

Ipsos MediaCT

The Media, Content and Technology Research Specialists



So, who wants to buy a 3D TV?

A Benchmark Study

March 2010



3D TV is here ... and awareness is high

3D TV is the next breakthrough in digital television technology. Home entertainment manufacturers like Sony, Samsung, LG and Panasonic are now mass-producing 3D TV panels. From the second quarter of 2010, Australian consumers will be faced with an even more complex choice when buying a television panel. Consumers will have to decide which size, which type (Plasma, LCD & LED), which features and whether to go 2D or 3D.

Ipsos MediaCT has conducted a benchmark consumer study on the eve of the launch of 3D TV in Australia. The study found that **awareness of 3D TV is particularly high** even though 3D TV panels aren't available in Australia. **70%** of adult Australians indicated that they had **heard of 3D TV**.

Ipsos MediaCT surveyed a representative selection of 1,039 Australian consumers in March 2010, to ascertain their views on this new technology, via the MyView online omnibus panel.



Purchase intent is a little more circumspect

Given the fact that 3D TVs aren't in stores; nor has there been any promotion we believe the level of interest in 3D TV is relatively strong. **26%** of adults indicated they were **very or extremely interested in 3D TV**. Even after being told that 3D TV would have a \$400 premium over 2D models **22%** claimed they would **definitely or probably buy a 3D TV**.

Interest varies across groups: **high within ages 18-29 (34%), males (33%) and 3D movie watchers (37%).**

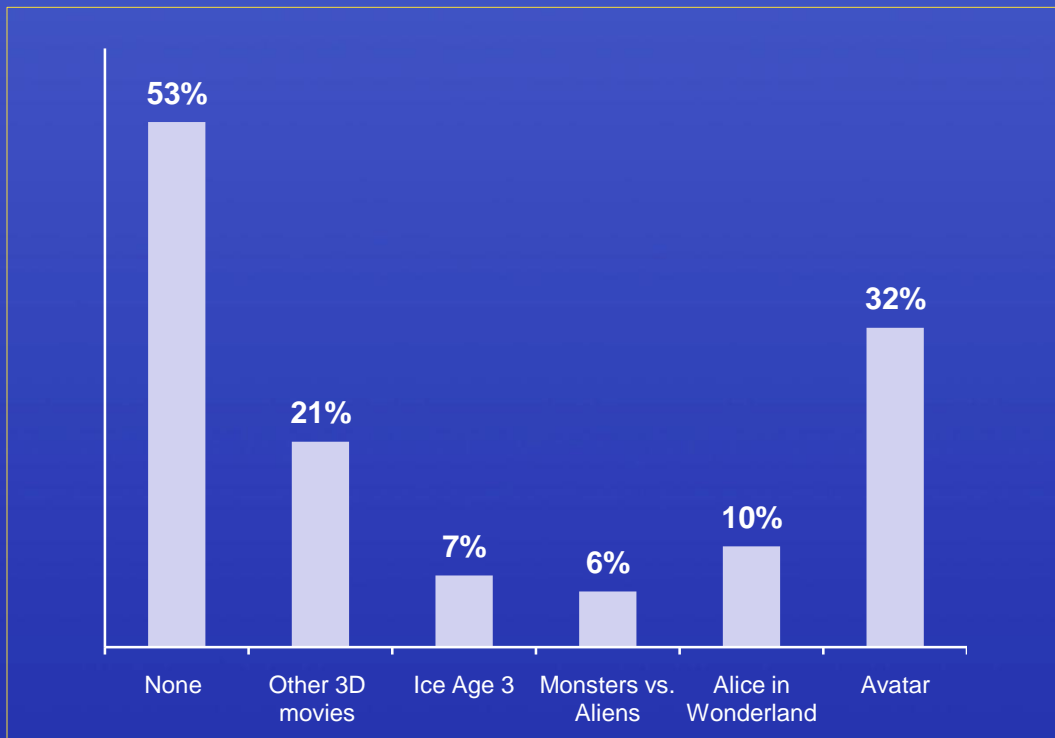


Half have seen a 3D movie at the cinema

While 48% of adults have seen a 3D movie at the cinema most had either seen Avatar (32%) or Alice in Wonderland (10%).

In our opinion the initial consumer take up of 3D technology will be driven by Hollywood's commitment to produce more 3D content (both movies and video games).

Subscription TV is more likely to be the first to offer regular 3D programming. We expect the free-to-air TV networks in Australia to wait and see.



Barriers to purchase

The status quo is satisfactory

More than three quarters (76%) are satisfied with current TV viewing quality.

Programming content is unknown

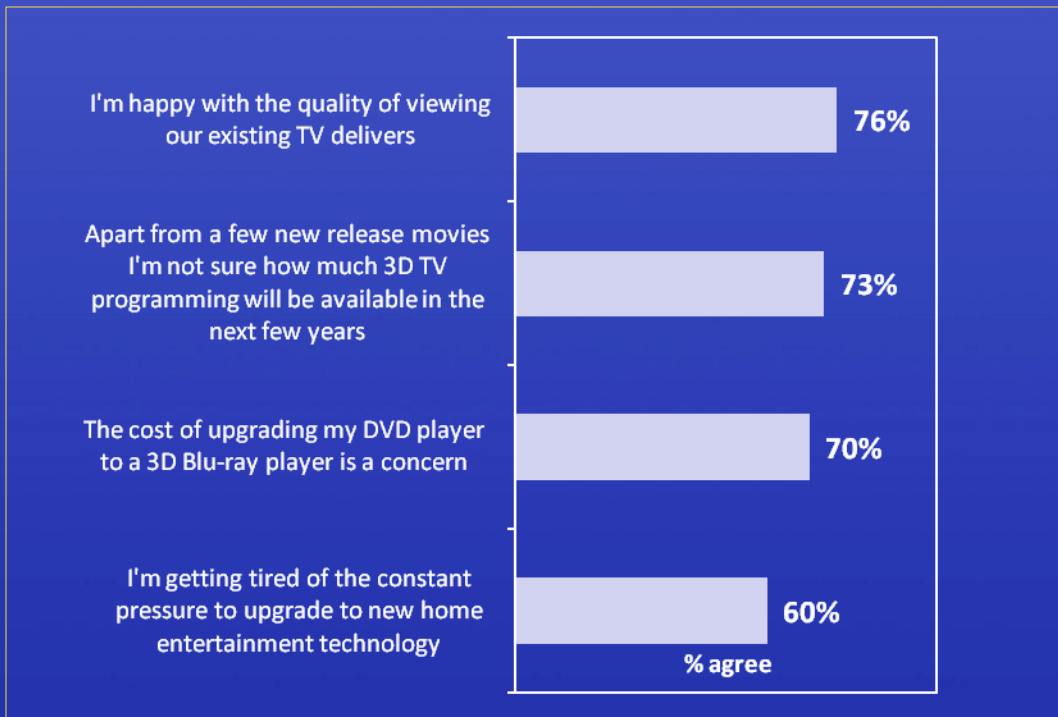
A similar proportion (73%) aren't sure how much 3D programming will be available.

Upgrade fatigue

The need to upgrade your DVD player, and on a more general level 'the constant pressure to upgrade home entertainment technology', also represent substantial areas of concern.

Other cost barriers

While the cost of purchasing sufficient 3D glasses (to enable household viewing) represents a concern for 52%, a lower proportion (42%) feel that the price of the 3D TV set itself is a barrier.



So, back to our original question. Who wants to buy a 3D TV?

Our research indicated that early adopters will be more likely to be aged 18-29 and males.

The marketing challenge for 3D TV?

Under half of adults (42%) indicated they could definitely see the benefits of 3D TV. For the balance of Australian adults, major information campaigns will be required to build understanding of 3D TV.

While 3D TV clearly offers enhanced picture quality, home entertainment technology manufacturers need to create an environment where there is an abundance of exciting 3D programming and an understanding of the benefits of 3D .

After all, if 3D TV is to occupy centre stage in our lounge rooms, and replace the relatively recent HD TV arrival, we need to know why we should switch to 3D and what we can watch.



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