

Japanese Film Photography Market Survey 2024  
Results & Insights

FilmFocus



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## 1. Introduction

We conducted “Film Photography Survey 2024” between November 26 and December 31, 2024. The survey was targeted at the Japanese audience who has experience of film photography in the past year, and was conducted using an online survey form. It received a total of 802 responses. This report presents the results of the survey in the form of statistics and discussion.

We would like to thank everyone who responded to the survey, sent out and spread the word about the survey, and provided us with advice regarding the survey.

## 2. Background

Past surveys on film photography in the Japanese market include a user survey conducted by Ricoh in 2023 in conjunction with its “Film Camera Project”, and a survey on film photography conducted by Lomography Japan in 2019. However, none of these surveys have published detailed aggregate results, and there are currently no widely accessible, fixed-point surveys on film photography in Japan.

Worldwide, ILFORD Photo conducts the “Global Film Users Survey” once every few years. The 2014 and 2018 editions of the survey involved 2,100 and 6,800 participants, respectively. The survey results are partially published, and provide valuable quantitative data on the current state of film photography. In addition, in reddit, the online social media, some users have conducted surveys with 327 and 1,522 participants in 2015 and 2020, respectively.

We planned and conducted this survey to fill the gap for such an open survey, but targeted at the Japanese market. By quantitatively surveying and reporting on the actual conditions and needs of users, we hope to make a contribution to the Japanese film photography ecosystem.

## 3. Summary

- **Japanese film shooters used an estimated average of 13.7 rolls of 35mm film per year;** those using 120 film accounted for about half of the respondents, using 6.7 rolls of 120 film per year. Those who used sheet film accounted for less than 10% of the total.
- **Japanese film photographers own an estimated average of 6.2 film cameras.** The number of cameras owned increases with years of experience, with those who have been film photographers for more than 10 years owning an average of 8.0 film cameras.
- Among those who started film photography in the past five years, the highest percentage were triggered by the Internet/social networking sites. Online information has become an important factor in attracting new film users.
- **30% of respondents increased their frequency of film use over the past year,** slightly more than the 27% who decreased. The most important reason for the increase was the purchase of a new camera, while the most important reason for the decrease was cost.



## 4. Results

### 4-1. Reason to start film photography

Different characteristics were observed depending on the years of experience. Among those who started film photography within the past 5 years, “Internet/SNS” accounted for the largest percentage as a motivation. As the years of experience increased, the proportion of respondents who were motivated by “family” increased, with approximately one in four of those in the 3-10 years experience group having started film photography because of family influence. On the other hand, this trend did not apply to those who have been film photographers for more than 10 years, with the most common response being that “film was the only option”.

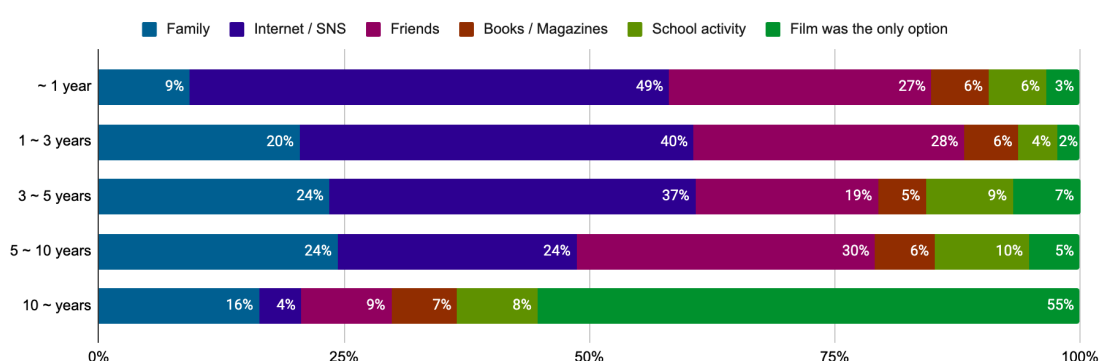


Figure 1: How did you get started in film photography, by years of experience (single answer)

### 4-2. What do you like about film photography?

When asked to answer multiple questions, the most common responses overall tended to be “the look of the photo” and “the excitement of the process”. We also found that the percentage of respondents who preferred “the fun of developing and printing” increased as the years of experience increased. This result suggests that people who started film photography because they were attracted to the unique textures and processes of film, “discovered” new pleasures such as developing and printing as they continued to take pictures.

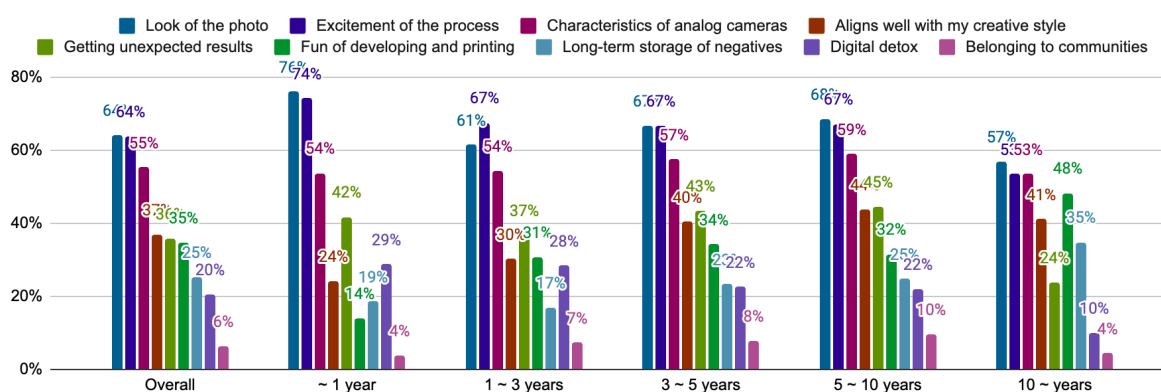


Figure 2: What do you like about film photography, by years of experience (multiple answer)

### 4-3. How do you get information about film photography?

Online resources such as “SNS”, “Brand official websites”, and “Non-official websites” were the majority of information sources. Of these, SNS was the most frequently used means of gathering information, regardless of years of experience. In the group with 10 or more years of experience, the percentage of respondents who cited “official websites of manufacturers” exceeded the percentage of those who cited “websites other than those of manufacturers.”

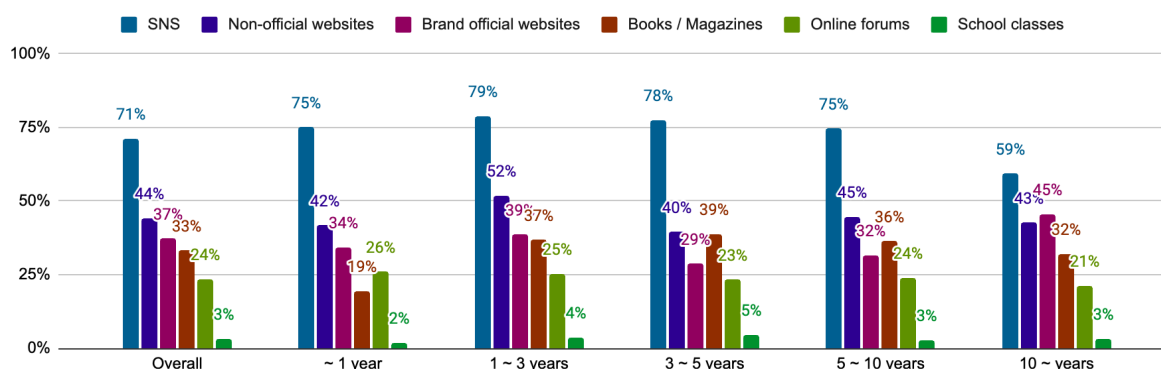


Figure 3: How do you get information about film photography, by years of experience (multiple answer)

### 4-4. Type and number of films used in the past year

When asked about the type and number of films used in the past year, 96% of respondents used at least one 35mm film and 54% used at least one 120 film. Twenty percent used disposable cameras and less than 10% used sheet film. Heavy users, who used “50 or more” films per year, accounted for 6% of all 35mm film users and 1% of 120 film users.

Roughly estimated from the results of the responses The average number of films used by film users per year is approximately 13.7 for 35mm film and 6.9 for 120 film<sup>1</sup>.

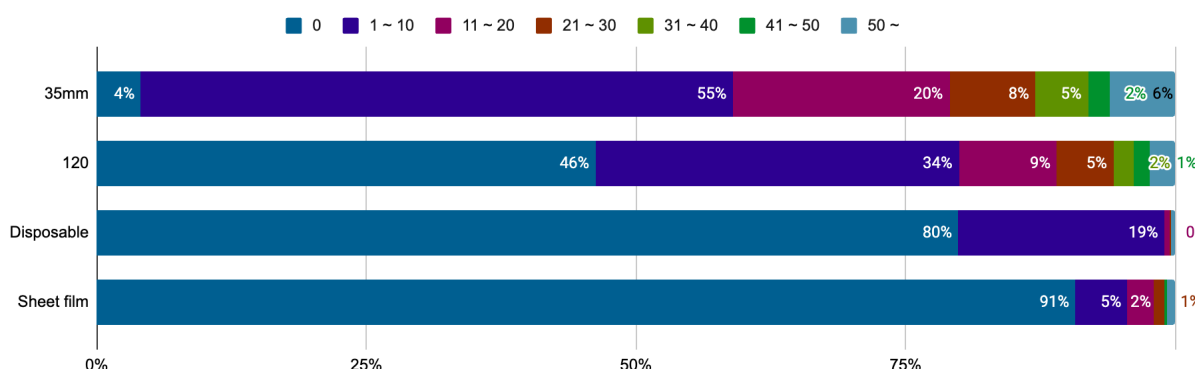


Figure 4: Type and number of films used in the past year

<sup>1</sup> For responses from options such as “5-10” and “11-20”, we took the median of the range as the representative value, and we calculated the weighted average of the median to obtain a rough estimate.

#### 4-5. Change in frequency of film use

Thirty percent of respondents said that the frequency of their film use “increased” over the past year, slightly exceeding the rate of “decreased” users at 27%.

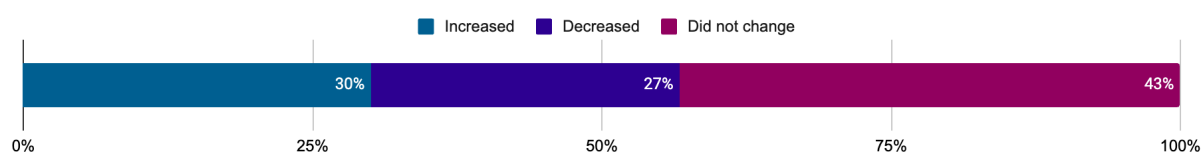


Figure 5: Change in frequency of film use

The most common reason for the increase was “purchase of a new camera” (23%), followed by “recently started or resumed” (12%). Appearance of new film cameras such as RICOH Pentax 17 could have played a significant role here. On the other hand, the most common reason for the decrease was the “increased cost” (70%), far outnumbering the other reasons.

#### 4-6. Film brand used in the past year

Respondents were asked which brands of film they have used in the past year. Fujifilm and Kodak have high usage rates regardless of years of experience, but Ilford shows a trend of increasing usage as years of experience increases, with 35% of respondents with less than one year of experience and 57% with 10 or more years of experience. Lomography and Cinestyl were found to be used most frequently in the 3-5 years of experience group.

We also calculated the number of film brands used. Comparing years of experience revealed that the number of brands used continues to increase until the fifth year of film photography, but after five years, the types of brands used begin to decline. While there is a process of experimenting with different brands and films during the beginner stage to find the one that best suits one’s tastes, there is also a tendency for one’s favorite brand to become more established as one gains experience.

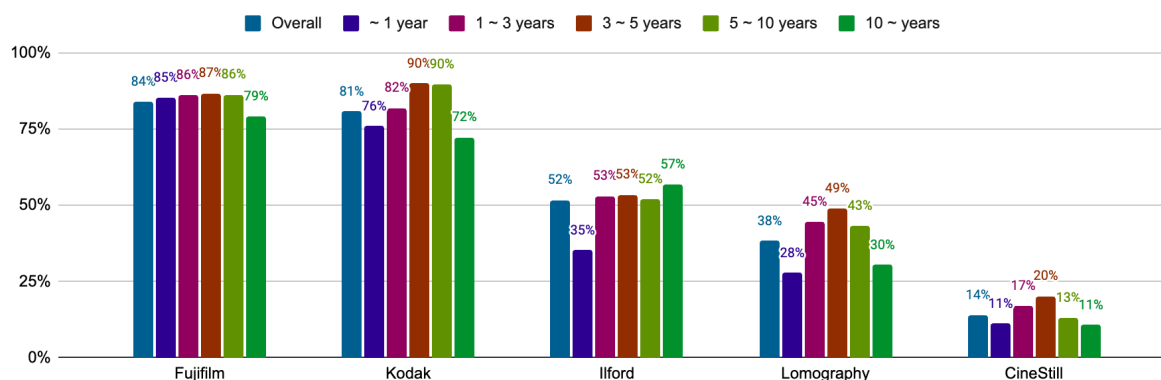


Figure 6: Film brand used in the past year (multiple answer)

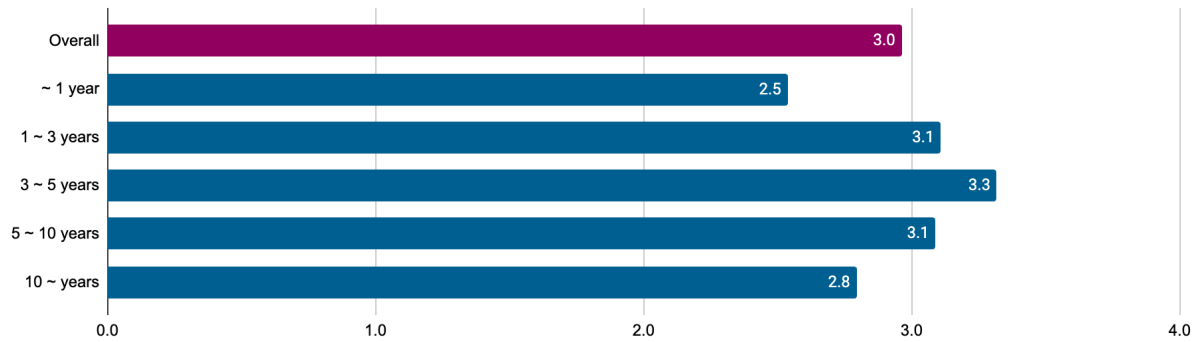


Figure 7: Number of film brands used, by years of experience

#### 4-7. Number of film cameras owned

Users with more years of experience tend to own more film cameras. The average number of film cameras owned by all respondents was 6.2. Those who have been film photographers for less than a year own an average of 3.5 film cameras, while those who have been film shooters for 10 years or more own an average of 8.0 cameras.

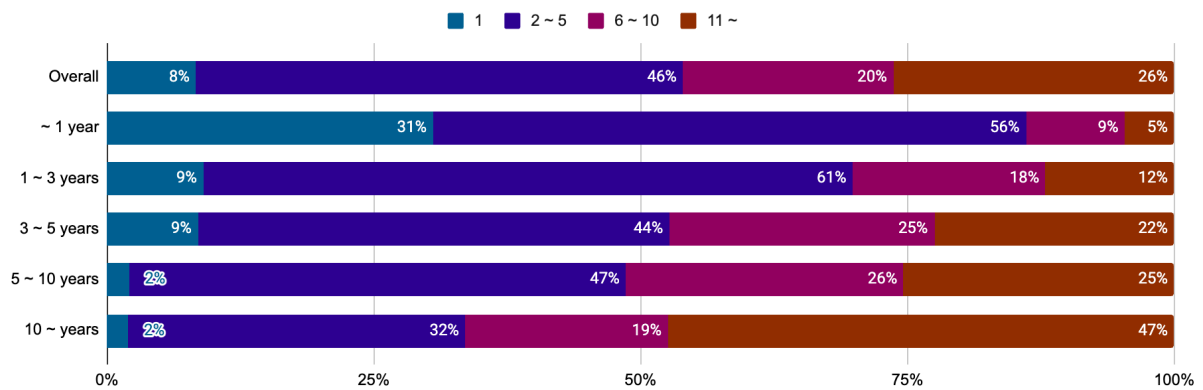


Figure 8: Number of film cameras owned, by years of experience

#### 4-8. Film users' values

To gauge film users' values, we asked them using a 10-point Likert scale for each of the following items. The average scores for each were as follows:

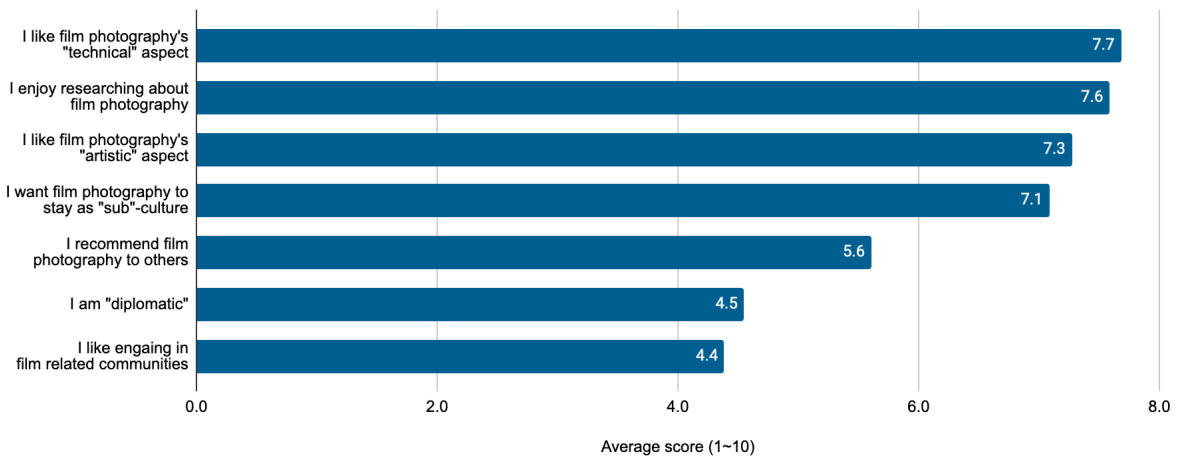


Figure 9: Film users' values, average score

Furthermore, a correlation analysis of these items yielded interesting results. Those who “like to research” tended to be more interested in “technical” aspects than “artistic” aspects, suggesting that those who research film photography enthusiastically are more likely to be interested in technical knowledge, know-how, equipment, and processes. Those who “recommend film photography” are also more diplomatic and community-oriented, suggesting that those who recommend film photography to others are social by nature and may have a more positive attitude toward the community.

We could also see a certain degree of compatibility between artistic and technical orientation. Those who are attracted to the artistic aspects of film are not completely indifferent to technology, but prefer to explore a certain level of knowledge.

	researching	artistic	technical	recommend	diplomatic	communities	subculture
I enjoy [researching] about film photography	1.00	0.39	0.50	0.35	0.20	0.30	0.13
I like film photography's [artistic] aspect	0.39	1.00	0.37	0.24	0.14	0.17	0.29
I like film photography's [technical] aspect	0.50	0.37	1.00	0.34	0.14	0.19	0.14
I [recommend] film photography to others	0.35	0.24	0.34	1.00	0.36	0.34	0.18
I think I am [diplomatic]	0.20	0.14	0.14	0.36	1.00	0.43	0.10
I like engaging in film related [communities]	0.30	0.17	0.19	0.34	0.43	1.00	0.21
I want film photography to stay as [subculture]	0.13	0.29	0.14	0.18	0.10	0.21	1.00

Figure 10: Correlation analysis of film users' values



#### 4-9. Film development method

Finally, we asked respondents how they develop the film they have finished shooting. Sixty-seven percent of the respondents develop all of their films in a laboratory, 26% develop their films in a laboratory or by themselves, and 7% develop all of their films by themselves.

The percentage of respondents who develop their own films tends to increase as the years of experience increases. The group with the highest percentage of self-developers was those with more than 10 years of experience, with a total of 44% of the respondents developing their own film.

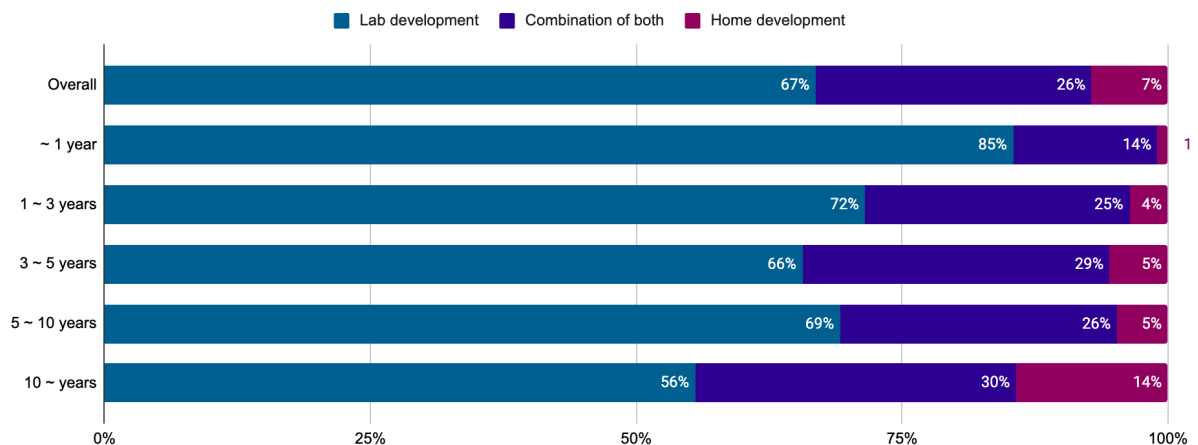


Figure 11: Film development method, by years of experience

#### 4-10. Demographic

The demographics of the survey participants are as follows. Figures in parentheses are percentages of the total.

- Total number of participants: 802

##### Years of film photography experience

- ~1 year: 108 (13.5%)
- 1~3 years: 166 (20.7%)
- 3~5 years: 129 (16.1%)
- 5~10 years: 146 (18.2%)
- 10~ years: 253 (31.5%)

##### Region of residence<sup>2</sup>

- Kanto: 453 (56.5%)
- Kinki: 128 (16.0%)
- Chubu: 76 (9.5%)

<sup>2</sup> Surveys commonly categorize the Japanese population into seven residential regions. The Kanto region, which includes Tokyo, is the most populous, followed by the Kinki region, home to cities such as Osaka and Kyoto.

- Kyushu & Okinawa: 39 (4.9%)
- Hokkaido: 30 (3.7%)
- Tohoku: 28 (3.5%)
- Shikoku: 10 (1.2%)
- Overseas: 11 (1.4%)

#### Age group

- 10s: 44 (5.5%)
- 20s: 207 (25.8%)
- 30s: 203 (25.3%)
- 40s: 133 (16.6%)
- 50s: 154 (19.2%)
- 60s: 45 (5.6%)
- 70s: 16 (2.0%)

## 5. Key insights

### 5-1. Cost concerns apparent throughout the customer journey

Cost was the most frequently cited reason for the decrease in the use of film. A closer look at the open-ended responses reveals concerns about increased costs not only for the price of film, but also for the entire ecosystem surrounding film, including developing and camera repair.

The most common comment was the rising price of the film itself. A factor that has a major impact on film prices is the price of silver, the raw material. According to Mitsubishi Materials, a Japanese materials trading company, the price of silver has risen about six-fold between 2000 and 2024<sup>3</sup>. Other film production businesses are currently facing cost increases on many fronts, such as rising energy prices and inflation. In addition, Kodak is expected to restrict the sale of motion picture film by resale<sup>4</sup>. Due to these external conditions, it is unlikely that film prices will continue to fall significantly in 2025. On the other hand, there is information that Fujifilm has restarted a color film production line in China in 2024.

Many other respondents mentioned that the cost of “developing and scanning” was a burden. A number of film developing labs in Japan are closing or shutting down one after another, and it is possible that the balance between demand and supply of developing services is shifting. At the same time, labs are still relying on older generation developing equipment that is no longer supported, and the future of the developing business in Japan is uncertain. Some foreign manufacturers have announced the development of developing and scanning equipment, but many are still in the development stage, and it will likely be at least several years before new equipment has enough of an impact on the entire film photography ecosystem.

What emerges from the survey is the reality that although film photography has deep-rooted popularity and demand, the entire film photography ecosystem is under strong pressure from increasing costs. Even under these circumstances, it is encouraging to see that 30% of respondents have “increased” the frequency of film use in the last year. Looking at the open-ended responses, we see ingenious ways to enjoy film photography while keeping costs down, such as by using bulk rolls and expired film, and developing film at home.

### 5-2. New models is a bright hope to the ecosystem

Many of the comments referred to new models announced and released in 2024, such as the Pentax 17 and the Rollei 35AF. Comments were generally positive, with the majority of respondents stating that the new cameras are “dependable” and that the new cameras have increased their opportunities to use film. On the other hand, there were also comments expressing hope for the release of film cameras from other major manufacturers, as well as requests for the reissue of film cameras that are no longer in production at this time.

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<sup>3</sup> <https://gold.mmc.co.jp/market/silver-price/>

<sup>4</sup> <https://www.film-photo.net/articles/kodak-limits-respooling>

We have received several reports that new film cameras will be released in 2025. The launch of a new film camera has news value in itself, giving users a sense of security that film is a culture that will not disappear in the near future. On the other hand, at present, we have not heard any information about the launch of new film cameras from major brands other than Pentax (with the exception of Fujifilm's "Instax" series). If brands such as Nikon, Canon, and Fujifilm reenter the film camera market following Pentax, it may be possible to stimulate a lot of demand.

### **5-3. Film photography as digital detox**

Younger generations are more likely to like film photography because it provides an opportunity to "get away from digital", as 34% of respondents in their teens and 24% of respondents in their 20s did, suggesting that film photography may be accepted as a method of "digital detox" among this group. This may indicate that film photography is an accepted method of "digital detoxification" among this demographic.

Turning to cultures other than film photography, there is a growing reevaluation of analog methods in the world of music, including analog records and cassette tapes. In particular, for analog records, sales surpassed CDs in the U.S. in 2020, making them an "old and new" source of income for artists<sup>5</sup>.

On the other hand, "retro digital cameras" have been gaining attention, lagging behind the film camera trend by several years. The "Heisei<sup>6</sup> retro" design of the camera body, the quality of the photos that can only be achieved with a CCD sensor from a generation ago, and the fact that the camera has only one function, photography, as opposed to the versatility of a smartphone, have all been highly evaluated as fresh. This trend is considered to originate from TikTok, but it will be interesting to see how this "digital camera" trend will be accepted by the segment of the population that wants to distance themselves from the digital world.

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<sup>5</sup> <https://rp.kddi-research.jp/atelier/column/archives/5040>

<sup>6</sup> "Heisei" refers to the Japanese era name (nengō) that lasted from 1989 to 2019. Era names are used in Japan to mark periods of an emperor's reign and are commonly used in official documents, calendars, and cultural references.

## 6. About the author



Survey designed & conducted by: Kimiyasu Morikawa

After working as a startup CTO and at a strategic consulting firm in Tokyo, Kimi currently resides in the US, enrolled in a Master's program in Computer Science at Georgia Institute of Technology. His current interest is developing a software platform to enhance productivity in film labs, utilizing his experience in software development. He holds a B.A. in Political Science and Economics from Waseda University, and he operates FilmFocus, a Japanese information website about film photography.

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