Quixel Research
Home Entertainment Survey Series™

3D Internet Survey:
3D Displays and Content 2009

- **What is the overall opinion of 3D? Has it changed in the last 12 months as the 3D and Avatar buzz has increased?**
- **What are the advantages and disadvantages of 3D content/movies?**
- **What is the level of interest for 3D in the home and when is 3D TV expected?**
- **How much more are consumers willing to pay for 3D at home?**
- **How do consumers want to receive 3D content? What type content is expected on a 3D TV at home? How much more will they pay?**
- **What about those glasses?!? Will they pay for 3D glasses? How much? Is design needed?**
- **Where does brand fit into the 3D equation?**

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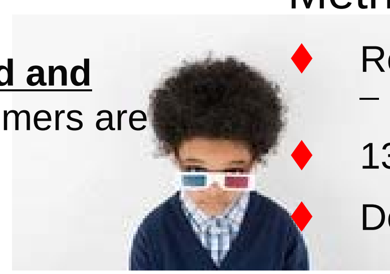
Scope/Methodology/Respondent Profile

Objectives/Scope:

- The primary aim of the ***3D Displays for Mainstream Consumers*** to determine consumers' **level of acceptance** of the current 3D technology available for home entertainment usage.
- Understand the 3D market opportunity from the **consumer perspective** vs the supply side; identify if 3D is a niche market (gimmick!) or a real opportunity.
- Identify the **drivers for purchase and pricing** for 3D TV as well as glasses; understand the landscape for glasses.
- Clarify how consumers' most desired **content delivery platforms,** timing and price acceptance levels.
- To access the effect of **brand and merchandising** when consumers are considering a 3D display.



Respondent Profile:

- 61% of respondents 25 to 54 years old; 50% male/50% female
- 30% of respondents have HHI between $50K and $75K; $8K average
- All respondents had an HDTV, with 78% owning an LCDTV
- 50% of respondents stated that they are not planning to purchase any of the typical CE products (aided) in the next 12 months; 23% mentioned purchase consideration for LCDTV and for a Blu-ray player
- The study included consumers from 49 states

Methodology:

- Respondents were required to own an HDTV – LCDTV, PDP, RPTV, Front Projector
- 13 minute, 47 question online survey
- Dec 2009 field; 1000 respondents

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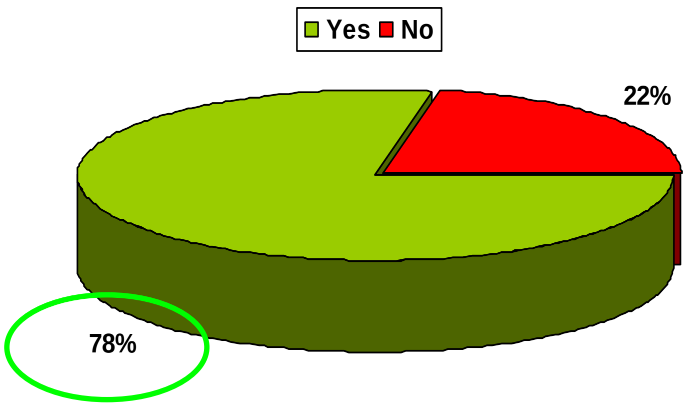
Good News: Awareness Up; Providers Won't Have To Educate

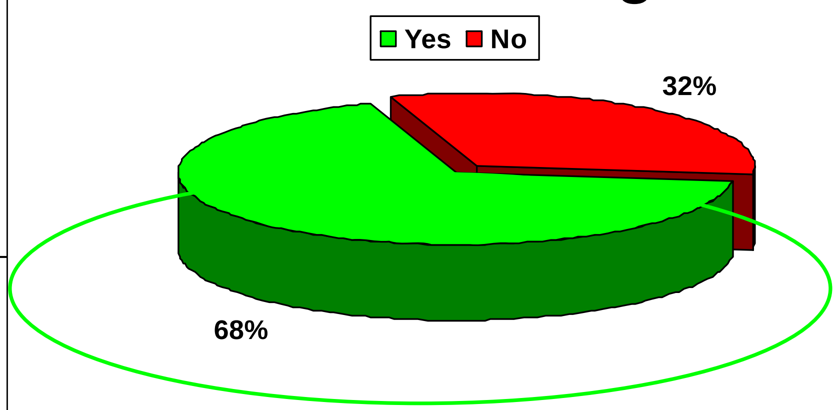
♦ 3D Product Awareness: A significant number (78%) of respondents have had a 3D experience and 68% said that they would recommend 3D to friends or family.

Awareness Level



Q13: Have you ever watched a movie in 3D? n = 1000

Recommending 3D



Q12. Would you recommend the 3D experience to a friend or family member? n = 1000

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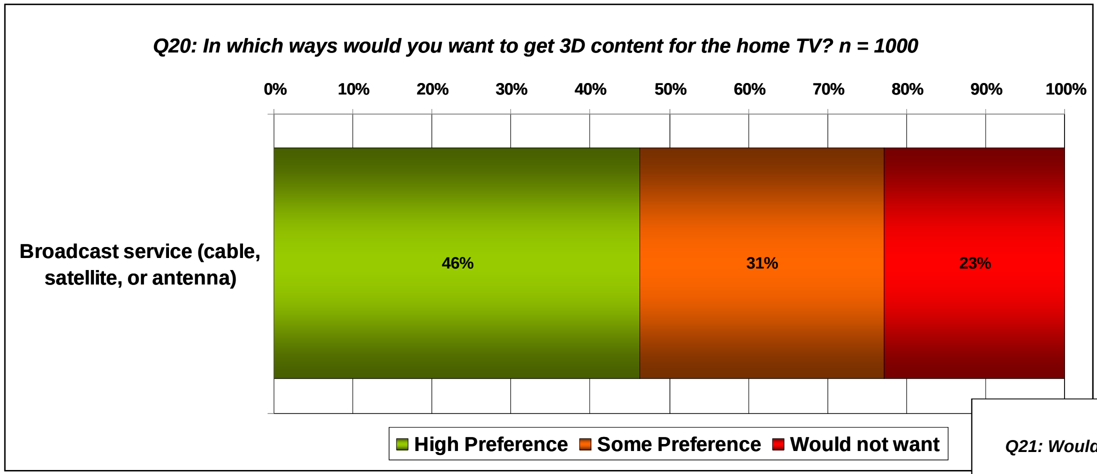
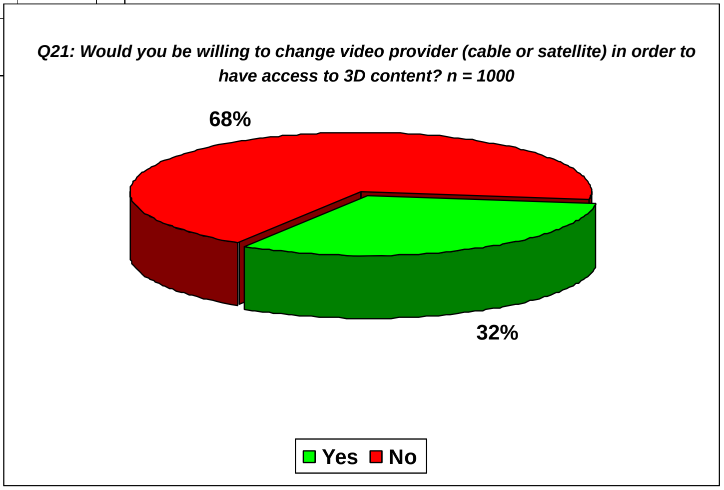
3D Content – Almost ½ want 3D via their Cable and Satellite Providers

♦3D Content: 46% of those surveyed want to receive 3D content via their cable or satellite provider or more than those who want 3D from Blu-ray/DVD; almost 1/3 would be interested in changing their content provider in order to receive 3D content.





Consumers See 3D : “extreme HD”

-Quixel Research 3D Survey Respondent, 12/09

♦ **3D Interest/Purchasing:** Half of those surveyed are interested in watching 3D at home, with those who have seen a 3D movie recently more interested in purchasing than the overall sample.

♦ **3D Timing:** Over a third of those surveyed expect 3D TV within 12 months.

♦ **3D Opinions:** Almost 2/3 stated 3D is a group experience.

♦ **3D Glasses:** Consumers are willing to pay for 3D glasses but don’t expect to pay twice as much for two pair.

♦ **3D Brands:** Comcast was in the top 3 trusted 3D brands, along with CE manufacturers Samsung and Sony.

For purchase information on the 3D study as well as the full questionnaire contact:

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