

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

Studio/Box/Field Camera World™ 2012

To be published: August 2012

General Overview:

Studio/Box/Field Camera World™ 2012 is the tracking GLOBAL survey of studio, field cameras and box/POV cameras and is seen as the most comprehensive, census-style syndicated market research survey ever conducted of these products globally. It is based off of three years of experience reporting from *Studio Camera World*, from which D.I.S. chose to integrate research on Box cameras to better serve our clients changing needs. Note: Studio Cameras were done by themselves in the past, but now are being covered under one umbrella project with Box Cameras and Field, but taken separately, reported and forecast separately as well. This study is a gain organized by Image Sensor.

Markets Surveyed:

Seven sub-markets of professional video end-users were surveyed, globally. They included the following groups:

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

World regions include:

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

The survey, in terms of product and market coverage, was far reaching and overall reporting detail focuses on those market segments of interest

to the client, including installed base (number and type of studio cameras/box/field cameras owned), actual 2011 and actual/anticipated 2012 purchases, 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 was 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.

Key Issues:

Among the most important issues this year are the following:

- Organized by Image Sensor
- Camcorders challenging studio cameras
- Rise of 4K and 8K
- Competing formats and the proliferation of HD
- Plummeting prices are eroding manufacturer's profits
- 3D is challenging the dominance of pure HD
- Strength of 2/3-inch and potential for 4/3-inc and 35mm
- Build up of consumer 1080p demands higher quality recording
- Maintaining rugged strength despite miniaturization
- Lowering power drain becoming important
- Increase in use of fixed-position broadcast quality gear
- We did not, however, seek to count CCTV cameras in this study
- Brand shares and forecasts for leading accessories including:
Lenses and Tripods

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.

Sample Frame and Lists Sourced:

The *Studio/Box/Field Camera 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 covered five regions:

1. USA 2. Europe 2. ME/A 3. Asia 4. The Americas

Market Segment & Regional Universe						<i>Responses Sought**</i>
Vertical Market	USA	Europe	ME/A	Asia	Americas	
<i>Broadcast/Cable</i>	80	70	60	45	30	285
<i>Production/Post-Production</i>	70	50	40	35	20	215
<i>Mobile/OB</i>	50	40	30	25	20	165
<i>Ind. Film and & Video</i>	50	40	30	25	20	165
<i>Event Videographers</i>	50	30	30	25	15	150
<i>Institutional Facilities</i>	30	30	30	25	15	130
<i>Equipment Rental</i>	20	20	20	20	10	90
Total User Markets	350	280	240	200	130	1,200

Design:

The study was modeled after the previous surveys of this kind, and the 40 years

Lists by Region and Marketplace					
Markets	USA	EUROPE	M-E/A	ASIA	AMERICAS
Broadcast/ Cable	NAB/SMPTE Broadcasting & Cable Ybk	NAB/IBC Sonovision	NAB/IBC/Kemps World Guide to Film & TV	BA/IBC/NAB ABU/SMPTE World Guide	NAB/IBC World Guide Film & TV
Production/ Post	Broadcasting & Cable Ybk, RTNDA, SMPTE	NAB/IBC Sonovision	NAB/IBC/KempsW orld Guide to Film & TV	BA/IBC/NAB Kemps BIRTV	NAB/IBC
Mobile/OB	NAB/SMPTE O'Dwyers	NAB/IBC Sonovision	IBC/Kemps Compass	BA/IBC/NAB Kemps, etc.	NAB/IBC Set/Caper
Ind. Film & Video	NAB/SMPTE Yellow Pages	NAB/IBC Sonovision	NAB/IBC/Kemps Sonovision,	BA/IBC/NAB Kemps/China & Japan guide	NAB/IBC guides SET/Caper
Event Videographers	NAB/SMPTE O'Dwyers	NAB/IBC, Sonovision	IBC/Kemps Compass	BA/IBC/NAB Kemps, BIRTV	NAB/IBC Set/Caper
Institutional	NAB/SMPTE Yellow Pages	NAB/IBC Sonovision	NAB/IBC/KempsSo novision etc.	BA/IBC/NAB/ Kemps/China Directory & Japan Guide	NAB/IBC SET/Caper
Equipment Rental	Broadcasting & Cable Ybk, RTNDA, SMPTE	NAB/IBC Sonovision	NAB/IBC/Kemps, World Guide to Film & TV	BA/IBC/NAB/ Kemps etc. BIRTV	NAB/IBC

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 publishes 28 reports annually.

Methodology:

As in previous years, D.I.S. had 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 invited 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 Studio Cameras End-User Report* for their help, estimated to be worth \$450.00 USD to them.

Clients Provided Inputs to Questionnaire and Report Format and Design:

The questionnaire was 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 STUDIO CAMERAS WORLD™2007



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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, Motion Pictures, Robotic Fixed, Live Events, Documentary, News, etc. Size of budget Budget increasing, decreasing or remaining (2011) Size of revenues Revenues increasing, decreasing, remaining (2011) Number of employees Number of staff having access to audio systems Extent of purchase authority Type of station or facility</p> <p>TECHNOLOGY TRENDS Recording formats-video Departments responsible for cameras Where equipment gets used Workflow patterns Compression use and Native Sensor types Computer platforms used SD versus HD versus 3D 4K and 8K developments Year of first camera purchase Year of latest camera purchase Use of Fiber Channel, Ethernet or SCSI Troublesome problems Summary of key features Other systems integrated with cameras And, more</p>	<p>MAGAZINES & TRADE SHOWS Trade magazines read, most valued Trade shows attended, valued</p> <p>BRAND IMAGE REPORT – BY SENSOR – General criteria for Brand Image Rankings Image rankings of major brands of servers including: For: Awareness and a) Price, b) Quality, c) Reliability and d) After-sales-service</p> <p>PRODUCT REPORTS – BY TYPE By vertical market and region – Organized by Image Sensor 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 Breakdowns by major application groups Longer term prospects for sales – 5-year forecasts Counts and shares of major accessories including: Lenses and Tripods</p> <p>With Brands that included: Grass Valley, Hitachi, Ikegami, JVC, NEC, Panasonic, Philips/BTS (among installed), Red, Sony, ARRI, Phantom, Panavision, Flo-vel, etc.</p> <p><i>See on-line questionnaire for full range of brands</i></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 were 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

- Sections of the product genre categories surveyed
- Unit and market value data in each
- Brand and leading model market shares
- Installed base (owned)
- Purchases in the past 12 months 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)
- Counts of and brand shares of lenses and tripods

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, 1080p, 35MM sensors, 4K and 8K
- Applications planned/used for, Streaming, MPEG, 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

Pricing and Terms:

Pricing is based on the number of regions and product categories desired. Each product category purchase includes the general reports. Brand image reports are included only with a purchase of three or more regions and/or product category reports. Pre-publication sponsor prices are lower than post prices.

Studio/Box Camera World™ 2012	* Pre-Publication Prices	Post-Publication
	(-20% Discounted)	Prices
		Orders After
		Publication

Report Type*

**Purchases which occur approximately three months before publication, Offers a 20% discount off of post-publication price*

Pre-Publication*	\$9,950 USD
Post-Publication	\$12,050 USD

Regional Reports			
<input type="checkbox"/>	1 region and sub-genre	\$5,950	\$7,140
<input type="checkbox"/>	2 regions and sub-genre	\$6,961	\$8,353
<input type="checkbox"/>	3 regions	\$8,144	\$9,772
<input type="checkbox"/>	ALL 5 regions	\$9,950	\$12,050
	(Global FULL Sponsorship)	<u>FULL GLOBAL</u>	<u>FULL GLOBAL</u>
The following sections are FREE with the above packages OR available a la carte at the rates illustrated below			
	Global Brand Image Report	\$3,495	\$4,194
	Single Region Brand Image Report	\$2,495	\$2,994
	Global Trade Media & Shows Sections	\$3,495	\$4,194
	Regional Trade Media & Shows Sections	\$2,495	\$2,994

- General Report is FREE with orders of one or more regions
- Brand Image report is FREE to sponsors of one or more regions/product genres

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