

An Update on Ultra HD

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The State of UHD

By the Numbers: Ultra HD at 2013 CES

- 46 UHD TVs
- 15 brands
- 40 for consumer use



Changhong, Haier, Hisense, Konka, LG, Panasonic, Samsung, Sharp, Skyworth, Sony, TCL, Toshiba, ViewSonic and Westinghouse



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Beyond Displays: UHD at 2013 CES

- **Samsung:** HT-F9750W (HTiB) with Ultra HD/upsc.
- **Sony:** prototype UHD Handycam
- **Panasonic:** prototype 4K prosumer camcorder
- **NVIDIA:** Project Shield, outputs UHD resolution via HDMI to compatible display
- **Toshiba:** Blu-ray player upscales 1080p to UHD
- **Panasonic:** VPL-VW1000ES UHD projector
- **JVC:** GY-HMQ10 UHD camcorder



By the Numbers

43,724

2013 UHD TVs shipped
through October 2013

57,000

CEA forecast of 2013 UHD
TV shipments

25,800

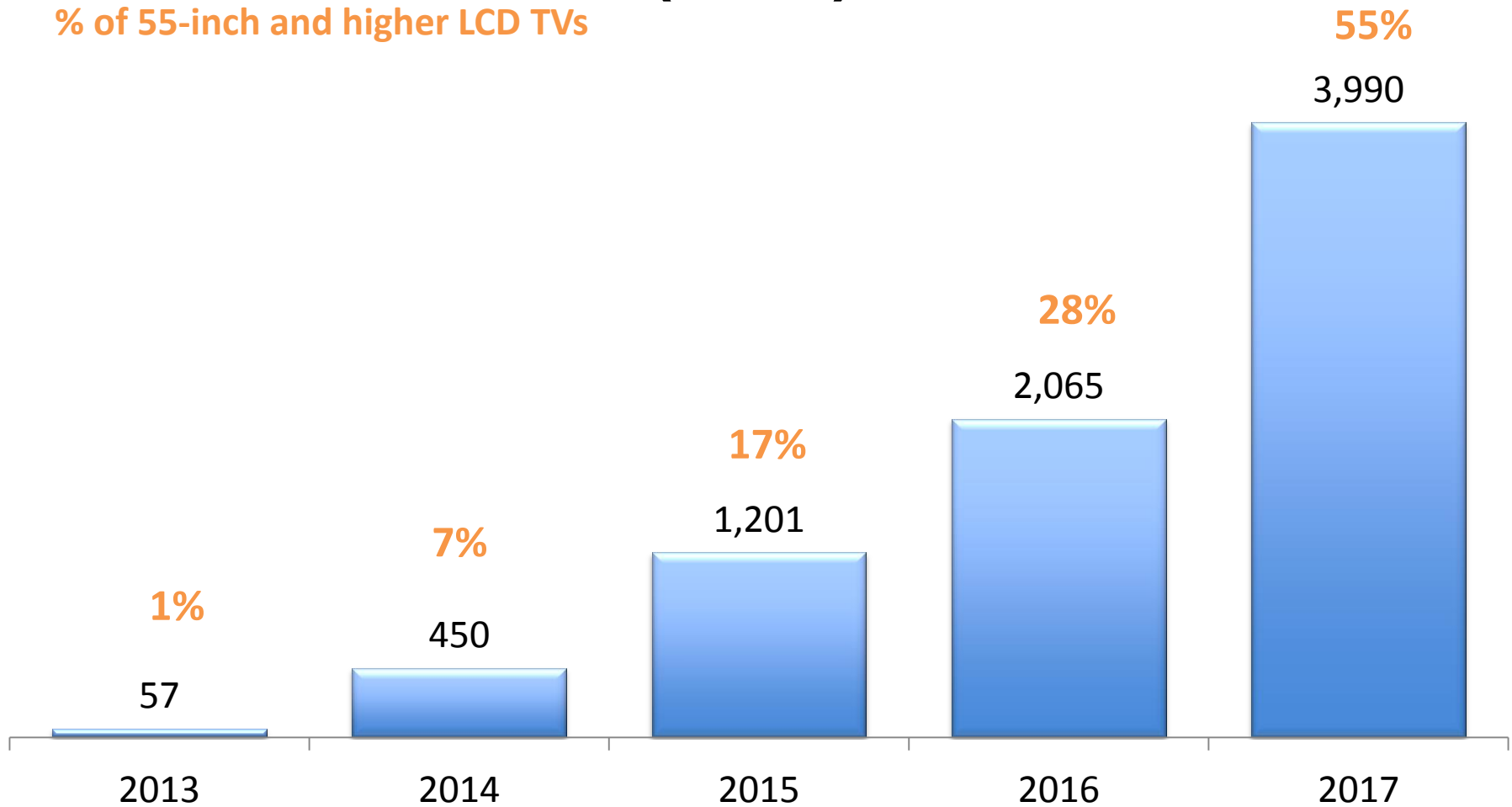
CEA forecast of 2013 holiday
(Q4) UHD TV shipments



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Ultra HDTV - U.S. Unit Shipment Forecast (000s)

% of 55-inch and higher LCD TVs

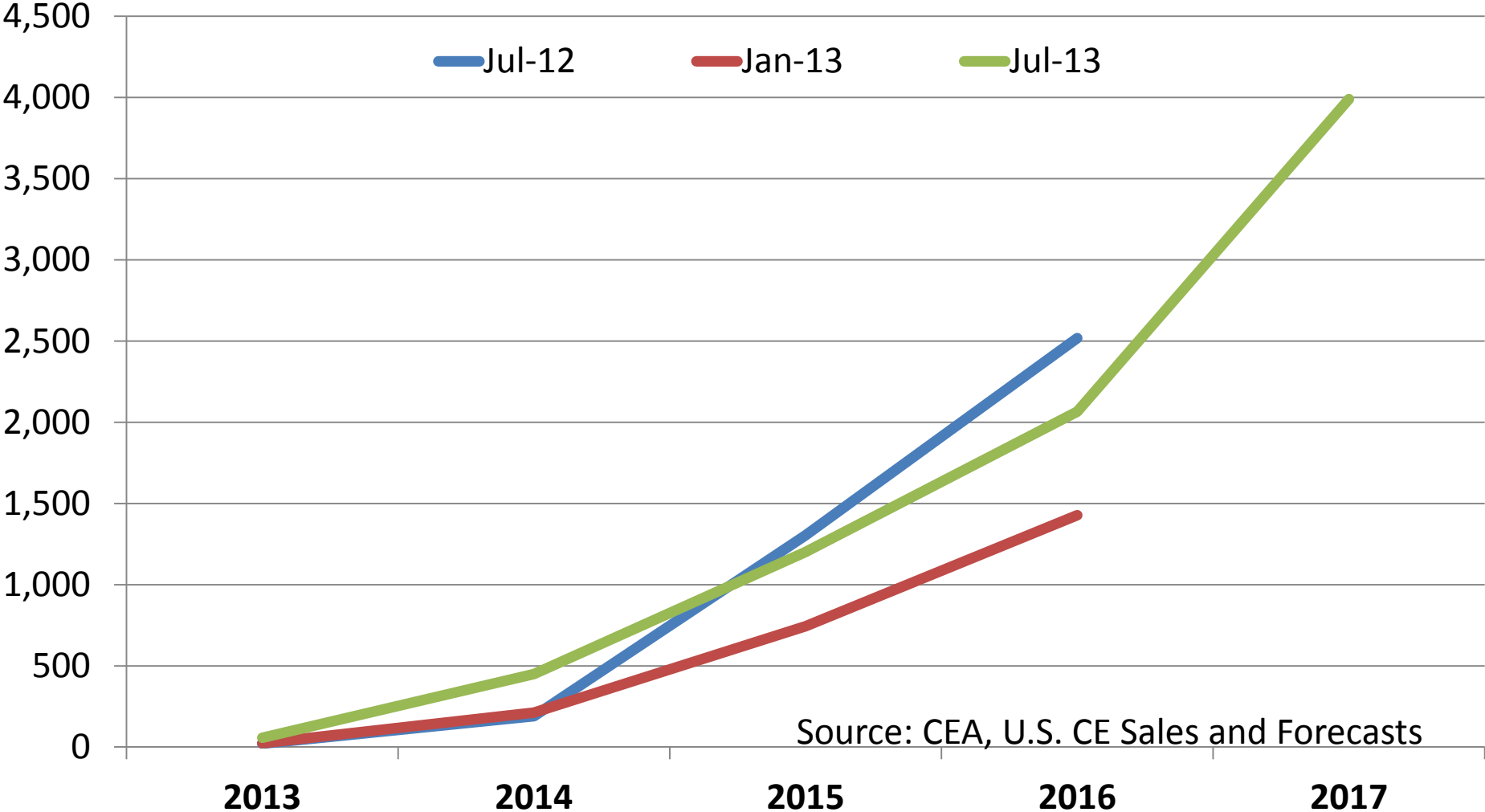


Source: CEA, July 2013 CE Sales and Forecasts

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Forecasting Ultra HD

U.S. Market - Units (000s)



Source: CEA, U.S. CE Sales and Forecasts



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Consumer Familiarity with the Vernacular

Term	Familiarity
HDTV	97%
High Definition TV	96%
Plasma TV	94%
LCD TV	90%
3DTV	87%
LED LCD TV	81%
Ultra High Definition TV	64%
Ultra HD TV	55%
OLED TV	38%
Ultra HD 4K TV	32%
Upconverting	30%
4K TV	27%

Q: How familiar or unfamiliar are you with each of the following terms? (%)



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Where are Consumers “Experiencing” Ultra HD?

In-Store Experience

29.2M

of U.S. Adults who have seen or heard about Ultra HD at retail (14%)

21.3M

of U.S. Adults have seen an Ultra HD on display (73%)

12.5M

of U.S. Adults have seen in-store promotions for Ultra HD TVs (43%)

10.9M

of U.S. Adults have seen a demo (37%)

10.0M

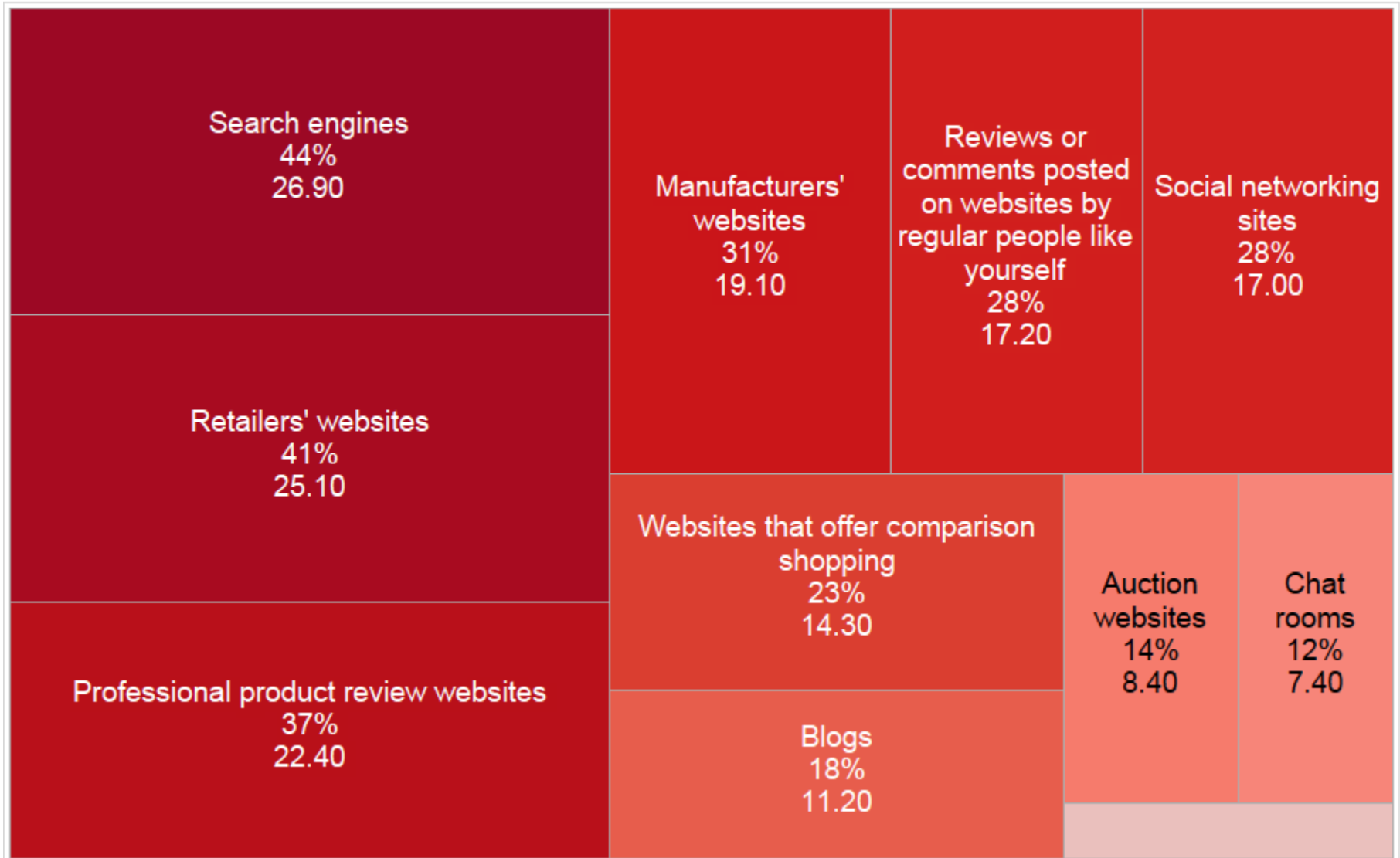
of U.S. Adults have talked to a salesperson about Ultra HD TVs (34%)



52.3M

of U.S. Adults who have seen or heard about Ultra HD on the Internet (25%)

Where on the Internet, have you seen or heard information about Ultra HD TVs?



Consumer Sentiment Towards Ultra HD

49%

of U.S. Adults see arrival of
technology as a net positive

39%

Are interested in
owning the technology



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The “Next” TV Purchase

Motivations for the Next TV Purchase

Term	Familiarity
Replace an aging, obsolete or broken set	59%
Improve picture quality	43%
Get a larger screen size	42%
More energy efficient	27%
To have the newest TV technology	25%
Improve sound quality	25%
Get access to content on the internet	19%

Q: What will most likely prompt your household to buy its next television?



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Purchase Decision and Inhibitors

80%

Want to see the product in a store before buying

67%

Want a demo before buying

62%

Want to talk to a salesperson about the product

75%

Are concerned about the cost of the TV

44%

Cost of UHD video content from a paid provider to watch on the TV



Importance of TV Features

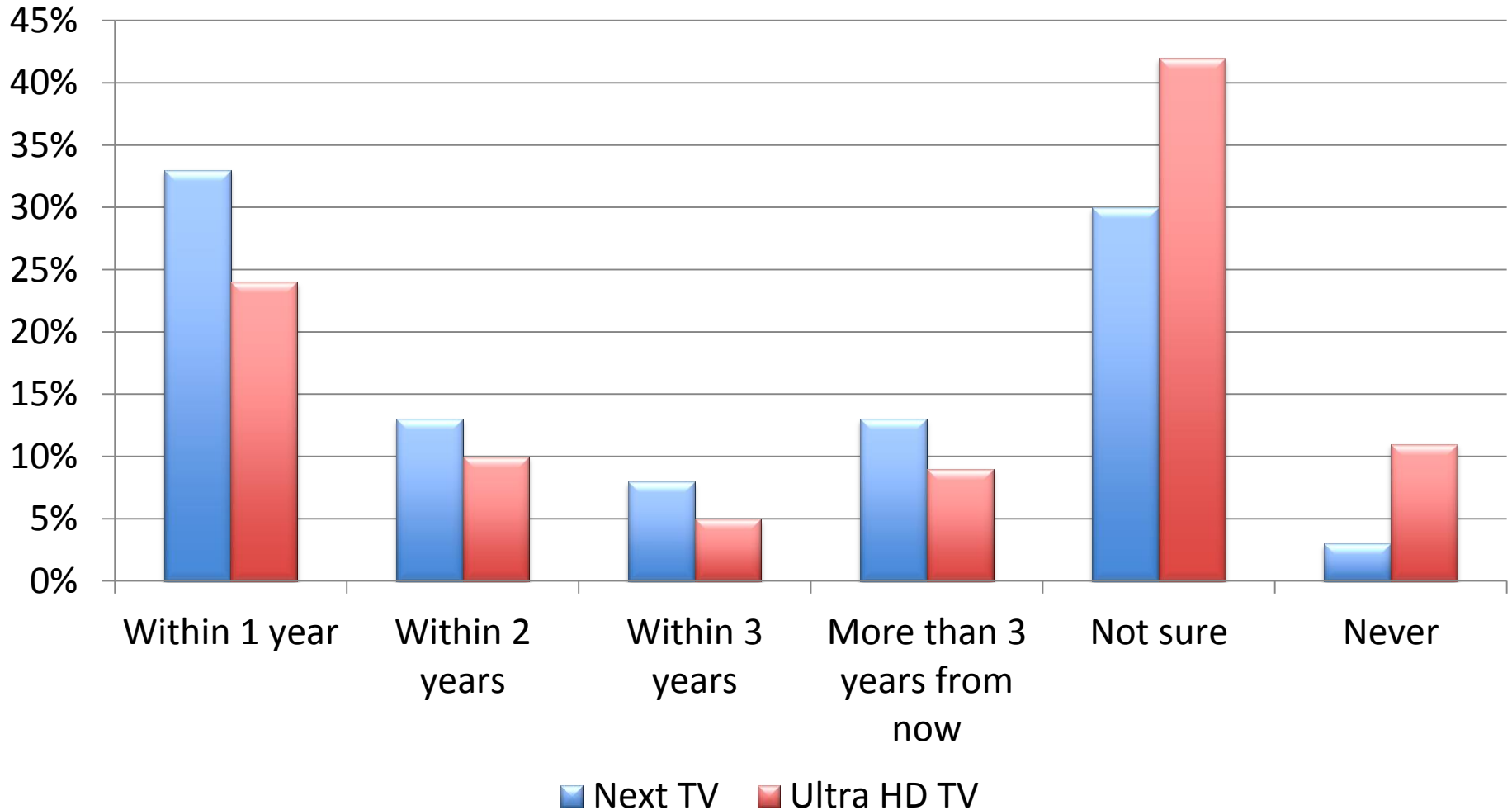
Feature	Net Important
Picture quality	88%
Price	87%
Screen size	82%
Color richness	80%
Sound quality	79%
Warranty	69%
Energy efficiency	67%
Brand reputation	64%
Familiarity with brand	56%
Weight	46%
Thickness	45%
Able to connect directly to the Internet	44%



Q: How important or unimportant are the following features when it comes to deciding on which television to purchase? (% Net Important)

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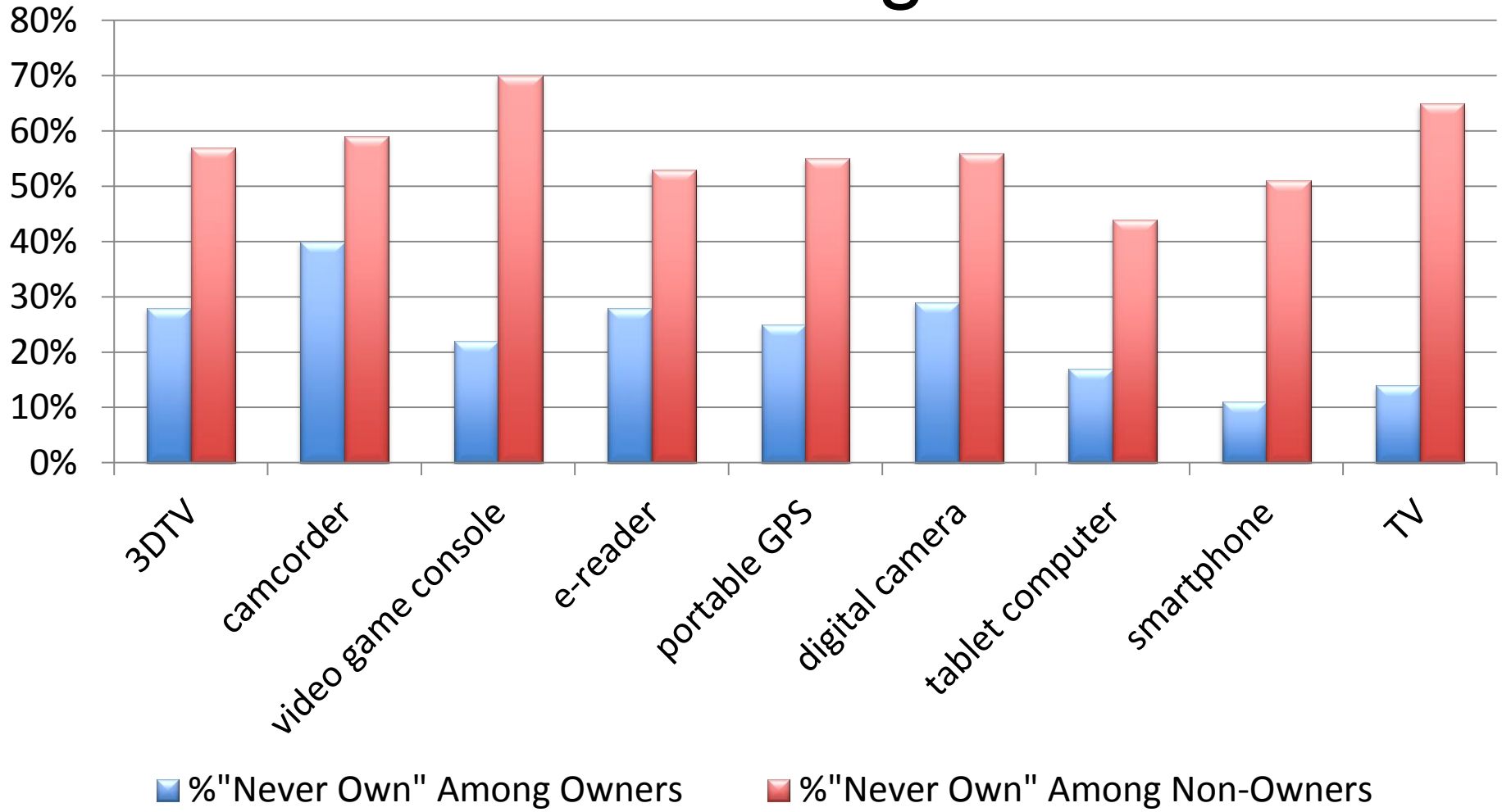
Purchase Timing as Expected



Q: When, if ever, do you expect your household will purchase....?

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How Expected Non-Owners Compare Across Categories



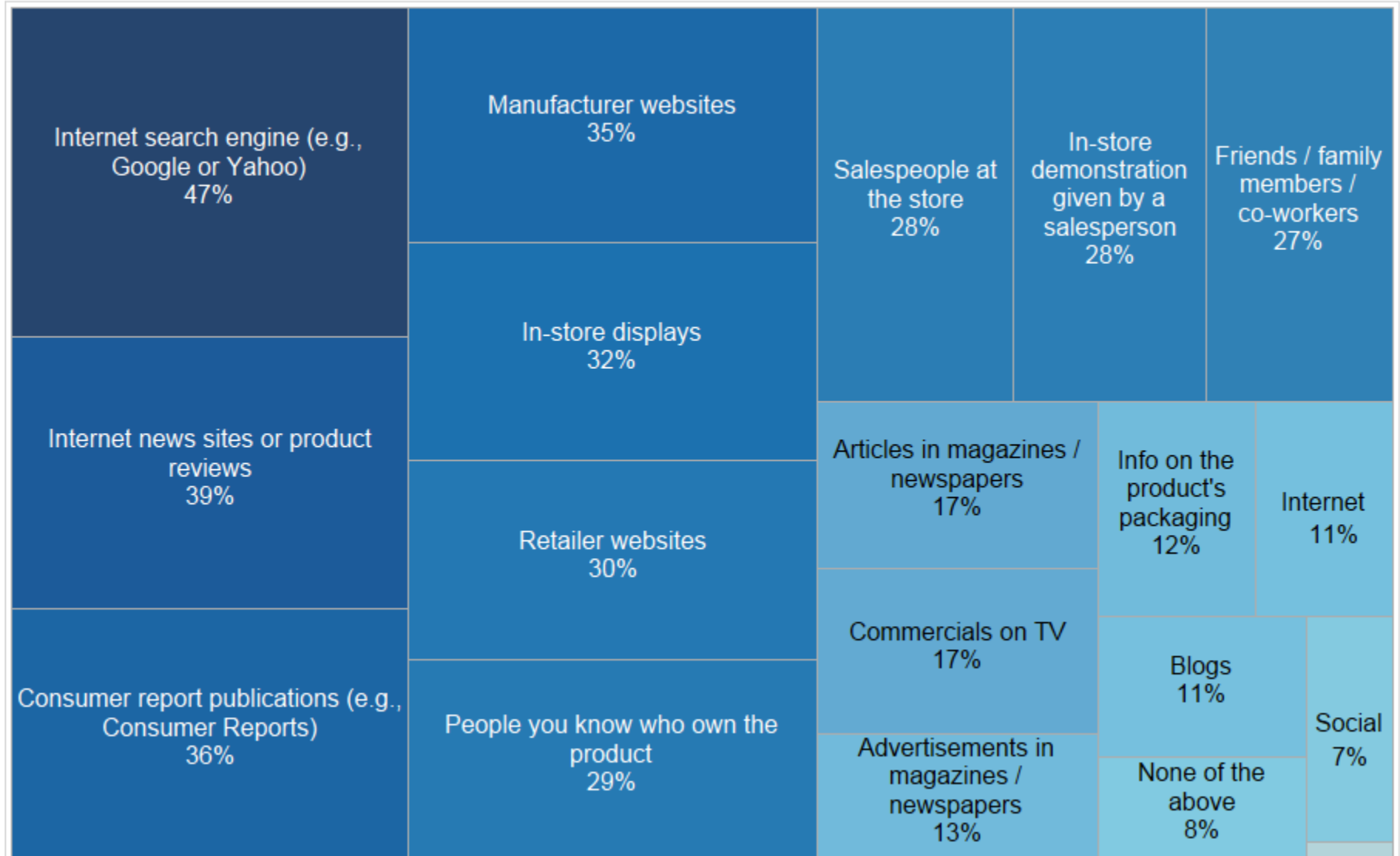
Comparing Non-Ownership Expectations Overtime

Product	2004	2005	2006	2007	2008
Portable MP3/audio player	54%	48%	49%	44%	38%
Cellular phone	32%	25%	28%	23%	20%
Portable or head-held GPS device	—	51%	58%	51%	42%
HDTV	38%	31%	35%	27%	22%
Digital Camera	38%	32%	36%	31%	28%



Where Consumers are Turning for Info

If you wanted to learn more about Ultra HD TVs, where would you go for more information?



Questions

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