

DIS Consulting Corporation

Publishing syndicated market research surveys in media technology markets since 1982

In collaboration with Kane Consulting, Inc.

Broadcast Automation World™ 2007

BAW 2007 will be published in January 2008

20% Front-End Discounted Price Available Thru November, 2007

Survey Description

General Overview:

Broadcast Automation World™ 2007 is the first global Broadcast TV Automation systems survey ever conducted, covering broadcast & audio-video related automation software and hardware amongst broadcasters and other professionals and, slated to become the most comprehensive syndicated market research survey ever conducted regarding these products. Sectors covered include: 1) Broadcast TV & Cable stations, groups and networks, 2) Broadcast-oriented production services providers and studio production facilities, 3) Institutional and 4) Telephone Companies and PTT (Telcos) facilities, in terms of product and market coverage, influences and overall reporting detail. In January 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 (USA, EMEA, Asia-Pacific and the Americas). Those reports will be modularly available for purchase.

Key Issues:

Professionals often use automation for Play-out, News, or Studio Production, as well as for Media Management. Among key issues to be clarified by *BAW 2007* are: number of channels automated by installation, devices managed through automation, storage styles, software types, market trends (such as central cast, file-based ingest, supervision and monitoring, outsourcing), interface with NRCS and traffic, storage capacity in bytes and hours/days, automation workflows, use and preference for type and brands of systems, perception and preferences for new technologies, types of 'rich media' stored and manipulated and many other technology trends attendant to automation in broadcast and professional environments. (Servers are studied separately in our *Broadcast Servers World™ 2007* global reports each year as storage issues in *Media Storage World™ 2007*).

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 tracking 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 Universe

Vertical Markets	States United	Europe ME/Africa	Americas	Asia	total global 2007 Survey Response sought*
Broadcast TV Cable & Sat	65	65	45	25	200
Institutional facilities	65	65	45	25	200
Broadcast type Production and Studio Facilities	35	35	30	15	115
Telephone Companies & PTTs	30	30	15	10	85
Total User Markets	195	195	135	75	600

DIS Multi-client Studies

Overall Design:

The design of *Broadcast Automation 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. 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.

Collaboration with Kane Consulting:

For this project, DIS is collaborating with Kane Consulting, Inc., a highly experienced consulting and research firm with deep experience in automation. Headquartered in Paris, France, Kane Consulting had a track record of delivering market trends analyses, product assessments, and benchmark studies to broadcasters and manufacturers, including 10 leading automation providers. Charles Bebert, managing director of Kane, and a 20-year veteran of the industry, is the team leader of the Kane Consulting automation team. Kane has worked with DIS on various custom projects regarding automation as well as other subjects.

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 *Broadcast Automation 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. 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 *Broadcast Automation 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 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 Kemp's International, The SMPTE Membership Guide, The World Guide to Film & TV and specialized in-country directories are used. Institutional facilities were sourced from via O'Dwyers Guide and other sources. The RTNDA list of news directors is also sourced to improve NEWS/ENG use coverage. Additionally, the Persky data base of European Audiovisual Observatory is sourced and provides a list of broadcasters and operators, by country, in Europe.

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.

Lists by Region and Marketplace

Markets	USA	EMEA	Asia	Americas
<i>Broadcast/Cable/Sat</i>	NAB/SMPTE Broadcasting & Cable Ybk RTNDA	NAB/IBC/Kemp's World Guide to Film & TV RTS, Persky	BA/IBC/NAB ABU/SMPTE World Guide	NAB/IBC World Guide Film & TV Set/Caper
<i>Institutional (Gov't, Med, Educ, Corp & Rel)</i>	NAB/SMPTE O'Dwyers	IBC/Kemp's Compass	BA/IBC/NAB Kemp's, etc.	NAB/IBC Set/Caper
<i>Production/Post-Prod</i>	NAB/SMPTE Yellow Pages	NAB/IBC/Kemp's Sonovision, etc.	BA/IBC/NAB Kemp's/China	NAB/IBC SET/Caper
<i>Telcos/PTTs</i>	TBD	Persky	TBD	TBD

Report Table of Contents

FRONT MATTER Cover & Spines Introduction & Methodology Preface & Purpose Staff Roles & Biographies Executive Summary Industry Forecasts GENERAL REPORT General Type of operation Size of operation, number of channels/playout center Leading applications and features such as: Play-out, News, Production, VOD/NVOD, Ingest, Ad Insertion, Commercial Break Off & Mobile 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 automation applications Type of controlled devices Number of staff having access to systems Pay back and cost reduction through automation Extent of purchase authority ADI or comparable ranking Type of station or facility Technology Trends Type of automation utilized Maximum automation capacity now and desired Use of RAIS 'daisy chain' approach Use of SANs, NAS, Flash, RAM and clusters Type of automation applications Departments responsible for automation system Automation workflow patterns MPEG, IP and HD issues Key features assessed Missing or needed features Computer platforms used Disk drives versus tape drives Year of first automation system purchase Year of latest 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 and planned Automation software used Other systems automation systems integrate with	Magazines and Trade Shows Trade magazines read and preferred Single most valued Trade shows attended and planned Single most valued Websites visited Trade association memberships PRODUCT REPORT(s) – Automation Systems (hard & soft) By vertical market and region Number of Automation Systems owned (installed) Number of Automation Systems 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 PRODUCT REPORT(s) – Automation Software Only By vertical market and region Number of Software units owned (installed) Number of Software units 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 BRAND IMAGE REPORT – By Genres 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 Brands to be included (but not be limited to): Avid, Aveco, Crispin, Colledia, CIS, Dayang, Etere, Emblaze, Fission, Florical, Harris, Hitachi, Ibis, Keres, Microfirst, Morpheus, NEC, Omnibus, On-Air, Pro-Bel, Pebble Beach, Sundance, Siemens, Sobey, SeaChange, SGT, Sony, Sun, TMD, Weggenger, Toshiba, etc. (See the questionnaire in Brand Image and in product genre sections to locate brands by name)
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Other workflow issues & Future preferred drives	
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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

- **Automation System (fully featured) and Software-only product categories and related 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 VOD/NVOD, Ad Insertion, Commercial Break Off, Ingest, Pod casting/Streaming, Mobile, 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: brand awareness, 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 & Term

Pricing is based on the number of regions and product categories required. Each product category purchase includes the General Reports. The Brand Image Reports are included with a purchase of three or more regions and/or product category reports. Pre-Publication Sponsor prices were lower than post publication prices. Consult us for Package and Custom Cross Tabulation Pricing.

Broadcast Automation World™ 2007 The first Global Market Survey	Pre- Publication Prices	Post- Publication Prices
Report Type*	Orders Before Fielding October, 2007 (-20% Discounted)	Orders After Publication after January, 2007
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 – 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>		
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

Broadcast Automation World™ 2007

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

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

USA Report (<i>Broadcast Automation World™ 2007</i>)	<input type="checkbox"/>
EMEA Report (<i>Broadcast Automation World™ 2007</i>)	<input type="checkbox"/>
Americas Report (<i>Broadcast Automation World™ 2007</i>)	<input type="checkbox"/>
Asia Report (<i>Broadcast Automation World™ 2007</i>)	<input type="checkbox"/>
Full GLOBAL Report (<i>Broadcast Automation World™ 2007</i>)	<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!