

Broadcast Workflow and Architecture Trends

The Dell EMC logo is centered on the page. The word "DELL" is in a bold, blue, sans-serif font, while "EMC" is in a white, outlined, sans-serif font. The letters are slightly shadowed, giving them a 3D appearance as if they are floating above the background.

Summary Results | May 2017

Survey Summary

- ▶ **Between February and May 2017, Gatepoint Research invited selected broadcast systems executives to participate in a survey themed Broadcast Workflow & Architecture Trends.**
- ▶ **Candidates were invited via email and 96 executives have participated to date.**
- ▶ **Management levels represented are predominantly senior decision makers: 19% hold the title CxO, 16% are VPs, 41% are Directors, and 24% are Managers.**
- ▶ **All Survey participants represent Television Broadcasting firms.**
- ▶ **Responders work for firms with a wide range of revenue levels:**
 - **32% work in Fortune 1000 companies with revenues over \$1.5 billion;**
 - **68% work in firms whose revenues are less than \$1.5 billion.**
- ▶ **100% of responders participated voluntarily; none were engaged using telemarketing.**

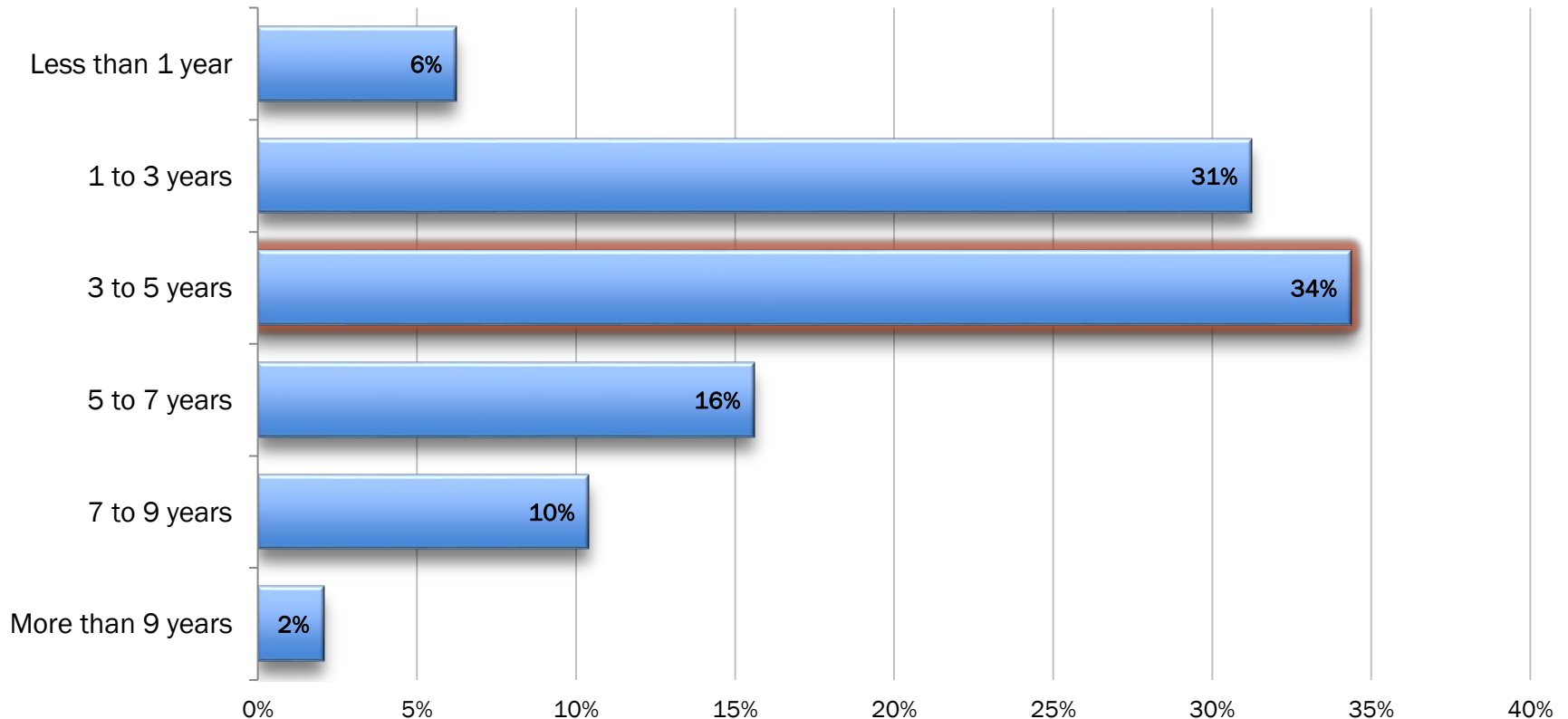
Executive Overview

File-based postproduction, broadcast, and content delivery have not only created explosive growth in the amount of content being stored. They also accelerate the need for archival and retrieval systems that can work smoothly and efficiently with a file-based workflow.

This survey asks respondents to report:

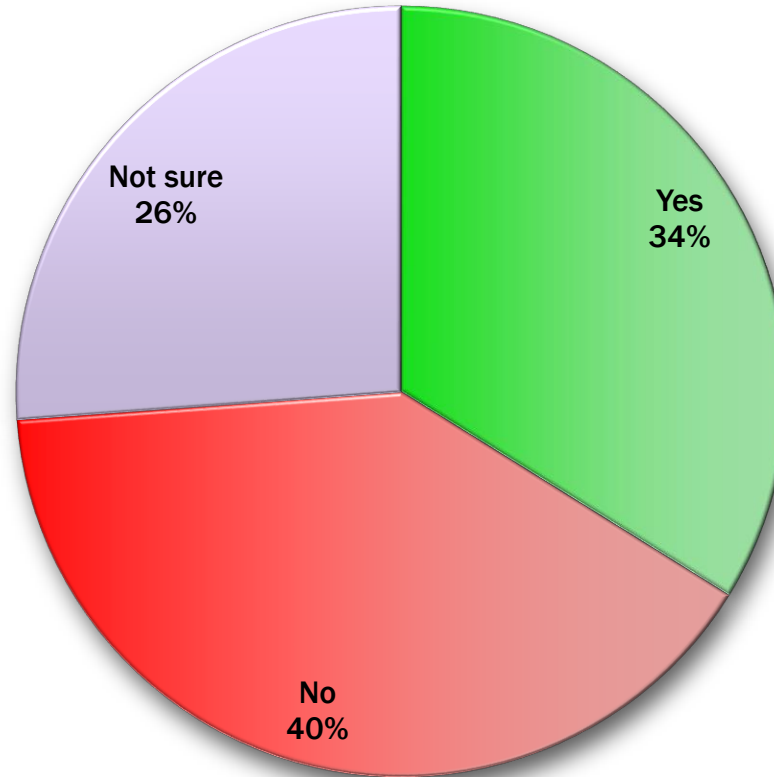
- ▶ **What percentage of their infrastructure is virtual now? How long do they think it will take them to complete the transition from SDI systems to virtualized, IP-based workflows?**
- ▶ **What factors do they feel are most critical for them to make the transition to IP? Do they think they have the skills and training to make this transition?**
- ▶ **Is Software Defined Networking (SDN) part of their workflow upgrade plan? Do they see complete virtualization of a broadcast environments becoming standard practice soon?**
- ▶ **How quickly is demand for content storage growing? What features are top priority in a new storage solution?**
- ▶ **What do they believe is critical to the success of future broadcast operations?**

How long do you think it will take to complete the transition from SDI systems to virtualized, IP-based workflows?



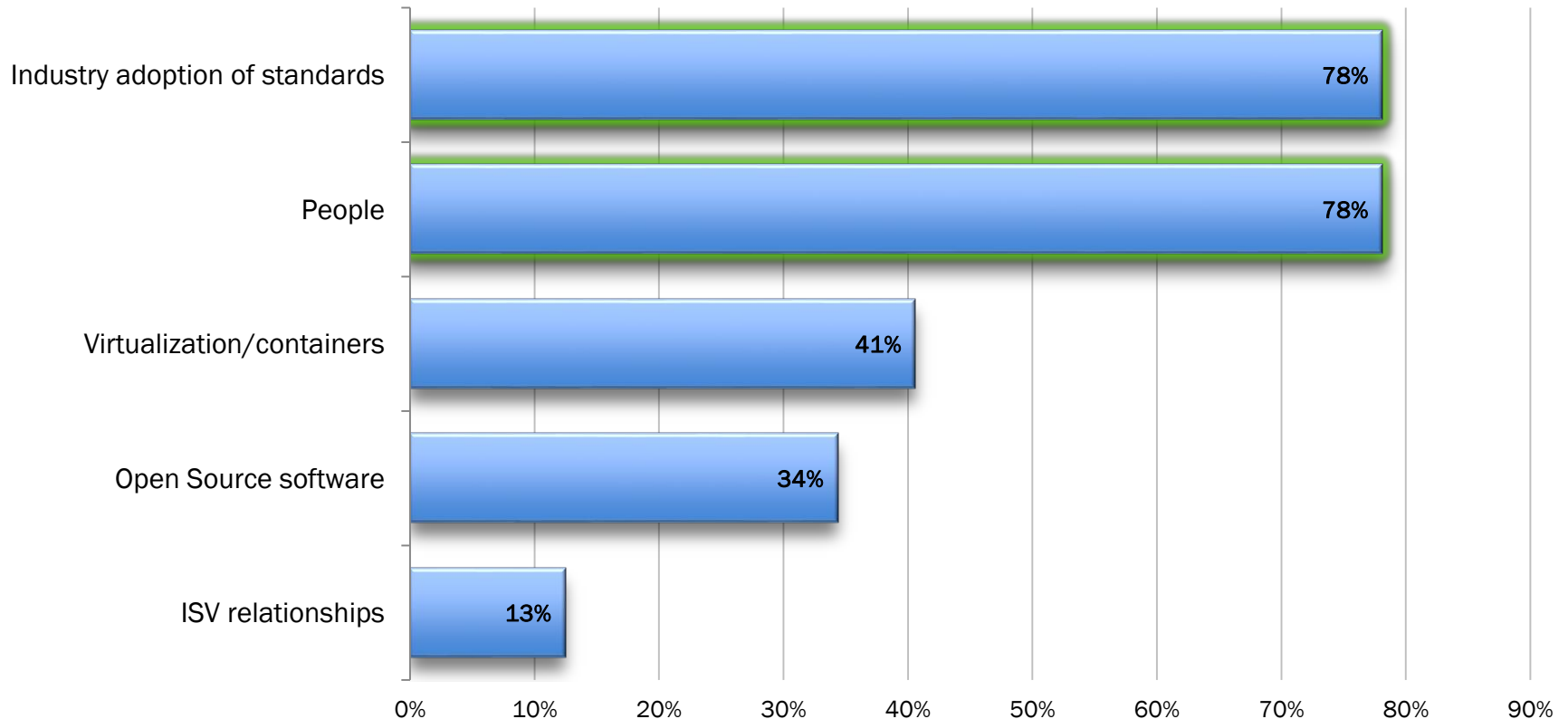
More than a third of respondents think it will take them between 3 and 5 years to complete the transition to virtualized workflows.

Do you believe you have the necessary skills and training to succeed in moving from SDI systems to virtualized, IP-based workflows?



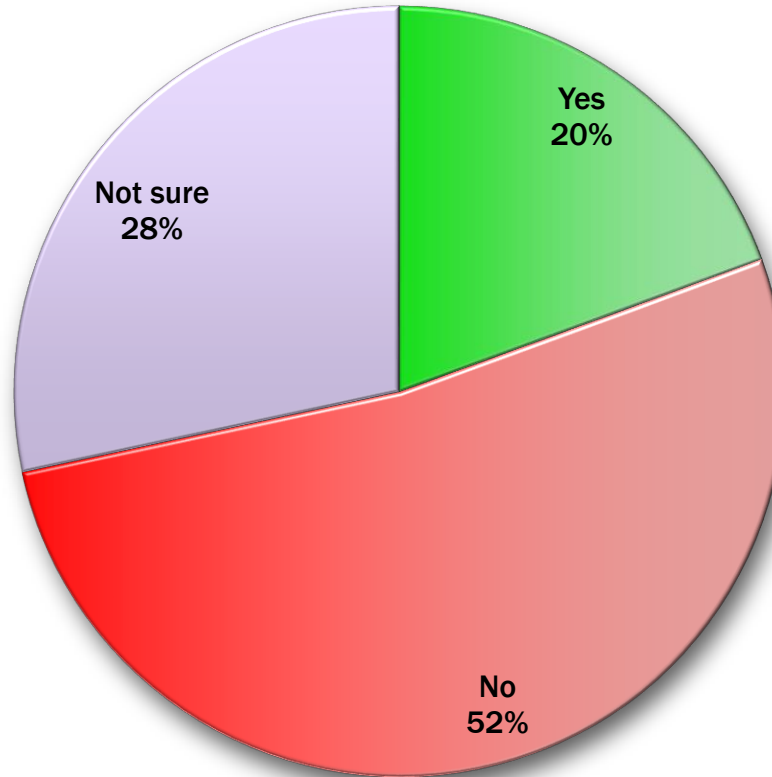
Of those in the survey, 40% do not believe they possess the skills and training to transition from SDI to virtualized IP based workflow. Another 26% are not sure.

What do you believe are essential factors for your transition to IP?



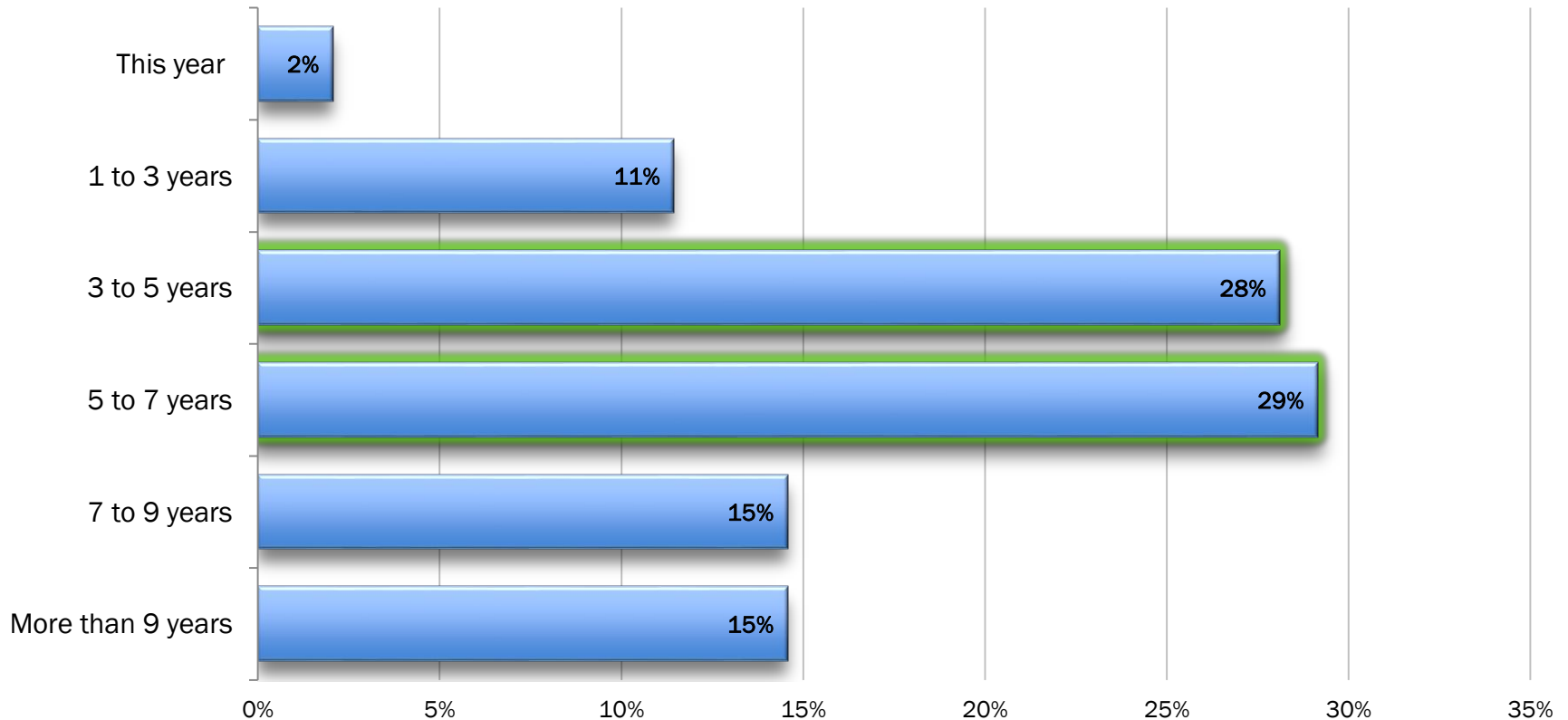
78% of respondents say that both industry adoption of standards *and* people are the most essential factors for their transition to IP.

Are you planning to build applications in-house in order to control or eliminate costs for application support, customization, and professional services?



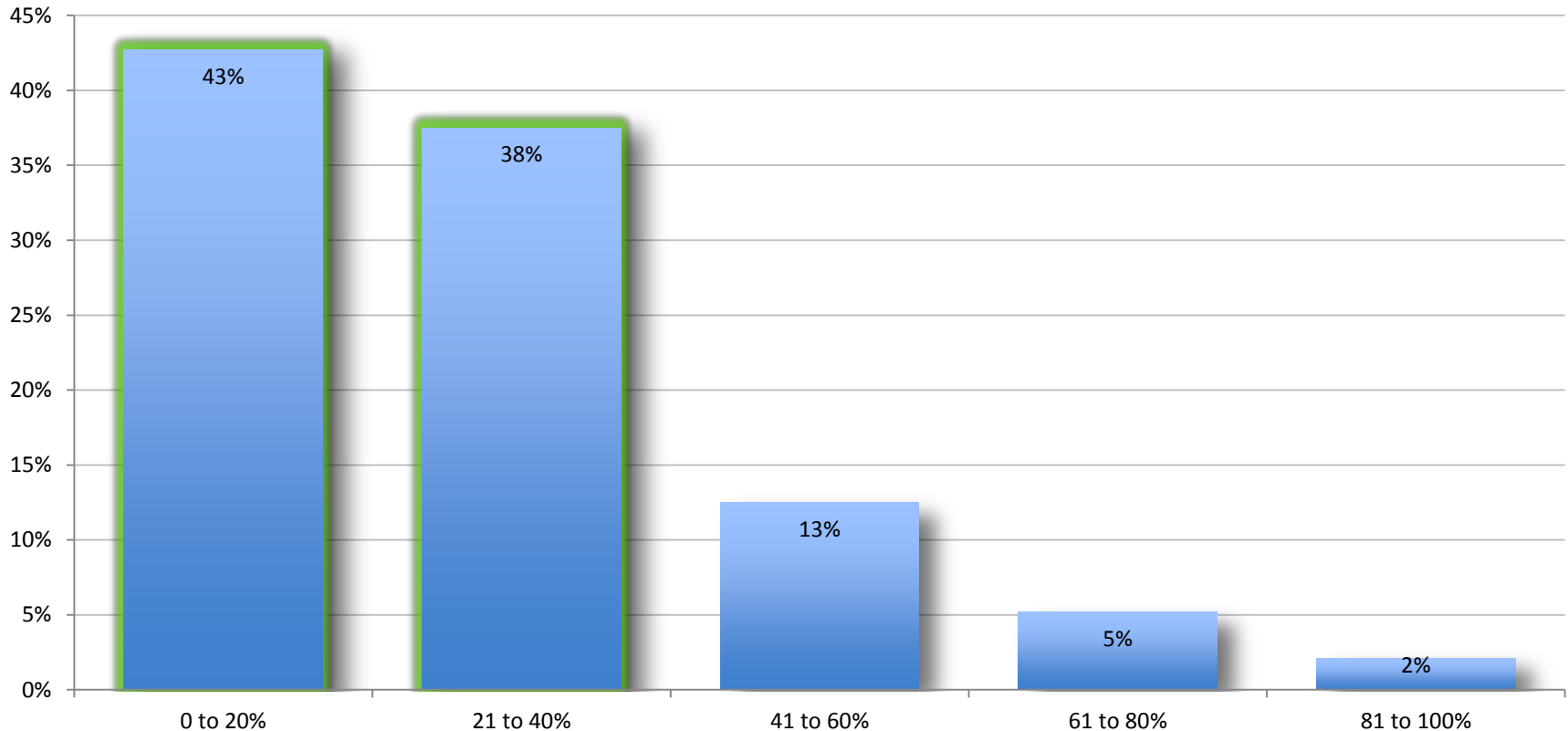
Over half of those surveyed flatly reject the strategy of building applications in-house to control costs.

When do you believe that complete virtualization of a broadcast environments will be a standard practice?



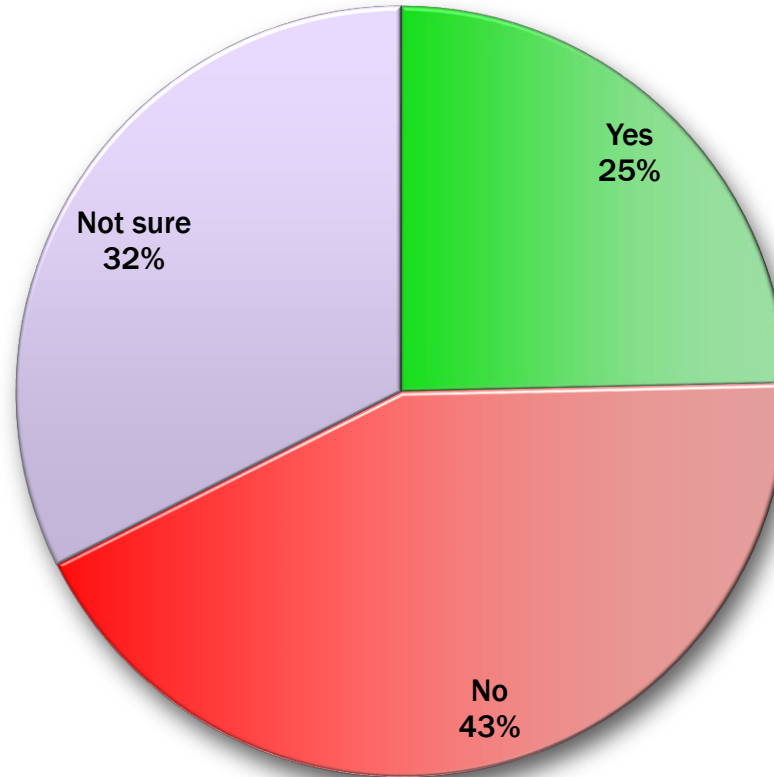
Asked to speculate on how long it will be until virtualization is standard practice in broadcast environments, 57% say it is 3 to 7 years in the future.

What percentage of your infrastructure environment is virtual?



81% of respondents report that less than 40% of their infrastructure is virtual.

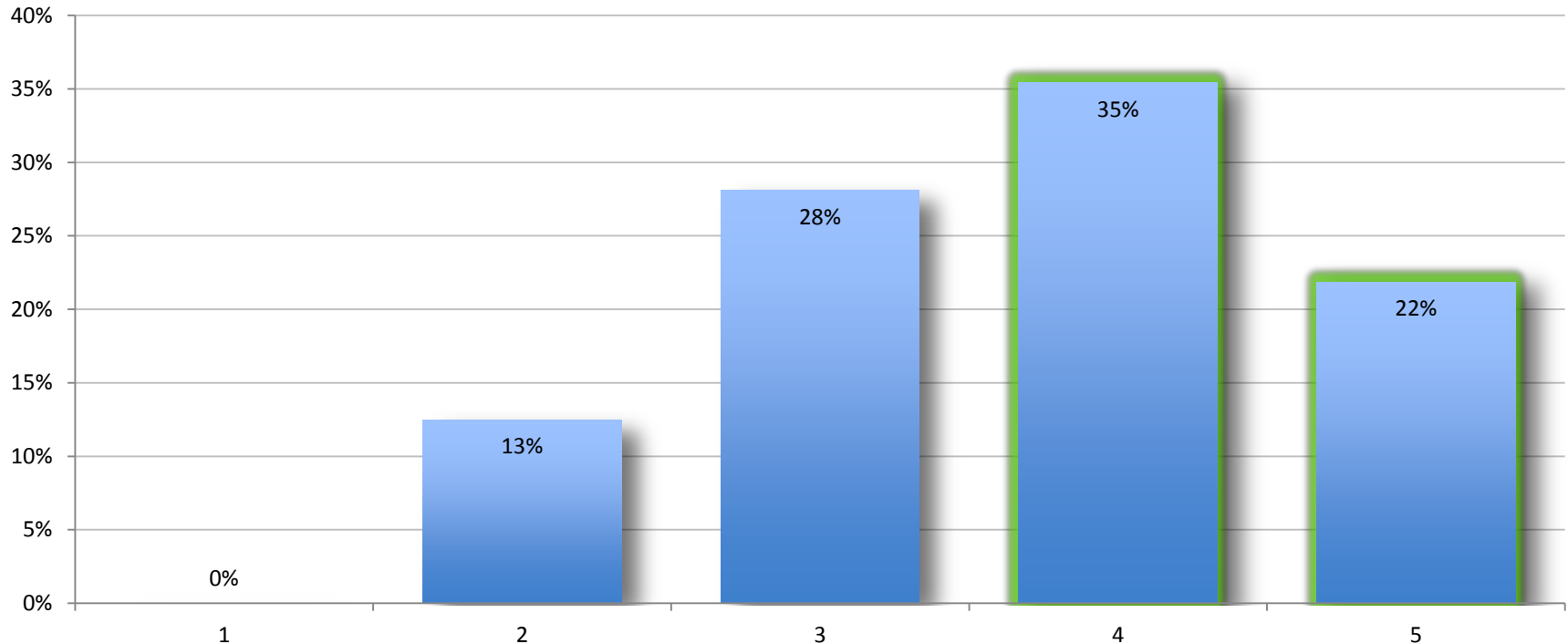
Is Software Defined Networking (SDN) part of your workflow upgrade plan?



25% of respondents say SDN is definitely in their workflow upgrade plan; another 32% are not sure.

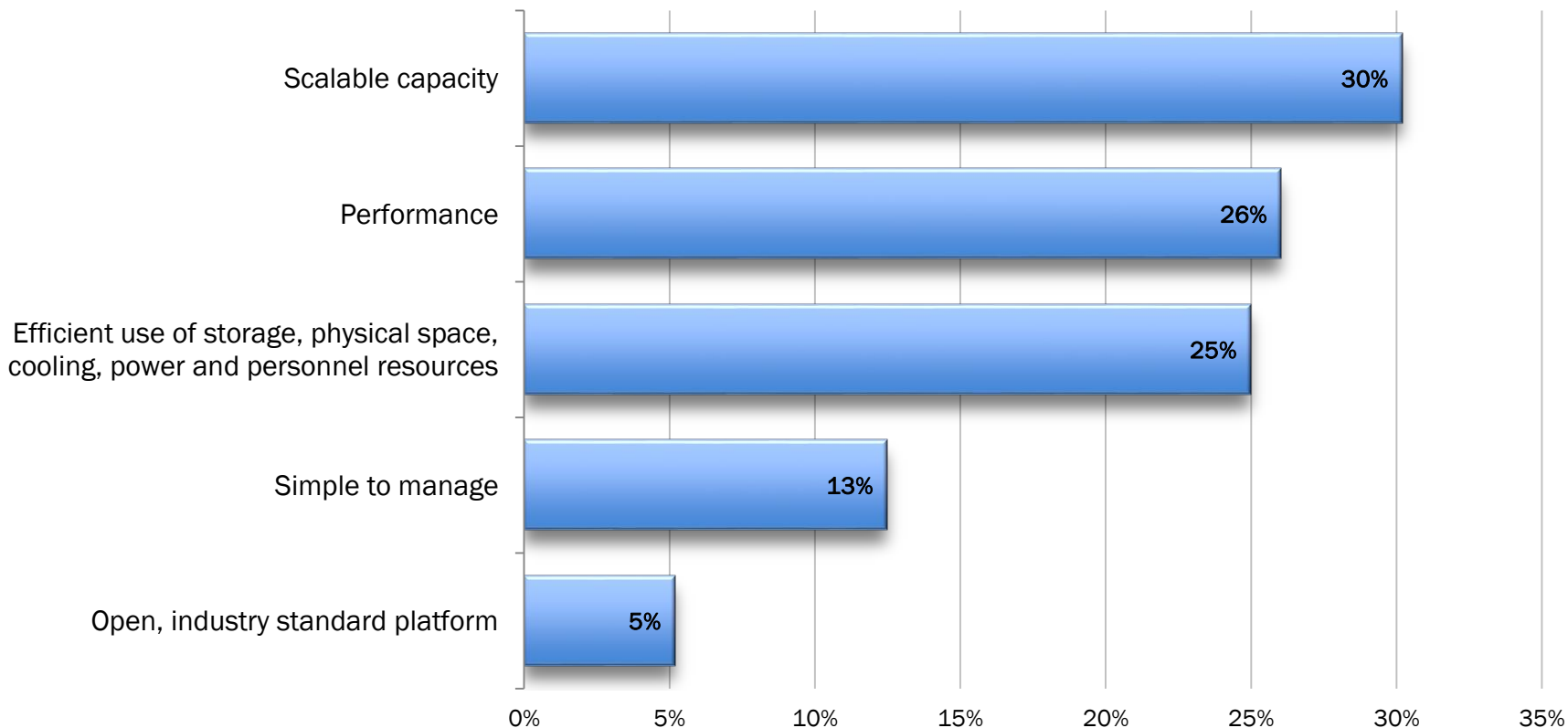
How quickly is your demand for content storage growing?

(Rate 1 to 5, 1=low growth rate, 5=rapid growth, it's a major concern)



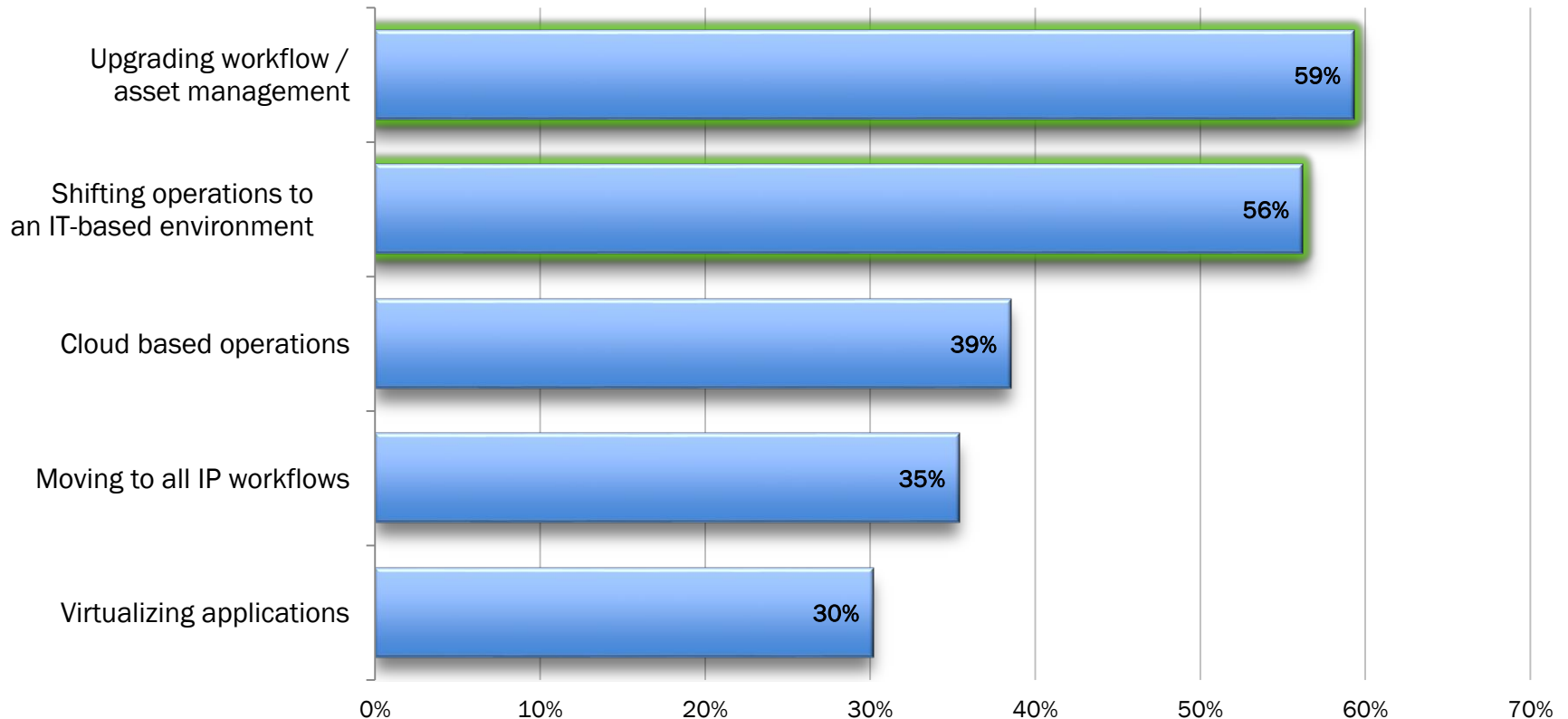
Of all respondents, none characterize the growth of content storage demand as low. Most (57%) say demand for storage is growing rapidly and is a major concern.

What is your top priority when evaluating a storage solution?



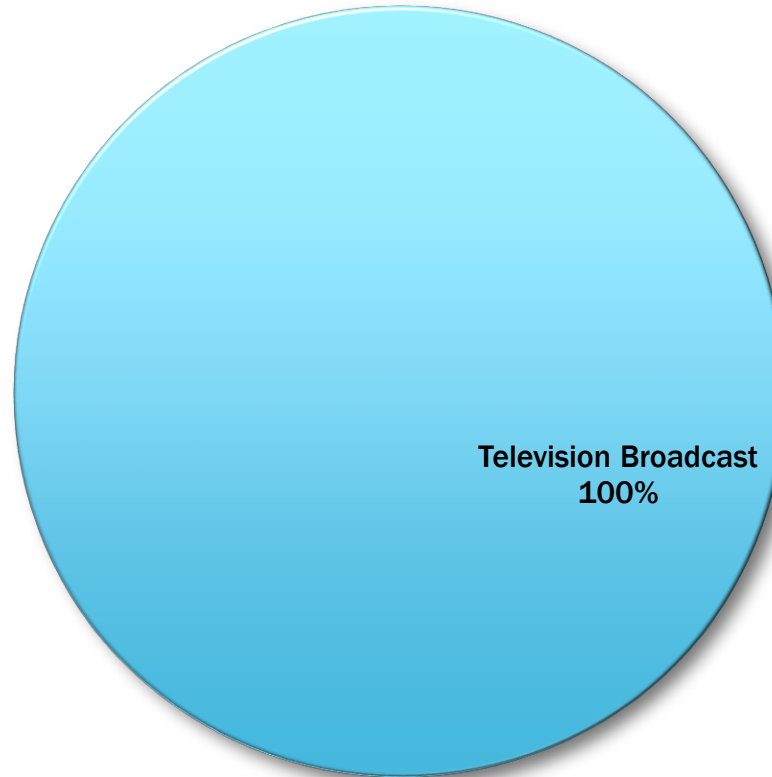
By a slight margin, respondents rate scalable capacity as their highest priority when evaluating storage solutions. Nearly as critical are performance and efficiency.

What do you believe is critical to the success of future broadcast operations?



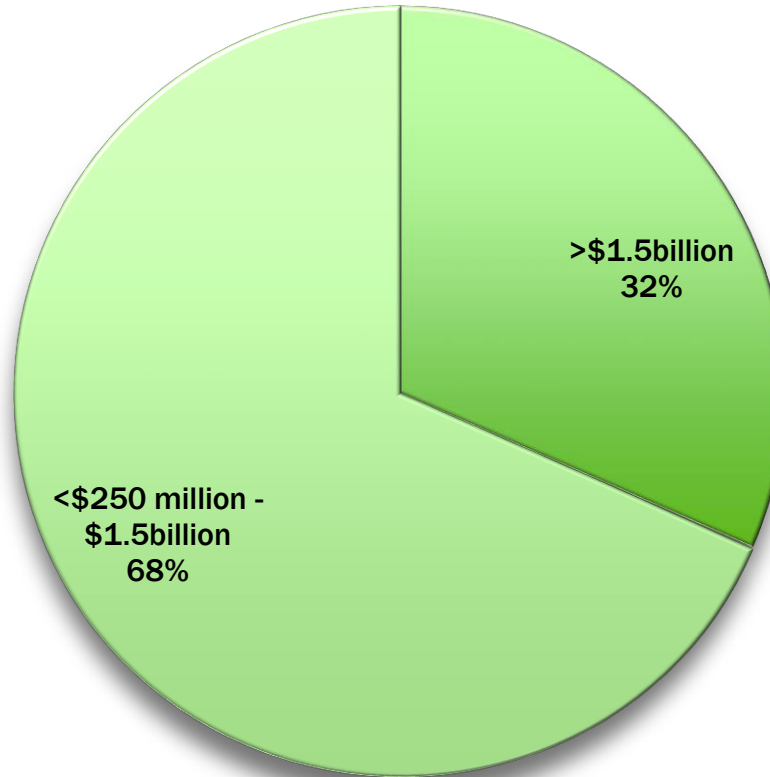
Most respondents say the two most critical changes needed to insure the future viability of their broadcast operations are an upgrade of their workflow/asset management (59%) and migration to an IT environment (56%).

Profile of Responders: Industry Sectors



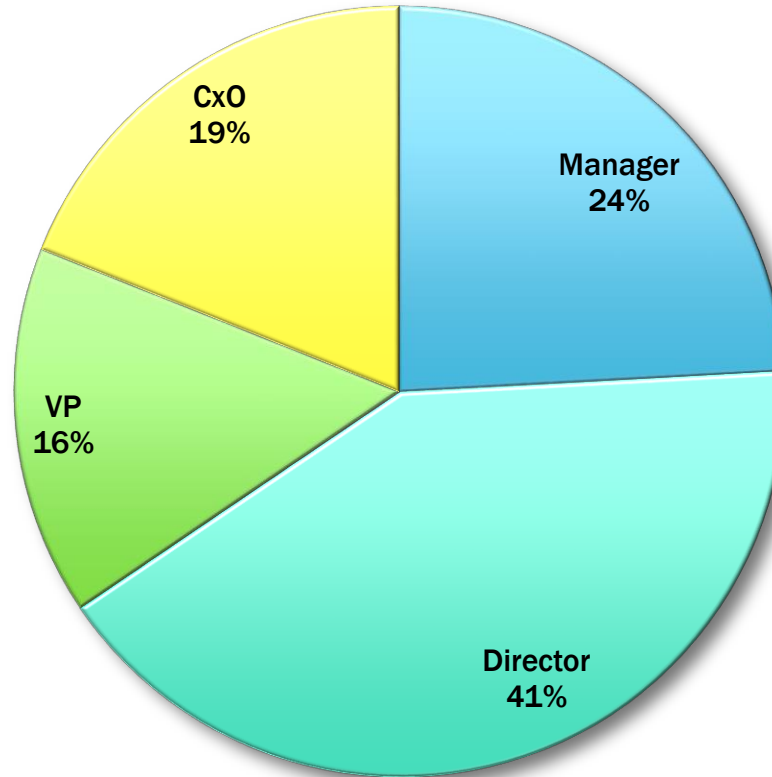
Responders all work in Television Broadcast Stations.

Profile of Responders: Revenue



32% of those surveyed work in Fortune 1000 companies with revenues over \$1.5 billion.

Profile of Responders: Job Level



76% of those surveyed hold executive level positions in their organizations.



Dell EMC provides media professionals with file-based storage that enables seamless collaboration and processing in the digital media value chain.

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