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Wednesday, 22 June 2011

Minority Report

By **Ctein**

Amidst the discussions a few weeks back of film and digital photographic practices, it occurred to me that it's much harder for me to get numbers today on the kinds of photographs photographers are making than it used to be.

In the film era, having friends and informants at the Big Three in filmmaking was entirely sufficient. Those companies accounted for over 90% of all photographs being made, and they could readily tell me what percentage of photographs were slides, B&W negatives, color negatives, 35mm, 8x10, you name it.

Understand that they were not always inclined to do so. Mostly I do not have detailed information. But I had a few data points and I could be confident of their accuracy. That's more than I can say now.

For example, between 1980 and 2000 almost every photograph made was on color negative film. In the early 1980s, Kodak told me that 90% of its still film sales were for a single emulsion in a single size: Kodacolor II, 35mm. This was shortly before the huge explosion in film varieties brought on by novel silver halide structures such as T-grain and new chemical tricks like DIR couplers. The market then fragmented into many subcategories. In the early 1980s, each film manufacturer made only a few emulsions of each subtype of film, and so it was possible for one single film to completely dominate a company's sales.

Altogether, all kinds and all formats, color negative photography accounted for perhaps 97–98% of photography during a 20-year span. That's pretty astonishing. I didn't get clarification on whether "film sales" meant dollar volumes, number of rolls, or number of photographs. Doesn't much matter. No matter how you parse it, the evidence is overwhelming that everything besides small format color negative had to be counted in the single-digit percentages. All the slide film in use? One percent. Give or take. All the black-and-white film in use? Ditto.

That says nothing about either the commercial or aesthetic import of the photographs made on those materials. That turns out to be important.

As I mentioned in a previous comment, the medium format film market collapsed well before the rest of the film business. The bulk of medium format film went into portraiture, with the second most popular use being weddings. Thirty-five millimeter had seriously eroded the medium-format wedding market by the end of the '90s. The major portrait makers jumped onto the digital bandwagon in the 1990s, because they could make effective use of the ultra-expensive cameras of the era. Were it not for the prestige of medium format it simply would have disappeared from the marketplace. Much for the same reasons that, based on market considerations, Kodachrome should have disappeared 15 years ago—there were an insignificant number of Kodachrome users in the total scheme of things. Fortunately, for the lovers of those particular media, those were users that the film and camera manufacturers courted assiduously. But, again, that wasn't about the sales numbers.

Today, it's much harder to make assertive statements about what kind of photographs photographers are making or would like to make in the future. Digital photography doesn't leave tracks in the snow. Once the camera and memory card makers have sold their wares, there's no way to easily track what photographers are doing with them. One can try to apply guesswork and intuition to the problem, but I'll wager that most of you readers were surprised by the film statistics I just ran out. Reality is not obligated to conform to intuition, no matter how well educated that intution may be.

Even Mike's TOP polls are not particularly helpful. In the best of those, maybe 10% of the readership responds, a phenomenal response rate but no indicator of whether or not it's representative of the silent 90% majority. It's especially difficult to extrapolate from that when you're concerned with the important minorities: those still using film, those working in black-and-white, etc. Even in this abnormal assemblage, those percentages will be small enough that separating them out from the noise is tricky and assuring that your polling is representative even trickier. Sociologists long time ago worked out ways to ensure the accuracy of self-reporting polls, but it's not easy.

With the 40-fold shrinkage in the film business, it would be most interesting to learn if the aforedescribed pattern of film usage has changed much. Is it still 95+ percent color negative, with all subcategories equally diminished in absolute number? Or has the very flavor of the use changed? Are film photographers now the cream skimmed off the top of the milk...or the sedimentary dregs at the bottom of the wine bottle? Or do they distribute themselves pretty much as they always did but in fractional numbers of old? I'd love to know.

PORTALS

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SEARCH

Google

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CATEGORIES

Around the Web (220)
Baker's Dozen (50)
Blog Notes (564)
Bon Mots (10)
Book of the Week (15)
Books (521)
Camera Reviews (138)
Cameras, new (779)
Cameras, old (255)
Carl Weese (23)
Collecting (53)
Computers (91)
Ctein (370)
Digital Techniques (72)
Eamon Hickey (2)
Editing and Portfolios (75)
Exhibits (84)
Film and Darkroom (127)
Followups (147)
From the Archives (38)
Geoff Wittig (2)
Gordon Lewis (15)
Interviews (7)
Jim Hughes (31)
John Camp (8)
John Kennerdell (17)
Ken Tanaka (11)
Kirk Tuck (8)
Legal and social issues (112)
Lenses (316)
Mini-Portfolios (5)
Morning Coffee (32)
Music Notes (106)
News and Occasions (474)
Obituaries (81)
Off-topic posts (489)
Open Mike (337)
Oren Grad (1)
Past Blasts (23)
Peter Turnley (66)
Photo equipment (343)
Photo industry (169)
Photo-tech (221)
Photographers, current (240)
Photographers, historical (163)
Photographic aesthetics (219)
Photography businesses (26)
Photojournalism (85)
Polls (16)
Print Offers (261)
Printers and Printing (169)
Quote o' the Day (95)
Random Excellence (246)
Random Snaps (123)
Reader Prints (7)
Recommended Cameras (14)

Unfortunately my inside contacts in the film manufacturers have long moved on and I haven't bothered to cultivate new ones. If any of you have real insider information on how the film market currently breaks down, and wouldn't mind discussing that in public, please write.

Ctein

Ctein's regular weekly column appears on TOP on Wednesdays.

Featured Comment by **Tom Kwas:** "Interesting to note, and I've posted this before, in the mid-1970s, our studio Kodak TSR was trying to get us to shoot 8x10 and 4x5 color neg, because we were 'just lucky' Kodak still made transparency and could pull production any day. Of course, the pre-press and separation houses didn't like it and everything they separated from it looked flat, soft (as in film sharpness), and soft (as in color reproduction); plus, they had to make too many color decisions, whereas with transparency, they just had to match the film (which they had trouble doing anyway).

"...We never seriously considered it, but it's notable that Kodak was already acknowledging back then that they made far more color neg than transparency and it seemed that they were trying to set the stage for reducing production of certain lines. Guess they were just asking for Fuji to come in and hand them their hats by pushing their color transparency, and at the time, a far more stable emulsion that didn't have to be tested batch to batch either....

"Sorry to hear that 120 is practically a ghost town. When I look back on years of shooting, if I had to keep one film format that I've done the best work with overall, it would be 120. While I think 4x5 has the best overage usage by discipline (you can use it for product/people/architecture), the 120 format certainly excels when it comes to getting the right look, feeling, and expression in portraiture combined with having the best film size for quality while getting those expressions.

"After I got into photo management, I thought I could do everything I wanted to do from an 'artistic' standpoint by just shooting 8x10 film. Arguably it could do everything from portraiture to architecture, and I could actually ditch the darkroom and do everything with a few trays, a printing frame, and an overhead light. Trying to take pictures quickly 'on-the-fly' outdoors, cured me of that thinking pronto.

"What I've realized, is that their are two levels of hell for film users: will my preferred film format and preferred films still be made (and for how long)? ...And, will the ancillary services associated with film shooting be available to me in my town? ...Or, at a reasonable rate/time? I live in a city of a million in the metro area, and I can't even get same day E-6 processing done on a professional level, much less the old 90 minute 'usual.'

"What *will* be the last standing film format? Or at least, the last film format with the most options?"

Posted on Wednesday, 22 June 2011 at 03:14 PM in Ctein, Film and Darkroom | Permalink

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Comments

Slide film vs color negative in the 1980's = flickr vs facebook in 2011. 55 billion vs 5 billion? And who posts anything worth anything on facebook? Flickr is no snobby art haven either, but at least the site caters well enough to accomplished photobugs that it attracts and serves all types.

Fifty. Five. Billion. Thats a LOT of blurry, grainy, improperly exposed, nasty looking cell phone pictures of absolutely nothing.

If you dont exclude that stinking pile from the numbers, what good are any of your statistics going to be, anyway? Its like understanding the enthusiast racecar market by analysing barrels of oil consumed, or by the number of chevy impalas sold.

Posted by: ILTim | Wednesday, 22 June 2011 at 03:50 PM

Dear ILTim,

Who said I cared about "enthusiast racecars?" I didn't. I don't.

I'm interested in what people are doing, photographically. Not in what they're doing that someone arbitrarily deems important.

pax / Ctein

Posted by: ctein | Wednesday, 22 June 2011 at 05:14 PM

ILTim:

I spent most of the '80s in the photofinishing biz for a large Canadian camera store chain, and by the time I left, I felt like I had looked at 55 billion blurry, overexposed pictures of people's fingers in front of the lens. Nothing really changes.

Reflections (198)
Reruns (21)
Roger Overall (2)
Sarge (1)
Satire Alert! (25)
Shooting Skills and Camera Handling (6)
Shooting techniques (157)
Software (75)
Sunday Support Group (73)
TOP contests (6)
TOP's Own Books (10)
Visual Culture (270)
Websites and links (141)
Weekend Exercises (5)
Workshops (19)
Your Turn (9)

ARCHIVES

December 2023
November 2023
October 2023
September 2023
August 2023
July 2023
June 2023
May 2023
April 2023
March 2023
More...

But thanks for bringing up Flickr et. al. While we have no idea how representative a sample the 'social media' sites are w.r.t. picture-taking as a whole (3%? 60%?) they sure do represent *something* large. Some analysis of their vast databases might tell us something about the market e.g., % of pictures taken with film, then scanned (either by photofinisher or home equipment). Or whether Thom Hogan's prediction w.r.t. the takeover by cell phone cameras for 95% of general snapshooting (I paraphrase somewhat) is on track.

Posted by: Dutch Canuck | Wednesday, 22 June 2011 at 05:44 PM

ctein:

Do you have any sense of what the trends in 'alternative' (chemical) photography are? Both the various individual processes and the number of practioners?

Posted by: Denise Ross | Wednesday, 22 June 2011 at 07:15 PM

Ctein, you might want to take a look at the camera statistics on Flickr.

http://www.flickr.com/cameras/

You'll have to look around by camera make, but it can give you some ideas of what is being used, and how much by each model. There may be a way to compile all this programatically via their API, but I'm not a programmer. Might be an interesting project for someone with your interest in what's being used over time.

Posted by: David | Wednesday, 22 June 2011 at 07:17 PM

Creme?
Dregs?
We should have a poll for us poor remaining film users.
By the way, there may be dregs at the bottom of my developer but the wine I buy does not get a chance or is of a vintage to have dregs.

Posted by: john robison | Wednesday, 22 June 2011 at 07:42 PM

"*Fifty. Five. Billion. Thats a LOT of blurry, grainy, improperly exposed, nasty looking cell phone pictures of absolutely nothing.*"

Well, what is "absolutely nothing" to one is "wonderfully something" to another!

My brother and I were in Yosemite National Park recently, and we saw cameras from MF digital backs, Leica digital, DSLR, compacts, cellphones, and ... throwaways!

We remarked how great it is that there is such a wide range of means by which people can capture their memories, with no concern for another's opinion of their equipment nor the quality of their photographs.

And, why not?!

Regards,

Richard

Posted by: Richard | Wednesday, 22 June 2011 at 07:50 PM

Dear Denise,

Sorry, but I have not a clue. Even in my own specialty, dye transfer, I've not known how many practitioners there were. Today, when it's a very small number, and a high percentage of them are in communication with each other, estimates still vary by a factor of four (low double-digits to perhaps 100 -- I favor the former).

pax / Ctein

Posted by: ctein | Wednesday, 22 June 2011 at 08:18 PM

@Richard, you said:

"We remarked how great it is that there is such a wide range of means by which people can capture their memories, with no concern for another's opinion of their equipment nor the quality of their photographs."

Could not agree more.

Posted by: Steve Jacob | Wednesday, 22 June 2011 at 09:26 PM

My thoroughly unscientific observations on Flickr suggest that 35mm is in the majority, but not by a huge margin like it used to be before the consumer market mostly moved to digital. I would suspect a lot of people who are now into film appreciate what MF can do for them and can afford the gear now that it's available used for pennies on the dollar.

By the same unscientific observations color negative is also in the majority, but B&W and slide share decent percentages.

Speaking personally I've mostly shot color neg in 35mm so far but lately I've been drifting more toward B&W, slides and medium format.

Posted by: Paul Glover | Wednesday, 22 June 2011 at 09:47 PM

I had a roll of 120mm Velvia developed (and yes applause 9 usable positives :-)) and got them back the other day. My envelope was easyly traceble. The only green Fuji envelope between all the rest of the yellow envelopes of negative film. And the rest was a good 100 envelopes. My local photographer stacks up on 35 mm negative color (mostly Superia and stuff like that) and some Ilford black and white. Now that is a typical line up. But I guess a phone call to B&H Photo (and it's competitors could help). Personally I think color negative will be the dominant factor now as it has always has been. Easy to handle, large exposure compensating capabilities. Fit for the shooter and the enthousiast as well. Slide was always a niche market. I guess slide films have not caved in as much though as negative film. Slide films are rare, were rare and will be rare in the future, but since competition is limited I guess Fuji will still be able to sell them profitably into the future (probably at a higher price then the rediculous 8 euro per developed 120mm film they charge me today).

Greetings, Ed

Posted by: Ed | Thursday, 23 June 2011 at 01:40 AM

Ctein, fair enough. And I suppose the mass trends drive all aspects of photography to some extent. The extremes are easily identified, cell phones vs medium format backs, 110 cassette film vs 4x5 sheet. There is no crossover between the extremes, they are distinctly separate markets with equipment marketed specifically to that subset of users, regardless if there is 15 billion customers on one side and 100,000 on the other.

But it gets weird in the middle, where the extremely casual photographer with a little extra cash to burn wants to buy something 'more good-er', or the accomplished hobbyist or pro wants something smaller or more autonomous. It can be a funny area where 90% of sales of a particular model are to people who cannot set the aperture value, but 10% can and want to.

Thats where I fall with my Panasonic GF1 and the progression of that model line lets me down a little. Its like watching good cheap enthusiast cars become overweight and porky because they need more cushy sales brochure features. So anyway, thats the background of why my comment takes the shape it does, my perspective or interest in these figures is a bit different.

Posted by: ILTim | Thursday, 23 June 2011 at 08:44 AM

I disagree Ctein, that information can be collected in metadata, whether it be EXIF or in the page which the image is published on. Even assuming that a small percentage of all photos are published online, this would still be a good enough base to work out:
- when the photo was taken: time of day (not possible with film)
- what camera used (not possible with film)
- what focal length used (not possible with film)
- ... and perhaps a couple of other things too!

So I think that this would be a question for Yahoo/Flickr or Google/Picasa no? I think somewhere in there is a good idea for a future Google product though.

Pak

Posted by: Pak-Ming Wan | Thursday, 23 June 2011 at 09:53 AM

Richard:
'My brother and I were in Yosemite National Park recently, and we saw cameras from MF digital backs, Leica digital, DSLR, compacts, cellphones, and ... throwaways!

We remarked how great it is that there is such a wide range of means by which people can capture their memories [...]'

Considering that wide range of means, how about people drawing or painting - did you see any of those? Lately I've come to thinking that the world wide family of image makers should include them as well. What I mean, really, is that we (photographers and other artists working figuratively) are truly related. It is not in the tools.

Posted by: Hans Muus | Thursday, 23 June 2011 at 10:48 AM

"Are film photographers now the cream skimmed off the top of the milk...or the sedimentary dregs at the bottom of the wine bottle?"

Why such polarised hyperbole? I suspect the spectrum is still varied.

Adding my own experience - in the 60's I shot B+W film - because I grew up in a darkroom and probably didn't know there was anything else. 70's 80's and 90's slide film because a projected transparency, or even one viewed on a little plastic battery powered viewer was a pulsing vibrant image compared to a colour print. And my darkroom had disappeared..... and printing was ... just too much bother.

2000 - present, equal quantities of B+W, transparency and colour negative. Why? I'm afraid to say I now scan and digitally print everything - so that makes a level playing field, and I use the emulsion to suit my mood, whim or subject....

As an aside, from 2000 onwards I started with digital (earlier actually if I count my first Sony DSC-1) but the crucial development was digital printing. That took me back to film, ironically

Posted by: LM | Thursday, 23 June 2011 at 01:55 PM

Well, for those who still prefer to make their own prints in darkrooms, I wouldn't be surprised if there's been a shift from colour to B&W simply because it's getting harder in many areas to access colour supplies, even by mailorder. As the crow flies, my B&W supplies travel 3000 miles across an international border. Colour? It's no longer feasible.

Posted by: latent image | Thursday, 23 June 2011 at 03:00 PM

Dear LM,

Because it amused me to write that.

Both a necessary and sufficient condition.

If it did not amuse you, better luck next time. I am a repeat offender.

~~~~~~~~

Dear Pak,

Unfortunately, that only gives you statistics on the highly-self-selected subset of photographers who uploaded *some* of their photos to those sites.

Unless one has some strong evidence that this subset is representative of photography as a whole, it offers no useful statistics directed at my questions.

pax / Ctein

Posted by: ctein | Thursday, 23 June 2011 at 03:17 PM

Hans Muus wrote (concerning my Yosemite trip)

Considering that wide range of means, how about people drawing or painting - did you see any of those? Lately I've come to thinking that the world wide family of image makers should include them as well.

Yes indeed! I spoke with several people who brought portable chairs and easels, set up along the trails in the meadows, and along the Merced River. One in particular comes almost every month to draw/paint! One gentleman who lives near the park comes quite frequently with no camera -- just to enjoy and come away with many memories tucked inside. I'm sure his recollection of scenes (images) is no less significant or important than those who capture those same scenes on some type of media.

Again, Hans:

What I mean, really, is that we (photographers and other artists working figuratively) are truly related. It is not in the tools.

And what about those who transfer their visual memories into poetry or prose!

See:

http://www.restorecalifornia.net/yosemite-poetry.html

http://www.restorecalifornia.net/yosemite%20haiku.html

Regards,

Richard

Posted by: Richard | Friday, 24 June 2011 at 12:54 AM

"Thirty-five millimeter had seriously eroded the medium-format wedding market by the end of the '90s.The major portrait makers jumped onto the digital bandwagon in the 1990s, because they could make effective use of the ultra-expensive cameras of the era. Were it not for the prestige of medium format it simply would have disappeared from the marketplace. "

I can't find anything credible to back up these statements.
If 35mm film had seriously eroded the MF market, and (MF) "portrait makers" jumped to digital in the 90's as well, why was there not more (low priced) used MF equipment on the market at that time? The bottom didn't drop out on MF equipment until 2004/2005.

My experience during the 90s-00s: Editorial & commercial "portrait makers" were primarily shooting MF, some still using LF. Today there are still some of the top photographers in these sectors using film - MF & LF.

While there were a few wedding photographers turning to 35mm film, most worked with MF (Hassys) until digital was decent: Fujifilm FinePix S2/S3 Pro & Canon 10D. It took several years after these cameras were on the market and in use before the majority of image makers hit the tipping point and switched. This tipping point change resulted in the huge supply of used MF (fire sale prices) equipment.

Digital capture in the 90's was nowhere close to the quality of MF film - especially for skin tones in portraiture. Even today, color film often looks more natural with skin tones than most dslrs (including portraits from some digital backs).

Color negative is still a great medium, but it scans much nosier than trannies - requiring larger formats: MF - 8x10 to print good quality enlargements.

Posted by: Scott Lightner | Friday, 24 June 2011 at 02:44 AM

Dear Scott,

My medium format sales information came from a high level official at one of the major film manufacturers who was in precisely the position to know just what the film business, industry-wide was doing.
~~~~~~~~

I won't give name or company, because I have no idea how much in confidence I was being provided with that information. I do know that information was being provided entirely in good faith and with as much accuracy as said official could muster over a dinner conversation.

You'd be making a good case if I didn't have such primary sources for my statements. Given that, though, I consider them more reliable than your circumstantial arguments.

pax / Ctein

Posted by: ctein | Friday, 24 June 2011 at 04:00 PM

Dear Ctein,

A single (manufacturer) source is not the only source for accurate information during the period of time in question. There are a number of other sources which describe the industry. These are no more circumstantial than your single source:

-Lab sales/production #s
-Equipment sales
-Used equipment sales - supply #s, prices
-Associations & organizations (ASMP, PPA, APA, AOP, etc.)
- Publications
-Publications and contests from photographers Ass. & Orgs.
-Online
-Sourcebooks
-Annuals (CA, Archive, Graphis, etc.)
-Stock agencies (Getty greatly preferred MF film, I believe the first DSLR images they would accept were from the 1Ds - 2003)
- The health of all these businesses.
- Production models
- Dates of discontinued models (Fuji GX680 - 2007, Kyocera/Contax -2005, Rollei 6003 Professional - 1996–2003)

Keep in mind during the period in question, there was a collapse of the economy across most of Asia, the dot com bust, 9/11. If MF film was not selling, this does not mean these sectors switched to digital or 35mm - at that time.

My empirical data is sourced from the commercial industries in L.A., N.Y.C, S.F., Singapore, and Japan. In commercial, corporate, advertising, and editorial almost everyone was still shooting film - a majority being transparency. Fashion was mostly transparency too until the late 90s. There was an occasional large still product studio that may have gone to the 3 pass 4x5 backs, for catalog work.

Commercial wedding photographers in large part went from Hassys straight to digital. There was an occasional (commercial) wedding photographer shooting 35mm. But big print enlargements were still very popular in the 90's. The big wedding and family portrait studios existed to deliver quality and sell prints. The business model at the time was primarily around selling as many prints and albums as possible. Quality was important, MF delivered that quality. Smaller enlargements became more popular in the 00's when reportage became vogue in wedding photography. Even into the early 00's brides still were asking for negs - not files. Most of the wedding magazines and online articles at the time referenced film - not digital.

Posted by: Scott Lightner | Saturday, 25 June 2011 at 12:22 AM

Dear Scott,

Thanks for making my point more clearly: applying inferential logic and intuition to the question doesn't necessarily produce the results one gets by being able to go directly to the source.

pax / Ctein

Posted by: ctein | Saturday, 25 June 2011 at 05:49 PM

Who cares - and I mean that respectfully :-)

I also worked commercial photofinishing for about a decade and I blame the slow demise of medium format on newer / younger photogs choosing the convenience of 35mm over the hassle of MF. The quality difference was staggering, especially when you hand print and analyze several thousand rolls of film a week. No 35mm print film in existence can produce a 16x20 analog print like 6x7 can. However, brides and photographers started shifting to a different market starting in the mid 90's. The landscape / commercial market was more more specialized on chrome film and has been dictated by their printing needs. Given that nobody buys newspapers and magazines anymore...ahem.

Lab die-offs are of course responsible for a self supporting cycle of diminishing interest in MF. The fact is that with B&W you are obligated to process it yourself, and E-6 is still better controlled with one-shot hand processing, especially if you're using Fuji materials which simply don't workin in Kodak calibrated lines, which most are. Why you'd even bother with print film, professional or otherwise, unless you're shooting a wedding dress is beyond me.

Posted by: Scott Eaton | Wednesday, 06 July 2011 at 09:47 AM

The comments to this entry are closed.