

# **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*

## ***News Workflow World™ 2010***

**Publication Date: May 2010**

### **General Overview:**

*News Workflow World™ 2010 is the fourth tracking/global report of News Workflow Equipment. It is the most comprehensive syndicated market research surveys ever conducted regarding these products in the world. The global news market of end-users were surveyed, census style in the fourth edition of this global “bottoms-up” effort.*

### **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 late April of 2010, we will publish the 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 will be modularly available for purchase.

### **The Survey Covers 8 Genre of News Workflow Products, including:**

- **Captioning Systems**
- **News Automation Systems**
- **News Graphic Systems**
- **News Servers**
- **News Editing Systems**
- **Prompting Systems**
- **Newsroom Computers**
- **News Storage System**

### **Key Issues:**

Newsrooms have some unique approaches and workflows for video and audio processing that creates news programming, edits it and stores it. In such systemic approaches reside, not only in Newsroom Computing (and Text Processing), News Editing Systems/NLE, but also Servers, Storage Systems and Prompting and Captioning issues and many underlying software products. This study helps to clarify and illustrate the differences.

Among key issues to be clarified by NWW 2010 are: Workflow styles, market trends, storage capacity in bytes and hours/days, storage workflows, use and preference by type and brands of drives, perception and preferences for new drive technologies, types of ‘rich media’ stored and many other technology trends attendant to storage in broadcast and professional environments. (Servers are studied in our

Broadcast Servers World™ 2009, editing in Video Editing World™ 2009 and storage in Media Storage World™ 2009, respectively).

**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 News Workflow World™ 2010 project uses a list of stations and facilities culled from IBC, NAB, and Broadcast Asia. We target chief engineers or the equivalent senior technology executive at stations in the U. S., Europe, the Middle East, and Africa, Asia and the Americas.

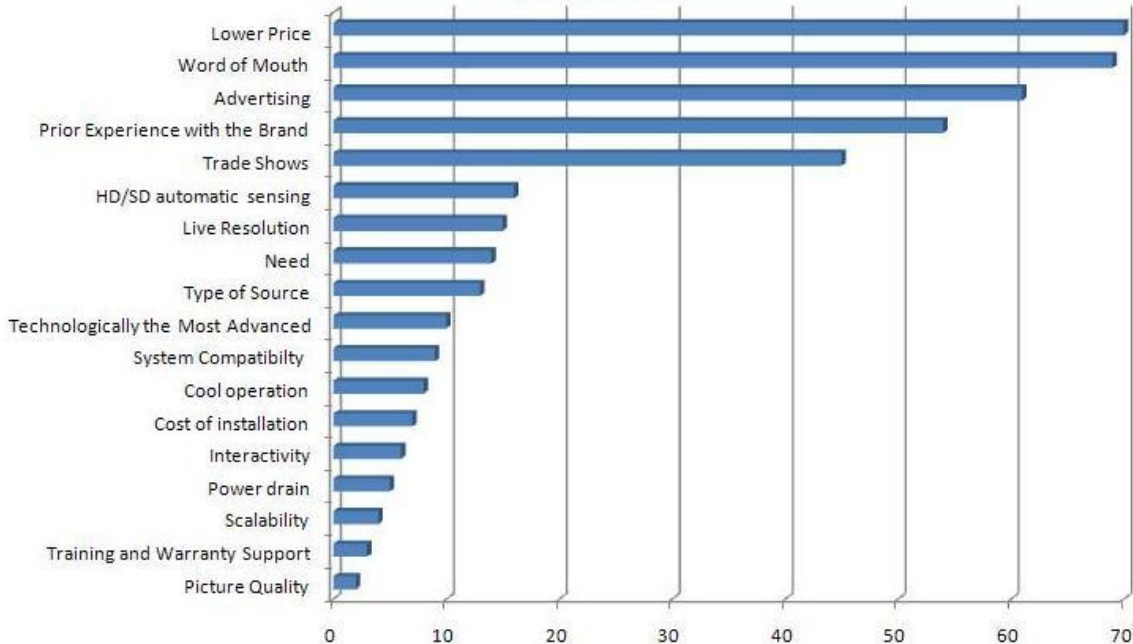
**Avoiding Duplication:**

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.

**NEWS WORKFLOW WORLD™ 2009**

**What most influences your decision to purchase  
News Workflow equipment?**

**ALL MARKETS**



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**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	
<b>Broadcast TV Stations</b>	150	130	100	70	450
<b>Radio Stations</b>	140	120	90	70	420
<b>Cable Stations</b>	100	90	80	60	330
<b>Total User Markets</b>	390	340	270	200	1,200

**Avoiding Duplication:**

<b>Lists by Region and Marketplace</b>				
Markets	USA	EMEA	ASIA	AMERICAS
Broadcast & TV Cable Stations	NAB/SMPTE Broadcasting & Cable Ybk RTNDA	NAB/IBC/Kemps World Guide to Film & TV RTS	BA/IBC/NAB ABU/SMPTE World Guide	NAB/IBC World Guide Film & TV Set/Caper
Radio Stations	NAB/SMPTE Yellow Pages	NAB/IBC/Kemps Sonovision	BA/IBC/NAB Kemps, etc.	NAB/IBC Set/Caper

## Report Table of Contents

### FRONT MATTER:

Cover & Spines  
Introduction & Methodology  
Staff Page  
Project Staff  
Executive Summary  
Industry 5-Year Forecasts  
Leader's Summary

### GENERAL REPORT:

*General:*  
Type of business  
Size of operation  
Leading Applications such as: News, Archive, Library, Sports, etc.,  
Size of Budget  
Budget Increasing, decreasing or remaining the same  
Size of Revenues  
Revenues increasing, decreasing or remaining the same  
Type of major news workflow 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 news workflow storage utilized, pecking order of component systems therein  
Categorized flows and who uses them most  
Use of RAIS storage 'daisy chain' approach  
Order in which major equipment is deployed  
Use of SANs, NAS, Flash, RAM and clusters  
Type of editing applications within news  
Departments responsible for major systems  
Workflow patterns flow-charted  
MPEG orientation and IP issues  
HD orientation and transition  
Compression use  
Computer platforms used  
Disk drives versus tape drives  
Year of first storage news system purchase  
Year of latest news system purchase  
Troublesome problems such as crashes, snags  
Firewalls and security issues  
Summary of key features of systems  
Number and types of drives or servers now used  
Number of drives or servers planned  
News software used  
Other systems that news systems integrate with  
Future storage technology preferences  
Other additional storage workflow issues

### MAGAZINES & TRADE SHOWS:

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

### 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) – For Storage, News Editing, News Graphics, Newsroom Computing, News Servers

#### 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 –

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

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

### BRANDS TO BE INCLUDED – But Not Limited To:

Apple, Autodesk/Discreet, Adobe, Avid, Asaca, Chyron, EMC, EVS, Grass Valley Group, Harris/Leitch/ASC, IBM, Ikegami, Omneon, Panasonic, Philips/DVS, Quantel Snell, SeaChange, Silicon Graphics Incorporated (SGI), Sony, Sun Microsystems, etc.

## **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**

- News Workflow product categories and related news processing technology and workflow aspects were 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 News, Sports, Weather, Maps, etc.
- 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 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:**

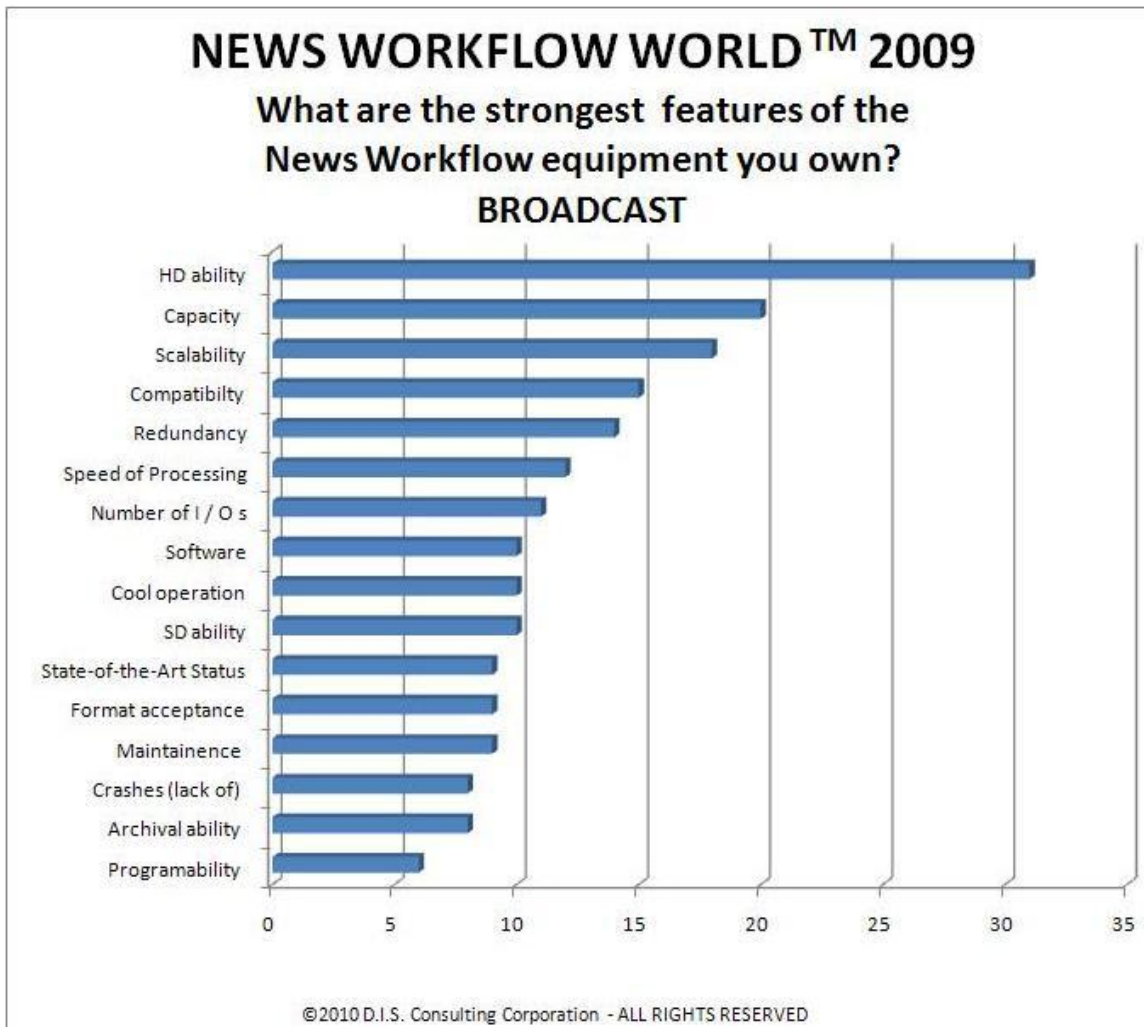
Survey respondents will receive a copy of the latest [NAB/D.I.S. Broadcasting, Audio & Video Global Industry Trends Report for](#) their help, estimated to be worth \$400 USD to them.

**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™ 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.

<i>News Workflow World™ 2010</i>	<i>* Pre-Publication Prices</i>	<i>Post-Publication Prices</i>
<i>The Sixth 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

<b>Regional Reports</b>		
<input type="checkbox"/> <b>1 region</b>	\$5,950	\$7,140
<input type="checkbox"/> <b>2 regions</b>	\$6,961	\$8,353
<input type="checkbox"/> <b>3 regions</b>	\$8,144	\$9,772
<input type="checkbox"/> <b>ALL 4 regions</b> <b>(Global FULL Sponsorship)</b>	<b>\$9,950</b> <b><u>FULL GLOBAL</u></b>	<b>\$12,050</b> <b><u>FULL GLOBAL</u></b>
<i>The following sections are FREE with the above packages OR available a la carte at the rates illustrated below</i>		
<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/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 advanced

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 News Workflow World™ 2010 is based on other benchmark survey, and 39 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.

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