

PROGRESS REPORT

their accomplishments.

Members of SMPTE's New England Section will engage in several other similar efforts with the Civic Symphony Orchestra of Boston in the coming year.

It is planned that the Student Section at Mashpee High School and perhaps students from Stonehill College may engage in a collaborative effort with the Civic Symphony once again. It is hoped that our long-established Student Chapter at Fitchburg State College might also be able to participate in such a joint effort.

The bottom line of this report is quite simple: We discovered that 16 x 9

aspect shooting is not "Rocket Science." For educational and experimental purposes, standard 4 x 3 aspect gear can be readily "adapted" in a creative and inexpensive way. The opportunities abound out there for projects to experiment with, be they single-camera efforts or, as in our case, a 7-camera live shoot project. After all, when a 75-member professional orchestra invites you to videotape their performance, and gleefully submits to your erecting an array of seven or more cameras all around them, such is a marvelous opportunity for experimentation and education with our evolving electronic media.

We would have lost a great opportunity for development and inspiration had we not seized the moment and created the masks for 16 x 9 coverage.

The entire project is in post-production, having been mastered on U-matic SP, with S-VHS backup, using HiFi audio on the S-VHS for primary audio. The project is due for January 1999 completion, but as with many special projects, may slip a little into the early spring of 1999. Be assured that when it is completed, the SMPTE Educational Committee will have as many dubs as they require, and the tapes may enjoy wide circulation within the educational and experimental community.

HOPE REPORTS Thomas W. Hope

One of the major elements of the television and motion picture world served by the SMPTE is the production company. The largest producer segment, in terms of the number of companies, are the industrial contract producers who make up 47% of the U.S. total of 23,000. The other segments are entertainment producers, television commercial producers, captive in-house units,* documentary and proprietary—those turning out programs to sell off-the-shelf such as educational subjects.

The industrial contract producers in 1998 had a stellar year after a scary summer slowdown. Fear of a possible recession held off new programs for a few months. Industrial producers on the West Coast, and particularly Hawaii, felt the crunch of the Asian economic downturn all year.

What for years was termed the nontheatrical film industry has broadened to encompass a host of new media, both motion and still. The word "audiovisual" became a truly

unique generic term and still is used worldwide. As new technology has been pouring out of research laboratories, terminology has become a problem. Audiovisual, versus such names as media and communications, is still the best to encompass computer, digital, video, and traditional film technology.

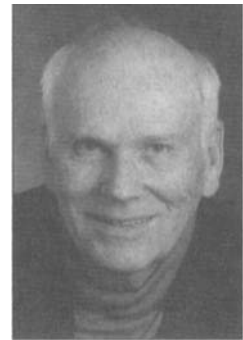
A Small Business Industry

This report pertains primarily to the 10,700 production companies best described as industrial contract producers.

Each year since 1995, *Hope Reports* has scoured the country to determine the 100 largest industrial contract production companies. The search does not encompass the 500 contract production companies specializing in producing national television commercials. By the time this report appears in the *SMPTE Journal*, the 1999 Top 100 will be well under way, based on 1998 production data. In the meantime, the basis for this 1998 review makes use of 1997 data (Table 1).

In 1997 the 100 largest industrial contract production companies in the U.S. had combined gross revenue of \$1.2 billion. That was 20.4% of the

total revenue for the 10,700 industrial producers, a respectable 21% increase from the previous year's \$1.01 billion. The largest company, in 1997, had gross revenue of \$150 million while the 100th company grossed \$2.2 million. There were more than 10,000 that did less than \$2 million in 1997.



Thomas W. Hope

Production Trend

Industrial contract production in 1997 increased 14.4% while other activities, principally meetings and staging, rose 28.4%. The production increases ranked in order from best to poorest were audio, live television, multimedia, film, Internet, and video. The strong meeting/staging reflects a healthy American economy in 1997; that same strength is expected in the 1998 results. The '90s have been remarkably good, ever since the recession that ended early in 1991.

Changing Presentation Business

In recent years a new development has swept over the contract production world—acquisitions. As they

* Television networks and stations, corporate in-house production units, government, university, and organizations.

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broaden their market reach, major industrial contract production companies have been buying up smaller companies. Four of the country's largest producers led the surge: Caribiner Communications, iXL/

Interactive Excellence, the Jack Morton Co., and PGI, Inc.

Another emerging trend involves hotel presentation services. Over the past few years, audiovisual dealers have established AV operations in

hotels. Today well over a thousand hotels have one to four full-time persons in-house to handle all AV requirements; two of the largest are Marriott (Molloy Corp.) and Caribiner.

TABLE 1. TOP 100 INDUSTRIAL CONTRACT PRODUCERS OF 1998.

Company	City/State	Company	City/State
ACG Communications	New York, NY	Jack Morton Company, The	New York, NY
AMS Productions Inc.	Dallas, TX	Killingsworth Presentations	Lake Forest, CA
Artisan Picture Works Ltd.	Atlanta, GA	Kinetic Corporation	Louisville, KY
Ashe/Bowie Productions, Inc.	San Antonio, TX	Larry Miller Productions	Cambridge, MA
AudioVisual Communications, Inc.	King of Prussia, PA	Lieberman Productions	San Francisco, CA
AVID Group, Inc.	Chicago, IL	Light & Power Productions Inc.	Schenectady, NY
Big Shot Productions	Baltimore, MD	Maritz Performance Improvement Co.	Fenton, MO
Broadcast Production Group	Campbell, CA	Martin Bastian Productions, Inc.	Minneapolis, MN
Burson Marsteller Production Grp	New York, NY	McDougall Creative Inc.	San Francisco, CA
Busch Creative Services	St. Louis, MO	McHale Video/Film	Honolulu, HI
Business Video Productions	Tampa, FL	Medi Cine Inc.	New York, NY
BVP Media Inc.	Englewood, CO	Media Design Group	Winter Park, FL
California Image Associates	Rancho Cordoba, CA	Media Loft, Inc.	Minneapolis, MN
Caribiner Communications	New York, NY	Mills/James Productions	Columbus, OH
Center City Film & Video	Philadelphia, PA	Mindsight	Des Plaines, IL
CKS Pictures	Cupertino, CA	MIRA Creative Group	Portland, OR
Classic Worldwide Prods.	Cleveland, OH	MJM Creative Services	New York, NY
Closer Look Creative, Inc.	Chicago, IL	Motivation Media, Inc.	Glensview, IL
Colorado Production Group	Denver, CO	Multi Image Group	Boca Raton, FL
Convergent Media Systems	Atlanta, GA	MVP Communications	Troy, MI
Corporate Arts, Inc.	Phoenix, AZ	NFL Films	Mt. Laurel, NJ
Corporate Magic	Irving, TX	North By Northwest Productions	Spokane, WA
Corporate Visions	Washington, DC	Northwest Teleproductions	Minneapolis, MN
Cramer Productions	Norwood, MA	Orbis Broadcasting Group	Chicago, IL
Creative Media Development	Portland, OR	Pacific Focus	Honolulu, HI
Cresta Group, The	Chicago, IL	Paddock Productions	Overland Park, KS
CSI MultiMedia	Perth Amboy, NJ	PGI, Inc.	Arlington, VA
Curtis, Inc.	Cincinnati, OH	Praxis Media Inc.	So. Norwalk, CT
DElia-Wittkofski Prod.	Pittsburgh, PA	Presentation Source, The	New York, NY
EagleVision Productions, Inc.	Santa Clara, CA	Production Masters, Inc.	Pittsburgh, PA
EDR Corporation	Cleveland, OH	PVI Communications, Ltd.	Arlington Heights, IL
EPI Communications	Rockville, MD	Quantic Communications	Andover, MA
Excel Communications, Inc.	Milwaukee, WI	Regan Film Productions	Detroit, MI
Five Star Productions, Inc.	Del Ray Beach, FL	Ross Roy	Bloomfield Hills, MI
Frontier Media Group, Inc.	Malvern, PA	Sanders Group, The	Indianapolis, IN
Fusion Productions	Webster, NY	Santeler Marketing Group	Redwood City, CA
Gardy-McGrath (Int'l), Inc.	Reston, VA	Scene Three, Inc.	Nashville, TN
Great Scott Productions	Phoenix, AZ	SOS Productions	Columbus, OH
Gulliver Ritchie Associates	Norcross, GA	Stone Core Films, Inc.	Dallas, TX
Image Associates, Inc.	Raleigh, NC	Tam Communications	San Jose CA
Image Base	Chicago, IL	Television Associates, Inc.	Mountain View, CA
Impact Communications Inc.	Cleveland, OH	Tri-Film Productions	Kirkland, WA
Impact Communications, Inc.	Morristown, NJ	Tyee Group Inc., The	Portland, OR
In-Seitz, Inc.	Rochester, NY	Venture Productions	Pompano Beach, FL
In-Vision Communications	Walnut Creek, CA	Video Impressions	Aurora, IL
Innervision Studios	St. Louis, MO	Video West Productions	Salt Lake City, UT
Instant Replay Video	Cincinnati, OH	Visual Services Inc.	Bloomfield Hills, MI
Iowa Teleproduction Center	W. Des Moines, IA	VSI Communications Group	So. Norwalk, CT
IVM, Inc. / Video Wisconsin Inc.	Brookfield, WI	White Hawk Pictures, Inc.	Jacksonville, FL
iXL/Interactive Excellence	Atlanta, GA	Williams Gerard Prod.	Chicago, IL