

# Consumer Survey: U.S. HDTV Services

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To get a better feel for the level of knowledge about HDTV services, and the level of demand for them, In-Stat conducts an annual US-based consumer survey about the topic.

In January 2005, 6,000 members of In-Stat Technology Adoption panel were sent an e-mail invitation to participate in a brief survey on the topic of High Definition Television Service. This invitation contained a link to the on-line survey, so that members interested in participating could click on the link and be taken directly to the survey. The survey was accessible for one week, and during that time 746 panelists attempted to take the survey. Of these, 744 panelists passed the screening criteria and completed the survey.

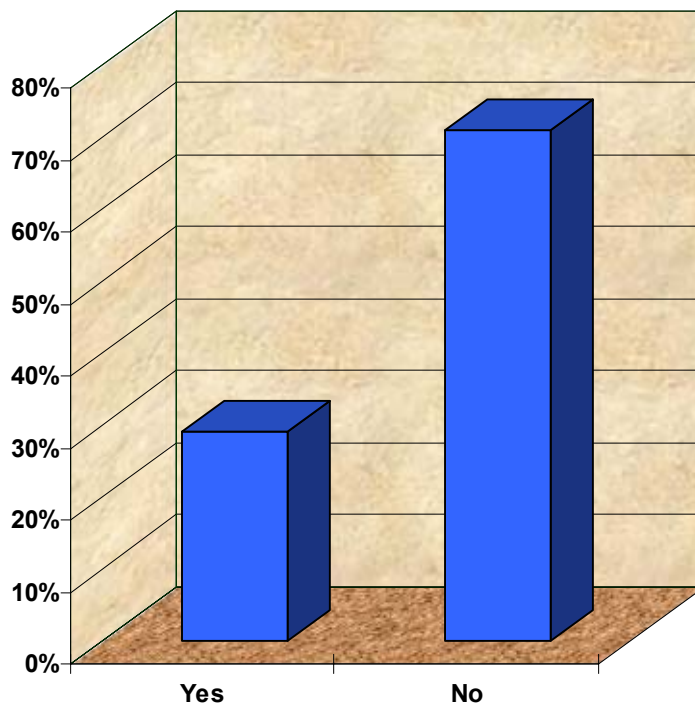
In-Stat's Technology Adoption Panel is a dynamic, online panel of more than 12,000 technology users and decision makers interested in contributing their opinions and insights about technology usage and technology issues in the workplace. The panel is comprised of a diverse group of people who represent a wide range of company sizes, industries, and areas of expertise. The diversity of the panel allows us to gather information on a variety of topics from many different perspectives.

## Key Findings of the Survey

Key findings of our HDTV services survey include:

- 29% of the 744 panel respondents own a digital TV set, and 19% of the respondents own an HDTV set.

**Question: Do You Own a Digital TV Set?**



- 12% of the panel respondents actually subscribe to an HDTV service. Comcast is the leading provider of HD service among the panelists with over 26% of all respondents subscribing to their service. DirecTV and Time Warner Cable tied for second place with 15% each.
- Of those panelists without an HDTV set, an amazing 76% stated that they had seen HD programming on an actual HDTV set. Most of these people noted that they had experienced HDTV at a retail store or at a friend's house.
- Unsurprisingly, the leading reason that panelists did not have HDTV service was the price of the HDTV set. 42% of the respondents listed the cost of the HDTV set as the primary reason for not having HDTV service.