



2022 Digital Storage for Media and Entertainment Report

-- Digital Storage for the Capture, Creation, Editing, Archiving and Distribution of Entertainment Content --

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Coughlin Associates



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Table of Contents

Acknowledgements	11
The Author	12
Executive Summary	12
Key Points.....	13
Introduction.....	16
Cinema and Video Formats	21
Media and Entertainment Professional Storage Survey.....	35
Content Creation and Acquisition.....	36
Feature Film Acquisition	36
TV Production	54
Film Scanning.....	56
Storage Capacity Projections for Digital Content Acquisition	58
Post Production including Editing and Special Effects.....	64
Non-Linear Editing (NLE)	64
Post Production Storage	69
Flash Memory for Editing	72
Editing and the Cloud	78
Special Effects and Other Post Production.....	85
Summary Post-Production Digital Storage Capacity Demand	85
Storage Capacity and Storage Revenue Projections for NLE, Special Effects and Other Post Production Activities.....	86
Media and Entertainment Content Distribution	98
Lower Bandwidth Richer Media Distribution Technology	101
Local Broadcast.....	104
Cable Distribution	110
Satellite Headend.....	116
TV Networks.....	116
Digital Cinema	128
Hard Disk Drives Used in Digital Cinema.....	131
Assumption for Digital Cinema Storage.....	131
Professional Media and Entertainment Internet Distribution	137
Video on Demand (VOD).....	149
Summary of Non-Archive Entertainment and Media Storage	159

<i>Archiving and Digital Preservation.....</i>	<i>172</i>
Hard Disk Drives	172
Magnetic Tape	174
Optical Discs	178
Cloud and Object Archive Storage	181
Survey Archive Results.....	188
Digital Conversion of Older Analog Content	193
Costs of Digital Conversion.....	194
Costs of Long-Term Storage	197
Archiving of Digital Created Content	197
Total Archive and Preservation Storage Projections	198
Archiving Storage: Off-line, Near-Line, in the Cloud	198
Uses of Archived Content—Making an Archive ROI	206
Migration of Content to Avoid Format Obsolescence	206
<i>Capacity Requirements by Market Segment.....</i>	<i>208</i>
<i>Storage Revenue Estimates by Market Segment</i>	<i>217</i>
<i>Storage Media Projections.....</i>	<i>227</i>
Touch Rate Versus Response Time	227
Response time definition	227
Touch rate definition	227
Touch rate vs. response time.....	228
Technology regions	229
IO Object size curve	230
Media Projections for Media and Entertainment	232
<i>Conclusions.....</i>	<i>244</i>
<i>Some Media and Entertainment Market Companies</i>	<i>251</i>
<i>NEWSLETTER SUBSCRIPTIONS.....</i>	<i>254</i>

Table of Figures

Figure 1. Digital Entertainment Content Value Chain (An Accelerating Positive Feedback Loop).....	16
Figure 2. Digital Entertainment Content Workflow.....	17
Figure 3. Hybrid Motion Picture Production and Post-Production using Digital Intermediates	18
Figure 4. Report Assumptions for High End Movie Resolutions over Time	25
Figure 5. Statistics for Ang Lee's Billy Lynn's Long Halftime Walk.....	27
Figure 6. Ang Lee's Data Center	27
Figure 7. Setup and Application of Canon's Free Viewpoint Video System.....	30
Figure 8. Video Resolution Comparisons.....	31
Figure 9. Content is made up of Essence plus Metadata.....	32
Figure 10. Uses and Flow of Metadata in the Entertainment Content Process	33
Figure 11. Spheracam VR Video Camera Setup	38
Figure 12. Jaunt One Video Camera Rig	39
Figure 13. Spherical Image Display	39
Figure 14. ARRI Mini LF 4K S35 Camera and SSD Recording Media	40
Figure 15. Canon EOS C300 Mark II DSLR Used for Professional Video	41
Figure 16. For-A Super Slo-Mo Camera	41
Figure 17. LG OLED 8K X 4K LCD Display.....	42
Figure 18. NHK 8K Portable Camera	43
Figure 19. NHK 8K Portable Camera Schematic.....	43
Figure 20. Sharp 8K Portable Camera	44
Figure 21. Red MONSTRO 8K VV Sensor for Weapon Cameras	44
Figure 22. Percentage of recording media in professional video cameras.	45
Figure 23. Content Shot for an Hour of Completed Work	47
Figure 24. Panasonic Micro P2 Flash Module and Adapter.....	49
Figure 25. Sony SxS Flash Memory Camcorder Modules	49
Figure 26. Sony External Video Recording SSD	50
Figure 27. Angelbird CFast Compact Flash Card.....	50
Figure 28. Angelbird SD Cards for Professional Video Camera	51
Figure 29. ProGrade SFEXPRESS 1.0 1 TB Memory Card	51
Figure 30. G-Technology ev Series Reader Atmos Master Caddy.....	52
Figure 31. LaCie 2big Dock Thunderbolt 3 Drive.....	53
Figure 32. NHK Super High Vision Equipment Roadmap	55
Figure 33. Percentage Scanned into Different Digital Resolutions.....	57
Figure 34. Digital Content Generation Capacity Projections.....	62
Figure 35. Annual Storage System Capacity Growth for Digital Content Acquisition	63
Figure 36. Professional Non-Linear Editing Model System.....	64
Figure 37. DAS vs. Shared Storage and Number of People in a Post Facility	67
Figure 38. Physical Distribution Media for Proxies or Completed Post Work	69
Figure 40. Seagate Lyve Drive Data Platform.....	71
Figure 41. Pixit Media Excelero 8K+ Workflow	73
Figure 41. OWC ThunderBlade	76
Figure 42. WD G-Drive Mobile SSD-R	76

Figure 43. AWS Snowball Data Transport Solution	81
Figure 44. Example Render Farm Layout.....	83
Figure 45. Pixar Render Farm	84
Figure 46. Post Production Storage Capacity Annual Demand (TB).....	92
Figure 47. Projections for Post Production, CGI/FX New Storage Requirements.....	94
Figure 48. Price of Storage/GB for Facility Niche	96
Figure 50. Toshiba On-Air Max Flash.....	100
Figure 51. Bit Rate Reduction Curve Showing Big-Rate Savings between H.264 (AVC) and HEVC (Horizontal Axis indicates Quality Target Resolution).....	102
Figure 51. Local Broadcaster Content Distribution Storage Capacity Analysis.....	108
Figure 52. Estimate of Local Broadcaster Distribution Network Storage TAM (\$M)....	109
Figure 53. Cable Head End Distribution Storage Capacity Analysis.....	114
Figure 54. Estimate of Cable Head End Network Storage TAM (\$M).....	115
Figure 55. Satellite Head End Distribution Storage Capacity Analysis	120
Figure 56. Estimate of Satellite Headend Network Storage TAM (\$M).....	121
Figure 57. TV Network Delivery Storage Capacity Analysis.....	125
Figure 58. Estimate of TV Networks Local Near-Line and Cloud Storage Capacity (TB)	126
Figure 59. Estimate of TV Master Networks Network Storage TAM (\$M).....	127
Figure 60. USB Hard Drive for Movie Distribution to Theatre (Mercado Theatre in Santa Clara, CA).....	128
Figure 61. Schematic of a Play-To-Screen Server with Functional Blocks (Thompson Grass Valley)	129
Figure 62. Digital Cinema Projector	129
Figure 63. Schematic Digital Projector Showing IMB Containing Content Storage (a) and with content storage external to the IMB (b)	130
Figure 64. Integrated Media Block Containing HDDs	131
Figure 65. Annual New Storage Capacity for Digital Cinema	135
Figure 66. Estimate of Digital Cinema Storage TAM (\$M)	136
Figure 67. Internet Content Distribution System (CDN).....	137
Figure 68. Eluv.io's Content Fabric.....	139
Figure 69. Level 3's Content Delivery Network	140
Figure 70. Internet Content Delivery Storage Capacity Analysis	147
Figure 71. Estimate of Internet Content Delivery Network Storage TAM (\$M).....	148
Figure 72. IBM Flash-based Content-Delivery Servers	150
Figure 73. Video on Demand Total Storage Capacity Model	155
Figure 74. Annual Growth in Video on Demand Storage Capacity.....	156
Figure 75. Estimate of VOD Storage TAM by Category (\$M).....	157
Figure 76. Estimate of Cloud and Conventional VOD Storage Capacity.....	158
Figure 77. Non-Archive Media and Entertainment Annual Network Storage TAM Estimate.....	160
Figure 78. Non-Archive On-Line Network Annual Storage TAM Estimate	161
Figure 79. Non-Archive Near-Line Network Annual Storage TAM Estimate.....	162
Figure 80. Non-Archive Object Storage Annual TAM Estimate.....	163
Figure 81. Non-Archive Direct Attached and Local Storage Annual TAM Estimate	164
Figure 82. Total Non-Archive Storage Annual TAM Estimate	165

Figure 83. Non-Archive Network Storage Capacity Annual Demand Estimate	166
Figure 84. Non-Archive On-Line Network Storage Capacity Annual Demand Estimate	167
Figure 85. Non-Archive Near-Line Network Storage Capacity Annual Demand Estimate	168
Figure 86. Non-Archive Object Storage Capacity Annual Demand Estimate	169
Figure 87. Non-Archive Direct Attached Storage and Local Storage Capacity Annual Demand Estimate.....	170
Figure 88. Non-Archive Total Storage Capacity Annual Demand Estimate	171
Figure 89. HDD Cartridge Products (RDX).....	172
Figure 90. ATSC HDD Technology Roadmap.....	173
Figure 91. LTO Projected Tape Generations	175
Figure 92. LTO-9 Tape Cartridges and Drive.....	175
Figure 93. Uses for LTFS Tape in Media and Entertainment Workflows.....	178
Figure 94. Sony/Panasonic Optical Archive Roadmaps.....	179
Figure 95. Sony Blu-Ray Optical Disc Cartridge and Drive.....	180
Figure 96. XenData Tape or Optical Disc Library	180
Figure 97. Elements in an AXF Object Wrapper.....	183
Figure 98. Spectra Logic's Vail Workflow.....	187
Figure 99. Percentage of Digital Long-Term Archives on Various Media.....	190
Figure 100. Percentage of Tape Formats Used in Digital Archiving.....	193
Figure 101. Example Workflow for Analog to Digital Video Conversion.	195
Figure 102. GBH Transport and Object Storage Solution.	196
Figure 103. Total Annual Digital Storage Demand Projections for Archiving and Digital Content Conversion & Preservation.....	202
Figure 104. Annual Growth in Near-Line and Off-Line Digital Storage for Content Archiving	203
Figure 105. Annual Archive Object Storage for Content Archiving	204
Figure 106. Cloud vs. Local Archive Storage	205
Figure 107. Relationship Between Archive Content and Multiple Real-Time and Non-Real-Time Distribution Content.....	206
Figure 108. Media and Entertainment New Cloud Storage Capacity Projections	215
Figure 109. Media and Entertainment New Object Storage Capacity Projections.....	216
Figure 110. Media and Entertainment Cloud Storage Revenue Projections.....	225
Figure 111. Media and Entertainment Object Storage Revenue Projections.....	226
Figure 112. Touch rate versus response time indicating various types of uses	229
Figure 113. Digital storage technologies regions overlaid on the Touch Rate/Response Time chart.....	230
Figure 114. Touch/Y and response time for 100% random IO in a 4 TB capacity HDD	231
Figure 115. Touch/Y and response time for 4 TB capacity HDD, LTO Tape and Blu-ray Discs.....	232
Figure 116. Media Annual Revenue Estimate Summary (\$M)	236
Figure 117. Tape Cartridge Annual Unit Shipment Projections.....	241
Figure 118. Optical Disk Unit Annual Unit Shipment Projections.....	242
Figure 119. HDD & Flash Annual Unit Shipment Projections	243

Figure 120. Distribution of Storage Capacity for Entertainment Creation, Archiving, and Distribution Segments (2020).....	244
Figure 121. Distribution of Storage Capacity for Entertainment Creation, Archiving, and Distribution Segments (2026).....	245
Figure 122. Media and Entertainment Market Storage Revenue Share by Segment (2020).....	246
Figure 123. Media and Entertainment Market Storage Revenue Share by Segment (2026).....	246
Figure 124. Market Share of Storage Media by Storage Capacity Shipped (2020).....	247
Figure 125. Market Share of Storage Media by Storage Capacity Shipped (2026).....	247
Figure 126. Market Share of Storage Media by Revenue (2020)	248
Figure 127. Market Share of Storage Media by Revenue (2026)	248
Figure 128. M&E Flash Memory Revenue by Application (2020)	249
Figure 129. M&E Flash Memory Revenue by Application (2026)	249

List of Tables

Table 1. Example Resolution, Data Rates and Storage Capacity Requirements for Professional Media Content (assumes no chroma subsampling).....	23
Table 2. Some 4K and Beyond Camera Codecs	24
Table 3. Feature Film Metrics (24 fps, 10-bit color, 4K Bayer Format)	25
Table 4. Percentage of survey participants in content market segments.	35
Table 5. Survey participant locations	36
Table 6. Uncompressed Format Assumptions for 1 Hour of Full Resolution Raw Content	37
Table 7. Comparison of Professional Video Camera Media Trends	46
Table 8. Survey Question: What % of your Content is Born Digital.....	47
Table 9. Comparison of 2010-2021 for Hours Shot for an Hour of Completed Content	48
Table 10. Comparison of 2010, 2012-2020 Scanned Resolutions	57
Table 11. Feature Film Projection Assumptions	59
Table 12. TV Broadcast Assumptions	60
Table 13. TV Episodic Assumptions	60
Table 14. General Assumptions for Movie & TV Content.....	60
Table 15. Feature Film Scanning Digital Storage Requirements.....	61
Table 16. Assumptions for Film Scanning Projections.....	61
Table 17. Assumptions for Storage Systems Capacity Projections.....	61
Table 18. Proxy Distribution Media Trends.....	68
Table 19 Professional NLE Bandwidth Requirements	85
Table 20. Professional Post-Production Storage Assumptions	87
Table 21. Professional Post Production Storage Projections (High End).....	88
Table 22. Special Effects and Other Special Production Activities Storage Projections	91
Table 23. World-Wide Post Facilities Capacity Growth Estimates (On-Line, Near-Line and DAS/Local)	93
Table 24. Post-Production Facility Spending Assumptions (\$/GB).....	95
Table 25. World-Wide HE/MR NLE Facilities Network Storage Spending Estimates....	97

Table 26. Average Percentage content on physical media for professional content distribution	99
Table 27. Comparison of Costs for Streaming Content with HDDs and SSDs (from Quantum).....	101
Table 28. Additional Assumptions on Local Broadcast Content	105
Table 29. Estimate of WW Local Broadcast Storage Capacity Requirements and Spending.....	106
Table 30. Cable Head End Assumptions.....	111
Table 31. Estimate of WW Cable Head End Storage Spending	112
Table 32. Satellite Headend Assumptions.....	117
Table 33. Estimate of WW Satellite Head End Storage Spending	118
Table 34. TV Master Network Assumptions	122
Table 35. Estimate of WW TV Master Network Storage Spending	123
Table 36. Digital Cinema Storage Estimate Assumptions.....	133
Table 37. Digital Cinema Storage Estimate.....	134
Table 38. Internet Content Delivery Assumptions	144
Table 39. Estimate of WW Internet Content Delivery Storage Spending	145
Table 40. VOD Capacity Model Assumptions	152
Table 41. Video on Demand Storage Capacity Model.....	153
Table 42. Simplified percentage growth rate of various archival media types.....	192
Table 43. 2006 Estimated Costs for Archiving Motion Picture Materials on HDD Arrays and a Tape Library for Year 1 (1 TB) ²⁸	197
Table 44. Assumptions for Archiving and Digital Preservation.....	200
Table 45. Archiving and Digital Conversion and Preservation Storage Projections	201
Table 46. Annual New Capacity Projections by Media and Entertainment Market (Petabytes).....	209
Table 47. Annual New Direct Attached and Local Storage Capacity Projections by Media and Entertainment Market (Petabytes).....	210
Table 48. Annual New Total Networked Storage Capacity Projections by Media and Entertainment Market (Petabytes).....	211
Table 49. Annual New On-Line Networked Storage Capacity Projections by Media and Entertainment Market (Petabytes).....	212
Table 50. Annual New Near-Line Networked Storage Capacity Projections by Media and Entertainment Market (Petabytes).....	213
Table 51. Annual New Object Storage Capacity Projections by Media and Entertainment Market (Petabytes).....	214
Table 52. Annual New Cloud Storage Capacity Projections by Media and Entertainment Market (Petabytes).....	214
Table 53. Total Entertainment and Media Storage Revenue Estimate (\$M).....	218
Table 54. Direct Attached and Local Storage Entertainment and Media Storage Revenue Estimate (\$M)	219
Table 55. Total Network Storage Entertainment and Media Storage Revenue Estimate (\$M)	220
Table 56. On-Line Network Storage Entertainment and Media Storage Revenue Estimate (\$M).....	221

Table 57. Near-Line Network Storage Entertainment and Media Storage Revenue Estimate (\$M).....	222
Table 58. Object Storage Entertainment and Media Storage Revenue Estimate (\$M).....	223
Table 59. Off-Line Storage Entertainment and Media Storage Revenue Estimate (\$M).....	224
Table 60. Media Unit Storage Capacity and Price Assumptions.....	235
Table 61. Detailed Annual New Media Unit Breakdown by Application.....	237
Table 62. Annual New Media Unit Summary.....	240

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Executive Summary

This report is the nineteenth report on data storage and emerging applications and the seventeenth report on data storage in the entertainment and media market published by Coughlin Associates.

Data storage is a key element in the digital transformation of content creation, editing, distribution and reception. Data capacity and communication speed increases, changing form factors, lowered product prices and the growing familiarity with digital editing, digital intermediates and various forms of digital distribution are key components in the continued growth and development of entertainment.

Because of the large file sizes required for high resolution and multi-camera images there is increasing demand for high capacity storage devices as well as high performance storage. The entire content value chain of content creation, editing, archiving, distribution as well as consumer electronics content reception devices, provide an accelerating feed-

forward mechanism. This drives growth in data storage for all entertainment content applications.

For many archiving and distribution applications where content is relatively static, low cost/high capacity SATA HDD storage, optical discs and tape-based storage libraries will predominate, with some flash memory used for caching and metadata. Note also that many active archive systems may also be hard disk drive based and will often include magnetic tape and SSDs for caching. Hard disk drives as well as SSDs are also used in high performance storage applications where storage cost factors must be balanced with performance requirements.

For applications requiring rugged field use or fast playback response, flash memory either as cards or solid-state drives (SSDs) are now standard fare.

Due to input from industry groups, SMPTE, HPA, EBU (as well as media and entertainment publications and websites) survey results and discussions with industry end users and equipment providers we have continued to adjust many of our models for current storage estimates as well as future growth in 2021 and beyond. In addition, we have expanded the continued impact of solid-state storage in our projections based upon expected lower flash memory storage costs and also increased our cloud and object storage projections, which has been accelerated by the COVID-19 pandemic.

We list some key points of the report in the following list.

Key Points

- The Covid-19 pandemic in 2020-2021 had a big impact on content creation during 2020 and 2021, except for broadcast acquisition
- Spending for digital cinema in 2021 and during the next few years will be impacted by the pandemic
- Creation, Distribution & Conversion of video content creates a huge demand driver for storage device and systems manufacturers
- As image resolution increases and as stereoscopic VR video becomes more common, storage requirements explode
- The development of 4K TV and other high-resolution venues in the home and in mobile devices will drive the demand for digital content (especially enabled by high HEVC (H.265) and VVC (H.266) compression and even greater standards for compression to enable 8K and higher resolution and frame rate workflows.
- HDD areal density increases are increasing with the introduction of energy assisted HDDs starting in 2021. However, flash memory price has continued to decline. This, plus the growth in higher resolution and higher frame rate content, is causing more applications to use flash memory
- Activity to create capture and display devices for 8K X 4K content is occurring with planned implementation in common media systems in this decade
- Active archiving will drive increased use of HDD storage for “archiving” applications, supplementing tape for long term archives

- Flash memory dominates cameras and is finding wider use in post-production and content distribution systems
- From 2020 to 2026 entertainment and media digital storage TAM (without archiving and preservation) will increase by about 2.5 X from \$6.3B to \$15.9B
- The growth in storage capacities will result in a total media and entertainment storage revenue growth of about 2.1 X between 2020 and 2026 (from \$9.1B to \$19.2B)
- Overall annual storage capacity demand for non-archival applications is expected to increase over the period from 2020 to 2026 by 8.8 X from 18.7EB to 163EB
- Between 2020 and 2026 we expect about a 3.2 X increase in the required digital storage capacity used in the entertainment industry and about a 4.4 X increase in storage capacity shipped per year (from about 69EB to 304EB)
- In 2020 content distribution is estimate at 44% of total storage revenue followed by archiving and preservation at 32%, post-production at 5% (due to the impact of COVID) and content acquisition at 19%.
- In 2026 the projected revenue distribution is 37% content distribution, 23% post production, 23% content acquisition and 17% archiving and preservation.
- By 2026 we expect about 59% of archived content to be in near-line and object storage, up from 50% in 2020
- In 2020 we estimate that about 72% of the total storage media capacity shipped for all the digital entertainment content segments was in HDDs with digital tape at about 21%, about 3% optical discs and flash at about 4%
- By 2026 tape capacity shipment share has been reduced to about 12%, HDDs shipped capacity is about 76%, optical disc capacity is down to about 0.3% and flash capacity percentage is at about 11%
- Media revenue is expected to increase about 1.8 X from 2020 to 2026 (\$1.eB to \$2.3B).
- Although no longer the biggest driver of digital storage growth, the digital conversion of film, video tape and other analog formats and its long-term digital preservation is still a significant driver for archived content
- Over 141 Exabytes of new digital storage will be used for digital archiving and content conversion and preservation by 2026
- Storage in remote “clouds” is playing an important role in enabling collaborative workflows, content distribution and in archiving
- Overall cloud storage capacity for media and entertainment is expected to grow over 13.8 X between 2020 and 2026 (10.1EB to 140EB)
- Overall object storage capacity for media and entertainment is expected to grow about 5.6 X between 2020 and 2026 (17.1EB to 96.5EB)
- Cloud storage revenue will be about \$3.3B by 2026
- By our estimates, professional media and entertainment storage capacity represents about 4.9% of total shipped storage capacity in 2020.
- In 2020 professional media and entertainment consumed about 15% of all tape capacity shipments, 6% of all hard disk drive shipments and 2% of all

flash memory shipments. We estimate that media and entertainment spending was about 10% of total storage revenue in 2020.

- Digital cinema will revive after the COVID pandemic, although we believe unless it moves to more immersive experiences it will not grow like in the past
- Silver halide film is in serious decline and only used in some special projects.
- AXF and other new standards may help format obsolescence
- Several petabytes of storage can be required for a complete stereoscopic digital movie production at 4K resolution and there is increasing production work at 8K or higher
- By the next decade total video captured for a high-end digital production could be hundreds of PB, approaching 1 Exabyte
- Movement to IP based workflows will reduce total costs for content management, including storage
- Non-linear editing requires high performance storage devices. Over the forecast period lower network storage costs and higher performing low cost storage networks will result in faster growth of network storage than direct attached and local storage
- ATA HDD arrays have become the dominant storage for readily retrievable fixed content storage, but flash memory is growing for this use as costs decline (NVMe using the PCIe bus is now the dominate flash interface)
- Magnetic tape will remain as an archival media although use in other applications is in decline, particularly content capture
- Flash memory is the clear majority storage media in professional video cameras with survey results showing about 59% utilization in the 2021 survey
- The continued need to storage data for higher performance and high capacity workflows are driving strong storage growth in the projection period—assuming no great negative economic trends.

The data presented in this report is subject to change as the content storage market develops. We have additional information that we have gathered in addition to that included in this published report. We will continue to monitor and develop our models of this market as time goes on. We would be glad to work with customers on specialized presentations or reports and in general to conduct research to answer specific questions on a project or ongoing basis.