

DIS Consulting Corporation

Publishing syndicated market surveys in media technology markets since 1982

Issued 08/23/07

Encoding Systems World tm 2007

The Survey Looks at Encoding Systems Bought in 2007 & Planned for 2008

- 20% Front-end discounts available on orders by November, 2007

Description of the Survey: Focuses on the Counting of Systems and Codec Types

General Overview:

This is the benchmark global survey, *Encoding Systems World™ 2007*, (and first survey) which follows on the design of the previous global surveys which we published in prior years. Looks at TV and cable stations, production and post-production, institutional facilities and telcos in terms of product and market coverage, influences and overall reporting detail. We will publish a comprehensive survey report, in March of 2008, showing all results in total (for all sub-markets) covering four major geographic regions and the four market segments.

Deliverables:

The clients will receive a CD-ROM *and* a hard copy of the survey results for those regions they have sponsored and for global totals if they have sponsored the survey on a global level.

The Market, Universe Size and Response Level That Were Sought (600+ are anticipated):

The report covers the U. S. A., E/ME/A (Europe/Middle East Africa), Asia and the Americas -- closely following manufacturer sales territories -- for activity among broadcast TV and cable TV stations, production and post-production facilities markets, shown with an estimated total responses to the trends and products questions of the study from which projections are made:

In all, 600 responses will be gathered for the report.

Vertical Markets	States United	Europe ME/Africa	Americas	Asia	total global 2005 Survey Response*
Broadcast TV Cable & Sat	60	50	20	30	160
Inst'l Facilities	30	20	10	20	80
Prod/Post Telcos	60	50	20	30	160
Total User Markets	150	120	50	80	400

DIS Multi Client Studies:

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Overall Design:

The design of *Encoding Systems World™2007* has been based on upon the various DIS benchmark surveys and the 37 years of experience that Douglas I. Sheer, DIS Consulting Corporation CEO has had in a variety of marketing, publishing, advertising, consulting and research positions and 25 years of experience that his firm DIS Consulting Corporation has had in conducting custom, large multi-client and proprietary end-user and dealer market research surveys in professional imaging and communications sectors, worldwide, since 1982. In all, we served more than 1,100 clients.

Recent Studies:

Other multi-client studies include: *Broadcast Servers World™ 2007* and *Video Graphics World tm 2007*, *Professional Camcorders World tm 2006* and *Video Switchers World tm 2007*. DIS Consulting Corporation also conducts numerous custom projects each year. This is the firm's 106th multi-client, syndicated market research project. The firm now deploys 18 global surveys, annually.

Experienced Staff:

DIS 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.

The Methods To Be Used:

The Use of Syndicated Direct Mail:

The syndicated multi-client research methodology used by DIS Consulting Corporation features a classical direct mail self-completion interviewing technique, where respondents fill out a pre-coded booklet-questionnaire that is sometimes augmented by telephone interviewing and/or focus groups. This methodology has been developed over 25 years to obtain maximum sample response and to be reliably project-able. Installed equipment is taken, census style and 12 months past purchases (2007) and plans to purchase over the next 12 months (2008) are gathered and will be updated periodically as suits the majority of clients. Other sections include media and shows, equipment budgets, purchase authority, brand image, staffing and technological trends.

Respondent Incentives:

Survey respondents will receive a summary *Encoding Systems World tm 2007 Trends Report* for their help, which we estimate to be worth at least \$650 USD to them.

Clients Make Inputs to Questionnaire and Report Formats:

The questionnaire is computer pre-coded and is designed to inventory facility installed brands and models, by product category. Data entry is achieved using a trained data entry clerks. Computer tabulation is done using a network of personal computers running the proprietary tabulation program. Microsoft Excel™ is used for the 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 report with the data.

List Sources & Sample Design:

Sample Frame and Lists Sourced:

The *Encoding Systems World tm 2007* project will use a fresh 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. That culling targets editors and chief engineers or the equivalent executives at each global TV and cable station. 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 will be utilized as well.

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 seek 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 the gear is.

Lists By Region and Marketplace

Markets	USA	Europe/ME/Africa	Asia	Americas
Broadcast/Cable/Satellite	NAB/SMPTE Broadcasting & Cable Ybk	NAB/IBC/Kemps World Guide to Film & TV	BA/IBC/NAB ABU/SMPTE World Guide	NAB/IBC World Guide Film & TV
Production/ Post-Production	NAB/SMPTE Yellow Pages	NAB/IBC/Kemps Sonovision, etc.	BA/IBC/NAB Kemps/China & Japan guides	NAB/IBC show guides Kemps
Institutional Facilities	NAB/SMPTE O'Dwyer's	IBC/Kemps/NAB Kompas	BA/IBC/NAB Kompas	NAB/IBC SET/Caper
Telcos	NAB/SMPTE	IBC/Kemps/NAB	BA/IBC/NAB	NAB/IBC

Additional in-country guides were also periodically 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 were tapped in certain countries to at least check against other lists.

Report Table of Contents:

FRONT MATTER	<i>Magazines, Trade Shows & Websites</i>
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<p>Cover & Spines Introduction & Methodology Preface & Purpose Project Staff Executive Summary Industry Forecasts – with 5-year span GENERAL REPORT <i>General</i> Type of operation Size of operation and Number of employees Leading applications as such: News, Streaming, Sports, Documentary, Programs, 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) Type of encoding applications Number of staff having access to editing systems Extent of purchase authority ADI or comparable ranking of stations Type of station or facility Technology Trends Type of codec/compression utilized Maximum bit rate capacity Use of storage Departments responsible for encoding systems Workflow patterns – shifting trends in post MPEG orientation and IP/IT issues HD/HDV orientation and transition Compression and codec use Computer platforms used and disk versus tape Year of first system purchase Year of latest purchase Use of Fiber Channel, FireWire, Ethernet or SCSI Troublesome problems such as crashes (use of firewalls) Summary of key features of encoding systems Software used Other systems that encoding systems integrate with And, much more ... (The report TOC plan is also available)</p>	<p>Trade magazines read and preferred Single most valued Trade shows attended and planned Single most valued Websites visited and preferred PRODUCT REPORT – By vertical market and region Number of encoding systems owned (installed) Number of units by brand Number of units by brand, model, type or series/packages 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 BRAND IMAGE REPORT Brand Image Rankings of major brands of encoding systems including: For a) price, b) quality, c) reliability and d) after-sales-service FOR: Apple Anystream AJA Avid/Softimage/Pinnacle Autodesk/Discreet Digital Rapids Elgato Evertz Exanet Grass Valley Group (Thomson) Harmonic Harris/Leitch/ASC Konan Modulus Quantel Panasonic Snell & Wilcox Sony Tandberg Telarity Others [see questionnaire draft for details] ADDENDUM Breakdown of responses & Copy of 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. There are three types of reports available:

1. Product Reports:

- **Product encoding category and related aspects were surveyed**
- **Unit and market value data – By Application (e. g. ‘News/ENG’)**
- **Brand and leading model market shares**
- **Installed base (owned)**
- **Purchases in the past 12 months and value (2006)**
- **Plans to buy in the next 12 months and value (2007)**
- **Prospects for out years, 5-year forecasts (2007-2011) by application and market**
- **Custom reports available (special cross-tabulations)**

2. General Marketing & Media Reports

- **Trends relating to the overall state-of-the industry**
- **Equipment budgets and buying habits including software packages**
- **Demographics**
- **New Technologies, applications and trends, such as IP/IT**
- **Applications planned/used for News, Streaming, MPEG, Sports, etc.**
- **Trade magazine readership and Trade Show attendance and preference**
- **Website visiting and preference**

3. Brand Image Reports

- **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 product categories required. Each product category purchase includes the General Reports. The Brand Image Reports are included with a purchase of three or more product category reports. Pre-Publication Sponsor prices (pre-September 30th, 2005) are lower than post publication (May 31st, 2006 and beyond) prices. Consult us for Package and Custom Cross Tabulation Pricing.

<i>Encoding Systems World™ 2007 The first Global BENCHMARK survey`</i>	<i>Front-End Prices</i>	<i>Post- Publication Prices</i>
<i>Report Type*</i>	<i>Orders Before Fielding November, 2007 (-20% discounted)</i>	<i>Orders After Publication March, 2008</i>
<i>Regional OR By Vertical Segment Reports</i>		
• <i>1 region or segment</i>	\$5,950	\$7,140
• <i>2 regions or segment</i>	\$6,961	\$8,353
• <i>3 regions or segment</i>	\$8,144	\$9,772
• <i>ALL 4 regions (Global FULL Sponsorship)</i>	\$9,950 <u>FULL</u> <u>GLOBAL</u>	\$12,050 <u>FULL</u> <u>GLOBAL</u>
<i>Brand Image Report (global)</i>	\$3,495	\$4,195
<i>Brand Image Single Region</i>	\$2,495	\$2,995
<i>Trade Media & Shows Sections Only</i>	\$2,495	\$2,995

* 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™

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Encoding Systems World tm 2007

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

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

USA Report (<i>USA tm 2007</i>)	[]
Europe/ME/A Report (<i>E/ME/A tm 2007</i>)	[]
Americas Report (<i>Americas tm 2007</i>)	[]
Asia Report (<i>Asia tm 2007</i>)	[]
Full Global Report (<i>World tm 2007</i>)	[]
Brand Image Only USA	[]
Brand Image Only Europe/ME/Africa	[]
Brand Image Only Americas	[]
Brand Image Only Asia	[]
FULL Global Brand Image	[]
Trade Magazines & Shows USA	[]
Trade Magazines & Shows Europe/ME/Africa	[]
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