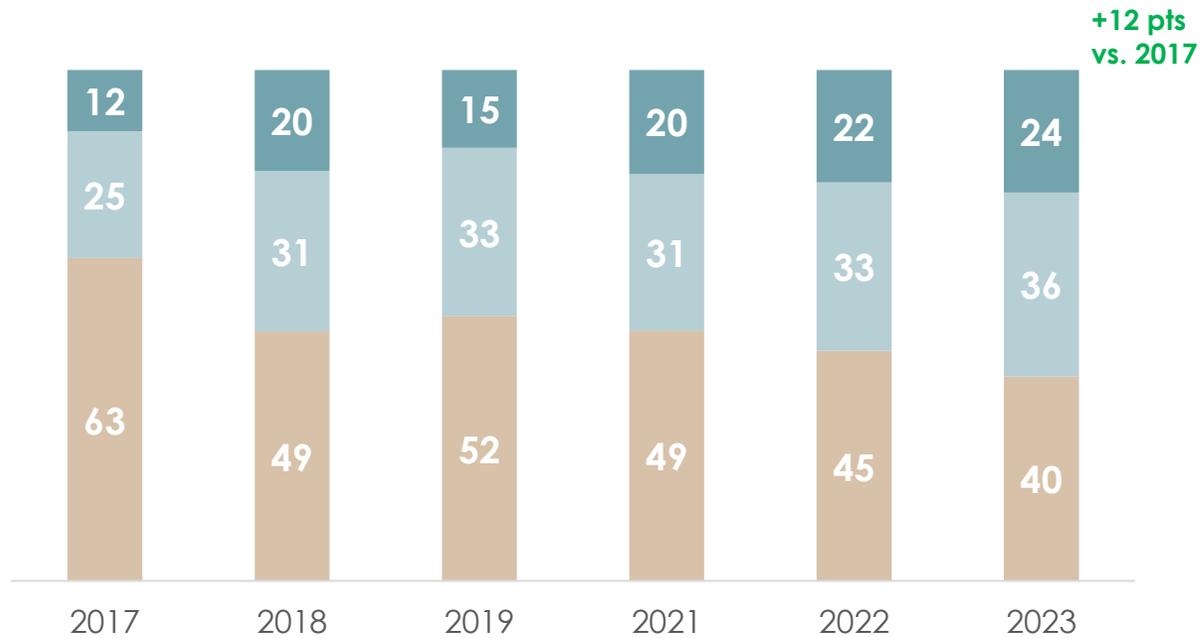
Base: Total take photos
 1,000 people aged 15-65

*Item added in 2023

The second-hand photography equipment market is expanding

Have you ever purchased
SECOND-HAND PHOTOGRAPHY EQUIPMENT?

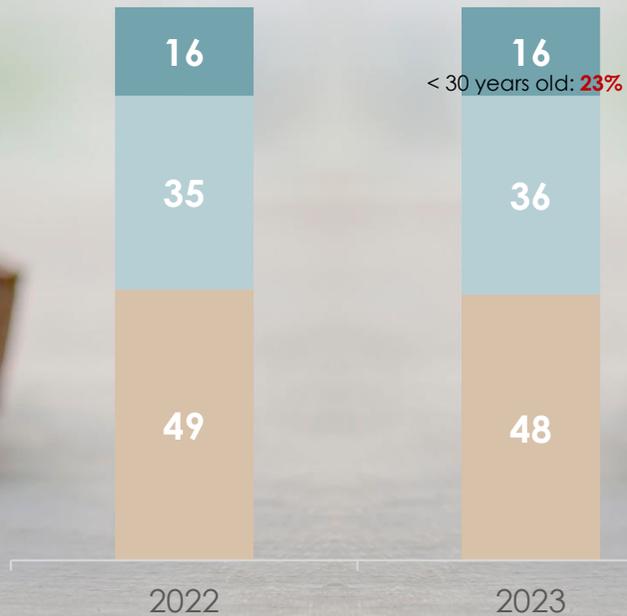
■ Yes ■ No but I have considered it ■ No and I have never considered it



The refurbished equipment market remains stable but proves enticing to over one third of people who take photos, in particular the younger generations

Have you ever purchased REFURBISHED PHOTOGRAPHY EQUIPMENT?

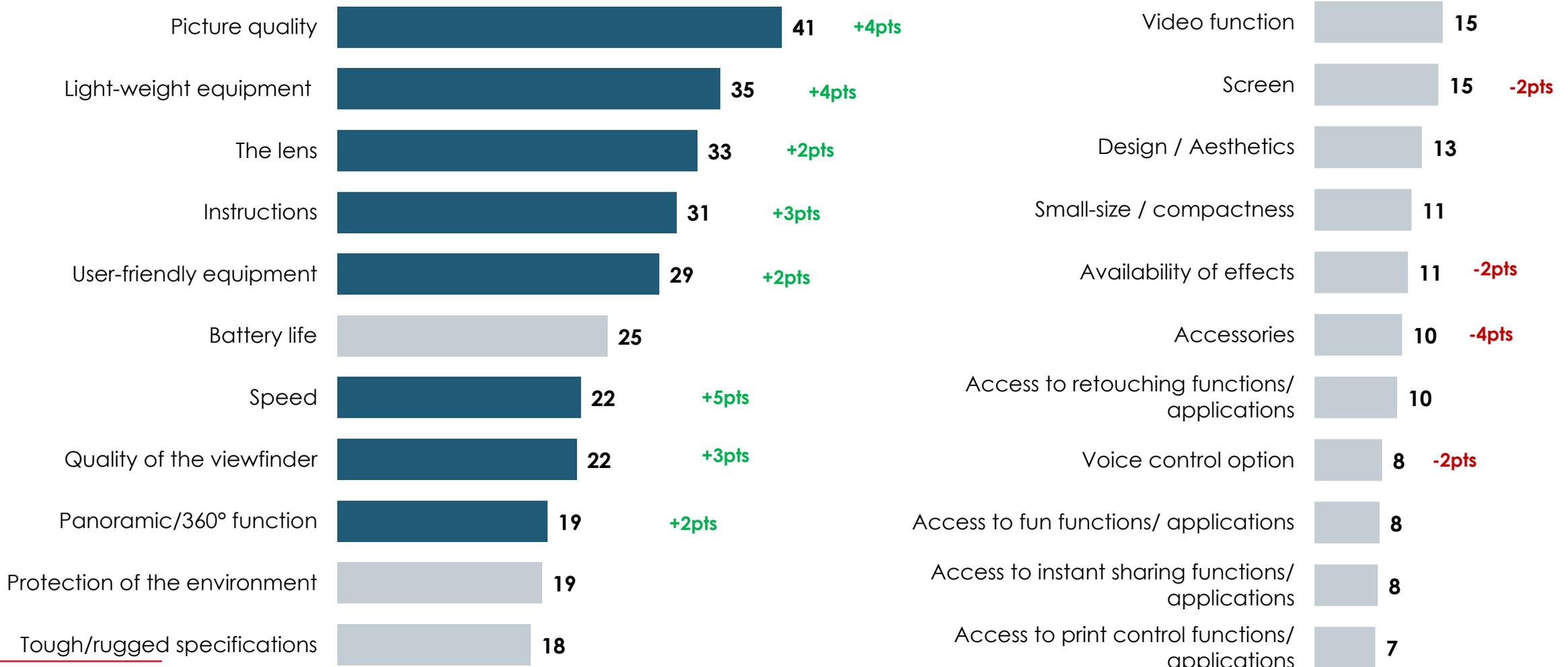
- Yes
- No but I have considered it
- No and I have never considered it



In 2023, many expectations with regard to manufacturers are on the rise: picture quality and light-weight equipment ranking first

With regard to cameras, according to you, what should BRANDS/MANUFACTURERS IMPROVE IN PRIORITY?

Evolution vs. 2022

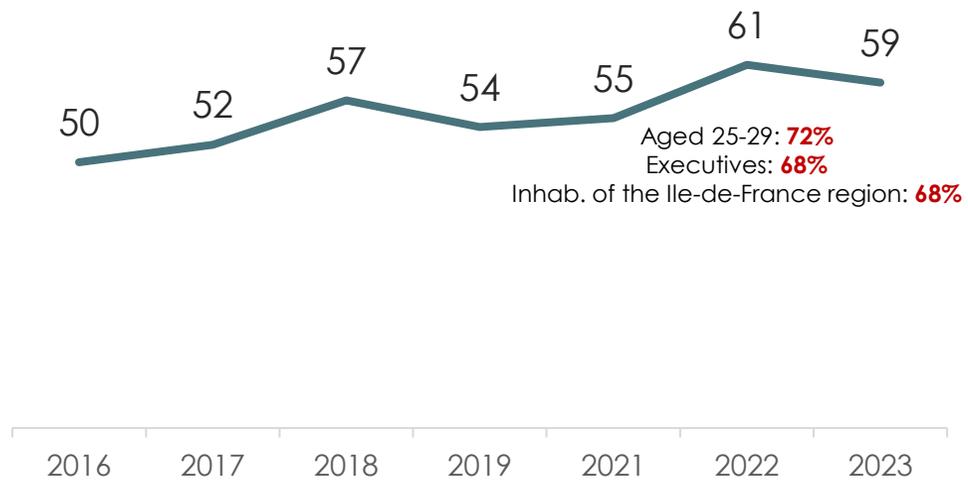


Base: Total take photos
1,000 people aged 15-65

“Vintage” designs remain fashionable, in particular among young adults

I love cameras with an old-school / vintage design

% Total agree



Base: Total take photos
1,000 people aged 15-65

Over-representation vs. Total population
Under-representation vs. Total population



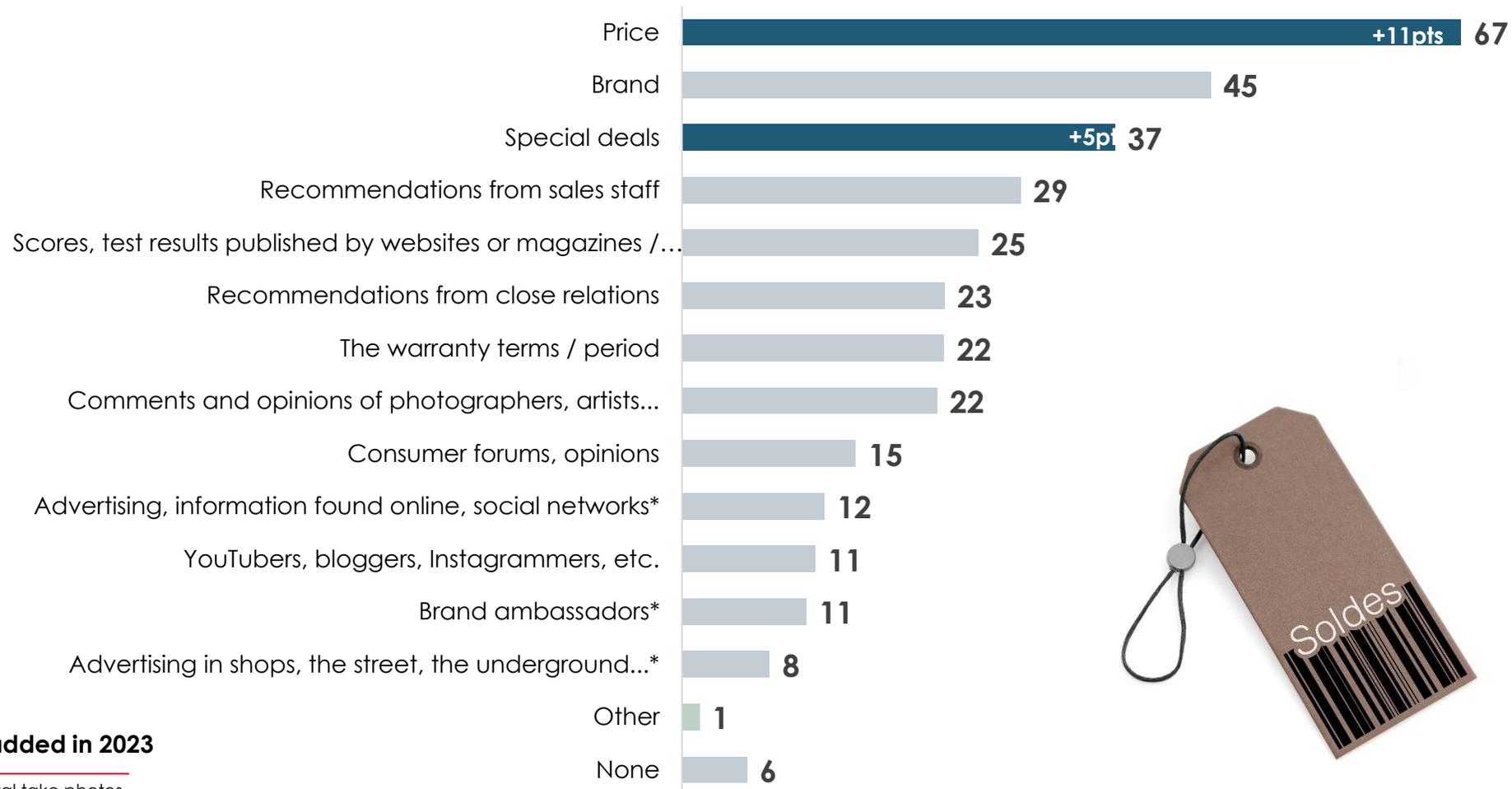
A man and a woman are standing in a retail store, possibly a clothing boutique. The man, on the left, is wearing a light blue button-down shirt and is looking towards the woman. The woman, on the right, is wearing a light blue t-shirt and has her hand raised as if gesturing during a conversation. The background is filled with shelves of clothing items, including shirts and blouses. A semi-transparent blue horizontal bar is overlaid across the middle of the image, containing the text. A thin vertical line is on the left side of the image, and a thin green horizontal bar is at the bottom right.

04

CUSTOMER JOURNEY: PRICE AT THE FOREFRONT,
ONLINE PURCHASES ON THE RISE

The importance granted to price and special deals reaches unprecedented levels

When considering photography equipment, what INFLUENCES YOUR CHOICE MOST?
Evolution vs. 2022



***Items added in 2023**

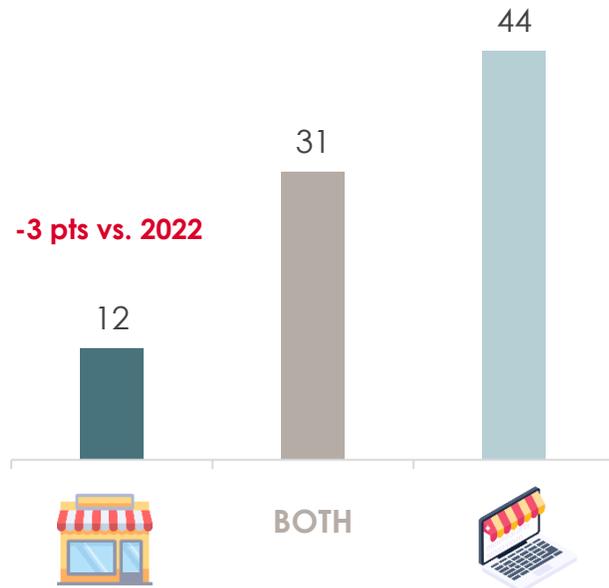
Base: Total take photos
1,000 people aged 15-65



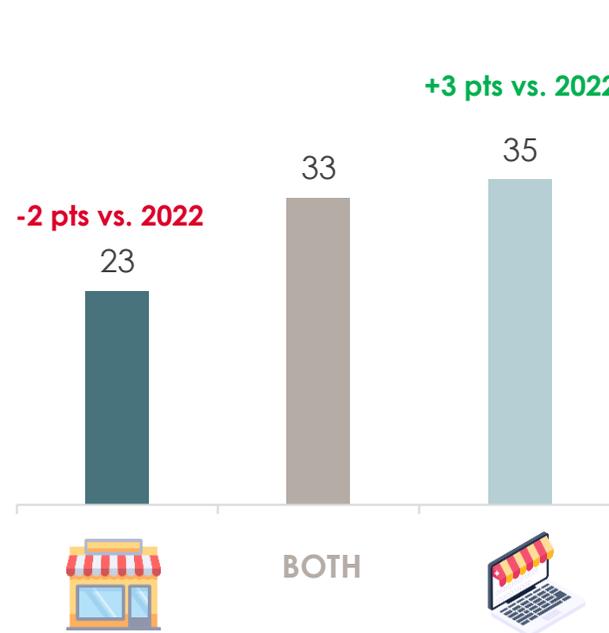
Potential buyers resort less to physical points of sale prior to purchase

Here is a list of courses of action linked to photography or video equipment. Do you prefer to do each of these in a STORE 🏪 or ONLINE 📱?

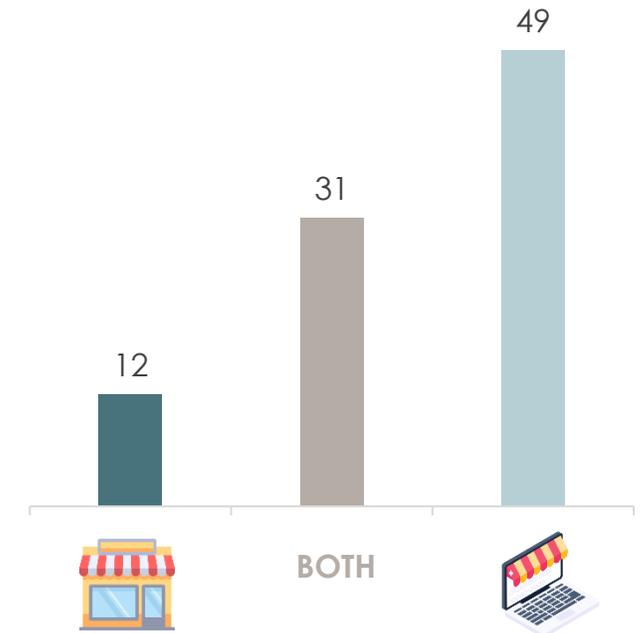
FINDING INSPIRATION, IDEAS



OBTAINING INFORMATION AND RECOMMENDATIONS



COMPARING PRICES

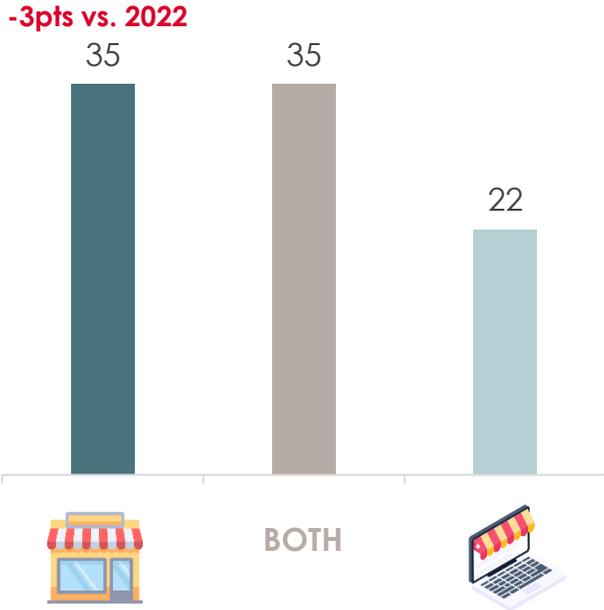


Even when it comes to the final purchase, shops are losing points

Here is a list of courses of action linked to photography or video equipment.

Do you prefer to do each of these in a STORE 🏪 or ONLINE 📱 ?

PURCHASING



After-sales service is also increasingly online



It is important for me to be able to **contact photography equipment brands** (cameras, accessories, printers...) **on social networks to access their after-sales service, advice...**

% Total agree

55%

Executives: **66%**
Aged 30-49: **62%**

+3pts vs. 2022

Base: Total take photos
1,000 people aged 15-65

Over-representation vs. Total population
Under-representation vs. Total population

On the other hand, when the aim is to find out what is new on the market, physical events are preferred by far to online events

When you wish to discover new photography or videography products and equipment, do you prefer to attend...

Stable vs. 2022

VIRTUAL, ONLINE EVENTS

35%

< 30 years old: 46%
> 50 years old: 22%



PHYSICAL EVENTS

65%

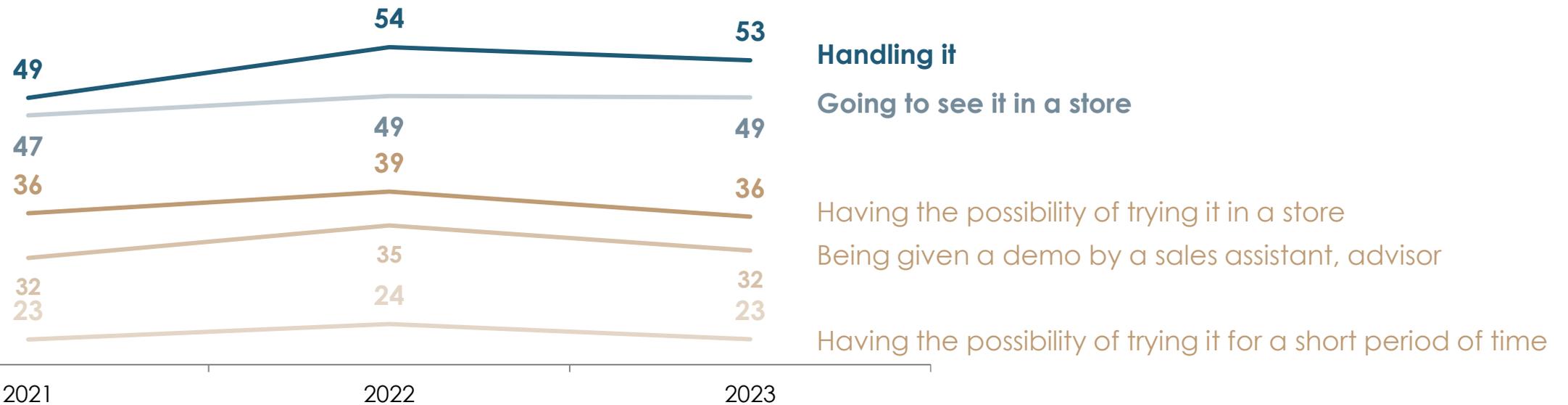
< 30 years old: 54%
> 50 years old: 78%



“Touch & try” remains important for over half of those who take photos

When you are considering the purchase of a new camera, to what extent are the following courses of action **IMPORTANT BEFORE YOU MAKE UP YOUR MIND?**

% CRUCIAL



Base: Total who take photos
1,000 resp. aged 15-65

05

PRINTING PHOTOS MAINTAINS ITS APPEAL



Full-on virtual is wavering

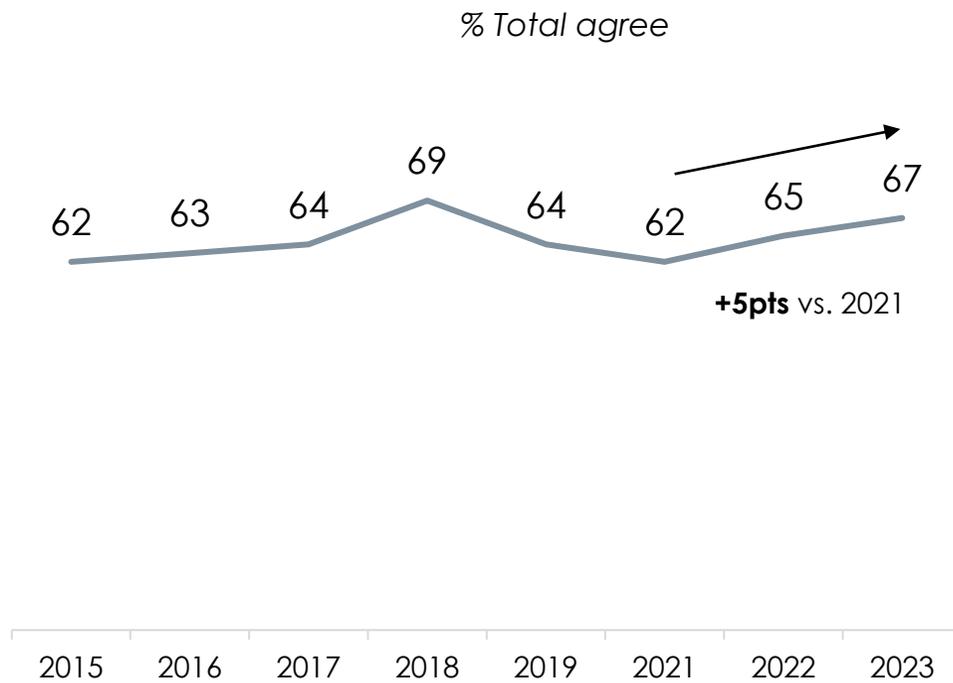
We will no longer print any of our photos in the future, everything will be virtual

% DESIRABLE



Meanwhile, printed photos are making a comeback

Nothing can replace a printed photo



An increasing number of individuals are showcasing their photos and creating albums

We sometimes WANT to do things we do not always get around to doing. Have you considered doing each of the following DURING RECENT MONTHS, and have you seen these ideas through?

Display at home photos I have taken

I wanted to and have done this	23% +3pts vs. 2022
I wanted to but have not done this	21% -2pts vs. 2022
It has never crossed my mind but I would be interested	22% +2pts vs. 2022
It has never crossed my mind and I am not interested	34% -4pts vs. 2022

66% < 30 years old: 79%
are interested
+4pts vs. 2022

I love creating and putting together photo albums

% Total agree

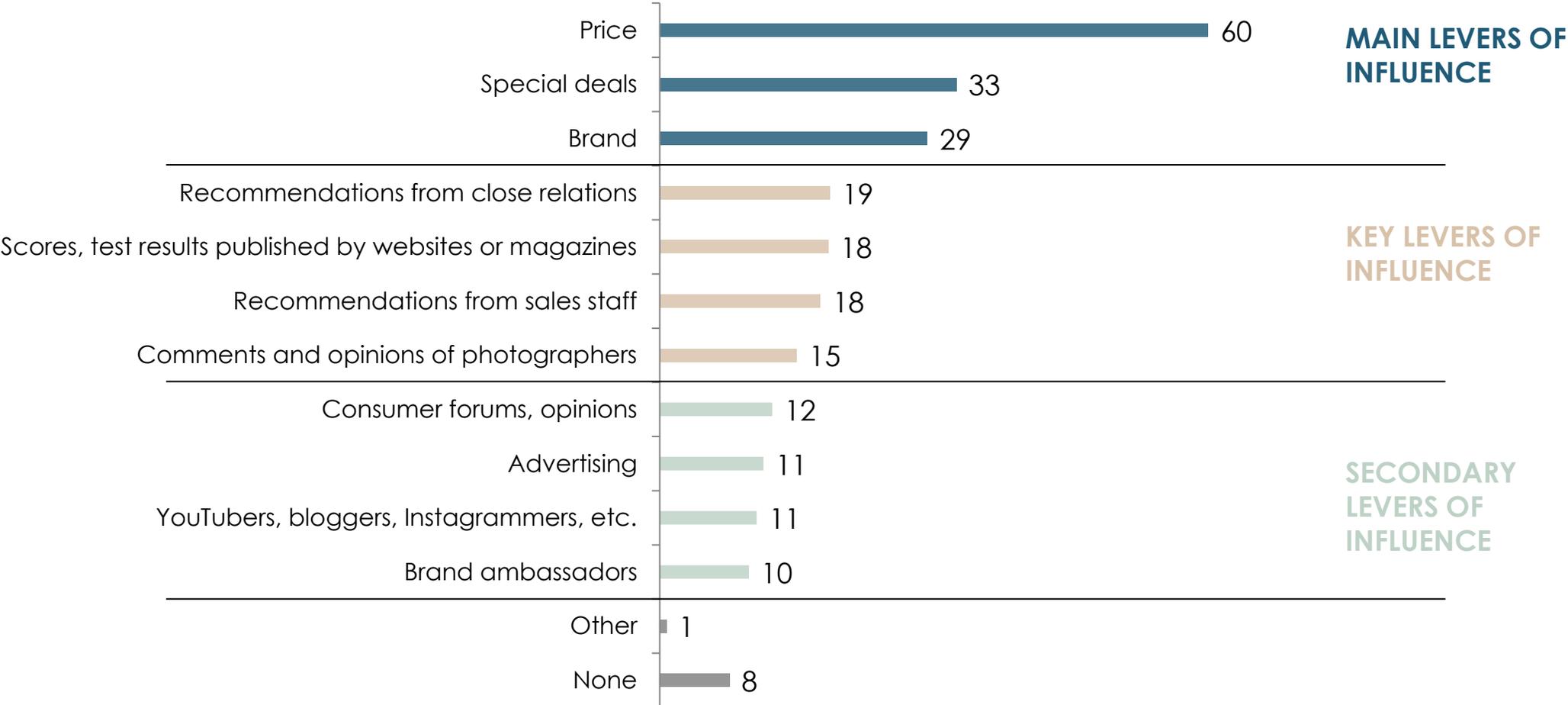
67% < 30 years old: 73%

+2pts vs. 2022
+8pts vs. 2015



Price is unsurprisingly the criterion considered most closely when printing photos

When it comes to printing photos, what influences your choice most?*



*New question 2023

Base: print photos
899 resp. aged 15-65



CONCLUSIONS

2023: PHOTOGRAPHY IS REUNITED WITH ITS CORE FUNCTIONS

- The “**keepsake/memento**” **function of photography** is back on centre-stage after experiencing a decline.
- And subsequently, **tangible photos** are back in favour too. Indeed, printing one’s photos reflects the need expressed by photography enthusiasts to keep tangible memories. **Photo albums, photos for home decoration and scrapbooking** remain dynamic trends.
- The appeal of printing has never ceased to rise over the years while a future in which **virtual images prevail is viewed with more wariness in 2023**. Meanwhile, **retouched photos continue to win over new audiences**: filters and effects enable to play around with one's photos and contribute to rendering photography a means of personal expression.
- With the development of social networks, photos are more than ever a **way of fostering ties and staying connected with others, in particular among the younger generations**.



PHOTOGRAPHY ENTHUSIASTS ARE OPENING UP TO THE POSSIBILITIES PROVIDED BY ARTIFICIAL INTELLIGENCE AND VIDEO

- **The development of artificial intelligence is also impacting photography.** Even though opinions are still divided on this topic, one quarter of those who take photos - and in particular men living in an urban environment - adopt a **positive standpoint to the integration of AI in photography.**
- Furthermore, not only is **video becoming increasingly advanced and sophisticated**, but it is also increasingly **ubiquitous**. Producing high-quality videos has never been easier thanks to a growing range of **accessories** as well as social networks which provide users with numerous enhancement options. Users are increasingly keen on **editing tips** and advice to help them choose a camera that will enable them shoot video footage.

PURCHASE INTENTION REMAINS STEADY DESPITE INFLATION

- In spite of the difficult economic situation and stagnant equipment ownership rates, **purchase intention levels are showing no signs of faltering** and there are just as many photography enthusiasts out there.
- **As a result of the crisis, this population is keeping a close eye on spending** and holding back from buying photography equipment. **Nonetheless, the appeal of cameras is far from waning.** On the long term, cameras, lenses and accessories display an upward trend.
- Smartphones are broadly resorted to for photography and confirm their status as the **go-to camera for the general public** whereas ownership of other types of cameras remains more restricted. This year, it can even be observed that the **use of smartphones by children for photographic purposes has leapt forward.**
- As a result of inflation, **alternative retail channels have come into their own. The second-hand market continues to grow**, and while refurbished equipment remains a niche market it interests over half of this population of consumers and is a particularly tempting option for the younger generations. **An increasing number of refurbished cameras are being purchased**, in particular compact, reflex and hybrid models.



PRICE AND THE NEED FOR GUIDANCE LIE AT THE VERY HEART OF THE CUSTOMER JOURNEY

- **Price** plays a key role this year. However, it is not the only purchase criterion to be gaining ground, a phenomenon which proves that photography enthusiasts require several solid pointers in order to make the right choice: **the brand, recommendations from sales assistants, other consumers' opinions and scores are also increasingly influential.**
- When considering ways in which to improve their equipment, manufacturers should focus their efforts above all on **picture quality, light-weight devices and handling, while ascertaining the best possible value for money.**
- Coming out of lock-down renewed the appeal of physical touchpoints in France. However, **the internet is gaining momentum again, in particular when it comes to finding ideas and comparing prices. Physical points of sale remain important touchpoints nonetheless,** as they enable potential buyers to see the products, handle them, obtain advice, etc.