

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 on 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 researched 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 results by type, sub-market and world regions surveyed. End-user data was collected by phone, and augmented by questionnaires completed online. The data will be sorted and warehoused in an online database and analyzed with 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
2.

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

Lists by Region and Marketplace

Markets	USA	Europe	MEA	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/Kemps World 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	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 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 O'Dwyers	NAB/IBC Sonovision	NAB/IBC/Kemps Sonovision	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, BIRTV	NAB/IBC

Design:

The study was 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. Over the past 30 years his firm, 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 more than a dozen 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 most recent (international) NAB Show attendee list, the similar IBC list (also international) as well as numerous other industry sourced mailing lists such as Kemps International. All were merged 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, a value of \$450.00 USD.

Clients Provided Input to Questionnaire, Report Format and Design:

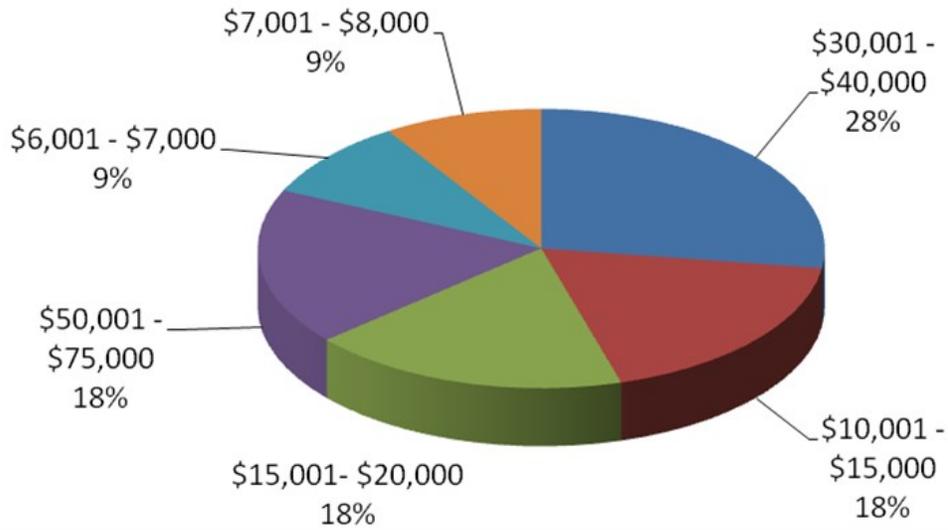
The questionnaire was designed to inventory installed brands, models, and stations - by product category. Data entry and computer tabulation is then done using a network of personal computers running the proprietary tabulation program. Microsoft Excel™ is used for the spreadsheets (tabs) and analysis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

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C O R P O R A T I O N

What would you expect to pay in dollars (USD) for the studio camera that contains the features and specifications you have indicated as most important to you?

AMERICAS



Report Table of Contents

<p>FRONT MATTER</p> <ul style="list-style-type: none">⤴ Cover & Spines⤴ Introduction & Methodology⤴ Staff Roles & Biographies⤴ Executive Summary⤴ Industry Forecasts <p>GENERAL REPORT</p> <ul style="list-style-type: none">⤴ 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>TECHNOLOGY TRENDS</p> <ul style="list-style-type: none">⤴ 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>MAGAZINES & TRADE SHOWS</p> <ul style="list-style-type: none">⤴ Trade magazines read, most valued⤴ Trade shows attended, valued <p>BRAND IMAGE REPORT – BY SENSOR</p> <ul style="list-style-type: none">⤴ 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>PRODUCT REPORTS – BY TYPE</p> <ul style="list-style-type: none">⤴ 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>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. See report outline below .

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/Field Camera World™ 2012	* Pre-Publication Prices (-20% Discounted)	Post-Publication Prices Orders After Publication
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Report Type*

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

Regional Reports		
1 region or sensor	\$5,950	\$7,140
2 regions or sensors	\$6,961	\$8,353
3 regions or sensors	\$8,144	\$9,772
ALL 5 regions (Global FULL Sponsorship)	\$9,950 FULL GLOBAL	\$12,050 FULL GLOBAL
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

All prices are shown in USD

* 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.

CONTACT INFORMATION:

Douglas I. Sheer
 CEO & Chief Analyst
 DIS Consulting Corporation
 Box 22
 Livingston Manor, NY 12758, USA
dougsheer@gmail.com
 Telephone: 917-692-0975
 URL: www.disresearch.com

General Information:
Info@disresearch.com