

China Digital TV Operation Report, 2009-2010

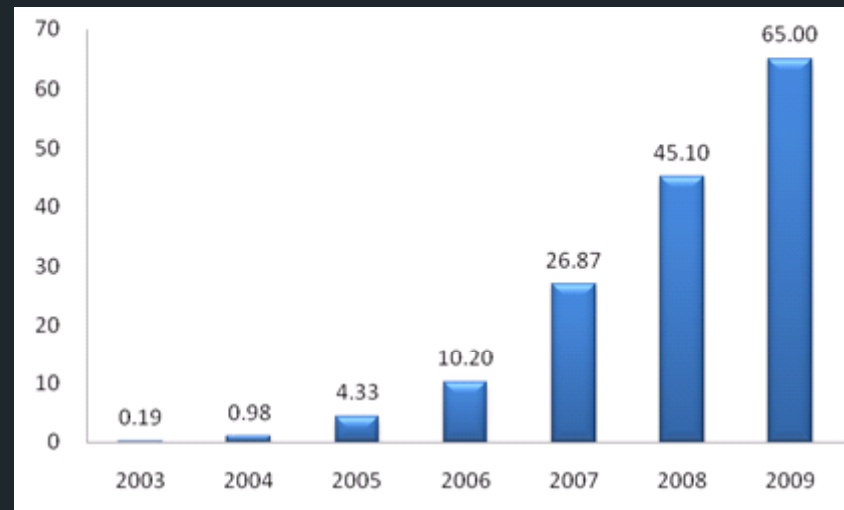


According to the provisions of SARFT, China will carry out digital broadcast and television roundly in 2010, and will halt analog TV programs in 2015. With the approaching deadline, the pace of conversion to DTV speeds up in China. In 2009, China boasted of 174 million cable TV subscribers, including 65 million cable DTV subscribers.

The number of Cable DTV Subscribers in China rose from 190,000 in 2003 to 65 million in 2009. New systems of cable DTV technology have been established in 53 cities and regions across China, and the holistic digital transformation has been completed in 31 ones of these cities. Guangxi, Shaanxi, Jiangxi and Jilin provinces have finished the provincial network integration.

As the year of 2015 draws near, China has accelerated the pace to turn to DTV. In the future, a great number of DTV HD channels and specialized channels will mushroom in China, and Pay-TV will develop further.

Number of Cable DTV Subscribers in China, 2003-2009 (Unit: million)



Source: SARFT, ResearchInChina

In addition to Cable DTV, Terrestrial DTV, Satellite DTV and IPTV have also been developing rapidly.

The development of terrestrial DTV mainly benefits from the expanding demand for mobile DTV driven by the substantial growth of buses, subways and other ways. Only in the first-tier cities, such as Beijing, Shanghai and Guangzhou where tens of thousands of buses exist, terrestrial DTV can generate profit via advertising. Domestic manufacturers failed to apply terrestrial DTV to the buses in second-tier cities, including Suzhou, Hangzhou and Wuxi.

Now, satellite TV services are only allowed to be provided in remote areas in China, so China has no real satellite TV operator. However, the coverage cost, particularly the marginal cost of satellite TV is cheaper than that of CATV and IPTV.

The external policy environment which China's IPTV market is confronted with has not turned favorable, there is still the amounting pressure from the broadcasting system. However, after several years of promotion, the number of subscribers has increased to a certain extent. The IPTV subscribers numbered 2.65 million in 2008, and 4.33 million in 2009 with an increase of 63.4%. In Shanghai, Zhejiang, Guangdong, Jiangsu and other economically-developed areas, the number has been rising rapidly. The number of IPTV subscribers will reach 8.5 million in 2010.

This report analyzes the overall DTV market, market segments, policies, key enterprises, and development trends of DTV industry.

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