

## U.S. TV Consumer Preference Analysis

# TV Vendors Keep Promotions Going to Spur Demand

By Riddhi Patel, Principal Analyst and Tina Tseng, Analyst

### Data Dimensions

#### Update Frequency

- Consumer purchase preferences are captured monthly

#### Measures

- Brand, model, retailer shares unit shares, sell-out prices
- Feature/service, preference, buying influences rank ordering
- Demographics (household income, gender, region, etc.)

#### Regions, Markets

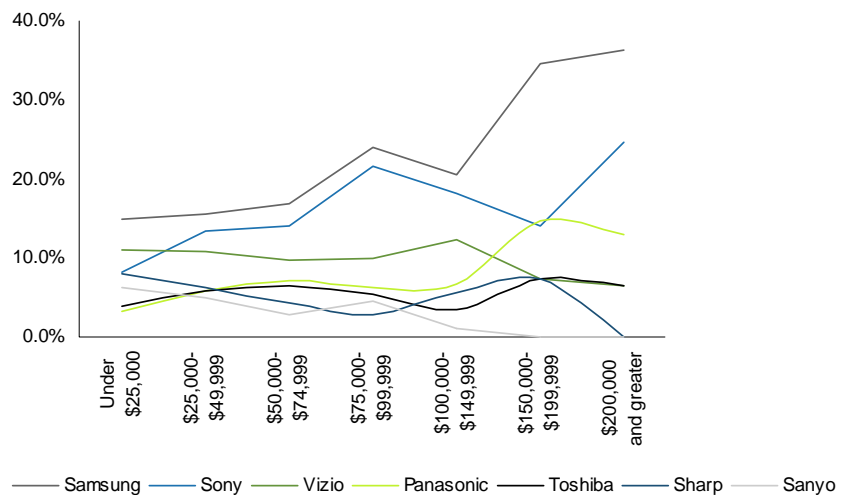
- United States

### Companies Covered – Matrix of

- Over 30 TV brands
- Over 30 retailers

iSuppli's U.S. Television Consumer Preference Study is a survey based research and analysis studying consumer preferences and purchase patterns in the US TV market. It endeavors to help answer the questions around who is buying what, where consumers are buying from and why. In addition, sell-in, inventory shifts and a market forecast are presented to provide the most comprehensive market view possible. The underlying data is based on a proprietary on-line survey process. The respondents answer questions about what brands they buy, what retailers they bought from, feature preferences, buying motivators plus other rotating questions. The deliverables, which are available monthly or quarterly are Excel pivot tables for the data and a PowerPoint presentation for the analysis.

Popular Flat-panel TV Brands by HH Income



### Critical Questions Answered

- What do consumers prefer in terms of brands, technology type, features and why?
- What are the top criteria consumers look for when purchasing a TV?
- What is motivating consumers to buy a new TV?
- What is the profile of consumers at different stores?
- What are consumers' perceptions on the different TV brands?
- How important are warranty and installation services?
- Who is buying what by demographic or psychographic segment?
- Who is winning and losing with the various market segments, demographic segments, retailers, and most importantly why?

### Who Should Read This?

- Television set brands
  - Regional and headquarter sales and marketing
  - Product management
- Retailers
  - Purchasing
  - Marketing
- Value chain marketing and sales
  - Semiconductor suppliers
  - Display suppliers
  - Other component suppliers
  - Contract manufacturers (EMS, ODM)
- Financial community
  - Investment managers
  - Analysts
- Venture capital and private equity firms

### Lead Analyst

#### Riddhi Patel, Principal Analyst

Riddhi is responsible for the television and plasma display panel (PDP) analysis. The scope will include creating and implementing industry surveys, market sizing and forecasting, and evaluating the impact of broad market factors on television and PDP demands.

Riddhi came to iSuppli with extensive high-profile marketing, market research, strategy formulation and analysis and product marketing experience from leading technology companies and research firms. She most recently worked as Senior Market Intelligence Manager at a Silicon Valley venture capital firm where she was responsible for the strategic marketing, market research and business development initiatives for the portfolio companies. As a part of a cross-functional team, she was involved in market and product due-diligence, product definition and research in addition to analysis of emerging technologies. Riddhi previously held various analyst positions at Gartner/Dataquest and AberdeenGroup.

Riddhi earned an MBA in Marketing and International Business and Bachelor of Science in Physics, from South Gujarat University and Maharaja Sayajirao University.

#### Tina Tseng, Analyst

At iSuppli, Tina is responsible for the analysis and forecasting of trends and dynamics of the consumer electronics sales channels.

Prior to joining iSuppli, Tina worked as a Product Management Specialist at Sampo Corporation, a home appliance and consumer electronics manufacturer and distributor, where she was responsible for the channel and product management of the Maxent brand of HDTVs.

Tina holds a Masters degree in Communication Management from the University of Southern California and a Bachelor of Arts from National Taiwan University.

### Deliverables (Monthly or Quarterly)

- Excel Pivot Table with compiled survey data, market sizings, and forecast
- PowerPoint presentation with summary graphs and analysis of market activity

### Database Index

- Consumer Survey Response Excel Pivot Table
  - Household technology penetration
  - Buying motivators by demographic (upgrading technology, buying for another room, back-to-school, etc)
  - Ranked buying criteria and feature preference by demographic (brand name, store availability, price, picture quality, etc)
  - Room placement of set, installation service take up, extended warranty take up
  - Responder demographics: household income, age, US region, household composition (adults and children)
  - Ad-hoc topic questions
- Market Roll-up Updated Quarterly (in Excel Workbook)
  - Sell-in/sell-out actuals and forecast
  - Inventory level changes

### Methodology

- A proprietary on-line buyer panel and real time survey process is employed to gather the sell-out, retailer, preference, and behavior data
  - Consumers are asked what they bought, where they bought, what they paid, and why they did what they did
  - Forward looking preference questions are asked as well
- Statistically valid sampling approach is used by tapping into a 2 million person, continually refreshed, panel pool
  - In order to reach difficult demographic segments real-time samples (non-panel) are mixed in as well
- Each month over 20,000 households are contacted where 700-1000 completed surveys are captured for televisions

- iSuppli has developed proprietary response scrubbing techniques to ensure the highest validity with our samples
- This research is further enhanced by tapping into iSuppli's continuous technology industry research that tracks ship-in, price tracking, and other value chain parameters