

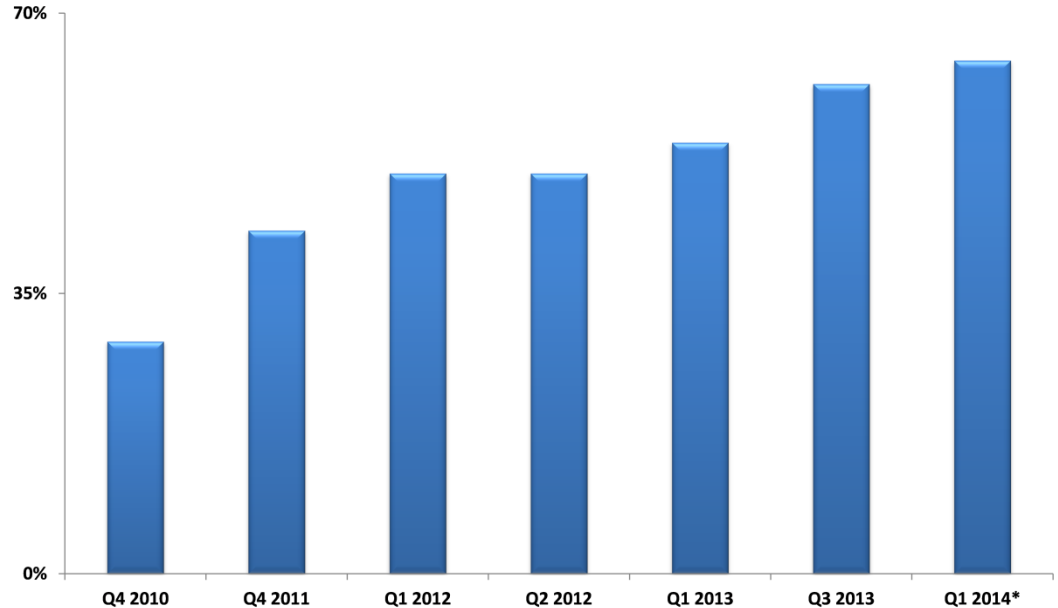
By **John Barrett**, *Director, Consumer Analytics*; **Barbara Kraus**, *Director of Research*; **Yilan Jiang**, *Manager of Consumer Research*; and **David Mitchel**, *Research Analyst, Parks Associates*

SYNOPSIS

360 View: CE Adoption and Trends analyzes the market for consumer electronics devices with an emphasis on devices capable of connecting to the Internet to access online content (smart TVs, streaming media devices, etc.). It offers an overview of CE market trends and an assessment of the flat-panel TV market in particular along with a deep-dive analysis of “Big CE Spenders”—a market segment that accounts for a disproportionate amount of all CE expenditure. It also investigates the market for connected CE devices including a comparison of content usage and spending patterns across devices. Particular attention is given to the Google Chromecast device.

Households with Internet-Connected CE (2010-2014)

(U.S. broadband households with a smart TV, Blu-ray player, game console, connected STB and/or a digital media receiver that is/are connected to the Internet)



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* First year that included Google Chromecast

ANALYST INSIGHT

“The market for streaming media devices is heating up thanks to new offerings from Google and Amazon. What remains to be seen is what role these devices will play with respect to flat-panel TVs—whether they will fade from the market or establish a more enduring presence.”

— **John Barrett**, *Director, Consumer Analytics, Parks Associates*

About the Research

Previous Research:

- Streaming CE and Content Purchasing Habits (Q1/14)
- Consumer Segmentation: The Big CE Spenders (Q3/13)
- Connected TV: Trends and Innovation (Q3/13)
- 2012 Year in Review: CE Purchases (Q1/13)

Key Findings

Recommendations

CE Adoption and Purchases:

- Consumer Electronics Adoption (2009-2014)
- Home Entertainment Product Adoption (2009-2014)
- Audio Accessories or Miscellaneous Product Adoption (2010 - 2014)
- Percentage of Broadband Households Buying Consumer Electronics in Year (2007 - 2013)
- Average Annual Spending on Consumer Electronics (2007 - 2013)
- Average Number of CE Product-Categories Purchased (2011 - 2013)
- Number of CE Products Purchased in Year (2011 - 2013)
- Annual CE Purchases: Computers & Mobile Devices in Year (2007-2013)
- Annual CE Purchases: Home Entertainment Products in Year (2007 - 2013)
- Annual CE Purchases: Accessories in Year (2007-2013)
- Average Selling Price of Computers, Tablets & Home Network (2008 - 2013)
- Average Selling Price of Home Entertainment Devices (2008 - 2013)
- Average Selling Price of Mobile Devices (2008 - 2013)
- Average Selling Price of Accessories (2008 - 2013)
- Implied Revenues from CE Purchases: Top Categories (2008-2013)
- Computing Devices: Top Five Brands Purchased in Year (2010 - 2013)
- Home Entertainment Devices: Top Five Brands Purchased in Year (2010 - 2013)
- Portable/Gaming Devices: Top Five Brands Purchased in Year (2010 - 2013)
- Accessories or Miscellaneous Products: Top Five Brands Purchased (2010 - 2013)
- % of Buyers Receiving as a Gift (2011 - 2013)
- Purchase Location for Products (Q1/14)
- Reason for Purchase (Q1/14)

CONTENTS

- Purchase Trigger (Q1/14)
- Online Purchases: Computers & Mobile Devices (2008 - 2013)
- Online Purchases: Home Entertainment Devices (2008 - 2013)
- Online Purchases: Accessories or Miscellaneous Products (2008 - 2013)
- Method of Purchase (Q1/14)
- Top 3 Purchase Considerations: Brand (Q1/14)
- Top 3 Purchase Considerations: Features (Q1/14)
- Top 3 Purchase Considerations: User Reviews (Q1/14)
- Top 3 Purchase Considerations: Professional Reviews (Q1/14)
- Top 3 Purchase Considerations: Appearance (Q1/14)
- Top 3 Purchase Considerations: Recommendations (Q1/14)
- Top 3 Purchase Considerations: Warranty (Q1/14)
- Top 3 Purchase Considerations: Technical Support (Q1/14)
- Top 3 Purchase Considerations: Retailer (Q1/14)
- Purchase Intentions (Q1/14)

New TV Technologies:

- Familiarity with TV Innovations (Q1/14)
- Smart TV Penetration and Connection (2010 - 2014)
- 3D TV Ownership (2010 - 2014)
- 4K/Ultra TV Adoption (Q1/14)
- Purchase Intentions for TV Innovations (Q1/14)
- Smart TV Purchase Intention Among Flat Panel TV Likely-Buyers (2010 - 2014)

Big CE Spenders:

- Typical Amount Spent on Electronics (Q1/14)
- 2013 CE Buyers by CE Spending Segments (Q1/14)
- Average CE Expenditure by CE Spending Segments (Q1/14)
- Average Number of CE Devices Purchased in 2013 by CE Spending Segments (Q1/14)
- Average Device Cost by CE Spending Segments (Q1/14)
- Average Price Paid for Key CE Products by CE Spending Segments (Q1/14)
- Breakdown of CE Expenditures by CE Spending Segments (Q1/14)
- Device Adoption by CE Spending Segments (Q1/14)
- 2013 CE Purchases by CE Spending Segments (Q1/14)

CONTENTS

- % of CE Buyers Making 2013 Holiday Purchases by CE Spending Segments (Q1/14)
- Future Purchase Intention by CE Spending Segments (Q1/14)
- Reason for Tablet Purchase by CE Spending Segments (Q1/14)
- Reason for Laptop Purchase by CE Spending Segments (Q1/14)
- Reason for Flat Panel TV Purchase by CE Spending Segments (Q1/14)
- Big CE Spenders by Income Level & Children at Home (Q1/14)

Low Income Big CE Spenders:

- Household Income by CE Spending Segments (Q1/14)
- Age Breakdown of Low-Income Big CE Spenders (Q1/14)
- Average # of CE Products Purchased: Low-Income Big CE Spenders vs. All Big CE Spenders (Q1/14)
- CE Purchases: Low-Income Big CE Spenders vs. All Big CE Spenders (Q1/14)
- Device Ownership: Low-Income Big CE Spenders vs. All Big CE Spenders (Q1/14)

Connected CE Devices:

- U.S. Households with Internet-Connected CE (2010 - 2014)
- PC - to - TV Connection (2009 - 2014)
- % of Broadband HH Connecting CE Devices to Internet (2010 - 2014)
- Brand of Streaming Media Player Used Most Often (Q1/14)
- Brand of Streaming Media Player Used: Roku vs. Apple TV
- U.S. Households with Internet-Connected CE by Age (2012 - 2014)
- U.S. Households with Internet- Connected CE by Pay-TV Subscription (2010 - 2014)
- Most Popular Video Services for Connected CE Devices (Q1/14)
- Additional Video Services Used on Connected CE Devices (Q1/14)
- Monthly Expenditure On Online Media Content (Q1/14)
- Types of Video Content Watched on Connected CE (Q1/14)
- Location of Most Frequently Used Connected CE Device (Q1/14)

Connected CE Devices: Differences in Device Usage:

- Total Numbers of Connected CE Devices In Use (Q1/14)
- Ownership of Smart Devices and Connection Rates (Q1/14)
- Most Frequently Used Connected CE Device (Q1/14)
- Most Commonly Used Connected CE Devices (Q1/14)
- Reason for Using Connected CE Device More Than Others (Q1/14)

CONTENTS

- Reason for Using Connected CE Device More Than Others (Q1/14)
- Video Content Watched on Most Used Connected CE Device (Q1/14)
- Location of Most Used Connected CE Device (Q1/14)
- Average Number of Hours Spent Accessing Online Video Content (Q1/14)
- Online Video Content Accessed on Smart TVs (Q1/14)
- Online Video Content Accessed on Connected Blu-ray Players (Q1/14)
- Online Video Content Accessed on Connected DVRs (Q1/14)
- Online Video Content Accessed on Connected Gaming Consoles (Q1/14)
- Online Video Content Accessed on Streaming Media Players (Q1/14)
- Monthly Expenditure Using Smart TVs to Access Media Content (Q1/14)
- Monthly Expenditure Using Connected Blu-ray Players to Access Media Content (Q1/14)
- Monthly Expenditure Using Connected DVRs to Access Media Content (Q1/14)
- Monthly Expenditure Using Connected Gaming Consoles to Access Media Content (Q1/14)
- Monthly Expenditure Using Streaming Media Players to Access Media Content (Q1/14)
- Monthly Expenditure Using Google Chromecast to Access Media Content (Q1/14)
- Average Monthly Content Expenditure for Most Used Device (Q1/14)

Google Chromecast:

- Google Chromecast & Streaming Media Player Adoption Rate (Q3/13 & Q4/13)
- Demographic Profile of Google Chromecast Owners
- % of Connectable Devices Connected (Q1/14)
- Monthly Google Chromecast Use (Q3/13 - Q1/14)
- Google Chromecast Use (Q4/13-Q1/14)
- Devices Used with Google Chromecast (Q3/13-Q1/14)
- Google Chromecast Apps (Q1/14)
- Google Chromecast Online Video Sources (Q3/13-Q1/14)
- Method of Accessing Google Chromecast Video Content (Q1/14)
- Likelihood of Purchasing Google Chromecast & Streaming Media Player (Q4/13 & Q1/14)

Additional Research from Parks Associates



CE Adoption and Trends

360 VIEW

SERVICE: CONNECTED CE AND PLATFORMS

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ATTRIBUTES

Parks Associates
15950 N. Dallas Pkwy
Suite 575
Dallas TX 75248

TOLL FREE 800.727.5711

PHONE 972.490.1113

FAX 972.490.1133

parksassociates.com

sales@parksassociates.com

Authored by John Barrett, Barbara Kraus, Yilan Jiang, and David Mitchel
Executive Editor: Tricia Parks

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