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DESKTOP PUBLISHING SOFTWARE MARKET BACKGROUND

The market for personal computer-based publishing systems is one of the fastest-growing segments of the microcomputer industry. According to a recent report from Creative Strategies of Santa Clara, Calif., "Desktop publishing is no niche, but is instead the most pervasive personal computer application yet realized."

Other leading market research firms forecast significant growth for desktop publishing. Dataquest Inc. of San Jose, Calif., expects the sales of software and hardware for desktop publishing to grow from $236 million in 1986 to $1 billion by 1991. CAP International, Marshfield, Mass., has forecast a 40 percent annual growth rate for PC composition, interactive graphic packages, and laser printers.

About 40,000 units of desktop publishing software for microcomputers were shipped in 1985 according to Softsel. Dataquest estimates that in 1991, 850,000 desktop publishing packages will be running on personal computers used in business.

Aesthetics, Economics and Technology

The need for persuasive and cost-effective business communication is driving the growth of desktop publishing, along with advances in hardware and software technology.

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People in business deal daily with an ever-increasing amount of plans, reports, presentations and other printed matter. No longer is a well-written, neatly-typed letter enough. The sheer volume of hard-copy communication has increased the value of persuasive documents -- typeset or typeset-quality materials combining text and graphics, or including multiple type styles and sizes.

Before the advent of desktop publishing, the production of these documents was time-consuming and costly, requiring the talents of a graphic artist or designer and the use of outside typesetting houses and cut-and-paste methods.

Business publishing is a major expense. With 80 percent of printed material still being produced manually, American corporations typically spend from five to ten percent of their expenses on printed communication, according to various industry analysts.

The personal computer phenomenon has created a base of experienced PC users who regularly make presentations and write reports. While these users may not have specialized knowledge of graphic arts or typography, many of them desire greater control of how their documents are created and look, and want savings in both time and money as well.

Technology is meeting those requirements. Significant cost and time reductions are possible through the electronic creation, editing and layout of documents. Electronic publishing, first developed for expensive, larger minicomputer and mainframe systems, has migrated to the desktop with recent advances in personal computer technology.

Important hardware and software developments heralded the desktop publishing solution. These include the ongoing development, rapid acceptance and falling cost of electronic laser printers, the emergence of the Apple Macintosh computer and Adobe Systems' PostScript Page Description Language, and the advent of software products such as Aldus PageMaker for the Macintosh. The relationship between the Macintosh and desktop publishing was a major factor in introducing both the computer and the application to the corporate environment.

Today, desktop publishing is no longer limited to Macintosh users. Eleven million-plus users of the IBM PC standard are finding desktop publishing benefits available to them through the introduction of new

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PUBLISHING MARKET OVERVIEW

Professional Publishing
COST: $500,000-$1.5M

Corporate Publishing—COST: $100,000-$500,000

High-end products bring graphics technology down to DTP
Desktop Publishing—COST: $5,000-$20,000

Byline brings technology up

Word Processing—COST: Below $5,000

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hardware and software: high-resolution graphics monitors, sophisticated graphics microprocessors, higher-resolution and more-affordable scanning devices, add-on graphics cards — and an influx of page composition or desktop publishing software packages written for the IBM PC.

Blocks to Widespread Use

To date, several barriers have prevented the widespread acceptance of desktop publishing by users of the IBM standard.

High-end PC desktop publishing software packages, usually priced between $695 and $895, are very complex and best suited for designers and professionals well-versed in typography and graphic design. Unlike other popular applications, such as word processing and spreadsheets, learning to use these desktop publishing packages demands familiarity with the elements of good design as well as a major time investment in learning new software procedures. In many instances, this complex software creates the necessity for desktop publishing specialists within corporations, defeating the primary goal of bringing desktop publishing to the everyday business computer user.

Another contributing factor to the specialization of desktop publishing has been its lack of complete integration into the corporate office environment. For desktop publishing to enjoy widespread use, it requires the capability to easily integrate files from industry-standard applications software — word processing, spreadsheets and databases — into professional-quality documents. At the low end of the market (packages whose suggested retail prices are less than $150), products have made major compromises in features and capabilities.

Most PC desktop publishing software packages on the market today will require additional software and hardware — such as Microsoft Windows, Digital Research GEM or a mouse. The majority of cost- and time-conscious PC users do not want to adapt to using a mouse to run an applications program. They prefer to use software that provides the look, feel and performance they expect from DOS-based business productivity software.

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DESKTOP PUBLISHING MARKET

HIGH END:
Sophisticated
Costly
Requires specialized skills
Fits centralized approach

MIDDLE: Byline
PC Performance
Rich in productivity features
Familiar = Easy to learn
Fits decentralized approach
Integrates into today's office
Moderate in cost

LOW END:
Limited power, flexibility
Fits decentralized approach
Inexpensive, often non-WYSIWYG
Often difficult to use

The Ashton-Tate Solution: Byline

Ashton-Tate designed Byline to overcome barriers to acceptance currently in the marketplace. Rather than being targeted solely at graphic specialists, Byline (suggested retail price: $295) was designed as a desktop publishing tool for the broad spectrum of business professionals who use word processors and other applications software.

It gives these users a smooth upward migration path from PC-based word processing, rather than forcing them to learn commands and terminology inherited from high-end electronic publishing systems.

Byline has an easy-to-learn, familiar working environment for PC users. Byline is keyboard-oriented, requires no additional hardware other than 384KB of random access memory (RAM), and a CGA, Hercules, Hercules PLUS or EGA graphics card.

Byline has been designed to meet high performance specifications. It displays layout and editing changes on the screen as quickly and easily as a spreadsheet performs calculations.

Byline also responds to user demands for flexibility. It offers a full-featured text editor with advanced stylistic and table-formatting capabilities.

In addition, Byline imports and exports files to and from industry-standard word processors (such as MultiMate 3.3, MultiMate Advantage 3.6, MultiMate Advantage II, WordPerfect 4.1 and 4.2, WordStar 3.3 and 4.0, XyWrite II and XyWrite III) and directly imports files from industry-standard database application products (such as dBASE III PLUS and products that export a .DBF file format), spreadsheets (including Lotus 1-2-3), paint packages (such as PC Paintbrush and MacPaint) and all ASCII files.

Byline is also a productivity tool. The unique dBASE merge capability enables users to import dBASE III PLUS files into pre-styled forms for database publishing.

Backed by Ashton-Tate's full user support, marketing and distribution resources, Byline provides the most practical desktop publishing solution on the market today and extends the company leadership into a new, high-growth category of microcomputer applications software.

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