

D.I.S. Consulting

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Publishing syndicated market research surveys in media technology markets since 1982

Medical Video World™ 2012

Publication Date: Spring 2012

General Overview:

Medical Video World™ 2012 is the first global survey of Medical Video Imaging systems in the world among medical professionals worldwide. The object of the study is to quantify the medical imaging equipment market for manufacturers of equipment, showing brand shares, units and values by segment.

The study focuses in on a dozen key product genres actively in use in medical imaging settings, worldwide including:

Product Sections Covered:

- 1) cameras & camcorders
- 2) flat panel displays
- 3) video/still printers
- 4) image switchers & routers
- 5) endoscopic camera systems
- 6) camera and display mounts or brackets
- 7) servers / digital video recorders
- 8) recording media for video and stills
- 9) video lighting
- 10) editing systems
- 12) graphics systems
- 13) storage systems
- 14) imaging dedicated computers and workstations

Five Regions:

Modeled after a number of other D.I.S. studies, this benchmarking survey is the market's most comprehensive syndicated market research survey ever conducted regarding medical imaging systems in the world. As before, we will publish a comprehensive survey report, showing all results in total (for all sub-markets) covering the five 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.

Overall Design:

The design of *Medical Video World tm 2012* is based on other benchmark survey, and 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 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 1,500 industry clients. D.I.S. Consulting Corporation also conducts numerous custom projects each year and publishes 28 global reports annually. The company is the strategic research partner of the NAB Show.

Major APPLICATIONS Covered in the report

Surgical & procedural observation
Documentary
Training & education
Patient instruction & orientation
Testing record making
Security & surveillance
Patient entertainment
Communication
Combined uses
Other

Key Issues:

Key issues in the area of Medical Imaging include massive capacity demands, reaction to trends in technology such as 1080p and 3G, new storage media such as bubble memories and RAM chips, higher resolution and 3D, lowering power usage, and cloud computing, among others.

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 *Medical Video World™ 2012* project used a fresh list of the various types of medical video and imaging facilities from culled from Hoovers (a division of D&B) as well as other industry sources. That culling targets medical imaging staffs, editors and engineers or the equivalent executives at global medical facilities.

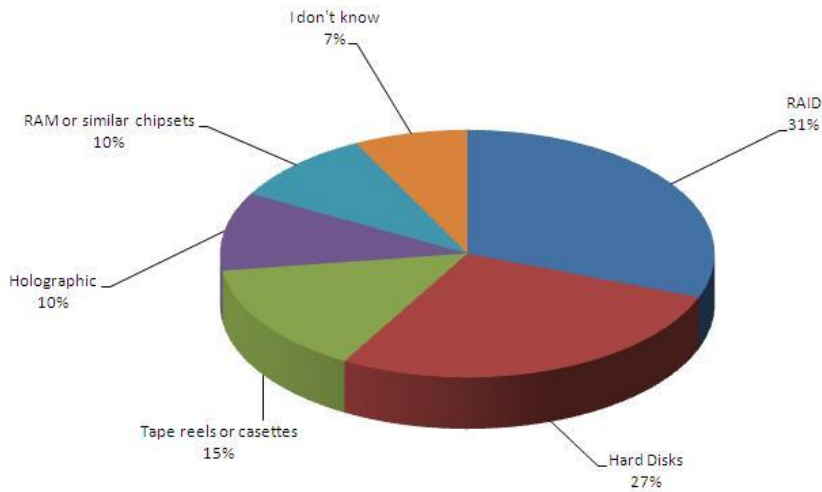
Avoiding Duplication:

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.

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What type of storage system do you think you will be using five (5) years from now?
ALL MARKETS



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The Market and Minimum Response Level Sought: 1,200 Respondents

This benchmarking survey covers five (5) regions:

1. USA 2. Europe 3. M-E/A 3. Asia 4. The Americas

Market Segment & Regional Universe	Responses Sought**				Global
Vertical Market	USA	EMEA	Asia	Americas	Global
<i>Doctors Offices</i>	80	80	60	80	300
<i>Teaching Hospitals</i>	80	80	60	80	300
<i>Testing Centers</i>	80	80	60	80	300
<i>Labs & Pharmaceutical</i>	80	80	60	80	300
Total User Markets	320	320	240	320	1,200

Lists by Region and Marketplace				
Markets	USA	Europe & M-E/A	ASIA	AMERICAS
Doctors Offices	Hoovers, NAB/SMPTE Broadcasting & Cable Ybk	Hoovers, NAB/IBC/Kemps World Guide to Film & TV	Hoovers, BA/IBC/NAB ABU/SMPTE World Guide	Hoovers, NAB/IBC World Guide Film & TV Set/Caper
Teaching Hospitals	Hoovers, NAB/SMPTE O'Dwyers	Hoovers, IBC/Kemps Compass	Hoovers, BA/IBC/NAB Kemps, etc.	Hoovers, NAB/IBC Set/Caper
Testing Centers	Hoovers, NAB/SMPTE Yellow Pages	Hoovers, NAB/IBC/Kemps Sonovision, etc.	Hoovers, BA/IBC/NAB Kemps/China & Japan guide	Hoovers, NAB/IBC guides SET/Caper
Labs/Pharmaceutical	Hoovers, NAB/SMPTE O'Dwyers	Hoovers, IBC/Kemps Compass	Hoovers, BA/IBC/NAB Kemps, BIRTV, InterBEE	Hoovers, NAB/IBC Set/Caper

Report Table of Contents

FRONT MATTER:

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

GENERAL REPORT:

Type of medical setting
Size of operation
Leading Applications such as: Archive, Video Library, Data Insertion, SANs, Surgical Observation, patient Information, etc.
Size of Budget
Budget Increasing, decreasing or remain same
Size of Revenues
Revenues increasing, decreasing or remain the same
Number of medical imaging employees
Number of staff having access to equipment
Extent of purchase authority
Type of facility

TECHNOLOGY TRENDS:

Type of equipment workflow utilized
Maximum storage capacity now and desired
Use of storage and approach
Use of equipment by key application
Departments responsible for imaging systems
MPEG orientation and IP/IT issues
HD orientation and transition
Adoption of 3D
Compression use
Computer platforms used
Disk drives versus tape drives
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
Other equipment frequently utilized
Major accessories
Future preferred drive technologies

PRODUCT REPORT(S) – The 14 Products

By vertical market
Number of Systems owned (installed)
Number of display units by brand
Number of units by brand, model, type, and by major application
Value in dollars
Number of units owned
Number of units purchased in 2011
Value in dollars
Number of units planned for 2012
Value in dollars
Long term prospects for sales – 5 year forecast

MAGAZINES & TRADE SHOWS:

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

BRAND IMAGE REPORT:

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:

Adobe, Ampex, Apple, Autodesk, Avid, Canon, Casio, Ciprico, Dell, EMC2, EVS, E-media, Epson, Facilis, Fuji/Fujinon, G-tech, Glyph, Grass Valley, GE, Harris, Hewlett Packard, Hitachi, IBM, JVC, Kodak, Leica, In-Phase, Info-Trend, Iomega, Imation, Isilon, LaCie, MassTech, Maxtor, Medea, Nikon, Omneon, Olympus, Panasonic, Pentax, Philips/DVS, Rourke Data, Samsung, SeaChange, SeaGate, Silicon Graphics, Sony, Sun Microsystems, Toshiba, Thomson, Toshiba, Western Digital, etc.

See on-line 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

- The 14 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 medical uses, 3D, HD, MPEGs, SANs, 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 the past 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. 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.

INCENTIVE:

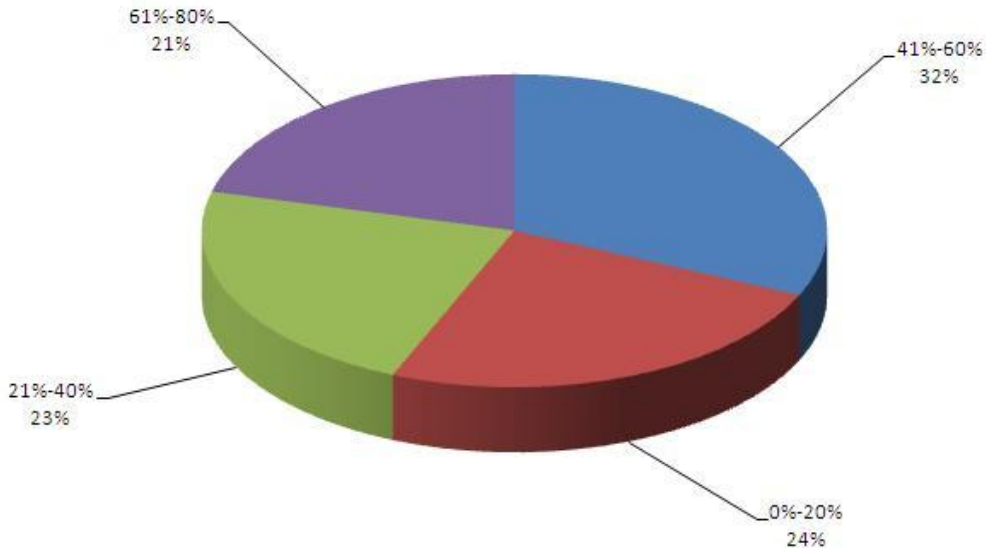
Survey respondents will receive a copy of the related *DIS Medical Video End-User Report* for their help, estimated to be worth \$450.00 USD to them.

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.

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**How much of your storage is within your server ?
BROADCAST**



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