

DIGITAL TV TAKING OFF IN THE ASIA-PACIFIC REGION

- MORE THAN 56 MILLION TV HOUSEHOLDS (ALMOST **10%** OF TOTAL TV HOUSEHOLDS) IN THE ASIA PACIFIC REGION RECEIVED DIGITAL SIGNALS AT THE END OF 2005
- IPTV AND MOBILE TV ARE HOT ISSUES. BUT, WHILE THE NUMBER OF TRIALS FOR THESE SERVICES MULTIPLY, IN THE NEXT TWO YEARS SATELLITE AND CABLE TELEVISION WILL LEAD THE GROWING TAKE-UP OF DIGITAL TV

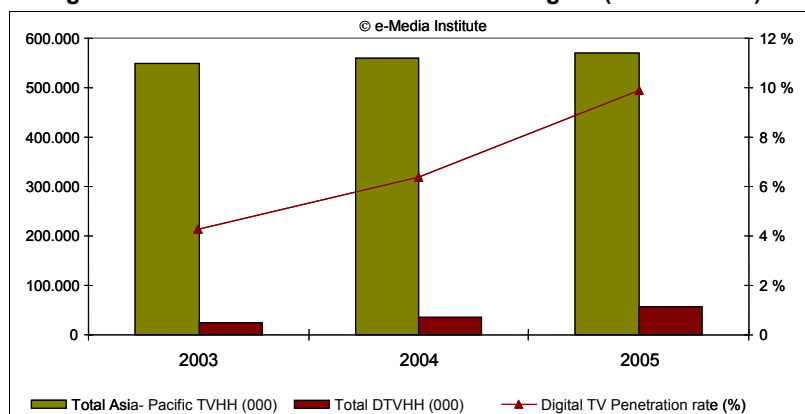
According to the latest estimates from e-Media Institute, the total number of Digital Television Households (DTVHH) in the Asia Pacific region has reached the figure of 56.3 million (around 10% of Total TV Households). More than 30 million DTVHH (53% of total DTVHH) receive TV services by satellite or cable unlawfully. Due to these high figures, digital channels are able to achieve a critical mass of viewers even in those regions where satellite Direct-To-Home (DTH) services are not allowed by the government but often tolerated.

With a 57% penetration rate of DTVHH, Hong Kong leads the Top 10 list of Asia-Pacific countries with regards to digital TV penetration. Malaysia follows in second position with a 48.6% penetration rate (see the table: http://www.e-mediatechnology.com/top10digitaltvasiapacificcountries_en.content)

With some exceptions, the digitalisation process of cable TV networks is still going slow in Asia-Pacific countries and satellite DTH platforms are the main digital services in most of these countries. This look sets to change from 2006 onwards.

In selected countries (China, South Korea, Japan and India), the convergence between telecommunications and television services seems to be on the verge of a digital big bang. With a high penetration rate of broadband connections and mobile services, South Korea is most likely to be one of the countries to lead industry convergence at a worldwide level. However, with its sheer size and dramatic economic growth China will dominate the scene in the Asia-Pacific region.

Digital TV Households in the Asia-Pacific region (2003 to 2005)



Source: e-Media Institute (February 2006)

IPTV and Mobile television trials are attracting broadcasters and content providers but in the next two years satellite and cable television will lead the expected growing take-up of digital television in the region.

Total DTVHH are expected to rise exponentially in the Asia-Pacific region in the future. However, continued economic growth, stability and significant investment in infrastructure are requisites for continued future growth in the Digital TV market in Asia-Pacific countries.

Thanks to a growing network of research correspondents e-Media Institute carries out a number of Research Programmes on the television markets in the Asia Pacific region, providing detailed analysis and forecasts.

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