# Sizing the Global Professional Flash Media Market

By Douglas I. Sheer, CEO & Chief Analyst,
D.I.S. Consulting Corporation, Woodstock, N. Y. (USA)
www.disresearch.com dougsheer@gmail.com

# Considering the User Segments

- Professional Video Segments ~ Broadcast/Cable, Prod/Post, Mobile/OB, Event, Independents, Institutional (Corporate, Educational, Medical, Religious and Governmental), Rental House, Sports, Digital Cinematography, etc.
- Professional Audio Segments ~ Radio Station, Recording Studio, Institutional, DJ, Staging, Editing, etc.
- Professional Graphics and Pre-Press ~ Work Stations et al
- Professional Still Photographic ~ Studio, Nature, Portrait, Journalism, Sports, Fine Art, etc.
- Film & TV Students ~ We call them Pre-Professionals

# Related D.I.S. Studies:

- *Professional Camcorders World tm 2015*
- *Digital Cinematography World tm 2015*
- *Studio / Box Cameras World tm 2015*
- *Sports Video World tm 2014*
- *Broadcast Servers World tm 2014*

# Typical Retention of Recordings

- Generally, about 14% retain originally recorded materials ON the flash drive, without erasure – in physical ‘libraries’ – for extended periods
- Units stored in such libraries are 25% likely to be in long-term retention (greater than one year)

# Typical slot (drive) locations

- Solid State A-V Recorders / Players
- Camcorders, Cameras and D-SLRs
- PCs, laptops and mobile devices
- Editing and graphics systems
- Servers and Storage Systems
- Displays

# Estimation of total drive slots

- Among all flash-using devices in professional hands our estimation is that there are a global total of 10.1 million drive slots, capable of recording to or playing from flash media

# Typical Use Patterns

- Most flash media – 75% -- is utilized for original capture (for field or studio recording)
- Most content is retained on flash drives for less than one month (before hard drive load)
- 5 re-uses, before discarding, is common
- More flash is used in editing, graphics, audio, plus adding ‘rich media’ (stills, maps or clips)

# Most Common Capacity

- 64GBs is the most commonly reported single-unit flash storage capacity
- Capacity needs are increasing with rising demand for RAW recording (a qualitative impact)
- Virtually ALL responses indicate bigger demands

# Estimated owned/installed flash

- Users own 102 Million Flash Cards today
- Average purchase price per unit is $39.85 and their residual value is $4.1 Billion
- There are 10.1 Million Slots available today
- Current flash usage per annum 20.2 per slot
- 2014 purchases = 9.3 Million = $372 Million
- 2015 plans = 10 Million = $398 Million

# User Concerns



- Accidental erasure or crashes of hard drives (desire to retain flash)
- Lifespan of recording and playback per flash unit before degradation
- Increasing needs with RAW recording
- Hacking, errors and magnetic vulnerability
- Lack of standardized slots among devices

# Manufacturer Concerns



- With increased capacity comes lower prices and a challenge to profitability
- Potential for a slowing of the media economy due to reduced staffing
- Overly competitive brand environment

# Potential changes coming

- Greater capacity per unit
- Lower cost per unit
- Disruptive products that will compete with flash may be on the horizon

# Conclusions

- A substantial mass of flash use among media professionals
- Growth in flash-using media slots
- A healthy growth in new flash purchasing
- Increasing use of flash media for capture
- Increasing storage capacity per unit
- Lower prices per unit

Average number of slots per user 4.2

# Sizing the Global Professional Flash Media Market

Douglas I. Sheer, CEO & Chief Analyst,
D.I.S. Consulting Corporation, Woodstock, N. Y. (USA)
www.disresearch.com dougsheer@gmail.com
(917) 692-0975