

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

Video Switchers World™ 2012

Publication Date: November 2012

General Overview: *Video Switchers World™ 2012* is the seventh edition and is an extremely comprehensive syndicated market research survey ever conducted regarding these products, in the world. The global market for production switchers, routing systems and master control switchers, will be surveyed, census style, in this global “bottoms-up” research effort to be published in late November. Note that, starting with this report, production switchers will be organized by the number of MEs and routing systems by the number of I/Os.

Product Categories

- Production Switchers / Vision Mixers
- Master Control Switchers
- Routing Switchers

Market Sectors covered Include:

- TV, Cable & Satellite Stations
- Production, Post-Production, Freelance/Independent/Event Production
- Mobile/OB
- Institutional (Church, Government/Military, Corporate, Medical and Educational).
- Rental houses

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 video switching products owned), actual purchases in 2012 and planned 2013 purchases, and a 5-year forecast of all sales. In late November, we will publish a comprehensive report, showing all results by type, sub-market and world regions surveyed. End-user data will be collected and completed online. The data will be sorted and warehoused in an online data base and analyzed.

Key Issues:

- 3 Gig / 1080p infrastructure
- Number of MEs
- I/Os and cross-points
- Preferred features in a new system
- Proliferation / penetration of HD
- 3D processing
- Portable and smaller scale systems
- Automatic and programmable systems
- Branding
- Utilization of fiber
- Arrival and expansion of use of Chinese goods and impact on prices
- New technology

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 *Video Switchers World™ 2012* 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.

- 1.) USA 2.) Europe 3.) M-E/AFRICA. 4.) Asia 5.) The Americas

| Vertical Market | USA | Europe & M-E/Africa | Asia | Americas | Global |
|----------------------------------|------------|---------------------|------------|------------|--------------|
| <i>Broadcast/Cable Stations</i> | 100 | 60/35 | 85 | 60 | 340 |
| <i>Production/Post/Freelance</i> | 90 | 50/40 | 70 | 50 | 290 |
| <i>Mobile/OB</i> | 80 | 40/25 | 55 | 40 | 240 |
| <i>Institutional</i> | 60 | 30/20 | 30 | 30 | 170 |
| <i>Equipment Rental Houses</i> | 60 | 30/20 | 30 | 20 | 160 |
| Total User Markets | 390 | 340 | 270 | 200 | 1,200 |

| Lists by Region and Marketplace | | | | |
|--|---|---|--|--|
| Markets | USA | Europe & M-E/A | 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 |
| Production/Post/ Freelance | NAB/SMPTE Yellow Pages | NAB/IBC/Kemps Sonovision | BA/IBC/NAB Kemps, etc. | NAB/IBC Set/Caper |
| Mobile/OB | NAB/SMPTE Yellow Pages | NAB/IBC/Kemps Sonovision | BA/IBC/NAB Kemps | NAB/IBC, Caper/Set |
| Institutional Facilities (Government, Medical, Corporate, Education, Religious) | NAB/SMPTE Yellow Pages | NAB/IBC/Kemps Sonovision | BA/IBC/NAB Kemps etc. | NAB/IBC Set/Caper |
| Equipment Rental | 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:

Type of business
Size of operation
Leading Applications such as: News, Archive, Documentary, Sports, Movies, TV Programs, etc.,
Size of Budget
Budget Increasing, decreasing or remaining the same
Size of Revenues
Revenues increasing, decreasing or remaining the same
Type of major switcher workflow applications
Number of employees
Number of staff having access to gear
Extent of purchase authority
Comparable ranking
Type of station or facility

TECHNOLOGY TRENDS:

Categorized flows and who uses them most
Preferred features sought in a new system
Order in which major equipment is deployed
Type of switching applications within chain
Departments responsible for major systems
Workflow reflected
Small versus large-scale switcher uses
3 Gig / 1080p
Numbers of I/O and/pr ME cross points
MPEG orientation and IP/IT issues
HD versus SD and 3D
Higher Resolution such as 4K and 8K
Compression use
Computer platforms used
Year of first system purchase
Year of latest system purchase
Troublesome problems
Firewalls and security issues
Summary of key features of switching systems
Number and types channels
Switcher software used if applicable
Other systems that switchers integrate with
Future technology preferences
Other additional workflow issues

MAGAZINES & TRADE SHOWS:

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

PRODUCT REPORT(S) –Systems By vertical market – by Genre – for each of the categories (production by ME, master by Channel and routing by I/Os)

Number of systems owned (installed) – by type
Number of units by brand
Number of units by brand, type, and major application
Value in dollars
Number of units owned
Number of units purchased in 2012
Value in dollars
Number of units planned for 2013
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 switchers
including:
A) Awareness
B) Price
C) Quality
D) Reliability
E) After-sales-service

Switcher brands to be included- But Not Limited to:

Accom / Abekas, ADC, Adcom, Adrienne, Ampex, BAL,
Broadcast Pix, Broadcast Technology, Black Magic,
Broadcast Video Systems, Brick House, BTS/Bosch,
Comprehensive Video, Datatek, Datavideo, Dynatek,
Digital Video Systems (DVS), Echolab, Ediol, Evertz,
Extron, Focus Enhancements, For-A, Grass Valley, Gefen,
Hedco, Hitachi, Horita, Hotronic, Ikegami, Inline, Keying
Image Video, JVC, Kramer, Knox, Laird, Leitch,
Leightronix, Link, Miranda, Multidyne, Network/Nevion,
Nvision, Oxtel, Panasonic, PESA, Philips/DVS, Pinnacle
Systems, Pro-Bel, Ross Video, Quantel, Quartz, Sierra,
Sigma, Snell, Sony, Utah Scientific, VBrick, VGV and
Videotek. And, others.

See on-line questionnaire for final brand lists.

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. SWITCHER PRODUCT REPORTS

- Video switcher categories ~ production (by ME), master and routing (by I/Os) ~ and related production/post switching technology and workflow aspects will be surveyed
- Unit and market value data
- Brand and leading type market shares
- Installed base (owned)
- Purchases in the past 12 months (2012) and value
- Plans to buy in the next 12 months (2013) 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
- Key breakouts such as MEs, buses or cross-points
- Revenues
- Demographics
- New Technologies, applications and trends, such as IP, Cloud, 3 Gig / 1080p, 3D, etc.
- Higher resolution such as 4K and 8K
- Applications planned/used for News, Movies, Sports, TV Programs, Documentaries, Weather,
- Trade magazine readership and trade show attendance and preference

3. BRAND IMAGE

- Brand image ratings for pre-fielded, front-end sponsors only (all leading switching 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.

We invite professionals to the website and collect their individual product data ~ on-line ~ using a method where the responses are entered as they are gathered into the relational on-line database. Up to date e-mailing lists are 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 are also merged together to form an e-mail and phone lists for domestic and international solicitations

INCENTIVES:

Survey respondents will receive a copy of the latest *DIS 2012 Switcher End-User Trends Report* for their help, estimated to be worth \$450 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>Video Switchers World™ 2012</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 |

| Regional Reports | | |
|---|--------------------------------|---------------------------------|
| <input type="checkbox"/> 1 region or product | \$5,950 | \$7,140 |
| <input type="checkbox"/> 2 regions or product | \$6,961 | \$8,353 |
| <input type="checkbox"/> 3 regions or product | \$8,144 | \$9,772 |
| <input type="checkbox"/> ALL 5 regions/products (Global FULL Sponsorship) | \$9,950 FULL GLOBAL | \$12,050 FULL GLOBAL |
| <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 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 *Video Switchers World™ 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.

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