

Sony HT-ST3 Sound Bar Claims Verification

Summary

Strategy Analytics undertook independent research to verify bold marketing claims that Sony wishes to make for its new Sound Bar, the HT-ST3. The specifications of the HT-ST3 were assessed against a customised dataset of competitor devices compiled using automated web-scraping agents and manual research methods. The following claims for the HT-ST3 Sound Bar were found to be supported as of the 26th July 2013.

Sony HT-ST3 Sound Bar

Claim	Status
The world's slimmest Bluetooth® Sound Bar*	Verified
The world's most compact Sound Bar*	Verified
The world's slimmest NFC Sound Bar*	Verified
The world's slimmest 4.1ch Sound Bar*	Verified
Sony is the world leader in NFC Sound Bars**	Verified

* Specifications based on 40 x 32.5 x 900mm (HDW) and verified as of 26th July 2013.
 ** Sony currently has more NFC (Near Field Communication) enabled Sound Bars in its portfolio than any other global vendor. Specifications verified as of 26th July 2013.

Sound Bar definition

An audio speaker array in horizontal alignment encased within a single unit bar or lance form factor (where width/length is the largest dimension).

Sound Bars are designed for use with in-home audio-visual equipment; their primary function being the delivery of a pseudo/front surround-sound experience when linked to a television.

Sound Bars can be categorised according to their channel configuration i.e. 2.1ch, 4.1ch, 5.1ch etc (see next slide). They may have an integral subwoofer or be paired with a separate unit and/or additional speakers via wired or wireless connections.

Definition of additional terms

Subwoofer:

A speaker dedicated to the production of low frequency sound also referred to as bass. Sound Bars may have an integral (built in) subwoofer, use a separate unit paired via a wired or wireless connection, or not facilitate subwoofer use (which can be determined from the channel configuration code, see below).

Power Output:

The maximum acoustic power that the Sound Bar can deliver. The unit of measurement quoted in this report is Watts (w) as published by the manufacturer. Where the maximum output is not available the value may be calculated from individual speaker outputs (where available) or reported as "Not Specified".

Channel Configuration:

Surround sound systems may be reported as having various channel configurations i.e. 2.1ch, 4.1ch, 5.1ch etc. The definitions here are specific to Sound Bars and therefore differ slightly to standard surround sound systems. The first digit represents the number of discrete standard channels and the digit after the decimal indicates the low frequency enabled channels (i.e. the inclusion of a subwoofer channel even if one is not paired) i.e.:

- 2.0ch Configuration: A 2 channel audio device with no low frequency channel often referred to as stereo.
- 2.1ch Configuration: A 3 channel audio device, with 2 standard channels and 1 low frequency/subwoofer channel.
- 4.1ch Configuration: A 5 channel audio device, with 4 standard channels and 1 low frequency channel (utilised by a subwoofer, if connected).

NFC:

Near Field Communication is a standard which allows contactless pairing between devices when placed in close proximity to one another. For Sound Bars NFC facilitates simple Bluetooth® pairing. Installation of a specific application on an NFC-enabled smart device may be required to enable this function.

Bluetooth®:

Wireless connectivity protocols which allow the exchange of data between paired devices. There are various Bluetooth® versions and codecs, however, in this context audio is normally transmitted via the Advanced Audio Distribution Protocol (A2DP). To pair devices they must share the same Bluetooth® profile codes and initial setup requires user input unless facilitated by NFC (see above).

Source: Strategy Analytics independent online and industry research; Correct on 26th July 2013.

The world's slimmest Bluetooth® Sound Bar

The world's slimmest NFC Sound Bar

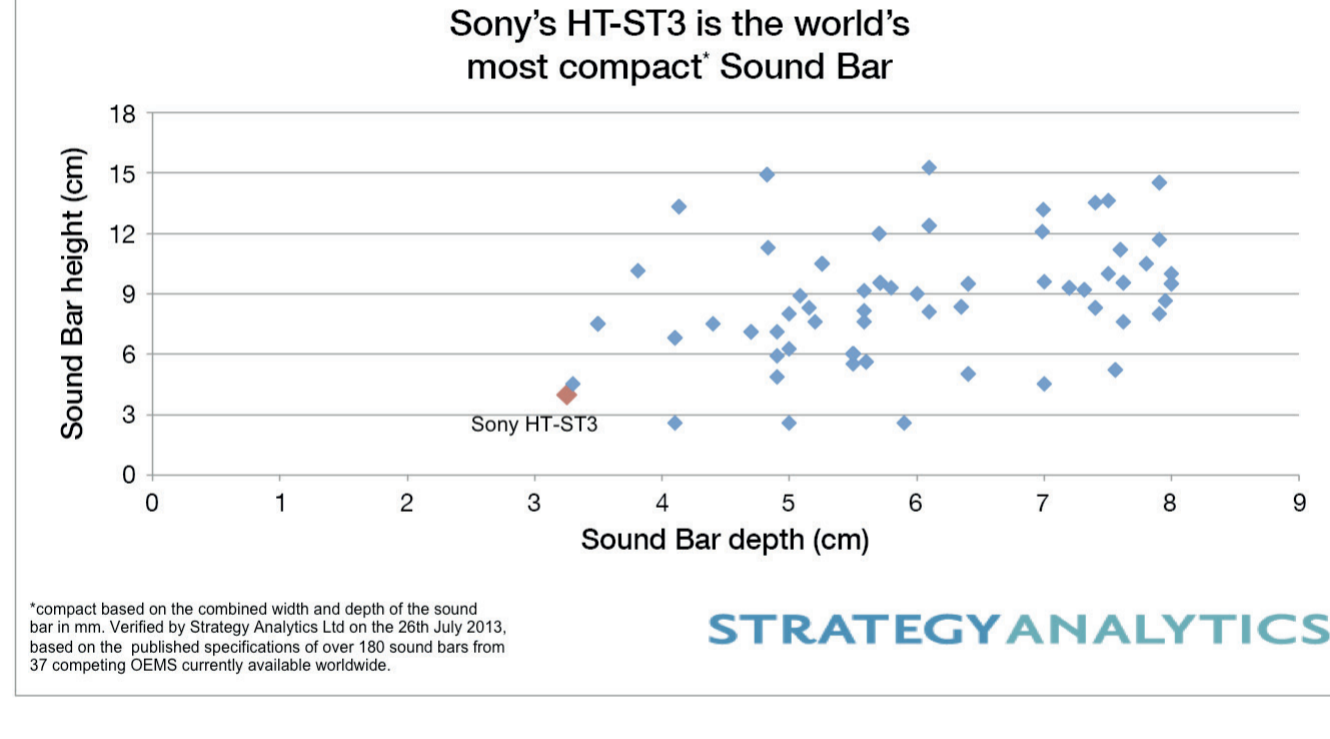


At just 4cm high the HT-ST3 is the world's slimmest Sound Bar with Bluetooth® and/or NFC

- This claim has been expanded to Bluetooth® enabled Sound Bars as there are only a very limited number of NFC enabled devices in this product group, making Sony the current world leader.
- Samsung's DA-F60 Portable Wireless Speaker with NFC could be considered a competitor but is not positioned as a Sound Bar, but does have BT and NFC. This is a 2.0ch device with the following dimensions: 22.55 x 13.1 x 4.65cm (W x D x H) and is the only competing audio device similar to the Sony Sound Bar range, with just 20w total power output. Although identified as a potential competitor the specs of this device are considerably lower.

Source: Strategy Analytics independent online and industry research; Correct on 26th July 2013.

The world's most compact* Sound Bar

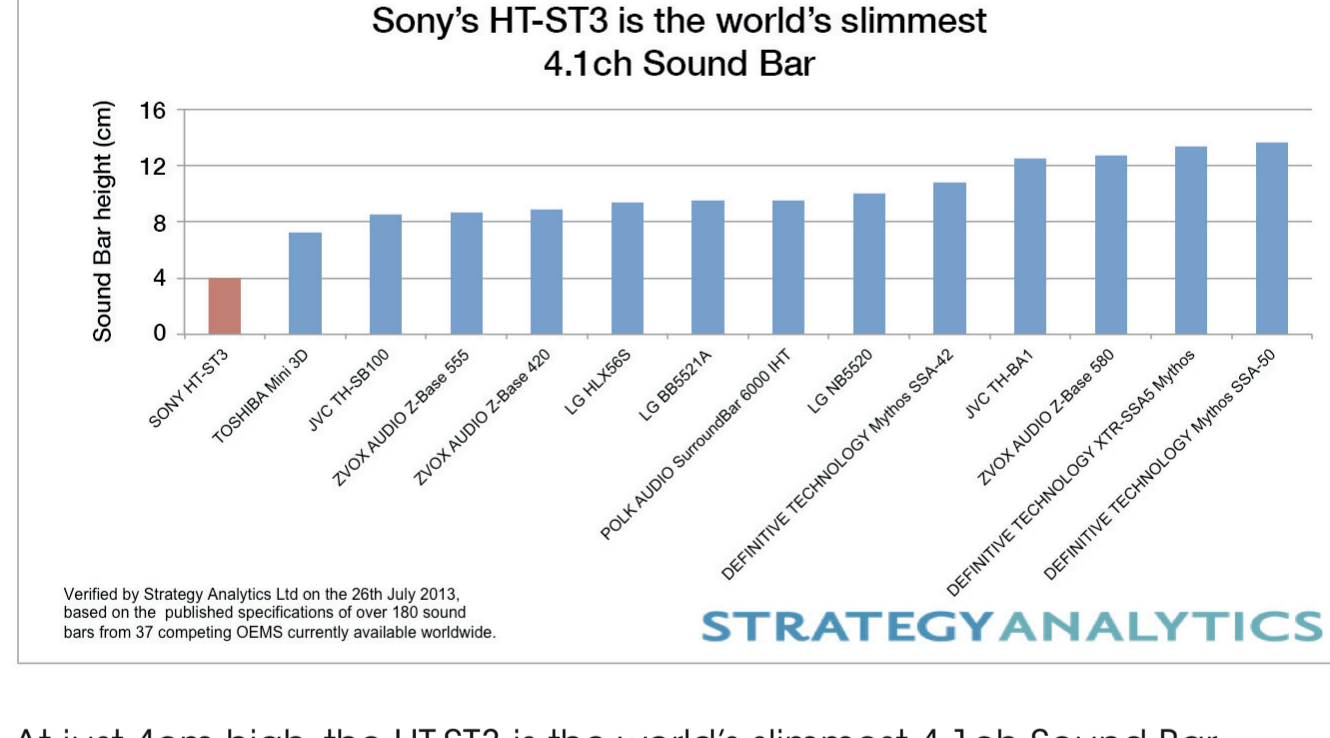


At just 4cm high and 3.25cm deep, the HT-ST3 has the most compact profile of any Sound Bar

- With an overall volume of just 1170cm³ combined with a width/length of 90cm the HT-ST3 can be considered the sleekest device of its type.
- The Toshiba Mini 3D Sound Bar could also be considered compact, however at just 29cm long its total volume (LxWxD) is 2088cm³.

Source: Strategy Analytics independent online and industry research; Correct on 26th July 2013.

The world's slimmest 4.1ch Sound Bar



At just 4cm high, the HT-ST3 is the world's slimmest 4.1ch Sound Bar

- The majority of Sound Bars are 2.1ch, however the HT-ST3 combines superior channel configuration with an extremely slim form factor.
- Sharp has a number of 2.5cm high Sound Bars, however these are all 2.1ch.

Source: Strategy Analytics independent online and industry research; Correct on 26th July 2013.

Methodology

To verify and suggest claims for Sony's new Sound Bar, the HT-ST3, Strategy Analytics undertook the following activities:

- Conducted extensive online research in an effort to produce an exhaustive list of Sound Bars (with specifications) offered by 37 competing vendors (listed on the following slide)
- Utilised web scraping agents to crawl vendor and retailer websites and online stores to collect preliminary device names and specifications (see detailed links on slide 12).
- Manually researched identified devices, collecting pertinent information for verification of the proposed claims.
- Compiled a spreadsheet detailing relevant specifications for over 180 Sound Bars currently available world wide.
- Analysed the dataset, verified the claims and suggested additional "bold claims"

Source: Strategy Analytics independent online and industry research; Correct on 26th July 2013.

Vendors Profiled During Online Research

ATLANTIC TECHNOLOGY	HARMAN KARDON	NPG	SANDSTROM
AUDIOSOURCE	JBL	ONKYO	SHARP
B&W	JVC	ORBITSOUND	SONOS
BLAUPUNKT	KEF	OTONE	SONY
BOSE	KLIPSCH	PANASONIC	TOSHIBA
BOSTON ACOUSTICS	LEON	PHILIPS	VIZIO
COBY	LG	PINNACLE SPEAKERS	YAMAHA
DEFINITIVE TECHNOLOGY	LOGIK	POLK AUDIO	ZVOX AUDIO
ENERGY SPEAKERS	MARTIN LOGAN	ROTH	
GOLDENEAR TECHNOLOGY	MAXELL	SAMSUNG	

Source: Strategy Analytics independent online and industry research; Correct on 26th July 2013.