

# DIS Consulting Corporation

Publishing syndicated market research surveys in media technology markets since 1982

## **Media Storage World™ 2008**

*MSW 2007 was published in March 2008  
-20% Discounted Prices No Longer Available*

### **Survey Description**

#### **General Overview:**

*Media Storage World™ 2008* is the second global survey of media storage systems ever conducted, with coverage of broadcast & audio-video related media storage systems and associated drives, and slated to become the most comprehensive syndicated market research survey ever conducted regarding these products. It was based on the bench mark survey conducted in 2007. Sectors covered include: broadcast TV stations, cable stations, production and post-production and institutional facilities in terms of product and market coverage, influences and overall reporting detail. In March 2008, we published 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:**

Professionals often use servers for limited storage, or individualized smaller storage arrays where servers or mass storage systems don't seem appropriate, but beyond their capacity there is a need for mass storage on the high-end and this study helps to clarify and illustrate the differences. Among key issues to be clarified by *MSW 2008* are: storage styles, market trends, storage capacity in bytes and hours/days, storage workflows, use and preference for 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™* global reports each year).

#### **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 is 600:**

This global survey covers 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 the trends and products questions of the study from which projections are made.

### **Market Segment & Regional Universes**

Vertical Markets	States United	Europe ME/Africa	Americas	Asia	total global 2005 Survey Response sought*
Broadcast TV Cable & Sat	60	50	20	30	160
Institutional facilities	30	20	10	20	80
Production & Post Facilities	60	50	20	30	160
<b>Total User Markets</b>	<b>150</b>	<b>120</b>	<b>50</b>	<b>80</b>	<b>400</b>

## DIS Multi-client Studies

### Overall Design:

The design of *Media Storage World™ 2008* is based on other benchmark survey, 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.

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.

## 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 will receive a *Media Storage World™ 2008* 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

## List Sources & Sample Design

### Sample Frame and Lists Sourced:

The *Media Storage World™ 2008* 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 stations in the U.S. Production and Post-Production names 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 also used. Institutional names are drawn from O'Dwyers Guide and other sources. The RTNDA list of news directors is also sourced to improve NEWS/ENG use coverage.

### 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.

## 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/Sat</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>Institutional (Gov't, Medical, Educational, Corporate and Religious</i>	NAB/SMPTE O'Dwyers	IBC/Kemps Compass	BA/IBC/NAB Kemps, etc.	NAB/IBC Set/Caper
<i>Production/Post-Prod</i>	NAB/SMPTE Yellow Pages	NAB/IBC/Kemps Sonovision, etc.	BA/IBC/NAB Kemps/China	NAB/IBC shows SET/Caper

## Report Table of Contents

<p><b>FRONT MATTER</b>  Cover &amp; Spines  Introduction &amp; Methodology  Preface &amp; Purpose  Staff Roles &amp; Biographies  Executive Summary  Industry Forecasts  <b>GENERAL REPORT</b>  <b>General</b>  Type of operation  Size of operation  Leading applications as such: Video Archive, Video Library, VOD, Ad Insertion, Streaming, SANs, News  Size of budget  Budget increasing, decreasing or remaining the same (2006/2007)  Size of revenues  Revenues increasing, decreasing or remaining the same (2006/2007)  Number of employees  Type of storage applications  Number of staff having access to systems  Extent of purchase authority  ADI or comparable ranking  Type of station or facility  <b>Technology Trends</b>  Type of RAID storage utilized  Maximum storage capacity now and desired  Use of RAIS storage 'daisy chain' approach  Use of SANs, NAS, Flash, RAM and clusters  Type of storage applications  Departments responsible for storage systems  Workflow patterns  MPEG orientation and IP issues  HD orientation and transition  Compression use  Computer platforms used  Disk drives versus tape drives  Year of first storage system purchase  Year of latest storage system purchase  Use of Fiber Channel, Ethernet, iSCSI or 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  Future preferred drive technologies</p>	<p><b>Magazines and Trade Shows</b>  Trade magazines read and preferred  Single most valued  Trade shows attended and planned  Single most valued  Websites visited  <b>PRODUCT REPORT(s) – Mass Storage Systems</b>  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 owned  Number of units purchased in 2007  Value in dollars and/or euro  Number of units planned for 2008  Value in dollars  Longer term prospects for sales – 5-year forecasts  <b>PRODUCT REPORT(s) – Local Storage Drives</b>  By vertical market and region  Number of Storage Drives owned (installed)  Number of Storage Drives by brand  Number of units by brand, model, type or series  Value in dollars  Number of units purchased in 2007  Value in dollars and/or euro  Number of units planned for 2008  Value in dollars  Longer term prospects for sales – 5-year forecasts  <b>BRAND IMAGE REPORT – By Genres</b>  General criteria for Brand Image Rankings  Image rankings of major brands of servers including:  For: a) Price, b) Quality, c) Reliability and d) After-sales-service  <b>Storage brands</b> to be included (but not be limited to): Avid, Ampex, Asaca, EMC2, EVS, Grass Valley Group (Thomson), Harris/ Leitch/ASC, IBM, Omneon, Odetics, Quantel, Panasonic, Philips/DVS, SeaChange, Silicon Graphics Incorporated (SGI), Sony, Sun Microsystems, etc.  <b>Storage drive brands</b> to be included (but not be limited to): Ampex, Avid, Ciprico, EMC2, EVS, E-media, Epson, G-tech, Grass Valley Group (Thomson), GE, Harris, Hitachi, IBM, In-Phase, Iomega, Imation, LaCie, MassTech, Maxtor, Medea, Omneon, Panasonic, Philips/DVS, Samsung, SeaChange, SeaGate, Silicon Graphics (SGI), Sony, Sun Microsystems, Toshiba, Western Digital, etc.</p>
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## 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

- **Storage System and Drive 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 (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 VOD, streaming, MPEG, SANs, RAID, 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 product category purchase includes the General Reports. The Brand Image Reports are included with a purchase of three or more regions. Pre-Publication Sponsor prices are lower than post publication prices (March 2008 and beyond). Consult us for Package and Custom Cross Tabulation Pricing.

<b>Media Storage World™ 2008 The second Global Market Survey</b>	<b>Pre- Publication Prices</b>	<b>Post- Publication Prices</b>
<b>Report Type*</b>	<b>Orders Before Fielding September 31<sup>st</sup>, 2007 ( -20% Discounted )</b>	<b>Orders After Publication after March, 2008</b>
<b>Regional Reports</b>		
• 1 region / both products	\$5,950	\$7,140
• 2 regions / both products	\$6,961	\$8,353
• 3 regions / both products	\$8,144	\$9,772
• ALL 4 regions (Global FULL Sponsorship – Both products ... Systems & Drives)	\$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>		
<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

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 Media Storage World™ 2008

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

**I want to order *Media Storage World* <sup>TM</sup>2008 -- with the selection of the following Regions or Sections:**

USA Report ( <i>Media Storage USA</i> <sup>TM</sup> 2008)	[ ]
Europe/ME/A Report ( <i>Media Storage EMEA</i> <sup>TM</sup> 2008)	[ ]
Americas Report ( <i>Media Storage Americas</i> <sup>TM</sup> 2008)	[ ]
Asia Report ( <i>Media Storage Asia</i> <sup>TM</sup> 2008)	[ ]
Full GLOBAL Report ( <i>Media Storage World</i> <sup>TM</sup> 2008)	[ ]
Brand Image Only USA	[ ]
Brand Image Only EMEA	[ ]
Brand Image Only Americas	[ ]
Brand Image Only Asia	[ ]
Full Global Brand Image	[ ]
Trade Magazines & Shows USA	[ ]
Trade Magazines & Shows EMEA	[ ]
Trade Magazines & Shows Americas	[ ]
Trade Magazines & Shows Asia	[ ]
Full Global Trade Magazines & Shows	[ ]

⇒ **Invoice me and ship the above** [ ]    **Signature:** \_\_\_\_\_  
⇒ **Contact me** [ ]    **Date:** \_\_\_\_\_  
⇒ **Send me more information** [ ]    **Specify:** \_\_\_\_\_

**Fax this completed form to (212) 213-6876**

Thank you!