

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

Tripods & Supports World™ 2010

Publication date: July 2010

General Overview:

This is the first global survey of *Tripod & Supports World™ 2010* of professional-grade tripods and supports and focuses on the SD/HD transition in camcorders and related gear. It is the most comprehensive syndicated market research survey ever conducted regarding these products in the world. The global market of end-users will be surveyed, census style in the first-ever, and global 'bottoms-up' effort. This survey is expected to be the most comprehensive syndicated market research survey conducted regarding tripod & support systems.

Sectors covered include:

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

World regions include:

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

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 video displays owned), actual and anticipated purchases, and a 5-year forecast of all sales. In January, 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 traditional direct mail hard copy questionnaires and/or completed online. The data will be sorted and warehoused in an online database and analyzed. There is even a 'leaders' summary' with key findings and an easy-to-read 'bird-eye view' made especially for senior executives.

Key Issues:

- Weight classes – light duty, medium duty, heavy duty and pedestal
- Size and bulk of camcorders or cameras
- Materials and construction
- Transportability and compactness
- Durability and longevity
- Repetitive stress on moving parts

Sampling Plan

The Market, Universe Size and Response Levels That Are Sought is Based on 1,200 Completed Surveys.

Every effort is made to represent evenly the world regions surveyed:

- USA
- EMEA;
- Asia, *and*
- The Americas

Market Segment & Regional Universe	Responses Sought**				
	United States	EMEA	Asia	Americas	
Vertical Market					
<i>TV & Cable</i>	80	70	60	30	240
<i>Production & Post</i>	70	60	50	30	210
<i>Mobile/OB</i>	60	50	50	30	190
<i>Independent Film & Video</i>	50	50	30	30	160
<i>Event Videographers</i>	50	50	30	30	160
<i>Institutional Facilities</i>	40	30	25	30	125
<i>Equipment Rental Houses</i>	40	30	25	20	115
Total User Markets	390	340	270	200	1,200

Lists by Region and Marketplace				
Markets	USA	EMEA	ASIA	AMERICAS
TV & 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	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
Independent Film	NAB/SMPTE O'Dwyers	IBC/Kemps Compass	BA/IBC/NAB Kemps, BIRTV,	NAB/IBC Set/Caper
Event Videographers	NAB/SMPTE Yellow Pages	NAB/IBC Kemps, Sonovision, ETC	BA/IBC/NAB/ Kemps,China Broadcasting Directory	NAB/IBC Set/Caper
Institutional Facilities	NAB/SMPTE Yellow Pages	NAB/IBC Kemps, Sonovision, ETC	BA/IBC/NAB/ Kemps,China Broadcasting Directory	NAB/IBC Set/Caper
Equipment Rental Houses	NAB/SMPTE Yellow Pages	NAB/IBC Kemps, Sonovision, ETC	BA/IBC/NAB/ Kemps,China Broadcasting Directory	NAB/IBC Set/Caper

Deliverables: The sponsors receive a CD-ROM 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.

Highlights:

**Conjoint analysis: To help product planners, factory engineers as well as marketing managers to better plan next generation Tripod & Supports by detailing exactly what end-users really want. And, specifying the price they are seeking.

Sample Frame and Lists Sourced:

The Tripod & Supports World™ 2010 project uses a list of the following stations and facilities culled from IBC, NAB, 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.

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

The design of *Video Displays World™ 2010* is modeled after other benchmark surveys, and the 41 years of experience that Douglas I. Sheer, DIS Consulting Corporation's CEO, has had in a variety of marketing, publishing, advertising, consulting and research positions, as well as 28 years that DIS 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 1,400 industry clients.

Recent Studies:

Other multi-client studies include: *Broadcast Servers World™ 2010*, *Video Editing World™ 2010*, *Video Graphics World™ 2009* and *Video Switchers World™ 2010*. Another, *Professional Camcorders World™ 2009* was published in the winter of 2010. DIS Consulting Corporation also conducts numerous custom projects each year.

Experienced Staff:

DIS 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, DIS publishes 28 reports annually.

List Sources**Sample Frame and Lists Sourced:**

The *Tripods & Supports World™ 2010* project used a list of the television stations and production or post facilities from IBC, NAB, Broadcast Asia, *Broadcasting & Cable* both a magazine and a directory by Reed Elsevier Business Lists, a division of Cahner's Direct Marketing Services for cable. That culling targets chief engineers or the equivalent senior technology executives at each U. S. TV and Cable Station. Names of individuals from Production and Post-production facilities are also sourced from *The Yellow Pages* across the U. S.

In Europe, the Middle East and Africa, Asia and the Americas, Kemps International, The SMPTE Membership Guide, The World Guide to Film & TV, and specialized in-country directories, are used. Institutions are compiled via O'Dwyers Guide and other sources. The RTNDA list of news directors was also sourced to improve NEWS/ENG use coverage. Most audio listings are sourced from AES, Cedia, SPARS and APRS.

Top Ranked Firms Targeted:

Naturally, we seek to target each major network, large stations and facilities and MSOs, worldwide. So, we cull such names and addresses from all the lists we use. In general, the aim is to make sure that the top ranked sites get hit and not missed in our sampling. This is key as they often represent a disproportionate share of where gear can be found.

Report Table of Contents

<p>FRONT MATTER Introduction & Methodology Preface & Purpose Project Staff Executive Summary Industry Forecasts with 5 year span</p> <p>GENERAL REPORT Type of business Size of operation & number of employees Leading applications as such: News, Streaming, Sports, Documentary, Programs, etc. Size of budget Budget increasing, decreasing or stay the same Size of revenues Revenues increasing, decreasing, or stay the same Type of camcorder needing support, weight classes, Price range - different price levels Number of employees Number of staff having access to tripods Extent of purchase authority Month most often purchasing Type of station or facility</p> <p>TECHNOLOGY TRENDS Size and types used Type of recording media utilized (formats) Maximum weights Other mounted accessories that must be supported Departments responsible for Tripods Workflow patterns – shifting trends in capture HD/HDV and 3D orientation and transition Weights of tripods Mounts used Types of heads Year of first system purchase Year of latest purchase Troublesome problems, such as fractures, repetitive stress failures Summary of key features of tripods – conjoint Number of tripods now used Number of tripods planned Leading accessories in lenses, lighting, batteries, heads, dollies, trucks, tripod cases, etc.</p> <p>MAGAZINES AND TRADE SHOWS Trade magazines read, preferred, Single most valued Trade shows attended, planned Single most valued Websites visited Trade association memberships</p>	<p>BRAND IMAGE REPORT – BY GENRE General criteria for Brand Image Rankings Image rankings of major brands of tripods and supports including: For: a) Price, b) Quality, c) Reliability and d) After-sales-service</p> <p>PRODUCT REPORTS – BY GENRE By vertical market/region Number of units owned (installed) Number of units by brand, model, type or series Value in dollars Number of units purchased Value in dollars Number of units planned Value in dollars and/or euro Longer term prospects for sales – 5-year forecasts</p> <p>With Brands to include (but not be limited to): Anvall, Bogen, Canon, Cartoni, Cullman, Davis & Sandford, ITE, Fly's, Gefen, Gitzo, Hoodman, Kalimar, Libec, Manfrotto, Miller, O'Conner, Opteka, Pearstone, Promaster, Ravelli, RTS, Sachtler, Savage, Shotoku, Silk, Steadicam, Sunpak, Tocad, Vanguard, Varizoom, Velbon, Vinten, Zhongshan, plus others</p> <p>(See Brand Image and in Product Sections to locate name brand in the questionnaire)</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 REPORTS

- Tripod & Supports Product category and related aspects will be surveyed
- Unit and market value data in each – divided by weight class (light, medium, heavy and pedestal)
- Brand and leading model market shares
- Installed base (owned)
- Purchases in the past 12 months and value (2009)
- Plans to buy in the next 12 months and value (2010)
- Prospects for out years (5-year forecasts)
- Custom reports available (special cross-tabulations)

2. GENERAL MARKETING & MEDIA

- Trends relating to the overall state-of-the industry
- Equipment budgets and buying habits
- Demographics
- New Technologies, applications and trends
- Applications planned/used
- Trade magazine readership and trade show attendance and preference

3. BRAND IMAGE

- 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

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 ~ on-line ~ using a method where the responses are entered as they are 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 Made Inputs to Questionnaire and Report Formats:

The questionnaire is designed to inventory installed brands and model 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 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.

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.

Tripods and Supports World™ 2010	Pre-Publication Prices	Post-Publication Prices
Report Type*	Orders <u>By</u> closing	Orders <u>After</u> Publication
Regional Reports		
• 1 region	\$5,950	\$7,140
• 2 regions	\$6,961	\$8,353
• 3 regions	\$8,144	\$9,772
• ALL 4 regions -- (Global FULL Sponsorship)	\$9,950 <u>Full GLOBAL</u>	\$12,050 <u>Full GLOBAL</u>
<i>The following sections are FREE with the above packages OR available a la carte at the rates illustrated below</i>		
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

*** Fifty-percent (50%) of the fee is due on subscription (sponsorship) with our invoice and the remaining fifty-percent (50%) of the payment is due on delivery of the report(s). All payments must be made in USD and when made from foreign countries are to be made by bank wire transfer. In the U. S. a USD funds check is acceptable.

Overall Design:

The design of *Tripods & Supports 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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