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STB Market Data

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Energy Star Stakeholder Meeting

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Satellite and Standalone



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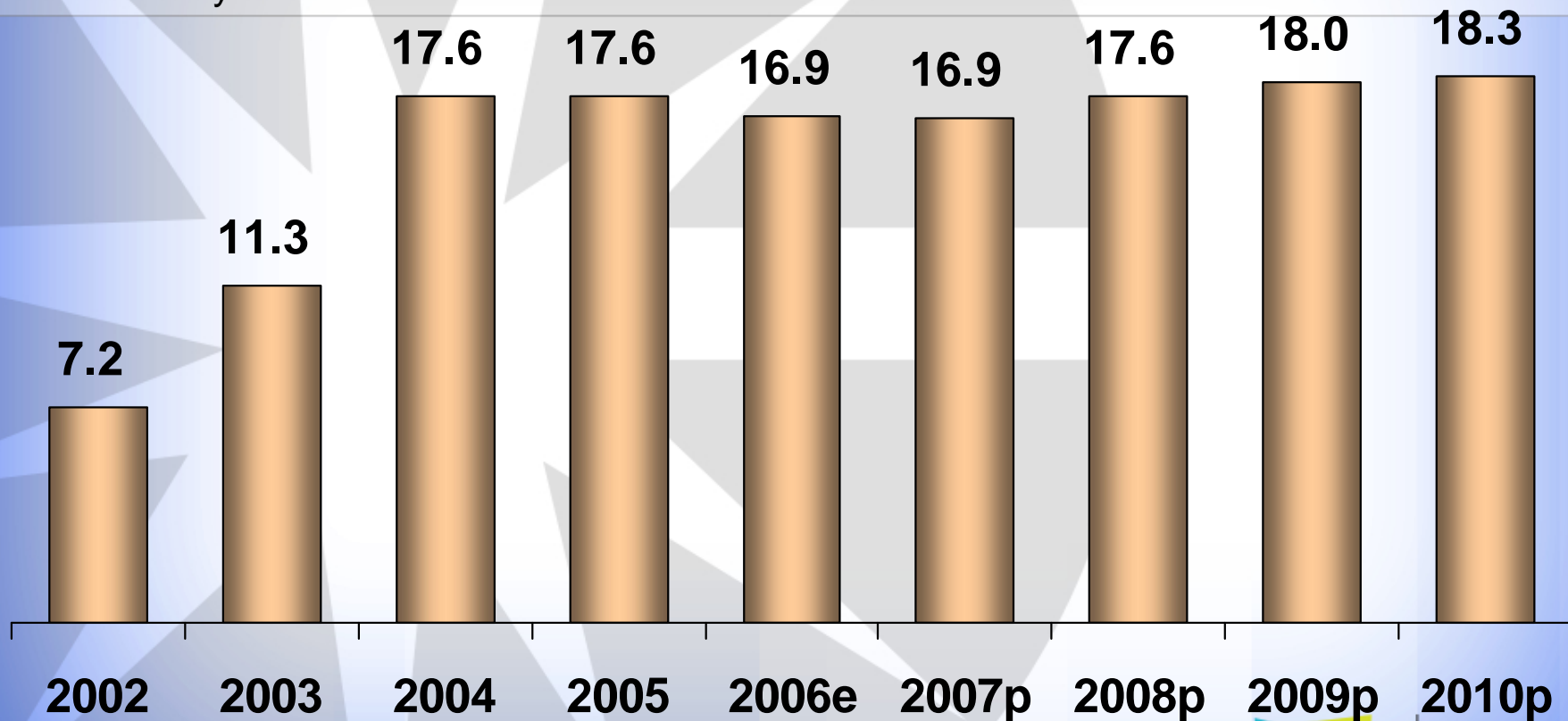
DEFINING TOMORROW'S TECHNOLOGY



Total Set-Top Box* Sales

Millions of Units

*Includes only satellite DirecTV boxes and standalone DVRs in the U.S.



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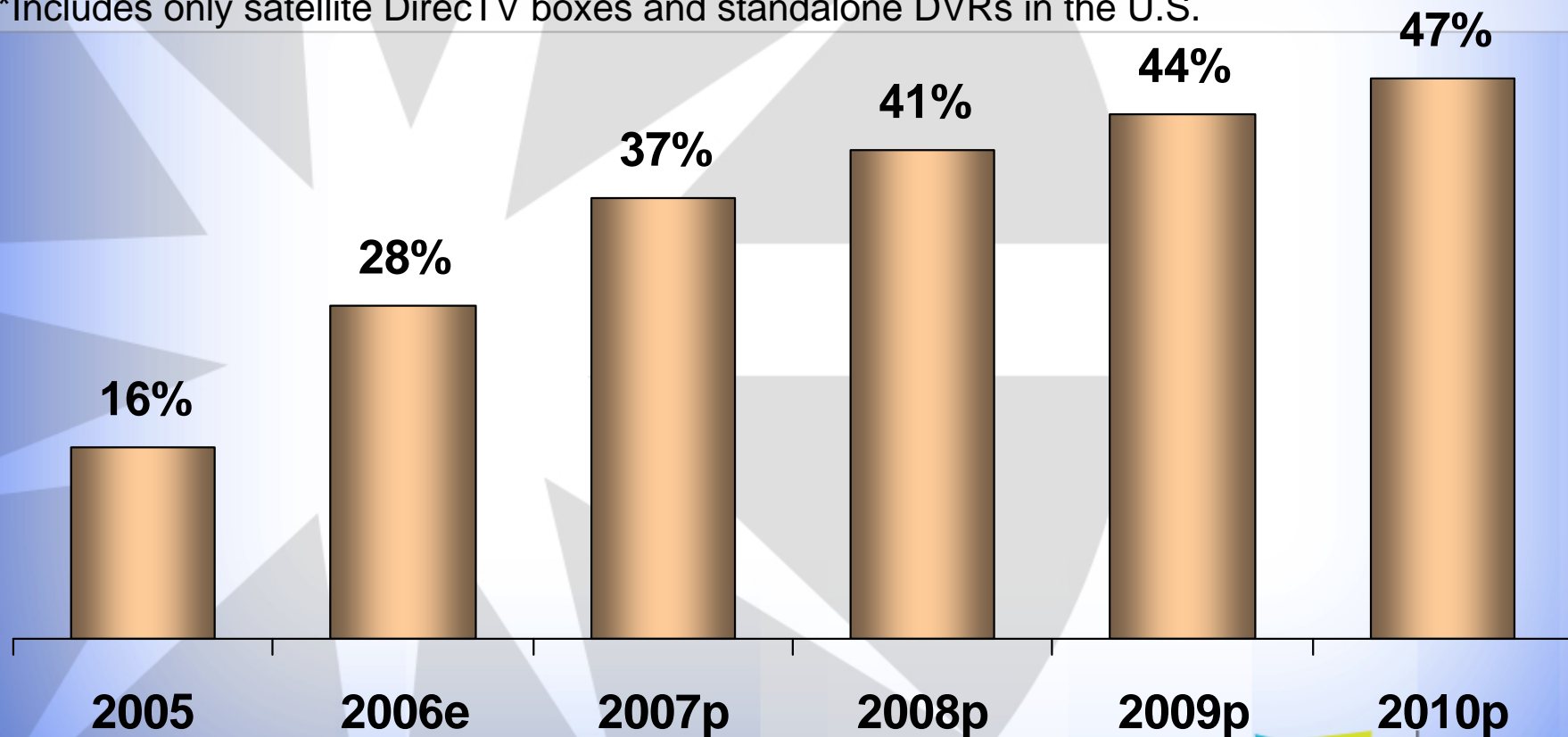


Source: Consumer Electronics Association, *CE Sales and Forecast – January 2007*

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% of Set-Top Box* Sales With Digital Video Recorder

*Includes only satellite DirecTV boxes and standalone DVRs in the U.S.



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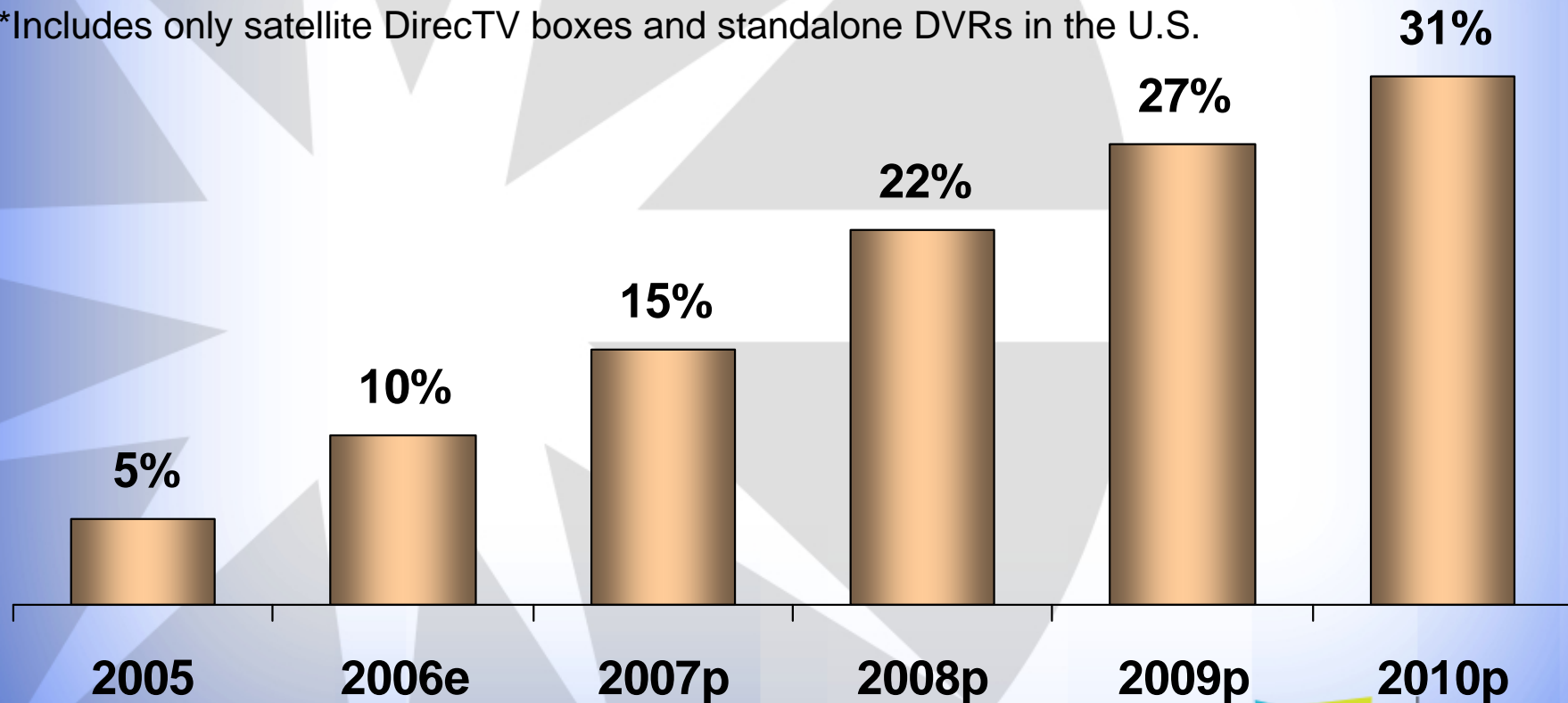


Source: Consumer Electronics Association, *CE Sales and Forecast – January 2007*

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% of Set-Top Box* Sales With HD Recording Ability

*Includes only satellite DirecTV boxes and standalone DVRs in the U.S.



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Source: Consumer Electronics Association, *CE Sales and Forecast – January 2007*

DEFINING TOMORROW'S TECHNOLOGY

DTA Converters



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Market Potential for DTA boxes

- 13.5 million households rely solely on OTA programming
- OTA households have 2 sets per household on average
- There are an additional 9.5 million OTA televisions in cable and satellite households
- Total OTA televisions in U.S. = 36.7 million as of Dec. 2006
- Due to natural product replacement cycle, CEA estimates that by February 2009, there will be **25 million OTA sets** in the U.S.
- Based on a recent consumer survey, 33% of OTA owners intend to use the government coupon to buy a DTA converter



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Other Insights

- **IPTV set-top boxes have emerged over the last year and will continue to increase market penetration.**
- **Significant number of IPTV set-top boxes will be DVR and HD capable.**
- **Cable set-top boxes will see similar trend towards increasing DVR and HD capabilities as satellite boxes.**



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