

CHAPTER ONE: INTRODUCTION.....	1
STUDY GOALS AND OBJECTIVES.....	1
REASONS FOR UNDERTAKING THE STUDY	1
DIGITAL DEVICES FOR THE LIVING ROOM: MARKET SEGMENTATION	2
REPORT SCOPE AND ORGANIZATION	2
INTENDED AUDIENCE.....	3
METHODOLOGY	3
ANALYST CREDENTIALS.....	4
RELATED REPORTS	4
BCC ONLINE SERVICES.....	4
DISCLAIMER	5
CHAPTER TWO: SUMMARY.....	6
<i>SUMMARY TABLE GLOBAL DIGITAL LIVING ROOM DEVICES MARKET, BY REGION, THROUGH 2015 (\$ MILLIONS)</i>	6
<i>SUMMARY FIGURE DIGITAL LIVING ROOM TECHNOLOGY MARKET, 2009–2015 (\$ MILLIONS)</i>	7
SUMMARY (CONTINUED)	8
CHAPTER THREE: DIGITAL LIVING ROOM DEVICES: OVERVIEW AND MARKET SEGMENTATION	9
DIGITAL LIVING ROOM DEVICES:.....	9
DIGITAL LIVING ROOM DEVICES: MARKET SEGMENTATION.....	10
DIGITAL LIVING ROOM MARKET: GEOGRAPHIC SEGMENTS.....	10
DEVICE DEVELOPMENT CONSIDERATIONS	10
<i>FIGURE 1 DLR DEVICES: UNDERLYING HARDWARE AND SOFTWARE COMPONENTS</i>	11
DLR DEVICES DEVELOPMENT PROCESS	12
PRICING CONSIDERATIONS	13
DEVELOPMENT COSTS	13
<i>TABLE 1 DLR DEVICES DEVELOPMENT: COST CONSIDERATION</i>	13
<i>TABLE 2 BILL OF MATERIALS</i>	14
DLR MARKET BY SEGMENT.....	14
<i>TABLE 3 GLOBAL DLR MARKET BY SEGMENT, THROUGH 2015 (\$ MILLIONS)</i>	15
<i>FIGURE 2 GLOBAL MARKET FOR DLR DEVICES BY SEGMENT, 2009–2015 (\$ MILLIONS)</i>	15
<i>FIGURE 3 GLOBAL MARKET FOR DLR DEVICES BY SEGMENT, 2010 (\$ MILLIONS)</i>	16
<i>TABLE 4 GROWTH RATES OF GLOBAL DLR MARKET, THROUGH 2015 (%)</i>	17
CHAPTER FOUR: DIGITAL TV.....	18
DIGITAL TV MARKET OVERVIEW.....	18

ANALOG TV.....	18
DIGITAL TV.....	19
HIGH-DEFINITION TELEVISION.....	20
DTV MARKET SEGMENTATION BY TV DISPLAY TECHNOLOGIES.....	21
CATHODE-RAY TUBE TV.....	21
LIQUID CRYSTAL DISPLAY TELEVISIONS.....	21
PLASMA TV.....	22
PROJECTION TV.....	23
THREE-DIMENSIONAL TV.....	24
3D-Ready TV Sets.....	25
DTV PRICING TRENDS.....	25
TABLE 5 HDTVS AVERAGE PRICING BY SIZE (\$)	26
TABLE 6 FACTORS AFFECTING DTV PRICING.....	26
OVERALL DTV MARKET.....	27
TABLE 7 GLOBAL DTV MARKET BY UNIT SHIPMENTS, THROUGH 2015 (MILLIONS).....	27
FIGURE 4 GLOBAL DTV MARKET BY UNIT SHIPMENTS, 2009–2015 (MILLIONS).....	27
TABLE 8 GLOBAL DTV MARKET, THROUGH 2015 (\$ MILLIONS).....	28
FIGURE 5 GLOBAL DTV MARKET, 2009–2015 (\$ MILLIONS).....	28
TABLE 9 GLOBAL DTV MARKET BY REGION, THROUGH 2015 (MILLION UNITS).....	29
FIGURE 6 GLOBAL DTV SHIPMENTS BY REGION, 2009–2015 (MILLION UNITS).....	29
TABLE 10 GLOBAL DTV MARKET BY REGION, THROUGH 2015 (\$ MILLIONS).....	30
FIGURE 7 GLOBAL DTV MARKET BY REGION, 2009–2015 (\$ MILLIONS).....	30
PLASMA TV.....	30
TABLE 11 GLOBAL PLASMA TV MARKET BY UNIT SHIPMENTS, THROUGH 2015 (MILLIONS).....	31
FIGURE 8 GLOBAL PLASMA TV MARKET BY UNIT SHIPMENTS, 2009–2015 (MILLIONS).....	31
TABLE 12 GLOBAL PLASMA TV MARKET, THROUGH 2015 (\$ MILLIONS).....	32
FIGURE 9 GLOBAL PLASMA TV MARKET, 2009–2015 (\$ MILLIONS).....	32
LCD/LED TV.....	32
TABLE 13 GLOBAL LED/LCD TV MARKET BY UNIT SHIPMENTS, THROUGH 2015 (MILLIONS).....	33
FIGURE 10 GLOBAL LED/LCD TV MARKET BY UNIT SHIPMENTS, 2009–2015 (MILLIONS).....	33
TABLE 14 GLOBAL LCD/LED TV MARKET, THROUGH 2015 (\$ MILLIONS).....	34
FIGURE 11 GLOBAL LED/LCD TV MARKET, 2009–2015 (\$ MILLIONS).....	34

CRT TV	34
TABLE 15 GLOBAL CRT TV MARKET BY UNIT SHIPMENTS, THROUGH 2015 (MILLIONS).....	35
FIGURE 12 GLOBAL CRT TV MARKET BY UNIT SHIPMENTS, 2009– 2015 (MILLIONS).....	35
TABLE 16 GLOBAL CRT TV MARKET, THROUGH 2015 (\$ MILLIONS)	36
FIGURE 13 GLOBAL CRT TV MARKET, 2009–2015 (\$ MILLIONS).....	36
PROJECTION TVS	36
TABLE 17 GLOBAL PROJECTION TV MARKET BY UNIT SHIPMENTS, THROUGH 2015 (MILLIONS).....	37
FIGURE 14 GLOBAL PROJECTION TV MARKET BY UNIT SHIPMENTS, 2009–2015 (MILLIONS)	38
TABLE 18 GLOBAL PROJECTION TV MARKET, THROUGH 2015 (\$ MILLIONS).....	38
FIGURE 15 GLOBAL PROJECTION TV MARKET, 2009–2015 (\$ MILLIONS).....	39
3D-TV	39
TABLE 19 GLOBAL 3D-TV MARKET BY UNIT SHIPMENTS, THROUGH 2015 (MILLIONS).....	39
FIGURE 16 GLOBAL 3D-TV MARKET BY UNIT SHIPMENTS, 2009– 2015 (MILLIONS).....	40
TABLE 20 GLOBAL 3D-TV MARKET, THROUGH 2015 (\$ MILLIONS).....	40
FIGURE 17 GLOBAL 3D-TV MARKET, 2009–2015 (\$ MILLIONS)	41
DTV MARKET TRENDS	41
DTV Market Trends (Continued).....	42
CHAPTER FIVE: DVD PLAYERS.....	43
DVD BASICS.....	43
BLU-RAY DVD.....	44
3D BLU-RAY DVD PLAYERS.....	45
CURRENT STATE OF DVD PLAYERS	45
OVERALL DVD PLAYERS MARKET	46
TABLE 21 GLOBAL DVD PLAYERS MARKET BY UNIT SHIPMENTS, THROUGH 2015 (MILLIONS).....	46
FIGURE 18 GLOBAL DVD PLAYERS MARKET BY UNIT SHIPMENTS, 2009–2015 (MILLIONS)	47
TABLE 22 GLOBAL DVD PLAYERS MARKET, THROUGH 2015 (\$ MILLIONS).....	47
FIGURE 19 GLOBAL DVD PLAYERS MARKET, 2009–2015 (\$ MILLIONS).....	48
DVD PLAYERS MARKET BY REGION.....	48
TABLE 23 GLOBAL DVD PLAYER UNIT SHIPMENTS BY REGION, THROUGH 2015 (MILLIONS).....	48
FIGURE 20 GLOBAL DVD PLAYER UNIT SHIPMENTS BY REGION, 2009–2015 (MILLIONS)	49

TABLE 24 GLOBAL DVD PLAYER MARKET BY REGION, THROUGH 2015 (\$ MILLIONS).....	49
FIGURE 21 GLOBAL DVD PLAYER MARKET BY REGION, 2009–2015 (\$ MILLIONS).....	50
STANDARD-DEFINITION DVD PLAYER MARKET	50
TABLE 25 GLOBAL SD-DVD PLAYER MARKET BY UNIT SHIPMENTS, THROUGH 2015 (MILLIONS).....	50
FIGURE 22 GLOBAL SD DVD PLAYER MARKET BY UNIT SHIPMENTS, 2009–2015 (MILLIONS)	51
TABLE 26 GLOBAL SD DVD PLAYER MARKET, THROUGH 2015 (\$ MILLIONS).....	51
FIGURE 23 GLOBAL SD DVD PLAYER MARKET, 2009–2015 (\$ MILLIONS).....	52
BLU-RAY DVD MARKET	52
TABLE 27 GLOBAL BLU-RAY DVD PLAYER MARKET BY UNIT SHIPMENTS, THROUGH 2015 (MILLIONS).....	52
FIGURE 24 GLOBAL BLU-RAY DVD PLAYER MARKET BY UNIT SHIPMENTS, 2009–2015 (MILLIONS)	53
TABLE 28 GLOBAL BLU-RAY DVD PLAYER MARKET, 2009–2015 (\$ MILLIONS).....	54
FIGURE 25 GLOBAL BLU-RAY DVD PLAYER MARKET, 2009–2015 (\$ MILLIONS).....	54
DVD PLAYER MARKET TRENDS	54
DVD PLAYER MARKET TRENDS (CONTINUED)	55
CHAPTER SIX: DIGITAL VIDEO RECORDERS.....	56
BASICS OF DIGITAL VIDEO RECORDERS	56
BASICS OF DIGITAL VIDEO RECORDERS (CONTINUED).....	57
PERSONAL COMPUTER CARDS.....	58
Hardware Features	58
Software Features	59
DVR DEVICE TRENDS	59
DVR MARKET	60
TABLE 29 GLOBAL DVR MARKET BY UNIT SHIPMENTS, THROUGH 2015 (MILLIONS).....	60
FIGURE 26 GLOBAL DVR MARKET BY UNIT SHIPMENTS, 2009–2015 (MILLIONS).....	61
TABLE 30 GLOBAL DVR MARKET, THROUGH 2015 (\$ MILLIONS).....	61
FIGURE 27 GLOBAL DVR MARKET, 2009–2015 (\$ MILLIONS)	62
TABLE 31 GLOBAL DVR UNIT SHIPMENTS BY REGION, THROUGH 2015 (MILLIONS).....	62
FIGURE 28 GLOBAL DVR UNIT SHIPMENTS BY REGION, 2009–2015 (MILLIONS).....	63
TABLE 32 GLOBAL DVR MARKET BY REGION, THROUGH 2015 (\$ MILLIONS).....	63

<i>FIGURE 29 GLOBAL DVR MARKET BY REGION, 2009–2015 (\$ MILLIONS)</i>	64
DVR MARKET TRENDS.....	64
CHAPTER SEVEN: SET-TOP BOXES.....	65
SET-TOP BOX BASICS.....	65
SET-TOP BOXES FOR TERRESTRIAL TV.....	65
SET-TOP BOXES FOR SATELLITE.....	66
SET-TOP BOXES FOR CABLE.....	66
INTERNET PROTOCOL TV (IPTV).....	67
HYBRID IPTV SET-TOP BOXES.....	67
SET-TOP BOX DEVICE TRENDS.....	68
IPTV MARKET TRENDS.....	69
HYBRID IPTV.....	70
KEY ADVANTAGES OF IPTV.....	71
VIDEO-ON-DEMAND.....	71
LIMITATIONS OF IPTV.....	72
Latency.....	72
Privacy Implications.....	72
SET-TOP BOX MARKET.....	73
<i>TABLE 33 GLOBAL STB MARKET BY UNIT SHIPMENTS, THROUGH 2015 (MILLIONS)</i>	73
<i>FIGURE 30 GLOBAL STB MARKET BY UNIT SHIPMENTS, 2009–2015 (MILLIONS)</i>	74
<i>TABLE 34 GLOBAL STB MARKET, THROUGH 2015 (\$ MILLIONS)</i>	74
<i>FIGURE 31 GLOBAL STB MARKET, 2009–2015 (\$ MILLIONS)</i>	75
<i>TABLE 35 GLOBAL STB UNIT SHIPMENTS BY REGION, THROUGH 2015 (MILLIONS)</i>	75
<i>FIGURE 32 GLOBAL STB UNIT SHIPMENTS BY REGION, 2009–2015 (MILLIONS)</i>	76
<i>TABLE 36 GLOBAL STB MARKET BY REGION, THROUGH 2015 (\$ MILLIONS)</i>	76
<i>FIGURE 33 GLOBAL STB MARKET BY REGION, 2009–2015 (\$ MILLIONS)</i>	77
CHAPTER EIGHT: HOME THEATER SYSTEMS.....	78
BASICS OF HOME THEATER SYSTEMS.....	78
SURROUND SOUND BASICS.....	78
RECEIVER.....	79
POPULAR SURROUND SOUND FORMATS.....	80
THX Certified Systems.....	81
TRENDS IN HOME THEATER SYSTEMS.....	81
HOME THEATER SYSTEM MARKET.....	81
<i>TABLE 37 GLOBAL HOME THEATER SYSTEMS MARKET BY UNIT SHIPMENTS, THROUGH 2015 (MILLIONS)</i>	82

FIGURE 34 GLOBAL HOME THEATER SYSTEM MARKET BY UNIT SHIPMENTS, 2009–2015 (MILLIONS)	82
TABLE 38 GLOBAL HOME THEATER SYSTEM MARKET, THROUGH 2015 (\$ MILLIONS).....	83
FIGURE 35 GLOBAL HOME THEATER SYSTEM MARKET, 2009–2015 (\$ MILLIONS).....	83
TABLE 39 GLOBAL HOME THEATER SYSTEM UNIT SHIPMENTS BY REGION, THROUGH 2015 (MILLIONS)	84
TABLE 40 GLOBAL HOME THEATER SYSTEM MARKET BY REGION, THROUGH 2015 (\$ MILLIONS).....	84
FIGURE 36 GLOBAL HOME THEATER SYSTEM MARKET BY REGION, 2009–2015 (\$ MILLIONS)	85
HOME THEATER MARKET TRENDS	85
CHAPTER NINE: COMPANY PROFILES	86
AUDIOVOX	86
RECENT DEVELOPMENTS	87
BOSE	87
RECENT DEVELOPMENTS	88
BOSTON ACOUSTICS	89
RECENT DEVELOPMENTS	89
BROADCOM	90
RECENT DEVELOPMENTS	91
CISCO SYSTEMS	91
PRODUCTS AND SERVICES	92
Products and Services (Continued).....	93
RECENT DEVELOPMENTS	94
COBY	95
RECENT DEVELOPMENTS	95
DOLBY INC.	96
RECENT DEVELOPMENTS	97
DTS	98
RECENT DEVELOPMENTS	99
HARMAN	100
RECENT DEVELOPMENTS	100
HITACHI	101
HITACHI (CONTINUED).....	102
RECENT DEVELOPMENTS	103
JVC USA	103
RECENT DEVELOPMENTS	104
LG ELECTRONICS	104
RECENT DEVELOPMENTS	105
MEMOREX.....	106
RECENT DEVELOPMENTS	106
MOTOROLA.....	107

RECENT DEVELOPMENTS	108
NETFLIX.....	108
RECENT DEVELOPMENTS	109
PANASONIC	109
RECENT DEVELOPMENTS	110
PANDORA.....	111
RECENT DEVELOPMENTS	111
PHILIPS	112
RECENT DEVELOPMENTS	113
PIONEER.....	113
RECENT DEVELOPMENTS	114
POLK AUDIO.....	115
RECENT DEVELOPMENTS	115
SAMSUNG	116
RECENT DEVELOPMENTS	117
SIGMA DESIGNS INC.	118
RECENT DEVELOPMENTS	119
SLACKER.....	119
SONY.....	120
RECENT DEVELOPMENTS	121
ST MICRO.....	122
RECENT DEVELOPMENTS	123
TCL ELECTRONICS.....	124
RECENT DEVELOPMENTS	124
TIVO	125
RECENT DEVELOPMENTS	126
TOSHIBA	126
RECENT DEVELOPMENTS	127
YAMAHA.....	128
RECENT DEVELOPMENTS	129
YOUTUBE (GOOGLE)	130
RECENT DEVELOPMENTS	130
ZORAN MICROELECTRONICS.....	131
RECENT DEVELOPMENTS	131
Recent Developments (Continued).....	132

CHAPTER TEN: DLR DEVICES: HARDWARE AND SOFTWARE DESIGN ASPECTS..... 133

FIGURE 37 TYPICAL HARDWARE CONFIGURATION OF DLR

<i>DEVICE</i>	<i>133</i>
POPULAR VIDEO DECODERS	134
MPEG2.....	134
H.264/MPEG-4	135
POPULAR CONNECTIVITY FORMATS.....	135
HIGH-DEFINITION MULTIMEDIA INTERFACE.....	135

COMPOSITE VIDEO	136
COMPONENT VIDEO	136
SEPARATE VIDEO.....	137
DIGITAL VISUAL INTERFACE.....	137
UNIVERSAL SERIAL BUS	138
WI-FI.....	138
VIDEO GRAPHICS ARRAY	139
SECURE DIGITAL	140
ETHERNET.....	140
DIGITAL LIVING NETWORK ALLIANCE	140
BLUETOOTH.....	141
SOFTWARE CONSIDERATIONS	142
<i>FIGURE 38 SOFTWARE LAYERS IN A TYPICAL DLR DEVICE.....</i>	<i>142</i>
DEVICE DRIVERS	142
OPERATING SYSTEMS.....	143
MIDDLEWARE.....	144
APPLICATIONS.....	144
Applications (Continued).....	145
CHAPTER ELEVEN: PATENT ANALYSIS	146
IMPORTANCE OF PATENTS	146
DIGITAL LIVING ROOM DEVICES PATENTS	146
<i>TABLE 41 PATENTS AWARDED FOR DLR DEVICES.....</i>	<i>147</i>
<i>FIGURE 39 PATENTS AWARDED FOR DLR DEVICES.....</i>	<i>147</i>
<i>TABLE 42 DLR DEVICE PATENTS AWARDED BY SEGMENT.....</i>	<i>148</i>
<i>FIGURE 40 PATENTS AWARDED BY DLR DEVICE SEGMENT.....</i>	<i>148</i>
<i>TABLE 43 PATENTS AWARDED TO SELECTED COMPANIES.....</i>	<i>149</i>