

D.I.S. Consulting

C O R P O R A T I O N

Publishing syndicated market research surveys in media technology markets since 1982

Professional Displays World™2010

Publication Date: January 2011

General Overview:

Professional Displays World tm 2010 is the first GLOBAL survey of video display products in use among professionals and is the most comprehensive syndicated market research survey ever conducted regarding these products. A previous research effort last year, called *Video Displays World™2009* included Commercial markets and Digital Signage. This version does not. Instead it broadens the study of purely professional and broadcast monitor uses, both flat panels and the original CRTs (that are rapidly being replaced).

Video Display Products Covered:

1. CRTs (being retired)
2. LCD Flat Panels
3. Plasma Flat Panels

Segments Covered:

1. TV and Cable Stations,
2. Production and Post-production
3. Mobile
4. Institutional (Religious, Government, Corporate, Medical and Educational Facilities)
5. Independent Video and Film
6. Event Video
7. Rental Houses

The survey, in terms of product and market coverage, LIMITS ANSWERS TO PURELY PROFESSIONAL MODELS and is far reaching and overall reporting detail focuses on those market segments of interest to the client, including installed base (number and type of video displays owned), actual 2010 and anticipated 2011 purchases, and a 5-year forecast of all sales. We publish a comprehensive report, showing all results by type, sub-market and world regions surveyed. End-user data will be collected by phone, and augmented by traditional direct mail hard copy questionnaires and/or completed online. The data will be sorted and warehoused in an online database and analyzed. There is even a 'leaders' summary' with key findings and an easy-to-read 'bird-eye view' made especially for senior executives.

Geographical Regions:

The report covers the U.S.A., Europe, The Middle East, and Africa, Asia-Pacific and the Americas— closely following manufacturer sales territories shown with an estimated total responses of 1,800, to the trends and products questions of the study from which projections are made.

1) USA 2) Europe 3) Middle East, Africa 4) Asia-Pacific 5) The Americas (Central and South America)

Screen Size ranges:

- 1) 0-18", 2) 19-25", 3) 26-28", 4) 29-33" 5) 34-43", 6) 44-59", 7) 60-65", 8) 66-83" and 9) 84"+ (see final breakouts in the on-line questionnaire)

Key Issues:

The key focus will be on video displays including: CRTs and LCD & Plasma Flat Panels in use among professionals, Maximum screen size (measured diagonally), Type of Application, Troublesome problems such as lag, low resolution, other systems displays integrate with, # of audio channels, most sought after features, installed base, past 12 months purchases as well a future 2011 and beyond planned purchases.

Deliverables:

The sponsors receive a CD-ROM copy of the survey results for those regions they have sponsored and/or globally if they have purchased the survey in its entirety. Our new reporting style features more analysis, more salient section summaries.

Sample Frame and Lists Sourced:

The *Video Displays World™ 2010* project used a list of the television stations and production or post facilities from IBC, NAB, Broadcast Asia, *Broadcasting & Cable* both a magazine and a directory by Reed Elsevier Business Lists, a division of Cahner's Direct Marketing Services for cable. That culling targets chief engineers or the equivalent senior technology executives at each U. S. TV and Cable Station.

Names of individuals from Production and Post-production facilities 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 used. Institutions are compiled via O'Dwyers Guide and other sources. The RTNDA list of news directors was also sourced to improve NEWS/ENG use coverage. Most audio listings are sourced from AES, Cedia, SPARS and APRS.

Lists by Region and Marketplace				
Markets	USA	EMEA	ASIA	AMERICAS
Broadcast/Cable/Sat	NAB/SMPTE Broadcasting & Cable Ybk RTNDA	NAB/IBC/Kemps World Guide to Film & TV RTNDA	BA/IBC/NAB ABU/SMPTE World Guide	NAB/IBC World Guide Film & TV Set/Caper
Production/Post-Prod and Mobile	NAB/SMPTE O'Dwyers	IBC/Kemps Compass	BA/IBC/NAB Kemps, etc.	NAB/IBC Set/Caper
Institutional	NAB/SMPTE Yellow Pages	NAB/IBC/Kemps Sonovision, etc.	BA/IBC/NAB Kemps/China & Japan guide	NAB/IBC guides SET/Caper
Independent/Event/ Rental	NAB/SMPTE O'Dwyers	IBC/Kemps Compass	BA/IBC/NAB Kemps, BIRTV, InterBEE	NAB/IBC Set/Caper

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.

The Market and Minimum Response Level Sought: 1,800 Respondents

This tracking survey covers five regions:

1. USA 2. Europe 3. M-E Africa 4. Asia-Pacific 5. The Americas

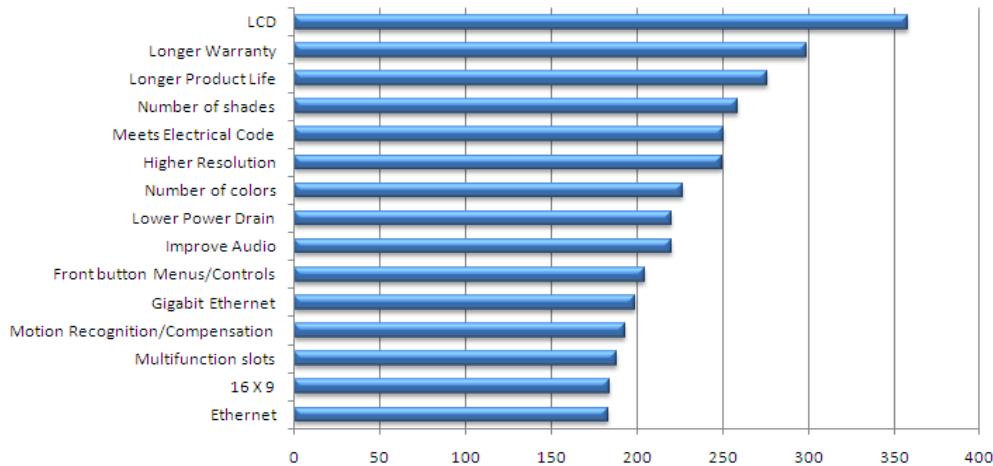
Top Ranked Firms Targeted:

Market Segment & Regional Universe					Responses Sought**
Vertical Market	United States	Europe	Asia	Americas	
Broadcast & Cable	110	90	80	80	360
Production/Post-Mobile	110	90	80	80	360
Institutional Facilities	110	90	80	80	360
Independent/Event/Rental	110	90	80	80	360
Mobile	110	90	80	80	360
Total User Markets	550	450	400	400	1,800

Naturally, we seek to target each major network, large stations and facilities and MSOs, worldwide. So, we cull 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 gear can be found.



When purchasing (or leasing) your next Flat Panel Display Monitor, which of the following features or factors would you most desire? ALL MARKETS



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Format of Reporting Data:

Summary tables, color Excel charts, graphs and the written summary section show both quantitative and qualitative results in each section or product category. Tables show full corporate results and regional information for all survey questions and the entire research report is delivered on a CD Rom. Three types of reports are available:

1. PRODUCT REPORT

- Professional Video Displays: CRT's, LCD & Plasma Flat Panels
- Unit and market value data
- Maximum Screen Size (Measured Diagonally) for all size ranges
- Troublesome Problems such as Lag or Burn In
- Brand and leading model market shares
- Installed base (owned)
- Purchases in the past 12 months and value (2010)
- Plans to buy in the next 12 months and value (2011)
- Prospects for out years (5-year forecasts)
- Custom reports available (cross-tabulation)

2. GENERAL MARKETING & MEDIA

- Trends relating to the overall state-of-the industry
- Equipment budgets and buying habits
- Demographics
- New Technologies, applications and trends
- Applications planned/used
- Trade magazine readership and trade show attendance and preference

3. BRAND IMAGE

- Brand image ratings for pre-fielded (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
 - Price
 - Quality
- Ratings compared by brand, and by each factor, as well as by overall composite brand image. All charts also show the industry average

Methodology:

As in previous years, D.I.S. has consulted with all of its front-end sponsors as well as with those companies not sponsoring the survey, in the effort to be as comprehensive reading brands and models as well as salient and accurate technology trends gathering. Clients were extremely helpful in aiding in the design of the questionnaire and in recommending improvements to the process.

The transition in 2004 from the exclusive use of hard copy direct mail to our new method began as a combination of Direct mail collection grouped with the CATI houses and the on-line website (both using a synchronous questionnaire) where we collected the responses and data entered all of them for tabulation purposes. D.I.S. Consulting Corporation's new software and structure permits nearly endless cross-tabulations or correlations of different aspects of the questionnaire (consult with us if you want a special cross-tabulation done).

We invited professionals to the website – enrolled them – and collected their individual product data using telephone interviewing CATI methods where the responses got entered as they were gathered into the

relational on-line database. Up to date mailing lists were used including the freshest (international) NAB attendee list, the similar IBC list (also international) as well as numerous other industry sourced mailing lists like Kempis International. All of them were also merged together to form a phone list for domestic and international calls. In addition to the in-house CATI, D.I.S. Consulting Corporation also used CADI houses – calling centers -- in South America, Asia and Europe to gather the international responses.

Incentives:

Survey respondents will receive a copy of the [2010 Broadcasting, Audio & Video Global Industry Trends Report](#) D.I.S. Publishes in Conjunction with the NAB Show annually, as part of the strategic partnership. The 123-page book features a global trends overview by Douglas I. Sheer, CEO of D.I.S., plus regional and industry comment reports by contributors Phil Rutter, Adrian Scott, David Mercer, Francisco Gutierrez and Kevan Dauphanee. Subjects include: 3D, 3-Gig, HD and On-line alternatives to TV distribution.



Marketplace reports cover product or market genres such as audio/radio, news, servers, storage, camcorders, encoding, displays, sports, automation, editing, mobile/OB, graphics and accessories. Comments from industry leaders also appear throughout the book.

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 tm is used for the spreadsheets (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 of all the data.

Pricing and Terms:

Pricing is based on the number of regions and product categories desired. Each product category purchase includes the general reports. Brand image reports are included only with a purchase of three or more regions and/or product category reports. Pre-publication sponsor prices are lower than post prices.

<i>Professional Displays World tm 2010</i>	<i>* Pre-Publication Prices</i>	<i>Post-Publication Prices</i>
<i>The Second Global Market Survey</i>	<i>(-20% Discounted)</i>	<i>Orders After Publication</i>
Report Type*		
<small>*Purchases which occur approximately three months before publication, Offers a 20% discount off of post-publication price</small>		
<i>Pre-Publication*</i>	\$9,950 USD	
<i>Post-Publication</i>	\$12,050 USD	
Regional Reports		
<input type="checkbox"/> 1 region	\$5,950	\$7,140
<input type="checkbox"/> 2 regions	\$6,961	\$8,353
<input type="checkbox"/> 3 regions	\$8,144	\$9,772
<input type="checkbox"/> ALL 4 regions	\$9,950	\$12,050
(Global FULL Sponsorship)	FULL GLOBAL	FULL GLOBAL
<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/product genres

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