



**United States Microwave Link Equipment
Used in Electronic News Gathering/Outside Broadcast
Market Review and Forecast (2010-2017)**

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In 2010, conditions in the US commercial microwave link equipment marketplace, specifically addressing the Electronic News Gathering / Outside Broadcast (ENG/OB) industry sectors, improved versus 2009. TV advertising expenditures were up in 2010 and moving into 2011 in most markets, compared to the difficulties caused by the economic downturn back in 2009. The financial crisis, initially referred to in the media as a "credit crunch" or "credit crisis" and upgraded by many in terminology to "GD-2" (Great Depression number 2), which began back in July 2007. The economic downturn greatly affected the advertisement revenues of the television broadcasters (TV stations); thereby forcing a decline in ENG/OB expenditures for microwave link equipment.

In terms of consumption value, however, the United States' microwave link equipment market increased only 2.2% in 2010 versus 2009, due to the fact that the average selling price (ASP) of devices decreased and therefore, partially offset value gains.

This study report provides 2010 market data review, plus 2011-2017 market forecast of selected microwave link products, which are used by the Electronic News Gathering/Outside Broadcast (ENG/OB) industry sectors in the United States, as detailed in Table 1.

Table 1
Microwave Link Equipment Category List

Transmitter: Central (5.8 GHz and Lower)
 Transmitter: Central (Higher than 5.8 GHz)
 Transmitter: Portable (5.8 GHz and Lower)
 Transmitter: Portable (Higher than 5.8 GHz)
 Transmitter: Wireless Camera/Mountable (5.8 GHz and Lower)
 Transmitter: Wireless Camera/Mountable (Higher than 5.8 GHz)

Receiver: Central (5.8 GHz and Lower)
 Receiver: Central (Higher than 5.8 GHz)
 Receiver: Portable (5.8 GHz and Lower)
 Receiver: Portable (Higher than 5.8 GHz)

Antenna: Fixed/Installed (Central/Station/Tower)
 Antenna: Standalone Portable (Field/Van/Avionic)

A microwave link is a communications system that uses a beam of radio waves in the microwave frequency range to transmit video, audio, or data between two locations, which can be from just a few feet or meters to several miles apart. Mobile units can be camera mounted, allowing cameras the freedom to move around without trailing cables. These are often seen on the touchlines of sports fields on stabilized camera apparatus systems.

In this particular ElectroniCast study, we covered microwave technology used in communication with satellites and relay links for Electronic News Gathering (ENG), Outside Broadcast (OB) and Live Event Coverage.

ElectroniCast presents the market analysis and forecast, segmented by the four main regional divisions used by the United States Census Bureau, as listed below:

- Northeast United States
- Midwest United States
- Western United States
- Southern United States

Note: It is often difficult to segment the region in which the device is consumed; therefore, ElectroniCast then assigns its use to the region of the US headquarters (HQ) of the business entity that controls the use of the device.

The market forecast data are presented for the selected microwave link products, segmented by the following functions:

- Consumption Value (US\$, million)
- Quantity (number/units)
- Average Selling Prices (ASP \$, each)

The consumption value is determined by multiplying the number of units by the average selling price. The average selling prices are based on the price of the devices at the initial factory level. The consumption values are based on the end-user application and the end-user region.

Chapter 2 includes the USA (*total market*) forecasts and demand analysis, in regards to the selected microwave link products covered in this study report, as well as the specifications and technology overviews.

Chapter 3 includes the USA regional (*geographic market*) forecasts and demand analysis, in regards to the selected microwave link equipment.

Chapter 4 provides an analysis of competitive environment, relative to ENG/OB customer sector in the United States.

- List leading competitors and/or related companies
- Company Profile Briefs
- 2010 market share estimates of leading competitors
- SWOT analysis of leading competitors

Chapter 5 provides an overview of operating frequency and modulation technology

Chapter 6 provides an explanation (tutorial) of the Research Methodology.

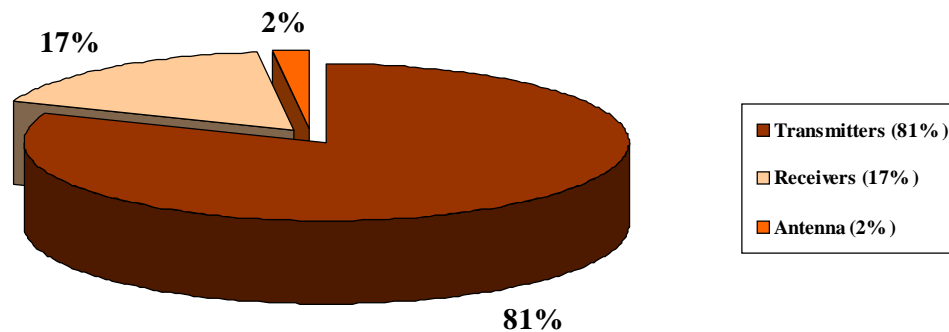
Chapter 7 provides an explanation (tutorial) of the Microsoft Excel Database Spreadsheet, which details the 2010-2017 market forecast.

The actual market forecast database/ (Excel spreadsheet) and PowerPoint slides are provided in the addendum of this report.

Transmitters are the Market Leader The 2010 consumption *value* of ENG/OB and Live Event microwave link equipment was led by transmitters, with the 81% of the relative market share, as shown in Figure 1. The transmitter category is forecast to increase at an average annual growth rate of 3.7 percent (2010-2017).

In terms of *volume* (the number of units), all three top-level equipment-types (transmitters, receivers and antennas) are forecast for moderate and steady growth during the 2010-2017 timeframe; however, the declines in average selling prices (ASPs) will partially counteract consumption values.

Figure 1
2010 USA Product-Type Market Share (%) of Microwave Link Products
Used in ENG/OB, (Based on Consumption Value)
Source: ElectroniCast Consultants



Note: Market forecast data in this study report refers to consumption (use) for a particular calendar year; therefore, this data is not cumulative data.

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Addendum

- Excel Data Base Spreadsheets (USA Total/Regional Market Forecast)
Detailed Data: ASP (\$, each); Quantity (Million); Value (\$, Million) for all four (4) Regions
- Power Point Market Data Figures (USA Market Forecast)

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