

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

Media Storage World tm 2010

Publication Date: February 2010

General Overview:

Media Storage World tm 2010 is the fifth global survey of Media Storage systems in the world among broadcasters worldwide.

Sectors Covered:

1. **TV and Cable Stations,**
2. **Production and Post-production and**
3. **Institutional Facilities**

Modeled after MSW 2008 and MSW 2009. This tracking survey is the market's most comprehensive syndicated market research survey ever conducted regarding storage systems in the world. As before, we will publish a comprehensive survey report, showing all results in total (**for all sub-markets**) covering four major geographic regions.

The report covers the **U. S. A., EMEA (Europe, The Middle East, and Africa), Asia and the Americas**—closely following manufacturer sales territories—for activity among **broadcast TV and cable TV stations, production and post-production facilities markets**, shown with an estimated total responses to the trends and products questions of the study from which projections are made.

Market Sectors covered include:

- 1) **Broadcast**
- 2) **Cable**
- 3) **Production/Post-Production**
- 4) **Institutional Facilities (Government, Education, Religious, Medical & Corporate)**
Full market coverage, influences, and overall reporting detail.

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:

Key issues in the area of Media Storage include massive capacity demands, reaction to trends in technology such as 1080p and 3G, new storage media such as bubble memories and RAM chips, and cloud computing.

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.

Sample Frame and Lists Sourced:

The *Media Storage World™ 2010* 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

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	80	80	60	80	300
Cable	80	80	60	80	300
Production/Post-Production	80	80	60	80	300
Institutional Facilities	80	80	60	80	300
Total User Markets	320	320	240	320	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 & Japan guide	NAB/IBC guides SET/Caper
Cable	NAB/SMPTE O'Dwyers	IBC/Kemps Compass	BA/IBC/NAB Kemps, BIRTV, InterBEE	NAB/IBC Set/Caper

Report Table of Contents

FRONT MATTER:

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

GENERAL REPORT:

Type of business
Size of operation
Leading Applications such as: Video Archive, Video Library, VOD, AD Insertion, Streaming, SANs, News, etc.
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 RAID storage utilized
Maximum storage capacity now and desired
Use of RAIS storage 'daisy chain' approach
Use of SANs, NAS, Flash, RAM, clusters
Type of storage applications
Departments responsible for storage systems
Workflow patterns
MPEG orientation and IP issues
HD orientation and transition
Compression use
Computer platforms used
Disk drives versus tape drives
Year of first storage system purchased
Year of latest storage system purchase
Use of fiber channel, Ethernet, iSCSI, SCSI
Troublesome problems such as crashes
Firewalls
Summary of key features of systems
Number of drives now used
Number of drives planned
Automation software used
Other systems that storage systems integrate with
Other storage workflow issues
Future preferred drive technologies

MAGAZINES & TRADE SHOWS:

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

The report TOC plan is also available

PRODUCT REPORT(S) – Mass Storage Systems By vertical market

Number of Storage Systems owned (installed)
Number of display units by brand
Number of units by brand, model, type, by screen size and major application
Value in dollars
Number of units owned
Number of units purchased in 2009
Value in dollars/euro
Number of units planned for 2010

Value in dollars
Long term prospects for sales – 5 year forecast

PRODUCT REPORT(S) – Local Storage Systems By vertical market

Number of Storage Systems owned (installed)
Number of display units by brand
Number of units by brand, model, type, by screen size and major application
Value in dollars
Number of units owned
Number of units purchased in 2009
Value in dollars/euro
Number of units planned for 2010
Value in dollars
Long term prospects for sales – 5 year forecast

PRODUCT REPORT(S) – Shared Storage Systems By vertical market

Number of Storage Systems owned (installed)
Number of display units by brand
Number of units by brand, model, type, by screen size and major application
Value in dollars
Number of units owned
Number of units purchased in 2009
Value in dollars/euro
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) Reliability
D) After-sales-service

BRANDS TO BE INCLUDED -- But Not Limited To:

Ampex, Avid, Ciprico, EMC2, EVS, E-media, Epson, G-tech, Grass Valley Group (Thomson), GE, Harris, Hitachi, IBM, In-Phase, Iomega, Imation, LaCie, MassTech, Maxtor, Medea, Omneon, Panasonic, Philips/DVS, Samsung, SeaChange, SeaGate, Silicon Graphics (SGI), Sony, Sun Microsystems, Toshiba, Western Digital, etc.

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

- Local, Mass and Shared Storage System and Drive product categories and related storage aspects will be surveyed
- Unit and market value data
- Brand and leading model market shares
- Installed base (owned)
- Purchases in the past 12 months and value
- Plans to buy in the next 12 months and value
- 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
- Applications planned/used for VOD, streaming, MPEGs, SANs, RAID, etc.
- Trade magazine readership and trade show attendance and preference

3. BRAND IMAGE

- Brand image ratings for pre-fielded (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 telephone interviewing CATI methods where the responses got entered as they were gathered into the relational on-liner database. 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 Kemp's International. All of them were also merged together to form a phone list for domestic and international calls. In addition to the in-house CATI, D.I.S. Consulting Corporation also used CADi houses – calling centers -- in South America, Asia and Europe to gather the international responses.

INCENTIVES:

Survey respondents will receive a Media Storage World™ 2010 DIS-covery Trends report for their help, estimated to be worth \$400 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 tm 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.

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.

<i>Media Storage World tm 2010</i>	<i>* Pre-Publication Prices</i>	<i>Post-Publication Prices</i>
<i>The Fifth Global Market Survey</i>	<i>(-20% Discounted)</i>	<i>Orders After Publication</i>

Report Type*

**Purchases which occur approximately three months before publication,*

Offers a 20% discount off of post-publication price

<i>Pre-Publication*</i>	\$9,950 USD
<i>Post-Publication</i>	\$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 <u>FULL GLOBAL</u>	\$12,050 <u>FULL GLOBAL</u>
<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 DIS 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 electronic transfers

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 28-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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