Market segmentation for analog photography market and effective digital marketing communications. Case study: Kamerastore.

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Abstract

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In recent years, analog photography or film photography has seen a revival and increasing popularity among amateur and professional analog camera users worldwide. However, very little research was found on the market situation as well as the global analog community. Based on a previously conducted survey in 2017 by the case company, this research examines the current market segments to understand further their characteristics and identify possible implications for effective digital marketing communications for Kamerastore.

The research is comprised of both relevant theoretical frameworks on market segmentation and digital marketing communications as well as empirical research. In particular, the empirical study was conducted using an online questionnaire which was widely spread within the analog community globally. The survey gathered 3238 valid responses that were analyzed by SPSS Statistics software.

The results reveal some changes in the market segments between 2017 and 2020 in terms of their structure, distribution, market share, and age. In addition, the analysis gives more insights into different characteristics of market segments regarding their experience, product usage, and preferences, as well as influencing factors to their online buying decisions. Thus, certain market segments are considered attractive for the case company. Furthermore, Youtube and Instagram are found to be the two dominant online platforms for the film community. Thus, relevant digital marketing communications and content are identified to increase the outreach of Kamerastore while strengthening its trustworthiness and relevancy.

Keywords
Analog (Film) Photography, Market Segmentation, Digital Marketing Communications.

Abstract

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1. Introduction

According to the statistics published by Japanese organization CIPA (Camera & Imaging Products Association) from 1947 to 2014, digital photography was embraced by amateur and professional photographers alike since the early 2000s, which leads to the plummeting sales of global analog cameras until a negligible point in 2008 (Televisory 2017). While several long-established film camera manufacturers were closed or sold to other digital businesses, other major market players including Leica, Mamiya, Canon, Nikon, etc. eventually ceased their production of analog cameras and switched focus to products and solutions powered by digital technology. From that point, the market for analog photography remained as a niche, particularly for the marginalized demand for physical image object fulfilled by instant film photography brand such as Fujifilm, as well as retro aesthetics created by Lomography brand. However, the market outlook seems to change in the past five years. Digital camera market has been struggling with shrinking sales by 87% since 2010 due to the rise of smartphone equipped with improving higher-resolution cameras (Statista 2020), which recently caused the exit of Olympus from digital camera manufacturing (BBC News 2020). On the contrary, some parts of the world have witnessed increasing popularity for analog photography as well as a growing community on multiple platforms of both amateur and professional analog camera users who have adopted a wider range of film cameras. In a recent poll about the choice of the next camera type on the videophotography website Fstoppers (Fstoppers 2020), roughly 62% of the respondents voted for a film camera in either medium format, 35mm, or large format, whereas only 27.5% chose a digital one.

Due to the very limited availability and high price of brand-new film cameras still produced by Leica, consumers usually opt for existing used film cameras as plenty of them still function properly while costing only a fraction of the price of the new ones. Thus, the market for used film camera is blooming as demand for them rises. According to Research Reports World (2020), the global film camera market is anticipated to rise at a considerable rate at least in the next 6 years. However, there are very limited researches on the consumer behavior of analog photography market, leading to the lacking understanding of changing market situation and the ability to meet the demand of new consumers, particularly young generations.

The first chapter will guide readers through background knowledge on the topic, the purpose of the research, how it is structured, and the scope of the study. Afterward, the author will address the international aspects of the study, relevant key terminologies, and the benefits as well as potential risks of conducting the research. Finally, the chapter will conclude with a brief introduction of the case company.

1.1. Background

The case company Kamerastore specializes in selling refurbished or repaired used analog photography products to the local as well as the international markets through its Tampere-based store and an e-commerce site called Kamerastore. The business is facing competition with not only other international online stores and brick-and-mortar shops but also individual sellers on major e-commerce platforms such as eBay and similar local online classifieds.

Due to easy access to the internet and advanced technological tools, online shoppers are enabled to bid on different product offerings globally at any time, compare several products, read reviews from other consumers and engage in social networking with communities of shared interests to find the best products without the help of middlemen. As online consumers are becoming more sophisticated and cultivated, making it harder for businesses to captivate, satisfy and maintain, it is more important than ever for businesses to add values to product offerings and have them customized to meet the needs of each consumer segment. (Leon & Joseph 2015, 36).

In terms of analog photography market and its consumers, very limited hard data and reliable research are available or accessible. Some studies only focused on the darkroom practices (Ilford 2019; Ilford 2020), others were outdated while a few were limited to the study of Lomography's consumers and business (Lomography 2013; University Institute of Lisbon 2012). Only one recent survey was found to study the whole analog community by the case company in 2017, however, the survey has its limitation in terms of the consumer behavior and marketing implications for analog photography market.

In addition, it was found that studies of online consumer behavior often lacked the consideration for different market segments which resulted in ineffective marketing implication. As consumers tend to have different behaviors due to their distinct needs, values, and characteristics, market segmentation enables companies to effectively target a group of consumers that it can serve best. (Huseynov & Özkan Yıldırım 2019.) The 2017 survey established five major segments in the analog photography market based on the different pre-determined characteristics of analog camera users. However, it did not perform any analysis of consumer behavior in different segments. Thus, the author decided to explore this angle in the research in order to understand the current market segments and identify relevant implications for effective digital marketing communications for the company. Besides, as an analog photography enthusiast, the author is driven to conduct this research in an endeavor to preserve this beautiful art form while accumulating deeper knowledge on the topic, particularly from a marketing perspective.

1.2. Research Objectives and Questions

The objectives of the research study are to provide an update on the analog photography scene and changes in the market segments since 2017, and simultaneously identifying possible differences in their characteristics such as usage and online shopping behavior. As a result, this would form a more comprehensive understanding of new consumers. Moreover, the thesis aims to find appropriate digital marketing communications elements to efficiently reach potential consumers and whether they vary among these market segments.

Research Question: “How to distinguish and attract the consumers of potential market segments with appropriate digital marketing communications?”

The author used a systematic approach to investigate the research question in detail by dividing it into five investigative questions (IQ) as follows:

IQ1: How have the market segments changed since 2017?

IQ2: What are the characteristics of each market segment?

IQ3: Which market segments are attractive for Kamerastore?

IQ4: What are the effective digital marketing communications for the approach of potential market segments?

The following table describes the interrelations between theoretical framework, research methods, results with each investigative question.

Table 1. Overlay matrix.

Investigative Question	Theoretical Framework	Research Methods	Survey questions	Results
IQ1	Chapter 2, 2.1, 2.4 - Market segmentation and segmentation variables	Desktop studies, consumer survey	3, 5, 11, 32, 33, 34	Chapter 5.2
IQ2	Chapter 2.2 - Segmentation profiling & personas	Consumer survey	1, 2, 6, 7, 8, 13, 18, 24, 25, 26, 27	Chapter 5.3
IQ3	Chapter 2.3 -Criteria for market segments	Consumer survey	12, 14, 28, 29, 30	Chapter 5.4

IQ4	Chapter 3 - Effective digital marketing communications	Consumer survey	10, 17, 15, 16, 25	Chapter 5.5

1.3. Demarkation

It is important to note that the subject of the thesis is purely analog photography market, hence digital photography market will not be addressed in the research study. In particular, the research analysis mostly focuses on the used analog camera gear market as it is the main market in which Kamerastore operates, however, new film camera market, including instant film and Lomography camera, is also taken into account to observe the product preferences of consumers globally. The research puts primary focus on the understanding of market segmentation, its characteristics, and influencing factors on consumer buying decisions as well as implications for digital marketing communications. The thesis also emphasizes the e-commerce business model adopted by the case company, hence, digital marketing strategy is the main topic of the research. Traditional and offline marketing practices as well as digital marketing channels which are deemed inappropriate by the author, will not be covered in this thesis.

1.4. International Aspect

The thesis aims at delivering Kamerastore deeper insights into consumer perspectives in different market segments to improve their current digital marketing communications to approach and engage more effectively with customers internationally. The study will provide Kamerastore a comprehensive understanding of the different market segments in analog photography market and their characteristics, preferences as well as factors influencing their decision.

The thesis outcomes will also be utilized in generating useful information for the whole analog community. Furthermore, the author will expand her knowledge on the subject and strengthen her skills in market research and data analysis with the use of SPSS software through the conduct of this research.

1.5. Benefits

The thesis aims at delivering Kamerastore deeper insights into consumer perspective in different market segments in order to improve their current digital marketing communications to approach and engage more effectively with customers internationally. The study will provide Kamerastore a comprehensive understanding of the different market segments in analog photography market and their characteristics, preferences as well as factors influencing their decision.

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1.6. Key Concept Terminology

For a comprehensive understanding of the researching topic, the definition of specific terms used in this research is provided as follows.

Analog (film) photography is the art of capturing physical images through using analog or film cameras manufactured since the mid-1930s and photographic films (Bellamy 2019, 8). It is the original century-old photography practice, which was later named analog photography or film photography to differentiate from digital photography, which uses digital sensors to capture the image.

Market segmentation has been practiced since the 18th century (Fullerton 2012) and the concept was first introduced by Wendell R. Smith (1956) as a marketing practice for dividing a market into smaller and distinct homogeneous consumer groups to precisely cater to their different preferences and demands (Canhoto, Clark & Fennemore 2013; Foedermayr & Diamantopoulos 2008; Goyat 2011).

Digital marketing communications are the equivalent of the traditional marketing communications mix, which combines the use of different communication tools such as advertising, direct marketing, personal selling, public relations, and sales promotion in attracting and delivering superior values to consumers while building meaningful customer relationships (Kotler, Armstrong, Harris & He 2020, 421).

1.7. Case company

Beginning from the journey of Juho Leppänen, a film enthusiast who witnessed the increasing demand for used analog cameras that he could not supply by himself, he decided to established Kamerastore together with Antti Heikkinen and Jussi Lehmus in Tampere, Finland in 2010. Kamerastore started in buying and selling repaired or refurbished analog (and digital) photography products, including cameras, optic lenses, and professional equipment as well as new accessories and photographic films. (Kameratori Oy 2019.) The company has gradually expanded and diversified its businesses into three distinctive brands: Kameratori or Kamerastore, Camera Rescue, and Camera Makers, to create coherent branding of different product and service offerings and efficiently communicate to different audience bases. Besides Kamerastore's main operation site in Tampere, the company also has small kiosks in Helsinki and Espoo, as well as representations in other European countries, Russia, and the U.S through collaboration with local film enthusiasts for its Camera Rescue project.

Kamerastore now focuses on the business of purchase and sale of used analog photography products and new accessories, darkroom products and photographic films as well as some used digital cameras and lab services to offer local demand for film development and scanning. While Camera Rescue runs the #Saveanalogcameras project in which its objective is to buy and restore 100,000 old film cameras by the end of 2020. Whereas Camera Makers is built to present the camera technicians behind the company as well as sharing their knowledge on repairing and restoring film cameras.

In addition to a physical showroom in Tampere where the analog photography products are stocked and displayed, Kamerastore operates an e-commerce business with the Kameratori.fi domain in Finnish serving domestic customers and Kamerastore.com domain in English which offers worldwide delivery to international customers. Although Kamerastore remains the major supplier with almost 90 percent of the available products, the e-commerce sites also feature products from its partnership with Fototapio and the U.S-based CatLABS. Kamerastore claims to be the largest supplier of professionally tested used film cameras in Europe with approximately 8000 items in stock.

Since 2010, Kamerastore has served over 10000 customers in over 60 countries (Kameratori Oy 2019). Based on the financial statement of the company, Kamerastore had a turnover of 1.78 million in 2019 with an increase in annual net sales by 7.1 percent. The company has witnessed steady growth over the past 4 years and now employs over 20 people. (Finder.fi 2019). Its sales consist of the e-commerce sales of quality used photography products and new supporting photography equipment as well as sales generated from its local lab services.

Content marketing is at the heart of Kamerastore's marketing activities, which play a great role in their success. Although it is highly important for the business, the company still has limited resources and hence, seeking cost-efficiency in every marketing activity and opting for affordable marketing channels such as social media instead of huge expensive advertising campaigns. Kamerastore and Camera Rescue have gained great popularity within the film community with almost 31 thousand and 54 thousand followers on Instagram respectively as well as 7700 and 9500 followers on Facebook respectively. In addition to social media marketing, the company integrated other marketing activities such as Google Ads, SEO, email marketing, and online partnerships.

2. Market segmentation

"Concentration of marketing energy is the essence of all marketing strategies and market segmentation is the conceptual tool to help in achieving this focus." - Goyat (2011).

Employed by both B2C and B2B companies across industries, segmentation is a crucial stage in any successful target marketing strategies, which set focus on customers and how to serve them best. This strategy model, also widely known as STP (segmentation, targeting, positioning) marketing model, consists of three interrelated stages: segmentation, targeting, and positioning (Leon & Joseph 2015 , 52). Besides, market segmentation is also the foundation for determining customization of the marketing mix, development of differentiation strategies, as well as identification of market opportunities and threats (Jobber & Ellis-Chadwick 2016, 204-205). Particularly, segmentation is commonly utilized by marketers to determine the most appropriate mediums for distributing advertisements (Leon & Joseph 2015, 54).

Moreover, whilst developing digital marketing plans, it is important to differentiate between the two segmentation approaches: strategic market segmentation and online tactical segmentation. Strategic segmentation is part of the STP framework which identifies the best audience or market fit for the business, while online tactical segmentation solely focuses on the most effective ways to communicate with this target audience and often employed in online targeting, for example, segmenting online consumers by activity levels. (Chaffey & Ellis-Chadwick 2016, 216.)

According to McDonald and Dunbar (2012), the number of market segments is often from five to ten. Furthermore, it is important to conduct a reality check for each market segment following their size, differentiation between their required offers, capability in determining and approaching customers from each segment, as well as their fitness to the business (McDonald and Dunbar 2012, 16-17.).

In general, the implementation of segmentation mainly took into account the choice of segmentation bases and their relevant variables as well as the criteria for market segmentation. Jobber and Ellis-Chadwick (2016) stated that the segmentation process started with the understanding of the various actors that make up the market as well as their demands and characteristics, based on which market segmentation should be developed. After that, target markets can be selected and the marketing mix should be tailored accordingly.

2.1. Segmentation variables for e-commerce.

Variables of segmentation are the elements utilized for splitting a market into different segments, which helps to determine and predict the differences in consumer buying behavior (Jobber & Ellis-Chadwick 2016, 207). There are different angles when approaching the categories of segmentation variables. General and product-specific attributes are distinct in terms of the relationship with products, services, and consumers (Kamakura & Wedel 2000, 7). Whereas, behavioral and cognitive factors (Leon & Joseph 2015, 56.) differentiate observable variables such as demographics, user status, and frequency from unobservable variables like personalities, attitudes, and benefits sought, etc. While objective variables such as demographic, geographic, or behavioral data show the picture of who the consumers are and what they do, only subjective data such as lifestyle, opinions, attitudes, and values can further explain the particular ways that consumers respond to marketing efforts, revealing why they do what they do (Darroch 2014, 100).

As regards demographic segmentation, the most typical variables used for dividing consumers are age, gender, income, life-cycle stage, among others such as ethnicity, occupation, education, marital status, etc. Demographic segmentation is widely used alone or in combination with other bases due to its cost-effectiveness and easiness in tracking, measuring, and targeting the market segments. (Kotler et al. 2020, 201; Leon & Joseph 2015, 56.) In particular, age is a major aspect for marketing a variety of products and services, for example, many companies use it to target Millennials through digital media communications (Jobber & Ellis-Chadwick 2016, 214). On the other hand, gender, which used to play a substantial role in segmenting markets in which products and services are designed and marketed naturally for either male or female, now become an inaccurate way to distinguish consumers as the boundaries between sex roles has blurred (Darroch 2014, 196; Leon & Joseph 2015, 58). Moreover, views on gender have evolved rapidly beyond the binary model since 40% of the studied consumers worldwide opposed with traditional binary perspective and 60% of Gen Z agree that forms should have other choices aside from female or male (Sloan Management Review 2020). Instead of continuing to use the classical binary conception of gender and its attached stereotypes, understanding gender as a broad spectrum and approaching these new perceptions in integration with business activities, from market research, product development to customer experience, will open a new range of opportunities for both businesses and customers (Harvard Business Review 2020).

In terms of lifestyle-based segmentation, differences in lifestyle are concerned as strong forces of influencing distinct needs and buying preferences among customers and hence, often being used to further divide markets (Best 2014, 162.). In psychographic segmentation, people are grouped based on their lifestyle or way of living which is reflected through their activities, opinions, interests, attitudes, and values. Moreover, as consumer values are relatively consistent, it forms the underlying foundation for consumer attitudes, lifestyles, which manifests into behaviors. Therefore, value-based segmentation is commonly seen in tribal marketing, in which consumers with different demographics, who share similar beliefs, feelings, and passions for a brand, would make up the tribe. Indeed, lifestyle and personality segmentation work best when consumers choose a brand for their self-expression as the brand succeeds to associate with a certain lifestyle. (Jobber & Ellis-Chadwick 2016, 212.)

The third dominant force that shapes customer needs is usage behavior which describes how, when, and how much a product is used (Best 2014, 162). Behavioral segmentation splits the market into segments according to consumer's knowledge, usage, or responses to a product or service such as purchase occasions, benefit sought, user status, usage rate, or loyalty status (Kotler et al. 2020, 203-205). Particularly, purchase occasion reflects the different occasions when consumers buy a product or service (Leon & Joseph 2015, 68), which helps businesses to create product usage (Kotler et al. 2020, 203). Besides, consumers always seek specific benefits when buying products, which makes it the most relevant base for segmentation (Leon & Joseph 2015, 68). Benefit segmentation requires the identification of the main benefits sought by consumers, the types of consumers that seek each benefit, as well as the brands that cater to each benefit (Kotler et al. 2020, 204). Due to its actionability, segmentation based on benefits can generate an overall understanding of the market as well as marketing decisions in terms of positioning, product development, advertising, and distribution (Wind 1978). Importance weights have been applied as a basis for benefit segmentation in several studies (Kamakura & Wedel 2000, 15). Additionally, since there is usually a higher consumption in a small group of consumers, usage rate or frequency becomes a great segmentation base that represents the differences within heavy, medium, light users, and non-users. Usage rate is highly linked with the level of consumer awareness of a certain product and consumer buying intention, which can result in differentiated targeting strategies. (Leon & Joseph 2015, 67-68.) Thus, different incentives and discounts can be customized to target each type of usage rate (Kotler et al. 2020, 204).

In addition to the major variable types used in consumer market segmentation such as demographic, geographic, behavioral, and psychographic variables (Kotler et al. 2020, 200), responses to the marketing mix can also be utilized as an additional classifying variable. Since the ultimate purpose of segmentation is to enable companies to effectively tailor and allocate their marketing efforts to the right consumer groups, it is also important to understand how each market segment engages with the marketing mix (Table 2), for instance, in terms of price sensitivity, preference of shopping channels or products, and consumption habits of media outlets. (Darroch 2014, 103.)

Table 2. Response to the marketing mix (adapted from Darroch 2014, 103).

The person organisation's response to the marketing mix	
Segmentation Goal: To expand the narrative to include responses to the marketing mix	
Product	Preference for different combinations of product features; reactions to new product concepts; reactions to different brand options.
Price	Willingness to pay, price sensitivity, deal proneness.
Place	Where the market looks for the product.
Promotion	Media habits what media the market is exposed to, how often, what for

In general, Kotler et al. (2020) indicated that there is no one-size-fits-all method when segmenting a market; hence, different segmentation variables should be reviewed and tested alone and in varying combinations to identify the ultimate way of structuring a market. Simultaneous use of multiple segmentation bases was recognized in actual segmentation practices with a tendency to increase the number of variables used (Foedermayr & Diamantopoulos 2008, 250). In particular, this research will give a closer examination of the appropriate segmentation bases and methods concerning international e-commerce in consumer markets, which suits the case study of Kamerastore.

Previously, segmentation models for international markets were mostly based on geographical groups, which are divided based on countries, regions, states, cities, or neighborhoods according to Kotler et al. (2020). Geographic segmentation is proven effective when there are locational differences regarding consumer consumption patterns and preferences (Jobber & Ellis-Chadwick 2016, 214). However, this method provides little relationship to the actual behavior, consumption, or usage patterns of consumers unless the market has a high level of aggregation (McDonald & Dunbar 2012, 35). Due to the varying economic, cultural, and political factors in different countries, it is essential for international businesses to divide their market into segments of differing needs and buying behaviors (Kotler et al. 2020, 206). Although the most effective strategic retail segmentation is based on consumer motivation and their needs as they guide retailers to deliver the right shopping experience, it is notable that demographic segmentation can also be the first option in case it has a good correlation with behavior data, and not to mention that it is an easily collectible and targeting variable (Perrey, Jesko & Dennis 2011, 22-23).

This leads to a segmentation method commonly used by international companies to leverage similar strategic positioning, which involves both macro-level factors such as economic, technological, geographical, cultural, or demographical characteristics, and micro-level indicators which are adapted to explore individual customers concerning their needs and desired benefits (Foedermayr & Diamantopoulos 2008, 249). This is similar to the two-level model that Gaston-Breton and Martín (2011) later proposed when segmenting the European market. The first stage of segmentation was implemented based on demographic variables of market size/potential and market economic development of selected European countries, while the second-level segmentation was identified by personal and social values of the consumers. The advantage and feasibility of using attitudes, benefits, and values to segment international markets were previously validated in the Journal of marketing research (Ter Hofstede, Steenkamp, & Wedel 1999). Unfortunately, little development of his methodology has been reviewed or updated since then (Steenkamp 2019).

2.2. Segmentation profiling and personas

In terms of segmentation profiling, marketers seek to define the characteristics linked with customers within a segment to reach them (McDonald & Dunbar 2012, 283). It is recommended that marketers should employ profiling variables such as age, location, attitude, etc. to characterize the consumers and matches the majority of customers in the segment (McDonald & Dunbar 2012, 282). In practice, profiling market segments help to create personas, which are fictional profiles that represent specific target customer segments. These personas help to better understand online consumer behavior and characteristics, hence enable the development of customer-centric strategies, online presences of the business, advertising, and web design. (Chaffey & Ellis-Chadwick 2016, 79.)

2.2.1. Understanding of online consumers

According to Oberlo (2020), the number of online shoppers, approximately 2.05 billion people, takes account for over a quarter of the world population in 2020 while being expected to keep growing to reach 2.14 billion people by the end of the year. In particular, consumers are becoming more accommodated to online purchases while leveraging digital technologies to get more well-informed during their decision-making process (Chaffey & Ellis-Chadwick 2016, 68). Moreover, as the internet and new digital communications technologies such as social media and satellite TV weakened geographic boundaries, consumers worldwide have become connected than ever before, enabling like-minded consumers to be identified and reached regardless of their countries (Kotler et al. 2020, 207).

2.2.2. Factors influencing online buying behaviors

Online consumer behaviors are likely to be influenced by psychographic and behavioral variables. In particular, characteristics such as attitude, innovativeness, knowledge, and risk aversion have proven to show important implications when evaluating the likelihood of consumers to online shopping (Jobber & Ellis-Chadwick 2016, 217). Risk aversion is the extent that consumers prevent perceived risks and seek certainty in their buying decision.

Those who have more tolerance towards risks and uncertainty are generally more open to buy from different channels and try new things (Sheth & Parvatiyar 1995). In consideration of perceived risk, it varies in relation to the consumer, products, situation, and even culture. Online shopping carries certain risks such as security risks which consist of credit card and identity thief, data privacy concerns, order-related errors or lack of delivery and satisfaction (Brashear, Kashyap, Musante & Donthu 2009), or risks in relation to finance, performance, time, social, physical, and psychological factors. Several ways e-commerce should consider to limit consumers' perceived risks are having a credible, secured, and user-friendly website, providing accessible and responsive online services, as well as flexible prices (Katawetawaraks & Wang 2011).

Furthermore, online shopping attributes such as online word-of-mouth (e-WOM) and price are identified as important factors in motivating the shopping intention of customers (Sharma, Bajpai, Kulshreshtha, Tripathi & Dubey 2019). In addition, reference groups are effective in relieving the perceived risks of risk-averse consumers besides the brand image, reputation, and certain warranty strategies (Jiuan Tan 1999). More specifically, WOM are personal recommendations and reviews coming from family members, friends, and other consumers, which are likely perceived as more trustworthy than those made by companies including advertisements and salespeople. Moreover, the growth of social media usage has facilitated e-WOM through the exchange of information among multiple communities such as blogs, social media channels like Facebook, Youtube, Instagram, Twitter, etc., as well as online shopping platforms like Amazon and eBay. (Kotler et al. 2020, 149.)

Cham and Lim (2015) suggested that an emphasis on price, convenience, branding, varied product portfolio, and again, risk aversion can enable e-commerces to drive interest and retention from online shoppers.

2.3. Criteria for effective segmentation

The often-seen failure of segmentation in producing practical and meaningful results can be avoided by the application of segment criteria to examine the robustness of the findings (Dibb & Simkin 2010). Five major criteria often taken into account when building effective segments are measurability, accessibility, substantiality, differentiability, and actionability (Kotler et al. 2020, 200).

Firstly, an effective segment must be measurable as regards its market size, purchasing power, and profiles (Kotler et al. 2020, 200).

Secondly, the segment accessibility must be evaluated whether it can be reached and served effectively and economically with tailored offers through marketing communications and distribution channels (McDonald & Dunbar 2012, 282; Kotler et al. 2020, 200; Leon & Joseph 2015, 54-55).

Thirdly, substantiality as regards the size and profitability of a segment to the extent that they can justify the appropriate allocation of resources while being sufficiently profitable, which allows businesses to pursue a customized marketing program for the segment (Kotler et al. 2020, 200).

Fourthly, the segment must be distinguishable and result in different responses to different marketing programs (Kotler et al. 2020, 200), while being identifiable in terms of its profiles with varying segmentation variables (Leon & Joseph 2015, 54).

Last but not least, the compatibility between the segment and the organizational context must reflect a sufficient level of actionability, meaning that companies should have enough resources, capabilities, and desire to tailor an effective marketing program that specifically attracts and serves the segment (Kotler et al. 2020, 207). In another word, the segment should be congruent with the objectives and resources of the company (Leon & Joseph 2015, 55).

Additionally, Leon and Joseph (2015) added that the stability and future viability of a segment regarding consumer lifestyle and consumption patterns should also be taken into consideration when evaluating the effectiveness of a segment.

Among the previously discussed criteria, profitability, growth, and size of the segment are mostly chosen for actual implementation in practice as businesses tend to emphasize short-term goals and internal factors over external forces and market trends (Foedermayr & Diamantopoulos 2008, 255). However, Best (2014) suggested also consider the competitive intensity such as the number of competitors, ease of entry, and substitutes as part of the evaluation of market attractiveness. Even when a segment is qualified as attractive based on the mentioned criteria, a low barrier to entry, availability of numerous substitutes, or intense competition within this segment among several competitors can make the segment unattractive and expensive to pursue.

In conclusion, it is important to assess the segments according to the criteria that best suit the business goals to identify the most viable segments for the business to target while ensuring their synergy with the organizational structure and capability.

3. Effective digital marketing communications elements.

Marketing communications or promotion is a crucial aspect of the 4Ps marketing mix - product, price, promotion, and place, which realizes the delivery of exceptional customer values. The role of marketing communications is to communicate with target customers in an effort to convince them to buy products. There are four core elements in the development of any potent marketing communication program: determining the target audience, defining the desired outcomes and customer responses, designing the communication message, and choosing the suitable media channels and message source (Hawkins & Mothersbaugh 2016, 18-19; Kotler et al. 2020, 426).

3.1. Target audience

Firstly, lying at the core of the marketing mix, the target audience has a substantial influence on the decisions on the communication message as well as how, when, where it will be communicated and by whom (Kotler et al. 2020, 427). Therefore, the use of segmentation helps to determine the most appropriate communication channels and media for distributing business marketing efforts and advertisements (Leon & Joseph 2015, 54.). In general, it is essential to consider market segments when building a marketing communications strategy and the different interactions between consumers and the company should be taken into account when choosing the communications/promotional channels (McDonald & Dunbar 2004, 18-24). Hence, the first step in developing a sound marketing communications plan is to identify the target audience with whom marketers aim to communicate.

3.2. Objectives

Secondly, what are the desired responses that the business seeks to receive from the target audience? Although the ultimate goal of marketing communications and advertising is to have customers purchase the products, this question should address immediate behavioral effects that the business wants to achieve with the target audience, whether it aims to make the audience learn more about the product, incline toward the product, feel satisfied with their purchase of the product, or advocate and recommend it to other people. (Hawkins & Mothersbaugh 2016, 18-19.) The buyer-readiness stage presented by Kotler et al. (2020) can be applied to understand consumers' level of readiness to purchase and used as a basis for determining the desired effects on target customers. Consumers are firstly aware of a product (awareness); and, they decide to find more information about that product (knowledge); afterward, they start to feel favorable towards the product (liking); then, they become to prefer the product over other alternatives (preference); after that, they are convinced by the values and benefits brought by the product (conviction); finally, they decide to buy that product (purchase). Based on this model, marketers may decide the objectives of the marketing communications program, whether to raise awareness of the product, provide information, persuade consumers, or reassure them to take final action. Beyond the customer purchasing decision, marketers can also decide to focus on customer retention or building long-lasting customer relationship as the communication goal (Chaffey and Ellis-Chadwick 2016, 231).

3.3. Message

"*Good marketing communications call for 'good deeds followed by good words'* " (Kotler et al. 2020, 428). After identifying the target audience and goals of the communications plan, marketers need to build an appropriate message to yield the desired responses. In particular, what types of images, words, tone of voice, or contents are more likely to relate, appeal, and generate the wanted effects from the audience? This requires a good knowledge of the customers regarding their perceptions, attitudes, preferences, and lifestyles.

A good message needs to satisfy four qualities which are to attract, maintain interest, stir desire, and gain action. Regarding the message content, it can be a topic that the audience has an interest in and thus are more likely to respond to. The message should be able to create rational, emotional, and/or moral appeal to the target audience. (Kotler et al. 2020, 428-429.) It is found to be most attractive when customers can relate and associate the message with their needs and situations. Also, marketers need to ensure the comprehension and intention of the message so that it can be properly interpreted by the target audience. Furthermore, the message needs not only to appeal to the consumers but also to generate interest in the product, otherwise, there is limited value in the message. (Best 2014, 326.)

3.4. Selection of marketing communications channels & tools

Finally, marketers need to find out the touchpoints between customers and the business as well as the means to effectively approach and communicate with them. There is very limited discussion on media channels as a separate topic and it is often associated with the communications tools. For example, Chaffey and Ellis-Chadwick (2016, 29) referred to digital media channels as the online communication tools which are employed to reach specific organizational goals. However, the choice of media channels has earned more attention due to the rising media cost and swift to niche targeting strategy, hence it should be separated from communication tools. Media channels are the platforms in which businesses distribute and place the message by using selected communication tools to reach a target audience. Thus, it is important to select the right mix of both communication tools and media to achieve the objectives of the marketing communication program. (Jobber & Ellis-Chadwick 2016, 420-428.)

The selected media channels must be able to realize the communication goals (Jobber & Ellis-Chadwick 2016, 428) while balancing between the preferences of customers and the business. As customers might prefer a different mix of channels for their decision-making while the company has a different preference of channels based on their cost-effectiveness and values to customers. (Chaffey & Ellis-Chadwick 2016, 229-230.) Digital channels are selected for the research since they have a relatively low cost while enabling international reach and a great degree of measurability and flexibility in adjusting ad co tents, online merchandise, prices, etc. in real-time (Jobber & Ellis-Chadwick 2016, 428).

3.4.1. Digital marketing communication channels

To identify the different online communications channels that are effective in reaching target customers, marketers must first understand their online journey. The online marketplace map developed by Chaffey and Ellis-Chadwick (2016, 63) illustrates the digital journey of customer segments to the main site of a company through different types of online channels such as search engines, other intermediaries, and media sites. The goal is to evaluate the different ecosystems in the digital market space as well as their visibility and impact on the online behavior of each customer segment to effectively plan a digital marketing campaign.

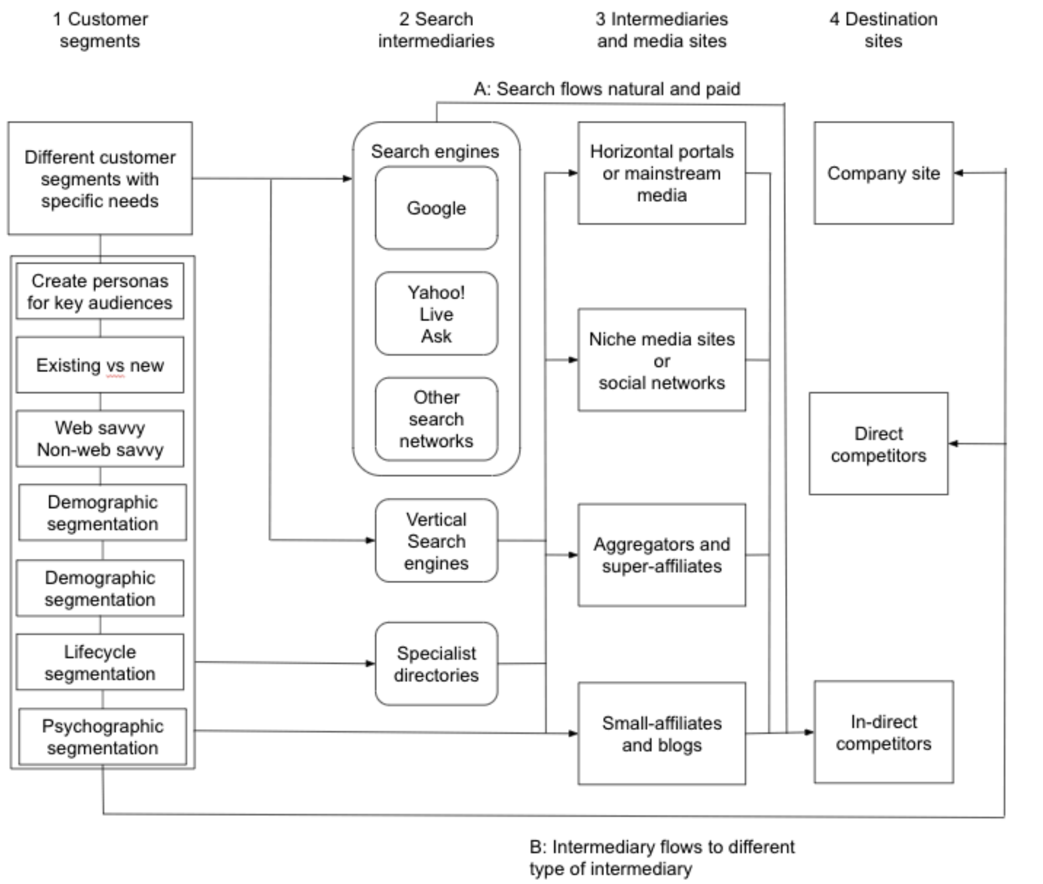

Figure 1. Online marketplace map (adapted from Chaffey & Ellis-Chadwick 2016, 63).

In terms of search engines, they are recorded as the primary source for discovering new products and brands by Globalwebindex (2020) as consumers use them to make generic, product-specific, or brand searches. Among all search engines available for use, Google holds its position as the dominant player with over 90% market share in the past 10 years. Other players listed in the top 10 search engines in 2020 are Yahoo!, Bing, Baidu, Yandex, DuckDuckGo, Sogou, Ecosia, Shenma, and Naver, which take up most of the remaining global market share. (StatCounter 2020.) The consumer choice and usage of different search engines mostly depend on demographic and geographic factors and sometimes personalities or values of consumers, which generates distinct market segments within the search engine market. For example, Baidu is the primary search engine used in China, while Korean people use Naver as the main search engine and Yandex is widely used in Russia. On other hand, DuckDuckGo has gained significant growth in the past three years among those who concern about their privacy online and hence has shifted their preference of search engine to DuckDuckGo (WebFX 2020). In addition, people who concern about the environment and understand how search engines produce environmental footprint are more likely to use Ecosia, a search engine powered by Yahoo! and Bing (Ruch, Schmidt, Decker & Kolbe 2011). Besides the mentioned search engines, social search engines from social media such as Youtube, Facebook, and others must be taken into consideration as well since they have grown to be the primary source for researching about products and brands among young consumers between 16 and 24 years of age according to Globalwebindex (2019). By identifying the appropriate search engines used by each consumer segment, companies can harness search traffic by implementing paid advertisements provided by the search engine as well as developing effective search engine optimization (SEO) and affiliate marketing (Chaffey and Ellis-Chadwick 2016, 64).

With respect to intermediaries, there are four major types of intermediaries: media sites, social media networks, aggregators, and affiliates.

- **Media** sites consist of both popular news media sites and niche media sites. Mainstream news media sites are the online outlet of traditional print media such as The Guardian, Times, The New Yorkers, and many others. A few online niche media that focus on photography are Petapixel, Fstoppers, Fish Eye Magazine, etc. These media sites are usually open to the public, however, more and more major media are shifting to different paywall strategies in which consumers are required to pay for access to exclusive and quality news or digital version of the print magazine while some free contents are still offered for the general public. Besides, it is fascinating that over 50% of the news consumption occurs within social media platforms such as Facebook, Youtube, and Twitter. Online consumers can be redirected to the original media source to read the full article or view the whole video if they are interested in more detail. (Digital News Report 2018.)

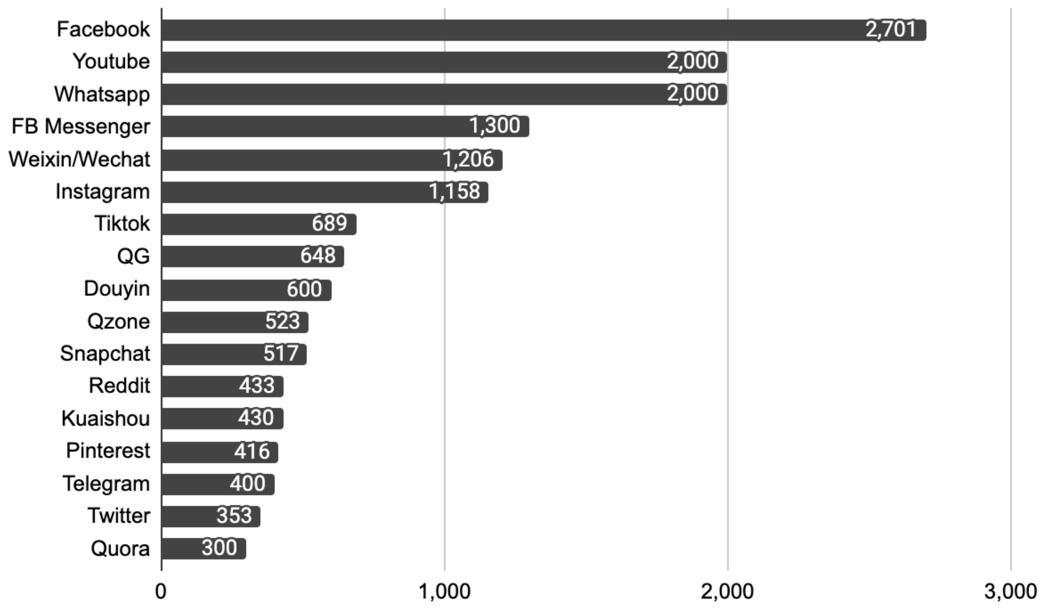

Figure 2. Global market share of social medias (adapted from Data Reportal 2020a).

- **Social networks** are the most effective online ecosystems in driving sales while yielding interaction between consumers and brands. As the Covid-19 has driven more people to adopt social media as well as online shopping, the number of global active social media users has accelerated to 4.14 billion people with a strong annual growth of 12 percent, which means that over half of the world population is now using social media. In addition, Internet users now spend an average of 2.5 hours on social media on a daily basis, which accounts for a third of their total online time. (Data Reportal 2020a.) Among the most popular global social networks, Facebook still maintains its market leadership with 2.7 billion monthly active users as of October 2020, followed by other platforms including Youtube, Instagram, Tiktok, Snapchat, Reddit, Pinterest, Twitter, etc. (Figure 2). In particular, there is an increasing number of Instagram accounts dedicated to film photography. The single hashtag #filmphotography has already accumulated over 25 million posts across this platform. In addition, figure 2 also showed that instant messaging applications such as Whatsapp, FB Messenger, and Telegram are considered as social platforms due to their large user base with Whatsapp having 2 billion active users monthly, equivalent to YouTube users base. Instant messaging applications are considered an effective channel for businesses to communicate with customers in a personal manner. However, marketing efforts in these platforms are often tricky as they can be easily perceived as spam which hinders the desired effects on the target audience. Besides, some platforms are more prominent in specific countries such as China where Facebook and other international social networks are replaced with WeChat, QQ, Douyin, Weibo, Qzone, and Kuaishou. Furthermore, businesses can harness the potential of social media for targeting influencers, which is a cost-effective means of delivering customized messages while exclusively engaging with several customer segments

(Canhoto et al. 2013.).

- **Aggregators are sites specialized in price comparison.** While used digital camera gears have Bokeh Market, Usedlens.co.uk is an aggregator particularly designed for comparing prices among film cameras and lenses which just expanded their coverage to European and American retailers (UsedLens 2020).

- **Affiliates** are companies and individuals that promote products or services in exchange for a commission. This includes influencers, YouTubers, and bloggers, who often have great outreach to specific online audience bases. In terms of analog photography market, 35mmc, Japan Camera Hunter, Film Photography Project, Emulsive, I Still Shoot Film are among the popular niche blogs with a variety of topics on film photography. While YouTubers like Willem Veberck, Negative Feedback, Matt Day, for instance, are very well-known among the young generations in the film community, hence have certain influences on this audience.

Regarding destination sites, they are the site that a company wants to direct their target audience to where they can navigate all information about the business such as introduction, product catalogs, reviews or testimonials, delivery information, and payment, etc. For an e-commerce business, two typical options for selling online are building a company website that hosts transactional sites and establishing a shop in an online marketplace such as Amazon, eBay, or social platforms such as Facebook and Instagram. Marketplaces are a great option for new and small businesses, however, in the long run, a company needs its own website in order to seriously grow as a brand and build customer relationships with greater flexibility and capability regarding its strategic marketing mix. (ShipBob 2018.) Moreover, a website enables e-commerce businesses to gain deeper insights into the online behavior of their website visitors such as which source brings them to the company website, which website pages they visit, how long they stay on each page, what types of action they take while visiting, etc. The traffic sources to a website can be classified into six main categories:

- Organic Search: Indicates visits from organic (unpaid) search results.
- Paid Search: Indicates traffic from PPC campaigns run in search results.
- Direct: In general, indicates visits where users navigated directly to the URL or the source of the visit is unknown. This source of traffic may include visits prompted by offline media where the URL is typed in or ‘dark social media’ where people click through from a social network update on a mobile app which doesn’t have campaign tracking added.
- Email: Indicates traffic from links clicked in email messages, whether mass email marketing or individual messages.
- Social: Indicates visits from social networks (Facebook, Twitter, etc.).
- Referral: Indicates traffic where users clicked a link from another site, excluding major search engines.

(Chaffey 2020)

The importance of each channel varies according to the business models and the purpose of the communications activities. For retailers, Wolfgang Digital (2019) revealed that organic and paid search account for roughly 60 percent of all website visitors, followed by other traffic sources such as direct, referral, social, email, display, and others. Although social was shown to only generate roughly 5% of the total traffic, it was estimated to be much higher in reality due to the difficulty in tracking "dark social media" visitors which is counted in direct source as explained above.

In conclusion, the analysis of online marketplace is necessary for determining the different online behavior, consumption of online media, desired type of content, and experiences of each customer segment. (Chaffey and Ellis-Chadwick 2016, 63.). Based on these findings, marketers are able to develop effective digital marketing communications programs that deliver the desired types of information and relevant messages to each customer segment through their preferred online channels, which results in higher responses to the company's marketing efforts.

3.4.2. Digital marketing communications tools

After understanding different online marketing channels and their impact on consumers, marketers must decide the most effective promotional tools and tactics to reach and interact with the target audience and achieve their set objectives.

In the past two decades, the Internet and the popularization of social media have paved the way for new marketing communications development. The Internet allows marketers to send audio, text messages, and video as a multimedia channel, while also generates an ideal environment for marketing communications activities in the promotional mix. As a result, digital technologies enable the accommodation of almost every aspect of the communication mix to the online environment. (Jobber & Ellis-Chadwick 2016, 429.) Equivalent online communications tools are classified into six key groups as shown in figure 3.

To choose the most effective mix of the promotional mix, it is important to understand the advantages and drawbacks of each marketing communications tools as well as their different impacts on the target audience while considering their compatibilities with the company's objectives and resources. In this research, the researcher will investigate search engine optimization, pay per click advertising, online public relations, and social media marketing, all of which are proven to be effective when used together as a traffic building campaign.

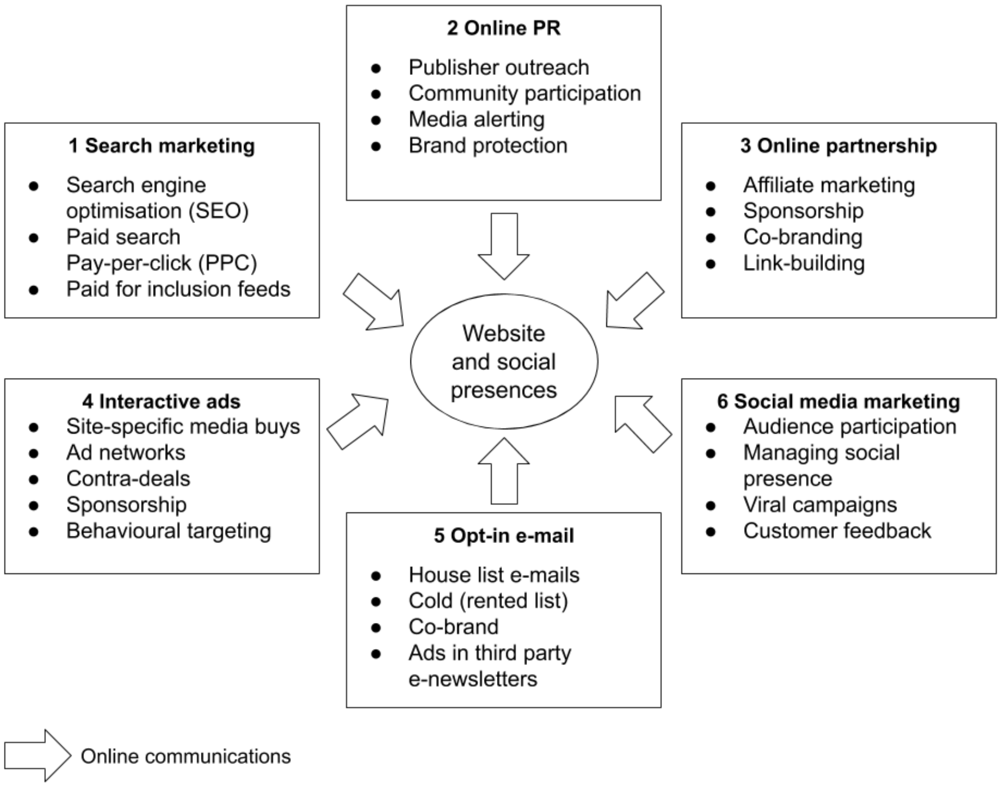

Figure 3. Digital communications tools (adapted from Chaffey & Ellis-Chadwick 2020, 33).

Furthermore, increasing on-screen time and demand for top-notch content are the drivers for content marketing, which remains to be the most important marketing strategy for e-commerce now and in the future (WordStream 2020). Being at the heart of digital marketing, content marketing is essential across all major promotional tools such as SEO, conversion rate optimization, social media, and email marketing because relevant and good content helps increase visibility, interact with the target audience as well as acquiring leads and sales (Chaffey D. & Ellis-Chadwick F. 2016, 449). In addition, content marketing is believed to play a great role in customer acquisition as almost half of the content created by B2C marketers was for generating awareness and interest in consumers, while educating and building trust to influence consumer consideration and evaluation or purchase account for 20% and 18% of the total content respectively. The most used and highest performing B2C online contents are social media, blog posts, and email newsletters. (Content Marketing Institute 2020, 21-22.)

3.4.2.1. SEO

SEO is a structured marketing technique used for the purpose of promoting a company or its products' ranking organically in the results listings of search engines for certain keywords or phrases researched by online users. Among over 200 elements of positive and negative factors that Google uses to determine the position of a site through its search ranking algorithms, it is most important to match the web page content with the keywords or phrases searched by online users as well as the number and quality of links directing to the web page so-called backlinks or inbound. Quality of links refers to the reputation of the source of links as well as the context in relation to the keywords or phrases. Furthermore, quality and relevant content are required to drive marketing is proven to be the ultimate way to acquire quality backlinks. (Chaffey D. & Ellis-Chadwick F. 2016, 485-488.)

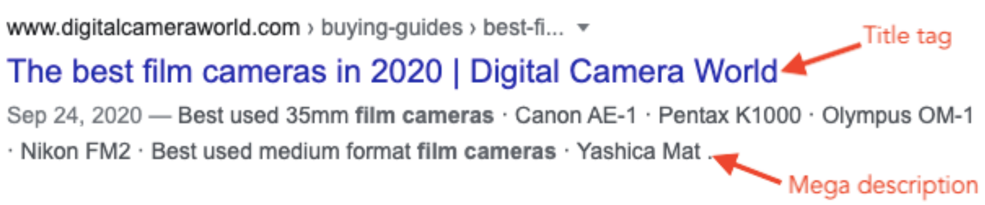

Figure 4. SEO title & mega tags.

Title tags which is the short text describing the content on the page and meta descriptions which are the longer version of the page description are the most important tags that marketers need to pay attention to (Figure 4). The title tag should appeal to the target audience, include related keywords or phrases and the company or brand name and have no more than 75 characters. Whereas the meta tag can extend to 160 characters and should be relevant, differentiated, and comprehensive, which can increase click-through rate (CTR) and potentially support improvement in ranking position. Besides, site structure is another significant factor in SEO performance. A good site structure must have logical navigation flow, comprehensive URL structure, two site maps with one for search engines in XML file and the other for web visitors, alt text for pictures, not too much use of Flash, and limited duplicate content as well as a good understanding of Webmaster Tools (Google). In addition, marketers need to ensure that all web pages are optimized for all devices such as desktop, tablet, and mobiles to drive their rankings in Google. Moreover, marketers should not only focus on creating social media content at the expense of website content, which would harm its SEO performance. (Kingsnorth 2016, 98-102.)

3.4.2.2. PPC advertising

Pay-per-click (PPC) marketing consists of search, display, and shopping advertisements through using services provided by search engines and social network companies such as Google Ads and Facebook Ads. With search ads, companies can engage with new customers at the right time when they are seeking relevant information about the products or services. Particularly, Google Ads allow marketers to create and modify ad content, select relevant keywords or phrases to match with the target audience, and pay whenever the ads are clicked on. Furthermore, sponsored links are given a higher position on the listings of search engines than natural links. The top position in the search listing requires not only a relatively high bid on certain keywords but also a high click-through-rate (CTR). Thus, the relevance of ad copy, landing pages, and searched keywords determine the quality score of the ads and hence their position on the search listings. (Chaffey & Ellis-Chadwick 2016, 497).

Moreover, display ads that involve online banners on websites are usually used for retargeting purposes to drive consumers back to the company sites. Whereas shopping ads allow marketers to directly promote their available product offerings from their catalogs to the target audience. What makes shopping ads powerful is the fact that it is placed on the top of search listings. Consumers can see and compare prices of similar products offered by different vendors in the shopping ads listing. Shopping ads and retargeting display ads are a great combination that is proven successful for e-commerces.

In addition, given the increasing importance of video content, Google Ads also offers another type of advertising campaign so-called video campaign. Video campaign allows advertisers to “show video ads on their own or within other streaming video content on YouTube and across the Display Network” (Google 2018).

Unlike SEO, PPC advertising allows more control over how content is delivered to the online target consumers via sponsored search listings (Chaffey & Ellis-Chadwick 2016, 484).

3.4.2.3. Social media marketing

Social media undoubtedly have significantly changed the way businesses communicate and interact with their customers with an expanding role in the consumer purchase journey. It was recently reported to prevail search engines as the primary sources for researching information about brands and products among young people between the age between 16 and 24. Overall, 43 percent of global online consumers from 16 to 64 years old used social media platforms while researching what to buy. (Globalwebindex 2019.) Moreover, it is a powerful online marketing communications tool due to its immediacy, cost-effectiveness, and capability for social sharing and engaging with consumers (Kotler et al. 2020, 527.)

Social network platforms offer online space for communities with a shared interest and facilitating open conversations and a sense of belonging. It can also be a publishing space for content creators, social commerce, and entertainment sources. Thus, it is important to pay attention to ensure the message content and tone in order to meet the target communities’ expectations. (Jobber & Ellis-Chadwick 2016, 428.) More specifically, they allow consumers to engage with brands and share their experiences whether it is good or bad with others. Thus, customer service in social media channels is of utmost importance for the success of businesses. Furthermore, social media networks enable brands to generate and facilitate mass WOM such as recommendations. (Kingsnorth 2016, 152-154.) Several ways to develop WOM are buzz marketing, viral marketing;

community marketing that forms communities with shared interest about the brand including fan page and forums; influencer marketing that establishes partnership with opinion leaders to share their recommendation of the brand; conversation generation through appealing and interesting advertising messages or other promotional campaigns; brand blogging to share valuable information that consumers are interested in; and referral program which motivates customers to refer the brand to their friends (Chaffey & Ellis-Chadwick 2020, 530).

4. Research Methodology

This chapter describes actions to be taken to investigate a research problem, and the rationale for the application of specific procedures or techniques used to identify, select, process, and analyze information applied to understanding the problem. Furthermore, the reliability, validity, and research ethics will also be discussed at the end of this chapter.

It is essential for commencing the research planning process by constructing and formulating the research questions as it is impossible to develop knowledge on a specific topic without asking the relevant questions (Alvesson & Sandberg 2013). The design of the research process is illustrated in figure 5.

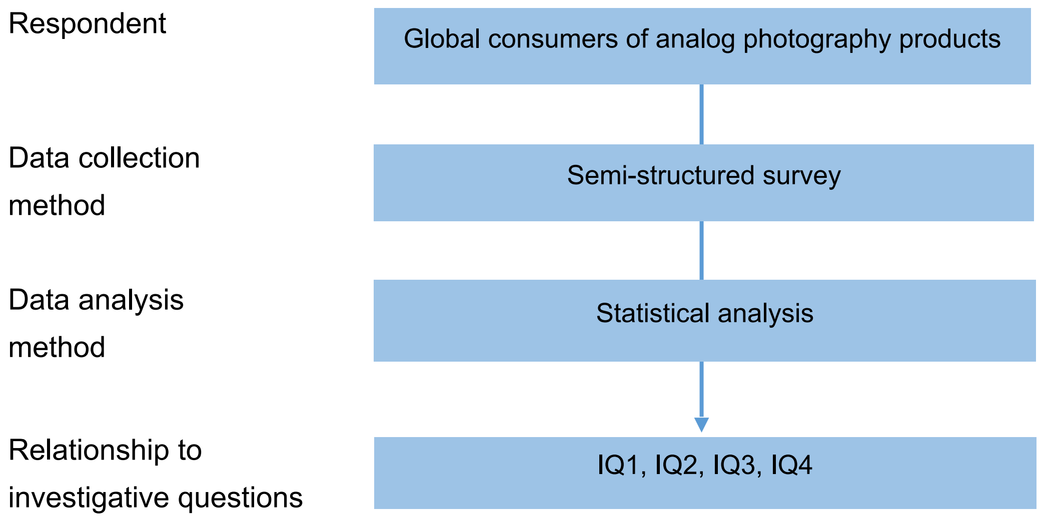

Figure 5. Research process design.

On one hand, the marketing research done for this thesis aims to understand different segmentation variables based on consumer perspectives and explore the possibility of more structured and practical market segmentation for the case company. On the other hand, the purpose of this thesis is to identify the appropriate digital marketing communications elements and potential online promotional tools to help reach each segment and increase traffics to the e-commerce site.

The research is conducted by a quantitative approach which consists of the collection, transformation, analysis of statistical data as well as interpretation of the outputs.

4.1. Data collection method

An online survey was decided as the method of data collection, and the responses were analyzed with statistical and possible qualitative methods depending on the question type. For the purpose of segmentation, a quantitative survey study is used to collect data from consumers of analog photography products as this method has the flexibility and capability in gathering numerous forms of data such as demographics, geographic, behavior, attitudes, etc. In reality, survey data is used for most market segmentation analysis due to not only its easiness in collecting data but also its cost-efficiency. (Displayr 2018.) In addition, the survey method is considered suitable for large sample size, thus, increasing both the quality and objectivity of the results (Burns, Bush & Veeck 2016, 99).

The survey was decided to be implemented in collaboration with the Camera Rescue brand to thus yield a more organic response from the consumers. In the questionnaire, different types of questions will be employed, such as multiple-choice questions, the Likert-style 4-point rating in which participants are required to select how strongly they agree or disagree with a statement. After the quantitative data is collected from the respondents, the author will utilize the SPSS software to conduct an analysis of the responses to answer the investigative questions.

4.1.1. Sampling selection

The survey will be distributed to existing customers and potential customers of the company through different online channels such as social media, blogs, and emails because of its cost-effectiveness, speed, and the potential of attracting a greater number of responses due to the ease of online sharing. Besides, the author also collaborated with multiple influencers in the analog photography community to spread the surveys. The number of participants in this research was estimated to exceed 7000 respondents from the 2017 survey. Moreover, as the survey was implemented in English, respondents to the survey were proven to have an adequate understanding of English that enables them to consume online content in English. Kamerastore currently operates two e-commerce sites, one in Finnish and one in English, therefore, the surveyed respondents qualified as potential visitors to e-commerce.

4.1.2. Pilot test

The author will create a pilot test of the survey with 15 individuals who fit the market segments, in this case, the employees of Kamerastore, prior to the distribution of the final survey to the different mentioned channels. After which, misleading questions will be identified and rewritten in order to prevent the respondents to the final survey from feeling confused.

4.2. Data analysis

To answer the research question, the market segments must be first established. Among the two methods for segmentation such as a-priori or post-hoc approach and descriptive or predictive methodology (Wedel & Kamakura, 2000; 17.), post-hoc approach will be employed to construct the number of segments. More specifically, descriptive method using clustering analysis provided by SPSS Statistics software will be conducted to evaluate the relations among variables. In addition, the analysis will adopt descriptive analysis for some questions to comprehend the overall result at large (Burns et al. 2016, 317). Moreover, the research will adopt a-priori method such as cross-tabulation to seek possible differences among the distinct segments regarding their usage behavior, etc. as well as identify the suitable marketing communications channels for reaching these segments.

Collector	By default the Collector is a male in his sixties. He has a collection of cameras that he has accumulated during his life. The biggest hoarders couldn't help themselves when the prices plummeted when digital came by storm and have amassed hundreds or even thousands of cameras. The collector doesn't actually use his cameras and they gather dust and decay slowly into a state where CLA is needed. More importantly the collector doesn't use film unless someone asks him to shoot a portrait at the family reunion and he fires his trusty Metz at everyone's faces.
Gearhead	Typically a 34-year-old male engineer, the Gearhead is someone who loves to mount analog stuff on his digital camera. He has used film when he was young and / or dreamed that it would be nice to just shoot film and not worry about Lightroom pixel peeping. He loves the quality of gear almost more than the end result it produces. However he hasn't ventured back into the analog world in a way where he would consume more than 2-3 rolls of film a year.
Artist	Not as strongly defined by age or gender, the Artist is more of a a philosophical group. The Artist believes in film as a concept – an age old analog way to preserve time and emotion through the centuries without the worry of it becoming unreadable data. The Artist uses a lot of film, developers and photographic paper, but camera gear is just a means to an end for them, which usually makes them bad at helping Newcomers get an easy entry into using a camera without automation.
Newcomer	Newcomers are more concerned about having their shots on social media than as prints. They want good quality scans and are willing to send their film to another country if the lab has the right amount of Instagram followers. The Newcomers love Canon AE-1:s with Portra loaded into them. They shoot a lot of film when they find a good working camera and a good lab to service them, as they are still not ready to do developing themselves – especially for color pictures. The three previous groups may not understand the ways of the Newcomers, but there is a lovely esthetical philosophy in their photography – they just do things differently than the previous generation.

Figure 6. Four member groups of the global analog scene (adapted from Camerarescue 2017.)

The data analysis attempts to seek the changes in the market segments established from the 2017 survey in order to answer the first investigative question, which is used as a foundation to further elaborate on other investigative questions. Thus, certain analysis results from the old survey are used to analyze the possible development. In particular, four pre-determined personas were adopted in the 2017 survey, which divided the consumers of analog photography products into different segments, to gain a general understanding of the film community. These distinct "analog" personas based on age and different usage behaviors were originally created by Camera Rescue (2017) through his qualitative research and in-depth industry knowledge: Collector, Gearhead, Artist, and Newcomers (Figure 6). It was also indicated that the analog camera users usually related to more than one persona, which could make them a mix of the four personas.

Based on nearly 7000 responses across over 100 countries, the 2017 survey further identified five customer segments in which analog photography consumers were found to be either more dominant in one of the four personas or balanced among the given personas. The analysis also described these personas in more detail in terms of their age group, geographic location, offline social groups, and the number of film cameras owned.

5. Results

In this chapter, the outcomes generated from the statistical analysis of the gathered survey data will be discussed in detail to answer the investigative questions. Firstly, the respondents will be introduced through a general descriptive analysis. Secondly, the analysis result will be presented in four parts in accordance with the investigative questions given in chapter 1.2.

5.1. General overview of the respondents

The survey received a total of 3243 responses over 1.5 months, which was less than 50% of the number of answers collected in the 2017 survey. There could be several reasons behind this downfall in the number of respondents. Firstly, because social media platforms such as Facebook, Instagram, and reddit are the main channels for spreading the survey, it could be partly due to the series of change in algorithm of social media including Facebook and Instagram since 2018 that decrease the outreach of both organic and sponsored posts (Falcon.io 2019), and hence limit the reach of the survey. Besides, as the number of social media users along with the amount of content increased significantly according to Our World in Data (2019) while the collective attention span of internet users is narrowing (Hövel, Mønsted, Lehmann & Lorenz-Spreen 2019), the competition on social media has also become fiercer. Moreover, this questionnaire has a relatively high number of questions (37 questions) and a third of them were commercial, which could potentially hinder the reader's willingness to finish the survey. Therefore, the lower number of answers did not reflect whether the number of global analog photography consumers decreased or increased.

Although it did not meet the prior expectation of the researchers, the data should be more than enough to produce reliable analysis results. The need for manual data cleansing was realized as some inaccurate answers were identified that could potentially skew the data reliability, which could be the result of concern about data privacy. After these responses were eliminated from the survey data, 3238 out of 3243 answers remained for the final analysis result.

Regarding gender distribution, table 3 shows that the majority of the respondents were male while female and other respondents only comprised 10.9% and 1.5% of all surveyed analog camera users respectively.

Table 3. Gender (n=3238)

	Frequency	Percent
Female	354	10.9%
Male	2835	87.6%
Other	49	1.5%
Total	3238	100%

Additionally, it is interesting that only 10.5% of the total respondents also participated in the 2017 survey (Table 4), which only made up approximately 4.8% of the total respondents in 2017. Therefore, the majority of the respondents from this survey are different individuals from those answering to the 2017 survey.

Table 4. Number of respondents who took part in the 2017 survey (n=3237)

	Frequency	Percent
Yes	339	10.5%
No	2898	89.5%
Total	3237	100%

5.2. Changes in market segments between 2017 and 2020

Two-step cluster analysis using SPSS software was employed to identify the dominant persona type as the market segment by using the four pre-defined personas. After several clustering trials, 6 clusters were identified in figure 7 as the most distinctive and effective group with a high score in segment quality: the Balanced Collector, the Pure Artist, the Gearhead Artist, the Newcomer Artist, the Newcomer Gearhead, and the Newcomer (Appendix 2).

As regards the average persona type strength of each segment, the respondents in 2020 are more prone to relate to multiple personas rather than having just one dominant persona in 2017 (Figure 7).

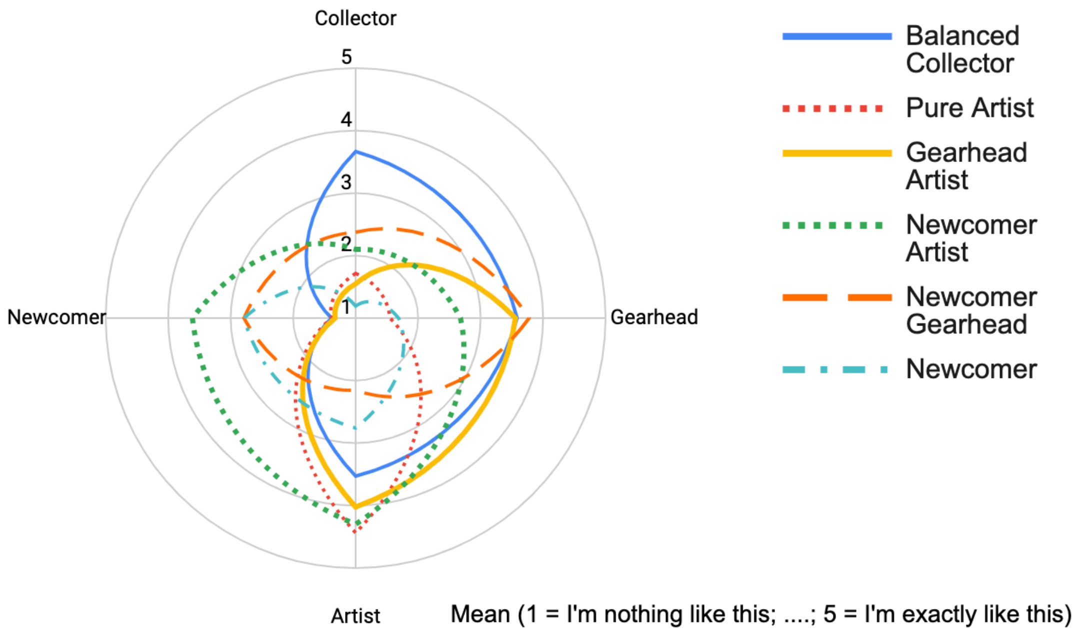

Figure 7. Average persona type strength among segments (n=3238)

- The Balanced Collector is dominantly Collector while also being an Artist at heart with a passion for analog camera gear.
- The Pure Artist is into analog photography for the sake of artistic expression and the philosophy behind it.
- The Gearhead Artist is dominantly Artist who is also enthusiastic about the analog gear themselves.
- The Newcomer Artist is mainly Artist and Newcomer at the same time.
- The Newcomer Gearhead is mainly Gearhead and Newcomer simultaneously.
- The Newcomers are those that are relatively new to the analog photography scene and don't feel related to any of the personas.

(Appendix 2; Figure 7.)

In general, the Newcomer persona was mostly used as a second dimension for dividing the segments. Thus, these 6 segments can be further grouped into 2 larger segments: the Analog Newcomers consisting of Newcomer Artist, Newcomer Gearhead, and Newcomer, and the Analog Professionals including Balanced Collector, Pure Artist, and Gearhead Artist.

According to figure 8, there is no significant difference in the size of six individual segments in 2020. In particular, the largest segment namely Gearhead Artist consists of 22.5% of total responses, while the smallest segment, Newcomer Gearhead, makes up roughly 12% of all respondents.

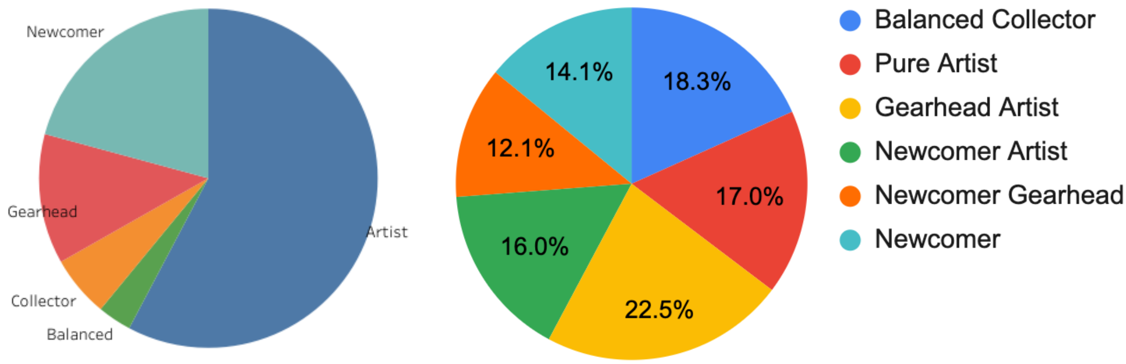

Figure 8. Global distribution of different persona-based segments in 2017 and in 2020 (n=3238)

The distribution of different segments in 2017 and 2020 is shown in figure 8. It is clear that the Artist persona is considered significant in almost all segments with an exception for Newcomer Gearhead and Newcomer. In comparison with the distribution of segments found in 2017 (Figure 8), the group of Artist-dominant segments including Pure Artist, Gearhead Artist, and Newcomer Artist remain its leading role with the largest distribution among all respondents, 57.76% in 2017 and 55.5% in 2020. In addition, the Gearhead segment in 2017 accounted for only 12.4% of the total respondents. Whereas in 2020, the Gearhead persona is considered relevant in 57.8% of the total respondents, consisting of Newcomer Gearhead, the Gearhead Artist, and Balanced Collector. Furthermore, the importance of the Collector persona has raised from 5.8% in 2017 to 18.3% in 2020. In terms of Newcomer persona, it was dominant in 20.8% of the total surveyed analog enthusiasts in 2017. As of 2020, three segments that somewhat relate themselves to Newcomer which are Newcomer Artist, Newcomer Gearhead, and Other Newcomer, overall accounts for 42.2% of all the answers in combination, doubling the number from 2017.

In terms of age distribution (Figure 9), the digital photography native who were under 34 years of age in 2017 accounts for over half of the total surveyed analog enthusiasts. In 2020, a similar group of respondents identified as digital era natives includes those 41 years old or younger who were under 21 at the time digital cameras were introduced to the mass market. This group has grown to over 71% of all respondents in 2020. In particular, the number of youngsters under 15 has significantly increased from less than 0.7% in 2017 to 11.1% in 2020.

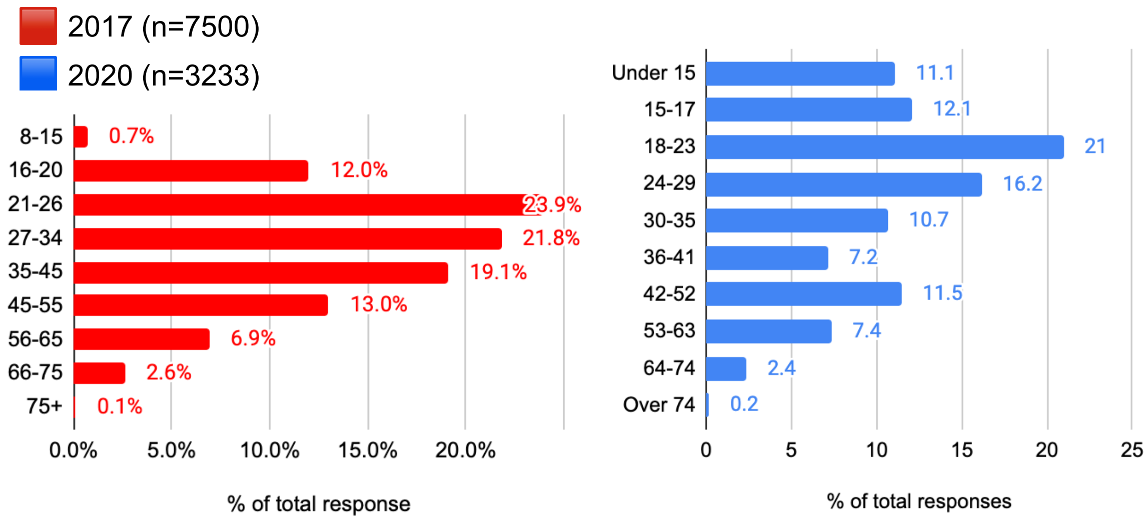

Figure 9. Age groups in 2017 and 2020.

In terms of generations, table 5 describes the role of different generations, which were grouped based on Pew Research Center (Dimock 2019), in the current analog community. It is discovered that the analog community are becoming younger as more and more GenZ are joining and adopting film photography, particularly forming 41.4% of all respondents. They will become the main buyers of film cameras in the near future, hence playing a great role in the future of the analog photography market. At the same time, Millennials remain their role as the core users of film cameras. This finding matches and further validates the recent statement from Leica, the only standing manufacturer of new film camera. In particular, the global production director of Leica said that the demand for film cameras had outgrown its production capacity with large interest generated from the younger photographers who are under 36 years old. (Evans 2020.) Furthermore, there is a tendency that the number of female users of analog cameras grows in younger generations such as GenZ and Millennials (Appendix 3).

Table 5. Distribution of generations (n=3233)

	Frequency	Percent
GenZ (7-22)	1342	41.4%
Millennials (23-38)	1082	33.4%
GenX (39-54)	541	16.7%
Boomers (55-73)	258	8.0%
Silent (74-91)	10	0.3%
Total	3233	99.8%

In terms of age distributions in relation to different segments (figure 10), the Analog Professionals segment group gradually becomes more prominent in the older age groups with over 65% in the 30-41 years old group and above 75% in the 42 plus. In opposition, people of ages under 24 are more likely to belong to one of the Newcomers-associated segments. There is less than 25% of Newcomers in the age groups above 41 years old.

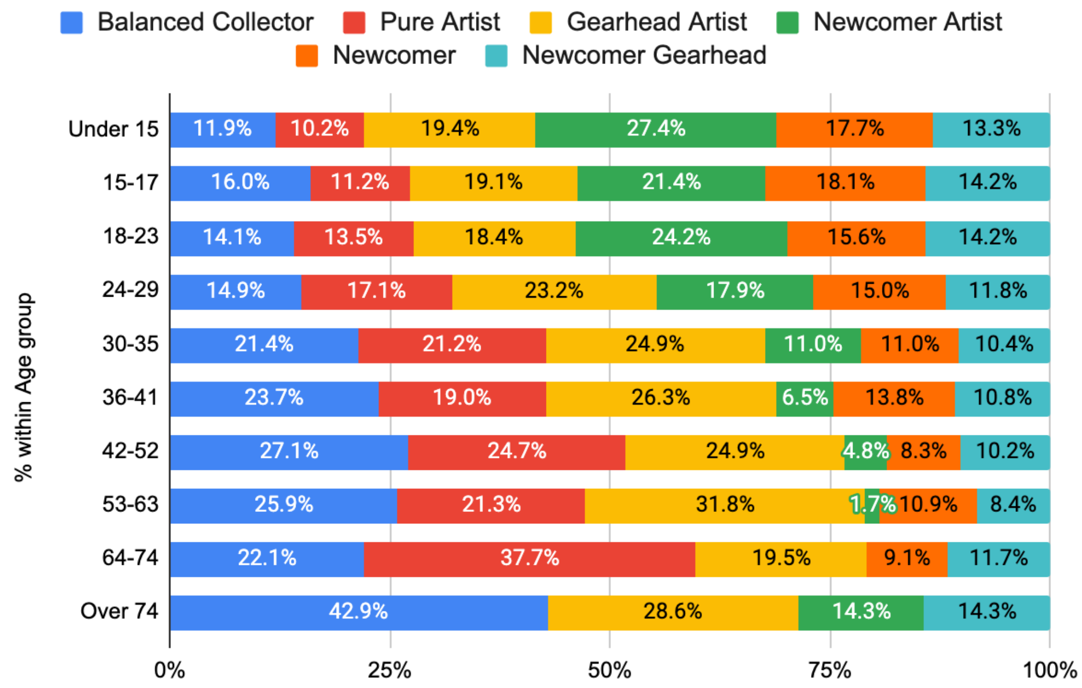

Figure 10. Distribution of different segments in age groups (n=3233).

In terms of location, the results are dispersed in 94 countries and many countries only have one answer, which is insufficient for data analysis. Therefore, the respondents are categorized according to regions based on the United Nations country grouping (Internet World Stats 2020). Roughly 50% of the respondents are from Europe, 34% are from North America including the U.S. and Canada, and 5% are from Asia which consists of Japan, India, and mostly Southeast Asian countries. Latin America & the Caribbean region including Brazil, Mexico, Argentina, etc., and Australasia region comprised of Australia and New Zealand account for 4.4% and 4.2% respectively. The rest 1.4% of the respondents come from the Middle East and Africa. (Table 6.) The data analysis will focus on relevant regions with sufficient data, thus excluding the Middle East and Africa from the following analysis.

Table 6. Geographic regions (n=3238)

Regions	Frequency	Percent
Europe	1639	50.6%
North America	1107	34.2%
Asia	167	5.2%
Latin America & the Caribbean	143	4.4%
Australasia	135	4.2%
Middle East	27	0.8%
Africa	20	0.6%
Total	3238	100.0%

Figure 11 shows that Newcomers are prominent in Asia with 60% of the respondents, among which 20.4% are Artist-oriented and 17.4% are also Gearhead. The Balanced Collectors are mainly located in North America, Australasia, and Europe, which account for approximately 20% of the total respondents in each region. Overall, respondents based in Europe, North America, Australasia share a similarity in the division of different segments in which the Analog Professional group segment is relatively larger than Newcomers. Particularly, the Gearhead Artist segment is slightly larger than all other segments at 22-23%. In addition, Latin America & The Caribbean has a relatively even distribution between Analog Newcomers and Analog Professionals. What is more, the Artist-based segments including Newcomer Artist, Gearhead Artist, and Pure Artist are the core members of the film community located here with over 65% of the total respondents living in Latin America & the Caribbean.

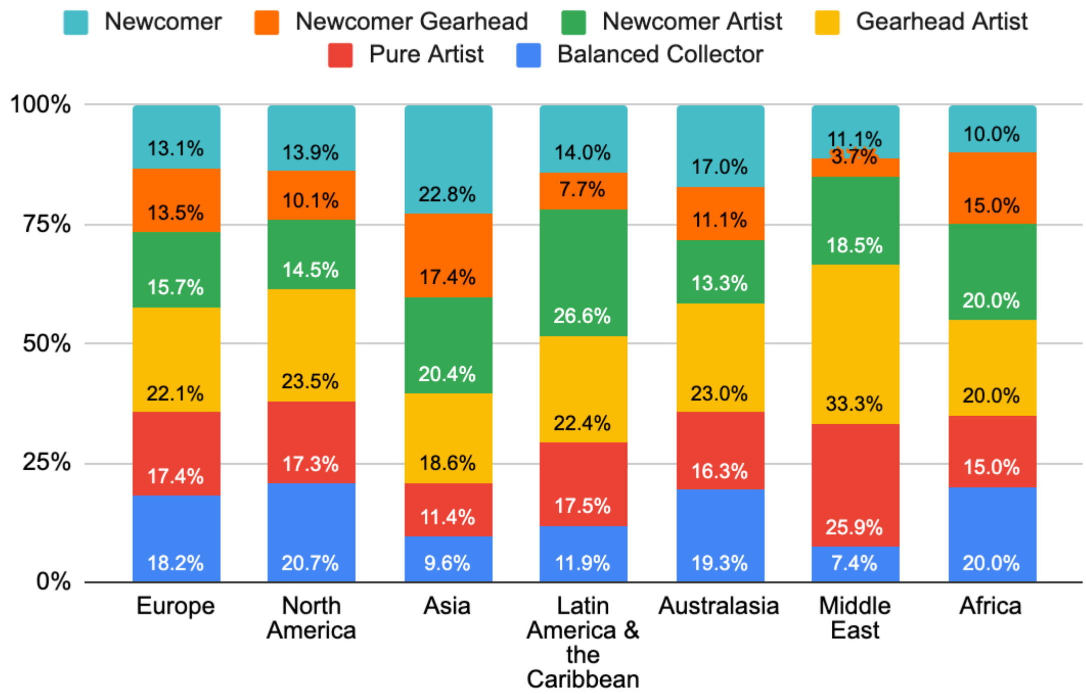

Figure 11. Geographic distribution of segments based on regions (n=3238)

In cross-reference with gender, it is interesting to see a higher proportion of female respondents based in Asia and Latin America & the Caribbean than the rest of the world. The ratio between female and male respondents is around 10% in Europe, North America, and Australasia. However, it slightly increases to about 18% in Asia and Latin America & the Caribbean. (Appendix 4.)

Finally, figure 12 illustrates the number of analog enthusiasts that the respondent knows in person outside the internet within different regions. Accordingly, the majority of the respondents know at least 1 to 4 analog enthusiasts in real life. In comparison, the local film community in Asia and Latin America & the Caribbean are relatively bigger than in Europe, North America, and Australasia with approximately 50% of the respondents having more than 9 analog peers in real life. It is nearly 37% in Europe, North America, and Australasia.

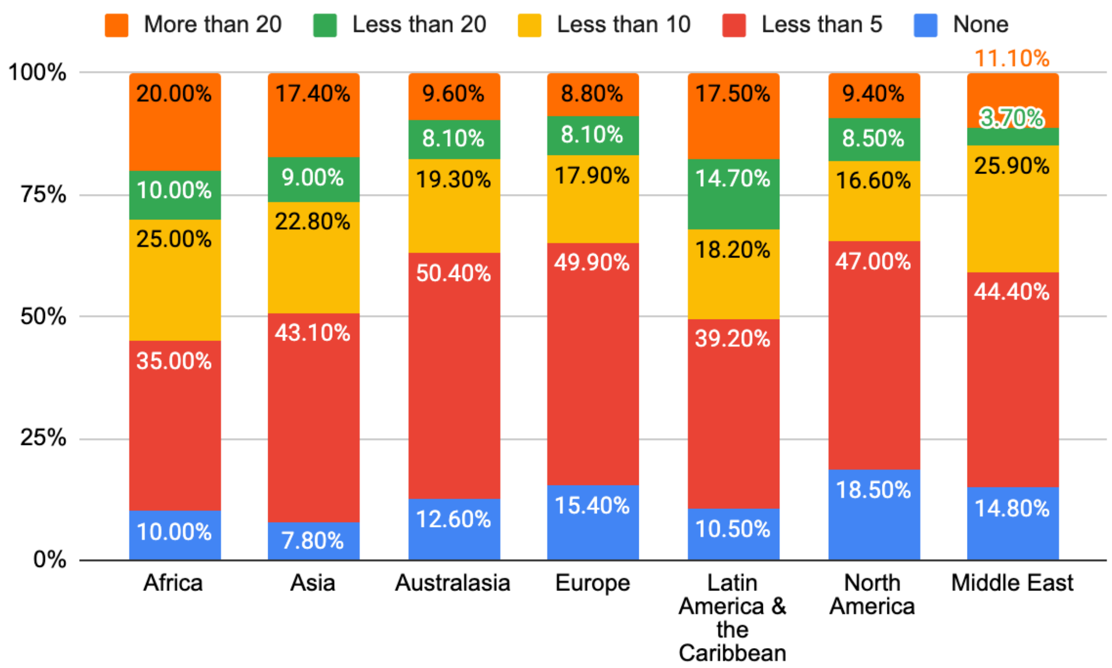

Figure 12. Number of analog peers in real life (n=3238).

5.3. Characteristics of the market segments

The result from the question “How long have you been shooting film?” was analyzed in relation to different segments in figure 13, which shows the amount of experience in analog photography that respondents within each segment have. It is clear that the majority of the Analog Newcomers segment group have practiced film photography for up to 2 years, forming over 50% of the Newcomer and Newcomer Artist and 43% of the Newcomer Gearhead. Almost a third of the Analog Newcomers segment group has 3 to 5 years of experience in film photography. On the contrary, analog enthusiasts with at least 6 years of experience make up 55-63% of the segments in the Analog Professionals group, namely Gearhead Artist, Balanced Collector, and Pure Artist.

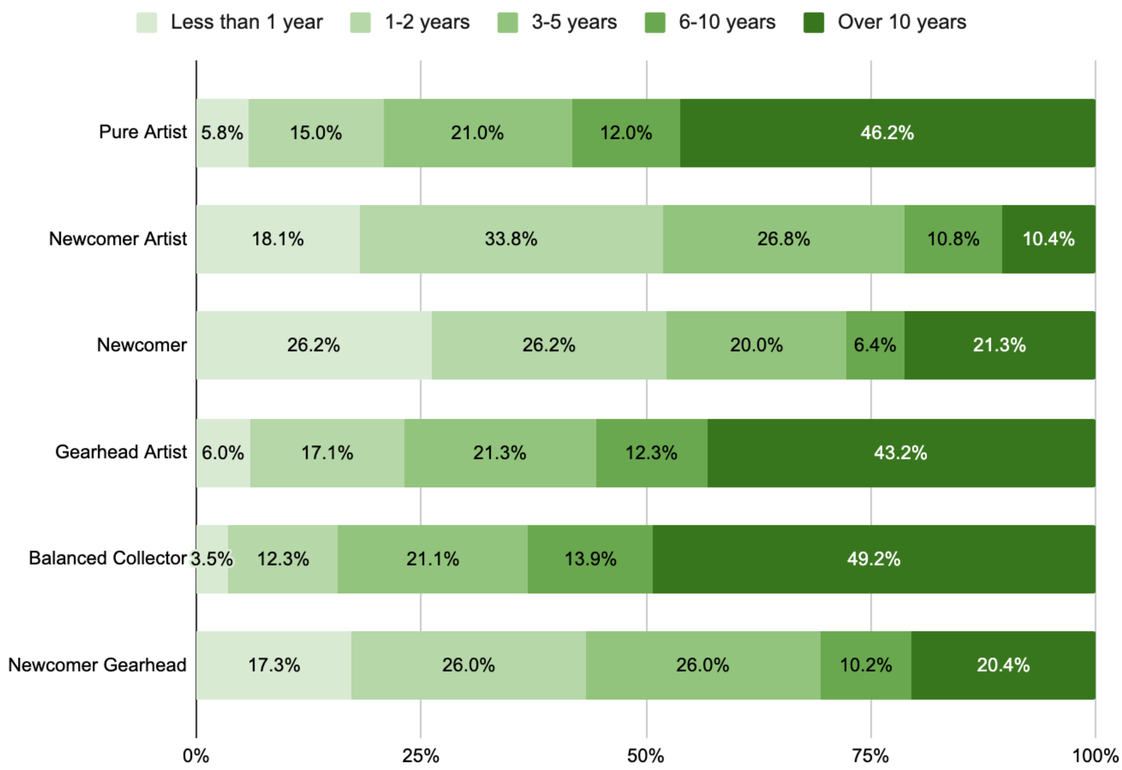

Figure 13. Experience in shooting film (n=3238)

Furthermore, it is interesting that a relatively considerable proportion of approximately 20% of Newcomer and Newcomer Gearhead have shot film for over 10 years. This could be explained in two reasons. First, a segment is identified based on the similarities shared in at least 75% of people within that segment, thus, the minority of the segment that either do not relate to any of the personas in the case of Newcomer or they are just Gearhead as regards to Newcomer Gearhead segment. Secondly, certain people with an always-learning mindset might consider themselves as Newcomers regardless of how long they have shot film. This could explain why some people with over 10-year experience still consider themselves Newcomers.

Figure 14 shows most of the surveyed respondents prefer film over digital. Among them, the artistic group of segments including Pure Artist, Newcomer Artist, and Gearhead Artist prefer film the most in comparison with the other segments 75%. In addition, Pure Artist is the only segment that chooses analog photography as their main medium for taking photographs unless required otherwise. Gearhead Newcomer mostly prefers film to digital cameras but in comparison with other segments, they have more digital camera preferences than other segments with 16% prefer digital over film.

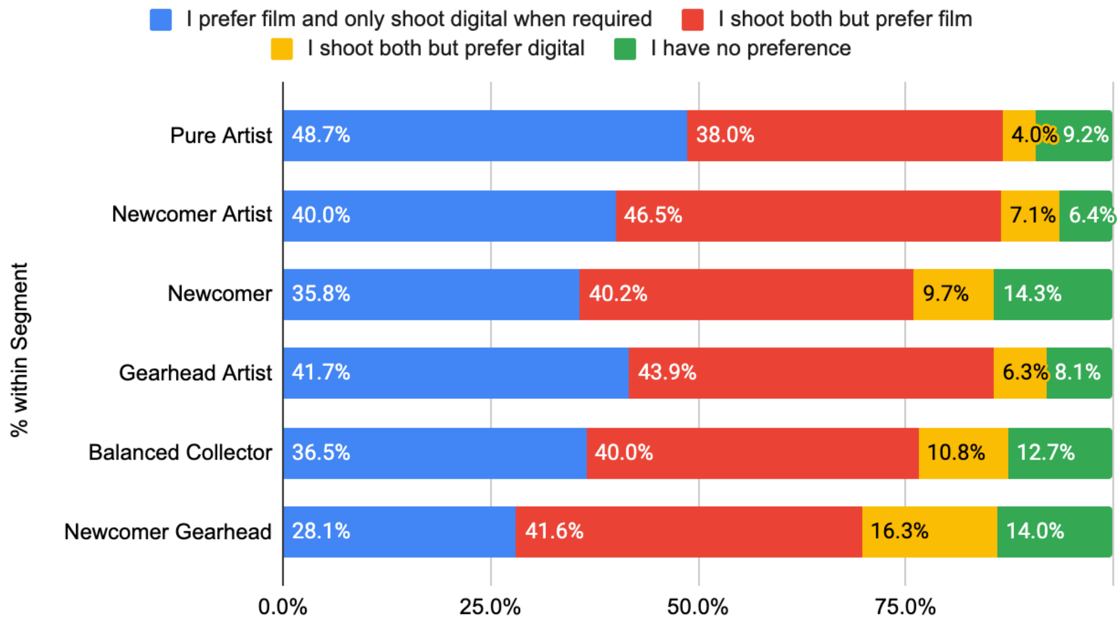

Figure 14. Preference between film and digital cameras (n=3238)

Figure 15 shows the number of analog cameras that a person owns. In general, around 50% of the respondents own 4 to 10 analog cameras. The Newcomer has the least number of film cameras compared to other segments as 43% have a maximum of three analog cameras. Respondents belonging to either Gearhead Artist, Balanced Collector, or Newcomer Gearhead are likely Gearhead, thus generally tend to own more cameras than the others. Particularly, the Balanced Collector has the largest collection of film cameras with 63% possessing over 10 cameras.

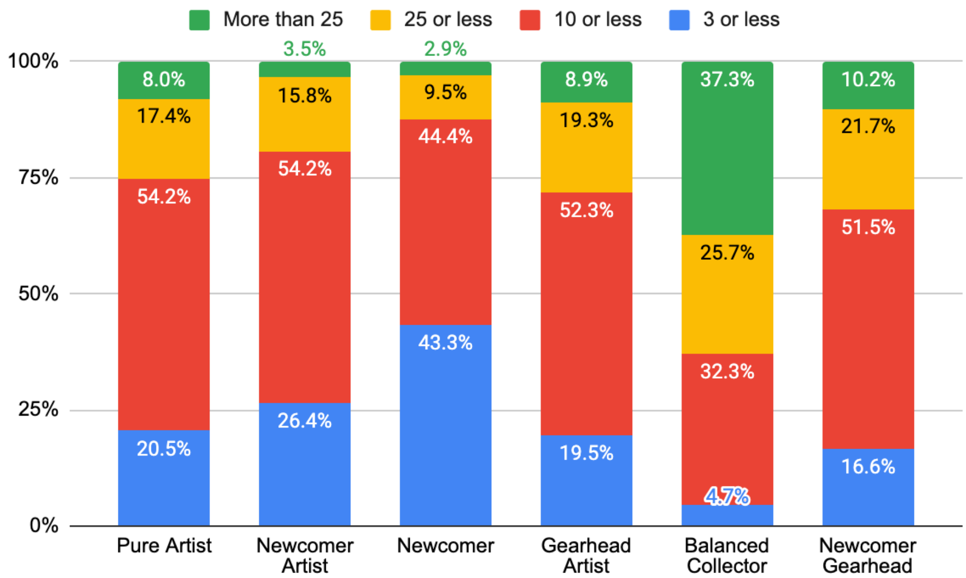

Figure 15. Number of analog cameras owned (n=3238)

Table 7 shows the types of analog camera that a person have in possession. Overall, all respondents share similar answers. In particular, 35mm is the most common film camera owned by 98.2% of all respondents, which is followed by medium format film camera with 74.3% of all respondents. In addition, over half of the surveyed analog enthusiasts possess a compact film camera, which is 14% higher than instant film camera.

Table 7. Analog camera types in possession (n=3238)

	Responses (N)	Percent	Percent of Cases
35mm	3181	30.70%	98.20%
Medium format	2407	23.30%	74.30%
Compact / Point & shoot	1790	17.30%	55.30%
Instant	1355	13.10%	41.80%
Large format	648	6.30%	20.00%
Lomography	582	5.60%	18.00%
Disposable	388	3.70%	12.00%
Total	10351	100.00%	319.70%

In addition, table 8 illustrates the types of analog cameras that each segment prefers by using a heat map in which the darkest blue represents the most favored film camera type. In general, preference for SLR (Single-lens reflex) and rangefinder film camera is shared among all the respondents alike, but SLR is the most favorite film camera. The third and fourth favored film camera types by the Analog Professionals are TLR and compact camera, however, it is the opposite for the Newcomers. Large format, which is the oldest and less common analog camera on the market, is more preferred by the Analog Professionals as the Newcomers opt for instant film camera instead. Folder film camera is the least chosen type for almost all the respondents apart from it is compact film camera. 35mm is the most commonly owned film camera by an analog enthusiast.

Table 8. Preference of analog camera types across different segments (n=3238)

		Balanced Collector	Pure Artist	Gearhead Artist	Newcomer Artist	Newcomer Gearhead	Newcomer
Count	SLR	483	442	604	450	325	379
% within Segment		81.60%	80.10%	82.90%	86.90%	82.90%	83.30%
Count	Rangefinder	371	251	399	228	223	173
% within Segment		62.70%	45.50%	54.70%	44.00%	56.90%	38.00%
Count	TLR	224	189	216	142	94	86
% within Segment		**37.80%**	**34.20%**	**29.60%**	***27.40%***	***24.00%***	***18.90%***
Count	Compact / Point &	158	148	160	178	105	137
% within Segment		***26.70%***	***26.80%***	***21.90%***	**34.40%**	**26.80%**	**30.10%**
Count	Large format	105	114	133	38	22	38
% within Segment		**17.70%**	**20.70%**	**18.20%**	*7.30%*	5.60%	*8.40%*
Count	Instant	92	93	69	90	36	59
% within Segment		*15.50%*	*16.80%*	*9.50%*	**17.40%**	**9.20%**	**13.00%**
Count	Folder	79	45	54	21	29	20
% within Segment		13.30%	8.20%	7.40%	4.10%	*7.40%*	4.40%
Count	Total	592	552	729	518	392	455

!Percentages and totals are based on respondents.

Question “How often do you shoot film?” was analyzed in figure 16, indicating that 50-60% of the respondents regardless of segments use their analog cameras every week. Roughly 25-30% shoot film monthly and the Artist-oriented segments are more likely to practice film photography everyday than other segments. The film cameras are used only once a year mostly by Balanced Collector because some Collector enjoys collecting analog cameras rather than using them.

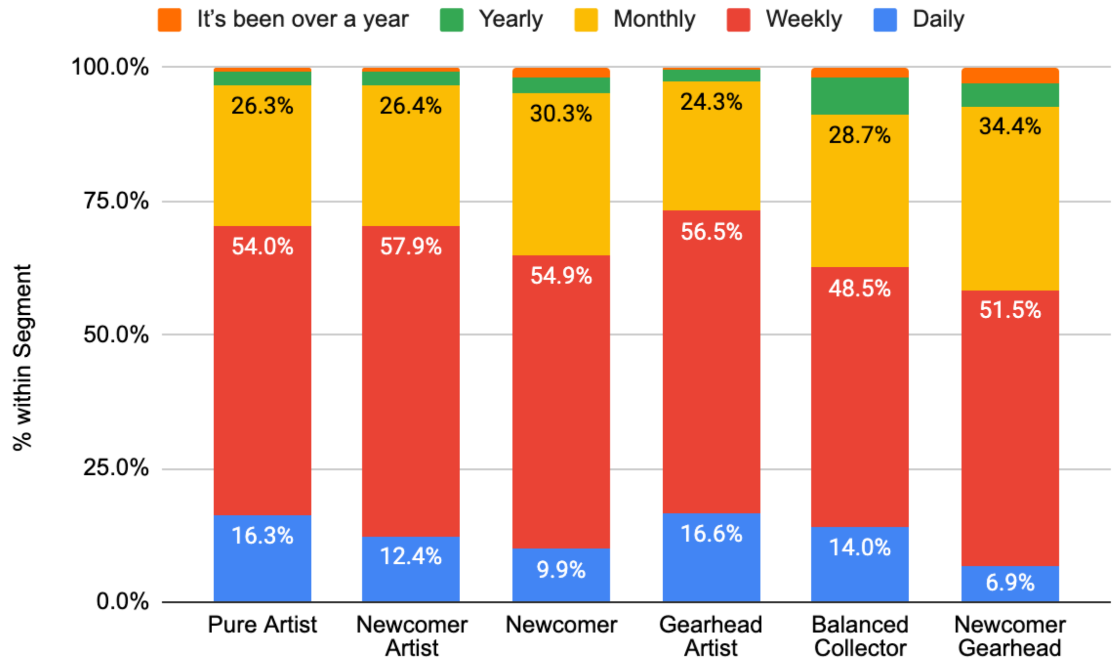

Figure 16. Frequency in using analog cameras (n=3238)

Question “From your last 5 camera purchases, how many times did you have problems with the camera(s)?” revealed that the chance of buying a film camera that does not function properly or smoothly is relatively high. At least 59% of all respondents have one or more camera-related issues. This indicates that out of 10 analog camera purchases, there is a high chance that 6 of them have some type of issue. Among six segments, Newcomer Artist and Newcomer Gearhead are most likely to have problems with their camera, while Newcomer has the least of the issues. In addition, Pure Artist, Gearhead Artist, and Balanced Collector have a similar number of issues. (Figure 17.)

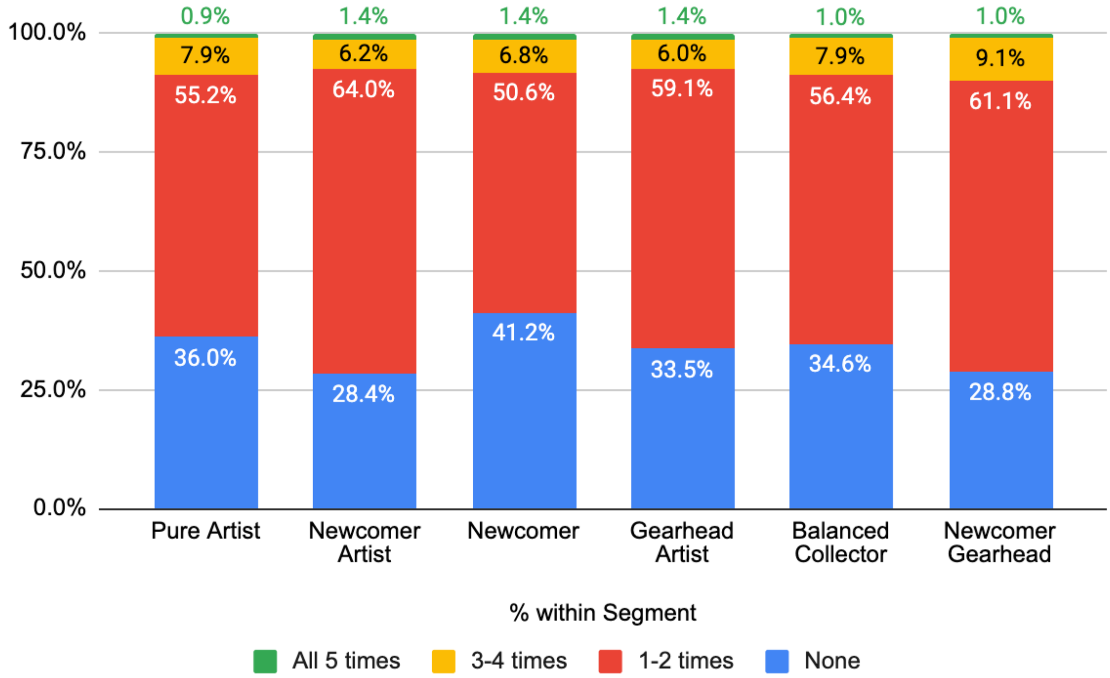

Figure 17. Issues with the analog camera in the last 5 purchases (n=3181)

Question “The last time I looked for a specific piece of gear was for of….” aims to give more insights into the intention of a person when researching for a specific analog gear (Figure 18). It is obvious that professional use and entertainment of fun are the two major motivations for all segments to search for analog gear. For Gearhead Artist and Pure Artist, they mostly research for analog gear because of their own professional use more than just for fun with 49.8% and 57.2% of all respondents respectively. This also shows relatively strong buying intention for analog gear by Gearhead Artist and Pure Artist. On the contrary, Newcomer and Newcomer Artist research for gear just for fun or entertainment more than their professional use. While entertainment and fun is the main reason for Newcomer Gearhead to look for gear with over 55% of the respondents choosing this answer, which doubles the purpose of professional use. At the same time, Pure Artist researches for entertainment relatively less than other segments, therefore, they are not as fascinated by analog gear as the other segments. Balanced Gearhead looks for information about analog gear equally for professional use and entertainment. In addition, Balanced Gearhead and Newcomer Gearhead are more likely to look for a gear due to its rareness. Other reasons to search for a gear only take up to nearly 6% of all the respondents, while very few people find a gear due to a trend or social reasons.

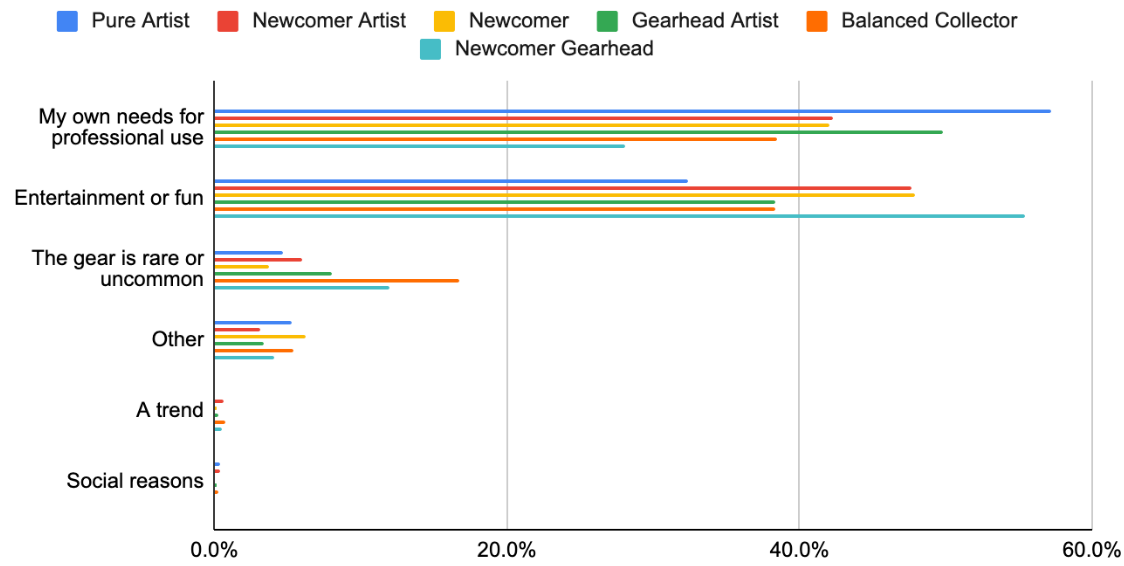

Figure 18. Main purposes for researching for gear (n=3238)

Question “When buying a camera, I follow the advice of…” was asked to find out how much users of analog cameras trust world-of-mouth in comparison with salesperson (Figure 19). It was discovered that reviews are trusted the most by 75-89% of all respondents, particularly among the Analog Newcomers segment group. Friends and magazines or books play a much smaller role with in influencing consumer choice at an average of 13% and 4% respectively. Moreover, salespeople and sellers are the least credible source of advise.

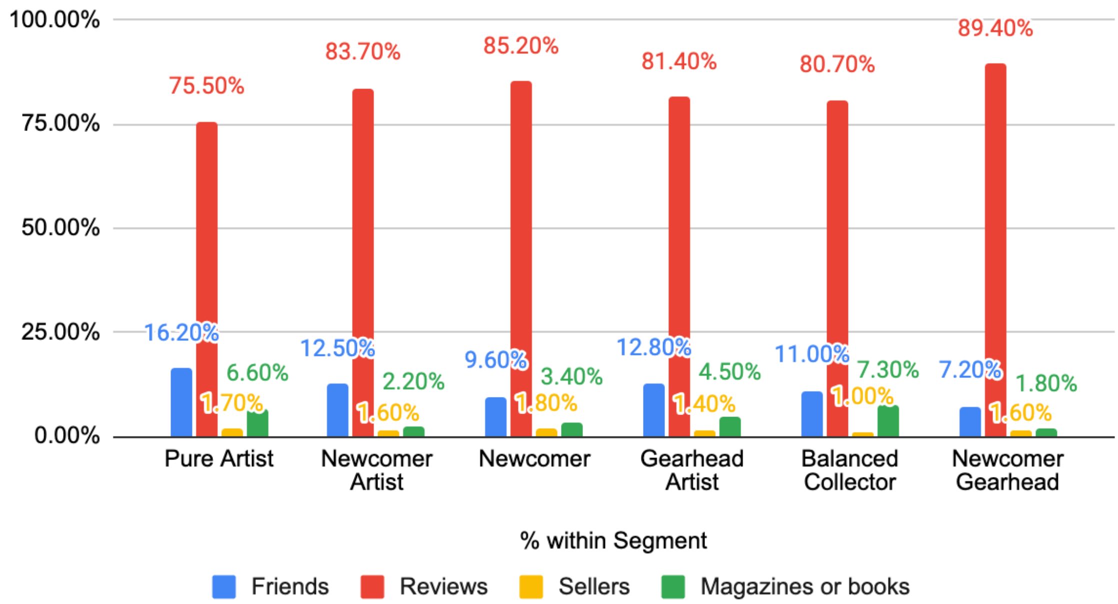

Figure 19. Sources of advices when buying analog cameras (n=3182)

Question “Please rank the importance of the following factors when you choose a film camera gear to buy” aims to find out the level of importance of different factors when buying analog gear. According to figure 20, there is no significant difference among the segments considering the importance of these factors. The most important element to consider is the condition of the gear, which is followed by price, result image from the gear, trustworthiness of the sellers. In addition, it is notable that the respondents generally value warranty over return service.

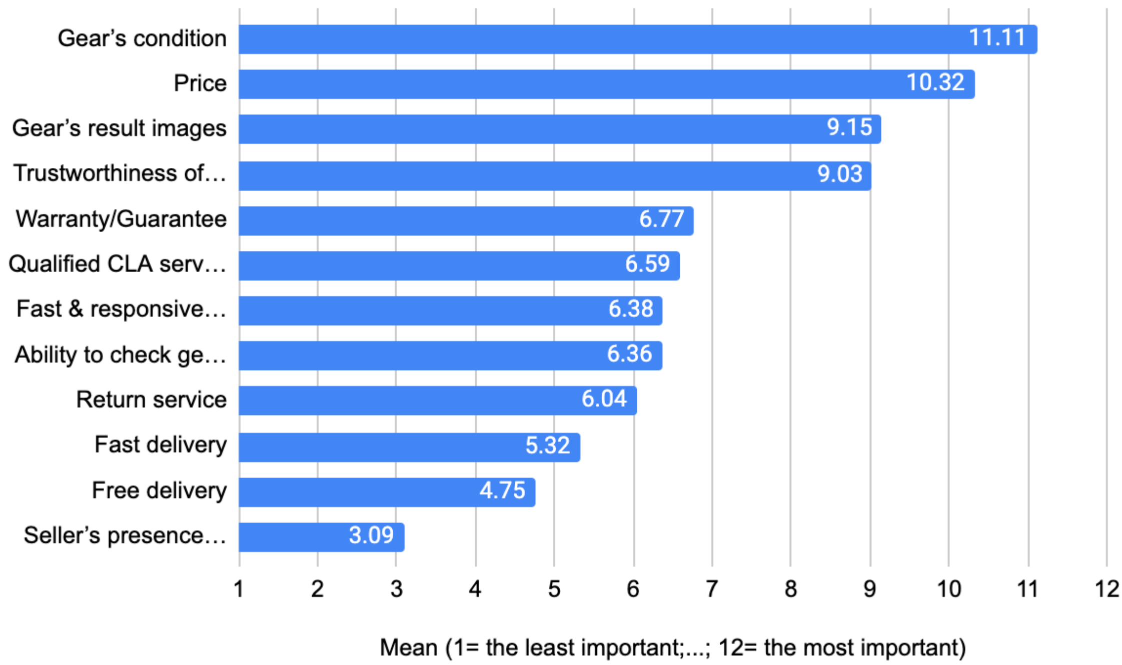

Figure 20. Importance of different factors when buying analog gear (n=3238)

Question “When I can't choose a film camera gear to buy, I will delay to….” gives insights into the decision-making process of potential analog camera buyers. Generally, when facing a difficult set of options, people are most likely to wait for sales and/or clarify their need and goals. Thus, it confirmed once more that all the respondents are price sensitive, thus, they are likely to make a buying decision if there is a promotional campaign. In addition, the respondents tend to resolve their confusion by themselves first by seeking more information and narrowing the set of options before asking for advice from others. (Figure 21.) When compare between generations, it is noticeable that the younger generations including GenZ and Millenials are more proactive in researching for information and resolving their confusion. Whereas older generations such as GenX and Boomers are more inclined to abandon the problem. (Appendix 5.)

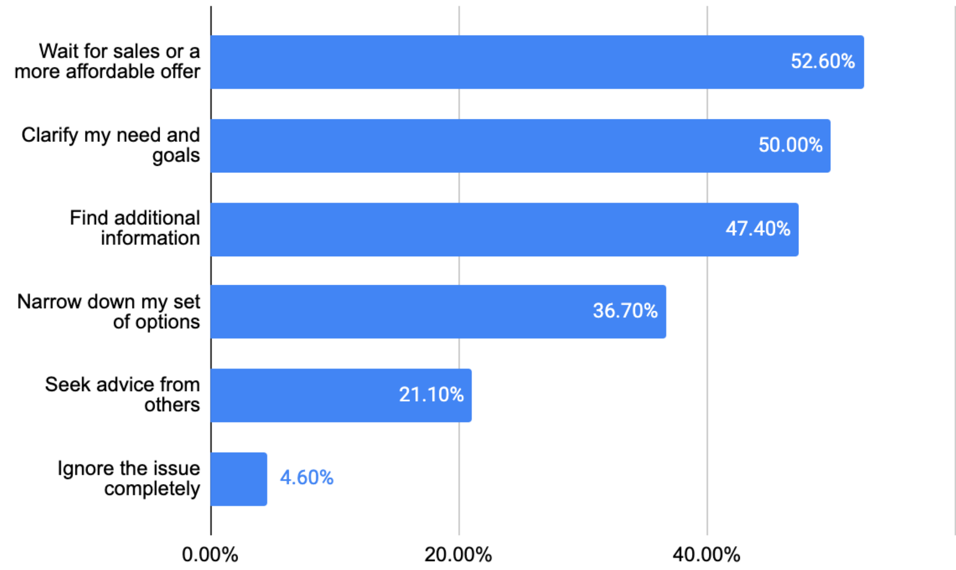

Figure 21. Actions taken when being unable to choose a film camera (n=3182).

5.4. Attractiveness of market segments

Question “In 5 years, I think my use of film will…” provides the overall attitude towards shooting film in the next five years. Based on figure 22, approximately half of the respondents said that their use of film would increase and around 40% agreed that it would stay the same as regards the Analog Professionals and Newcomer Gearhead. Whereas Newcomer and Newcomer Artists are more likely to increase their practice of film photography. Hence, the future outlook for film photography is quite bright due to the generally positive attitude towards usage of analog cameras among all respondents despite some following setbacks shown in table 9.

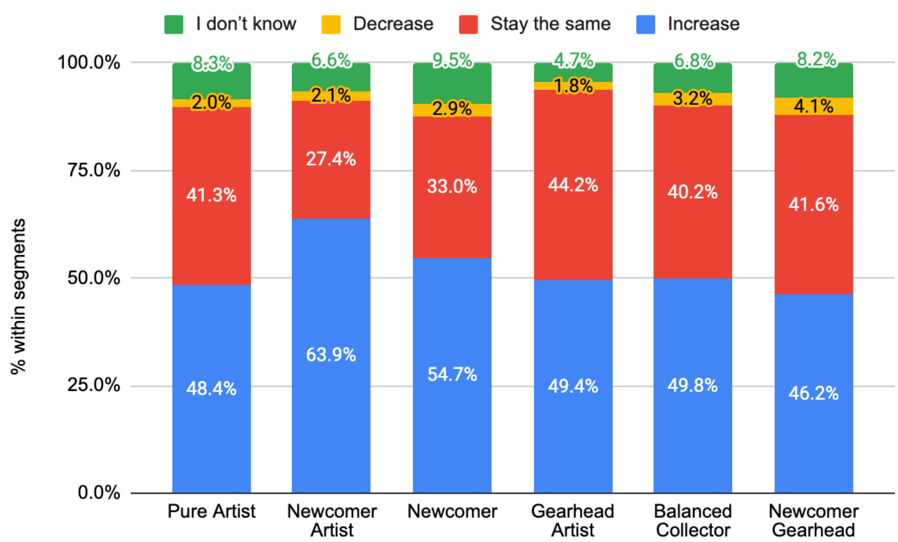

Figure 22. Attitude towards use of analog cameras in the next 5 year (n=3238)

As regards to the challenges for shooting film, the overall effort required for analog photography is the least of an issue for all respondents. The highest obstacles for all respondents are the price of film and lab services. This is a considerable issue for many analog lovers as major manufacturers of photographic films such as Kodak and Fujifilm have both increased the selling price for their film stocks this year. In addition, the availability of qualified repair/CLA services is another difficulty, followed by the limited availability of film stocks. Moreover, 26.5% of all respondents consider availability of stores selling adequate equipment as a challenge. Interestingly, in comparison with geographic regions, availability of shops with adequate analog photography equipment is a problem to almost 50% of the respondents based in Latin America & the Caribbean. Thus, the need for stores selling diverse range of analog photography equipment is relatively high in **Latin America & the Caribbean,** which could propose as a potential market for Kamerastore (Appendix 6).

Table 9. Obstacles for shooting film (n=3116)

	Responses (N)	Percent	**Percent of Cases**
Price of film	1951	25.60%	**62.60%**
Price of Lab services	1491	19.50%	**47.80%**
Availability of qualified CLA/repair services	1266	16.60%	**40.60%**
Availability of film	942	12.30%	**30.20%**
Availability of stores selling adequate equipment	825	10.80%	**26.50%**
Price of gear	679	8.90%	**21.80%**
The overall effort needed	474	6.20%	**15.20%**
Total	7628	100.00%	**244.80%**

In terms of the choice of shopping channels for film cameras, eBay or similar online market place such as Amazon is the leading shopping channel for film cameras among the majority of respondents (76.8%), which is followed by local physical stores, professional online retailers, flea markets, online hobbyist groups, online local classifieds, social stores, and online store of film camera brands. Only 1.7% of respondents have never bought any film cameras before and the minority (8%) buy analog gear from online stores of film camera brands such as Leica, Nikon, Lomography, etc. (Appendix 7.)

Overall, the choice of shopping channels slightly varies among different segments based on persona types (Appendix 8). However, except for eBay or similar online marketplace which remains to be the most popular place to buy analog gear, there is a clearer distinction in the choices of online shopping channels among regions and generations.

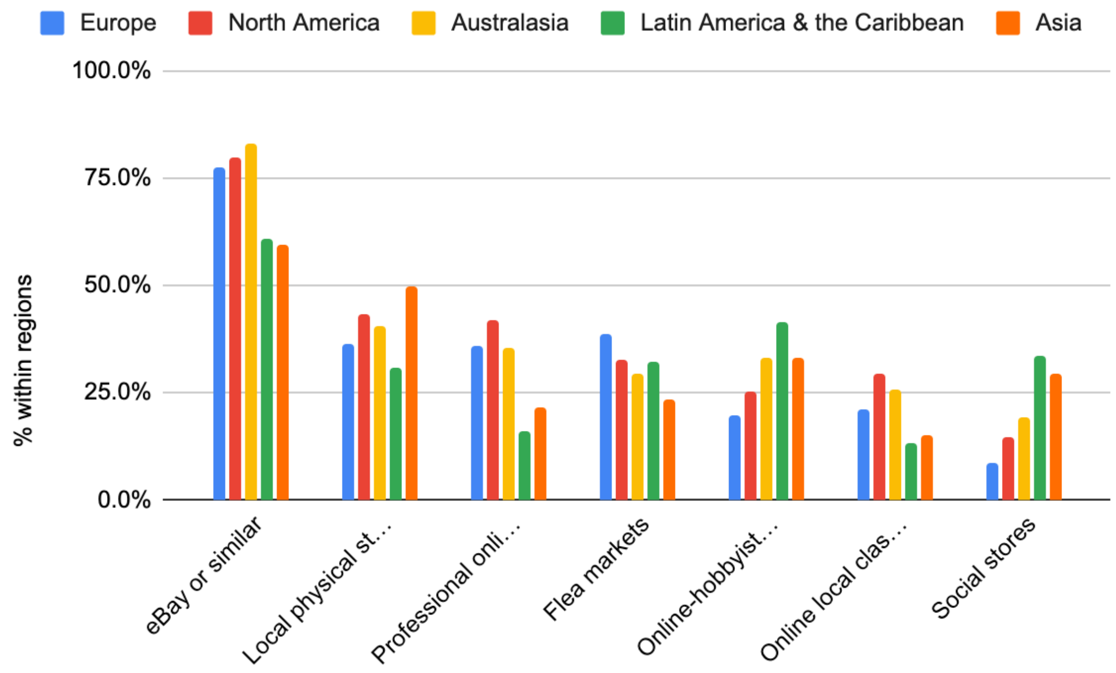

Figure 23. Choice of shopping channels among regions (n=3237)

In terms of geographic areas regarding Europe, North America, and Australasia, eBay or other similar marketplace is the primary shopping channel (over 75%). After that, flea markets, local physical stores, and professional online retailers are somewhat evenly seen as the second places to check for film cameras. In addition, online local classifieds such as Craiglist is also used quite often in North America (over 25%) while online hobbyist groups (forums, Facebook, etc.) are slightly more popular than flea markets in Australasia. On the contrary, analog enthusiasts based in Asia and Latin America & the Caribbean show different choices regarding where they look for film cameras. Although eBay or similar marketplace maintain as the first place to buy analog gear, they are less significant (around 60%). Online hobbyist groups is the second shopping channel in Latin America & the Caribbean (41.3%), followed by social stores (Facebook, Instagram, etc.), flea markets, and local physical stores. Whereas half of the analog camera users in Asia go to local physical store to buy film cameras. Besides, they also look for analog gear on online hobbyist groups and social stores, though not as much as those in Latin America & the Caribbean. (Figure 23.)

As regards to generations, eBay or similar is generally the most popular channel to shop for film cameras but GenZ (72.6%) surprisingly use eBay slightly less than other generations (over 75%). For GenZ and Millennials, local physical stores and flea markets are equally common places to buy analog gear (35-40%). However, professional online store is particularly more popular among older generations (Boomers & GenX) than younger generations (Millennials & GenZ). Whereas younger people hunt for film cameras in flea markets more than those who are over 38 years old. In addition, they also buy more from other online channels such as online hobbyist groups, local classifieds, and social store. (Figure 24.)

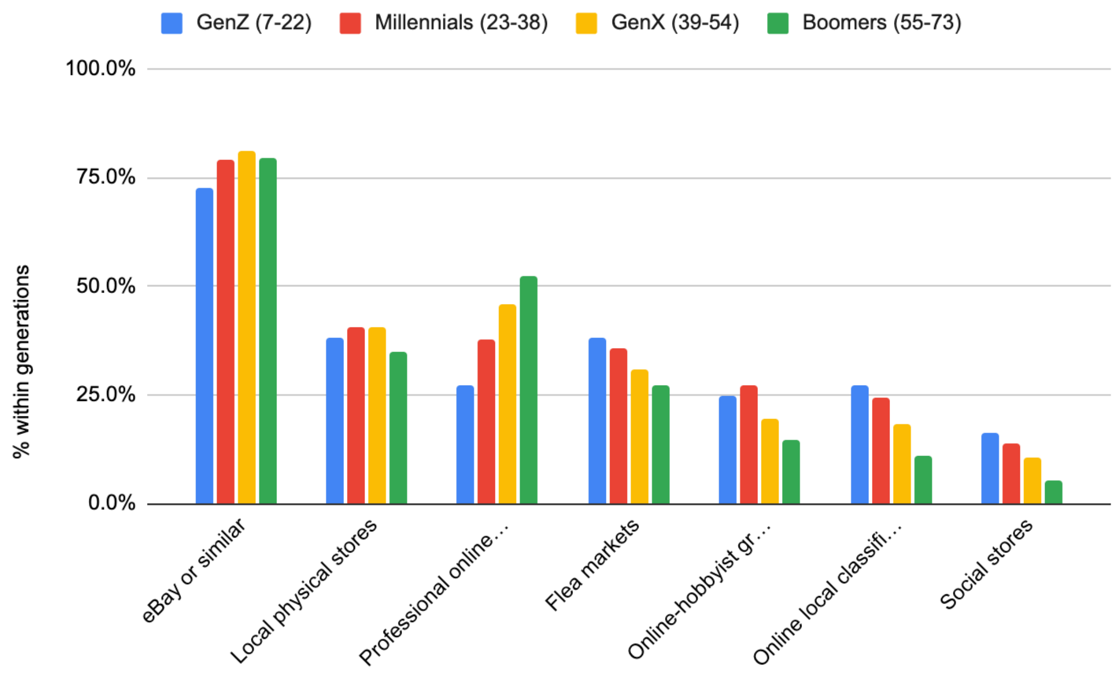

Figure 24. Choice of shopping channels among generations (n=3237)

Regarding online shopping frequency for analog gear, 3.6% of all respondents have never done any online purchase of film cameras (Appendix 9). It is expected that the respondents who associate with Gearhead persona are the most frequent shoppers of analog gear online. The result from question "I buy film camera gear online…" confirmed this as 42-58% of the Gearhead-oriented segments buy film gear at least every few months. Particularly, Balanced Collector shops for analog gear online the most while Pure Artist and Newcomer are the most to never or rarely buy online (over 30%) (Figure 25). However, the remaining segments form 47.1% of all respondents, thus they still make up a substantial group of buyers for analog gear online.

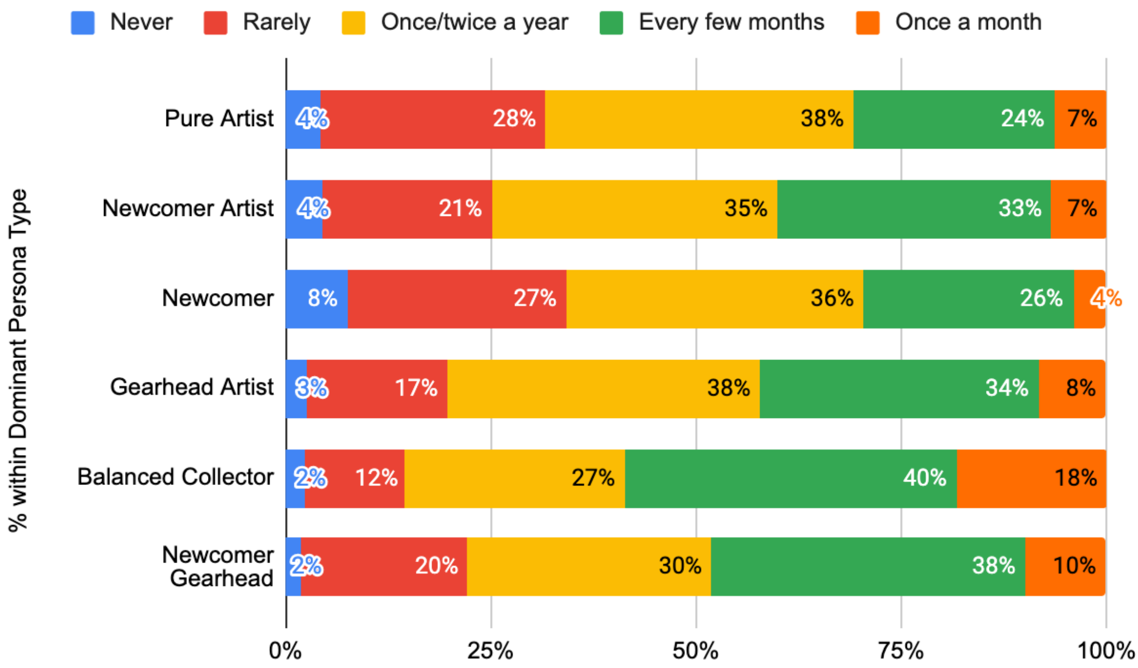

Figure 25. Online shopping frequency for analog gear (n=3182)

As seen in figure 26 which illustrates the tendency of buying or bidding for checked gear versus unchecked gear online, all respondents are more inclined to purchase analog gear that have been examined and/or serviced by trusted sellers or stores. In addition, they are all somewhat likely to bid for checked gear on eBay or similar marketplaces, especially the Balanced Collector. All respondents except for the Balanced Collector are unlikely to buy or bid for untested analog gear.

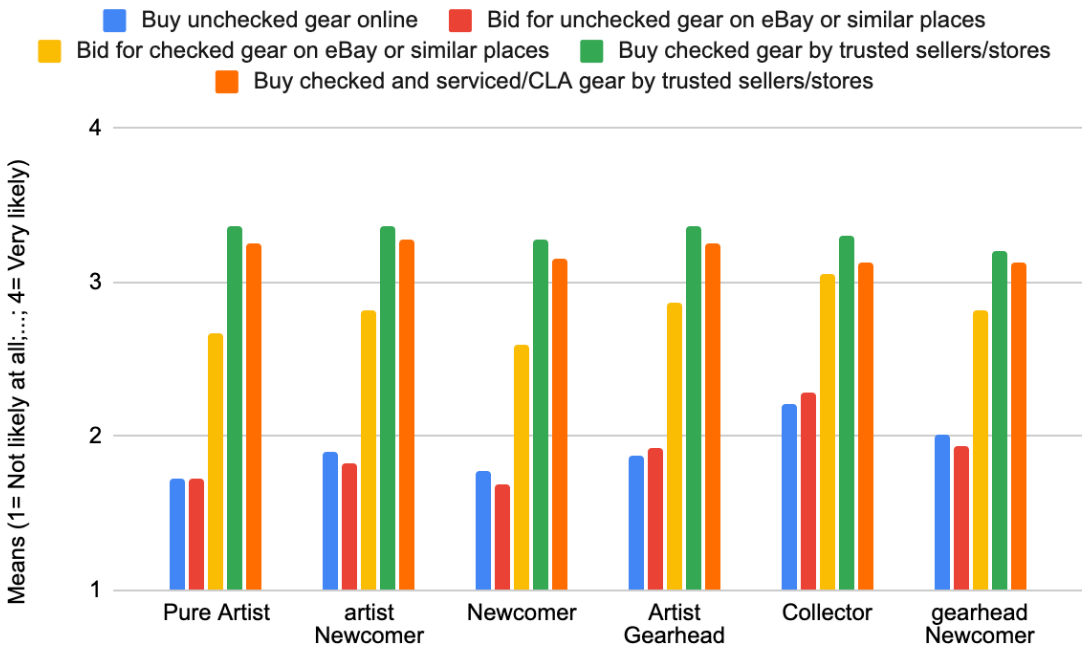

Figure 26. Tendency to buy unchecked gear vs checked gear (n=)

In terms of obstacles from shopping online, available information on conditions of analog gear and credibility of sellers or stores are evenly the two most important elements for not online shopping (75.7%) (Appendix 10), which are the same factors considered as the most important when buying analog gear in figure . Moreover, shipping cost is the third reason for not shopping online (28.1%), while delivery speed is the least of the concerns (8%). Additionally, lack of warranty (24.8%) is also perceived as an obstacle even more than return policy (21.6%) (Appendix 10.) Payment safety also prevents analog consumers from buying online, especially in Europe, Asia, and Latin America & the Caribbean (Figure 27). VAT, customs, and duty are relatively considered as another risk around the world except for North America. It is noticeable that analog consumers based in Asia and Latin America & the Caribbean value trustworthiness of sellers more than the gear condition. They are also concerned about shipping cost and warranty more than the rest of the world.

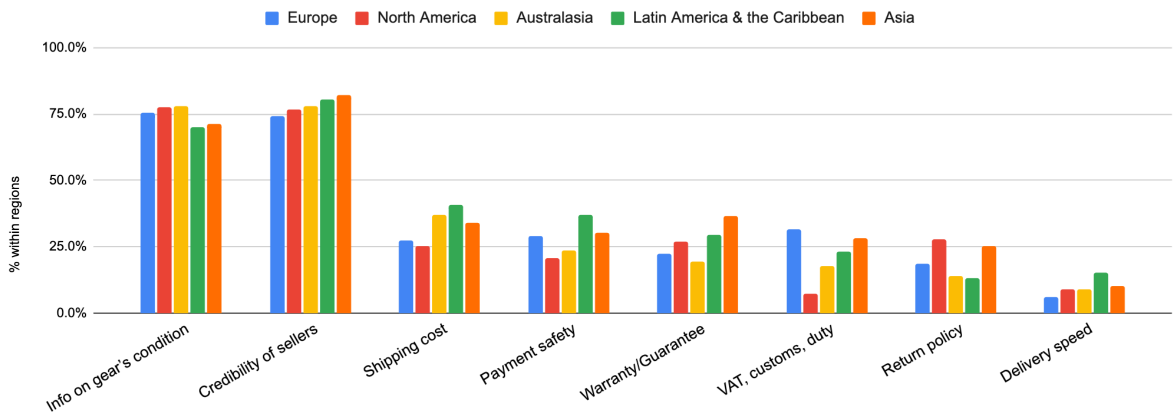

Figure 27. Obstacles from shopping online for analog gear within regions (n=3238)

5.5. Suitable digital marketing channels for the approach of potential market segments

Overall, the analog community is strongly present on Instagram as 86% of all respondents share their film photos on this platform. On the contrary, Tumblr is the least used channel for sharing film photos, accounting for only 2.9% of all answers, hence being excluded from detail analysis as an insignificant social media platform. (Appendix 11). Besides, as the differences among different segments in their preferences of online channels for sharing photos are minor (Appendix 12), other perspectives such as regions and generations are employed for more detail analysis.

Based on geographic regions from figure 28, it is noticeable that instagram is the major platform for analog enthusiasts to share photos with others and it is used the most in Latin America & the Caribbean (95.2%) and Asia (90.4%). Facebook is also commonly used by more than 25% of all respondents, among which it is most popular in Asia (36.5%). People living in North America are more likely to use Flickr and Reddit for sharing their photos than the rest of the world. Whereas blogposts are more favored in Europe and Australasia. In addition, forums are used evenly by everyone regardless of their locations.

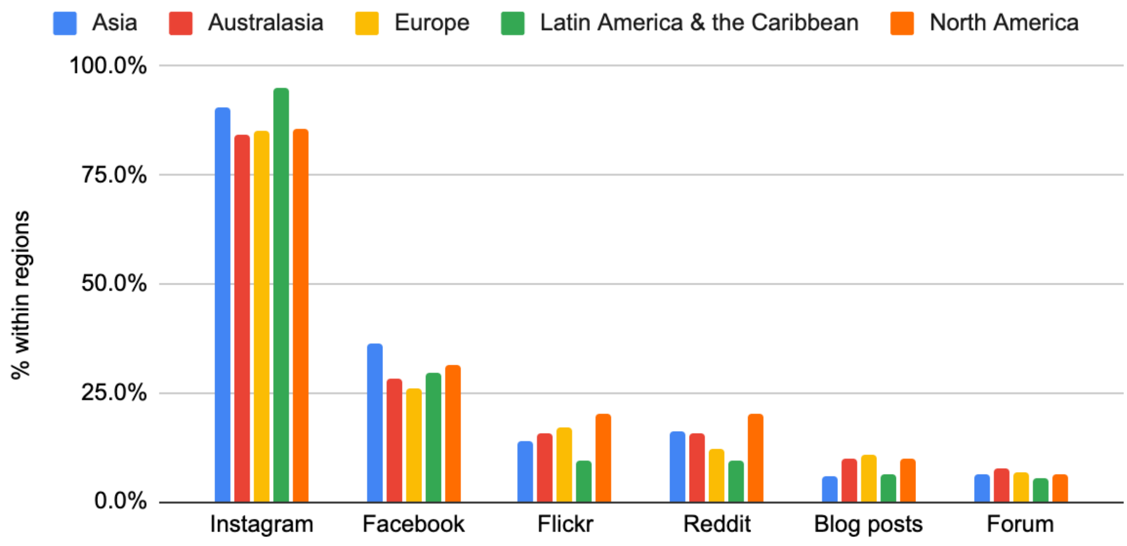

Figure 28. Online channels for sharing photos among regions (n=2692)

In terms of generations, obvious distinction in the preferences of online channels for sharing photos can be seen. According to figure 29, Instagram is the primary channels for posting photos, particularly for younger generations such as GenZ (94.9%) and Millennials (89.8%). It is still the most common online platform for GenX (65.9%) to share their photos but not as significant. On the other hand, Facebook and Flickr are much preferred by older generations, specifically GenX (50.6% and 32.9%) and Boomers (50.3% and 35.9%). While Millennials choose Facebook as their second platform to post photos online (31,8%), GenZ favor Reddit instead (25.5%). Though playing the least important role, forums are still being used by GenX (11.8%) and Boomers (17.6%) but very little by those younger than 39 years of age. In addition, over 10% of Millennials, GenX, and Boomers evenly invest in blogposts for sharing their gallery, however, it is much less adopted by GenZ (5.5%).

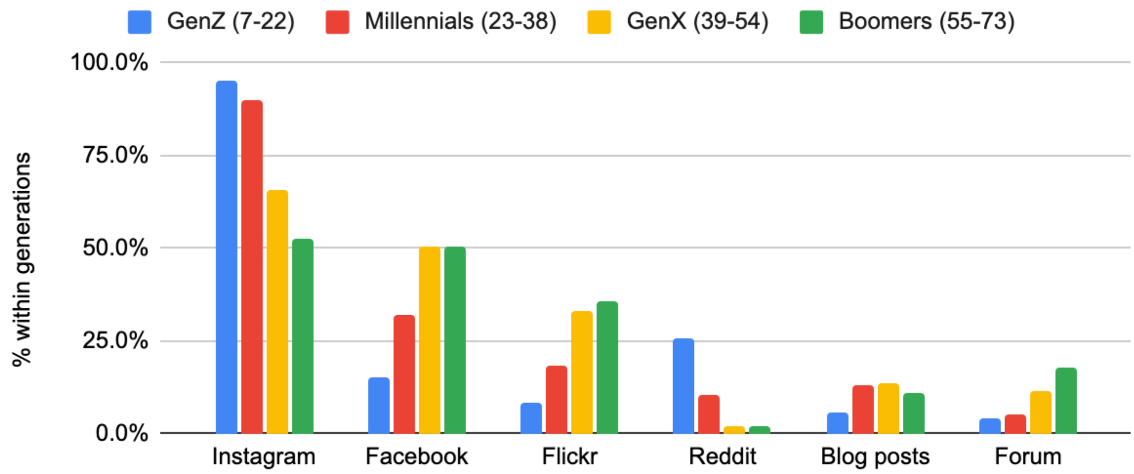

Figure 29. Online channels for sharing photos among generations (n=2692)

As regards to the types of analog photography content, analog enthusiasts mostly look for inspiration from film photographs, photo essays by other film photographers, and so on (68.4% of all respondents). 57% also like to read or watch reviews and comparisons on mainly analog gear. Contest is the least being searched for, taking up only 5.5% of all answers since there is very few contests made specifically for analog photography. (Appendix 13.) In addition, younger people are overall likes to spend more time on different contents related to analog photography such as inspiration, reviews and comparisons, tutorials or tips, research on analog photography styles, entertainment, and vlogs than older counterparts. All respondents regardless of age engage in discussions, gear repair, and news evenly. In addition, GenZ, Millenials, and GenX are more interested in interviews than Boomers. (Appendix 14.)

When comparing between different segments, it can be seen from figure 30 that the Pure Artists and Newcomer Artists pay more attention to the image creation of film photography than the others since they mostly search for inspiration (68.8% and 74.1%) and research on certain photography style(s) (48.9% and 58.1%). Over 40% of Pure Artists also spend time on reading reviews, comparisons, or tutorials and tips, but it is much less than those in other segments such as Newcomer Artists (over 60%). On the contrary, Newcomer Gearhead and Balanced Collector are less interested in finding inspiration for their film photographs (60.6% and 64.5%) compared to other segments and search for gear repair the most among all segments. Newcomers segment group is generally look for tutorials and tips as well as vlogs more than the rest.

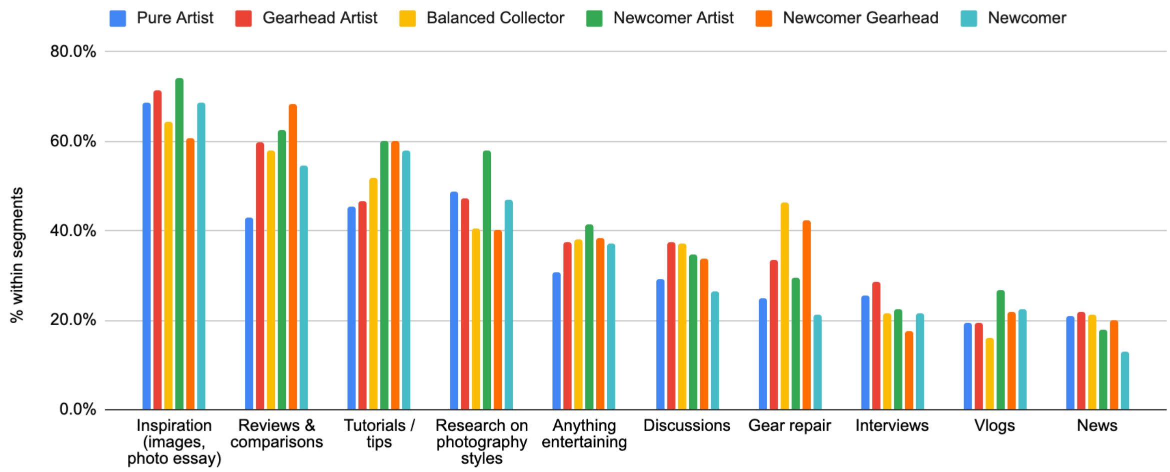

Figure 30. Preference of film photography contents among segments (n=3237)

Regarding the preferences of different content formats, it is presumed that analog enthusiasts would like content in image format the most based on the above analysis of film photography content and online channels. However, it turns out to be the opposite as analog consumers generally tend to see content in video more than in image. In particular, Newcomer Artist and Newcomer Gearhead favor video the most (79.7% and 74.2% respectively), which is followed by imagery and article. On the contrary, Gearhead Artist and Balanced Collector prefer articles (705% and 69.1% respectively) over video and image. Moreover, Pure Artists like video and articles on different topics evenly and slightly more than solely images taken by film cameras. While Newcomers like video the most and prefer photos relatively more than articles. (Figure 31.) In addition, audio format is the least favored format of content, chosen by a minority of respondents (17.4%) (Appendix 15).

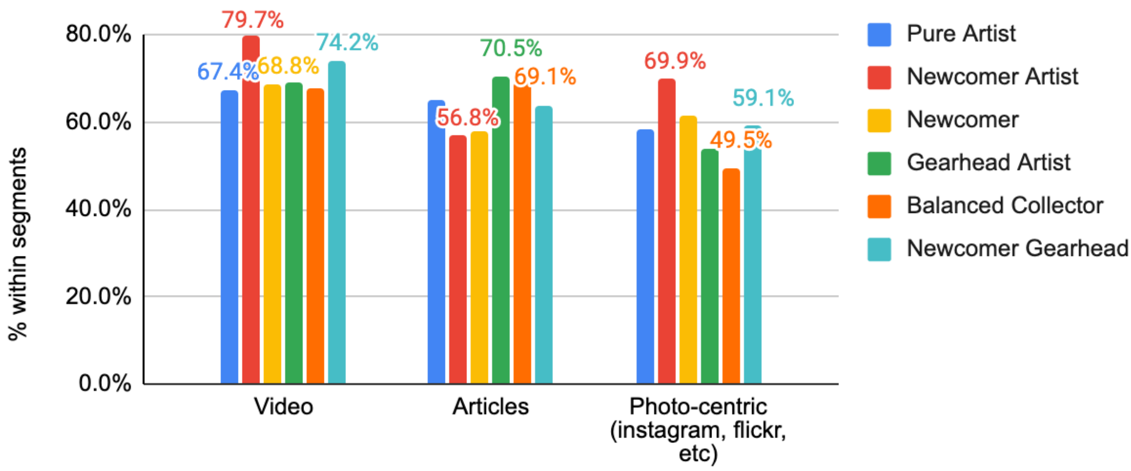

Figure 31. Preference of content formats (n=3237)

According to geographic regions, video is the most consumed type of content in Latin America & the Caribbean, Europe, and North America. Whereas articles are the most popular among those living in Australasia and video and photos are evenly the most preferred in Asia. (Appendix 16.) Furthermore, the younger the analog camera users are, the more they prefer to see content in image and videos and the less they read articles about film photography (Appendix 17).

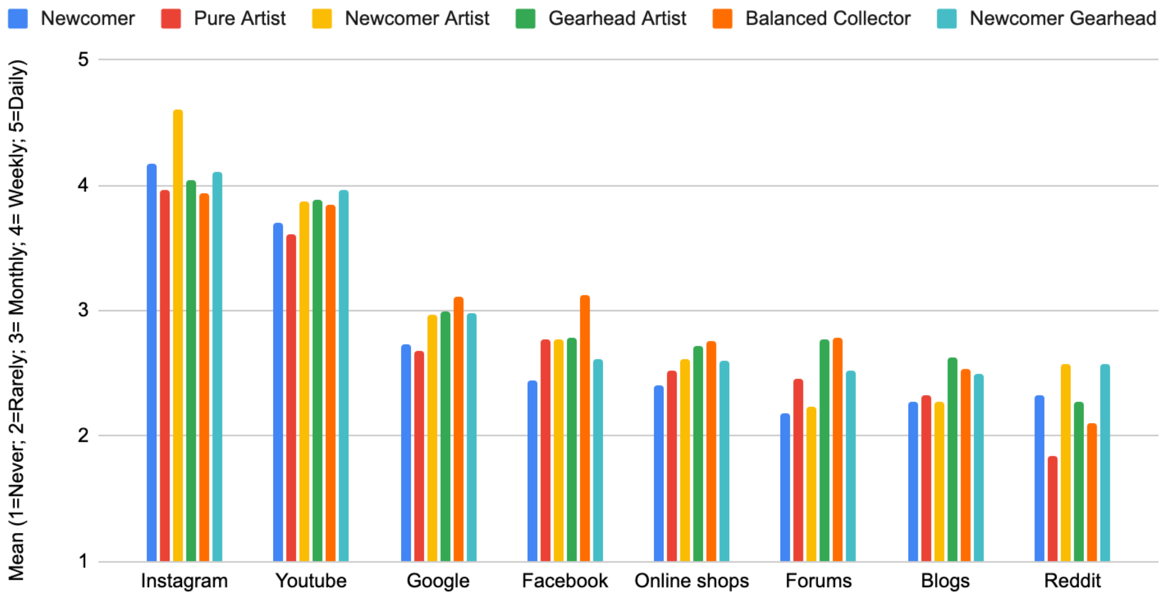

Figure 32. Usage frequency of different online channels among segments (n=3237)

As regards to the online channels where analog enthusiasts look for film photography content, Instagram remains as the primary platform which is used at least every week on the average (Mean=4.1 on the scale from 1 to 5). According to figure 32, the Analog Newcomers are seen to be the most frequent users of Instagram among which Newcomer Artist uses the platform almost daily (Mean=4.61). In addition, Youtube plays an important role as the second most common platform to look for relevant film photography content (Mean=3.81). Besides, respondents also use Google at least every month (Mean=2.92) to search for specific questions or content related to analog photography. Moreover, Youtube and Google are used relatively less by Pure Artist and Newcomer. Facebook has a less significant usage (Mean=2.77) but still very important for Balanced Collector (Mean=3.12) based on figure 32. At the same time, analog enthusiasts generally surf through the product catalogue of online shops almost every month (Mean=2.6). Furthermore, the Gearhead-oriented who belong to either Balanced Collector, Gearhead Artist, or Newcomer Gearhead tend to visit forums and blogs more than other; whereas reddit has a rather larger Newcomers audience (figure 32). All the data can be found in Appendix 18, 19.

When comparing among different generations, Instagram, Youtube, and reddit have a gradually younger audience base of analog enthusiasts. Reddit is proven again to have young analog enthusiasts under 23 years old as their primary audience. While older generations are typically more present in Facebook, online shops, forums, and blogs more than young generations. (Appendix 20.)

6. Discussion, suggestions, and assessment

This chapter commences with a discussion on the key findings drawn from the result analysis in chapter 5. Furthermore, the researcher also acknowledges the limitation of the research and give suggestions for future research. Additionally, personal reflection on the research will be briefly discussed to conclude the thesis study.

6.1. Discussion of key findings

This research study aims to get insights into the research question “How to distinguish and attract consumers of potential market segments with appropriate digital marketing communications?”. To answer this, different aspects of the question have been addressed separately in the theoretical framework and data analysis of the survey. The following subchapters will discuss the results in-depth to give a comprehensive understanding of the research question, specifically the market segments, their characteristics and attractiveness for Kamerastore, as well as the effective elements of digital marketing communications to attract these potential segments.

6.1.1. Changes in market segments between 2017 and 2020

The outcomes from the analysis of surveyed database revealed certain changes to the market segments from 2017 to 2020. Firstly, the market segments established from the surveyed database in 2020 are distinctive from those seen in 2017 due to a possibly different segmentation method. The current market segments form more accurate groups of a different mix of personas instead of highlighting solely one persona to represent one group as in 2017. This better reflects the tendency of an average analog enthusiast to relate to more than one persona type. In addition, six identified segments based on persona types can be further categorized into two bigger segments: Analog Newcomers (Newcomer Artist, Newcomer Gearhead, and Newcomer) who are dominantly younger than 24 years old and Analog Professionals (Balanced Collector, Pure Artist, and Gearhead Artist) who are more mature in their ages.

Specifically, Artist was the dominant persona group worldwide across all ages from 16 years old as over 57% of the total surveyed analog photography enthusiasts felt related to this persona (Leppänen 2017). This Artist-oriented group remains important as the core members of the analog community in 2020. What is more interesting is that the Gearhead persona seems to plays a much more significant role in the current analog community than what the number showed in 2017. The same happens to Analog Newcomers as they are discovered to accumulate almost half of the surveyed respondents in 2020 compared to only 20.8% in 2017.

In terms of ages, the number of digital photography natives was found to grow 20% in the past three years due to the increasing entrance of young analog members under 18 years old of both genders. Interestingly, the fact that the Collector persona surpasses age boundaries (Leppänen 2017) is still valid in 2020, meaning that the passion for collecting film cameras exists in all ages including those under 18. In addition, the Analog Newcomers are dominantly younger than 24 years old and the Analog Professionals are more mature in their ages.

Regarding geographic location, Analog Newcomers are still popular in emerging markets in Asia (Leppänen 2017) and additionally Latin America & the Caribbean, where female members have a higher proportion than the rest of the world. Whereas there is a similar distribution of different segments in Europe, North America, and Australasia where Analog Professionals are more dominant.

Moreover, the research also established four major groups of analog consumers based on generations: GenZ, Millennials, GenX, and Boomers as well as five groups based on geographic regions: Europe, North America, Asia, Latin America & the Caribbean, and Australasia. The segmentation based on generations and geographic regions helps to compare different markets globally when the persona-oriented market segments can not be distinguished.

6.1.2. Characteristics of market segments

There is a distinction in the characteristics between the Analog Newcomers and the Analog Professionals. Firstly, the Analog Newcomers who have mostly shot film for up to 2 years generally have less experience than the Analog Professionals who mainly have at least 6 years of experience in film photography. It is fascinating that some analog enthusiasts with over 10-year experience still consider themselves as Newcomer, possibly due to the always-learning mindset. Regarding the number of cameras owned, Newcomer has the least number of analog cameras while Balanced Collector has the largest collection of film cameras. In terms of preferences of film camera types, Analog Newcomers prefer compact film cameras and Newcomer Artist favor instant film cameras more than the others. In contrast, Analog Professionals like TLR and large format cameras much more than their counterparts. Moreover, considering the motivations for searching for certain analog gear, Gearhead Artist and Pure Artist mostly research for analog gear because of their own professional use. This shows a relatively stronger buying intention for film photography products by Gearhead Artist and Pure Artist. On the other hand, fun or entertainment is the main reason for looking up analog gear for Analog Newcomers. Whereas Balanced Collector searches for film photography products for both professional use and entertainment equally. In addition, the rareness of analog gear is also a trigger for one out of six

Balanced Collector and one out of seven Newcomer Gearhead to look for certain gear. Finally, GenZ and Millenials are seen to spend more effort into researching for information and resolving their confusion when they cannot make a buying decision. While older generations are more likely to abandon their buying intention.

On the other hand, the market segments also share some similarity in terms of their preference in film over digital photography, the average usage frequency of analog cameras, number of issues with previously purchased film cameras, trust for different sources of advice, and importance of different factors when buying analog gear. Specifically, film photography is preferred the most by the Artist-oriented segments including Pure Artist, Newcomer Artist, and Gearhead Artist. Secondly, the majority of analog enthusiasts shoot film every week or even monthly. Thirdly, they also tend to have at least one camera-related issues from their past purchases. Fourthly, analog camera users generally believe in reviews the most and salespeople the least when buying film cameras, hence word-of-mouth including e-WOM is critical for Kamerastore. What is more, the most important factors to consider when buying analog gear is their condition, price, result images, and trustworthiness of the seller or store.

6.1.3. Attractiveness of market segments

Generally, the future outlook for film photography is bright as all respondents across segments have a positive attitude about their practice of film photography to increase or remain the same in the next 5 years. This is similar to their overall preferences of film versus digital photography, although an individual can shoot both film and digital. All six identified segments based on persona types consisting of those who are above 15 years of age and live in Europe, North America, Australasia, Asia, and Latin America & the Caribbean are measurable, accessible, substantial, and identifiable.

Among the obstacles for shooting film, it is revealed that Latin America & the Caribbean could be a promising market for Kamerastore due to their lack of professional stores selling adequate film photography equipment, thus, they mostly find deals on eBay and choose to buy gear from individual sellers or small stores on social media.

Professional online store is among the most common shopping channels in Europe, North America, and Australasia, thus analog enthusiasts living in these regions are more likely to buy from Kamerastore. However, Europe remains the most important market for Kamerastore as it shares the same logistics procedure. In addition, cross-border purchases tend to pose more risks and inconvenience for those living in Asia and Latin America & the Caribbean due to possible tax, customs, duty, high delivery costs, payment safety, and warranty. Moreover, there is more competition in North America and Australasia due to the availability of both local physical and professional online stores based in these regions in addition to eBay. Based on generations, professional online stores are more favored by older analog camera users above 22 years old.

In relation to online shopping frequency, Gearhead-oriented segments which make up 57.8% have the most frequent buyers of analog gear, thus they are the largest and most profitable group of buyers for Kamerastore. Despite purchasing analog gear online only occasionally, other segments including Pure Artist, Newcomer Artist, and Newcomer (47.1%) still form a significant group of buyers. All segments are willing to buy tested gear from trusted sellers or stores, thus, it once again confirms the utmost importance of gear condition and trustworthiness of sellers for analog enthusiasts when buying analog gear.

In conclusion, all six identified segments consisting of those who are between 23 and 74 and live in Europe are the most attractive for Kamerastore. Among which the Gearhead-related segments including Gearhead Artist, Balanced Collector, and Newcomer Gearhead are the most profitable and substantial in size, whereas the Newcomer and Newcomer Artist are anticipated with the strongest growth. Besides, the rest who are based in North America, and Australasia could be a minor segment of potential customers for Kamerastore when there is stock for certain products that cannot be found locally or the price is more competitive. Moreover, due to the growing base of Analog Newcomers and high value of credibility of sellers, Asia and Latin America & the Caribbean could be promising markets for Kamerastore in the near future under the condition that the company can relieve perceived risks in relation to gear condition, credibility, delivery cost, payment safety, and warranty.

6.1.4. Suitable digital marketing communications for the approach of potential market segments

In order to attract potential market segments, Kamerastore needs to reduce the perceived risks of potential consumers. First, the company should find more ways to leverage and effectively communicate about their extensive procedure of testing, cleaning, repairing, and restoring analog gear. Secondly, they need to strengthen their trustworthiness by improving the website functionality as part of SEO to reassure payment safety and improve the overall shopping experience. Moreover, diversifying the payment and delivery options as well as offering a suitable warranty can also help with relieving risk-averse potential consumers. In addition, the company should invest more in reference groups to facilitate e-WOM by developing more engaging and relevant content, influencer marketing, and social media marketing activities.

Social media is the most significant channel for the analog photography community and its members. In particular, Instagram and Youtube are found to be the most popular channels for analog enthusiasts on a weekly basis. This can be simply explained by the fact that

Instagram is the most commonplace for analog enthusiasts to share film photography work online, which makes it the largest open online source for inspiration for film photography. Whereas Youtube hosts the largest amount of videos, which is the most preferred content format by Analog Newcomers and Pure Artists alike, while it also acts as an effective search engine for relevant film photography content. In addition, Facebook is still an important platform, especially for Balanced Collectors. Therefore, Kamerastore needs to strengthen its social media marketing on Instagram and Facebook while further developing its online presence and content on Youtube as well as expanding online partnerships with relevant Youtube creators on film photography.

Google has a relatively important role when consumers proactively look for certain content and information about film photography or analog gear specifically. Thus, SEO and PPC advertising can be greatly useful for capturing potential visitors based on their search. Additionally, video campaigns can be adopted using Google Ads to increase outreach to potential analog enthusiasts via Youtube. Special attention should be focused on effective target audience strategies to optimize the return on investment from ads.

Moreover, since blogs and articles are an important channel and type of content for the Gearhead-oriented segments, more quality, and SEO-oriented content should be generated in article format to attract potential customers from these segments. There is a wide range of topics interested by all analog enthusiasts that can be used for making appealing content, from inspirations, reviews and comparisons, tutorials and tips on different photography styles, to discussions and interviews, etc.

6.2. Suggestions for further research

As the research studied only a sufficient selection of relevant questions with the main use of a-priori method to fulfill the research question, there is still plenty of potential for further analysis of the surveyed database. Further research should look more closely into the perception, motivation, attitude, and needs of analog consumers. For the case company, a thorough evaluation of the digital marketing strategy as well as situational analysis should be conducted to generate a more detailed implementation plan for improvement.

6.3. Reflection on personal learning

The making-process of this research has expanded the knowledge of the author on the film photography market globally while improving relevant skills in market research and quantitative analysis. The most challenging stage of the research was to narrow the scope of the research and then develop a concise and useful theoretical framework structure as well as select relevant data for inclusion in the research. The formation of the researching question also went through many adjustments to reach the final version employed for this research. Nevertheless, the author managed to choose the most essential and relatable sources to study for the research objectives and shorten the paper to meet the Haaga-Helia guideline for the bachelor thesis. With enthusiastic support from the advisors, the author has learned tremendously from this process in terms of both the academic aspect and personal growth. The research also enables the author to develop valuable networks within the industry of her interest.

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Appendices

Appendix 1. The full survey questions

1. How long have you been shooting film? *

- ◯ Less than 1 year
- ◯ 1-2 years
- ◯ 3-5 years
- ◯ 6-10 years
- ◯ Over 10 years

2. Which is most true about you? *

- ◯ I prefer film and only shoot digital when required
- ◯ I shoot both but prefer film
- ◯ I shoot both but prefer digital
- ◯ I have no preference

3. How alike are you with the personas above? *

	1 (I'm nothing like this)	2	3	4	5 (I'm exactly like this)
Collector *	◯	◯	◯	◯	◯
Gearhead *	◯	◯	◯	◯	◯
Artist *	◯	◯	◯	◯	◯
Newcomer *	◯	◯	◯	◯	◯

4. What do you like about film photography? *

- ☐ The lack of digital elements
- ☐ The experience while shooting
- ☐ The image results
- ☐ The film itself
- ☐ The philosophy
- ☐ The community
- ☐ Developing film
- ☐ The gear available

5. How many film cameras do you own? *

- ◯ 3 or less
- ◯ 10 or less
- ◯ 25 or less
- ◯ More than 25

6. What types of film cameras do you own? *

- [ ] 35mm
- [ ] Medium format
- [ ] Large format
- [ ] Instant
- [ ] Compact / Point & shoot
- [ ] Lomography
- [ ] Disposable

7. How often to you shoot film? *

- ○ Daily
- ○ Weekly
- ○ Monthly
- ○ Yearly
- ○ It's been over a year

8. What types of film cameras do you prefer shooting with? *

- [ ] SLR
- [ ] TLR
- [ ] Rangefinder
- [ ] Compact / Point & shoot
- [ ] Instant
- [ ] Folder
- [ ] Large format

9. Please tell us up to 3 of your favorite film brands: *

- [ ] Kodak
- [ ] Fuji
- [ ] Ilford
- [ ] Lomography
- [ ] Cinestill
- [ ] Adox
- [ ] Foma
- [ ] Other
- [ ] Expired film

10. Where do you usually share your film photography images? *

- ☐ Instagram
- ☐ Facebook
- ☐ Tumblr
- ☐ Flickr
- ☐ Reddit
- ☐ Forum
- ☐ Blog posts
- ☐ Physical sharing as prints
- ☐ I don't share publicly

11. How many people do you know <u>in person</u> that are passionate about film photography? *

- ◯ None
- ◯ Less than 5
- ◯ Less than 10
- ◯ Less than 20
- ◯ More than 20

12. In 5 years, I think my use of film will... *

- ◯ Increase
- ◯ Stay the same
- ◯ Decrease
- ◯ I don't know

13. What are the main things that make it difficult for you to keep shooting film?

- ☐ The overall effort needed
- ☐ Availability of stores selling adequate equipment
- ☐ Availability of qualified CLA/repair services
- ☐ Price of gear
- ☐ Price of film
- ☐ Availability of film
- ☐ Price of Lab services

14. Where do you get your film camera gear (not film) from? *

- [ ] Local physical stores
- [ ] Flea markets
- [ ] Forum, Facebook/online-hobbyist groups
- [ ] eBay or similar
- [ ] Online city/country specific classifieds (e.g. Craiglist)
- [ ] Social stores (Instagram, Facebook, Depop, Etsy, etc)
- [ ] Professional online used-camera retailers
- [ ] Online store of film camera manufacturers
- [ ] I don't know, I haven't bought one myself

15. What film photography content do you most search for? *

- [ ] Anything entertaining
- [ ] Reviews & comparisons
- [ ] Tutorials / tips
- [ ] Inspiration (images, photo essay)
- [ ] Research on a style (street, portrait, landscape, etc)
- [ ] Gear repair
- [ ] Discussions
- [ ] Interviews
- [ ] Vlogs
- [ ] Contest
- [ ] News

16. What formats do you prefer consuming analog photography content? *

- [ ] Video
- [ ] Audio (podcasts)
- [ ] Articles
- [ ] Photo-centric (instagram, flickr, etc)

17. How often do you use the following online channels for relevant film photography content? *

	Daily	Weekly	Monthly	Rarely	Never
Instagram *	○	○	○	○	○
Facebook *	○	○	○	○	○
Pinterest *	○	○	○	○	○
Flickr *	○	○	○	○	○
Reddit *	○	○	○	○	○
Google *	○	○	○	○	○
Youtube *	○	○	○	○	○

18. From your last 5 camera purchases, how many times did you have problems with the camera(s)? *

- ◯ None
- ◯ 1-2 times
- ◯ 3-4 times
- ◯ All 5 times

19. Where do you repair your film camera gear? *

- ☐ A local physical store
- ☐ A hobbyist I know in person
- ☐ A person I discovered online
- ☐ A store I discovered online
- ☐ I do it myself
- ☐ I haven't repaired any gear

20. Where do you buy film? *

- ☐ Local physical stores
- ☐ Online stores

21. Where do you develop your film? *

- ◯ A place in my city
- ◯ A place in my country
- ◯ In another country
- ◯ I do it myself

22. Where do you scan your film? *

- ◯ A place in my city
- ◯ A place in my country
- ◯ In another country
- ◯ I do it myself
- ◯ I don't scan

23. Where do you sell your film camera gear? *

- ☐ Local physical stores
- ☐ Flea markets
- ☐ Forum, Facebook/online-hobbyist groups
- ☐ eBay or similar
- ☐ Online city/country specific classifieds

24. The last time I looked for a specific piece of gear was because of: *

- ◯ My own needs/goals for professional use
- ◯ Entertainment or fun
- ◯ A trend
- ◯ Social reasons
- ◯ The gear is rare or uncommon
- ◯ Other

25. When buying a camera, I follow the advice of: *

- ◯ Friends
- ◯ Reviews
- ◯ Sellers
- ◯ Magazines or books

26. Please rank the importance of the following factors when you choose a film camera gear to buy: *

Please rank at least 6 factors, each ranking number (1-12) can be used once only.

1 (the most important)	◯ Price ◯ Gear's condition ◯ Gear's result images ◯ Qualified CLA service for gears ◯ Free delivery ◯ Fast delivery ◯ Return service ◯ Warranty/Guarantee ◯ Trustworthiness of seller ◯ Fast & responsive seller's communications ◯ Seller's presence on social media ◯ Ability to check gear physically

27. When I can't choose a film camera gear to buy, I will delay to: *

- [ ] Clarify my need and goals
- [ ] Seek advice from others
- [ ] Narrow down my set of options
- [ ] Find additional information
- [ ] Wait for sales or a more affordable offer
- [ ] Ignore the issue completely

28. I buy film camera gear online: *

- ◯ Never
- ◯ Rarely
- ◯ Once/twice a year
- ◯ Every few months
- ◯ Once a month

29. When I look for film camera gear, I tend to: *

	1 (Not likely at all)	2	3	4 (Very likely)
Buy unchecked gear online *	◯	◯	◯	◯
Bid for unchecked gear on eBay or similar places *	◯	◯	◯	◯
Bid for checked gear on eBay or similar places *	◯	◯	◯	◯
Buy checked gear by trusted sellers/stores *	◯	◯	◯	◯
Buy checked and serviced/CLA gear by trusted sellers/stores *	◯	◯	◯	◯

30. My biggest concerns about buying film camera gear online are: *

- [ ] Trustworthiness of sellers
- [ ] Available information on gear's condition
- [ ] VAT, customs, duty
- [ ] Shipping cost
- [ ] Delivery speed
- [ ] Return policy
- [ ] Warranty/Guarantee
- [ ] Payment safety
- [ ] Other ________

31. When I sell my film camera gear, I want to do it with the most: *

- ☐ Ease
- ☐ Profit
- ☐ Usefulness of the gear to others
- ☐ Integrity
- ☐ Transparency
- ☐ Human contact (events, chatting the buyer etc)

32. Gender: *

- ◯ Female
- ◯ Male
- ◯ Other

33. Age: *

34. Country: *

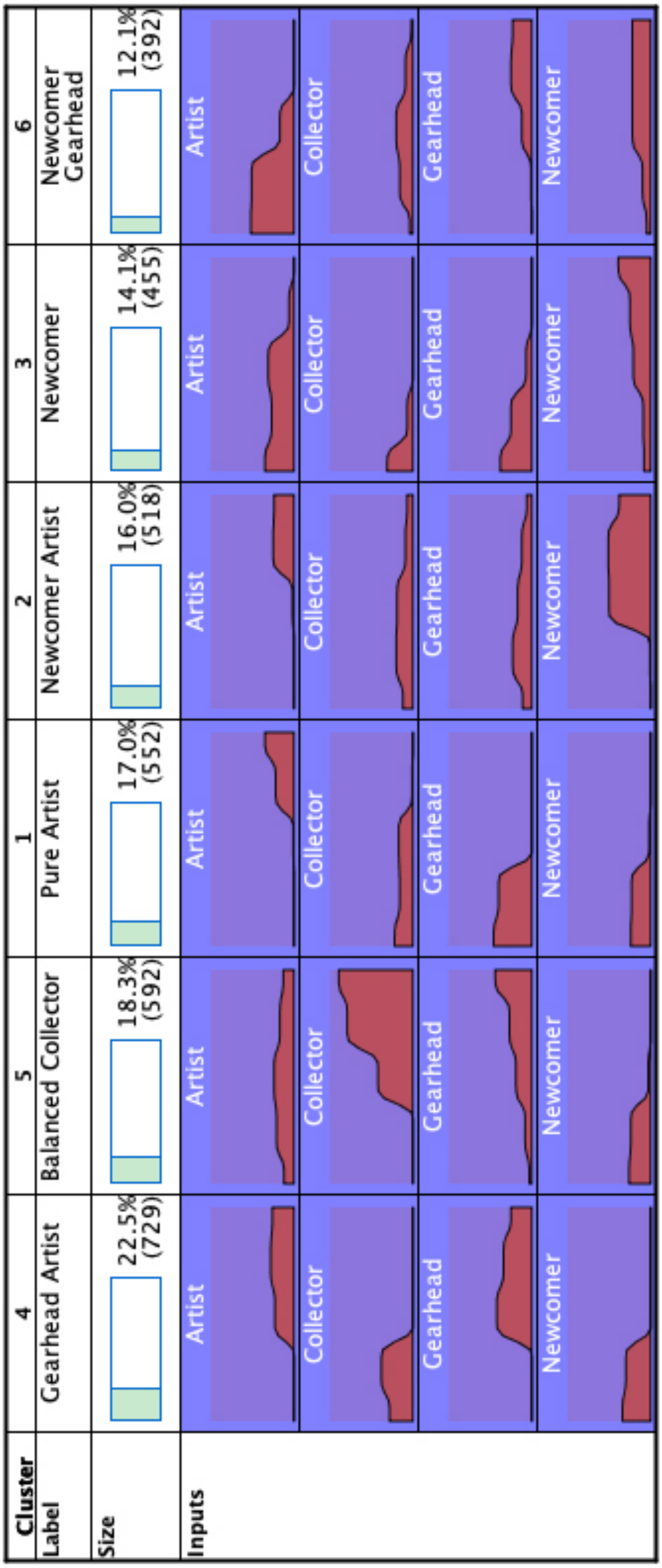
36. City:

____

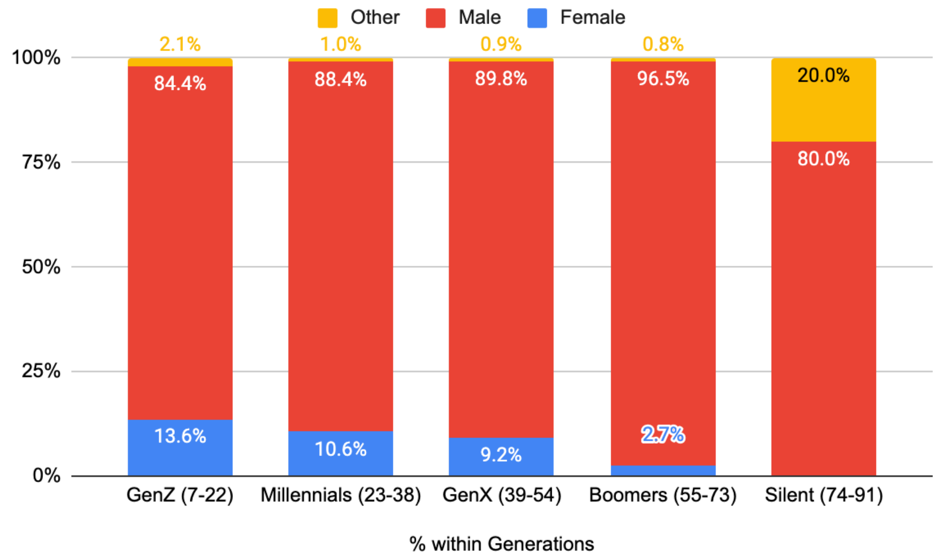
37. Did you also take part in the 2017 survey? *

- ◯ Yes
- ◯ No

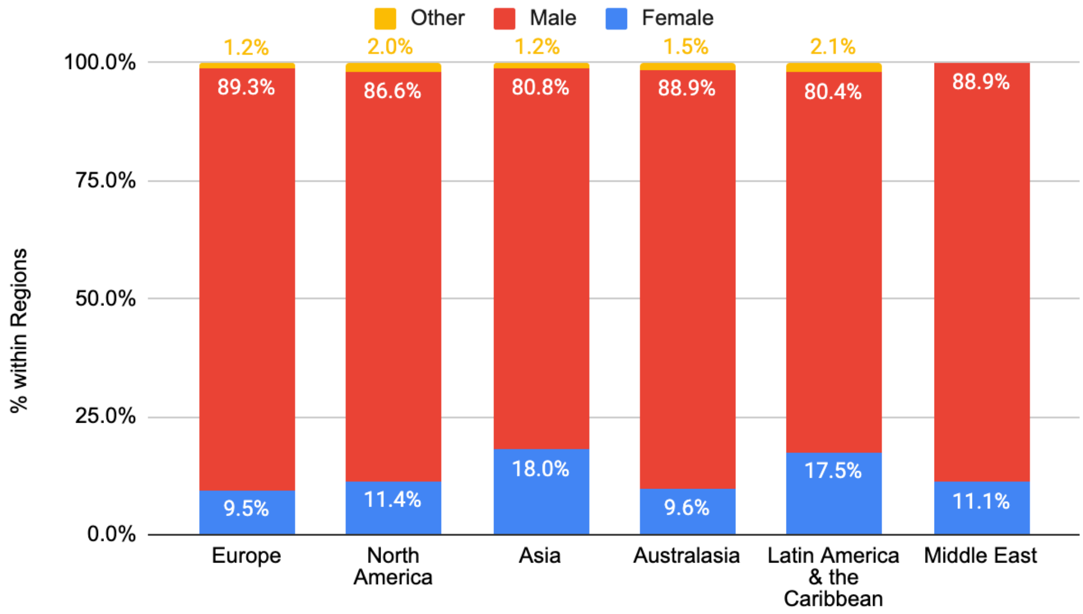
Appendix 2. Cluster analysis for market segmentation (n=3238)



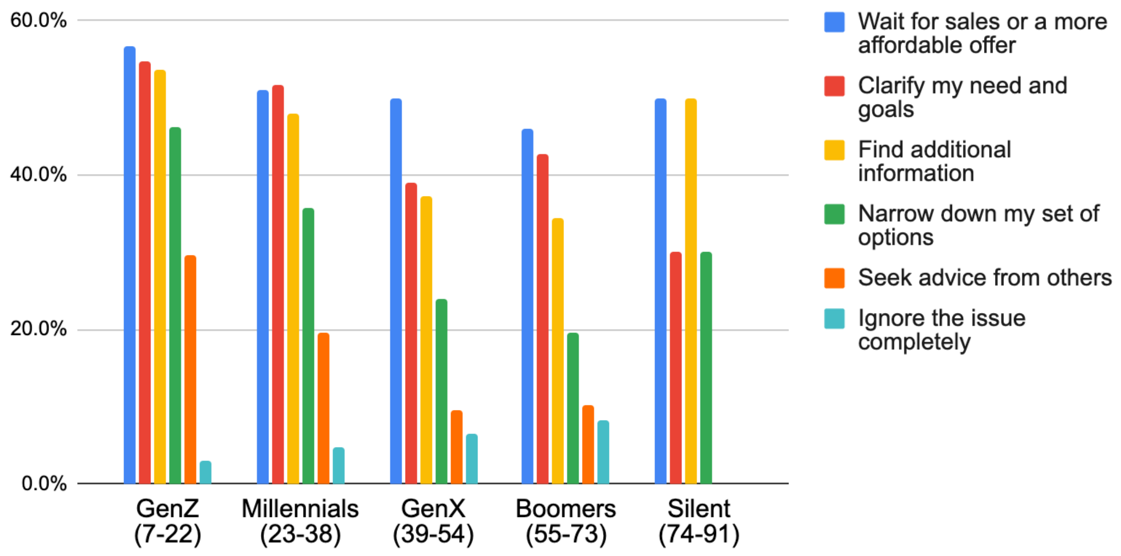
Appendix 3. Cross-tabulation of frequency of genders among different generations (n=3233)



Appendix 4. Frequency of genders within geographic regions (n=3238)



Appendix 5. Actions taken when facing difficulty in choosing to buy a film camera (n=3182)



Appendix 6. Obstacles for shooting film: the need for stores selling adequate equipment within regions (n=3116)

	Europe	North America	Latin America & the Caribbean	Asia	Australasia	
Availability of stores selling adequate equipment	391	246	71	62	40	Count
	24.80%	23.30%	49.70%	37.60%	31.00%	% within Regions
Availability of qualified CLA/repair services	614	426	55	77	70	Count
	39.00%	40.30%	38.50%	46.70%	54.30%	% within Regions

Appendix 7. Frequency of choice of shopping channels (n=3237)

	Responses (N)	Responses (%)	Percent of Cases
eBay or similar	2485	29.8%	76.8%
Local physical stores	1270	15.2%	39.2%
Professional online us	1169	14.0%	36.1%
Flea markets	1140	13.6%	35.2%
Forum, Facebook/onl	778	9.3%	24.0%
Online city/country sp	758	9.1%	23.4%
Social stores (Instagr	438	5.2%	13.5%
Online store of film ca	258	3.1%	8.0%
I don't know, I haven't	56	0.7%	1.7%
Total	8352	100%	258.0%

Appendix 8. Cross-tabulation of frequency of different shopping channels (Question 14) among six segments (n=3237)

% within segment	Pure Artist	Gearhead Artist	Balanced Collector	Newcomer Gearhead	Newcomer Artist	Newcomer
eBay or similar	75.4%	81.3%	84.0%	75.4%	75.3%	64.6%
Local physical stores	41.8%	39.9%	43.2%	32.7%	39.0%	35.6%
Professional online retailers	39.1%	42.2%	43.1%	27.9%	27.6%	30.3%
Flea markets	33.5%	28.1%	50.2%	37.3%	36.1%	26.4%
Online-hobbyist groups	21.0%	28.1%	26.9%	23.0%	23.9%	18.5%
Online local classifieds	20.3%	24.3%	26.4%	28.9%	23.2%	17.6%
Social stores	10.9%	12.3%	14.2%	12.0%	17.6%	14.5%
Online store of camera brands	9.8%	6.6%	7.9%	5.6%	10.0%	7.7%
I don't know	1.8%	1.4%	0.0%	1.3%	2.9%	3.5%
Total count within segment	552	729	592	391	518	455

!Percentages and totals are based on respondents.

Appendix 9. Frequency table of the online shopping frequency for film cameras (Question 28) (n=3182)

	Frequency	Percent
Never	118	3.6
Rarely	644	19.9
Once/twice a year	1084	33.5
Every few months	1044	32.2
Once a month	292	9
Total	3182	98.3

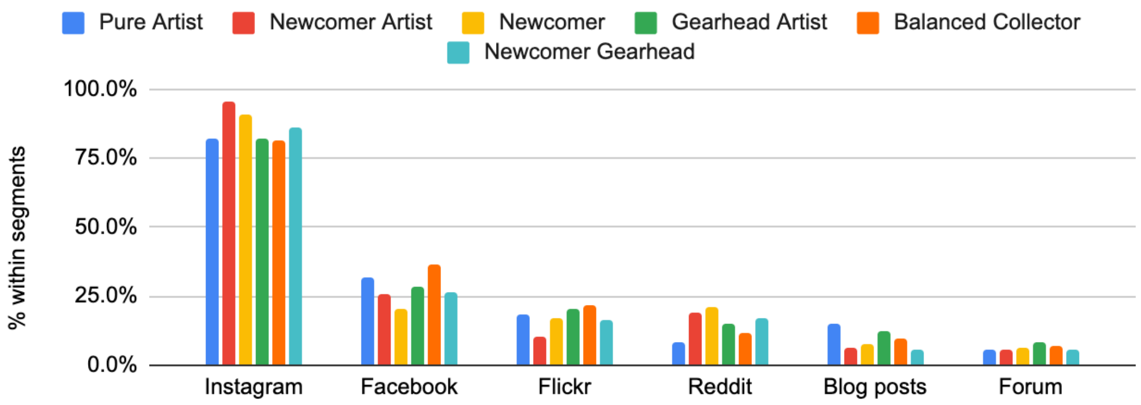
Appendix 10. Frequency of obstacles from shopping online for analog gear (n=3238)

	Responses (N)	Responses (%)	Percent of Cases
Trustworthiness of se	2452	26.5%	75.7%
Available information	2452	26.5%	75.7%
Shipping cost	909	9.8%	28.1%
Payment safety	850	9.2%	26.3%
Warranty/Guarantee	804	8.7%	24.8%
VAT, customs, duty	715	7.7%	22.1%
Return policy	699	7.5%	21.6%
Delivery speed	259	2.8%	8.0%
Other	129	1.4%	4.0%
Total	9269	100%	286.3%

Appendix 11. Frequency of different online channels for sharing film photos (Question 10) (n=2693)

	Responses (N)	Responses (%)	Percent of Cases
Instagram	2315	51.7%	86.0%
Facebook	766	17.1%	28.5%
Tumblr	78	1.7%	2.9%
Flickr	470	10.5%	17.5%
Reddit	407	9.1%	15.1%
Forum	177	4.0%	6.6%
Blog posts	263	5.9%	9.8%
Total	4476	100.0%	166.3%

Appendix 12. Frequency of online channels used for sharing photos among segments (n=2692)



Appendix 13. Frequency of film photography contents (n=3237)

	Responses (N)	Responses (%)	Percent of Cases
Inspiration (images, photo essay)	2215	17.2%	68.4%
Reviews & comparisons	1853	14.4%	57.2%
Tutorials / tips	1707	13.2%	52.7%
Research on photography styles	1525	11.8%	47.1%
Anything entertaining	1203	9.3%	37.2%
Discussions	1088	8.4%	33.6%
Gear repair	1072	8.3%	33.1%
Interviews	761	5.9%	23.5%
Vlogs	670	5.2%	20.7%
News	630	4.9%	19.5%
Contest	177	1.4%	5.5%
Total	12901	100.0%	398.5%

Appendix 14. Cross-tabulation of frequency of film photography contents among segments (n=3237)

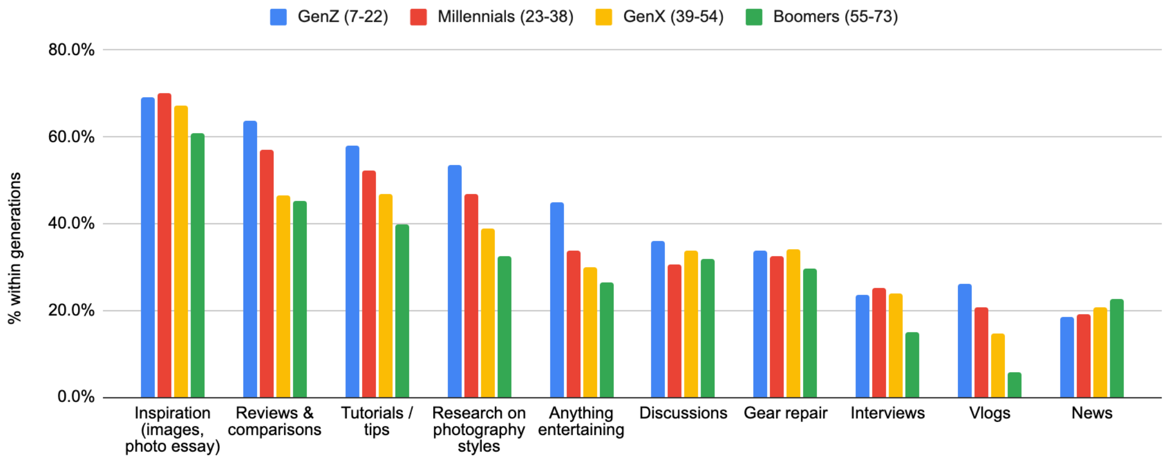
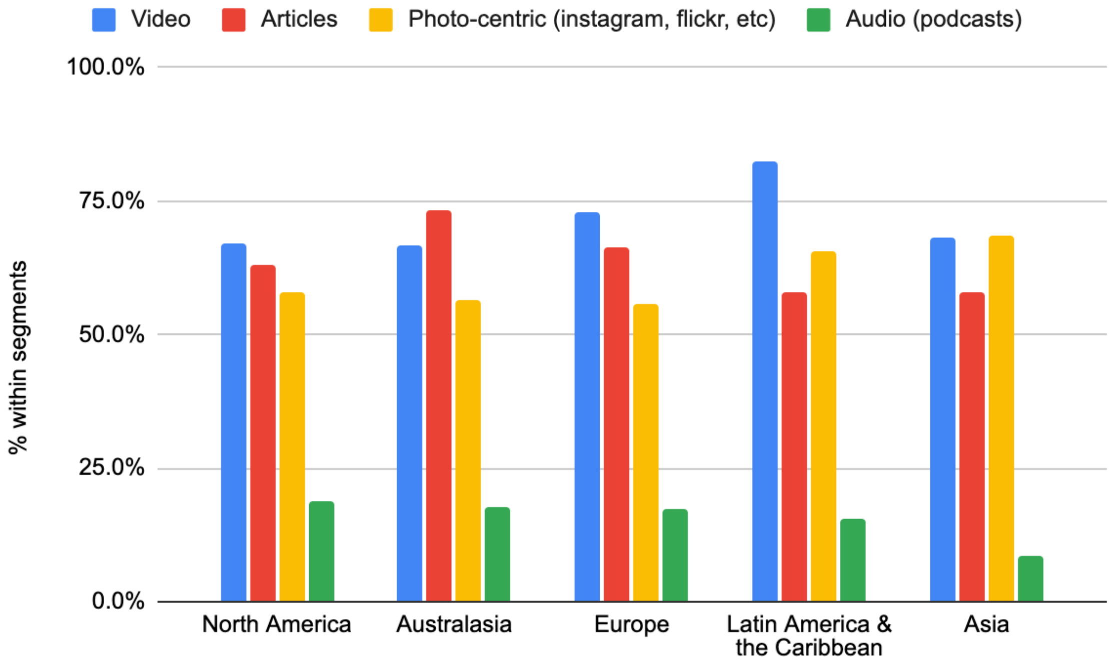


Figure . Preference of film photography contents among generations (n=3237)

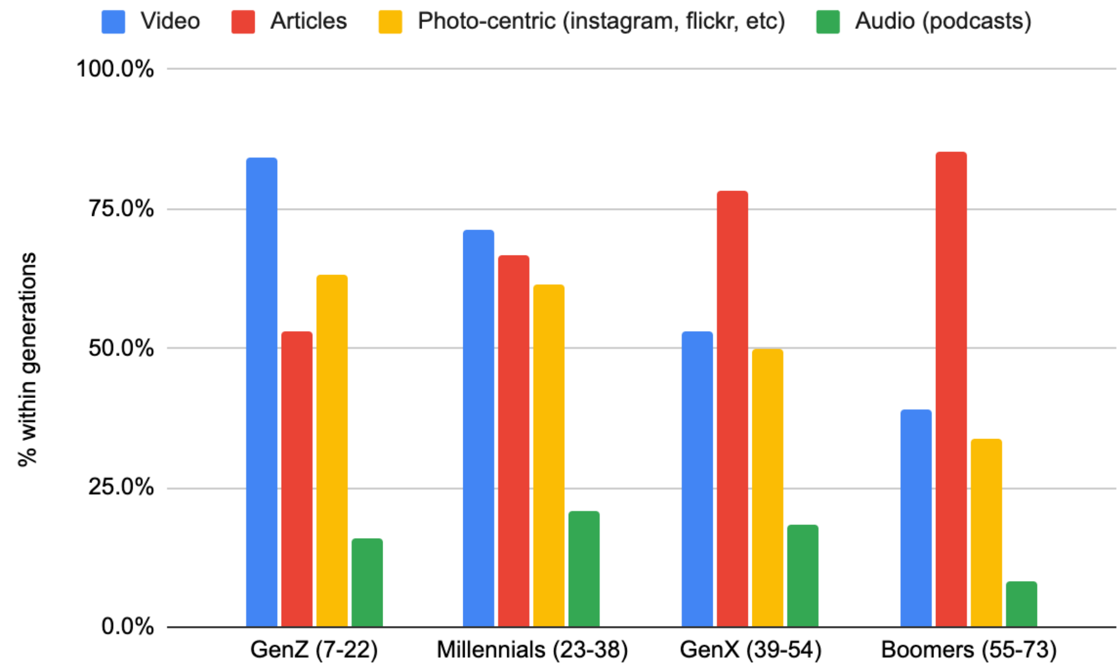
Appendix 15. Frequency of content formats preferences (n=3237)

	Responses (N)	Responses (%)	Percent of Cases
Video	2292	33.6%	70.8%
Articles	2090	30.6%	64.6%
Photo-centric (instagram, flickr, etc)	1879	27.5%	58.0%
Audio (podcasts)	562	8.2%	17.4%
Total	6823	100.0%	210.8%

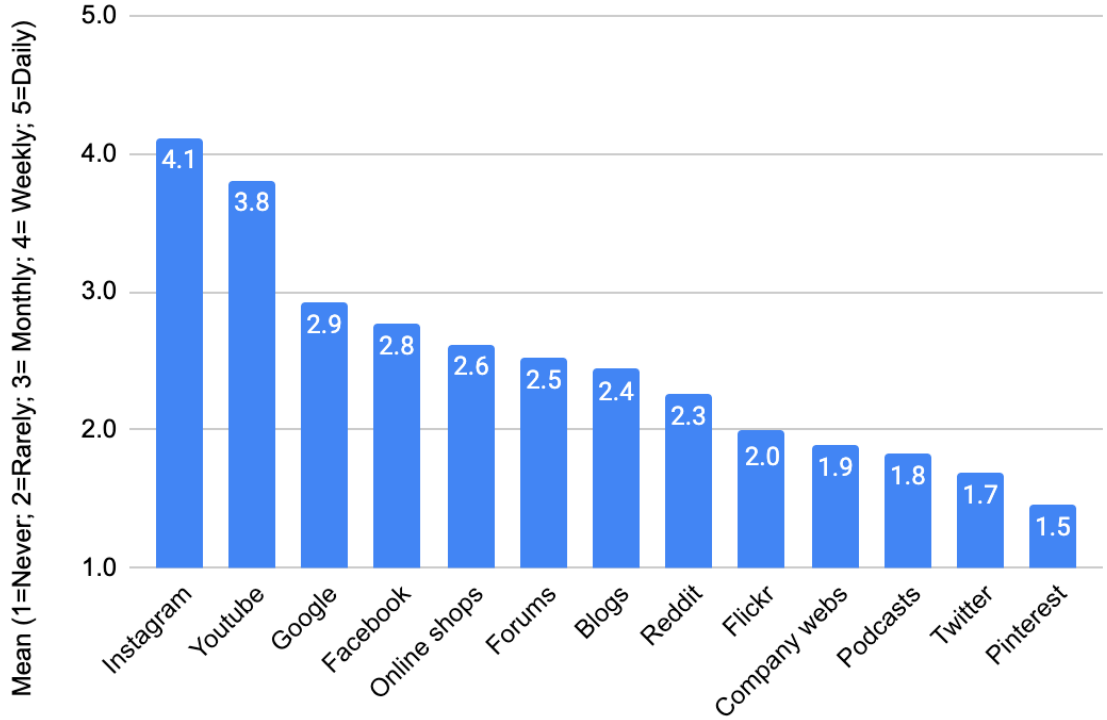
Appendix 16. Cross-tabulation of frequency of content formats preferences within regions (n=3237)



Appendix 17. Cross-tabulation of frequency of content formats preferences within generations (n=3237)



Appendix 18. Frequency of using different online channels for finding analog photography content (n=3237)



Appendix 19. Cross-tabulation of frequency of using different online channels for finding analog photography content within segments (n=3237)

	Newcomer	Pure Artist	Newcomer Artist	Gearhead Artist	Balanced Collector	Newcomer Gearhead	Total
Instagram	4.17	3.96	4.61	4.04	3.94	4.11	4.12
Youtube	3.7	3.61	3.87	3.89	3.84	3.96	3.81
Google	2.73	2.68	2.97	3	3.11	2.98	2.92
Facebook	2.45	2.77	2.77	2.78	3.12	2.62	2.77
Online shops	2.41	2.52	2.61	2.72	2.76	2.6	2.62
Forums	2.18	2.46	2.23	2.77	2.79	2.52	2.52
Blogs	2.27	2.32	2.28	2.63	2.53	2.5	2.44
Reddit	2.33	1.84	2.57	2.28	2.1	2.57	2.26

Mean (1=Never; 2=Rarely; 3= Monthly; 4= Weekly; 5=Daily)

Appendix 20. Cross-tabulation of frequency of using different online channels for finding analog photography content within generations (n=3237)