

## Worldwide HDTV Households: 36 Million and Growing

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### Report Summary

The number of worldwide high-definition television (HDTV) households continues to increase. The worldwide total of HDTV households, which are defined as households with an installed HD-capable TV set that also receives and watches HD programming, is on track to increase by 25% in 2008. In 2009, the total is projected to increase by another 30%.

This report examines the worldwide availability of HDTV services and discusses the market and technology challenges facing today's high-definition service deployments. It briefly examines different HD business models, provides an in-depth discussion of the different distribution platforms for HDTV services, and reports the results of a recent US consumer survey about HDTV services.

In addition, it identifies leading cable, satellite, and terrestrial service providers. The report also looks back at historical HDTV household growth and forecasts worldwide HDTV households through the year 2012.

### What's in the Report?

- Forecasts for HDTV households, by geographic region and transmission platform
- An examination of historical HDTV household and services growth
- An examination of HDTV service business models
- A US consumer survey about HDTV service
- An overview of leading cable, satellite, telco, and terrestrial TV HDTV service providers

### Who Will be Interested in This Report?

- Pay-TV service providers, to include cable operators, satellite TV service providers, telco TV/IPTV service providers, and terrestrial TV broadcasters
- Companies providing products or infrastructure for digital TV

### HIGHLIGHTS

- Worldwide HDTV households are growing rapidly. By year-end 2008, there will be over 37 million, up from 29.6 million at year-end 2007.
- In the US, there are currently 22 million HDTV households. Another 17 million have an installed HDTV set but are not watching HD programming.

**Whose Needs Does This Report Address?**

- Pay-TV service providers
- HDTV product (TV sets, set top boxes, etc.) vendors
- Component vendors (software, silicon, etc.) for HDTV products
- Content developers providing HD programming

**What Questions Does This Report Answer?**

- How big is the market for HDTV services?
- How much are service providers charging for HDTV?
- Who are the leading service providers for HDTV service?
- Which countries have the largest numbers of HDTV households?
- How are the business models for delivering HDTV services changing?
- What do US consumers think about HDTV services?
- How will the market for HDTV services grow in the future?

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## Methodology

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This report covers the availability of high-definition television services around the world. It covers market and industry drivers for HDTV service subscribers and viewers, and discusses how the development of different HD business models is impacting the market for HDTV services.

The report also takes an in-depth look at existing HDTV service providers and provides five-year forecasts for worldwide HDTV households by transmission platform (satellite, cable, telco, and terrestrial), worldwide HDTV households by geographic region, US HDTV households, and the installed base of US HDTV sets. In addition, it presents the results of a US consumer survey about HDTV service adoption and availability.

Data collection and analysis for this report included primary and secondary research about high-definition TV services and products. Data was also collected from conferences, meetings, and attendance at consumer electronics and multi-channel television industry trade shows. The International Consumer Electronics Show in January 2008 and The Cable Show in May 2008 were particularly valuable.

Primary research included telephone, fax, and electronic mail conversations with digital TV equipment manufacturers, cable television multiple systems operators (MSOs), direct broadcast satellite (DBS) service providers, telco TV service providers, and terrestrial broadcast TV service providers. In addition, we spoke with several broadcasting and communications industry interest groups. Secondary research included detailed analysis of the worldwide market demand for HDTV services, including an examination of existing HDTV services and available HD content. To accomplish this, we made extensive use of public documents available on the Internet, such as financial statements, press releases, and news articles about HDTV.

Information was also collected from Reed Business Information's Electronics Group and its Media Group. A significant amount of the secondary research data came from the following Reed Business Information publications: *Broadcasting & Cable*, *Multichannel News*, and *TWICE* magazine. In addition, In-Stat's Multimedia Broadband Services, Multimedia Broadband Infrastructure, Cable Industry, Residential Connectivity, and Wireless Broadband databases were consulted frequently during this research.

All prices are reported in US dollars using currency exchange rates as of December 2008.

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## Related In-Stat Reports

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- #IN0804065ME     *Digital TV 2008: Shipments Increase While Revenues Flatten in the Worldwide Market, August 2008*  
<http://www.instat.com/abstract.asp?id=162&SKU=IN0804065ME>
- #IN0804059MBS     *The Worldwide Digital Satellite Pay-TV Market, 2008, December 2008*  
<http://www.instat.com/abstract.asp?id=288&SKU=IN0804059MBS>
- #IN0804060MBS     *Worldwide Telco TV Services 2008: Explosive Growth Continues, December 2008*  
<http://www.instat.com/abstract.asp?id=288&SKU=IN0804060MBS>

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