



MARKET RESEARCH PROGRAM FOR MANUFACTURERS

in cooperation with



What is the ESTA Market Research Program?

In response to industry requests ESTA established, in cooperation with APIAS, CITT, PLASA, USITT and VPLT, a global market research program. The purpose of this program is to provide manufacturers around the world with accurate market information which they can use for business planning, product development, charting trends, obtaining financing, and valuing their business. Market data is collected and reported quarterly on specific product categories directly from industry manufacturers. This is the only study of its kind in the entertainment technology industry and participation is open to manufacturers around the world. Only participating companies have access to the reports.

What information is contained in the report?

The study reports market size for specific product categories in both wholesale dollars and, where applicable, units, broken down by geographic area. The initial product categories fall under the areas of lighting and atmospheric effects. The geographic breakdown consists of the United States, North/Central America, South America, Europe, Middle East/Africa, and Asia/Pacific Rim. The report also charts growth by product category against the same quarter in the prior year and on an annual basis, and indicates what percentage of an overall product category a specific subcategory represents.

Why should we be interested in market research?

No matter where in the world your business is located one thing is becoming certain - the entertainment industry marketplace has become global. With technology making it easier for competitors to enter new markets it is more important than ever for businesses to understand the size of the market for their products and what share of that market is theirs. Some companies are still making guesses about the answers to those two questions. They may be educated guesses but they are still just guesses while hard facts are now available.

Business owners are under more pressure than ever before – whether you are arranging sources of financing to fund new growth, seeking government assistance to export products, developing a marketing and sales plan for new territories and new products, or valuing your business for sale or retirement. For all of these activities, knowing how big your market is, where it is growing or shrinking, and what your share really is, is crucial to running a successful company.

The information generated by the ESTA Market Research Program will allow you to accurately track your company's market share, compare sales trends for specific product segments, and identify sales patterns of products by geographic regions worldwide.

Is the information we provide kept confidential?

Absolutely. ESTA has engaged an experienced accounting firm to receive and compile all data and to prepare and mail the report. Data is kept strictly confidential, and the final report contains no reference to or identifier for any individual company. A general list of participating companies accompanies the report. At no time will the accounting firm provide access to the data to any outside company, individual, or association. The accounting firm follows strict confidentiality procedures that have been mandated by ESTA and destroys all raw data after 120 days.

Who can participate?

Any company in our industry worldwide can participate who meets the following criteria:

1. They are the manufacturer of a product that is included in the survey
- or
2. They are the exclusive or primary entry point of a product into the marketplace for a manufacturer that does not wish to participate in the survey

How do we sign up to participate?

Companies may sign up to participate in the 2008 report at any time prior to December 31, 2007. No company may join the report part way through the year as this would skew the numbers and the growth calculations for the year. Companies wishing to participate in the survey must:

1. Make a two year signed commitment to provide data on a quarterly basis.
2. Pay for the first year subscription in advance. The fee for the survey is based on the size of your company (as with the ESTA dues structure, this is based on the number of employees).
3. Sign a nondisclosure agreement indicating you will not release the information contained in the survey to anyone outside of your company and its professional advisors, financial representatives, and prospective investors or purchasers.
4. Complete a form providing ESTA with full contact information including email address, the currency in which your numbers will be reported, and the product categories you will be reporting.

What is the procedure for the quarterly reports?

1. The accounting firm will directly preassign a code to you under which your data should be submitted. No company name should be attached to the data.
2. ESTA will email the survey form to you two weeks prior to the end of the quarter. (The survey form is a concise Excel spreadsheet.)
3. The completed form must be emailed to the accounting firm within 30 days after the end of the each quarter.
4. The accounting firm enters the data, provides any necessary currency conversions and calculates percentages.
5. The accounting firm emails the completed report to you within 60 days of the end of each quarter, based on final receipt of all data.
6. The accounting firm destroys all raw data 120 days after the reports have been mailed.

What if we miss filing a report?

Because ongoing participation is crucial to the success of the program, companies who miss filing reports will be subject to sanctions.

What if our product category is not included in the list of products?

You may petition ESTA to add your product category to the survey. You will be asked to assist in identifying and recruiting other manufacturers in your category. At least three manufacturers in each category must participate in order for the survey to be undertaken.

What does the program cost?

The annual subscription fee is based on the number of full time or equivalent full time employees, in all locations, including the owner(s). Only companies that contribute data will be allowed to subscribe to the report.

# of employees	ESTA Member	Related* Assn. Mem.	Non Member
1 - 6	\$550	\$825	\$1,100
7 - 25	\$825	\$1,100	\$2,200
26 - 50	\$1,100	\$2,200	\$3,300
51 - 100	\$2,200	\$3,300	\$4,400
Over 100	\$3,300	\$4,400	\$5,500

* Applies to members of APIAS, CITT, PLASA, USITT and VPLT

Product Categories

(Price points represent U.S. dollar standard dealer / average wholesale price)

LIGHTING

Moving Lights

Below \$1,000

Spot

Wash

\$1,000 - \$2,500

Spot

Wash

Above \$2,500

Spot

Wash

Incandescent

Spot

Wash

Fixed Luminaires

Discharge Source

ER / Profile

Incandescent Source

ER / Profile

Theatrical Fresnel / PC

TV/Film Fresnel

PAR

Borders & Cycs

Other Luminaires

Fixed Luminaire Accessories

Followspots

Incandescent

Xenon / Metal Halide

Lamps

Halogen

Single Ended

Double Ended

PAR

Metal Halide

Single Ended

Double Ended

Dimmers

Portable / Distributed

Installed

Rack Mount

Control & Networking

Theatrical Control

Under \$2,500

\$2,500 to \$5,000

\$5,001 to \$7,500

\$7,501 to \$15,000

Over \$15,000

Architectural Control

Console Accessories

Data Distribution Products

DMX512 Based

Ethernet Based

DMX512 Interface Products

DMX512 Test Equipment

Media Servers

Video Output, Combined

Software and Hardware

LEDs

ATMOSPHERIC EFFECTS

Fog Machines

Under \$500

\$500 - \$1,000

Over \$1,000

Haze Machines

\$1,000 and Under

Over \$1,000

Fog Fluid

Fog Accessories

GEOGRAPHIC BREAKDOWN

United States

North/Central America

South America

Europe

Middle East/Africa

Asia/Pacific Rim