

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 Servers World™ 2012

To be published: March 2012

Survey Description

General Overview:

Broadcast Servers World™ 2012 is the seventh tracking/global report of broadcast media servers. It is a follow-up of five previous global server reports, which were the most comprehensive syndicated market research surveys ever conducted regarding servers, globally, among TV and Cable stations, production and post-production and institutional facilities. Like the previous global server reports *BSW 2012* covers product and market, influences and overall technical reporting detail. In all, five (5) major geographical regions are covered.

Sectors Covered Include:

1. Broadcast
2. Cable
3. Production/Post-Production Facilities
4. Institutional Facilities

World regions include:

- USA
- Europe
- Middle East, and Africa
- Asia-Pacific
- The Americas (including Central and South America).

The survey, in terms of product and market coverage, is far reaching and overall reporting detail focuses on those market segments of interest to the client, including installed base (number and type of broadcast server products owned), actual 2011 and anticipated 2012 purchases, and a 5-year forecast of all sales. In January, we will publish a comprehensive report, showing all results by type, sub-market and world regions surveyed. End-user data will be collected by an on-line survey and the data will be sorted and collected in an online database and analyzed, less unnecessary detail. There is even a 'leaders' summary' with key findings and an easy-to-read 'bird-eye view' made especially for senior executives.

Deliverables: The sponsors receive a CD-ROM copy of the survey results for those regions they have sponsored and/or globally if they have purchased the survey in its entirety. Our new reporting style features more analysis, more salient section summaries.

Sampling Plan

The Market, Universe Size and Response Levels That Are Sought is Based on 1,200 Completed Surveys.

We feel strongly that the proposed sampling plan closely follows manufacturer sales territories—for activity among broadcast, cable stations, production and post-production facilities, and institutional markets including other venues. The sampling plan (shown below) is an estimate of the total universe size in terms of number of sites and responses to the trends and products questions of the study from which projections are made.

SAMPLING PLAN

Vertical Markets	USA	Europe & M-E Africa	Americas	Asia-Pacific	Total Market and Regional Survey Response Anticipated*
Broadcast	97	57 / 40	45	60	299
Cable	97	57 / 40	45	60	299
Production/ Post Production Facilities	98	58 / 40	45	60	301
Institutional Facilities	98	58 / 40	45	60	301
Total User Markets	390	300/90	180	240	1,200

(# s = the number of anticipated responses sought) * estimated

D.I.S. Multi-Client Studies

Overall Design:

The design of *Broadcast Servers World™ 2012* is modeled after other benchmark surveys, and the 40 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, as well as 29 years that D.I.S. Consulting Corporation has conducted custom, large multi-client and proprietary end-user and dealer market research surveys in the professional imaging and communications sectors in the U.S. and Europe since 1982. In all, Sheer and his firm have served more than 1,500 industry clients.

Recent Studies:

Other multi-client studies include: *Video Editing World™ 2010*, *Video Graphics World™ 2010* and *Video Switchers World™ 2011*. Others, like *Professional Camcorders World™ 2011* were published in 2011. D.I.S. Consulting Corporation also conducts numerous custom projects each year.

Experienced Staff:

D.I.S. Consulting Corporation maintains ten regular staff and utilizes a project staff of five others on its syndicated projects. This core research group is augmented by use of other freelancers, as appropriate, for the individual projects undertaken. In all, D.I.S. publishes 28 reports annually.

Method Used

The Use of Syndicated Direct Mail:

The syndicated multi-client research methodology used by D.I.S. Consulting Corporation features a combination of a C. A. T. I. Telephone interviewing technique, as well as data collection via an on-line website. Installed equipment base is taken, census style, as well as information regarding 12 months of past purchases and future purchase plans over the next 12 months are also gathered. Other sections have questions on media and shows, equipment budgets, purchase authority, brand image, staffing and technological trends.

Incentives:

Survey respondents receive a *Broadcast Servers World™ 2012* end-user report for their help, which we estimate to be worth at least \$450 USD to them.

Clients Made Inputs to Questionnaire and Report Formats:

The questionnaire is designed to inventory installed brands and model 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.

List Sources, Sample Frame and Lists Sourced:

The *Broadcast Servers World™ 2012* project used a list of the television stations and production or post facilities from IBC, NAB, Broadcast Asia, *Broadcasting & Cable* both a magazine and a directory by Reed Elsevier Business Lists, a division of Cahner's Direct Marketing Services for cable. That culling targets chief engineers or the equivalent senior technology executives at each U. S. TV and Cable Station. Names of individuals from Production and Post-production facilities 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. Institutions are compiled via O'Dwyers Guide and other sources. The RTNDA list of news directors was also sourced to improve NEWS/ENG use coverage. Most audio listings are sourced from AES, Cedia, SPARS and APRS.

Avoiding Duplication:

An effort has been made to avoid overlapping and duplication in the lists utilized. A merge/purge program is run to sort and be sure that we only mail one questionnaire per targeted name.

Top Ranked Firms Targeted:

Naturally, we seek to target each major network, large stations and facilities and MSOs, worldwide. So, we cull such names and addresses from all the lists we use. In general, the aim is to make sure that the top ranked sites get hit and not missed in our sampling. This is key as they often represent a disproportionate share of where gear can be found.

Lists by Region and Marketplace

Markets	USA	EMEA	Asia	Americas
Broadcast/Cable/Radio	NAB/SMPTE Broadcasting & Cable Ybk	NAB/IBC/Kemps World Guide to Film & TV	BA/IBC/NAB ABU/SMPTE World Guide	NAB/IBC World Guide Film & TV SET/Caper
Institutional	NAB/SMPTE O'Dwyer's	NAB/SMPTE IBC	IBC/Kemp BA	BA/IBC/NAB SET/Caper
Production/Post-Prod	NAB/SMPTE Yellow Pages	NAB/IBC/Kemps Sonovision, Kays,	BA/IBC/NAB Kemps/China,	NAB/IBC BIRTV SET/Caper

Report Table of Contents

<p>FRONT MATTER</p> <p>Introduction & Methodology Preface & Purpose Staff Roles & Biographies Executive Summary Industry Forecasts</p> <p>GENERAL REPORT</p> <p>Type and size of operation Leading applications such as: VOD streaming, SANs, editing, ingest, play-to-air, Digital Cinema and more Size of budget Budget increasing, decreasing or remaining (2011/2012) Size of revenues Revenues increasing, decreasing, remaining (2011/2012) Number of employees Type of server applications Number of staff having access to servers Extent of purchase authority ADI or comparable ranking Type of station or facility</p> <p>TECHNOLOGY TRENDS</p> <p>The impact of IT/IP on servers Type of RAID storage utilized Maximum Storage Capacity Use of RAIS storage 'daisy chain' approach Cloud environments Use of SANs, NAS and clusters Type of server applications Departments responsible for servers Workflow patterns MPEG orientation and IP issues HD orientation and transition</p>	<p>Magazines and Trade Shows Trade magazines read, preferred, most valued Trade shows attended, planned, most valued</p> <p>BRAND IMAGE REPORT – BY GENRE General criteria for Brand Image Rankings Image rankings of major brands of servers including: For: a) Price, b) Quality, c) Reliability and d) After-sales-service</p> <p>PRODUCT REPORTS – BY GENRE</p> <p>By vertical market and region Number of systems owned (installed) Number of units by brand, model, type or series, channels by I/Os Value in \$ and number of units purchased in 2011 Value in \$ and number of units planned for 2012 Value in dollars Breakdowns by major application groups Longer term prospects for sales – 5-year forecasts</p> <p>With Brands to include (but not be limited to): 360 Systems, Accom, Avid/Pinnacle, Concurrent Systems, Doremi, DVS, EVS, Evertz, GEE Broadcast, Harris, Grass Valley, IBM, Leitch/ASC, Matco, Omneon, Quantel, Panasonic, Philips/BTS, SeaChange, Sencore/Adherent, Sierra Design Labs, H-P, Silicon Graphics Incorporated (SGI), Sony, Sun Microsystems, Tektronix, Vela, etc.</p> <p><i>(See for final brands in questionnaire)</i></p>
---	---

Format of Reporting Data

Summary tables, color Excel charts, graphs and a written summary sections show the quantitative results in each section or product category and are prepared using Microsoft Word™ 6.0, and Excel™ 7.0. The tables showing full corporate results and regional detail for all questions asked are also provided. The report is also available on computer disc. Below see report outline.

1. Product Report

- Server product genre category surveyed
- Unit and market value data in each
- Brand and leading model market shares
- Installed base (owned)
- Purchases in the past 12 months and value (2011)
- Plans to buy in the next 12 months and value (2012)
- Prospects for out years (5-year forecasts)
- Custom reports available (special cross-tabulations)

2. General Marketing & Media Report

- Trends relating to the overall state-of-the industry, like Cloud
- Equipment budgets and buying habits
- Demographics
- New Technologies, applications and trends
- Applications planned/used for, streaming, MPEG, IT/IP, 3D, 3Gig, etc
- Trade magazine readership and trade show attendance and preference

3. Brand Image Report

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

Pricing & Terms

With the purchase of the full report, in other words, three or more product categories, a client receives the Product Report, the General Marketing & Media Reports, as well as the Brand Image Reports. Pricing is based on the number of product categories requested. Pre-Publication Sponsor prices are lower than post publication prices. Please consult with us for a more customized project.

Broadcast Servers World™ 2012	Pre-Publication Prices	Post-Publication Prices
Report Type*	Orders <u>By</u> closing - 20% Discount	Orders <u>After</u> Publication
Regional Reports		
• 1 region	\$5,950	\$7,140
• 2 regions	\$6,961	\$8,353
• 3 regions	\$8,144	\$9,772
• ALL 4 regions – all product genres (Global FULL Sponsorship)	\$9,950 <u>Full GLOBAL</u>	\$12,050 <u>Full GLOBAL</u>
The following sections are FREE with the above packages OR available a la carte at the rates illustrated below		
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

*** Fifty-percent (50%) of the fee is due on subscription (sponsorship) with our invoice and the remaining fifty-percent (50%) of the payment is due on delivery of the report(s). 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.

Contact:

Douglas I. Sheer, CEO & Chief Analyst
DIS Consulting Corporation
Box 22
Livingston Manor, NY 12758 USA
E-mail: dougsheer@gmail.com
Tel: 917-692-0975
WWW.DISRESEARCH.COM