



# HDTV Owners

## The Prospects for High-Definition Media

### DEG Addendum



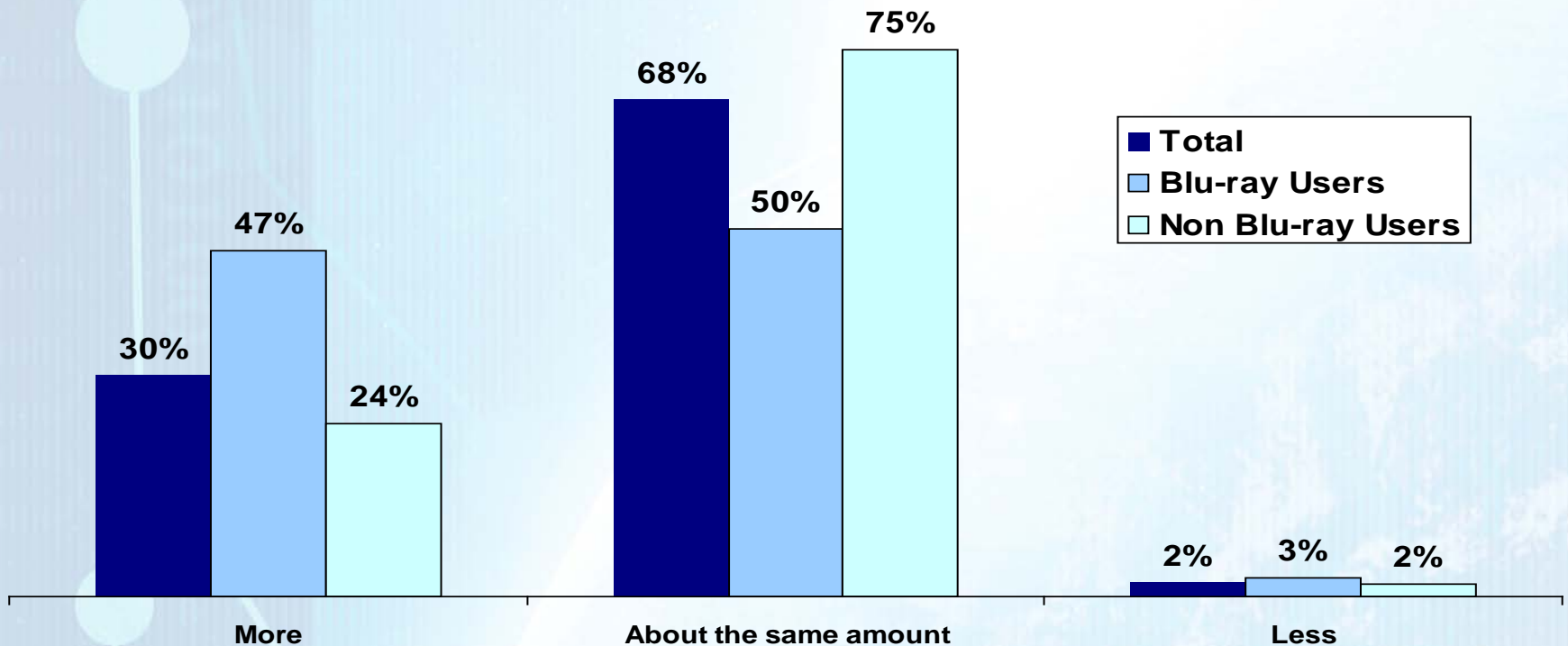
THE PROSPECTS FOR  
HIGH-DEFINITION MEDIA

# Research Data

# Programming & Content

## HDTV Owners Survey

### TV Viewing Momentum Since HDTV Purchase \*

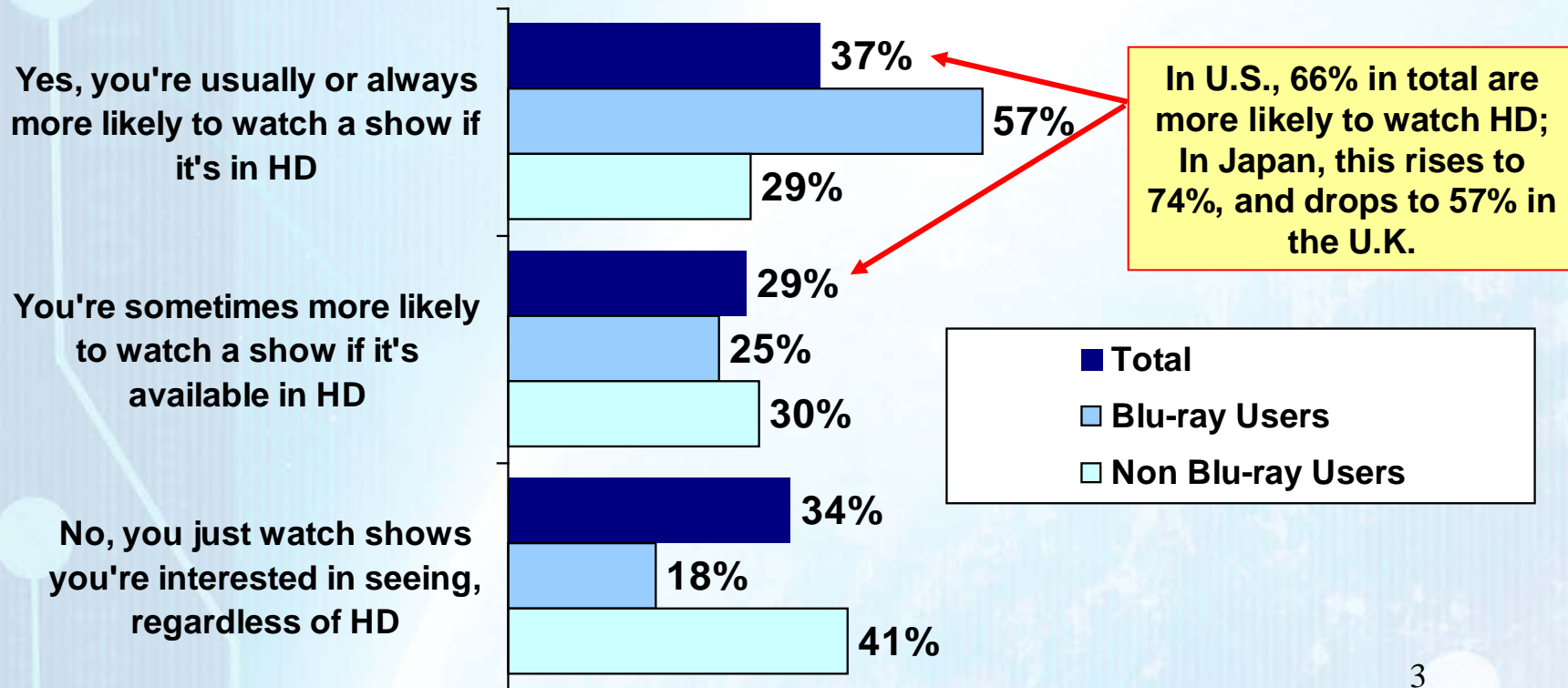


Among 18- to 24-year-olds, 53% watch more television since purchasing an HDTV.

# Programming & Content

## HDTV Owners Survey

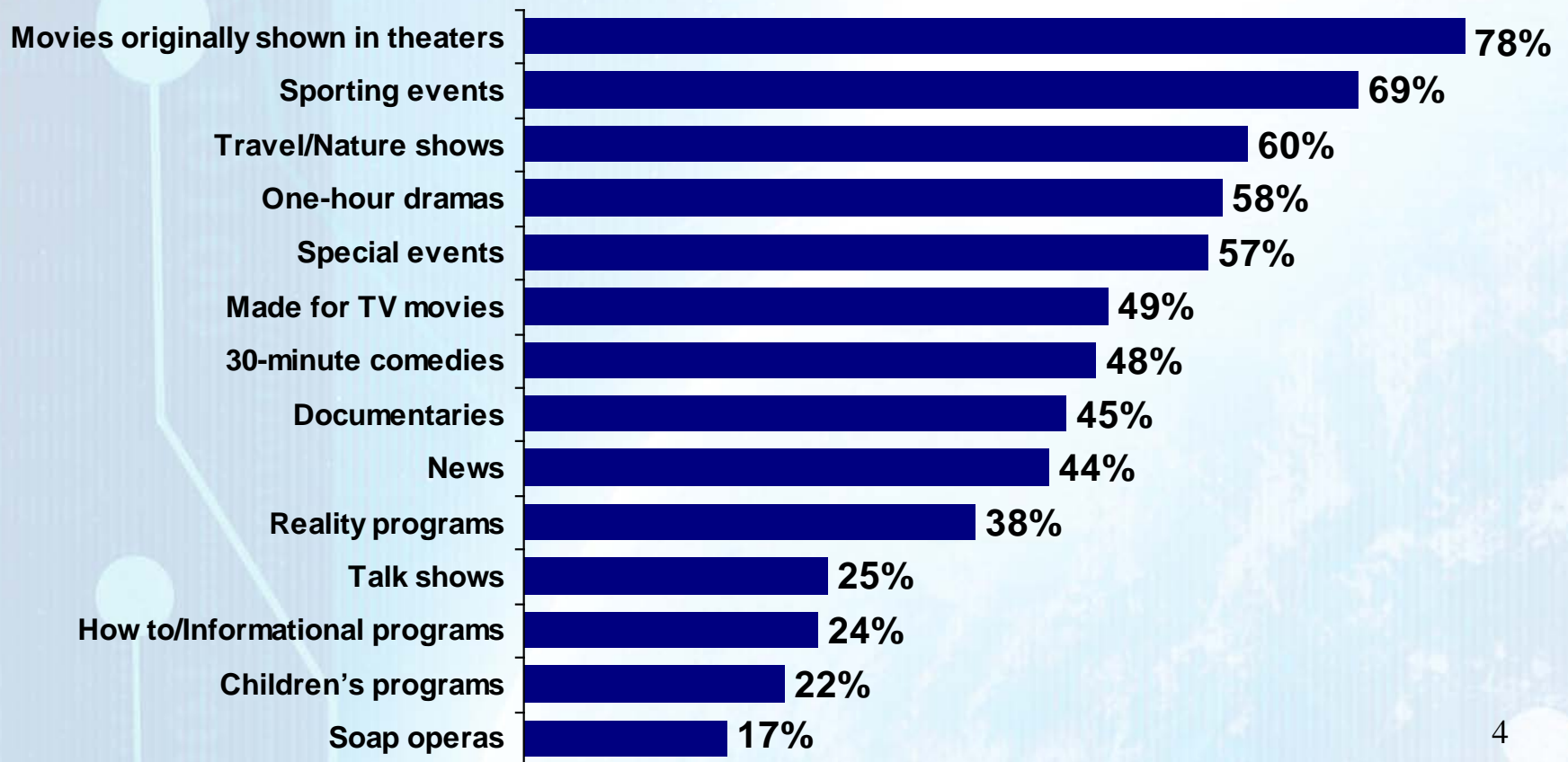
### Likelihood of Watching a Program Available in HD



# Programming & Content

## HDTV Owners Survey

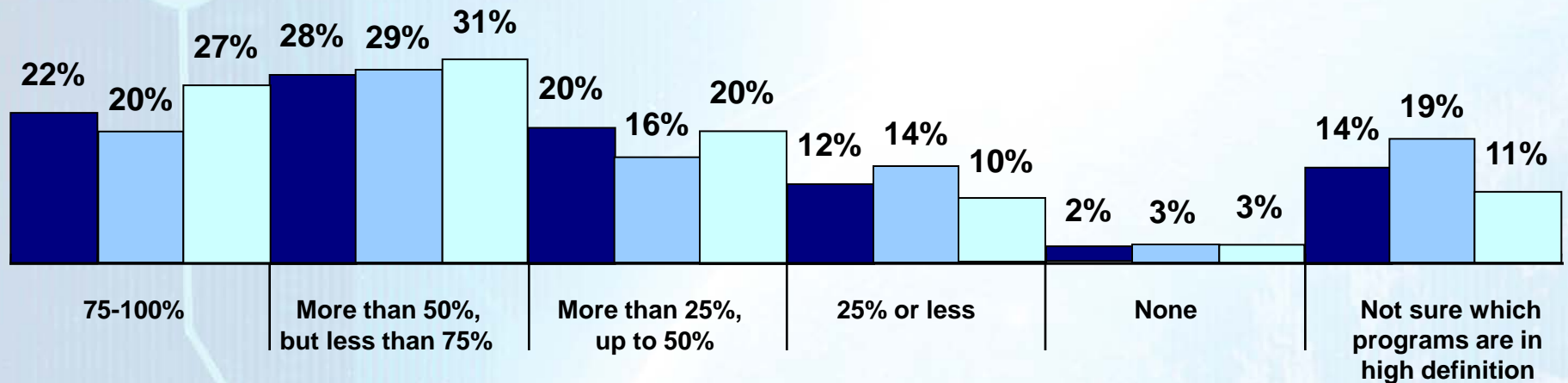
### Types of Shows More Likely to Watch When Available in HD



# HDTV and HD Programming

## Viewers Who Have HD Watch it Predominantly

### Percent of Programming Viewed in HD



**In the U.K., less than 25% watch the majority of their programming in HD.**

Based on households receiving HD programming

**Total**  
**Received HD Programming since 2008**  
**Received HD Programming since 2006 or earlier**

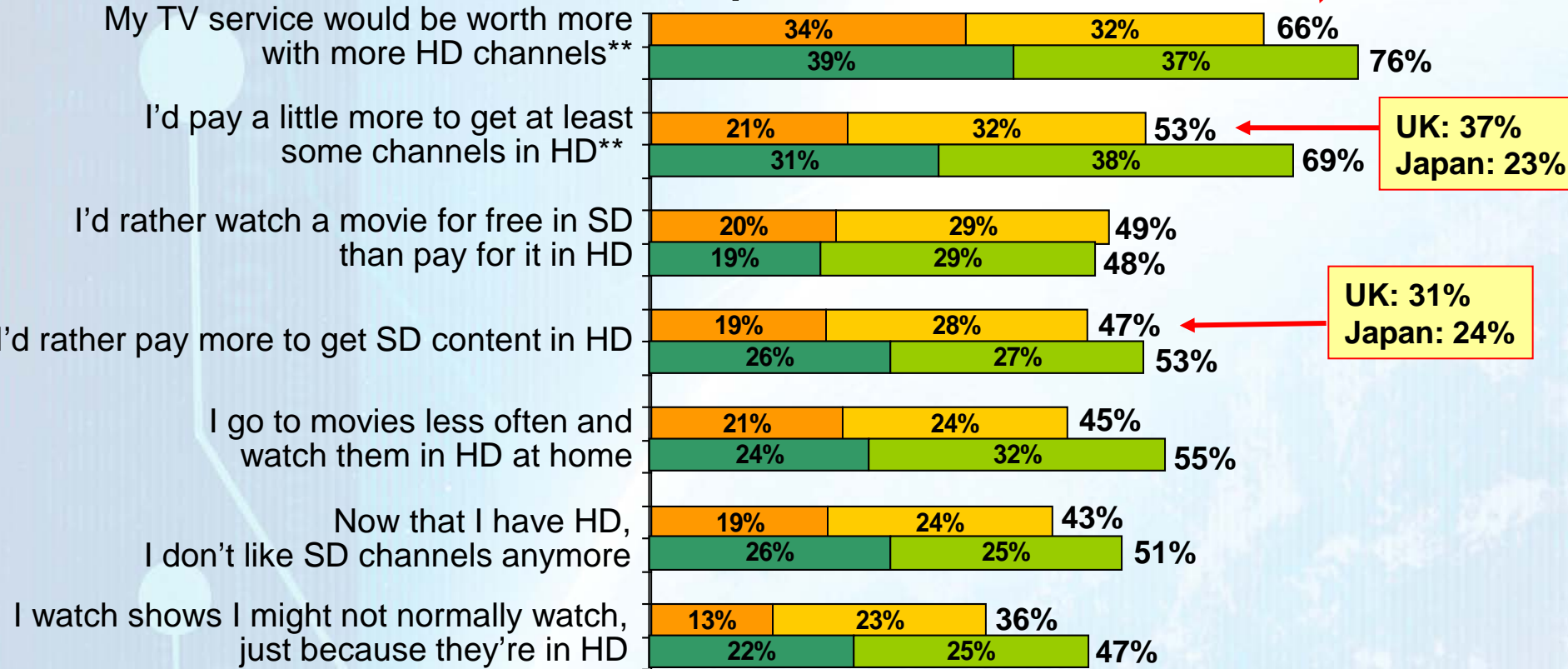




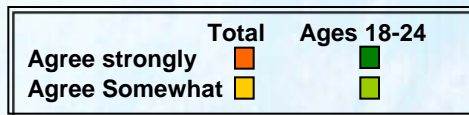
# HDTV and HD Programming

## HD Makes TV More Valuable and Changes Viewer Behavior

### HDTV Opinions\*



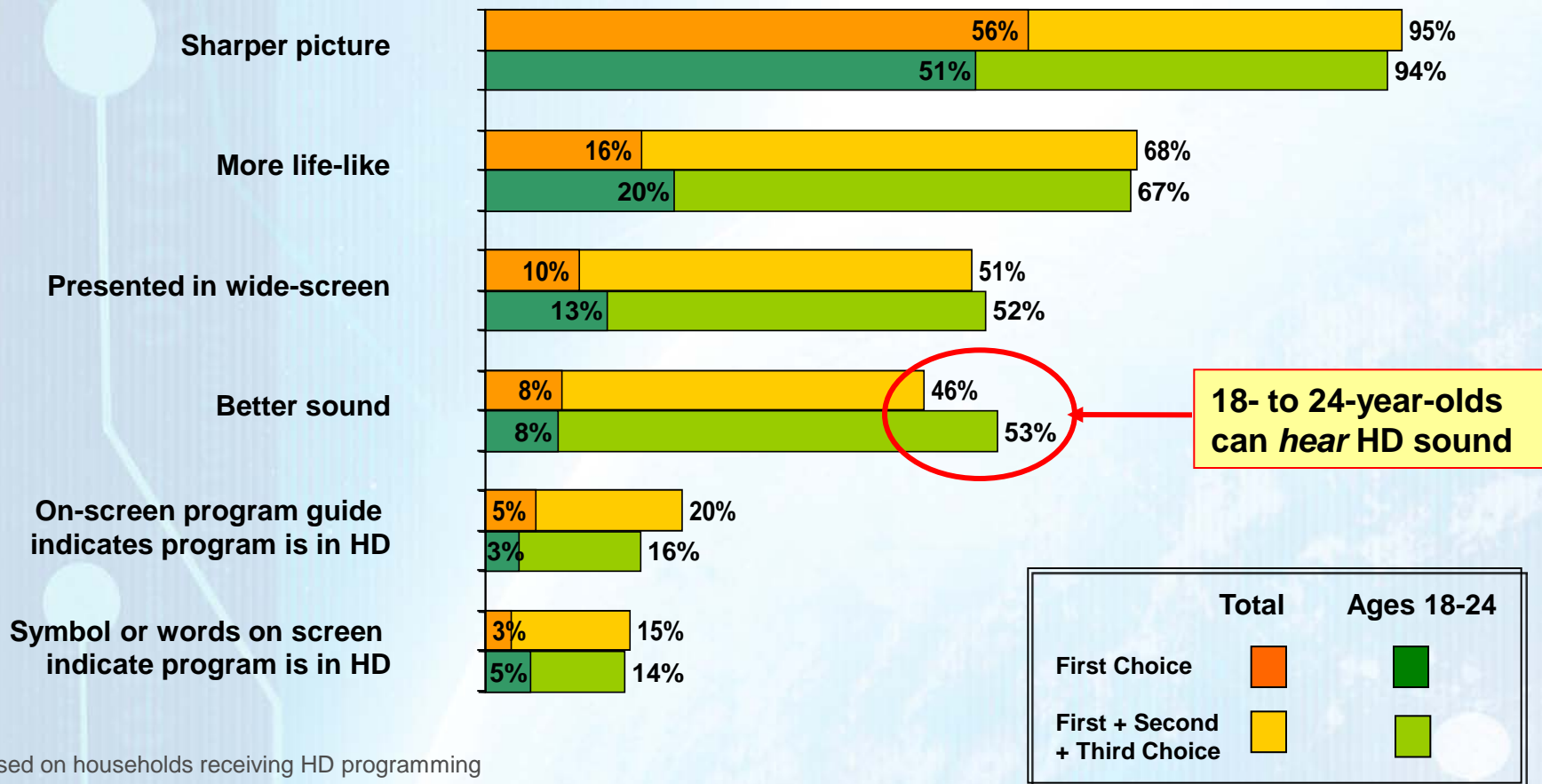
\* Based on households receiving HD programming  
\*\*Based on analog/digital cable, satellite or telco subscribers



# HDTV and HD Programming

## People Know HD When They See and Hear it

### Differences Between Standard TV and HDTV Programs





# HDTV and HD Programming

## HD Programming Beats Standard TV and Web Video

### HDTV Opinions\*

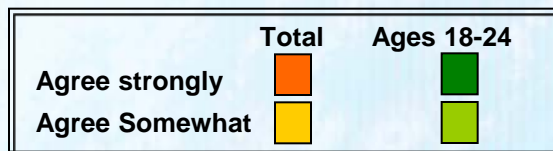
HD channels are “much clearer and more lifelike” than standard TV \*\*



HDTV is a “better overall entertainment experience” than internet video



HDTV is a “better overall entertainment experience” than a portable video device



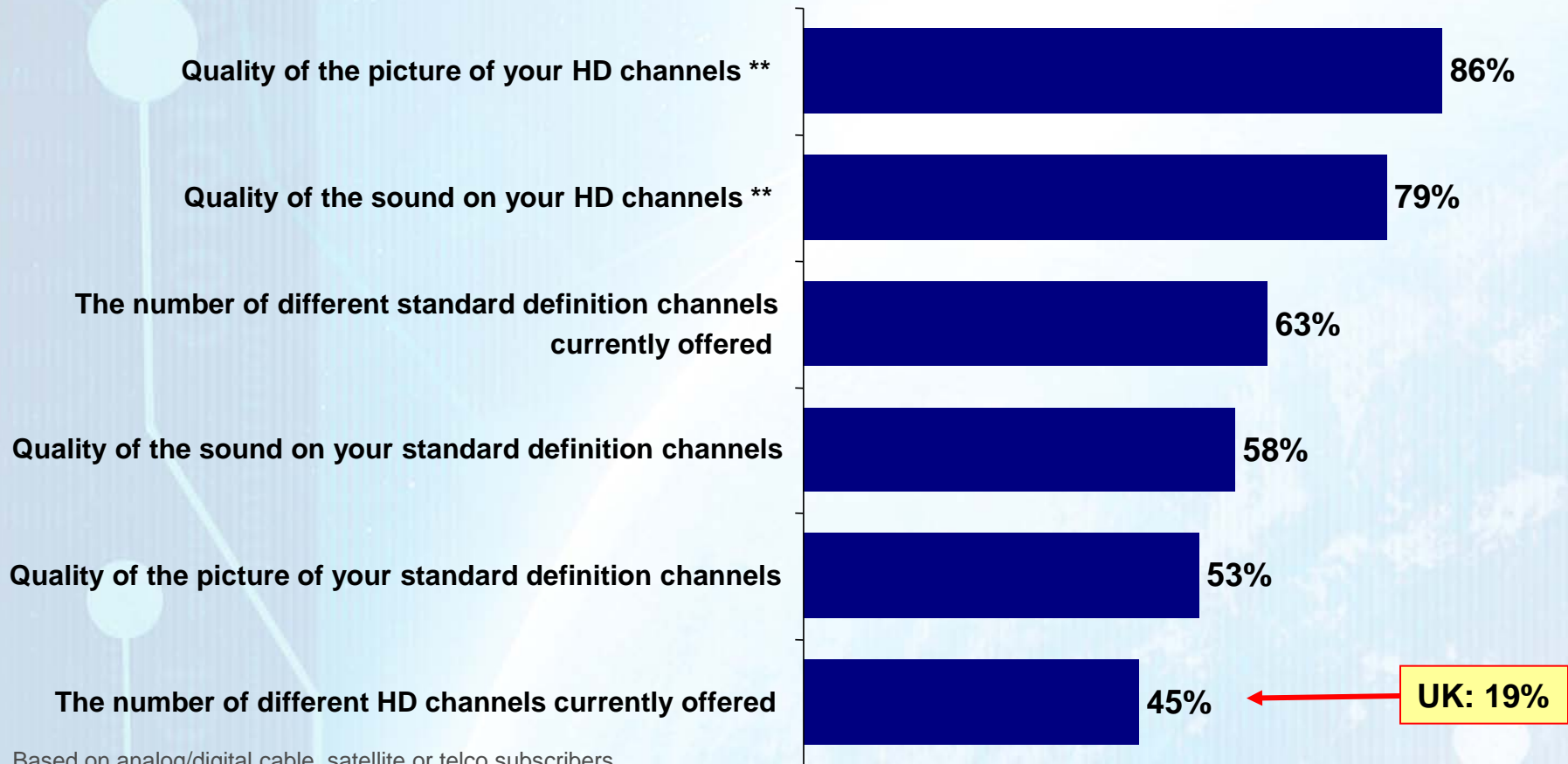
\* Based on households receiving HD programming

\*\* Based on analog/digital cable, satellite, or telco subscribers

# HDTV and HD Programming

## Viewers Love HD Pictures and Sound But Want More

### Satisfaction with Cable, Satellite or Telco\*



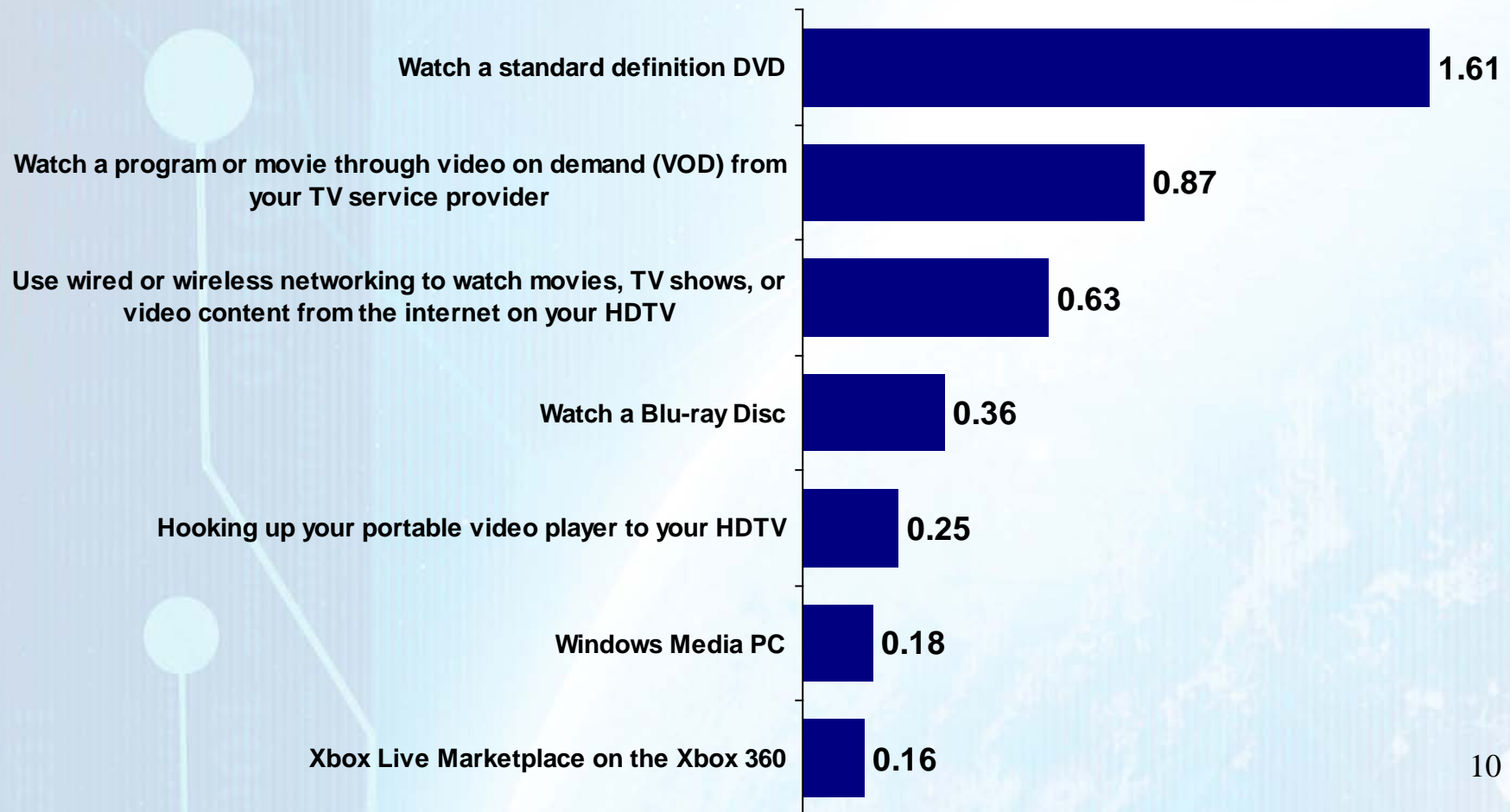
\* Based on analog/digital cable, satellite or telco subscribers

\*\* Based on Basic HD or Premium HD subscribers

# Programming & Content

## HDTV Owners Survey

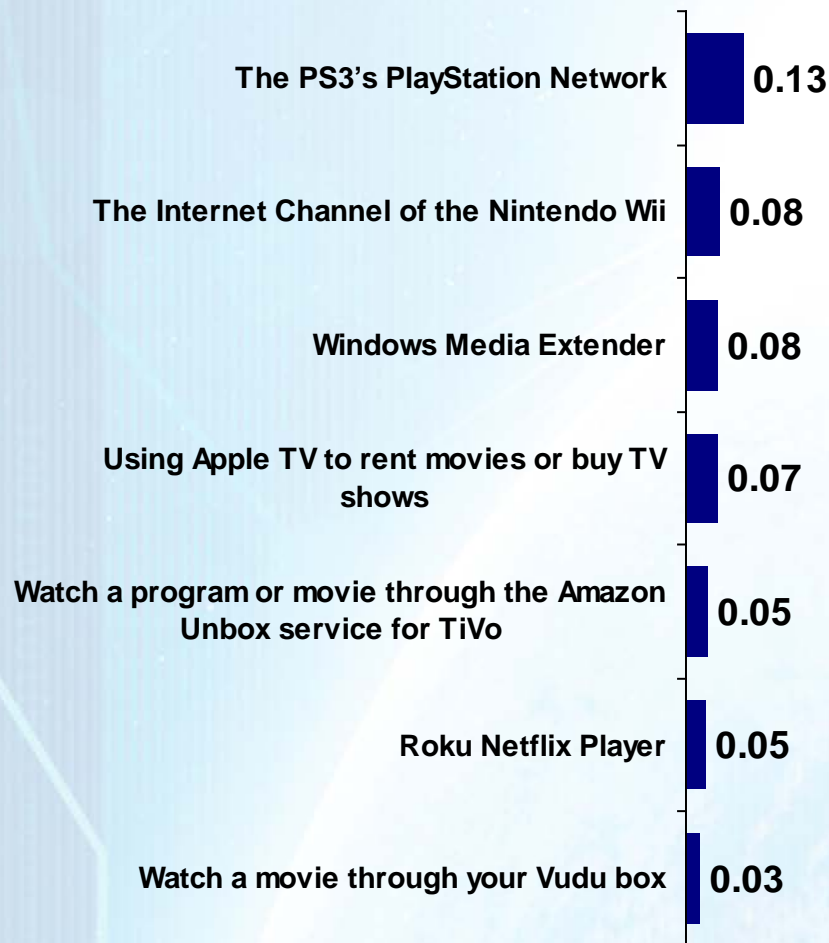
### Frequency of Watching HDTV Content (Ave. days/week)



# Programming & Content

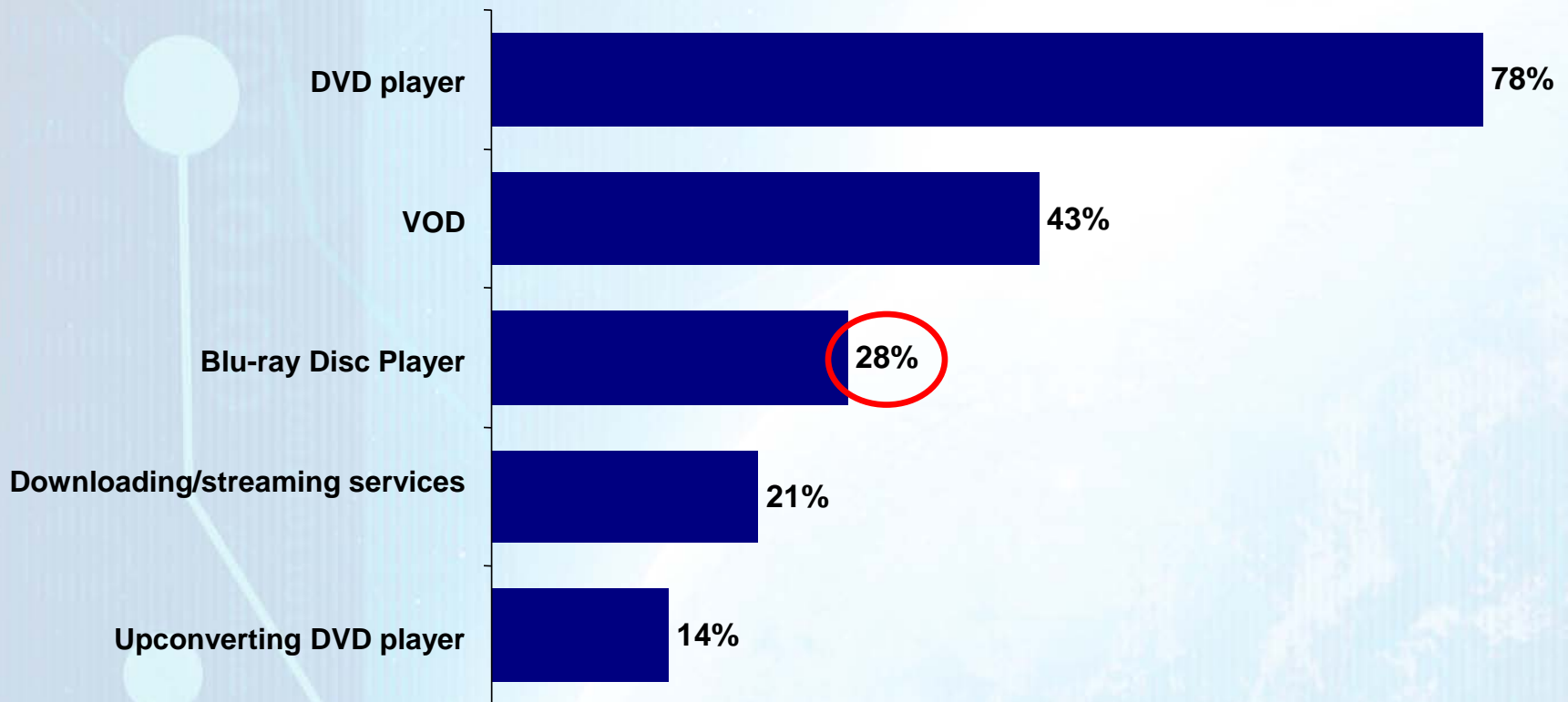
## HDTV Owners Survey

### Frequency of Watching HDTV Content (Ave. days/week) (cont'd)



# The HD Media Landscape

## Ownership/Usage with HDTV



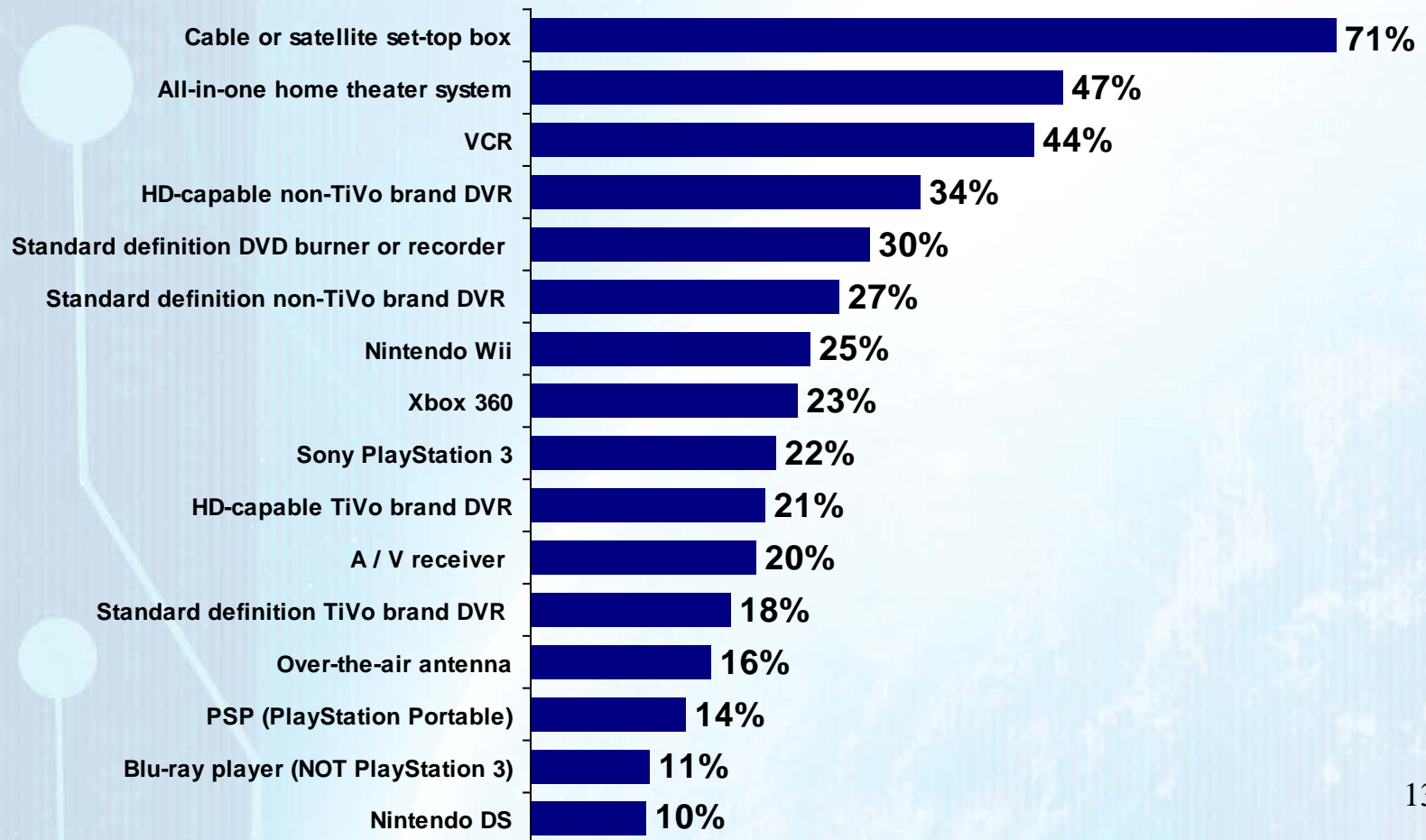
28% of HDTV Owners Already Own a BD Player



# The HD Media Landscape

## HDTV Owners Survey

### Monthly Usage With HDTV – Additional Criteria

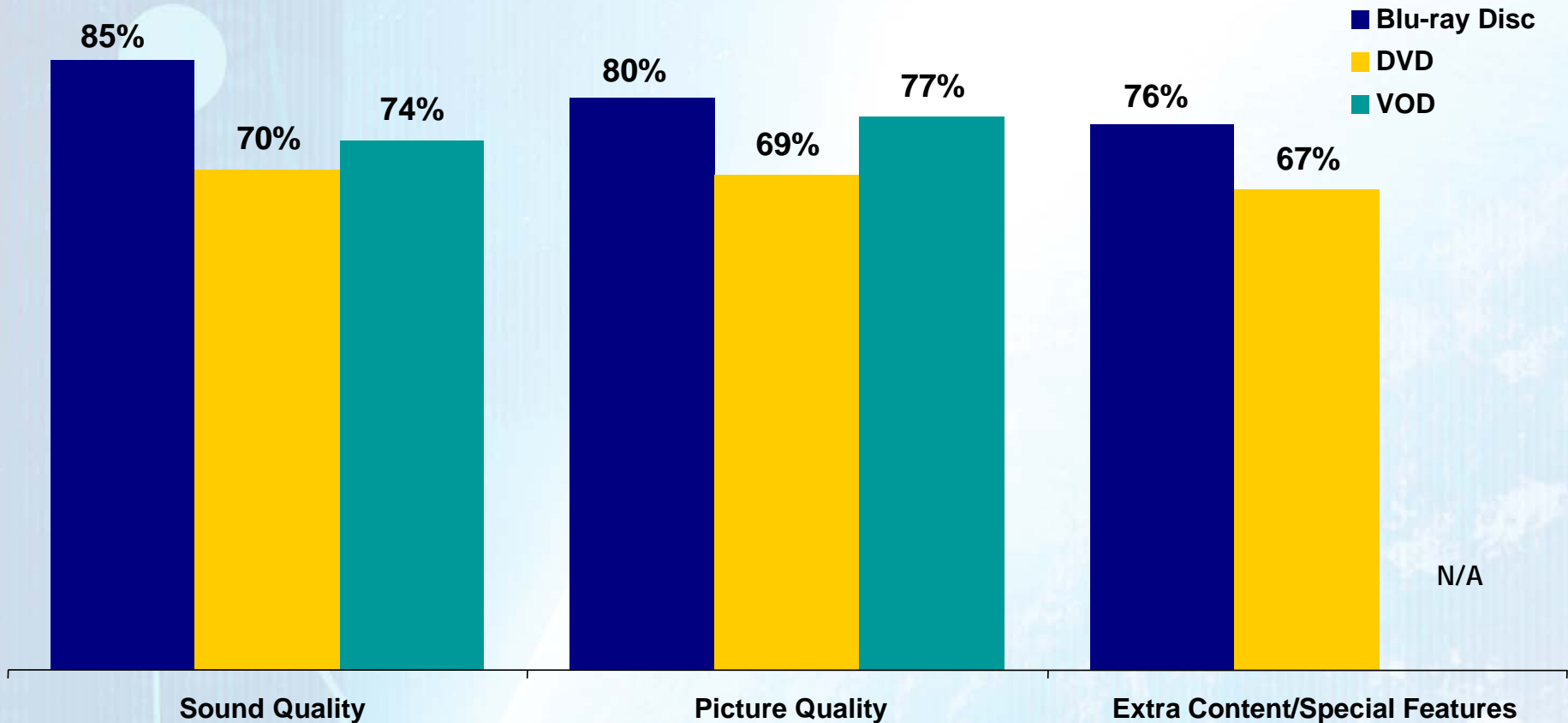




# The HD Media Landscape

## HDTV Owners Survey

### Satisfaction With Elements Across Platforms



# The HD Media Landscape

## HDTV Owners Survey

### Satisfaction With Elements Across Platforms (cont'd)

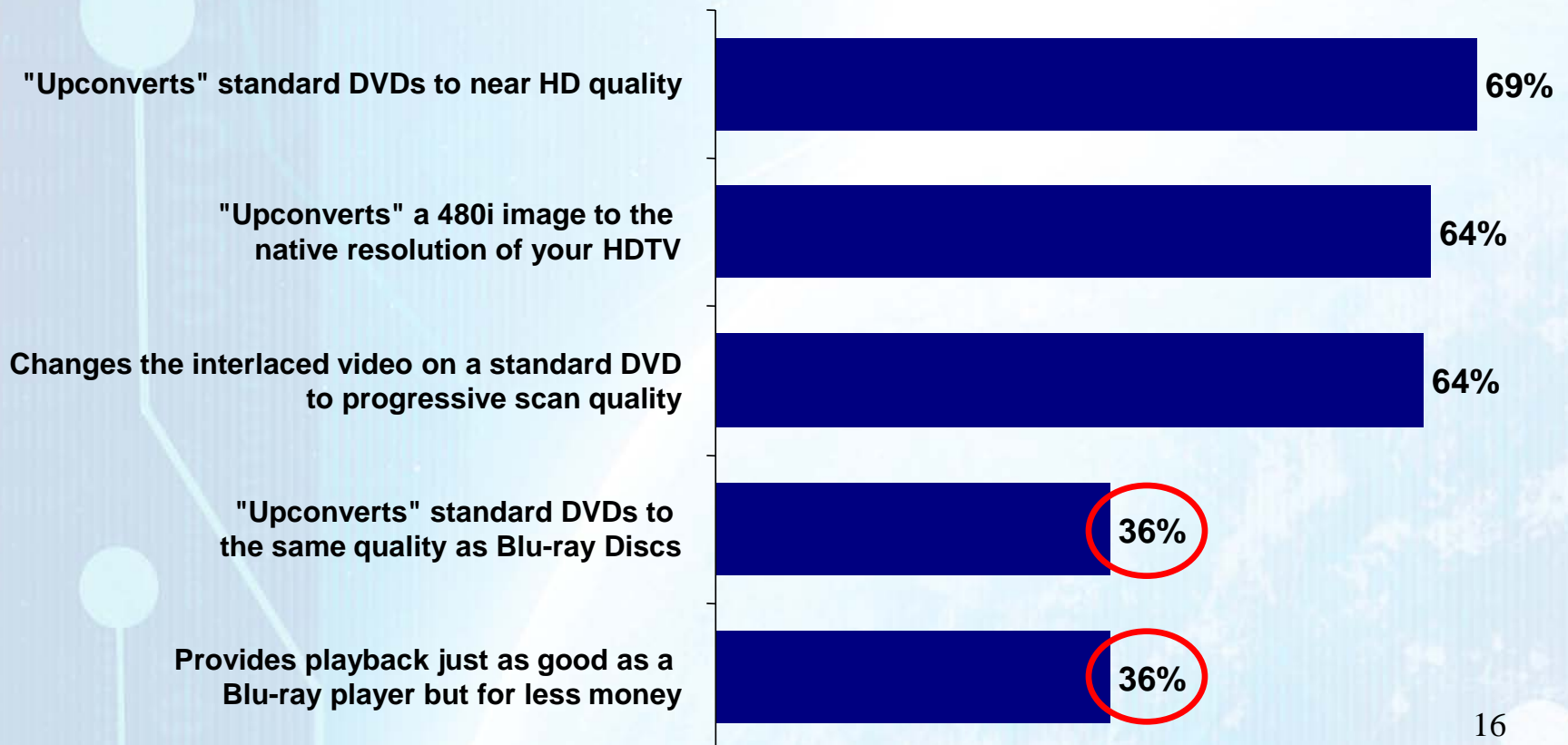


Based on users of Blu-ray Disc, DVD and VOD respectively

# The HD Media Landscape

## HDTV Owners Survey

### Opinions on Upconverting DVD Players

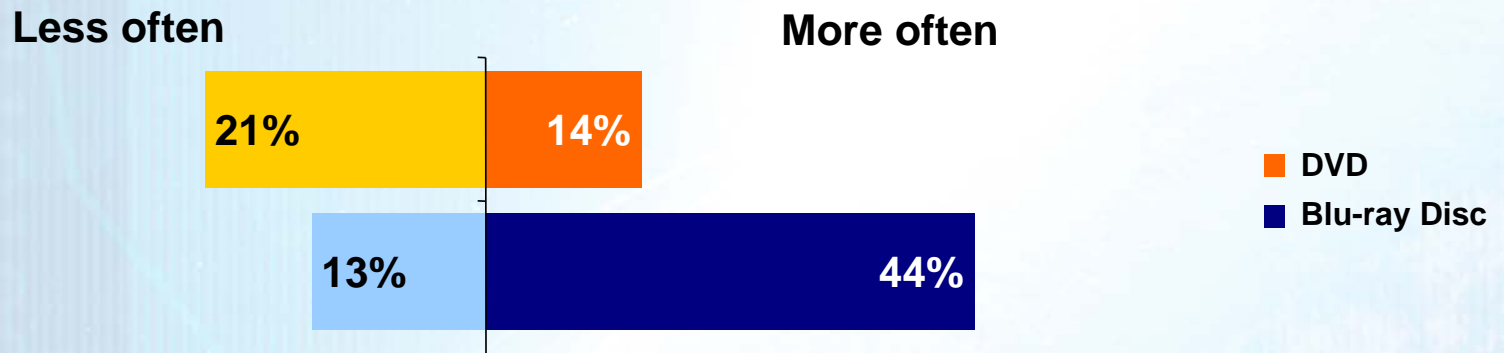


Based on respondents owning an upconverting DVD player

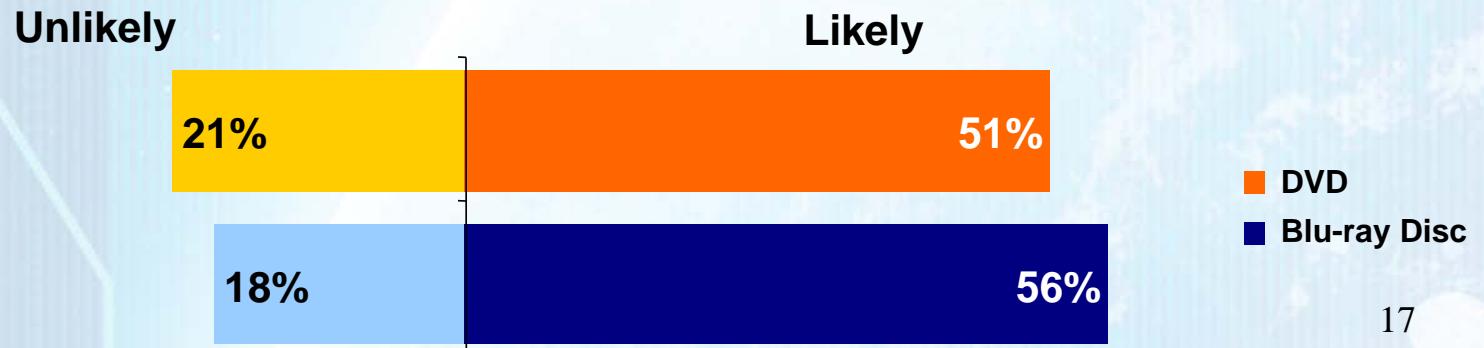
# The HD Media Landscape

## HDTV Owners Survey

### DVD/BD Viewing Frequency (Past Six Months)



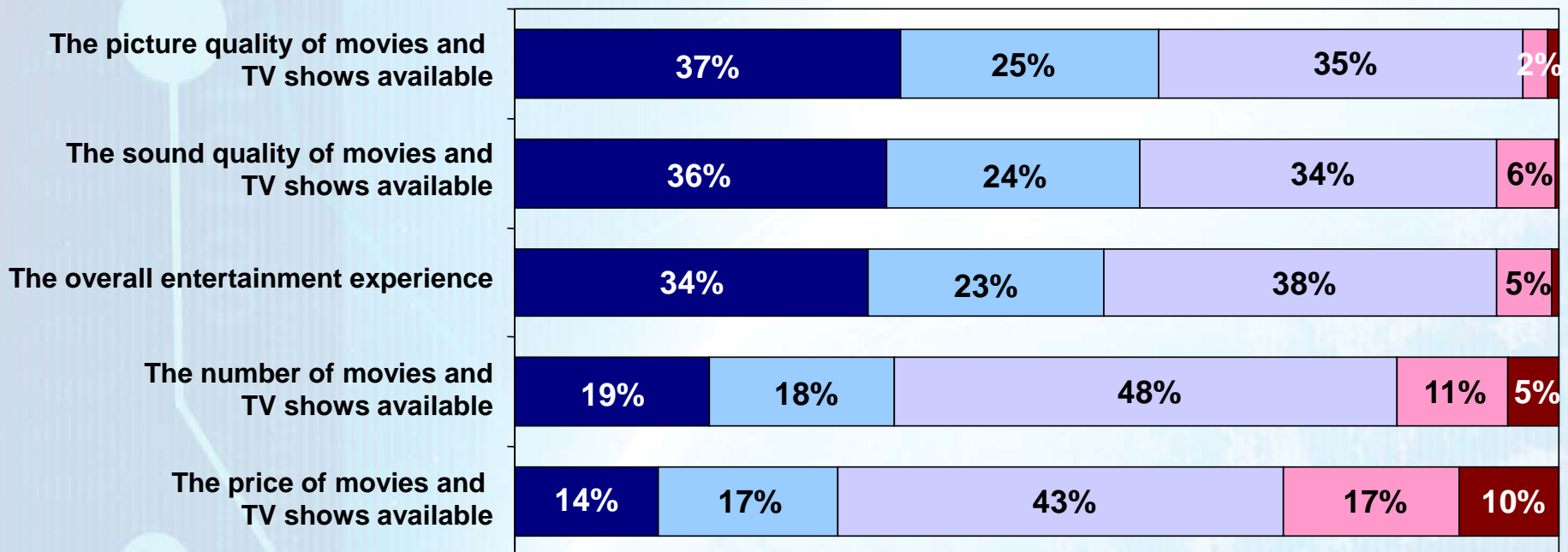
### Likelihood of Purchasing at Least One Disc (Next Six Months)



# The HD Media Landscape

## HDTV Owners Survey

### Blu-ray Disc vs. Streaming/Downloading Services

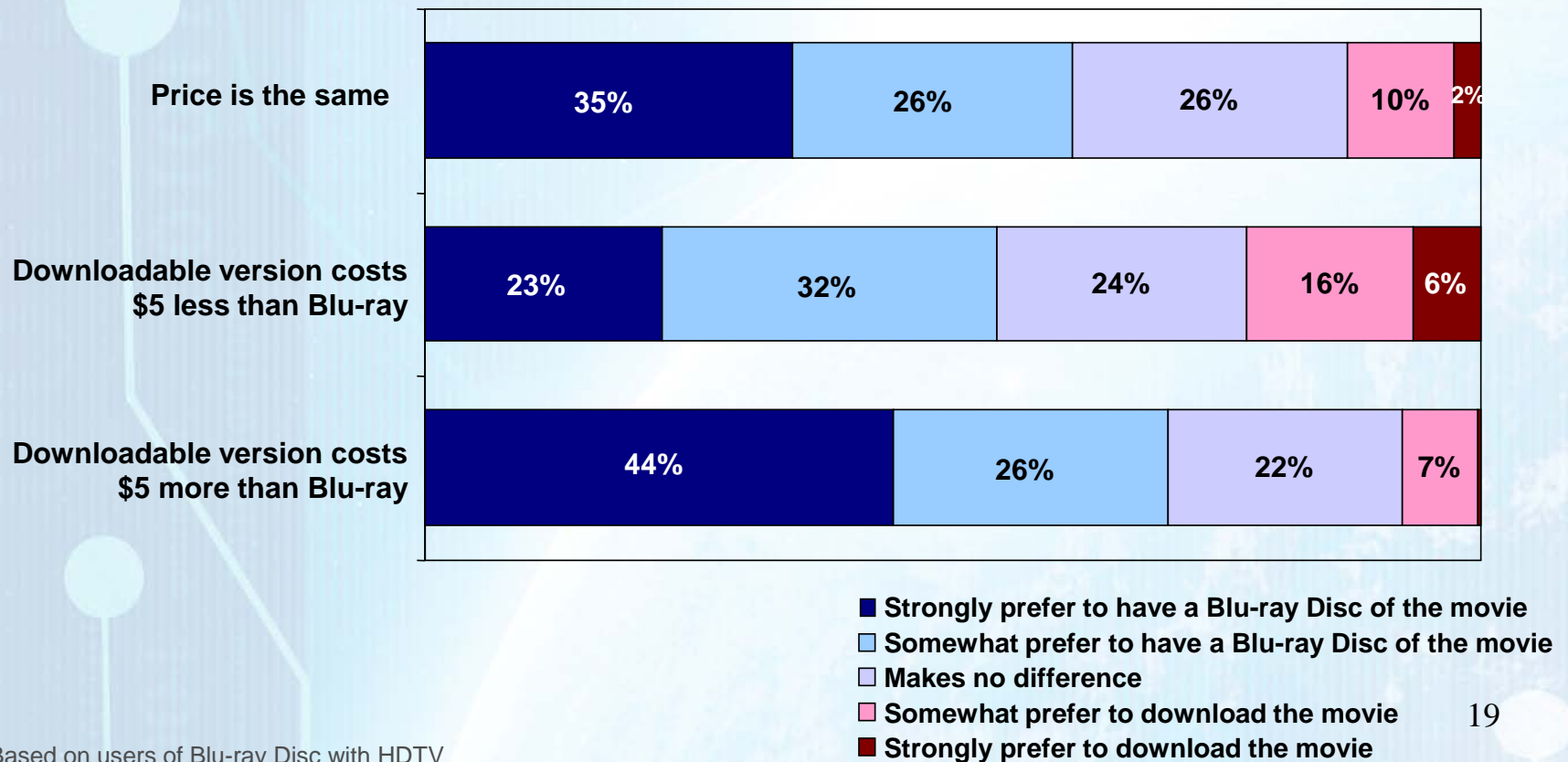


- Blu-ray Discs are much better
- Blu-ray Discs are somewhat better
- About the same
- Streaming/downloading services are somewhat better
- Streaming/downloading services are much better

# The HD Media Landscape

## HDTV Owners Survey

### Platform Preferences Based on Price

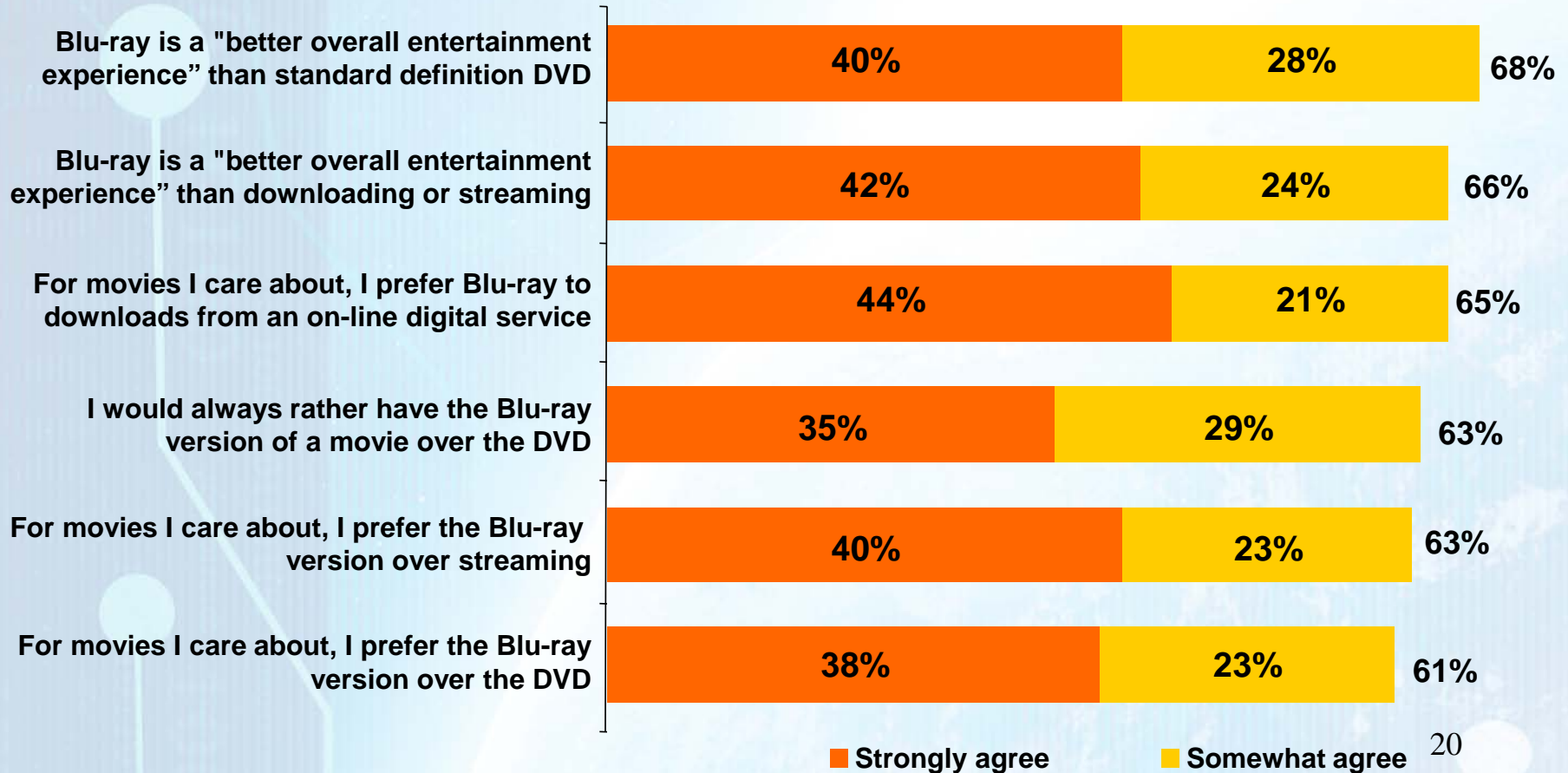




# The HD Media Landscape

## HDTV Owners Survey

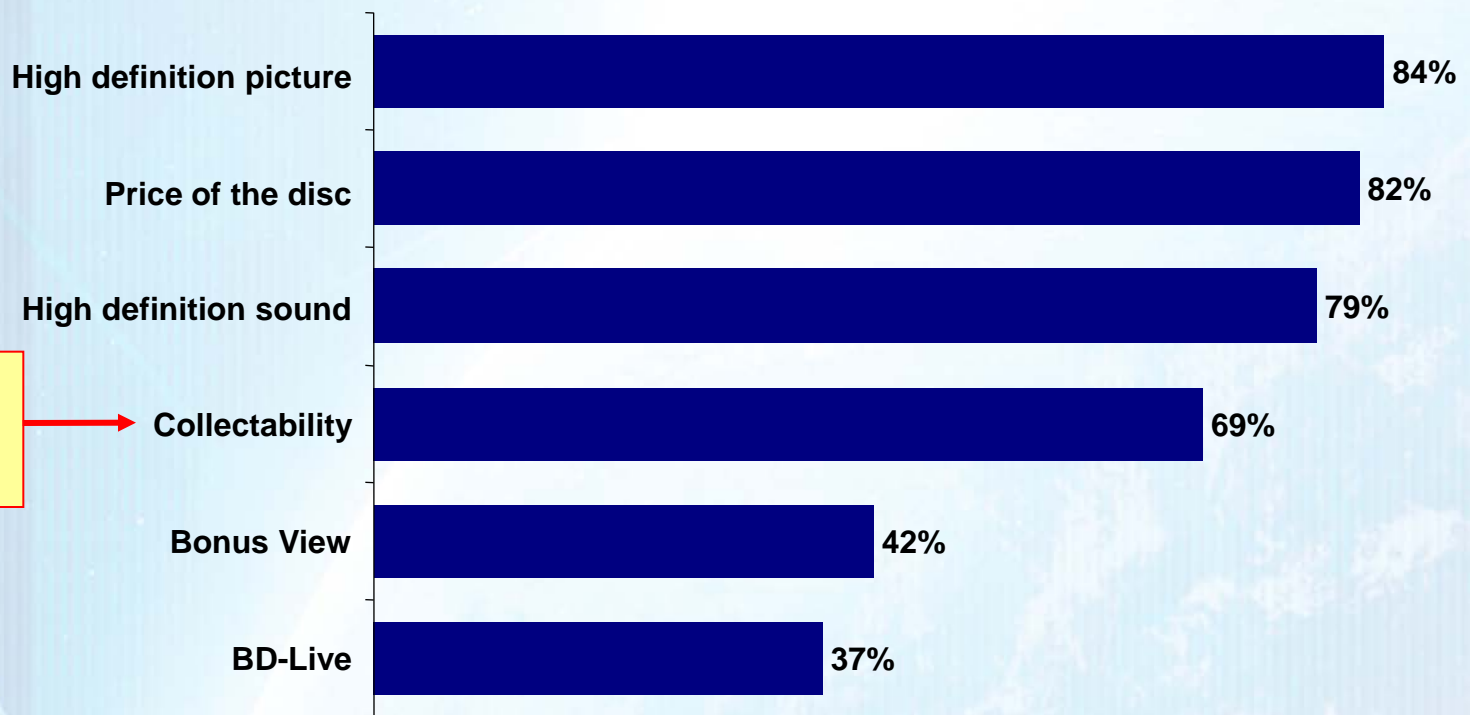
### Content Preferences



# The HD Media Landscape

## HDTV Owners Survey

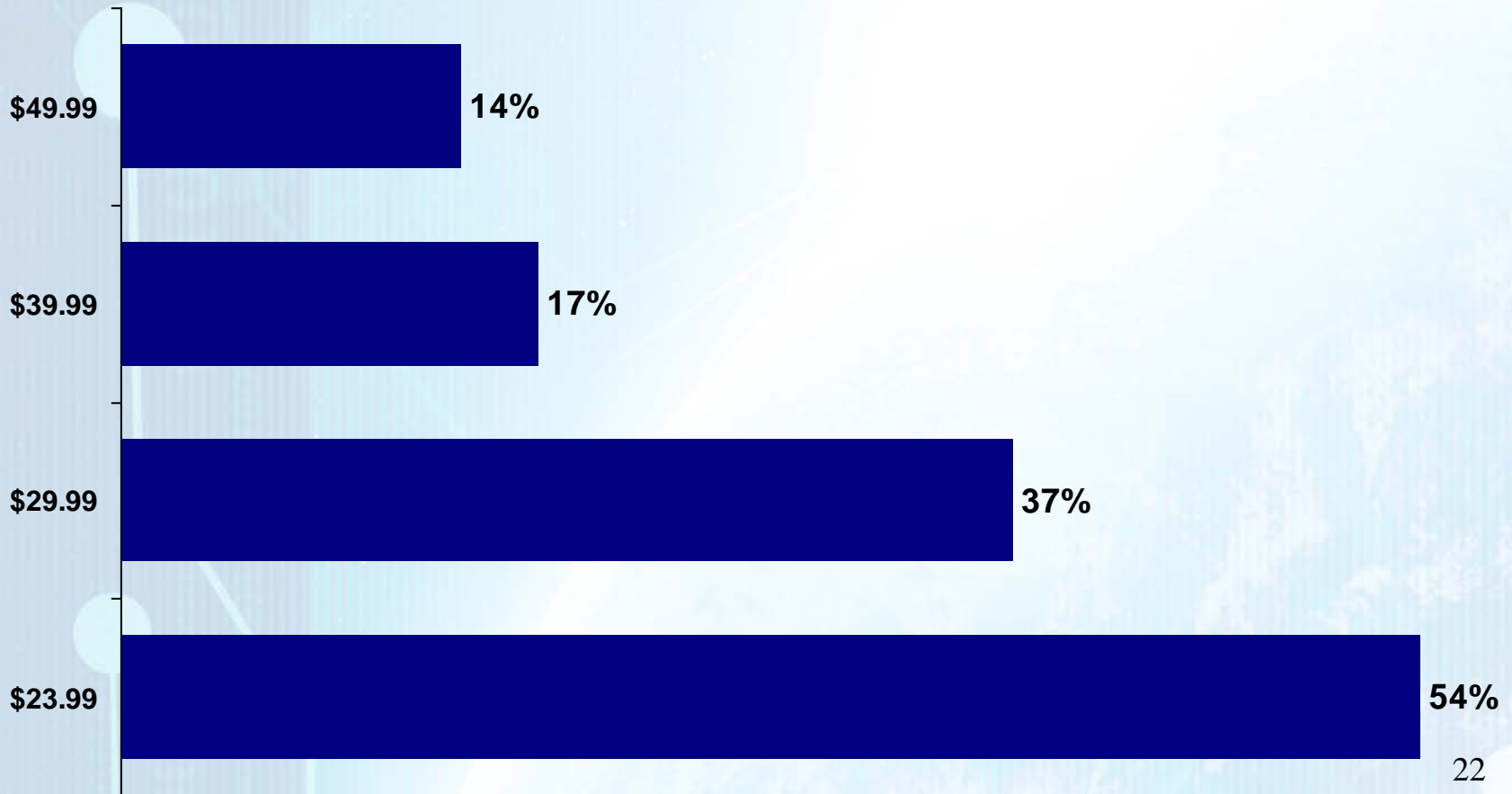
### Key Features in Decision to Purchase Blu-ray Disc



# The HD Media Landscape

## HDTV Owners Survey

### Likelihood of Purchasing a Blu-ray Title Based on Price

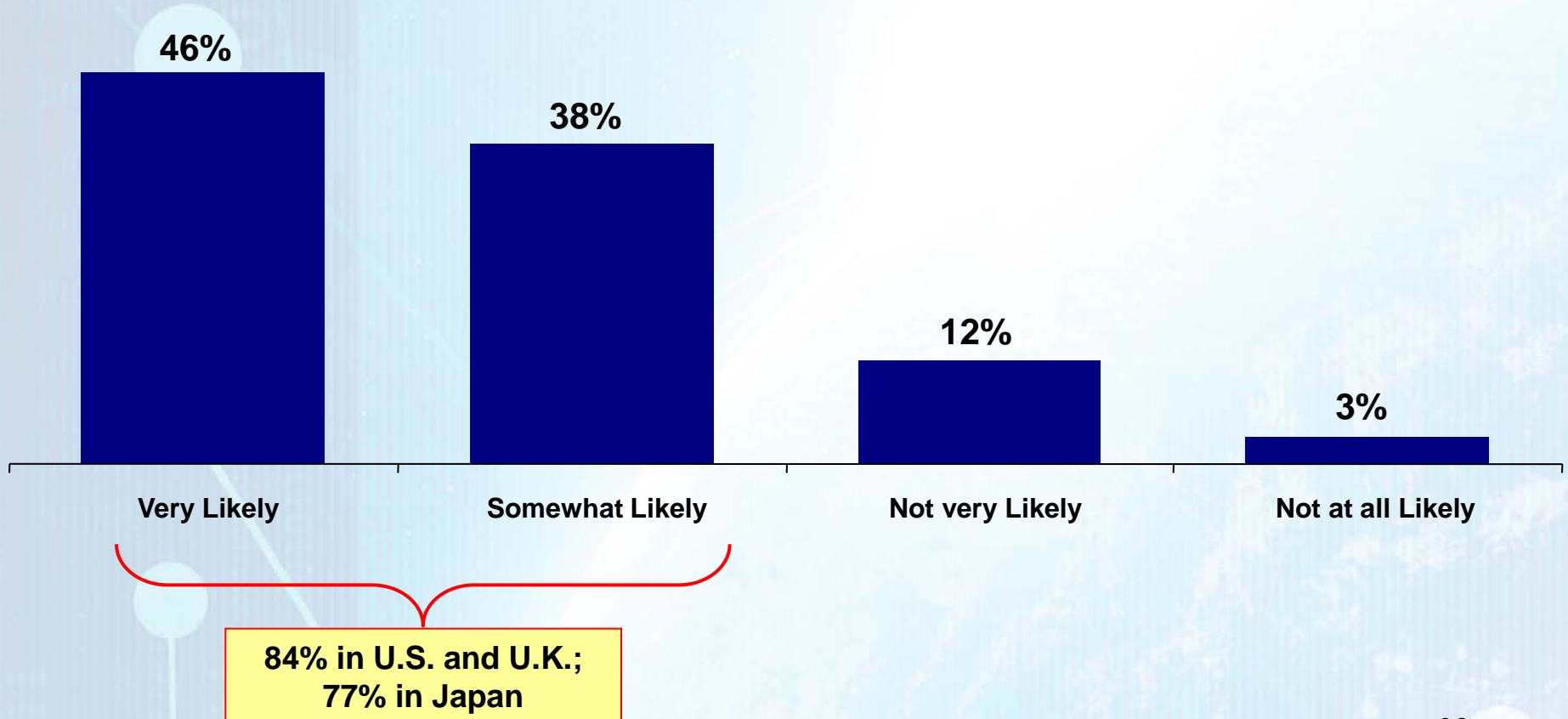


Based on users of Blu-ray Disc with HDTV

# The HD Media Landscape

## HDTV Owners Survey

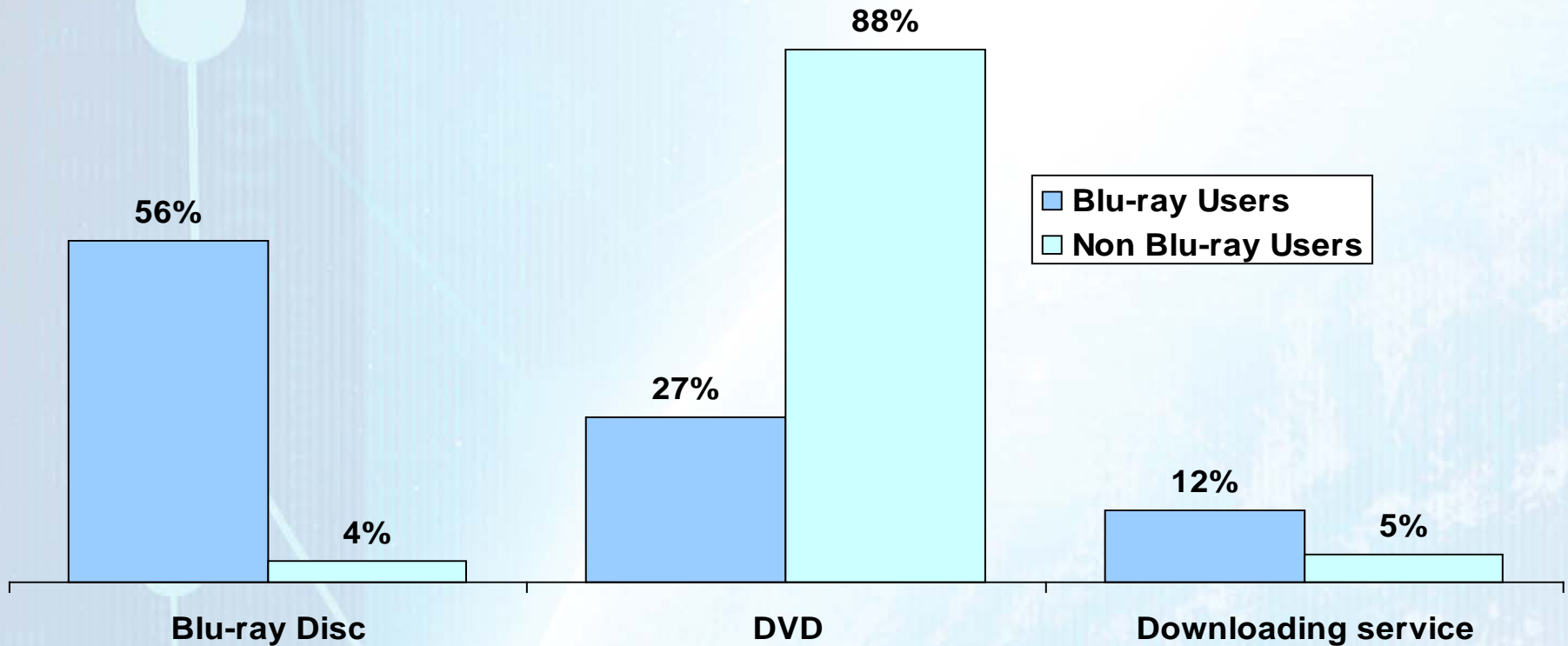
### Likelihood of Recommending Blu-ray Disc



# The HD Media Landscape

## HDTV Owners Survey

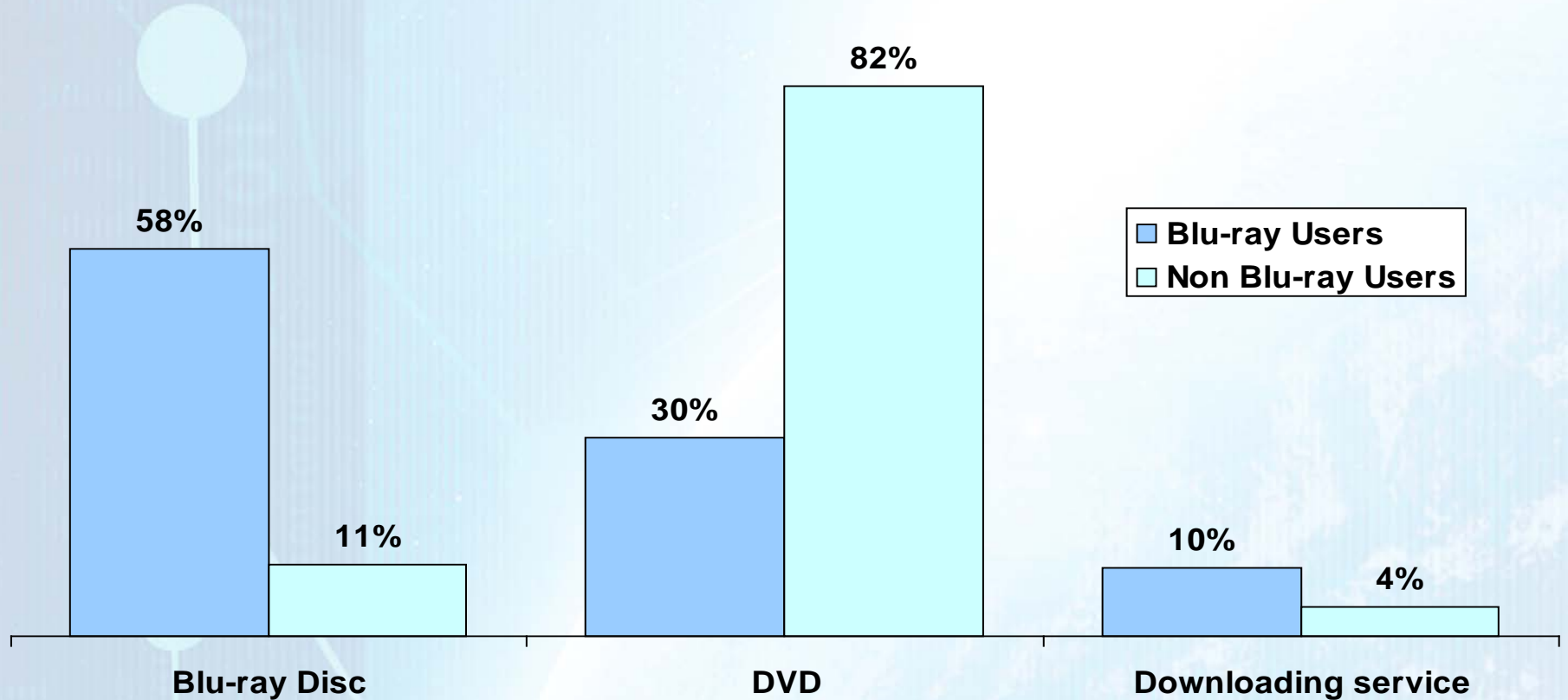
### Preferred Format for Movies You're Currently Purchasing DVD vs. Blu-ray



# The HD Media Landscape

## HDTV Owners Survey

### Preferred Format for Movies You Expect to Purchase (Next Six Months)

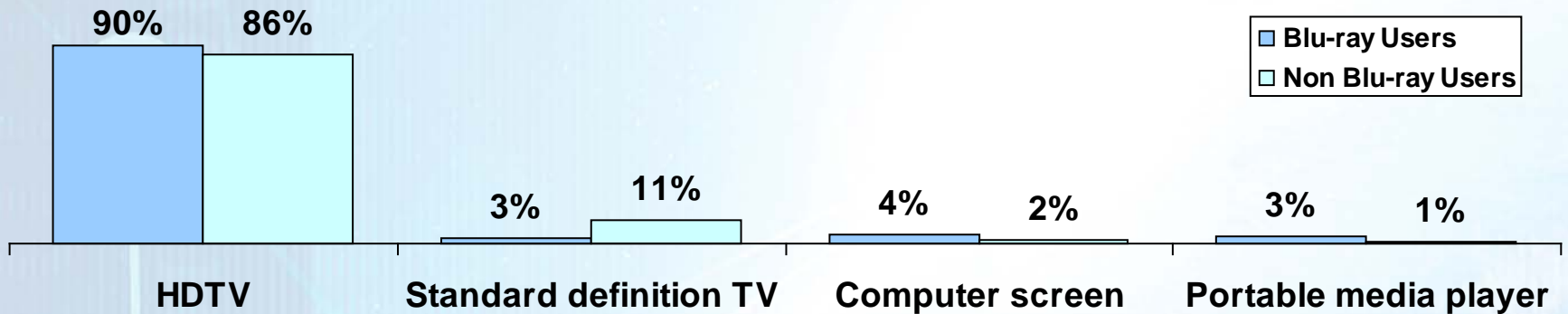




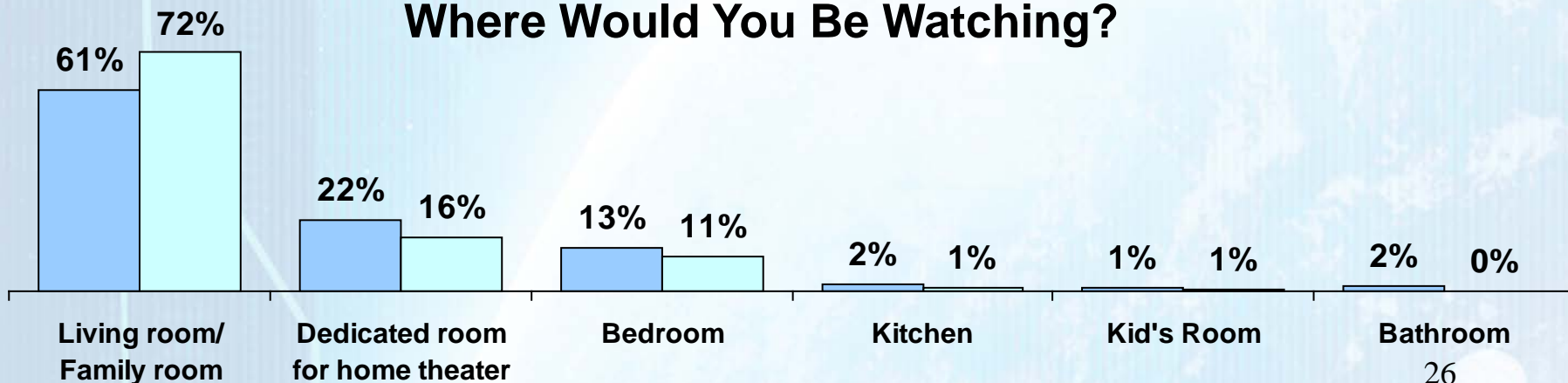
# Ultimate Home Entertainment Experience

## HDTV Owners Survey

### What Would You Be Watching?



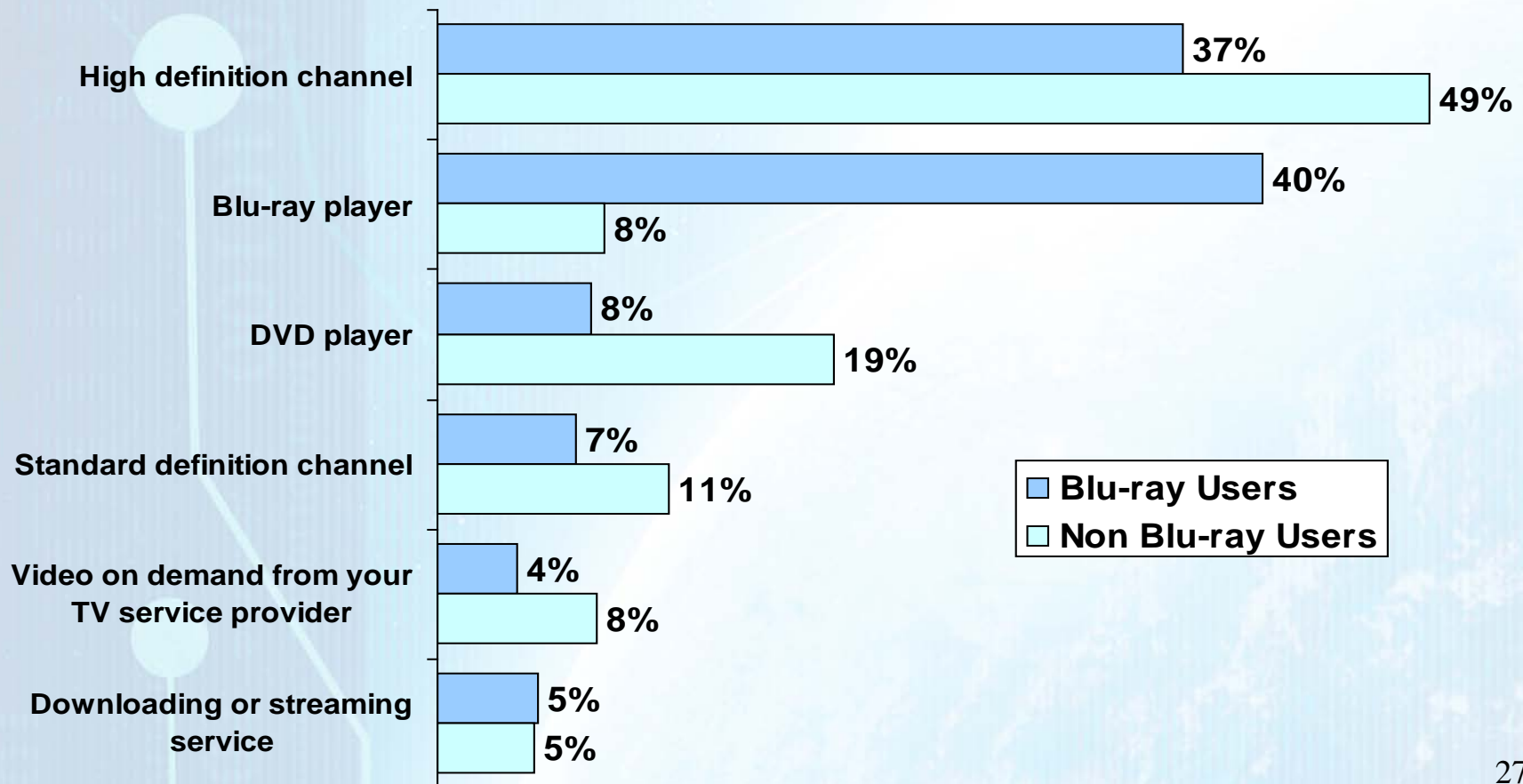
### Where Would You Be Watching?



# Ultimate Home Entertainment Experience

## HDTV Owners Survey

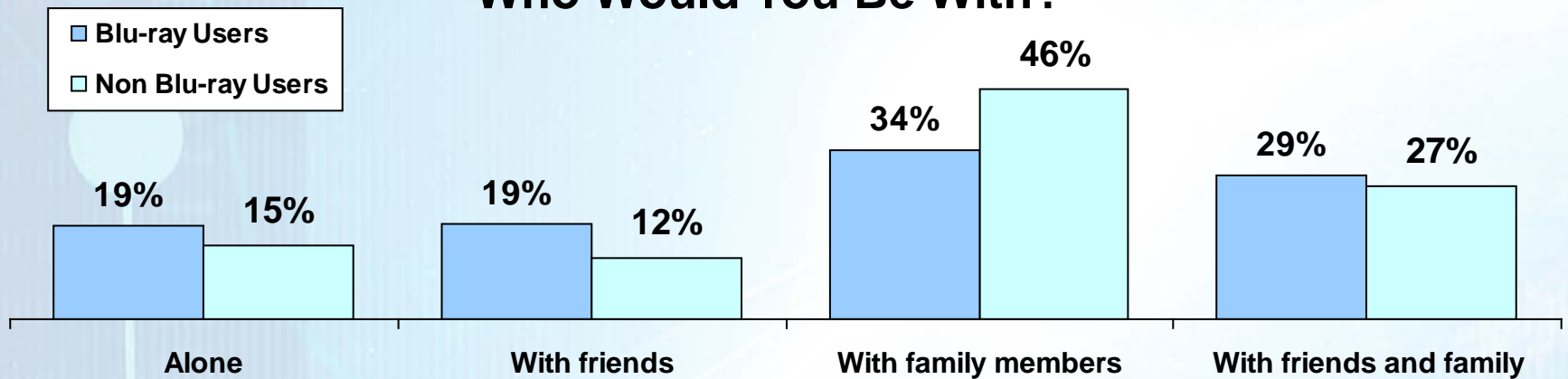
### Where Would You Get the Content?



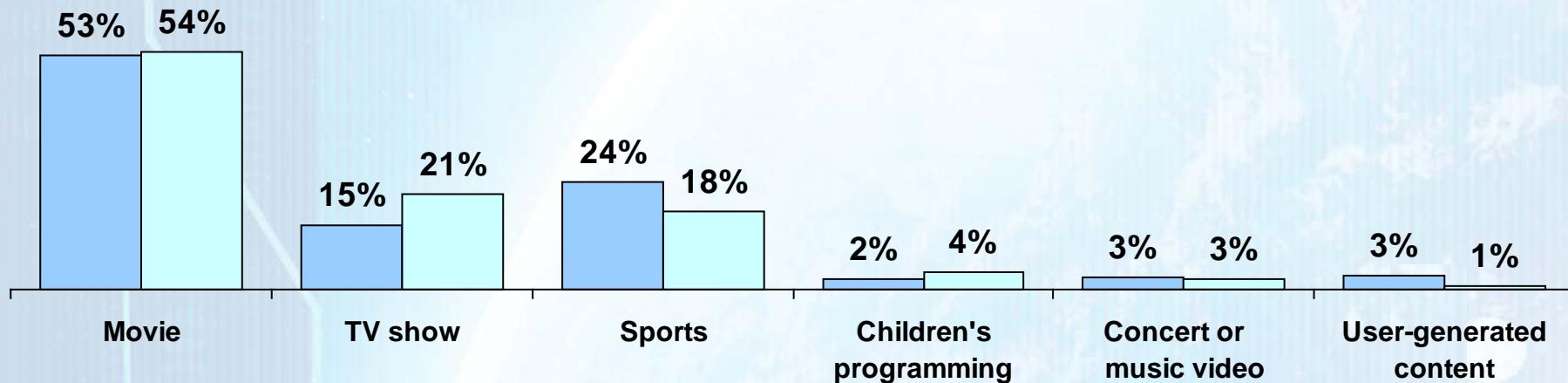
# Ultimate Home Entertainment Experience

## HDTV Owners Survey

### Who Would You Be With?



### What Type Of Content Would You Be Watching?



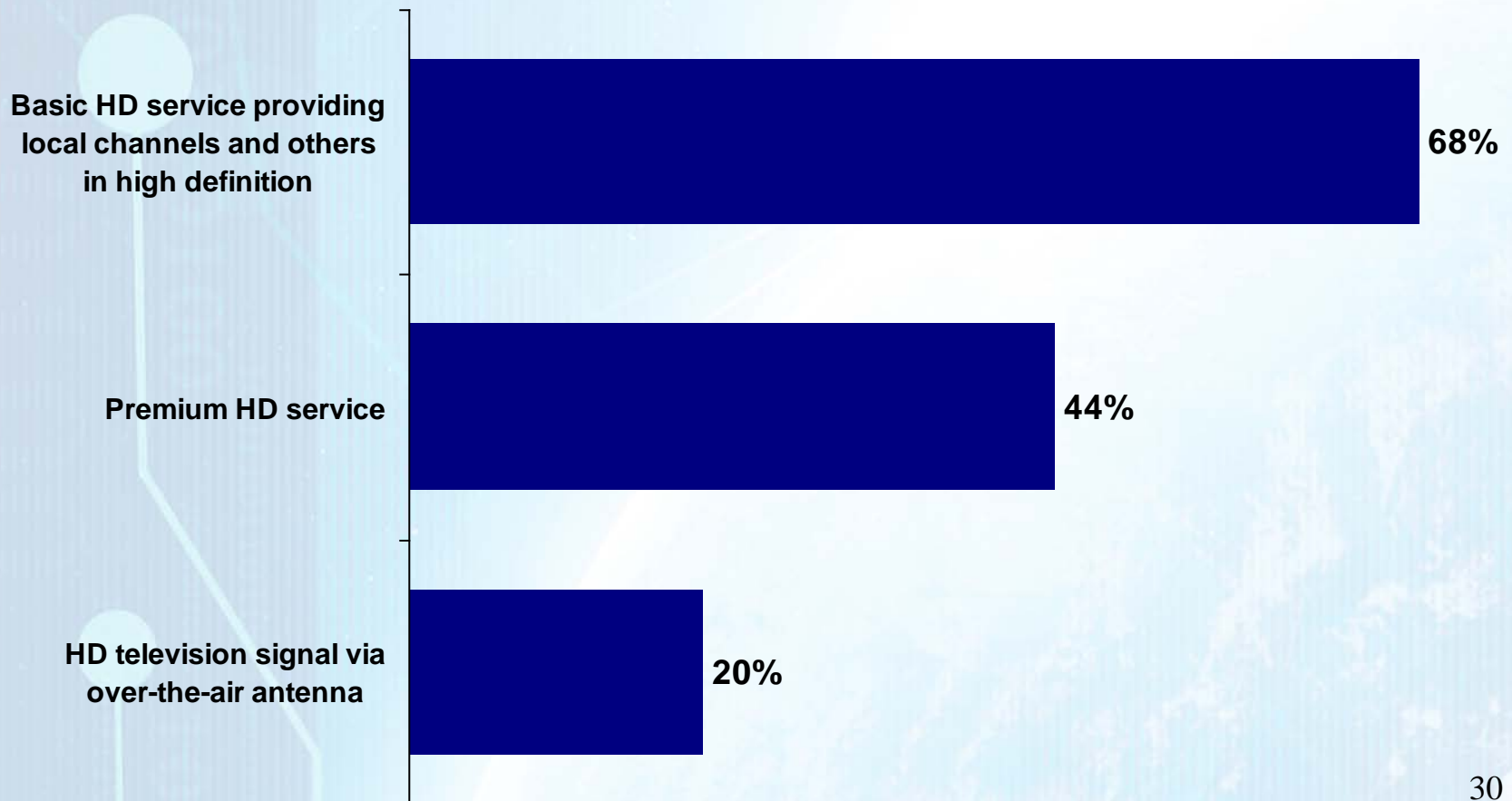


# Respondent Profile

# Respondent Profile

## HDTV Owners Survey

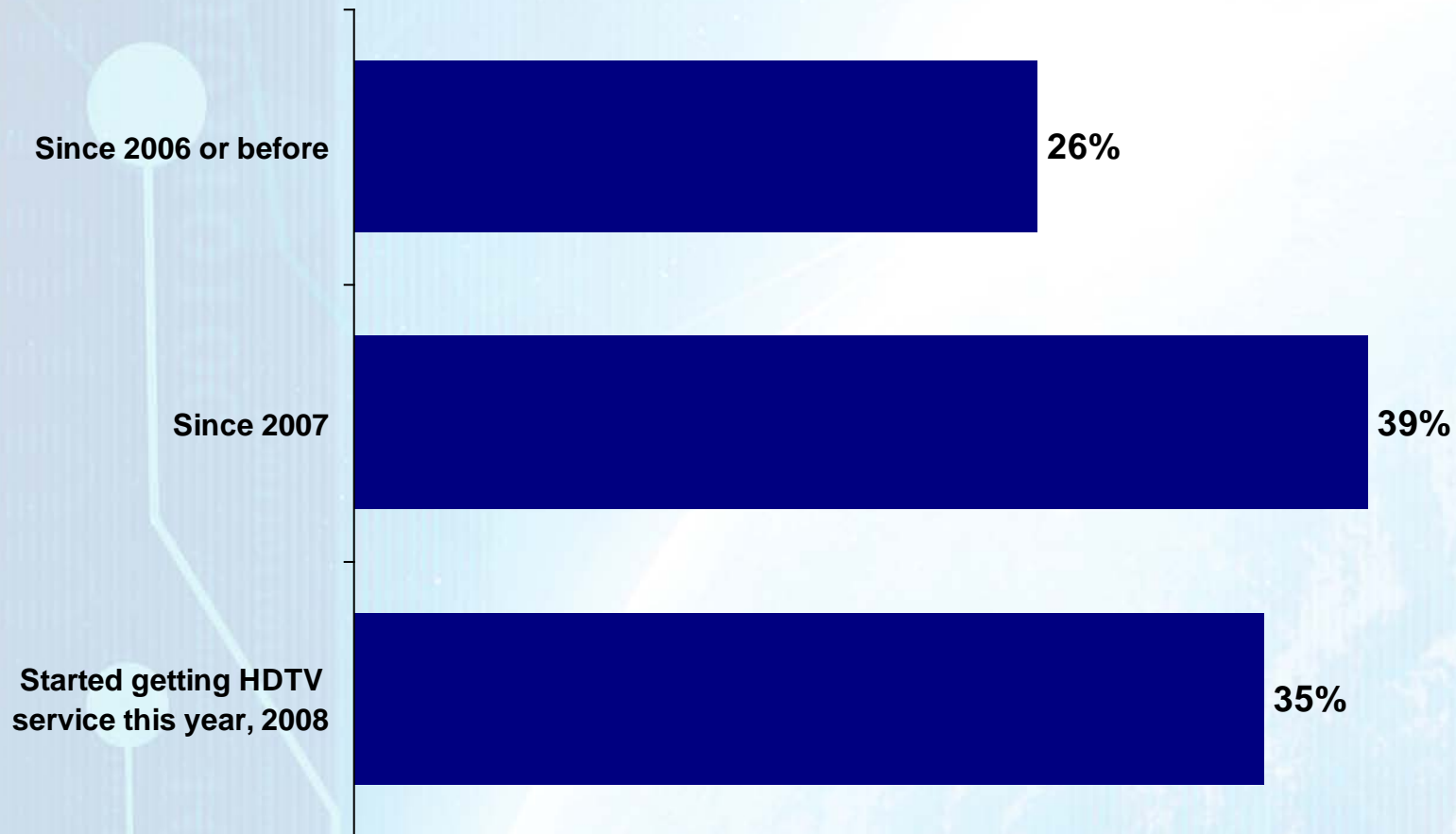
### Type of Subscription Service



# Respondent Profile

## HDTV Owners Survey

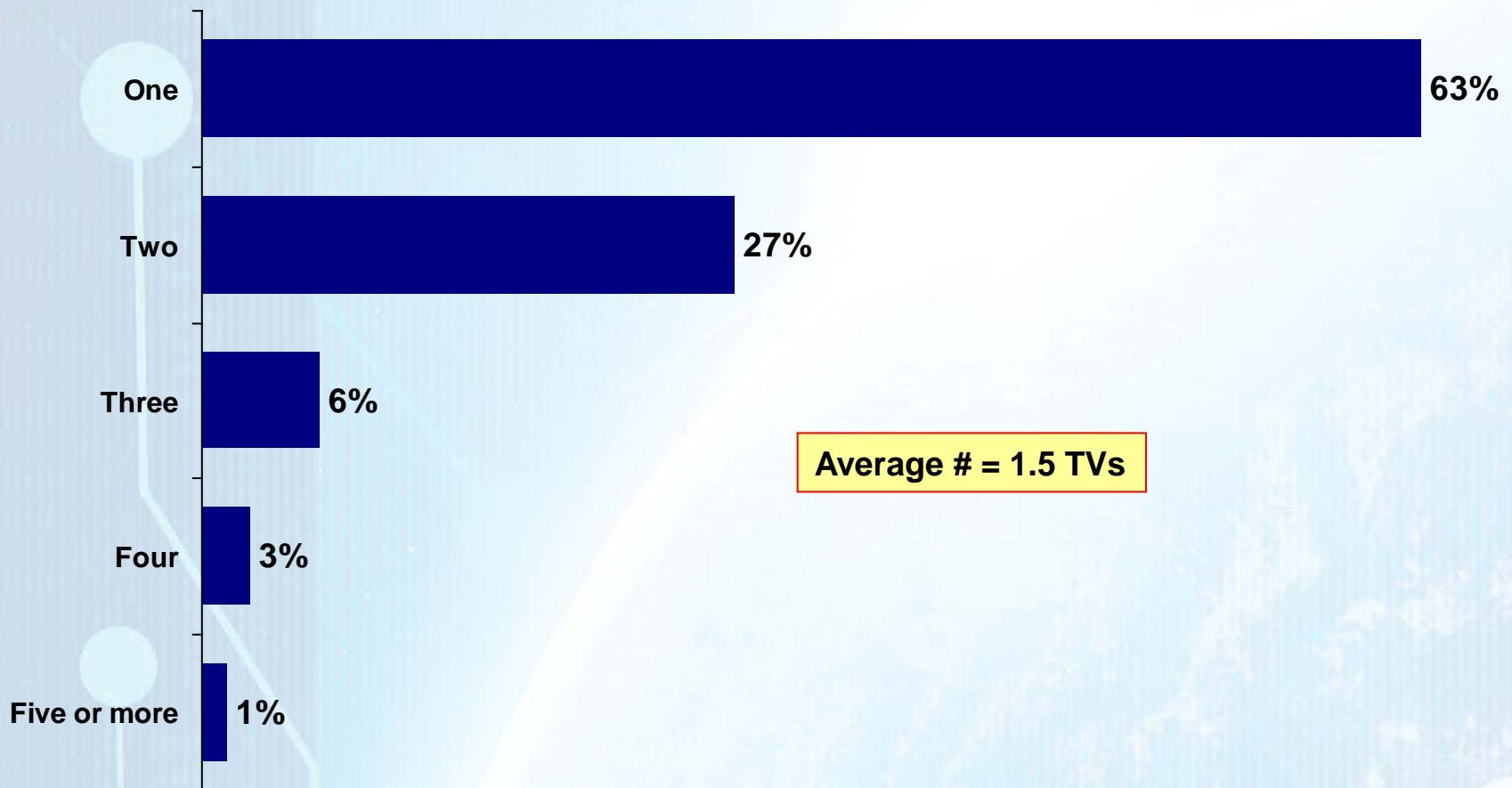
### Length of HDTV Service in Household





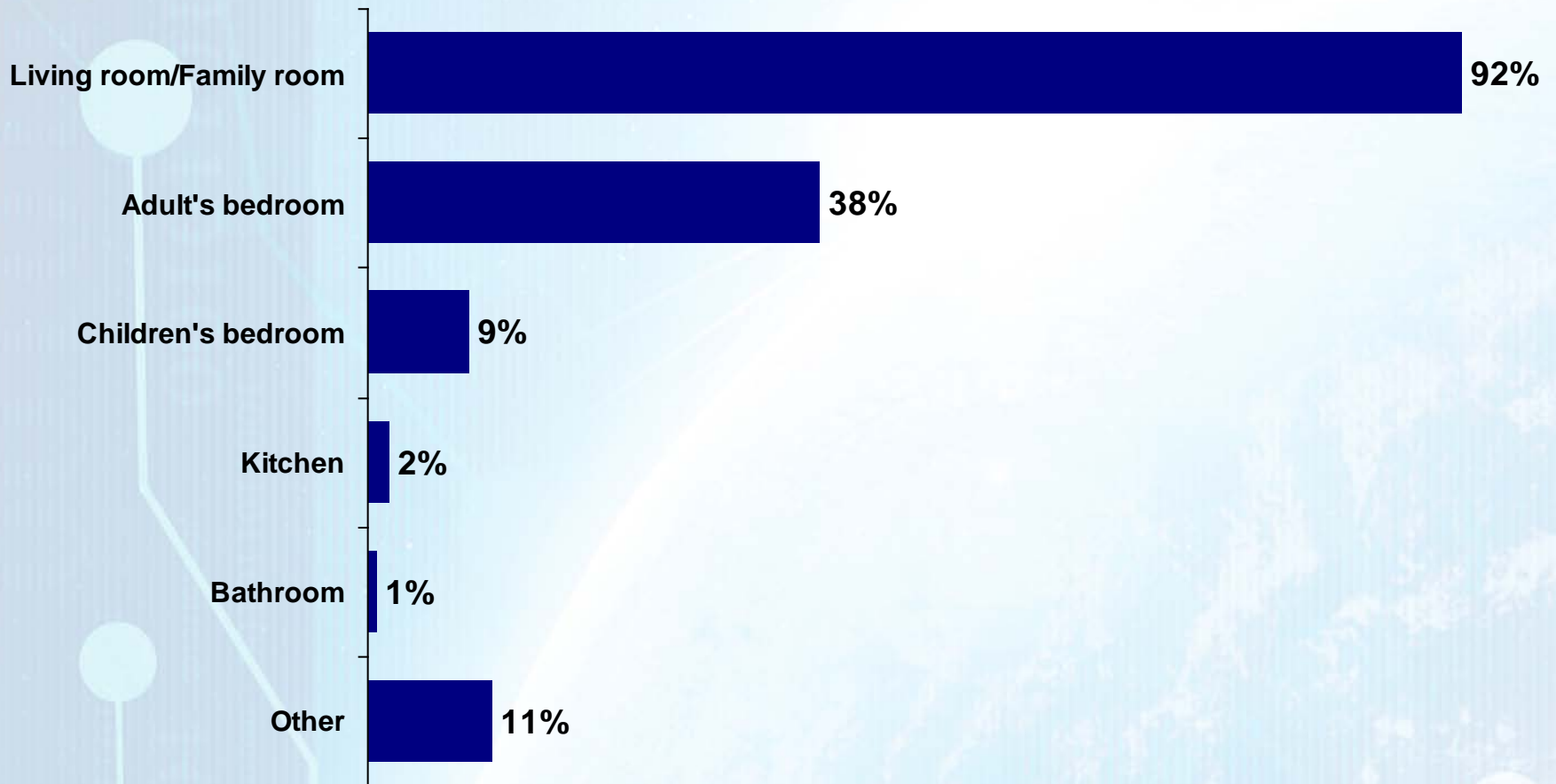
# HDTV Ownership HDTV Owners Survey

## Number of HDTVs Currently Owned



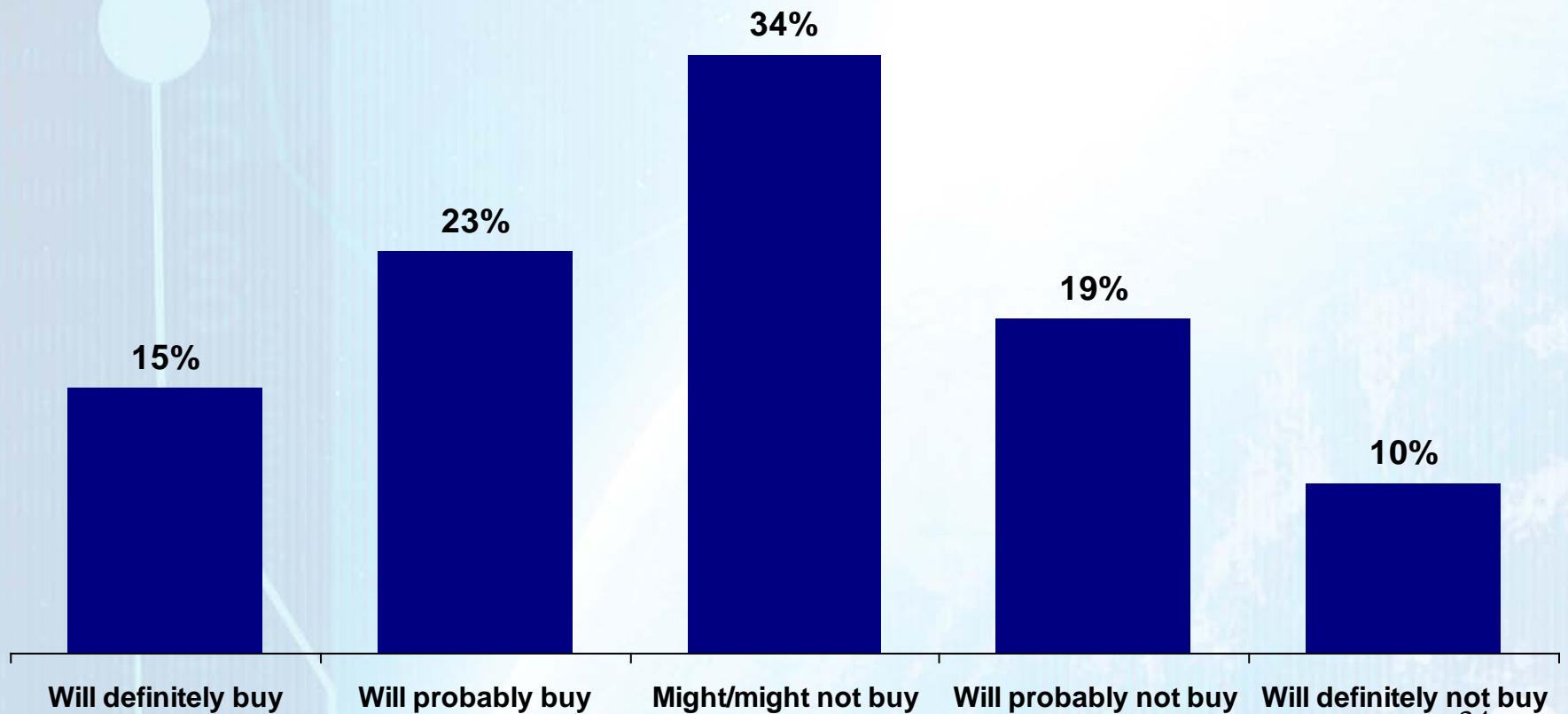
# HDTV Ownership HDTV Owners Survey

## Where Is Your HDTV Located?



# HDTV Ownership HDTV Owners Survey

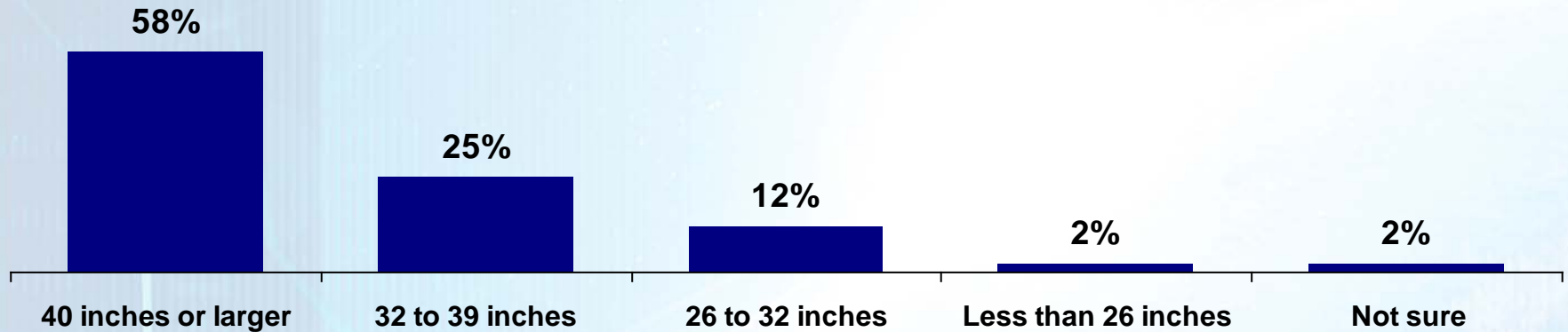
## Likelihood Of Buying Another HDTV in Next Year



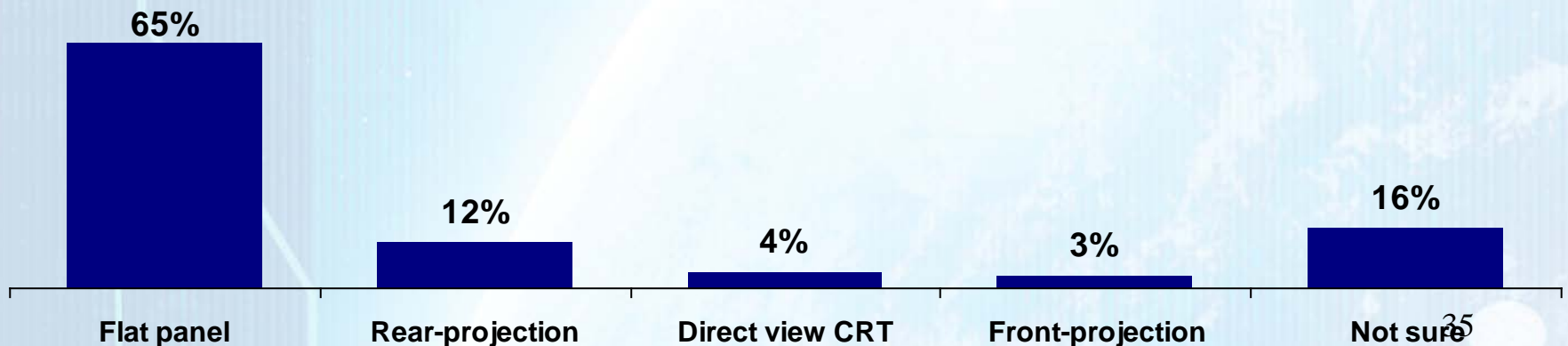
# HDTV Ownership

## HDTV Owners Survey

### Approximate Screen Size of Largest HDTV



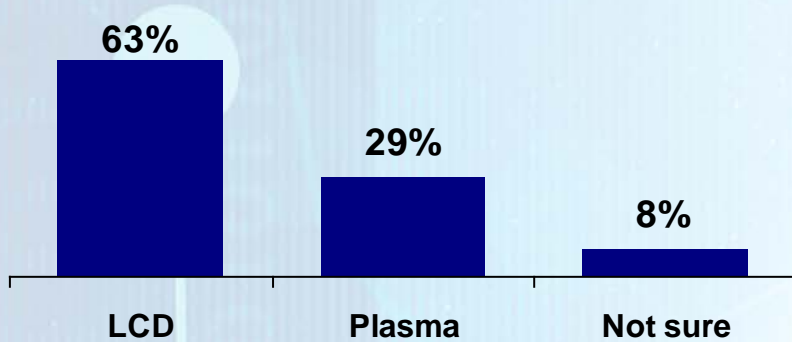
### Type of HDTV of Largest in Home



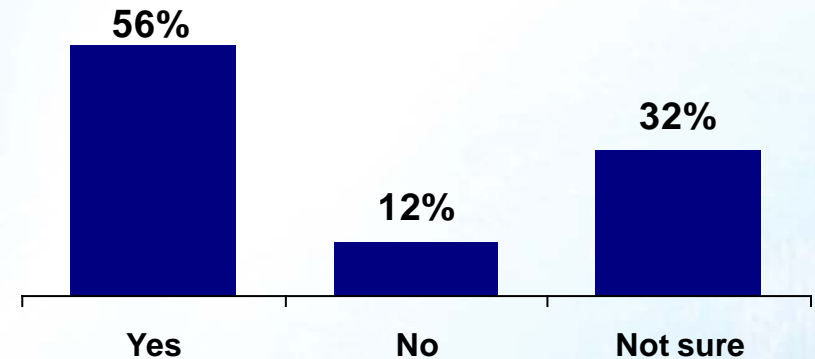
# HDTV Ownership

## HDTV Owners Survey

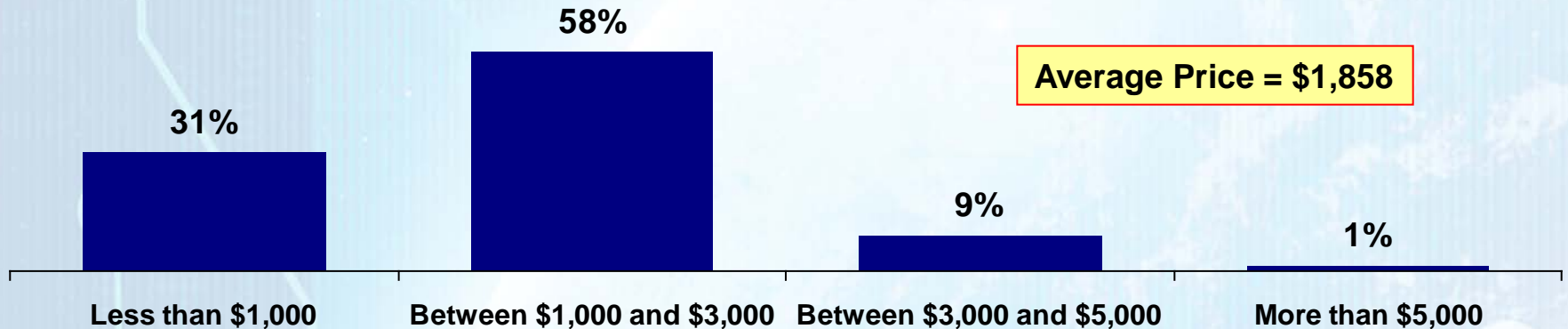
### Type of Flat-Panel\*



### Support Full 1080p Resolution?



### How Much Did You Pay for Your HDTV?



\*Based on those whose largest HDTV is a flat-panel



# HDTV Owners

## The Prospects for High-Definition Media

### DEG Addendum