

# 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*

## **Recording Media World™ 2010**

To be Published: August 2010

### **Survey Description**

#### **General Overview:**

Description of the Survey: Focused on Recording Media in use by broadcasters and audio-video professionals.

This is the FIRST global benchmarking REPORT in formats of broadcast and professional recording media, **Recording Media World tm 2010**, following on to our previous surveys such as the camcorders-only report, *Professional Camcorders World tm 2009*.

This benchmark global report is the result of the most comprehensive syndicated market research survey ever conducted regarding professional recording media and related systems, globally, among the various professional vertical segments that are covered.

#### **Markets Surveyed:**

- TV, Cable & Satellite Networks, Stations, Groups & Telcos
- Production & Post Production Companies , Mobile/OB
- Independent Film & Video Companies, Event Videographers & Freelancers
- Institutional Facilities
- Duplication/Replication Houses

In the fall of 2010, we will publish a 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.

#### **Formats:**

The covered ~ forecast ~ recording media formats will include (but not be limited to): VHS/S-VHS, Mini-DV, HDV, HD-CAM, HD-CAM/SR, LTO, Mini Disk, DAT, Digital Compact Cassette, DTS-CD, Super Audio CD, Slot Music, HD CD, Microcassette, Mini-cassette, Phillips Cassette, CD, MP3/MP4, IMX, DVCPRO/PRO50/PRO HD, DVCAM, BetaCam, Beta SP, Beta SX, Digital Beta, D5, 1/2" S-VHS/VHS, 3/4"/SP U-matic, D6, DLT, LTO, CD-R/RW, DVD GEN/Authoring, DV RAM, Blu-Ray Disk, Blu-Ray Disk 3D, P2 (Solid State Media), Prof Disk/XD Cam, Portable Hard Drives (a partial listing).

#### **Key Issues:**

Analog is all but gone, and early digital is giving way to new digital solutions. Tape has all but vanished and been replaced by either solid state or hard drive options.

Professionals using camcorders, PC/Mac desktops and laptops and other recording devices, are constantly searching for the recording media to complete their workflow.

Among key issues to be clarified by the study are: # of units of media owned by brand, bought in the last 12 months (2009), type of recording applications, price range at different price levels, ranking of size of

operation, type of recording media utilized (Formats), multi-format 'agnostic' systems, maximum recording capacity, use of media storage and capacity, WIFI, compression, media recycling, shifting workflow patterns and trends in post, troublesome problems, and a summary of key features of alternative solutions.

## **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. The Market, Universe Size and Response Level Sought: 1,200 respondents.

## **This tracking survey covers four regions:**

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

These regions closely follow manufacturer's sales territories for activity among TV & Cable Networks & Stations, Production Companies, Mobile/OB, Independent Film & Video Companies, Event Video, Institutional Facilities, and Duplication / Replication Houses shown with an estimated total universe size in terms of number of sites and responses as well as to the trends and product questions of the study from which projections will be made

## **Sample Frame and Lists Sourced:**

The *Test and Measurement World™ 2010* project uses a list of stations and facilities culled from IBC, the NAB Show, 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.

## **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 TV & 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

Market Segment & Regional Universe	<i>Responses Sought**</i>				
Vertical Market	United States	EMEA	Asia	Americas	
<b>Broadcast/Cable/Sat</b>	100	100	80	60	340
<b>Production/Post/Mobile/OB</b>	90	90	75	40	295
<b>Institutional Facilities</b>	70	80	55	40	245
<b>Independent Film/Freelance</b>	70	40	40	40	190
<b>Duplication/Replication</b>	60	30	20	30	140
<b>Total User Markets</b>	390	340	270	200	1,200

Lists by Region and Marketplace				
Markets	USA	EMEA	ASIA	AMERICAS
Broadcast/Cable	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
Independent Film/ Freelancers	NAB/SMPTE O'Dwyers	IBC/Kemps Compass	BA/IBC/NAB Kemps, BIRTV,	NAB/IBC Set/Caper
Dupe/Replication	NAB/SMPTE Yellow Pages	NAB/IBC Kemps, Sonovision, ETC	BA/IBC/NAB/K emps,China Broadcasting Dir.	NAB/IBC Set/Caper

Additional in-country guides were also utilized, as needed, to augment the above list sources. These included guides such as SONOVISION's Qui Fait Quo (France's renowned production facility guide) and other comparable guidebooks.

The same is true of professional society lists that will be tapped in certain countries to at least check against other lists. The above lists were sometimes altered as we further developed the actual field phase and chose to balance the sampling.

We are always open, as well, to suggestions from our clients regarding list sources, universe sizes or any aspect of the research design in future fielding.

<p><b>FRONT MATTER</b>  Cover &amp; Spines  Introduction &amp; Methodology  Preface &amp; Purpose  Project Staff  Executive Summary  Industry Forecasts with 5 year span</p> <p><b>GENERAL REPORT</b>  <i>General</i>  Type of operation  Leading applications as such: Program Origination, News, Production, Sports, Documentary, Archive, Web, etc.  Size of budget  Budget increasing, decreasing or remaining (2009/2010)  Size of revenues  Revenues increasing, decreasing, remaining (2009/2010)  Type of media applications  Price range – different price levels  Number of staff having access to media  Month most often purchasing  Extent of purchase authority  Source of purchases  Purchase influences  Comparable ranking of stations  Type of station or facility</p> <p><b>TECHNOLOGY TRENDS</b>  Type of recording media utilized  Maximum recording capacity  Use of media storage and capacity  Departments responsible for media access  Workflow patterns – shifting trends in post MPEG orientation and IP/IT issues  HD/HDV/3D orientation and transition  Compression use  Computer platforms used and disk versus tape  Year of first purchase by type  Year of latest purchase by type  Use of Fiber Channel, FireWire, Ethernet, WIFI or SCSI  Troublesome problems  Summary of key features of media  Number of media units now owned  Number of media format units bought and planned  Other leading accessories, in media, etc.</p>	<p><b>MAGAZINES AND TRADE SHOWS</b>  Trade magazines read and preferred  Single most valued  Trade shows attended and planned  Single most valued</p> <p><b>BRAND IMAGE REPORT – BY GENRE</b>  General criteria for Brand Image Rankings  Image rankings of major brands of media including: Awareness and For: a) Price, b) Quality, c) Reliability and d) After-sales-service</p> <p><b>PRODUCT DATA - BY FORMAT</b>  Value in dollars and units Owned/Installed  Value in dollars and units Bought in 2009  Value in dollars and units planned for 2010  Longer term prospects for sales – 5-year forecasts, by format and by application, segment and region</p> <p><b>With Brands to include (but not be limited to):</b>  ACP-EP Memory, Agfa, Aleratec, Ampex, Axiom Memory Solutions, BASF, Canon, Centon Electronics, CMS Products, Corsair Memory, Crucial Technology, Datalogic, Eastman Kodak, Easystore, Edgetech, Exabyte, Eye-fi, Eye-Fi, Falcon Pro Media, Foma, Fujifilm, HHB, Hoodman, H-P, IBM, IDE, Ilford, Imation, Intel, Iomega, Ironkey, JVC, Kanguru Solutions, Kingston Technology Corp, Lexar, Line 1, Magnavox, Maxell, Memorex, Microboards, Mitsui, Moser Baer, Nikon, Nokia, Olympus, Optodisc, Oriental, Panasonic, Pentax, Philips, Pioneer, Primera, Prodisc, Qmemory, Quantegy, Quantum, Quantum, Ridata, Rimage, Ritek, RMGI International, Samsung, SanDisk, Sanyo, SATA, Sony, Spin-X, Sun Micro, Taiyo Yuden, Tandberg, Tayloreel, TDK, Toshiba, Transcend, Transcend, Verbatim</p> <p>(locate further brands in the final questionnaire)</p>
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## 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

- Media format(s) product category and related aspects to be surveyed
- Unit and market value data in each
- Brand and leading format 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
- Media budgets and buying habits
- Demographics
- New Technologies, applications and trends, such as IP, TV, HD, MPEG, WIFI, 3D
- 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

## About Multi-Client Studies

### **Overall Design:**

The design of *Recording Media World™ 2010* 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 DIS 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.

### **Experienced Staff:**

D.I.S. Consulting Corporation maintains six 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 more than 25 reports annually.

## Method Used

### **The Use of E-mail blasts:**

Most data is collected using on-line collection methods at on-line websites. D.I.S. uses the auspices of the NAB Show's opted in e-mails as well as other sources to reach out to solicit responses from professional end-users.

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 *copy of the joint D. I. S. /Nab Show Global trends Report™ 2010* edition. for their help, which is worth \$450 USD to them (it sells for that price at retail).

### **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 of all the data.

## List Sources

### Sample Frame and Lists Sourced:

The *Recording Media 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.

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## Pricing & Terms

Recording Media World™ 2010

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>Recording Media World™ 2010</b>	<b>Pre-Publication Prices</b>	<b>Post-Publication Prices</b>
<b>Report Type*</b>	<b>Orders <u>By</u> closing May 31, 2010 ( 20% Discount )</b>	<b>Orders <u>After</u> Publication September, 2010</b>
• <b>1 region</b>	\$5,950	\$7,140
• <b>2 regions</b>	\$6,961	\$8,353
• <b>3 regions</b>	\$8,144	\$9,772
• <b>ALL 4 regions – all product formats (Global FULL Sponsorship)</b>	\$9,950 <u>Full GLOBAL</u>	\$12,050 <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.