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In-Depth Analysis

Global PC TV Tuners—A Solid Niche in Transition

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Report Summary

Demand for PC-TV Tuners has turned down from 2008, due to the worldwide economic recession. The market faces fundamental issues headed by a lack of consumer demand, along with increased competition from online television and programming sources. Mobile video services will also change the playing field.

HIGHLIGHTS

- Microsoft Windows 7 and Media Center Edition may energize the market.
- PC-TV Tuners may have peaked in value during 2008 at about $1.4B.
- Attach rates for PC-TV Tuners are around 3.5%.
- 2013 PC-TV Tuner shipments will be about 20 million.

For more information or to purchase, see the report online or call 1.480.483.4441.

Key Issues in this Market Include:

- PC-TV Tuner vendors are expecting a boost with Microsoft's Windows 7 and the new version of Media Center which will include better connectivity solutions for PC-TV Tuners. The Tuner vendors are expecting that Microsoft will increase promotion of PC-TV Tuner compatibility with Media Center. But Media Center also will include better access of television programming and movies via the broadband Internet as well.
- The semiconductor companies that have been servicing the PC-TV Tuner vendors are also facing increased threat. Facing flat demand, the traditional vendors are wondering if the PC-TV Tuner segment of their broader TV Tuner business is viable. As the market shifts from a combination of analog and digital broadcast technologies to digital-only broadcast, the margins currently available for hybrid tuners will increasingly be marginalized by lower cost digital-only tuners.
- A new wave of semiconductor companies who are moving the tuner demodulation function to software offer the threat of further squeezing PC-TV Tuner margins. These new offerings with a lower Bill of Material will force the more traditional tuner companies to evaluate continued participation in the market.

This report covers the overarching issues that are dominating the PC-TV Tuner market today and that will influence the market for PC-TV Tuners for the next five years, including:

- The influence of the shift from analog to digital content and how that affects PC-TV Tuner sales.
- How the introduction of Microsoft Windows 7 will influence the PC-TV Tuner market.
- The introduction of Microsoft's Protected Broadcast Driver Architecture (PBDA) that will enhance PC-TV Tuner compatibility with encrypted broadcast content.
- The introduction of M-Series CableCards by Ceton.
- The influence of Internet-based content on PC-TV Tuners.
- The challenge to the status quo by PC-TV Tuners originally developed for the mobile market.

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This report also provides new forecasting insights through 2013 including:

- Increased granularity by Tuner type including Analog, Hybrid, and Digital-only Tuners.
- Forecasts for OEM installation of Tuners by Tuner type, including USB built in, PCI/PCIe built in by desktop and notebook form factors by units and by dollars.
- Forecast for aftermarket tuners including Retail Sticks and Add-in Cards by units and by dollars.
- Annual growth rates for each of the above categories.
- Forecasts are further broken down by North America, Europe, Asia, and Rest of World with a totals roll up.

Companies Mentioned in this Report

- Apple
- ATI/AMD
- AverMedia
- Buffalo
- Ceton
- Comcast
- Conexant
- DiBcom
- DirecTV
- Friio
- Hauppauge
- Intel
- I-O Data
- Microsoft
- Microtune
- Mirics Semiconductor
- NEC Electronics
- NXP Semiconductors
- Sanwa
- Sky
- TechniSat

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- Telegent
- TerraTec
- ViXS Systems
- Xceive

Who Will be Interested in This Report?

- Broadcast television industry, including cable, satellite, and OTA broadcasters
- Semiconductor manufacturers involved in the PC-TV Tuner market
- PC-TV Tuner manufacturers

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