

DIS Consulting Corporation

Publishing syndicated market research surveys in media technology markets since 1982

In Collaboration with Kane Consulting, Inc.

News Workflow World™ 2007

NWW 2007 Will Be Published in February 2008
20% Front-End Discount Available Thru November, 2007

Survey Description

General Overview:

News Workflow World™ 2007 is the first global survey of broadcast & audio-video related news systems and associated technology ever conducted and, slated to become the most comprehensive syndicated market research survey ever conducted regarding these products. Sectors covered include: Broadcast TV stations, Cable stations and Radio stations, in terms of product and market coverage, influences and overall reporting detail. In February 2008, 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. Those reports will be modularly available for purchase.

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 news editing systems and NLEs, but also servers, storage systems and text processing, 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™ 2007* are: news flow styles, news flow market trends, news storage capacity in bytes and hours/days, news handling and storage workflows, use and preference by type and brands of drives, perception and preferences for new drive technologies, types of 'rich media' handled and many other technology trends attendant to workflow of news in broadcast and professional environments. (Servers are studied in our *Broadcast Servers World™* global reports each year, editing in *Video editing World™ 2007* and storage in *Media Storage World™ 2007*, respectively).

Deliverables:

The sponsors receive a CD-ROM copy of the survey results (containing PDF sections) for those regions they have sponsored and/or for the global totals if they have sponsored the survey on a global level. Sponsors also receive a hard copy set of the data. 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 (600 responses sought):

This benchmark survey covered 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 facilities markets, shown with an estimated total universe size in terms of number of sites and responses to the trends and products questions of the study from which projections will be made.

Market Segment & Regional Universes

Vertical Markets	States United	Europe ME/Africa	Americas	Asia	total global 2007 Survey Response sought*
Broadcast TV stations	75	65	35	50	225
Cable TV stations	50	45	30	40	165
Radio stations	70	60	35	45	210
Total User Markets	195	170	100	135	600

DIS Multi Client Studies

Overall Design:

The design of *News Workflow World™ 2007* is based on other benchmark surveys, and 37 years of experience that Douglas I. Sheer, DIS Consulting Corporation's CEO, has had in a variety of marketing, publishing, advertising, consulting and research positions and, on the 25-year record his firm DIS 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 1,100 industry clients.

As for as news workflow experience, in 1981, Sheer edited and published the industry's first guide to Electronic News Gathering, as director of special projects for *BM/E* and *World Broadcast News* magazines. C. Robert Paulson was principal author and Robert Rivlin a major contributor. Past news-oriented consulting clients have included Dynatech Newstar and BASYS, among others. This project is also being worked on by Kane Consulting, Inc. of Paris, France, who has extensive qualitative experience in the genre.

Other recent multi-client studies include: *Video Editing World™ 2007*, *Video Graphics World™ 2007*, and *Video Switchers World™ 2007*. Another study, *Professional Camcorders World™ 2006* was published earlier this year. DIS Consulting Corporation also conducts numerous custom projects each year and publishes 18 global reports annually.

Staff Experience:

DIS Consulting Corporation maintains five 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 Collaboration with Kane Consulting:

DIS, here, collaborates with Paris-based Kane Consulting, Inc. led by Charles Bebert, managing director adds its extensive qualitative research and consulting skills to the project. His colleague, Adrian Scott, also of Bakewell House Consultancy has also played a role in the design and implementation of the prospectus, survey questionnaire and will later provide analytical summation of the report findings.

Method Used

Our Mixed-method:

The syndicated multi-client research methodology used by DIS Consulting Corporation features a combination of a classical direct mail self-completion interviewing technique, where respondents fill out a pre-coded booklet-questionnaire, with a C. A. T. I. Telephone interviewing technique, as well as data collection via an on-line website.

The installed base is taken, census style, and 12 months past purchases and plans to purchase 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 *News Workflow World™ 2007* end-user report for their help, which we estimate to be worth at least \$650 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.

List Sources & Sample Design

Sample Frame and Lists Sourced:

The *News Workflow World™ 2007* project uses a 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. We target chief engineers or the equivalent senior technology executive at TV and cable station in the U.S. Production and Post-Production names are 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 also utilized. Institutional facilities are sourced in the O'Dwyer's Guide and other sources. The RTNDA list of news directors was also sourced to improve NEWS/ENG use coverage.

Lists by Region and Marketplace

<u>Markets</u>	<u>USA</u>	<u>Europe/ME/Africa</u>	<u>Asia</u>	<u>Americas</u>
<i>Broadcast/Cable</i>	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
<i>Radio</i>	NAB/SMPTE Yellow Pages RTNDA	NAB/IBC/Kemps Sonovision, etc.	BA/IBC/NAB Kemps	NAB/IBC shows SET/Caper

Report Table of Contents:

<p>FRONT MATTER Cover & Spines Introduction & Methodology Preface & Purpose Project Staff Executive Summary Industry Forecasts Leader's Summary</p> <p>GENERAL REPORT General Type of operation Size of operation Leading applications: News, Archive, Library, etc. Size of budget Budget increasing, decreasing or remaining the same (2007/2008) Size of revenues Revenues increasing, decreasing or remaining the same (2007/2008) Number of employees Type of major news workflow applications Number of staff having access to news systems Extent of purchase authority ADI or comparable ranking Type of station or facility</p> <p>Technology Trends Type of news workflow storage utilized, pecking order of component systems therein Workflow patterns flow-charted 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 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 Use of Fiber Channel, Ethernet, iSCSI or SCSI Troublesome problems such as crashes, snags Firewalls and security issues</p>	<p>Summary of key features of systems Number and types of news components now used Number of news components planned News software used Other systems that news systems integrate with Future technology preferences Other additional workflow issues</p> <p>Magazines and Trade Shows Trade magazines read and preferred Single most valued Trade shows attended and planned Single most valued Websites visited</p> <p>PRODUCT REPORT(s) – Storage Systems By vertical market and region Number of Storage Systems owned (installed) Number of Storage Systems by brand Number of units by brand, model, type or series Value in dollars Number of units purchased in 2007 Value in dollars Number of units planned for 2008 Value in dollars Longer term prospects for sales – 5-year forecasts</p> <p>BRAND IMAGE REPORT – News Systems General criteria for Brand Image Rankings Image rankings of major brands of <u>News Systems</u> including:</p> <p>FOR: a) price, b) quality, c) reliability and d) after-sales-service</p> <p>Brands to be included (but not be limited to): Apple, Autodesk/Discreet, Avid, Ampex, Asaca, EMC2, EVS, Grass Valley Group (Thomson), Harris/ Leitch/ASC, IBM, Ikegami, Omneon, Odetics, Quantel, Panasonic, Philips/DVS, SeaChange, Silicon Graphics Incorporated (SGI), Sony, Sun Microsystems, etc. (See the questionnaire for the exact list)</p> <p>This outline is preliminary and will be amended later this summer.</p> <p>(See the questionnaire in Brand Image and in product genre sections to locate brands by name).</p>
--	---

Format of Reporting Data

Summary tables, color Excel charts, graphs and a written summary sections show both quantitative and qualitative 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 information for all questions asked are also provided. The report is also on a computer disc. There are three types of reports available:

1. Product Report

- **News Workflow product categories and related news processing technology and workflow 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 (2007)**
- **Plans to buy in the next 12 months and value (2008)**
- **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**
- **Equipment budgets and buying habits**
- **Demographics**
- **New Technologies, applications and trends, such as IP, etc**
- **Applications planned/used for News, Sports, Weather, Maps, 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 by each factor, as well as by overall Composite Brand Image. All charts also show the Industry Average**

Pricing & Terms

Pricing is based on the number of regions required. Each regional purchase includes the General Report sections. The Brand Image Reports are also included with a purchase of one or more regional reports. Pre-Publication Sponsor prices are lower than post publication prices. Consult us for Package and Custom Cross Tabulation Pricing OR for single-product prices such as for Drives only or Storage Systems only.

News Workflow World™ 2007 The first Global Market Survey	Pre- Publication Prices	Post- Publication Prices
Report Type*	Orders Before November 2007 (-20% Discounted)	Orders After Publication after February 2008
Regional Reports		
• 1 region	\$5,950	\$7,140
• 2 regions	\$6,961	\$8,353
• 3 regions	\$8,144	\$9,772
• ALL 4 regions (Global FULL Sponsorship – Systems & related issues)	\$9,950 <u>FULL</u> <u>GLOBAL</u>	\$12,050 <u>FULL</u> <u>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. 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.

DIS Consulting Corporation FAXFORM *News Workflow World™ 2007*

TO: Douglas I. Sheer	DIS Consulting Corporation	FAX: 212-213-6876
FROM:	COMPANY:	TITLE:
_____	_____	_____
TEL:	FAX:	EMAIL:
_____	_____	_____
_____	_____	_____

I want to order *News Workflow World™ 2007* -- with the selection of the following Regions or Sections:

USA Report	<input type="checkbox"/>
EMEA Report	<input type="checkbox"/>
Americas Report	<input type="checkbox"/>
Asia Report	<input type="checkbox"/>
Full GLOBAL Report	<input type="checkbox"/>
Brand Image Only USA	<input type="checkbox"/>
Brand Image Only EMEA	<input type="checkbox"/>
Brand Image Only Americas	<input type="checkbox"/>
Brand Image Only Asia	<input type="checkbox"/>
Full Global Brand Image	<input type="checkbox"/>
Trade Magazines & Shows USA	<input type="checkbox"/>
Trade Magazines & Shows EMEA	<input type="checkbox"/>
Trade Magazines & Shows Americas	<input type="checkbox"/>
Trade Magazines & Shows Asia	<input type="checkbox"/>
Full Global Trade Magazines & Shows	<input type="checkbox"/>

⇒ Invoice me and ship the above	<input type="checkbox"/>	Signature: _____
⇒ Contact me	<input type="checkbox"/>	Date: _____
⇒ Send me more information	<input type="checkbox"/>	Specify: _____

Fax this completed form to (212) 213-6876

Thank you!