China Digital TV Market Operation Report, 2008-2009

By the end of 2008, China had had almost 400 million TV subscribers, of which 164 million are cable TV users and more than 200 million wireless TV users. DTV subscribers just take a small proportion in China. By the end of Mar 2009, China has had 49.86 million DTV users, less than one third of cable TV subscribers.

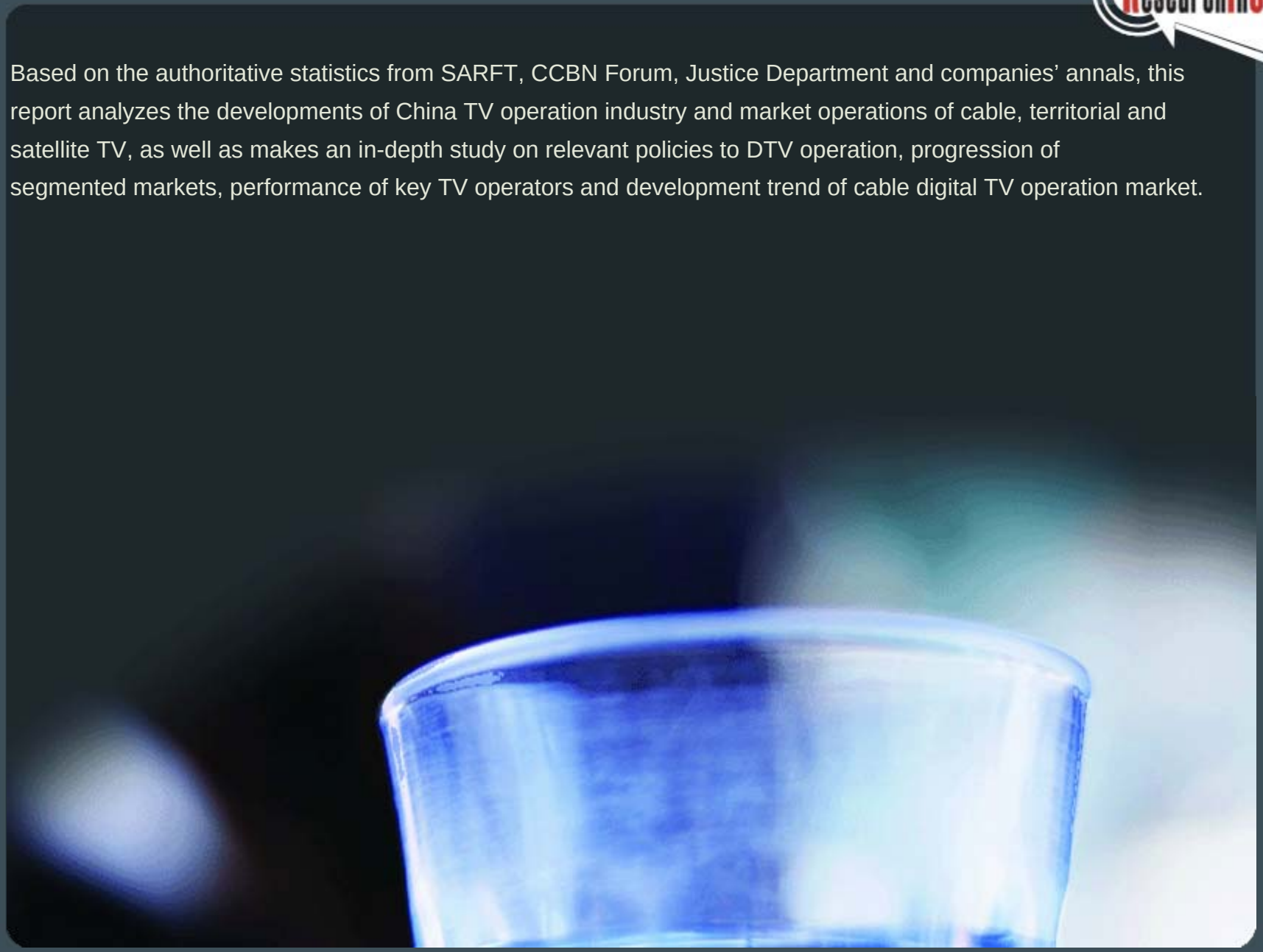
Number of China's DTV Subscribers, 2005-Mar. 2009

Source: SARFT, ResearchInChina

Despite China has a small quantity of DTV users, the number grows rapidly; annual average growth rate exceeded 50% during 2005 to 2008. As scheduled, China will halt analog TV programs before 2015. It is estimated that the growth rate of DTV subscribers in China will rise by above 20% from 2008-2015, calculating by 164 million subscribers up to 2015.

As for digital TV Operation, China sets both terrestrial wireless digital TV and satellite digital TV as the public-interest, while cable digital TV has certain commerciality despite for public service. Operators always promote subscription fee to offset costs on freely providing an STB for each subscriber. At present, subscription charge of per user is between CNY20-26, while the ordinary STB is worth CNY400-800. There is a large gap between China and developed counties in many subscription fee, digitalization level, subscriber scale, etc. With the growth of subscribers and value-added services, Chinese DTV operators will have more opportunities of profit making.

Based on the authoritative statistics from SARFT, CCBN Forum, Justice Department and companies' annals, this report analyzes the developments of China TV operation industry and market operations of cable, territorial and satellite TV, as well as makes an in-depth study on relevant policies to DTV operation, progression of segmented markets, performance of key TV operators and development trend of cable digital TV operation market.



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