

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

Professional Camcorder World™ 2012

To be published: July 2012

General Overview:

Professional Camcorder World™ 2012 is the sixth GLOBAL survey of professional camcorders and is seen as the most comprehensive, census-style syndicated market research survey ever conducted of these products globally. As in the recent past, this study organizes camcorders by sensor.

Markets Surveyed:

Seven sub-markets of professional audio end-users will be surveyed, globally.

- Broadcast, Cable Networks & Satellite Stations
- Production and Post-Production
- Mobile/Outside Broadcast
- Independent Film & Video Companies
- Event Videographers
- Institutional Facilities (Church, Government, Corporate, Medical and Educational).
- Equipment Rental Houses

World regions include:

- USA
- Europe
- Middle East/Africa)
- Asia-Pacific
- The Americas (including Central and South America and Canada).

The survey, in terms of product and market coverage, is far reaching and overall reporting detail focuses on those market segments of interest to the client, including installed base (number and type of camcorders owned), actual 2011 and actual/anticipated 2012 plans and a 5-year forecast of all sales. We will publish a comprehensive report, showing all results by type, sub-market and world regions surveyed. End-user data will be collected by phone, and augmented by questionnaires completed online. The data will be sorted and warehoused in an online database and analyzed and less unnecessary detail. There is even a 'leaders' summary' with key findings and an easy-to-read 'bird-eye view' made especially for senior executives.

Key Issues:

- Counting units by type/size of image sensors
- Now tracking 4/3-inch and 35mm
- Camcorders replacing studio cameras
- The rise of All-Digital Cinema and demise of film based production
- 4K and 8K models emerge
- DSLRs proliferate
- Disappearance of tape
- Competing formats and the proliferation of HD
- Plummeting prices are eroding manufacturer's profits
- 3D is challenging the dominance of pure HD
- Native recording increasingly ties field features to editing
- Build up of consumer 1080p demands higher quality recording
- Camcorders becoming 'agnostic' in that they universally permit multiple formats for recording in one body
- Maintaining rugged strength despite miniaturization
- News contribution from mobile phones
- Lowering power drain becoming important
- Use of wireless contribution

Deliverables:

The sponsors receive a CD-ROM and an electronic copy of the survey results for those regions they have sponsored and/or globally if they have purchased the survey in its entirety. Our new reporting style features more analysis, more salient section summaries. Separate sub-sections cover: Lenses, Batteries and Tripods, as associated by sensor type camcorder.

Recording Formats Covered:

AVC-HD, Mini-DV, HDV, HD-CAM, HD-CAM/SR, Mini Disk, HD CD, IMX, Iomega, DVCPRO/PRO50/PRO HD, DVCAM, BetaCam, Beta SP, Beta SX, Digital Beta, D6, DLT, DVD, P2 & Solid State Media, Prof Disk/XD Cam, Portable Hard Drives and other formats.

Sample Frame and Lists Sourced:

The *Professional Camcorder World™ 2012* 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 in the U. S., Europe, the Middle East, and Africa, Asia and the Americas.

The Market and Minimum Response Level Sought: 1,200 Respondents

This tracking survey covers four regions:

1. USA 2. Europe 3. MEA 4. Asia 5. The Americas

Market Segment & Regional Universe					<i>Responses Sought**</i>
Vertical Market	USA	Europe & M-EA	Asia	Americas	Global
Broadcast/Cable	95	60/30	70	60	315
Production/Post-Production	85	60/20	60	60	285
Mobile/OB	70	40/20	40	40	210
Ind. Film and & Video	50	25/15	40	20	150
Institutional Facilities	50	25/15	30	10	130
Equipment Rental	40	20/10	30	10	110
Total User Markets	390	230/110	270	200	1,200

Lists by Region and Marketplace				
Markets	USA	Europe/MEA	ASIA	AMERICAS
Broadcast/Cable	NAB/SMPTE Broadcasting & Cable Ybk RTNDA	NAB/IBC/Kemps World Guide to Film & TV RTNDA	BA/IBC/NAB ABU/SMPTE World Guide	NAB/IBC World Guide Film & TV Set/Caper
Production/Post-Prod	NAB/SMPTE O'Dwyers	IBC/Kemps Compass	BA/IBC/NAB Kemps, etc.	NAB/IBC Set/Caper
Mobile/OB	NAB/SMPTE Yellow Pages	NAB/IBC/Kemps Sonovision, etc.	BA/IBC/NAB Kemps/China & Japan guide	NAB/IBC guides SET/Caper
Ind. Film & Video	NAB/SMPTE O'Dwyers	IBC/Kemps Compass	BA/IBC/NAB Kemps, BIRTV,	NAB/IBC Set/Caper
Institutional	NAB/SMPTE Yellow Pages	NAB/IBC/Kemps /Sonovision etc.	BA/IBC/NAB/ Kemps/China Directory & Japan Guide	NAB/IBC SET/Caper
Equipment Rental	Broadcasting & Cable Ybk, RTNDA, SMPTE	NAB/IBC/Kemps , World Guide to Film & TV	BA/IBC/NAB/K emps etc.	NAB/IBC

D.I.S. Multi-Client Studies**Overall Design:**

The design of *Professional Camcorders World™ 2012* is modeled after the previous surveys of this kind, and the 40 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, as well as 29 years that D.I.S. Consulting Corporation has conducted custom, large multi-client and proprietary end-user and dealer market research surveys in the professional imaging and communications sectors in the U.S. and Europe since 1982. In all, Sheer and his firm have served more than 1,500 industry clients.

Experienced Staff:

D.I.S. Consulting Corporation maintains six regular staff and utilizes a project staff of five others on its syndicated projects. This core research group is augmented by use of other freelancers, as appropriate, for the individual projects undertaken. In all, D.I.S. currently publishes more than a dozen reports annually.

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.

D.I.S. Consulting Corporation's new software and structure permits nearly endless cross-tabulations or correlations of different aspects of the questionnaire (consult with us if you want a special cross-tabulation done). We invite end-user professionals to the website – enrolled them – and collected their individual product data using an on-line method. Up to date mailing lists were used including the freshest (international) the NAB Show attendee list, the similar IBC list (also international) as well as numerous other industry sourced mailing lists like Kemps International. All of them were also merged together to form an e-mail list for domestic and international calls.

INCENTIVES:

Survey respondents will receive a copy of the latest *DIS Camcorders End-User Report* for their help, estimated to be worth \$450.00 USD to them.

Clients Provide Inputs to Questionnaire and Report Format and Design:

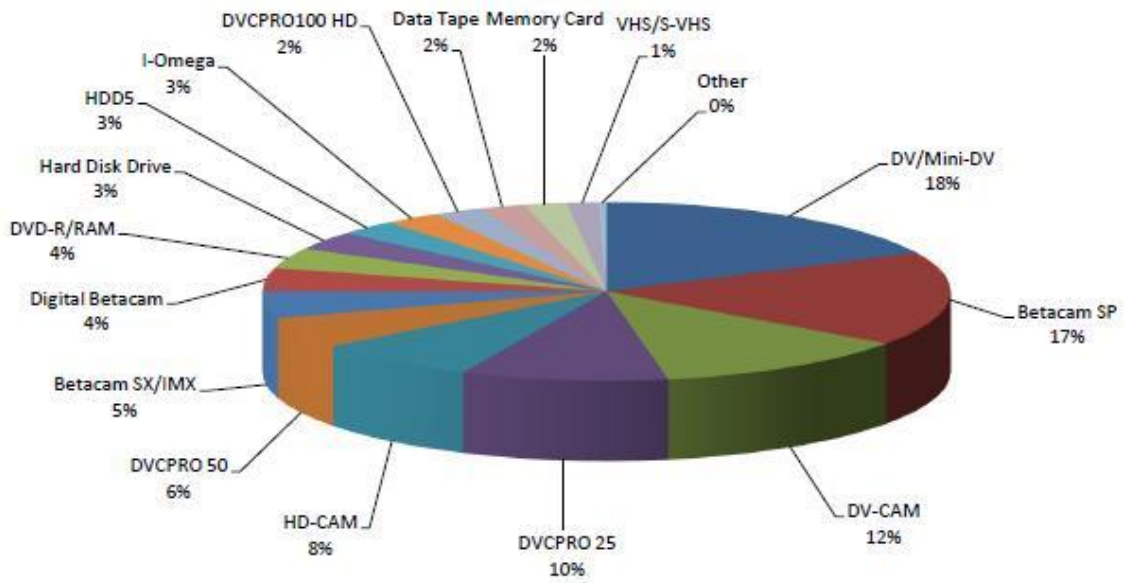
The questionnaire is designed to inventory installed brands and models, and stations, by product category. Data entry and computer tabulation is then done using a network of personal computers running the proprietary tabulation program. Microsoft Excel is used for the spreadsheets (tabs) and analysis 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.

SAMPLE TECHNOLOGY TRENDS – FROM PROFESSIONAL CAMCORDERS WORLD™2006

D.I.S. Consulting

C O R P O R A T I O N

Native Camcorder Recording Formats
What are your Native Camcorder Recording Formats ?



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Report Table of Contents

<p>FRONT MATTER Cover & Spines Introduction & Methodology Staff Roles & Biographies Executive Summary Industry Forecasts</p> <p>GENERAL REPORT Type and size of operation Leading applications as such: Sports, Events, News, TV Production, Training, Motion Pictures, etc. Size of budget Budget increasing, decreasing or remaining (2011/2012) Size of revenues Revenues increasing, decreasing, remaining (2011/2012) Number of employees Type of audio applications Number of staff having access to camcorder systems Extent of purchase authority Type of station or facility</p> <p>TECHNOLOGY TRENDS Type of programs created Recording formats for video Length of programs Departments responsible for camcorder equipment Native origination to edit transfers Workflow patterns Compression use Computer platforms used Disk versus tape 2D versus 3D Year of first purchase Year of latest purchase Use of Fiber Channel, Ethernet or SCSI Troublesome problems Summary of key features Other systems integrated with</p>	<p>MAGAZINES & TRADE SHOWS Trade magazines read, preferred, most valued Trade shows attended, planned, most valued</p> <p>BRAND IMAGE REPORT – BY GENRE General criteria for Brand Image Rankings Image rankings of major brands of camcorders including: For: a) Price, b) Quality, c) Reliability and d) After-sales-service</p> <p>PRODUCT REPORTS – BY SENSOR Organized by image sensor: By vertical market and region Number of the below systems owned (installed) Number of units by brand, model, type or series Value in \$ and number of units purchased in 2011 Value in \$ and number of units planned for 2012 Value in dollars and Breakdowns by major application groups Longer term prospects for sales – 5-year forecasts</p> <p>PRIMARY RECORDING FORMATS Mini-DV/HDV, DV-CAM, Betacam/SP, DVD, 3D, HD-CAM/HD-CAM/SR, Memory Card, XD-CAM, P2, Hard Drive, AVC-HD, DSLRs, etc</p> <p>With Brands to include: Canon, Grass Valley, Hitachi, Ikegami, JVC, Kodak, Leica, Nikon, Olympus, Panasonic, Pentax, Philips/BTS, Red, Sony, others</p>
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Format of Reporting Data

Summary tables, color Excel charts, graphs and a written summary sections show the quantitative results in each section or product category and are prepared using Microsoft Word™ 6.0, and Excel™ 7.0. The tables showing full corporate results and regional detail for all questions asked are also provided. The report is also available on computer disc. Below see report outline.

1. Product Report

- Brands and Formats arranged by Image Sensors
- Unit and market value data in each
- Brand and leading model market shares
- Installed base (owned)
- Purchases in the past 12months and value (2011)
- Plans to buy in the next 12 months and value (2012)
- Prospects for out years (5-year forecasts)
- Custom reports available (special cross-tabulations)

2. General Marketing & Media Report

- Trends relating to the overall state-of-the industry
- Equipment budgets and buying habits
- Demographics
- New Technologies, applications and trends, such as IP, TV, HD, 3D, MPEG, 4K, 8K, etc.
- Applications planned/used for, streaming, News, Sports, etc
- Trade magazine readership and trade show attendance and preference

3. Brand Image Report

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

Overall Design:

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