

D.I.S. Consulting

C O R P O R A T I O N

Publishing syndicated market research surveys in media technology markets since 1982

Broadcast Automation World™ 2009

Publication Date: March 2010

General Overview:

Broadcast Automation World™ 2009 is the third global Broadcast TV Automation systems survey conducted, covering broadcast & audio-video related automation software and hardware amongst broadcasters and other professionals and, has become the most comprehensive syndicated market research survey ever conducted regarding these products.

Market Sectors covered Include:

- 1) Broadcast TV & Cable stations, groups and networks,
- 2) Broadcast-oriented production service providers and studio production facilities
- 3) Institutional (Government, Education, Religious, Medical & Corporate)
- 4) Telephone Companies and PTT (Telcos) facilities, in terms of product and market coverage, influences and overall reporting detail.

In March of 2010, D.I.S. published a comprehensive report, showing all results in Total (all sub-markets) and one report each for the four (4) major geographic regions (USA, EMEA, Asia-Pacific and the Americas). Those reports are modularly available for purchase.

Regions:

This tracking survey covers 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 facility segments.

Key Issues:

Professionals often use automation for Play-out, News, or Studio Production, as well as for Media Management. Among key issues that were clarified by BAW 2010 are: number of channels automated by installation, devices managed through installation, storage styles, software types, market trends (such as central cast, file-based ingest, supervision and monitoring, outsourcing), interface with NRCS and traffic, storage capacity in bytes and hours/days, automation workflows, use and preference for type and brands of systems perception and preference for new technologies, types of 'rich media' stored and manipulated, and many other technology trends attendant to automation in broadcast and professional environments. (servers are studied separately in our *Broadcast Servers World™ 2010* global report as are storage issues in *Media Storage World™ 2010*—both annual reports conducted by D.I.S.).

- Number of Channels Automated by/Managed Through Installation
- Automation Styles
- Market Trends
- Central Cast
- File-Based Ingest
- Supervision and Monitoring
- Outsourcing

- Interface with NRCS and Traffic
- Capacity in Bytes and Hours/Days
- Types of 'Rich Media' and / or Devices Automated
- Automation Work flows
- Major Market Drivers and Impediments
- Installed Base, Past 12 month purchases (2009), future 12 month purchases (2010)
- Five-Year Industry Forecast

Broadcast Automation - Not So Automatic

Up until 2009 and for several decades previously, the drive to automate stations and facilities has been attracting heavy interest and substantial purchasing. Then the crash of fall 2008 arrived and put a big damper on the market for automation systems and left many wondering 'was the game up?' The D. I. S. Consulting new automation survey, *Broadcast Automation World tm 2009*, just published, reveals what really happened in 2009, and more importantly what is likely to occur in 2010 and beyond.

Based on end-user feedback:

Just as in our previous editions, we based our analysis on nearly 1,000 end-user responses which were mainly completed on-line at our user-friendly questionnaire. Once tabulated, that data was charted in Excel, written and analyzed. Users from broadcast, cable, production/post and institutional sites were tallied. Four regions: USA, EMEA, Asia and the Americas were sorted.

High Points - Major Trends:

- Major slowdown in 2009 was seen, leaving only a handful of brands with any substantial sales
- Saturation has occurred in some segments and regions
- Modest growth in 2010 and beyond in some segments, some applications and some regions such as Asia

Deliverables:

The sponsors receive a CD-ROM copy of the survey results for those regions they have sponsored and/or for the global totals if they have sponsored the survey on a global level. 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.

Sample Frame and Lists Sourced:

The *Broadcast Automation World™ 2009* project used a fresh list of the television stations and production or post facilities from IBC, NAB, Broadcast Asia and the Broadcasting & Cable magazine's Broadcasting & Cable Yearbook by Reed Elsevier Business Lists, a division of Cahner's Direct Marketing Services for cable. That culling targets editors and chief engineers or the equivalent executives at global TV and cable stations. Production and Post-Production 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, The World Guide to Film & TV and specialized in-country directories are used.

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.

The Market and Minimum Response Level Sought: 1,200 Respondents (916 were received)

This tracking survey covers four regions:

1. USA 2. EMEA 3. Asia 4. The Americas

Market Segment & Regional Universe					Responses Sought**
Vertical Market	United States	EMEA	Asia	Americas	
Broadcast	130	130	90	50	400
Cable	130	130	90	50	400
Production/Post-Production	70	70	60	30	230
Institutional Facilities	60	60	30	20	170
Total User Markets	390	390	270	150	1,200

Lists by Region and Marketplace				
Markets	USA	EMEA	ASIA	AMERICAS
Broadcast/Cable/Sat	NAB/SMPTE Broadcasting & Cable Ybk RTNDA	NAB/IBC/Kemps World Guide to Film & TV RTNDA	BA/IBC/NAB ABU/SMPTE World Guide	NAB/IBC World Guide Film & TV Set/Caper
Production/Post-Prod	NAB/SMPTE O'Dwyers	IBC/Kemps Compass	BA/IBC/NAB Kemps, etc.	NAB/IBC Set/Caper
Institutional	NAB/SMPTE Yellow Pages	NAB/IBC/Kemps Sonovision, etc.	BA/IBC/NAB Kemps/China	NAB/IBC guides SET/Caper
Telecos/PTTs	TBD	Persky	TBD	TBD

Report Table of Contents

FRONT MATTER:

Cover & Spines
Introduction & Methodology
Staff Page
Executive Summary
Industry 5-Year Forecasts

GENERAL REPORT:

Type of business
Size of operation
Leading Applications
Size of Budget
Budget Increasing, decreasing or remaining the same
Size of Revenues
Revenues increasing, decreasing or remaining the same
Type of storage applications
Number of employees
Number of staff having access to displays
Extent of purchase authority
ADI or comparable ranking
Type of station or facility

TECHNOLOGY TRENDS:

Type of automation applications
Departments responsible for automation systems
Workflow patterns
MPEG orientation and IP issues
HD orientation and transition
Computer platforms used
Disk drives versus tape drives
Year of first automation system purchased
Summary of key features of systems
Automation software used
Other automation workflow issues

MAGAZINES & TRADE SHOWS:

Trade Magazines read and preferred
Single most valued
Trade shows attended and planned
Single most valued

PRODUCT REPORT(S) - By vertical market

Number of Automation Systems (installed)
Number of Systems by brand
Number of units by brand, model, type
Value in dollars
Number of units owned
Number of units purchased in 2009
Value in dollars
Number of units planned for 2010
Value in dollars
Long term prospects for sales – 5 year forecast

BRAND IMAGE REPORT – By Genres

General criteria: Awareness and
Brand Image Rankings of major brands of displays
including:

- A) Price
- B) Quality
- C) Product Reliability
- D) After-sales-service

BRANDS TO BE INCLUDED -- But Not Limited To:

Avid/Sundance, Aveco, CIS, Comprompter, Crispin, Dalet, Dayang, Emblaze, Etere, Fission, Floral, Harris, Hitachi, IBIS, Omnibus/iTX, Keres, Microfirst, NEC, On-Air, Pebble Beach, Pharos, Pilat, PlayBox, Pro-Bel/Morpheus (Snell), S4M, SeaChange, SGT, Siemans/Colledia, Sobey, Sony, SUN, TMD, Toshiba, Thomson/GVG, Weggener and others.

ADDENDUM:

Breakdown of responses & copy of questionnaire

See questionnaire for final pre-listings of brands.

Format of Reporting Data:

Summary tables, color Excel charts, graphs and the written summary section show both quantitative and qualitative results in each section or product category. Tables show full corporate results and regional information for all survey questions and the entire research report is delivered on a CD Rom. Three types of reports are available:

1. PRODUCT REPORT

- Automation Systems product category By Major Application
- Unit and market value data
- Brand market shares
- Installed base (owned)
- Purchases in the past 12 months and value (2009)
- Plans to buy in the next 12 months and value (2010)
- Prospects for out years (5-year forecasts)
- Custom reports available (cross-tabulation)

2. GENERAL MARKETING & MEDIA

- Trends relating to the overall state-of-the industry
- Equipment budgets and buying habits
- Demographics
- New Technologies, applications and trends, such as IP
- Revenues
- Trade magazine readership and trade show attendance and preference

3. BRAND IMAGE

- Brand image ratings for pre-fielded, 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, price and quality
- Ratings compared by brand, and by each factor, as well as by overall composite brand image.
- All charts also show the industry average

Methodology:

As in previous years, D.I.S. has consulted with all of its front-end sponsors as well as with those companies not sponsoring the survey, in the effort to be as comprehensive reading brands and models as well as salient and accurate technology trends gathering. Clients were extremely helpful in aiding in the design of the questionnaire...and in recommending improvements to the process.

The transition in 2004 from the exclusive use of hard copy direct mail to our new method began as a combination of Direct mail collection grouped with the CATI houses and the on-line website (both using a synchronous questionnaire) where we collected the responses and data entered all of them for tabulation purposes. D.I.S. Consulting Corporation's new software and structure permits nearly endless cross-tabulations or correlations of different aspects of the questionnaire (consult with us if you want a special cross-tabulation done).

We invited professionals to the website – enrolled them – and collected their individual product data using an on-line method. Up to date mailing lists were used including the freshest (international) NAB attendee list, the similar IBC list (also international) as well as numerous other industry sourced mailing lists like Kemps International. All of them were also merged together to form an e-mail list for domestic and international calls.

Incentives:

Survey respondents will receive a *Broadcast Automation World™ 2009* DIS-covery Trends report for their help, estimated to be worth \$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.

Staff Experience:

D.I.S. Consulting Corporation maintains seven regular staff and utilizes a project staff of seven others on its syndicated projects. This core research group is augmented by the use of other freelancers, as appropriate, for the individual projects undertaken.

Pricing and Terms:

Pricing is based on the number of regions and product categories desired. Each product category purchase includes the general reports. Brand image reports are included only with a purchase of three or more regions and/or product category reports. Pre-publication sponsor prices are lower than post prices.

Broadcast Automation World™ 2009	* Pre-Publication Prices	Post-Publication Prices
The third annual Global Market Survey	(-20% Discounted)	Orders After Publication

Report Type*

*Purchases which occur approximately three months before publication,

Offers a 20% discount off of post-publication price

Pre-Publication*	\$9,950 USD
Post-Publication	\$12,050 USD

Regional Reports		
<input type="checkbox"/> 1 region	\$5,950	\$7,140
<input type="checkbox"/> 2 regions	\$6,961	\$8,353
<input type="checkbox"/> 3 regions	\$8,144	\$9,772
<input type="checkbox"/> ALL 4 regions (Global FULL Sponsorship)	\$9,950 FULL GLOBAL	\$12,050 FULL GLOBAL
<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/product genres

NAB Associate Member Discount for D.I.S. Consulting Full Report

Gross Related Revenue	Purchase Price	Total Discount**
\$10,000,001 and UP	\$9,452	\$2,598
\$5,000,001 - \$10,000,000	\$8,452	\$3,598
\$1,000,001 - \$5,000,000	\$7,952	\$4,098
\$750,001 - \$1,000,000	\$7,452	\$4,598
\$500,001 - \$750,000	\$6,952	\$5,098
\$350,001 - \$500,000	\$6,452	\$5,598
\$200,001 - \$350,000	\$5,952	\$6,098
\$0 - \$200,000	\$5,452	\$6,598

Conditions:

Published reports must be paid in full at time of purchase

Reports purchased with future publication date are paid 50% in advance and 50% upon delivery of report

* All prices are shown in USD

* 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.

Overall Design:

The design of Media Storage World tm 2010 is based on other benchmark survey, and 38 years of experience that Douglas I. Sheer, D.I.S. Consulting Corporation's CEO, has had in a variety of marketing, publishing, advertising, consulting and research positions and, on the 29-year record his firm D.I.S. 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 1,400 industry clients. D.I.S. Consulting Corporation also conducts numerous custom projects each year and publishes 28 global reports annually.

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