

# **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™ 2010***

To be Published: January 2010

### **Survey Description**

#### **General Overview:**

Broadcast Servers World™ 2010 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 2010 covers product and market, influences and overall technical reporting detail. In all, four (4) major geographical regions are covered.

#### **Sectors Covered Include:**

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

#### **World regions include:**

- USA
- EMEA (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 2009 and anticipated 2010 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 warehoused 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.

**Key Issues:**

- Where the recovery will be strongest
- How pressures on price are affecting profits
- Riding the 'Second Wave' of Servers
- HD and the Channel Build-outs
- How the solid state alternatives to HDDs are developing
- How the new brands are doing
- Expanding market in institutional uses
- Major market drivers and impediments

**After a Strong 2008...**

After a very strong 2008 for servers, the Recession caused a severe experience in 2009. The D.I.S. report clarifies where things were the worst. More importantly, as we ramp up to recovery from the economic downturn, D.I.S. is also able to pinpoint where the best sales will come from, who will benefit most and predicts the timing and heights to which the market will climb in the out years of the decade.

**Major Brands See Major Re-Shuffling of Rankings**

The Recession created a breathtaking decline that threw the server market into a frenzy and shuffled the positions of the major players more than ever before. This was made more severe by the economic status of some of those same companies. All saw re-alignments during the period.

**Specific Applications Versus Central Servers**

For some time, Central Servers ~ 'hub and spoke' ~ was the favored model for server use and Combined Uses the favored blending of applications. D.I.S. looks at how today application-specific servers are now dominating the scene.

## 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        | EMEA       | Americas   | Asia-Pacific | Total Market and Regional Survey Response Anticipated* |
|---|------------|------------|------------|--------------|--|
| Broadcast                                       | 97         | 97         | 45         | 60           | 299  |
| Cable   | 97         | 97         | 45         | 60           | 299  |
| Production/<br>Post<br>Production<br>Facilities | 98         | 98         | 45         | 60           | 301  |
| Institutional<br>Facilities                     | 98         | 98         | 45         | 60           | 301  |
| <b>Total User<br/>Markets</b>                   | <b>390</b> | <b>390</b> | <b>180</b> | <b>240</b>   | <b>1,200</b>   |

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

## D.I.S. Multi-Client Studies

### Overall Design:

The design of *Broadcast Servers World™ 2010* is modeled after other benchmark surveys, and the 41 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 28 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 1,400 industry clients.

**Recent Studies:**

Other multi-client studies include: *Video Editing World tm 2009*, *Video Graphics World tm 2008* and *Video Switchers World tm 2009*. Another, *Professional Camcorders World tm 2008* was published in the winter of 2009. 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™ 2010* end-user report for their help, which we estimate to be worth at least \$650 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™ 2010* 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**

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

## Report Table of Contents

|   |   |
|---|---|
| <p><b>FRONT MATTER</b></p> <p>Introduction &amp; Methodology<br/>         Preface &amp; Purpose<br/>         Staff Roles &amp; Biographies<br/>         Executive Summary<br/>         Industry Forecasts</p> <p><b>GENERAL REPORT</b></p> <p>Type and size of operation<br/>         Leading applications such as: VOD streaming, SANs, editing, ingest, play-to-air<br/>         Size of budget<br/>         Budget increasing, decreasing or remaining (2009/2010)<br/>         Size of revenues<br/>         Revenues increasing, decreasing, remaining (2009/2010)<br/>         Number of employees<br/>         Type of server applications<br/>         Number of staff having access to servers<br/>         Extent of purchase authority<br/>         ADI or comparable ranking<br/>         Type of station or facility</p> <p><b>TECHNOLOGY TRENDS</b></p> <p>Type of RAID storage utilized<br/>         Maximum Storage Capacity<br/>         Use of RAIS storage 'daisy chain' approach<br/>         Use of SANs, NAS and clusters<br/>         Type of server applications<br/>         Departments responsible for servers<br/>         Workflow patterns<br/>         MPEG orientation and IP issues<br/>         HD orientation and transition</p> | <p><b>BRAND IMAGE REPORT – BY GENRE</b></p> <p>General criteria for Brand Image Rankings<br/>         Image rankings of major brands of servers including:<br/>         For: A) Price, B) Quality, C) Reliability and D) After-sales-service</p> <p><b>PRODUCT REPORTS – BY GENRE</b></p> <p>By vertical market and region<br/>         Number of systems owned (installed)<br/>         Number of units by brand, model, type or series<br/>         Value in \$ and number of units purchased in 2009<br/>         Value in \$ and number of units planned for 2010<br/>         Value in dollars<br/>         Breakdowns by major application groups<br/>         Longer term prospects for sales – 5-year forecasts</p> |
|---|---|

|  |  |
|--|--|
| <p>Compression use<br/>Computer platforms used<br/>Disk versus tape<br/>Year of first server purchase<br/>Year of latest server purchase<br/>Use of Fiber Channel, Ethernet or SCSI<br/>Troublesome problems such as crashes<br/>Summary of key features of servers<br/>Number of channels now used<br/>Number of channels planned<br/>Automation software used<br/>Other systems servers integrate with<br/>Other issues</p> <p><b><i>Magazines and Trade Shows</i></b><br/>Trade magazines read, preferred, most valued<br/>Trade shows attended, planned, most valued</p> | <p><b>With Brands to include (but not be limited to):</b></p> <p>360 Systems, Accom, Avid/Pinnacle, Concurrent Systems, Doremi, EVS, GEE Broadcast, Thomson, IBM, Leitch/ASC, Matco, Omneon, Quantel, Panasonic, Philips/BTS, SeaChange, Sencore/Adherent, Sierra Design Labs, Silicon Graphics Incorporated (SGI), Sony, Sun Microsystems, Tektronix, Vela</p> <p>(See Brand Image and in Product Sections to locate name brand in the questionnaire)</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**

- 5 video testing product genre categories 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 (2009)
- Plans to buy in the next 12 months and value (2010)
- 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
- Equipment budgets and buying habits
- Demographics
- New Technologies, applications and trends
- Applications planned/used for, streaming, MPEG, 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 (April 2008 and beyond). Please consult with us for a more customized project.

| <b>Broadcast Servers World™ 2010</b>  | <b>Pre-Publication Prices</b>           | <b>Post-Publication Prices</b>  |
|---|---|---------------------------------|
| <b>Report Type*</b>   | <b>Orders By closing - 20% Discount</b> | <b>Orders After Publication</b> |
| <b>Regional Reports</b>   |   |                                 |
| • <b>1 region or global product genre</b>   | \$5,950                                 | \$7,140                         |
| • <b>2 regions or global product genres</b>   | \$6,961                                 | \$8,353                         |
| • <b>3 regions or global product genres</b>   | \$8,144                                 | \$9,772                         |
| • <b>ALL 4 regions – all product genres (Global FULL Sponsorship)</b>   | \$9,950<br><u>Full GLOBAL</u>           | \$12,050<br><u>Full GLOBAL</u>  |
| <b>The following sections are FREE with the above packages OR available a la carte at the rates illustrated below</b> |   |                                 |
| <b>Global Brand Image Report</b>  | \$3,495                                 | \$4,194                         |
| <b>Single Region Brand Image Report</b>   | \$2,495                                 | \$2,994                         |
| <b>Global Trade Media &amp; Shows Sections</b>  | \$3,495                                 | \$4,194                         |
| <b>Regional Trade Media &amp; Shows Sections</b>  | \$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.