

# WHAT'S WHAT IN REMOTE PRODUCTION

## RESULTS OF THE NINTH ANNUAL SVG REMOTE PRODUCTION GEAR STUDY



Just as the sun officially sets on standard-definition mobile units and the HD transition is nearly complete, a new player has arrived on the remote-production scene ready to shake things up: 4K/Ultra HD. In December, Mobile TV Group turned heads across the industry when it announced plans to launch a 4K/UHD truck this year, and NEP says it now has 10 4K-capable mobile units. Several other truck providers look to be following suit soon. It marks a cycle the industry has seen several times over in the past: just as technology seems ready to settle down, a wave of innovation turns the business on its head once again.

The ninth annual edition of SVG's Remote Production Gearbase, which was released in December and is broken down further here, serves as a portrait for a thriving industry that is, nonetheless, in transition. With SD all but gone, HD flourishing, 4K on the way, and a continued push toward IP-based workflows, truck vendors find themselves at interesting crossroads.

Perhaps the most notable industry trend in recent years has been rapid consolidation, driven largely by NEP Broadcasting's acquisition spree. With the purchase of MIRA Mobile and Turner Studios trucks last year, NEP's fleet grew from 47 in 2013 to a whopping 60 units by the end of 2014 — more than twice as many as its nearest competitor (Mobile TV Group with 25).

Standard definition looks to have finally gone the way of the dodo, with smaller regional, streaming, and college productions transitioning to HD trucks or alternative production models. Having held 20% of the market as recently as 2011, SD trucks represented less than 5% of the trucks on the road last year, with even those units expected to be retired by 2016.

One thing is for sure: the industry remains in building mode. More than 20 HD mobile units were launched or entirely refurbished between fall 2013 and the end of 2014. Among the new mobile units to hit the road: CSP Mobile Productions' HD-B1; D2 Productions' Zeppelin; Dome Productions' HD; F&F Productions' GTX-17; Game Creek Video's FX quartet, Spirit (A and B), and Riverhawk; IMS Productions' HD5; Lyon Video's Lyon 14; MIRA Mobile's M14HD (now owned by NEP); Mobile TV Group's 35HDX, 36HDX, and 37HDX (all with VMU visitor-feed trucks); and NEP's ND1 and EN1 (four trucks apiece).

The annual SVG Gearbase Survey provides an ongoing database of production-truck technology for the North American fleet of more than 200 broadcast vehicles. The 2014 Gearbase comprised 207 total trucks, only nine of them SD. A brief summary of other key findings (data as of December 2014) appears on the next page.

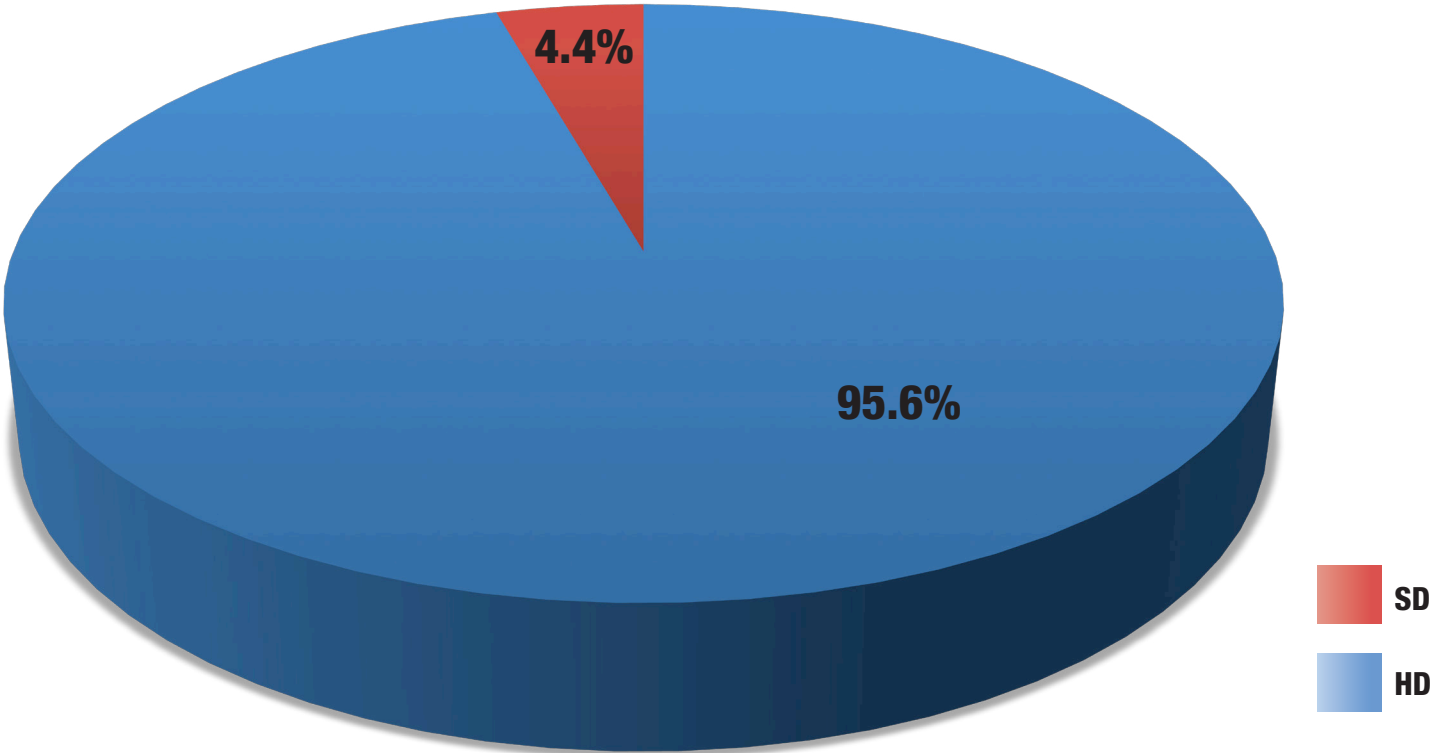
# SUMMARY OF FINDINGS

- 113 trucks make use of Sony cameras — tops in the industry followed by Grass Valley with 63 trucks and Ikegami with 21 trucks.
- The battle for the lens market share continues a two-horse race: just under 60% of HD trucks (121) carried Canon lenses in 2014, and Fujinon represented just over 40% of the market (82 trucks).
- Among HD production switchers, Grass Valley continued to dominate, with its units found at the center of 170 HD trucks. Sony's MVS switchers were in 21.
- The router sector continues to be diverse, led by Grass Valley in 60 trucks (boosted by its merger with Miranda under the Belden brand last year) followed by Evertz in 49 and Pesa in 44. Utah Scientific and Nvision are found in 12 and nine trucks, respectively.
- ChyronHego remains the market leader in HD graphics, with its systems in nearly every truck on the road (178 of the 182 trucks that named a specific graphics system).
- In HD replay devices, EVS was once again the undisputed industry standard, with 184 HD trucks reporting some form of EVS system as its primary replay device.
- Calrec Audio remains the number-one audio console in HD trucks, with 136 consoles in 66.6% of the HD trucks; Yamaha is second with consoles in 21 mobile units.
- Although most trucks carried a mix of several vendors' microphones, Sennheiser was the top brand with 179 HD mobile units carrying its mics. Sony was not far behind with 144, and EV mics were in 123.

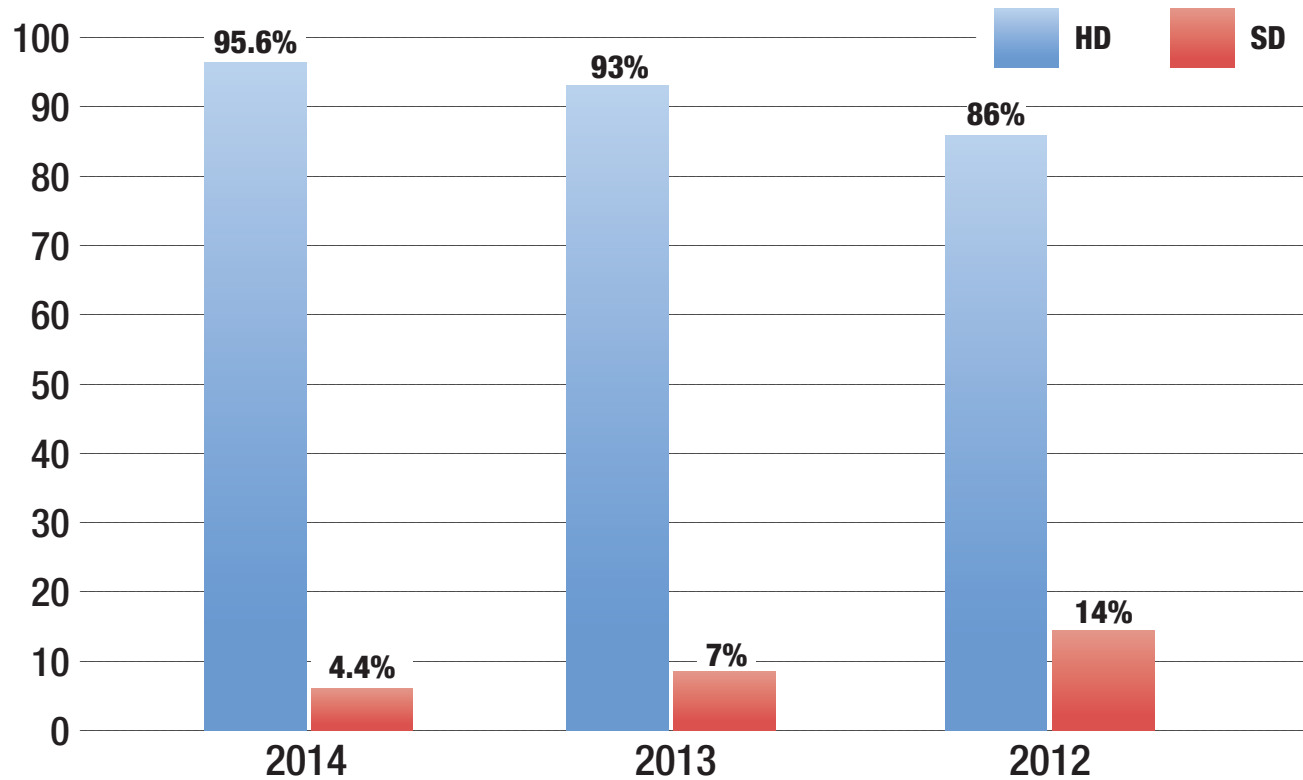
NOTE: Data does not reflect equipment provided by truck vendors on an "as requested" basis (cameras, lenses, microphones, tapeless graphics).



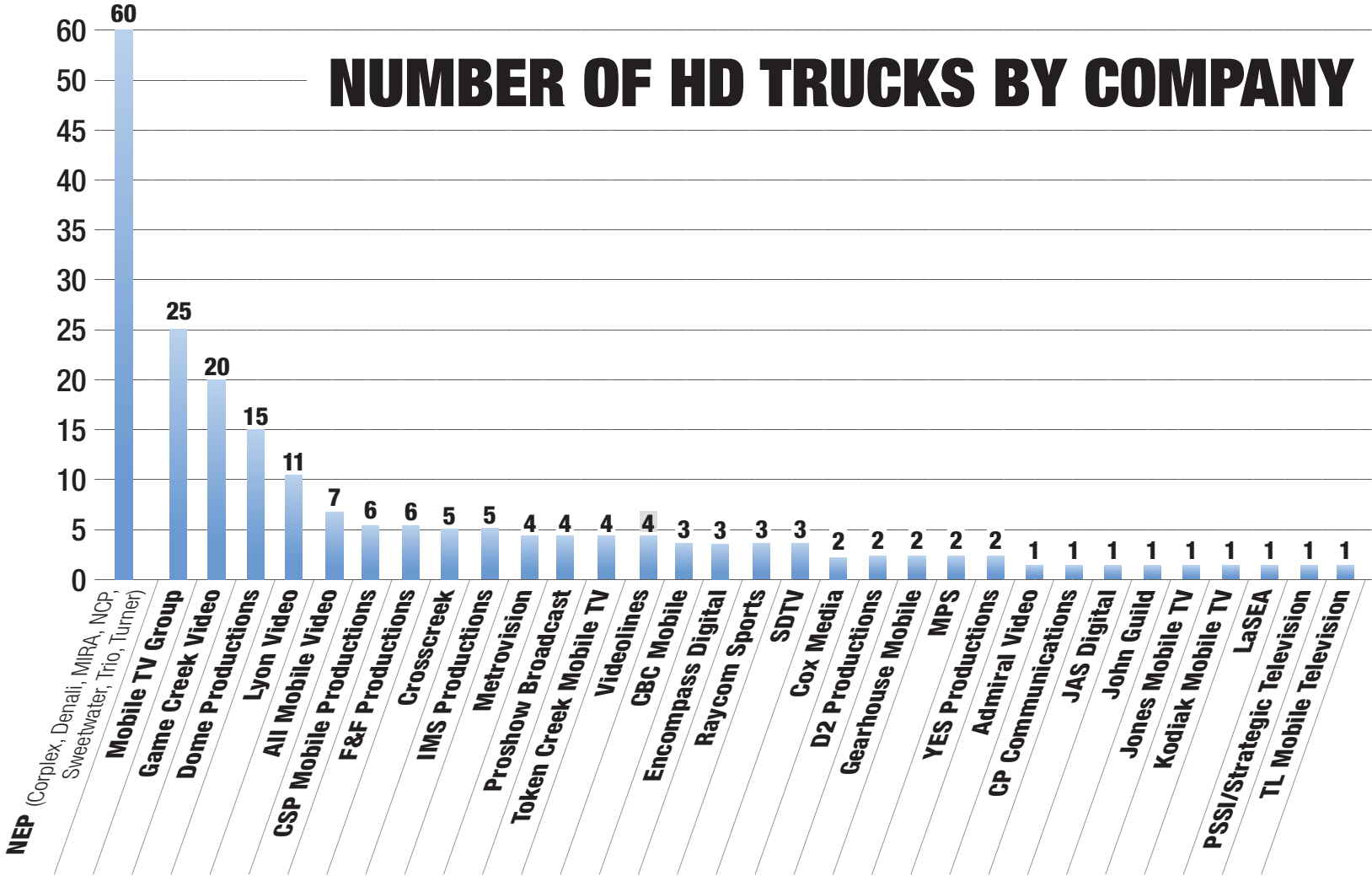
# PERCENT OF TRUCK MARKET — HD/SD



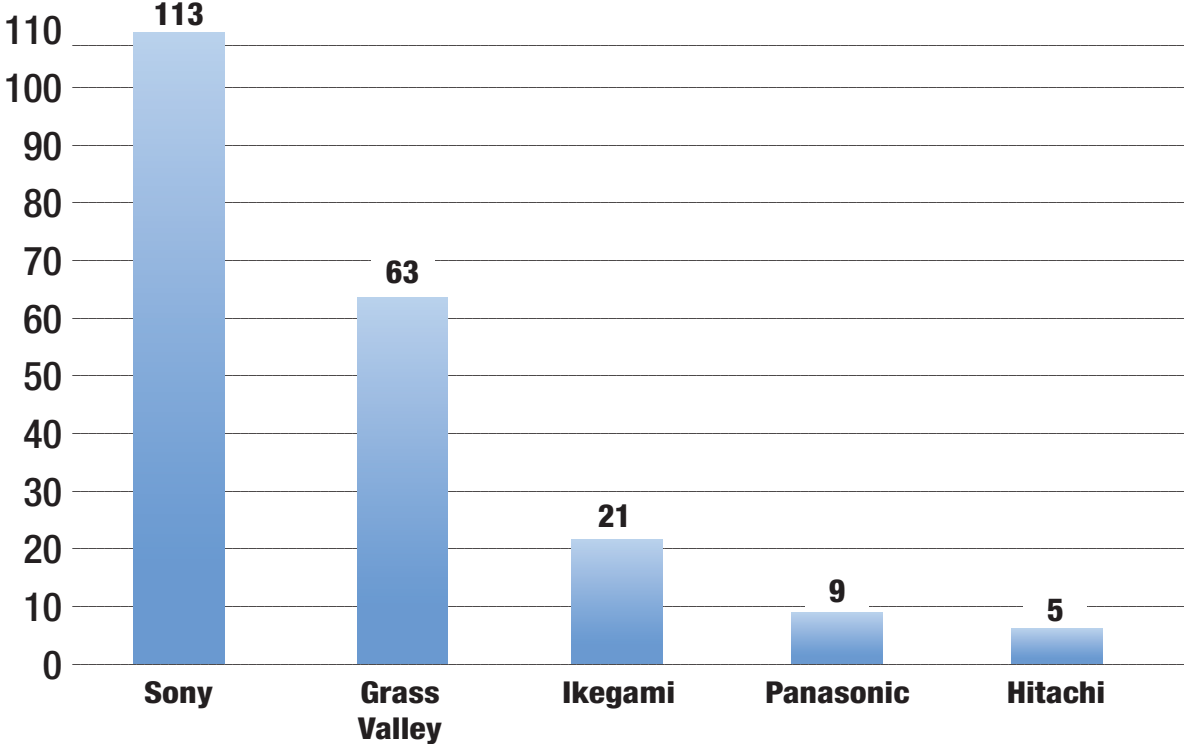
# 2014 vs. 2013 vs. 2012: PERCENT OF HD vs. SD TRUCKS



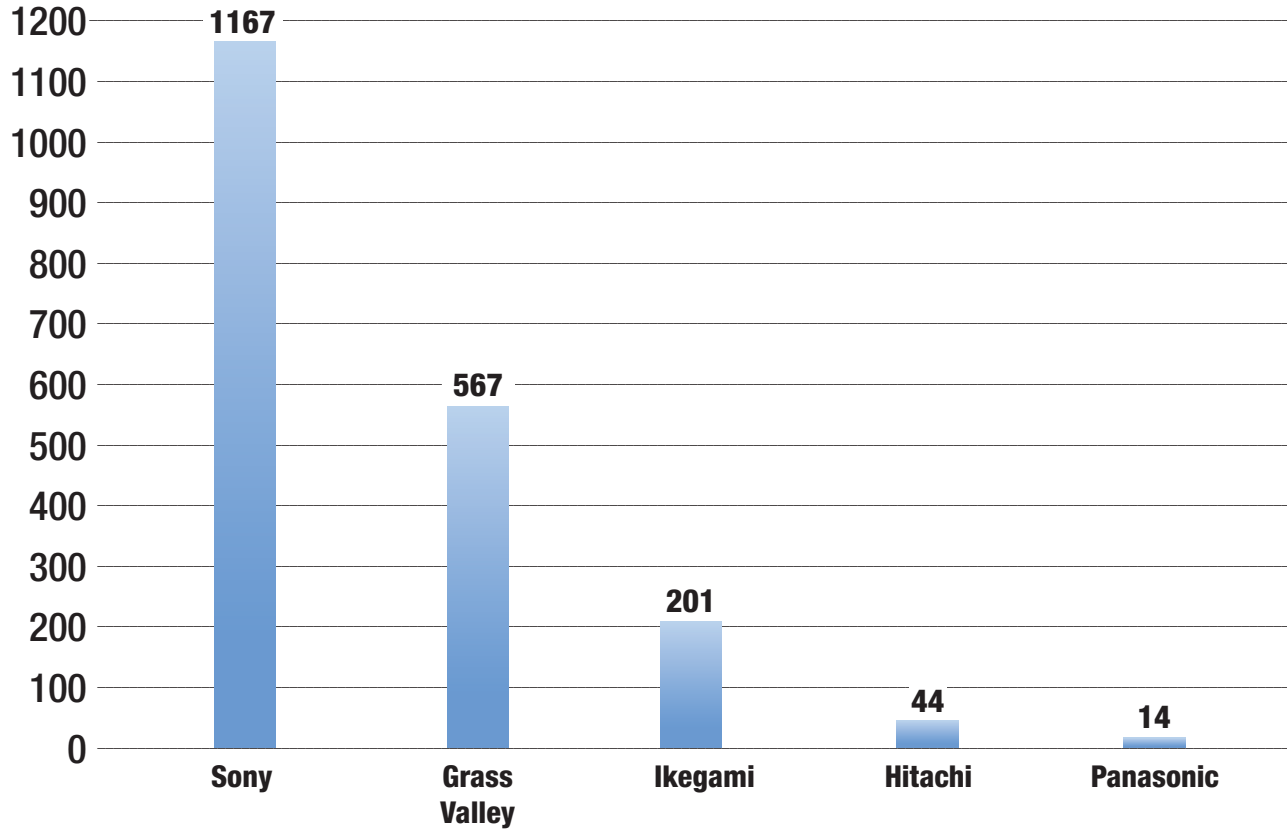
# NUMBER OF HD TRUCKS BY COMPANY



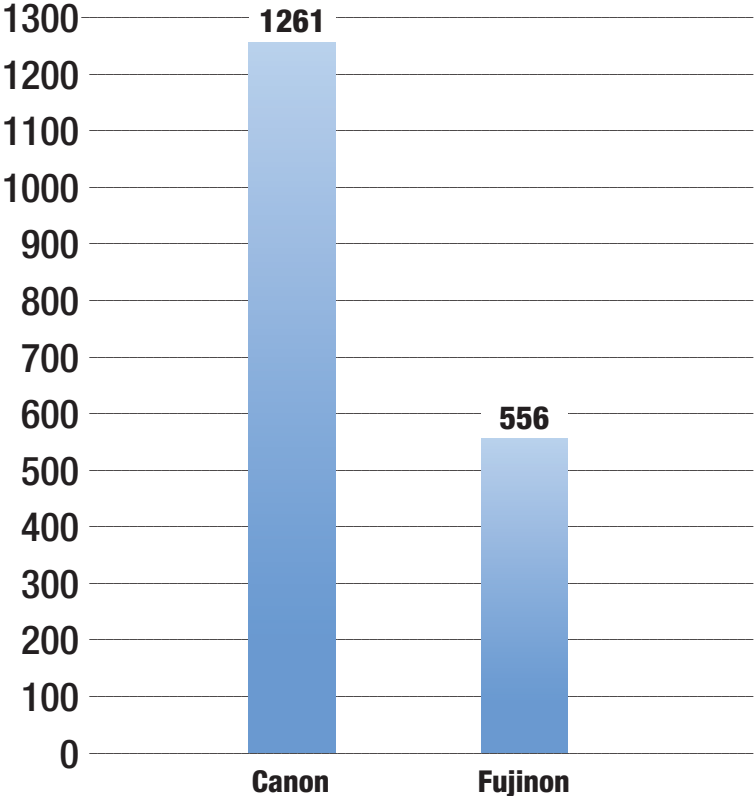
# NUMBER OF HD TRUCKS BY CAMERA BRAND



# NUMBER OF HD CAMERAS BY BRAND

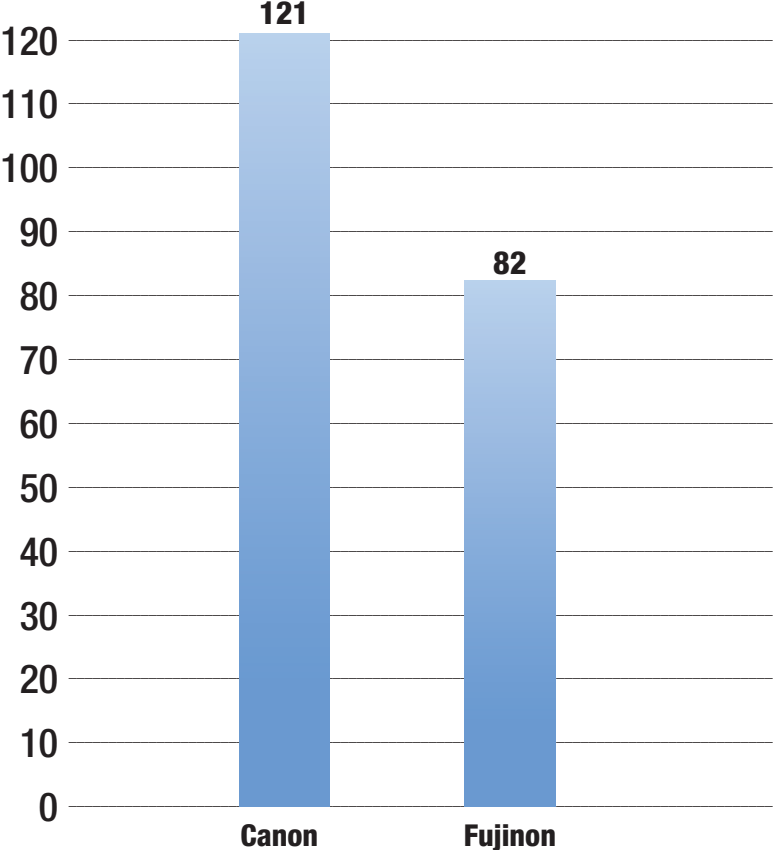


# NUMBER OF HD LENSES ON TRUCKS BY BRAND

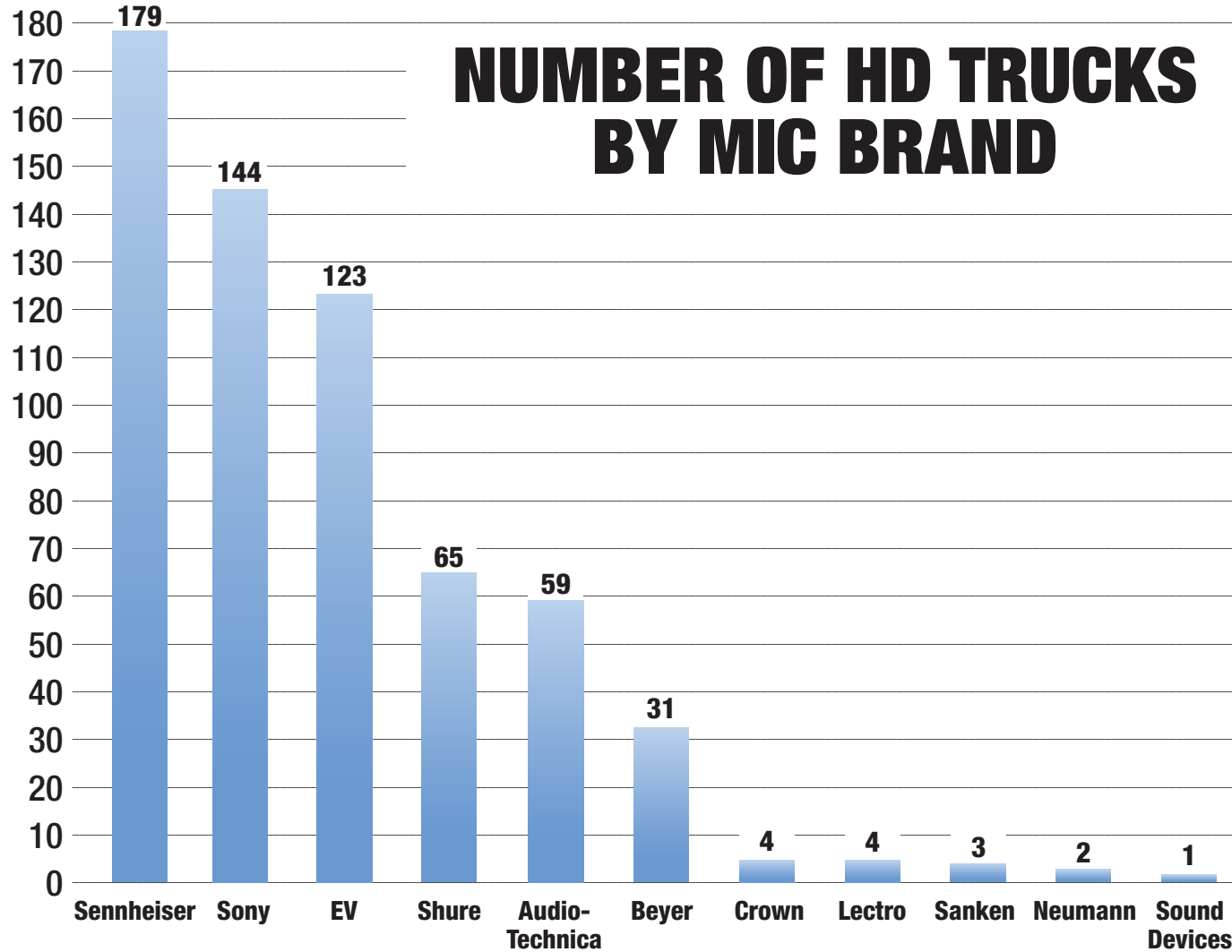




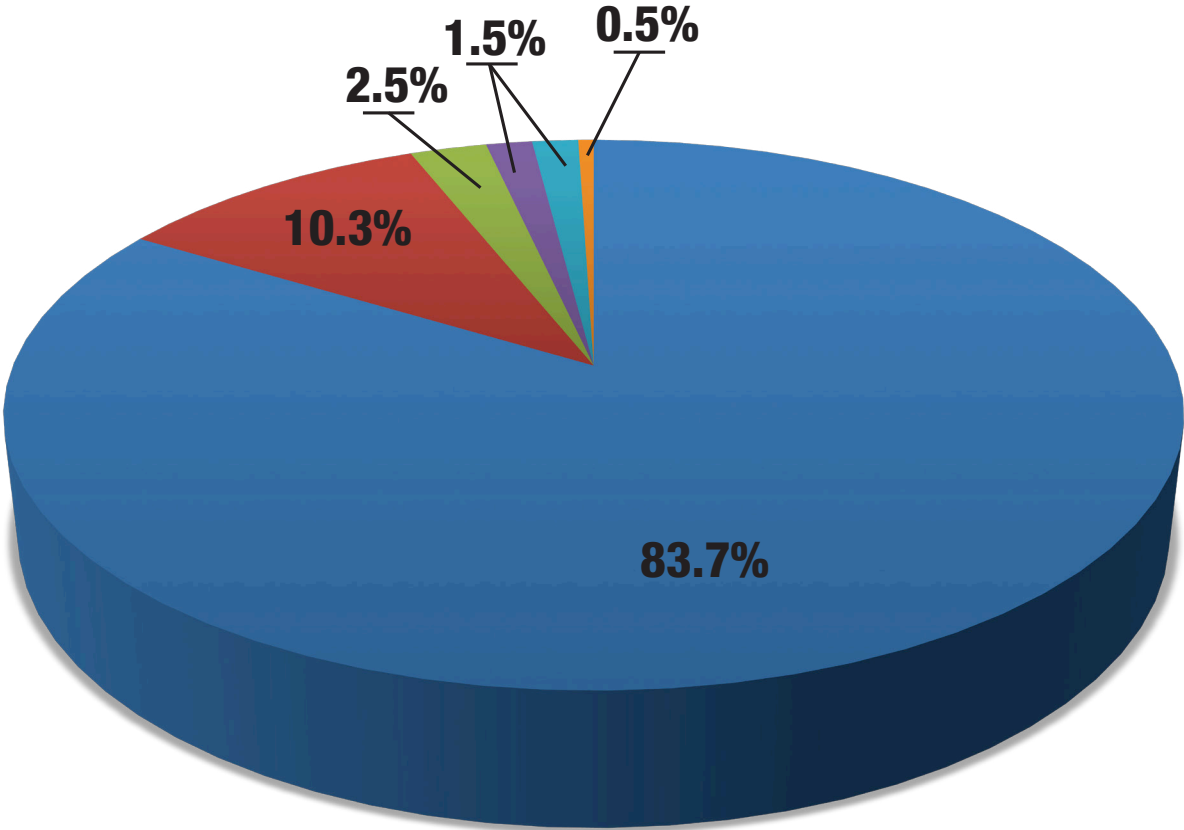
# NUMBER OF HD LENSES ON TRUCKS BY BRAND



# NUMBER OF HD TRUCKS BY MIC BRAND



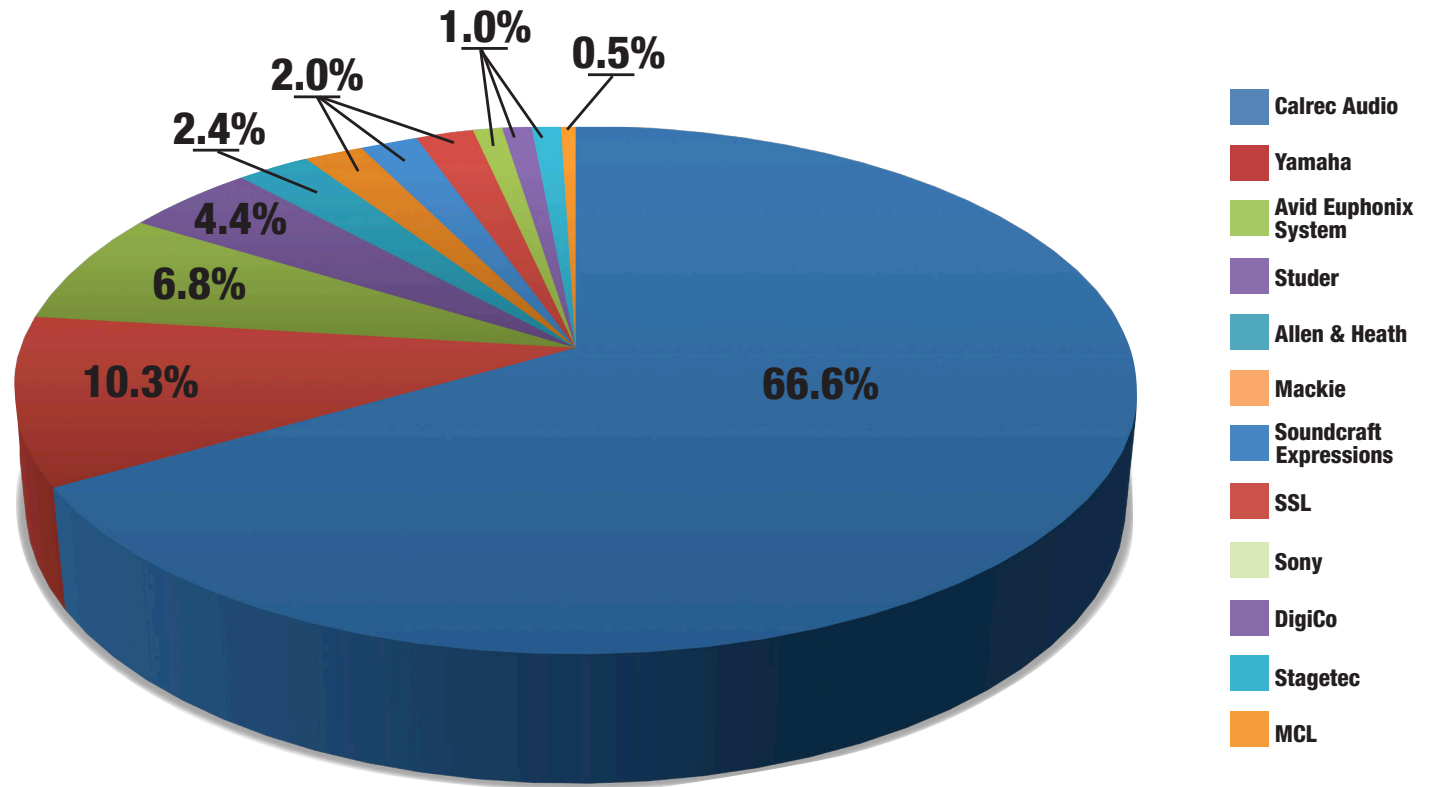
# PERCENT OF PRODUCTION SWITCHERS IN HD TRUCKS BY BRAND



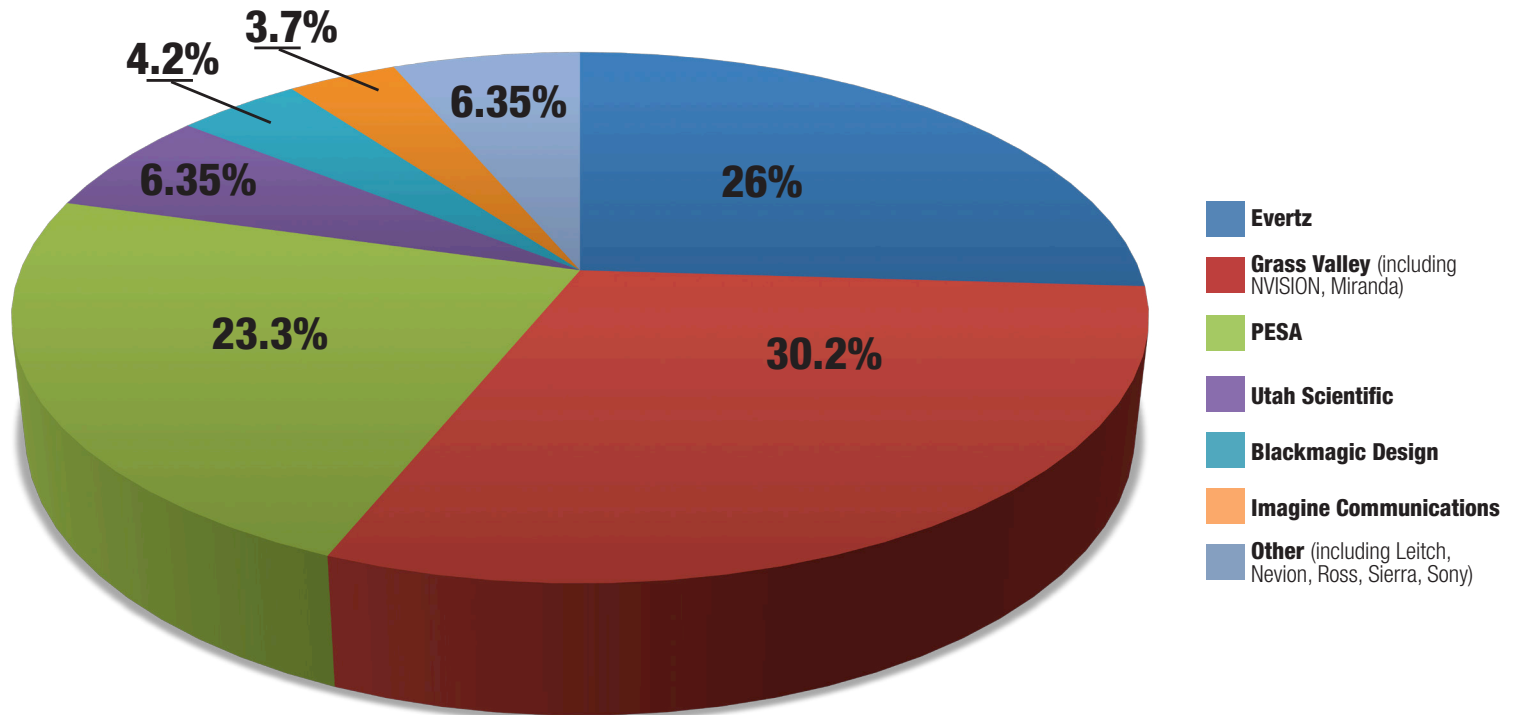
Grass Valley Sony Ross Blackmagic Design NewTek Panasonic



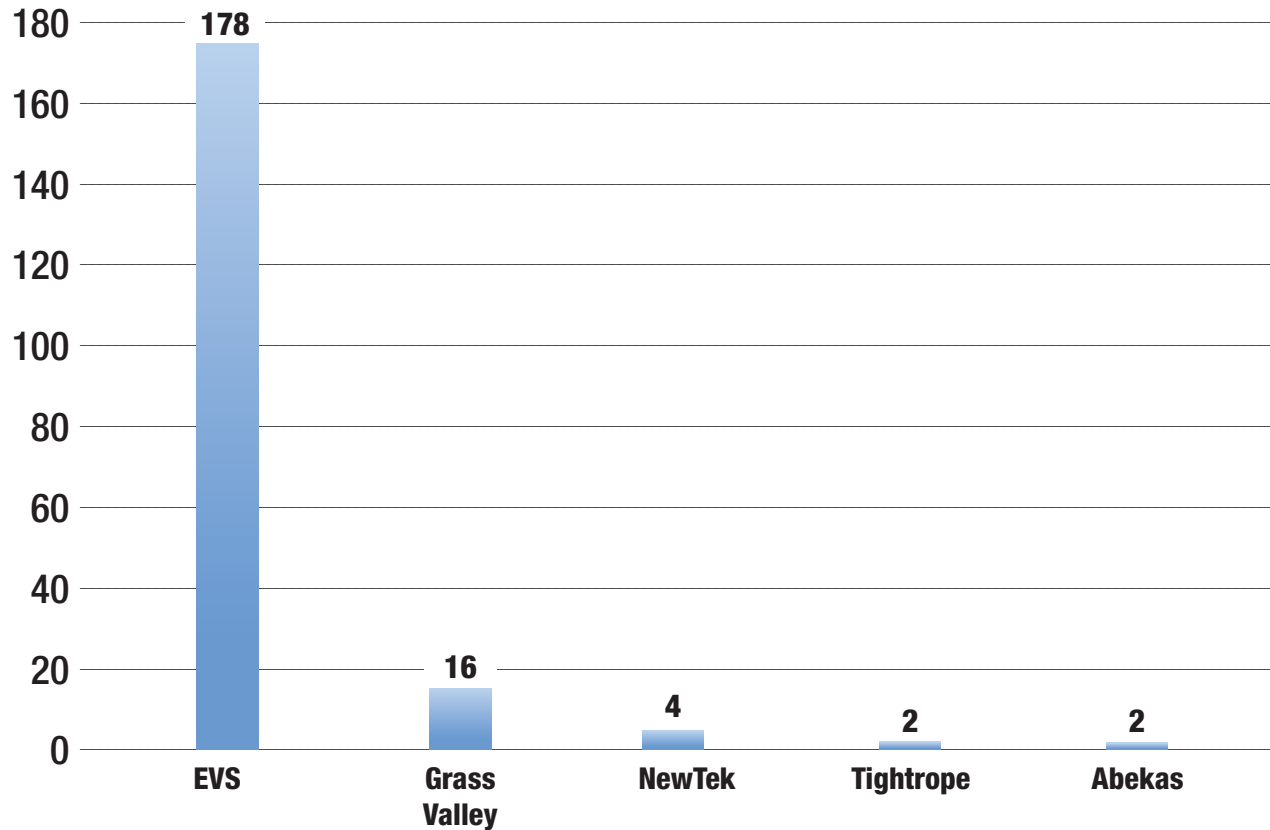
# PERCENTAGE OF AUDIO CONSOLES BY BRAND



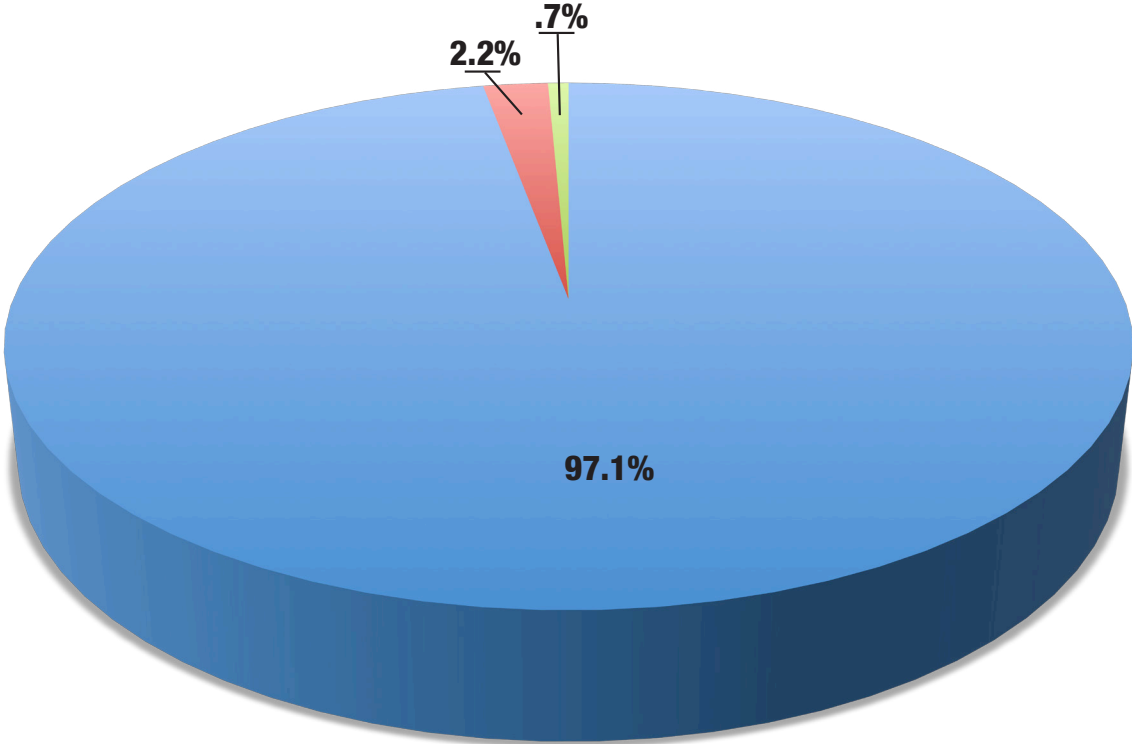
# PERCENTAGE OF VIDEO ROUTERS BY BRAND



# NUMBER OF TAPELESS REPLAY DEVICES BY BRAND



# PERCENT OF HD TRUCKS BY GRAPHICS BRAND



**ChyronHego**   **Ross Video**   **NewTek**

