Consumer Survey on Digital Storage
In Consumer Electronics 2008

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Acknowledgements

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1. Executive Summary

This consumer survey accompanies and informs the companion report Digital Storage in Consumer Electronics 2008 published in January 2008 by Coughlin Associates. The survey covered many topics of importance in consumer electronics digital storage requirements such as the number of digital photographs and home videos made in a year, hours of TV watched and recorded. It also discovers trends in consumer attitudes and actions such as tendency to backup, use of electronic gaming and the importance of various characteristics in the purchase of video recording video playing equipment, backup and other consumer activities. Cross-correlations of many of these trends to backup frequency, game ownership and hours of television recorded help to understand the more complex relationships between consumer electronics use and storage demand.

There was some variation in results as a function of gender and there is a section of the report that analyzes the results and survey questions as a function of age. In the final section of the report the results of the earlier section is used to create projections for commercial and user generated content out to 2013. Following are some key findings of the survey and the resulting consumer storage projections.

Key Points:

Demographics or General Trends

- The survey was somewhat higher in female than mail participants (43% male, 57% female). Survey age breakdown 26% (18-25 years), 30% (26-35 years), 24% (36-45 years) and 20% (46-55 years). Most households had 2 to 3 members and less than 13 % had 5 or more members.
- Participants owned many common CE devices using storage and in general saw the ability to record content as extremely important.
- More than 50% of participants thought that storing TV content long term was important or very important.
- 47% thought that it was important or very important to share content with other CE devices.
- 48% thought it important to transfer content to permanent removable storage.
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Consumer Electronics Usage

- 58% recorded 3 hours or more of TV per week with 23% of that number recording 10 hours or more.
- 45% of participants recorded at least one movie a week with 16% of that number recording 3 or more movies per week.
- Convenience was the greatest reason to make recordings of TV but 35% of participants were motivated by building a library of TV content.
- While most people delete old content from their DVR/PVRs 17% said that they keep everything that they record.
- 45% of participants had more than 200 photographs on their computers and 17% had more than 1500 photographs.
- 46% took more than 100 digital photographs annually with 25% taking over 400 photographs annually.
- 36% recorded more than 2 hours of home video annually with 11% recording more than 10 hours annually.
- Downloading of TV and movies was not as common. Only 15% of participants said that they downloaded more than 2 hours of content. 15% of participants also said that they had already downloaded more than 10 hours of content.
- 33% said that they downloaded 2 or more songs per week with 9% saying they downloaded 10 or more songs.
- 36% had 100 or more downloaded songs in the household with 10% having 1000 or more songs.
- 38% had purchased 3 or more games in the last two years with 12% purchasing more than 8 games over that time.
- 50% had 6 or more games overall with 26% having more than 15 games.
- Most people wanted to have one or more videos stored on a single disc.
- 57% wanted to permanently store entire TV series.
- 63% wanted to keep copies of their medical records.
- 66% wanted to store their entire music collection.

Storage

- Most storage of content was on hard disk drives (either internal or external).
- 51% said that a 1 TB disc would be useful to them.

Backup

- 46% said that either they didn’t know how often they backed up their data or did it less than once per year.
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- Except for digital photos the majority of participants didn’t backup their commercial or user generated content.
- 53% of participants said that it was somewhat important or very important to store backups out of their homes and 67% said that it was important to be able to back up quickly.
- 57% said that it was somewhat important or very important to have tamper-proof backups and 56% said that they that it was important or very important to have multiple backups from different dates.
- 59% thought it was somewhat important or very important to have backup durability and 64% said that it was somewhat important or very important to have fast online backups. 71% thought it was somewhat or very important to have data privacy in online backup. 74% said that security in online backup was somewhat or very important.

Games
- Graphics, having a variety of games available and computer integration in games were most important factors for participants.

Cross-correlations
- Factors of the greatest importance in purchasing a video player were playing and recording HD, storing content on a single disk, storage of a library of content.
- A higher number of users that used DVR/PVRs recorded more hours of TV.
- Heavy TV recording people especially like the convenience of recording.
- Heavy users of TV recording may be less likely to keep the content that they record.
- Most users that had lots of content also tended to make frequent backups.

Age
- Younger users tended to own more entertainment electronics.
- Older users tended to record more TV than the younger users.
- Music downloading was a bit more common with younger users but only the 46-55 year olds showed appreciably less use of this technology.
- Younger users tended to be more likely to backup their content than the older users.
- Younger users were less concerned by privacy than older users.

Projections
- By 2015 overall consumer content, including commercial, personal as well as shared content could add up to about 760 Exabytes worldwide.
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- Projections based up on a consumer survey show that we could expect over 2.2 TB of new content in an average home in 2013 including backups.
- By 2013 total content in an average home could total almost 9 TB. 5 TB of this is commercial content.
- Projections for the upper 10% most active users of content in the home could easily see their storage capacity requirements double those of the average user.
- After 2010 Life Logs and other new content capture and sharing technologies could drive the use of storage capacity for user generated content to enormous levels.
ANNOUNCING TWO NEW REPORTS

(1) The Consumer Survey on Digital Storage in Consumer Electronics 2008 is a 93 page, 120 figure document that summarizes and analyzes the results from a comprehensive survey of 376 US residents.

(2) The Digital Storage in Consumer Electronics 2008 report is a detailed look at major consumer electronics applications for mass storage. This comprehensive 150-page document, authored by Tom Coughlin of Coughlin Associates and Jim Handy of Objective Analysis, has 74 figures and 17 tables.

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