

DIS Consulting Corporation

Publishing syndicated market research surveys in media technology markets since 1982

Professional Photographic World™ 2007

PPW 2007 Will Be Published in February 2008
-20% Front-End Discounted Prices Available November, 2007

Survey Description

General Overview:

Professional Photographic World™ 2007 is the first global survey of professional photographic equipment genres in use among worldwide professionals, and intended to become the most comprehensive syndicated market research survey ever conducted regarding these products.

In all, five (5) separate sub-markets of professional end-users will be surveyed, census style in this first-ever, and global “bottoms-up” effort. The product focus is largely digital, the current state of the professional market, and will mainly on the increasing role of digital apparatuses and materials.

The Survey Covers Ten Genre of Professional Photographic Products, including:

- 1) Digital Pocket-sized Cameras
- 2) Digital SLR Cameras
- 3) Digital Backs for Medium and Large Format Cameras
- 4) Digital Photographic Recording Media
- 5) Photo Capable Scanners (Flatbed, Film and Slide)
- 6) Digital Photographic Printers
- 7) Printing Papers for Digital Photographic Printers
- 8) Printing Inks for Digital Photographic Printers
- 9) Lighting Systems
- 10) Photographic Related Softwareⁱ

End-User Markets Include:

Five sub-markets of professional audio end-users will be surveyed, globally, including:

- 1) Photo Journalism
- 2) Portrait & Wedding Studios
- 3) Labs and Graphic Service Bureaus
- 4) Commercial Studios
- 5) Institutional (Corporate In-House, Governmental, Medical, Educational & Fine Art)

In terms of product and market coverage, the survey focuses on those market segments regarding their installed base, purchases in 2006 and plans to purchase in 2007 as well creating a 5-year forecast of all sales. In November 2007, we will publish a comprehensive report, showing all results in Total (all sub-markets) and one report each for the four major geographic regions. The data collection method, via a website, and a C. A. T. I. Telephone interviewing technique, augments the traditional direct mail hard copy questionnaire distribution. The combination of collection methods are blended seamlessly.

ⁱ Additional product genres may be added by launch time at the Clients' request.

Deliverables:

The sponsors receive a CD-ROM copy of the survey results (containing PDF sections) for those regions they have sponsored and/or for the global totals if they have sponsored the survey on a global level. Sponsors also receive a hard copy set of the data. 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.

The Market, Universe Size and Response Level Sought (600 responses sought):

This tracking survey covered four regions: USA, EMEA (Europe, Middle East, and Africa), Asia and the Americas—these regions closely follow manufacturer’s sales territories—for activity among broadcast TV and cable TV stations, production and post-production facilities markets, shown with an estimated total universe size in terms of number of sites and responses to the trends and products questions of the study from which projections will be made.

SAMPLING PLAN

Vertical Markets	United States	Europe ME/Africa	Americas	Asia-Pacific	total global PPW 2006 Survey Response Anticipated*
Photo Journalism	40	40	15	25	120
Portrait & Wedding Studios,	40	40	15	25	120
Graphic Service Bureaus & Labs	40	40	15	25	120
Institutional Facilities, Educational & Fine Art	40	40	15	25	120
Commercial Photo Studios	40	40	15	25	120
Total User Markets	200	200	75	125	600

(# s = the number of anticipated responses sought) * estimated

DIS Multi-client Studies

Overall Design:

The design of *Professional Photographic World™ 2007* is based on other benchmark surveys, and 37 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 and, on the 25-year record his firm DIS 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 1,100 industry clients.

Other recent multi-client studies include: *Video Editing World™ 2007*, *Video Graphics World™ 2007*, and *Video Switchers World™ 2007*. Another study, *Professional Camcorders World™ 2006* was published earlier this year. DIS Consulting Corporation also conducts numerous custom projects each year and publishes 18 global reports annually.

Staff Experience:

DIS Consulting Corporation maintains five 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.

The Methods Used

The Use of Syndicated Direct Mail:

The syndicated multi-client research methodology used by DIS Consulting Corporation features a combination of a classical direct mail self-completion interviewing technique, where respondents fill out a pre-coded booklet-questionnaire, with a C. A. T. I. Telephone interviewing technique, as well as data collection via an on-line website.

Installed equipment is taken, census style, and 12 months past purchases and plans to purchase over the next 12 months are also gathered. Other sections have questions on media and shows, equipment budgets, purchase authority, brand image, staffing and technological trends.

Respondent Incentives:

Survey respondents receive a summary *Professional Photographic World™ 2007* for their help, which we estimate to be worth at least \$650 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.

List Sources:

Sample Frame and Lists Sourced:

The *Professional Photographic World™ 2007* project will use an assortment of lists of the photo professionals and derived from leading trade show and professional associations. That culling targets ACMP, AICP, PMA and names 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 and specialized in-country directories were also utilized. Institutional will access via O'Dwyer's Guide and other sources. The list of journalists will also be sourced.

Avoiding Duplication:

Every effort has been made to avoid overlap and duplication in the lists utilized. A merge/purge program gets run to sort and be sure that only one questionnaire per targeted name is mailed. Top ranked firms are targeted.

Lists by Region and Marketplace

<u>Markets</u>	<u>USA</u>	<u>Europe/ME/Africa</u>	<u>Asia</u>	<u>Americas</u>
Journalism	NAB/SMPTE Broadcasting & Cable Ybk NPPA	NAB/IBC/Kemps World Guide to Film & TV	BA/IBC/NAB ABU/SMPTE World Guide To Film & TV	NAB/IBC World Guide To Film & TV SET/Caper
Institutional (Gov't, Medical, Educational, Corporate and Fine Art)	NAB/SMPTE O'Dwyers SPE	IBC/Kemps Kompass	BA/IBC/NAB Kemps, etc.	NAB/IBC Set/Caper
Portrait & Wedding	Yellow Pages	Photokina	Photokina	Photokina
Studios	PMA			
Labs & Graphic Service Bureaus	SIGGRAPH PMA	SIGGRAPH Photokina	SIGGRAPH Photokina	SIGGRAPH Photokina
Commercial Studios	PMA	Photokina	Photokina	Photokina

Note: As of this printing, no decision has been reached by Photokina on use of their list of professional attendees. In the event that it is not forthcoming other sources will be utilized for global Labs/Service Bureaus and Commercial Studios.

Report Table of Contents

<p>FRONT MATTER Cover & Spines Introduction & Methodology Staff Roles & Biographies Executive Summary Industry Forecasts Global Market Sizing and Value Leaders Summary</p> <p>GENERAL REPORT Type and size of operation Leading applications as such: journalism, portrait & wedding studios, institutional, fine art, labs and graphics service bureaus, etc. Size of budget Budget increasing, decreasing or remaining (2005/2006) Size of revenues Revenues increasing, decreasing, remaining (2005/2006) Number of employees Type of photographic applications Number of staff having access to photo/graphics systems Extent of purchase authority Type of operation or facility Technology Trends Features most desired in new products Film versus digital percent Type of recording and storage utilized Maximum imaging, recording and storage capacity Departments responsible for photographic equipment Workflow patterns Compression use Computer platforms used disk versus film Year of first pro photo system purchase Year of latest pro photo system purchase Use of Fiber Channel, Ethernet or SCSI Troublesome problems such as crashes and firewalls Summary of key features of photo gear genres Automation software used Other systems that photo systems integrate with (such as graphics) Magazine, Web Sites and Trade Shows Trade magazines read and preferred Single most valued Trade shows attended and planned Single most valued Web Sites visited most and</p>	<p>PRODUCT REPORT(s) – 10 Photographic Genres</p> <ul style="list-style-type: none">• Digital Pocket-sized Cameras• Digital SLR Cameras• Digital Backs for Medium and Large Format Cameras,• Digital Photographic Printers,• Photo Capable Scanners (Flatbed, Film and Slide)• Displays,• Printing Papers,• Digital Photographic Recording Media,• Lighting Systems,• Photographic Related Software <p><i>some additional product genre may be added by launch time</i></p> <p>By vertical market and region Number of photographic genre owned (installed) Number of photographic genre units by brand Number of units by brand, model, type or series Installed Value in dollars Number of units purchased in 2005 Value in dollars Number of units planned for 2006 Value in dollars Longer term prospects for sales – 5-year forecasts</p> <p>BRAND IMAGE REPORT – By Genres General criteria for Brand Image Rankings Image rankings of major brands of servers including: For: a) Price, b) Quality, c) Reliability and d) After-sales-service</p> <p>Brands to be included (but not be limited to): Adobe, Apple, Alps, Agfa, Arches, Arca-Swiss, ARRI, Balcar, Bell & Howell, Bogen, Brother, Bronica, Bushnell, Canon, Calumet, Casio, Chimera, Contax, Crucial, Corsair, Dell, Dyna-lite, Epson, EP Memory, Elinchrom, Fargo, Fuji, Gretag-McBeth, Hahnemuhle, Hassleblad, H-P, HiTi, HT, Ilford, Imation, Imacon, Kodak, Konica, Kyocera, Leica, Leaf, Legion, Lexmark, Lowel, Lowepro, Lumadyne, Mamiya, Minolta, Microtek, Mitsubishi, M-photo, Nikon, Norman, Noritsu, Oriental-Graphico, Omega, Olympus, OKI, Panasonic, Pentax, ProFoto, Phase One, Polaroid, PQI, Pictorico, Photogenic, Photosmart, Promedia, Quantum, Rollei, Roland, Samsung, Seconic, SanDisk, Scitex, Stylus, Speedotron, Sony, Sinar, TDK, Tamrac, Tamron, Tektronix, Tokina, Toshiba, View Camera, Wacom, Wasp, Xerox, X-rite, etc.</p> <p>(See the questionnaire in Brand Image and in product genre sections to locate brands by name)</p>
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Single most valued web sites

Format of Reporting Data

Summary tables, color Excel charts, graphs and a written summary sections show both quantitative and qualitative results in each section or product category and are prepared using Microsoft Word TM 6.0, and Excel TM 7.0. The tables showing full corporate results and regional information for all questions asked are also provided. The report is also on a computer disc. There are three types of reports available:

1. Product Report

- **10 photographic product genre categories surveyed (see other sections)**
- **Unit and market value data in each**
- **Brand and leading model market shares**
- **Installed base (owned)**
- **Purchases in the past 12 months and value (2007)**
- **Plans to buy in the next 12 months and value (2008)**
- **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, digital archival keeping**
- **Applications planned/used for, archiving, MPEG, 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 & Terms

Pricing is based on the number of regions required. Each regional purchase includes the General Report sections. The Brand Image Reports are also included with a purchase of one or more regional reports. Pre-Publication Sponsor prices (pre-publication by June 15th 2007) are lower than post publication (October, 2006 and beyond) prices. Consult us for Package and Custom Cross Tabulation Pricing.

Professional Photographic World™ 2007 The first Global survey	Pre- Publication Prices	Post- Publication Prices
Report Type*	Orders <u>By</u> November 2007 (-20% Discounted)	Orders <u>After</u> Publication by February 2008
Regional Reports		
• 1 region or global product genre	\$5,950	\$7,140
• 2 regions or global product genres	\$6,961	\$8,353
• 3 regions or global product genres	\$8,144	\$9,772
• ALL 4 regions – all product genres (Global FULL Sponsorship)	\$9,950 <u>FULL</u> <u>GLOBAL</u>	\$12,050 <u>FULL</u> <u>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

Terms are that the down payment of fifty-percent (50%) of the fee is due on subscription (sponsorship) with our invoice and the remaining fifty-percent (50%) payment on our delivery of the report(s) to you. 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.

DIS Consulting Corporation **FAXFORM**
Professional Photographic World TM 2007

TO: Douglas I. Sheer	DIS Consulting Corporation	FAX: 212-213-6876
FROM: _____	COMPANY: _____	TITLE: _____
TEL: _____	FAX: _____	EMAIL: _____

I want to order <i>Professional Photographic World TM 2007</i> -- with the following Regions, Product Genre or Sections:		
USA Report	[]	
Europe/ME/A Report	[]	
Americas Report	[]	
Asia Report	[]	
Full GLOBAL Report	[]	
<i>Product Genre & Special Sections</i>		
• Digital Pocket-sized Cameras	[]	
• Digital SLR Cameras	[]	
• Digital Backs for Medium and Large Format Cameras,	[]	
• Digital Photographic Recording Media,	[]	
• Photo Capable Scanners (Flatbed, Film and Slide)	[]	
• Digital Photographic Printers,	[]	
• Printing Papers for Digital Photographic Printers,	[]	
• Printing Inks for Digital Photographic Printers	[]	
• Lighting Systems,	[]	
• Photographic Related Software	[]	
• Full Global Brand Image Section	[]	
• Full Global Trade Magazines, Shows & Sites	[]	

⇒ Invoice me and ship the above [] Signature: _____

⇒ Contact me [] Date: _____

⇒ Send me more information [] Specify: _____

Fax this completed form to (212) 213-6876
Thank you!