

CONSUMER TRENDS

3D Home Television Falls Flat with Buyers in U.S., Britain, Canada

While awareness of 3D TV is strong in the three countries, willingness to purchase is low.

[NEW YORK – Mar. 31, 2011] – Most Americans, Britons and Canadians are unlikely to purchase a 3D television any time soon, according to a recent Vision Critical poll.

The online survey of representative national samples shows that a negligible number of respondents in each country currently own 3D TVs. Five per cent of Americans, two per cent of Britons and only one per cent of Canadians have a 3D television at home.

However, despite limited intent to purchase, awareness of 3D TV is strong in all three countries—at least four-in-five respondents in the U.S. (81%), Britain (also 81%) and Canada (84%) have heard of household consumer 3D television.

Based on a short description, 81 per cent of American respondents said they probably or definitely would not purchase a 3D TV in the next six months. American men are more likely (17%) to purchase than women (10%).

95 per cent of Canadians responded that they would “probably” or “definitely” not purchase a 3D television in the next six months. A vast proportion of those (71%) fall into the “definitely would not buy” category. Respondents in British Columbia are the least likely to purchase a 3D TV (98% will not) while those in Ontario are more open to the technology (5% might).

Four-in-five Britons (81%) will not purchase a 3D TV in the next six months. Respondents living in London are more likely to buy compared to those in other parts of Britain. Respondents in the Midlands and Wales are the least likely to purchase a 3D TV in the foreseeable future.

KEY FINDINGS

- **81% of Americans and Britons do not plan to buy a 3D TV in the next six months.**
- **71% of Canadians will “definitely not buy” in the next six months.**
- **At least one-in-four respondents in the three countries find wearing the 3D glasses at home “inconvenient”.**

Full topline results are at the end of this release.

From March 1 to March 7, 2011 Vision Critical conducted an online survey among 1,011 Canadian adults who are Angus Reid Forum panellists, 1,006 American adults who are Springboard America panellists, and 2,007 British adults who are Springboard UK panellists. The margin of error—which measures sampling variability—is +/- 3.1% for Canada and the United States and 2.2% for Great Britain. The results have been statistically weighted according to the most current education, age, gender and region Census data to ensure samples representative of the entire adult population of Canada, the US and Great Britain. Discrepancies in or between totals are due to rounding.

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Across all three countries, the main reason cited for not planning to buy a 3D television is the high price tag. In Britain, two-in-five respondents (42%) think 3D TVs are too expensive, a sentiment shared by 39 per cent of Americans and 32 per cent of Canadians. Also, 31 per cent of Britons, 28 per cent of Canadians and 26 per cent of Americans feel it is inconvenient to wear the required 3D glasses at home.

When asked what they would be willing to pay for a 46" name-brand 3D television, Americans averaged \$753, on par with Canadians at \$785 (nearly equivalent considering the current exchange rate). Britons are willing to pay £385 (approximately \$625 U.S.) for a 40" 3D TV from a national UK retailer.

"There appears to be a significant perceived lack of value with 3D TVs among consumers in all three countries," said Matt Kleinschmit, Senior Vice President at Vision Critical. "This is not surprising given that many people may have only recently migrated to high definition TVs, and now they are being asked yet again to upgrade to a new technology. At the same time, early adopters of Plasma or LCD HD TVs discovered that there was very little HD content when they first purchased these devices, and then witnessed prices drop dramatically over the course of several years. It seems these same consumers may have learned their lesson and are sitting on the sidelines of the initial 3D TV technology wave. The inherent value proposition of these initial 3D TVs, coupled with the inconvenience of having to wear 3D glasses at home is just too much of a barrier to take the plunge."

Of the very small group of respondents who will "probably" or "definitely" buy a 3D television in the next six months, most will elect to buy a Sony, Samsung, or LG—or whichever brand is the best deal at the time they go to purchase.

About a third of Canadians (35%) who plan to buy a 3D TV will choose LG, 17 per cent will select Sony and 21 per cent will go with whichever brand provides the best deal. In the U.S., 32 per cent of prospective buyers will acquire a Sony model, 14 per cent plan to buy Samsung and 16 per cent will go with the best deal. In Britain, respondents who plan to buy a 3D TV will mostly go for the best deal (35%), followed by 23 per cent opting for Sony and 14 per cent choosing Samsung.




More than half of Britons who are planning to buy a 3D TV in the next six months will do so from whichever retailer has the best deal at the time they go to purchase (53%)—12 per cent will purchase from Currys and 11 per cent will buy at Argos. In Canada, 37 per cent plan to buy at Future Shop and nine per cent will go to Costco—more than a third (35%) will go wherever the deals are best. American shoppers prefer Best Buy (28%) or Wal-Mart (22%) if they plan to buy a 3D TV in the next six months. One-in-five respondents in the U.S. will be seeking the best deal, regardless of the retailer (20%).




Nearly one third of Canadians own a high definition flat screen LCD (29%) while one-in-five have a non-HD flat screen LCD (21%) and nearly one quarter (24%) have a CRT tube-style television in their home. CRT tube TVs (31%) and HD flat screen LCD TVs (30%) are most popular in the US. About one-in-five Americans (17%) have a non-HD flat screen LCD. In Britain, three-in-ten respondents have a flat screen HD TV at home (30%) while 26 per cent have a non-HD LCD, and 17 per cent own a CRT tube television.

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3D TV – Comparison			
What type of television(s) do you currently have in your household? (select all that apply)			
	Canada 	Great Britain 	United States 
Flat Screen LCD	21%	26%	17%
Flat screen High Definition LCD	29%	30%	30%
Rear-Projection LCD	4%	2%	6%
Rear-Projection High Definition LCD	4%	1%	6%
CRT Tube	24%	17%	31%
Flat screen Plasma	8%	8%	6%
Flat screen High Definition Plasma	10%	9%	8%
Flat screen High Definition LED	10%	14%	13%
3D Flat screen High Definition LCD	1%	2%	5%
Other	6%	3%	7%
None of the above	12%	9%	9%

3D TV – Comparison			
<p>Many television manufacturers are now offering 3D-ready televisions for consumer household use. These televisions range in size from 40” to 65” and range in price at national retailers from \$1,200 to \$6,000. These televisions display all regular and HD programming, plus 3D broadcasts that require the viewer to wear 3D glasses. 3D movies are also available which require a 3D-ready Blu-Ray player.</p> <p>Before today, had you ever heard of household consumer 3D televisions?</p>			
	Canada 	Great Britain 	United States 
Yes	84%	81%	81%
No	16%	19%	19%

(*This description was amended to be accurate in each of the three countries)


3D TV – Comparison

Based on the description provided, how likely would you be to purchase a 3D television in the next six months?

	Canada 	Great Britain 	United States 
Definitely would buy	1%	2%	3%
Probably would buy	3%	8%	11%
Probably would not buy	24%	29%	25%
Definitely would not buy	71%	52%	56%
Not sure	2%	8%	6%


3D TV – Canada (by Province)

Based on the description provided, how likely would you be to purchase a 3D television in the next six months?

	Canada 	BC	AB	MB/SK	ON	PQ	ATL
Definitely/probably would buy	4%	1%	1%	2%	5%	4%	4%
Definitely/probably would not buy	95%	98%	95%	96%	93%	95%	91%
Not sure	2%	1%	4%	2%	1%	1%	5%

3D TV – United States (by Gender)

Based on the description provided, how likely would you be to purchase a 3D television in the next six months?


	United States 	Male	Female
Definitely/probably would buy	14%	17%	10%
Definitely/probably would not buy	81%	76%	85%
Not sure	6%	7%	5%

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3D TV – Great Britain (by Region)

Based on the description provided, how likely would you be to purchase a 3D television in the next six months?

	Great Britain 	London	South of England	Midlands and Wales	North	Scotland
Definitely/probably would buy	10%	13%	10%	9%	10%	8%
Definitely/probably would not buy	81%	74%	83%	84%	80%	82%
Not sure	8%	13%	7%	7%	10%	10%




3D TV – Comparison

What is the main reason you would not purchase a 3D TV for your home?

	Canada 	Great Britain 	United States 
3D televisions are too expensive	32%	42%	39%
Inconvenient (do not want to wear the required 3D glasses at home)	28%	31%	26%
Not suitable for groups (requires the purchase of additional glasses)	4%	2%	2%
Not enough 3D programming available in my area	9%	6%	7%
Other	27%	19%	25%

3D TV – Comparison




The average price for a 46" brand name 3D TV is currently around \$2,000*. How much would you be willing to pay for a 3D TV meeting this description?

	Canada 	Great Britain 	United States 
Median	\$785 CAD	£385	\$753 USD

(*This description was amended to be accurate in each of the three countries. 46" 3D flat screen TV in US for \$1,600USD, 46" in Canada for \$2,000CAD, 40" in Great Britain for £800.)

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3D TV – Comparison			
What brand of 3D television are you most likely to purchase?			
Respondents who answered “definitely” or “probably” will purchase a 3D TV in the next six months.	Canada 	Great Britain 	United States 
Samsung	10%	14%	14%
Panasonic	11%	12%	12%
LG	35%	6%	4%
Sharp	0%	1%	6%
Philips	0%	2%	2%
Toshiba	2%	2%	6%
Sony	17%	23%	32%
Hitachi	3%	2%	1%
Mitsubishi	-	-	5%
Vizio	-	-	2%
Whichever brand is the best deal at the time I go to purchase	21%	35%	16%
Another brand not listed here	1%	2%	1%

3D TV – Great Britain	
At which retailer are you most likely to purchase a 3D television?	
Respondents who answered “definitely” or “probably” will purchase a 3D TV in the next six months.	Great Britain 
Argos	11%
Tesco	6%
Currys	12%
Dixons	1%
Best Buy	2%
Debenhams Extra	2%
Comet	8%
Whichever retailer has the best deal at the time I go to purchase	53%
Another retailer not listed here	5%

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3D TV – Canada	
At which retailer are you most likely to purchase a 3D television?	
Respondents who answered “definitely” or “probably” will purchase a 3D TV in the next six months.	Canada 
Best Buy	4%
Future Shop	37%
Sears	5%
London Drugs	4%
Wal-Mart	2%
Costco	9%
Real Canadian Superstore / Loblaw’s	2%
Whichever retailer has the best deal at the time I go to purchase	35%

3D TV – United States	
At which retailer are you most likely to purchase a 3D television?	
Respondents who answered “definitely” or “probably” will purchase a 3D TV in the next six months.	United States 
Best Buy	28%
Sears / Kmart	5%
Walmart	22%
Target	3%
Radio Shack	3%
Sony Store	5%
Costco	6%
Sam’s Club	4%
Whichever retailer has the best deal at the time I go to purchase	20%
Another retailer not listed here	4%

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For Immediate Release
Three Country Consumer Poll

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About Vision Critical®

Vision Critical is a global research and technology firm that creates software and services solutions for over 600 clients, including one third of the world's top 100 brands. The company has offices across North America, Europe and Australia as well as a Global Partner Program that provides other research companies and consultants with access to top-of-the-line technology. Its Sparq™ product is the most widely adopted community panel platform on the planet.

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**For more information, please contact
our spokesperson listed in the footnote.**

**Copies of this poll are available on our website:
<http://www.visioncritical.com/>**

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