

4K Today: Bringing Ultra HD to Market

SPECIAL RESEARCH

1Q 2014

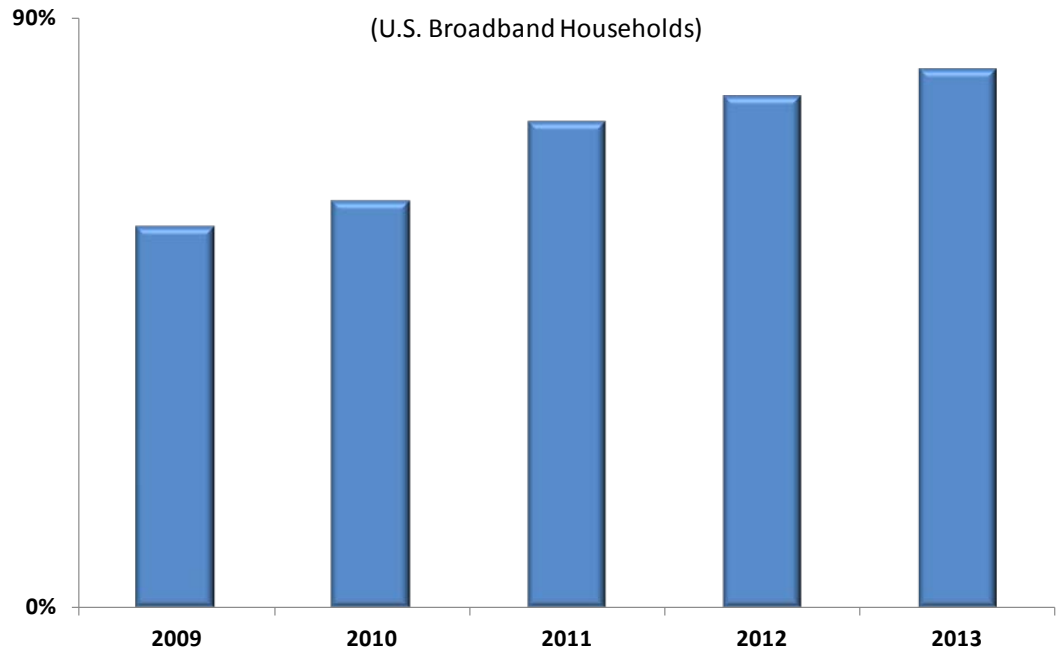
By **Barbara Kraus**, *Director, Research*; and **Brett Sappington**, *Director, Research*, Parks Associates

SYNOPSIS

This special research analyzes the impact of 4K technology on service and content providers and CE manufacturers. It provides an analysis of the TV technology market, including the importance of 4K content to CE manufacturers as well as delivery issues via OTT and pay-TV services. The research also offers a detailed comparison of 4K to previous rollouts of 3D and HD technology.

Flat-Panel TV Penetration

(U.S. Broadband Households)



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ANALYST INSIGHT

"The price curve for 4K TVs will be similar to that of HDTVs but at a slightly faster rate of decline. While 4K is priced at the high end now, it will decline to mass-market levels over the next two to three years. Like flat-panel HDTVs, 4K TV prices will continue to decline as unit sales volume increases."

— **Barbara Kraus**, *Director, Research*, Parks Associates

CONTENTS

Comparison to 3D TV and HDTV Rollouts

- Requirements, Benefits, Content, and Obstacles
- HDTV Rollout
- 3DTV Rollout
- Ultra HD / 4K TV Rollout

Content Production / Supply

- The State of 4K Professional Production
- Production: Film Industry

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CONTENTS

- Production: Consumer 4K
- Physical Media and 4K

Services:

- OTT 4K services
- Operator 4K services
- 4K Content Services and Media

Impact on Delivery Networks

- Bandwidth Considerations and Linear TV Delivery
- 4K and HEVC (H.265)
- Trials of 4K and HEVC
- Google's Alternative to HEVC
- The Impact of OTT-based Delivery

Televisions

- 4K TV Pricing
- Comparison to HD TV Pricing
- 4K TV Replacement Cycles
- Additional 4K TV Growth Factors
- Streaming Capabilities of the TV
- Revelations from 2014 CES: 4K TV Enhancements
- Revelations from 2014 CES: 4K User Interfaces

Other CE Devices

- Media Players
- Projectors
- Laptops
- Mini PCs
- Computer Monitors

Conclusions

- Analyst Assessments
- 4K Services
- 4K TV adoption
- Potential Benefits for Broadband Providers

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