

SET TOP DEVICES: MOVE TOWARD DIGITAL SYSTEMS FORECASTS TO 2000.

MARKET OPPORTUNITIES

Set top equipment market growth is expanding as analog systems are replaced by digital ones. Migration paths are evolving as existing systems are extended to permit orderly transitions to new technologies. Broadband communications networks, new applications, interactive systems, business uses, and freer competition represent significant market growth drivers.

- Expanding number of channels
- Expanding number of applications
- Implementation of digital compression
- Implementation of broadband wire networks
- Implementation of satellite and wireless delivery of services
- Increases in speed and power of set top devices
- Simplified access to programming and content
- Provision of open system technologies
- Interconnection of TVs to Internet
- Support for strategic partnering
- Support improved entertainment options
- Support improved productivity in planning leisure time

New set top receivers and terminals will simplify access to entertainment and programming. As other network systems become overloaded.

Key Findings of Study

Key Market Directions and Opportunities

- Set top units support orderly migration paths
- Migration paths are positioned to protect existing network investment
- Expanded content is creating demand for set top products
- Network expansion is occurring
- As a result of fiber optic broadband creation of more bandwidth markets will shift
- Satellite receiver units are positioned to develop increased market share
- Cable fiber to the curb architectures are evolving
- Applications will drive set top receiver implementation
- Companies are positioning to sell complete solutions

COMPANY PROFILES

ANADIGICS
C-CUBE MICROSYSTEMS
DIVICOM
DAEWOO
GENERAL INSTRUMENT
HEWLETT PACKARD
HUGHES ELECTRONICS
HYUNDAI ELECTRONICS
TV/COM
MATSUSHITA
PANASONIC
PROSCAN
SAMSUNG ELECTRONICS
SANYO
SCIENTIFIC-ATLANTA
SIERRA RESEARCH AND TECHNOLOGY
SONY

THOMSON CONSUMER ELECTRONICS
TOSHIBA
UNIDEN
ZENITH

SATELLITE SERVICES

ALPHA STAR
DIRECT TV
ECHO STAR
PRIME STAR

REPORT METHODOLOGY

This is the fourteenth in a series of market forecasts of networking and interoperability. The project leaders have significant experience preparing industry studies. Forecasts are based on primary research and proprietary data bases. In-depth interviews are conducted with a broad range of key participants and opinion leaders.

REPORT OUTLINE

Executive Summary
1. Market Definition
 Market Convergence
 Marketplace Changes
 Changes in Video Distribution
 Target Market Areas

Digital Photographic, Video, Game Communications Computers
Cable Modem Opportunity
PC Markets
PC Modem Households
Cable Households

Basic Premium
Cable Advertising
CD-ROM ON DEMAND
INTERACTIVE TV TRIALS
TIME WARNER

REPORT OUTLINE (Continued)

AMERITECH
BELL ATLANTIC
PACIFIC TELESIS

TCI
SOUTHERN MULTIMEDIA COMMUNICATIONS

MULTI USE OF INFRASTRUCTURE
DISCIPLINED NAVIGATION

2. MARKETPLACE CHANGES
MARKET GROWTH FACTORS

CHANGES IN VIDEO
 DISTRIBUTION
 DIGITAL
 PHOTOGRAPHIC, VIDEO,
 GAME
 COMMUNICATIONS
 COMPUTERS
 CABLE MODEM
 OPPORTUNITY
 INTERACTIVE TV TRIALS
 TIME WARNER
 AMERITECH
 BELL ATLANTIC
 PACIFIC TELESIS
 TCI
 SOUTHERN MULTIMEDIA
 COMMUNICATIONS
 TVS

3. SET TOP TERMINAL
MARKET FORECASTS

OVERVIEW
 SUMMARY MARKET SHARES
 SUMMARY FORECASTS
 INSTALLED BASE
 SUMMARY FORECASTS
 UNITS
 SUBSCRIBER BASE
 ANALOG SET TOP MARKET
 SHARES AND FORECASTS
 BASIC ANALOG SET TOP
 TERMINALS
 ANALOG ADDRESSABLE
 SYSTEMS
 GENERAL INSTRUMENT
 SCIENTIFIC-ATLANTA
 DIGITAL SET TOP
 TERMINALS
 SHIPMENTS

4. PRODUCTS

SET TOP CONVERTERS
 GENERAL INSTRUMENT
 GI IMPULSE PRODUCTS
 GI REMOTE CONTROLS
 GI SEGA CHANNEL
 ADDRESSABLE CONTROL

ANALOG VIDEO SYSTEMS
 GENERAL INSTRUMENT
 SCIENTIFIC ATLANTA
 SCIENTIFIC-ATLANTA
 INTERDICTION
 SUBSCRIBER SYSTEMS
 REGAL
 NOKIA
 TV/COM
 SONY

5. TECHNOLOGY

COMPETITIVE FACTORS
 DIGITAL COMPRESSION
 DIGITAL HEADEND
 DIGITAL STORAGE AND
 RETRIEVAL
 FIBER TO CURB
 BROADBAND
 COMMUNICATIONS
 MULTIMEDIA TAP
 OPEN INDUSTRY
 STANDARDS
 CABLE MODEMS
 SOFTWARE
 ATM COMPONENTS
 SECURITY
 SATELLITE NETWORKS
 SATELLITE TELEVISION
 STANDARDS
 REGULATION

6. COMPANY PROFILES

**7. ACQUISITIONS AND
 STRATEGIC ALLIANCES**
 GENERAL INSTRUMENT AND
 FORE
 GENERAL INSTRUMENT /
 SAMSUNG ELECTRONICS
 GENERAL INSTRUMENT /
 VIDEOWARE
 GENERAL INSTRUMENT /
 THERMATIC
 SCIENTIFIC-ATLANTA / SEGA
 SCIENTIFIC-ATLANTA AND
 DIGITAL MUSIC EXPRESS
 SCIENTIFIC-ATLANTA /
 MICROSOFT
 SCIENTIFIC-ATLANTA /
 THOMSON

SCIENTIFIC-ATLANTA / 1
 PIONEER ELECTRONIC /
 TOSHIBA 1
 HYUNDAI ELECTRONICS
 TEE-COMM ELECTRONICS 10
 ZENITH / WALT DISNEY
 GENERAL INSTRUMENT AND
 SAMSUNG 10
8. STRATEGIC POSITIONING
 POSITIONING IN 12
 TELECOMMUNICATIONS
 MARKETS 15
 DISTRIBUTION 16
 BUILDING DEFACTO 19
 INDUSTRY STANDARD 21
 ENTERTAINMENT 22
9. APPLICATIONS 24
 OVERVIEW 26
 RETAIL DIGITAL VIDEO
 NETWORK 26
 DEPARTMENT STORE 27
 AUTO PARTS
 INTERNET
 DATA CASTING 1
 DISTANCE LEARNING 1
 BUSINESS AND 1
 CORPORATE 5
 PROFESSIONAL 8
 UNIVERSITY AND
 COLLEGE 12
 8.5.4 ELEMENTARY 12
 SCHOOL AND HIGH
 SCHOOL 20
 ENERGY AND UTILITY
 CONTROL 20
 COMMUNICATIONS AND
 TRACKING SYSTEMS 25
 INTERACTIVE MULTIMEDIA
 NETWORKS 29
 ELECTRONIC GAMES
 ADVERTISING AND DIRECT 31
 MARKETING 38
 HOME SHOPPING-
 SOFTWARE DISTRIBUTION
 E-MAIL, E-FAX, AND
 NEWSGROUP SERVICES
 CD-ROM ON DEMAND

LIST OF TABLES AND FIGURES

**1995-2000 FORECASTS AND
 MARKET SHARES BY SEGMENT**

Set Top Market Shares, 1995
 Set Top Forecasts, 1995-2000
 Set Top Unit Shipments, 1995-2000
 Set Top Installed Base, 1995-2000
 Set Top Penetration, 1995-2000
 Analog Units
 Addressable Analog Units
 Digital Set Tops

Digital DTH Set Tops
 Satellite Services, 1995-2000
 SERVICES descriptions
 FORCES CREATING NEED
 MARKET DRIVING FORCES

Buy this Study Now

