

# **D.I.S. Consulting**

C O R P O R A T I O N

*Publishing syndicated market research surveys in media technology markets since 1982*

## ***3D Production World™ 2010***

**Publication Date: September 2010**

### **General Overview:**

*3D Production World™ 2010 Equipment* is intended to be the most comprehensive syndicated market research survey ever conducted regarding these products, in the world. The global market for production and post-production tools in the hands of end-users for 3D will be surveyed, census style, in this new global “bottoms-up” effort.

### **Market Sectors covered Include:**

- 1) Broadcast TV & Cable stations, groups and networks,
- 2) Production and Post Service Providers and Studio Production Facilities and Freelancers
- 3) Mobile/OB
- 4) Institutional (Government, Education, Religious, Medical & Corporate)
- 5) Equipment Rental Houses

In late summer of 2010, we will publish the comprehensive report, showing all results in Total (all sub-markets) and one report each for the four (4) major geographic regions (USA, EMEA, Asia-Pacific and the Americas). Those reports will be modularly available for purchase. The Survey Covers 9 (or more) Genre of 3D production/post oriented products, including:

### **A total of 9 product genre will be covered in this survey:**

- 3D Camera Rigs
- 3D Cameras
- 3D Camcorders
- 3D Processors
- 3D Stereographic Graphic Systems
- 3D Displays & Monitors
- 3D Editing Systems
- 3D Encoders / Decoders / Trans-coders
- 3D Switchers / Master / Routers

### **Key Issues:**

- The need for purpose-built 3D gear versus re-purposed HD gear
- The adoption curve over ten years
- How much consumer (home viewer) demand will affect sales
- How much 3D programming can be converted from 2D and how
- Creating matching audio that fits the 3D video
- Integrating different workflow elements
- Standards battles, protocols and political disputes

**Deliverables:**

The sponsors receive a CD-ROM copy of the survey results for those regions they have sponsored and/or for the global totals if they have sponsored the survey on a global level. Our new style of report now features more analysis, more section summaries and less pages of unneeded detail. There is even a 'leaders summary' that provides an easy to absorb view to your senior executives.

**Sample Frame and Lists Sourced:**

The *3D Production World™ 2010* project uses a list of stations and facilities culled from IBC, the NAB Show, and Broadcast Asia. We target chief engineers or the equivalent senior technology executive at stations.

1. USA                      2. EMEA                      3. Asia                      4. The Americas

Vertical Market	United States	EMEA	Asia	Americas	
<b>Broadcast/TV Stations</b>	100	95	85	60	340
<b>Production/Post/Freelance</b>	90	80	70	50	290
<b>Mobile/OB</b>	80	65	55	40	240
<b>Institutional</b>	60	50	30	30	170
<b>Equipment Rental Houses</b>	60	50	30	20	
<b>Total User Markets</b>	390	340	270	200	1,200

<b>Lists by Region and Marketplace</b>				
Markets	USA	EMEA	ASIA	AMERICAS
<b>Broadcast &amp; TV Cable Stations</b>	NAB/SMPTE Broadcasting & Cable Ybk RTNDA	NAB/IBC/Kemps World Guide to Film & TV RTS	BA/IBC/NAB ABU/SMPTE World Guide	NAB/IBC World Guide Film & TV Set/Caper
<b>Production/Post/ Freelance</b>	NAB/SMPTE Yellow Pages	NAB/IBC/Kemps Sonovision	BA/IBC/NAB Kemps, etc.	NAB/IBC Set/Caper
<b>Mobile/OB</b>	NAB/SMPTE Yellow Pages	NAB/IBC/Kemps Sonovision	BA/IBC/NAB Kemps	NAB/IBC, Caper/Set
<b>Institutional Facilities (Government, Medical, Corporate, Education, Religious)</b>	NAB/SMPTE Yellow Pages	NAB/IBC/Kemps Sonovision	BA/IBC/NAB Kemps etc.	NAB/IBC Set/Caper
<b>Equipment Rental</b>	NAB/SMPTE Yellow Pages	NAB/IBC/Kemps Sonovision	BA/IBC/NAB Kemps, etc.	NAB/IBC Set/Caper

## Report Table of Contents

### FRONT MATTER:

Cover & Spines  
Introduction & Methodology  
Staff Page  
Project Staff  
Executive Summary  
Industry 5-Year Forecasts  
Leader's Summary

### GENERAL REPORT:

Type of business  
Size of operation  
Leading Applications such as: News, Archive, Documentary, Sports, Movies, TV Programs, etc.,  
Size of Budget  
Budget Increasing, decreasing or remaining the same  
Size of Revenues  
Revenues increasing, decreasing or remaining the same  
Type of major 3D workflow applications  
Number of employees  
Number of staff having access to 3D gear  
Extent of purchase authority  
Comparable ranking  
Type of station or facility

### TECHNOLOGY TRENDS:

Type of 3D workflow utilized, pecking order of component systems therein  
Categorized flows and who uses them most  
Order in which major equipment is deployed  
Type of editing applications within chain  
Departments responsible for major systems  
Workflow patterns flow-charted  
MPEG orientation and IP issues  
HD re-purposed versus purpose built 3D  
Compression use  
Computer platforms used  
Year of first 3D system purchase  
Year of latest 3D system purchase  
Troublesome problems such as crashes, snags  
Firewalls and security issues  
Summary of key features of systems  
Number and types of drives or servers  
3D software used  
Other systems that news systems integrate with  
Future storage technology preferences  
Other additional workflow issues

### MAGAZINES & TRADE SHOWS:

Trade Magazines read and preferred  
Single most valued  
Trade shows attended and planned  
Single most valued

### PRODUCT REPORT(S) – 3D Systems

#### By vertical market – by Genre – for each of the categories

Number of 3D Systems owned (installed)  
Number of units by brand  
Number of units by brand, type, and major application  
Value in dollars  
Number of units owned  
Number of units purchased in 2009  
Value in dollars/euro  
Number of units planned for 2010  
Value in dollars  
Long term prospects for sales – 5 year forecast

### BRAND IMAGE REPORT –

General criteria: Awareness and  
Brand Image Rankings of major brands of displays  
including:

- A) Price
- B) Awareness
- C) Quality
- D) Reliability
- E) After-sales-service

### 3D BRANDS TO BE INCLUDED -- But Not Limited To:

3ality Digital, 21<sup>st</sup> Century 3D, Abekas, Anachrome, Apple, Avid, ARRI, ATI, Autodesk, Adobe, Astro Design, Band Pro, BARCO, Behringer, Blackmagic, BLT, Bluefish 444, BARCO, BOXX, Brainstorm 3D, Canon, Carlson, Christie, Chyron, Cine-Tal, Cooke, Doremi, Dolby, DSC Laboratories, Logitech, Element Technica, EVS, Fast Forward, For-A, Fujinon, Grass Valley Group, Harris, Hamlet, HDLogic, Ikegami, IRIDAS, LG, Leader Instruments, Lucid Dream, JVC, Mark Roberts, NHK-3D, NVidia, NTT, Maxon, Miranda, Omneon, P & S Technic, Pace, Panasonic, Pixel Arcana, Polecam, Prime Focus, Quantel, Quasar, Ross Video, Samsung, Schneider Optics, Snell, Sony, Teranex, T-VIPs, TV-Logic, Thales-Angenieux, Viewsonic, Vizrt, XDT, X-Pan D, ZGC, etc.

Final brand lists will be reflected in the on-line questionnaire at field time

## **Format of Reporting Data:**

Summary tables, color Excel charts, graphs and the written summary section show both quantitative and qualitative results in each section or product category. Tables show full corporate results and regional information for all survey questions and the entire research report is delivered on a CD Rom. Three types of reports are available:

### **1. 3D PRODUCT REPORTS**

- 3D product categories and related production/post processing technology and workflow aspects will be surveyed
- Unit and market value data
- Brand and leading model market shares
- Installed base (owned)
- Purchases in the past 12 months and value
- Plans to buy in the next 12 months and value
- Prospects for out years (5-year forecasts)
- Custom reports available (cross-tabulation)

### **2. GENERAL MARKETING & MEDIA**

- Trends relating to the overall state-of-the industry
- Equipment budgets and buying habits
- Demographics
- New Technologies, applications and trends, such as IP, Cloud,
- Applications planned/used for News, Movies, Sports, TV Programs, Documentaries, Weather, Maps, 3D Medical Imaging, etc.
- Trade magazine readership and trade show attendance and preference

### **3. BRAND IMAGE**

- Brand image ratings for pre-fielded, front-end sponsors only (all leading 3D brands)
- Designed to assist companies identify and leverage market positioning, and brand share
- Key marketing performance attributes including: Product reliability, after-sales-service, price and quality
- Ratings compared by brand, and by each factor, as well as by overall composite brand image. All charts also show the industry average

## **Methodology:**

As in previous years, D.I.S. has consulted with all of its front-end sponsors as well as with those companies not sponsoring the survey, in the effort to be as comprehensive reading brands and models as well as salient and accurate technology trends gathering. Clients were extremely helpful in aiding in the design of the questionnaire...and in recommending improvements to the process.

We invite professionals to the website and collect their individual product data using where the responses entered as they were gathered into the relational on-line database. Up to date e-mailing lists are used including the freshest (international) NAB attendee list, the similar IBC list (also international) as well as numerous other industry sourced mailing lists like Kemps International. All of them are also merged together to form an e-mail list for domestic and international solicitations

## **INCENTIVES:**

Survey respondents will receive a copy of the latest [NAB/D.I.S. Broadcasting, Audio & Video Global Industry Trends Report for](#) their help, estimated to be worth \$450 USD to them.

**Clients Provide Inputs to Questionnaire and Report Format and Design:**

The questionnaire is designed to inventory installed brands and models, and stations, by product category. Data entry and computer tabulation is then done using a network of personal computers running the proprietary tabulation program. Microsoft Excel™ is used for the spreadsheets (tabs) and analysis is written in MS Word. A variety of color charts and graphs are provided, taken directly from the Excel spreadsheets. At the end of the project, clients receive a CD-ROM of all the data.

**STAFF EXPERIENCE:**

D.I.S. Consulting Corporation maintains seven regular staff and utilizes a project staff of seven others on its syndicated projects. This core research group is augmented by the use of other freelancers, as appropriate, for the individual projects undertaken.



**Overall Design:**

The design of *3D Production World™ 2010* is based on other benchmark survey, and 39 years of experience that Douglas I. Sheer, D.I.S. Consulting Corporation's CEO, has had in a variety of marketing, publishing, advertising, consulting and research positions and, on the 29-year record his firm D.I.S. Consulting Corporation has had in conducting custom, large-scale multi-client and proprietary end-user and dealer market research in professional imaging and communications in the United States and Europe since 1982. In all, Sheer and his firm have served more than 1,400 industry clients.

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