



Applied Materials 2014 DISPLAY FACT SHEET INTERNATIONAL SURVEY

DETAILED SURVEY FINDINGS

Cracked screens on mobile devices are a problem everywhere.

In the U.S., one in every ten respondents (10%) said that their mobile device screen is cracked in some way. In India, this percentage climbed to one in four (25%).

Mobile device owners in China (96%), the U.S. (92%) and India (88%) wish their phones had drop, scratch and crack resistant screens.

Durability was ranked the most important feature in China (24%), and was ranked second only to battery life in the U.S. (23%).

Futuristic screens are also of interest to consumers, especially screens that fold or bend.

Foldability for mobile device displays was the most appealing feature for users in China (83%), India (82%) and the U.S. (60%).

New screen form factors are a draw for televisions, too. China and India (both 94%) showed the greatest interest in a paper-thin TV that can hang on a wall like a picture frame for a more immersive experience.

In India (90%) and China (75%), consumers prefer to own devices that look different from everyone else's.



However, "keeping up with the Joneses" is a worldwide trait. Consumers in India (53%), China (29%) and the U.S. (21%) feel the need to compete by purchasing a bigger, faster or better version of devices purchased by their neighbors.

In the future, having longer battery life will be just as important as having a strong screen.

Mobile device owners in India (99%), the U.S. (98%), and China (97%) rank having an extended battery life as the top desired feature for future mobile devices. Having a strong and crack resistant screen comes in a close second for all three countries (96% everywhere).



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DETAILED SURVEY FINDINGS, CONTINUED

Resolution and screen size drive new TV purchases.

While larger screens were most important to those in India (35%) and the U.S. (29%), Chinese consumers (40%) chose the resolution of the screen to be most important when in the market for a new TV.

Indian (56%) and Chinese (46%) consumers are also more likely than U.S. consumers (34%) to be currently considering the purchase of a new flat screen TV.

Bigger is better.

Respondents agreed that bigger screens are better than smaller for TVs in India (88%), U.S. (63%), and China (59%), but differed in their definition of a “big” TV. The largest percentage of consumers surveyed in the U.S. (35%) and China (25%) indicated that TVs between 50-59 inches are considered large, while in India, the largest percentage of respondents (25%) selected 60-69 inches.

The U.S. remains a more TV-centric nation than India or China.

Households in the U.S. have 3x more flat screen TVs as the others, and watch more hours of TV per day.

In the U.S., one in seven respondents (13%) have four or more flat screen TVs in their household. Significantly fewer respondents in China (2%) and India (2%) have as many TVs.

However, on average, consumers in China and India spend more time watching TV on tablets (4.2 hours and 3.8 hours, respectively) than consumers in the U.S. (3.6 hours).

RESEARCH OBJECTIVE

Understand consumer opinions and preferences in the U.S., China and India about displays for mobile devices and flat screen TVs.

METHODOLOGY

Applied Materials, Inc. commissioned Survey Sampling, Inc. (SSI), a leading global supplier of custom research and online panels, to conduct an online survey polling 3000 smartphone/tablet and flat screen TV owners. The survey was conducted between June 3 and June 11, 2014 in China, India and the U.S. SSI fielded the survey and used national online panels of qualified consumers to conduct 1000 interviews in each country. In the U.S. and China, weighting was then employed to balance demographics so that the sampled composition more closely reflected the adult online population. In India, the sample is unweighted and should be considered a sample of high-income consumers who own both a flat screen TV and a smartphone. The generalized margin of error is +/- 3.1 percentage points within each country. All surveys and polls may be subject to other sources of error, including but not limited to coverage error and measurement error.