

AVG

**TRUYỀN HÌNH
AN VIÊN**

Market of Digital Broadcasting In Vietnam

Audio Visual Global JSC (AVG), Vietnam

July, 2013

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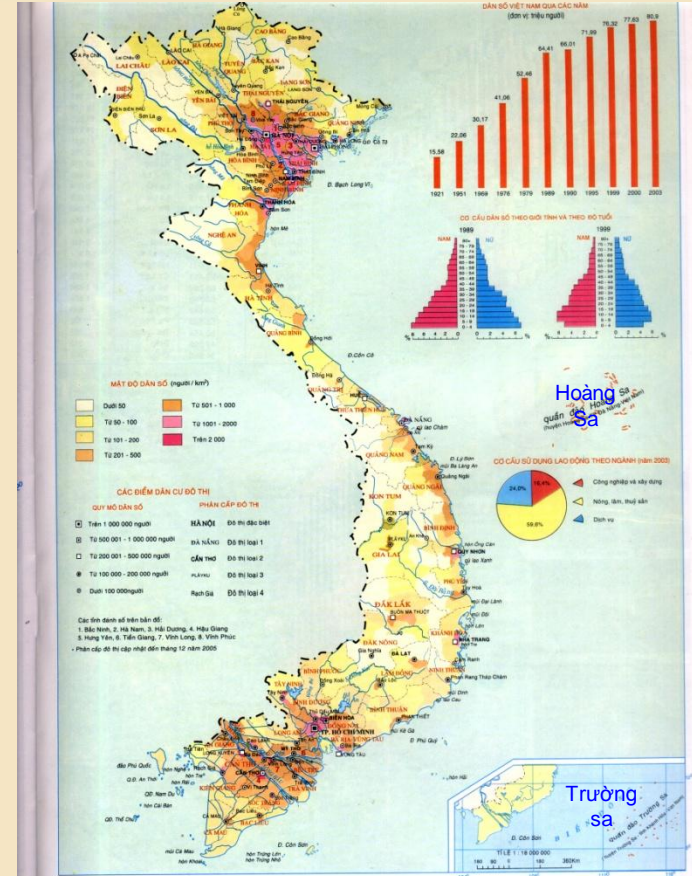
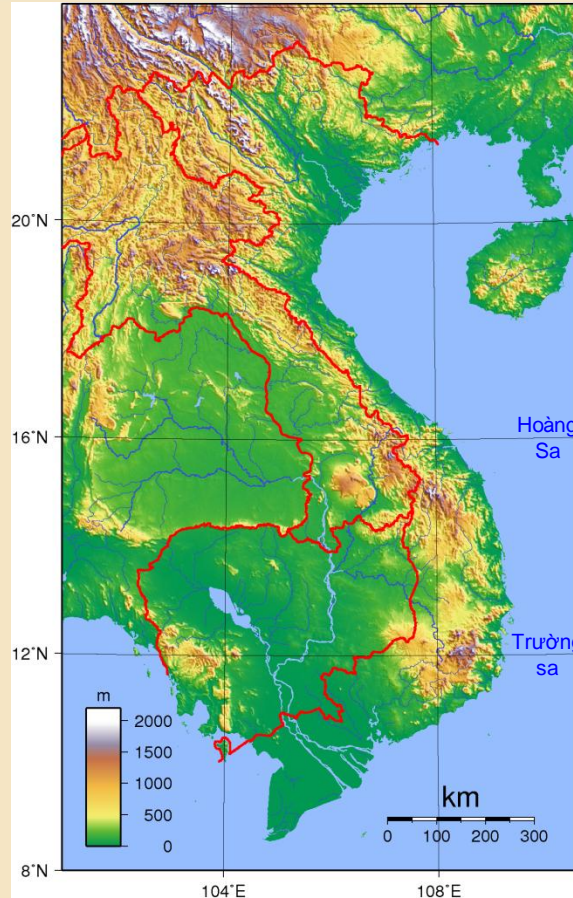


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1. Country Brief



- ✓ **Population:** ~90 millions
 - **Red River Delta:** ~24 mil
 - **Mekong River Delta:** ~30 mil
- ✓ **GDP:** ~ 1540 USD/capita



2. Current Broadcasting

➤ 67 Terrestrial Broadcasters

- 04 Nationwide Broadcasters



- 63 Local Broadcasters



2. Current Broadcasting

➤ 04 Satellite Broadcasters (DTH)



➤ More than 40 Cable Television Companies



2. Current Broadcasting

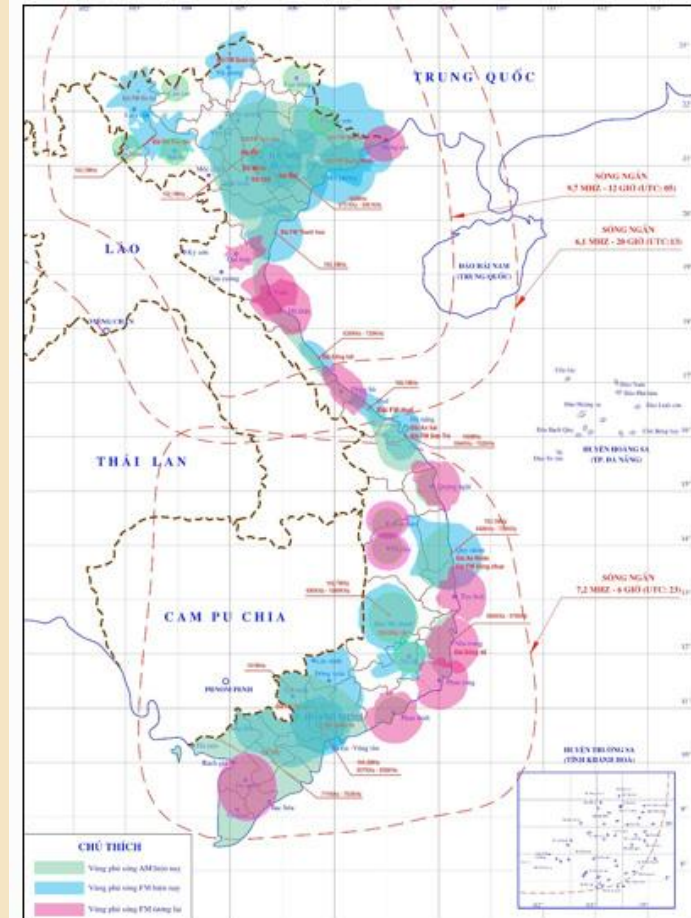
- **Television Service** : Consumers today can choose from more than 170 differences TV channels (~20 HDTV) via
 - Analog TV (VTV, VTC and local broadcasters)
 - DTT (VTC, AVG, VTV)
 - DTH (AVG, K+, VTC, HTV)
 - Cable TV (VTVcab, BTS, SCTV, HTVC)
 - IPTV (VNPT, Viettel, VTC, FPT)
- **Radio Service** : Consumers today can choose
 - AM and FM services from VOV
 - Some other services from several Local Broadcasters (FM only)

2. Current Broadcasting

- ✓ Established 1945
- ✓ Broadcasting networks:
 - AM Radio for FTA
 - FM Radio for FTA
 - Analog TV (VOVTV) for FTA



Đơn vị thực hiện: Ban kỹ thuật phát thanh



2. Current Broadcasting



VOV antenna Towers : AM and FM, VOVTV



2. Current Broadcasting



- ✓ Established 1970
- ✓ Broadcasting networks:
 - Analog Television for FTA
 - DVB-T2 trial for FTA
 - DTH for Pay TV
 - Cable TV for Pay TV
 - T-DMB trial
- ✓ Analog Transmitters: Total: 122
 - VTV1: 46
 - VTV2: 26
 - VTV3: 40
 - VTV6: 10
- ✓ DVB-T2 transmitters: 01 in Hanoi, 01 in HCMC
- ✓ Cable, DTH:
 - Cable: VCTV, SCTV (Analog and Digital)
 - DTH: VSTV (Digital)



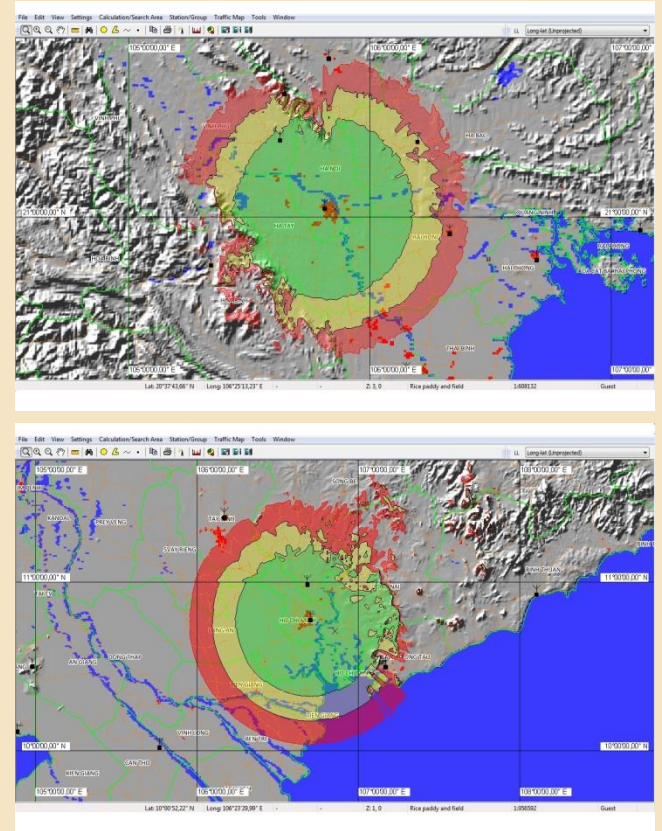
2. Current Broadcasting



Uplink antenna for DTH



Analog and DTT Tower

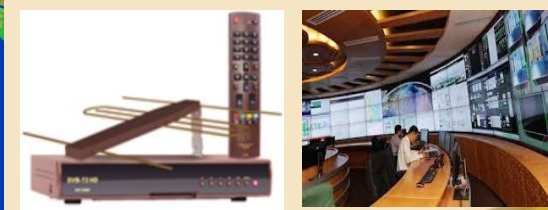
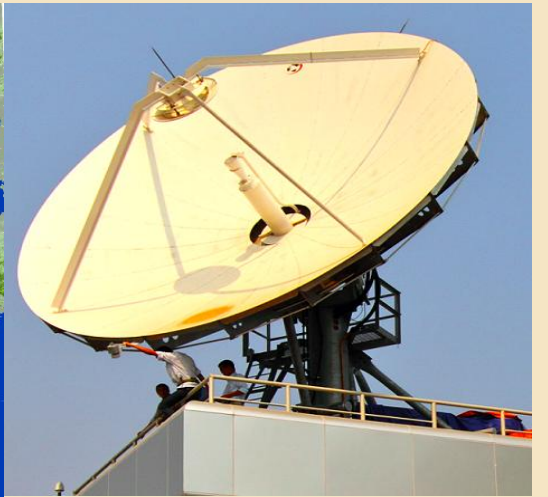
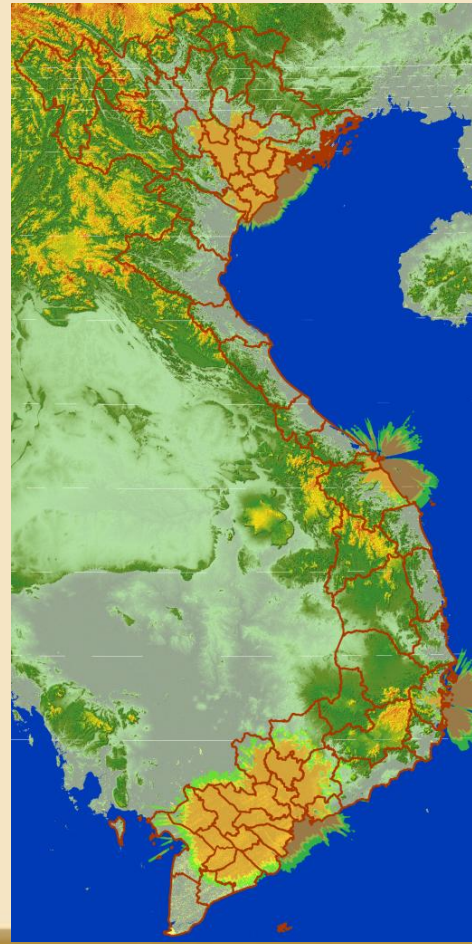


DVB-T2 coverage 2013

2. Current Broadcasting



- Established 2008
- Broadcasting networks:
 - DTT (DVB-T2, SFN) for PayTV
 - DTH Network for PayTV

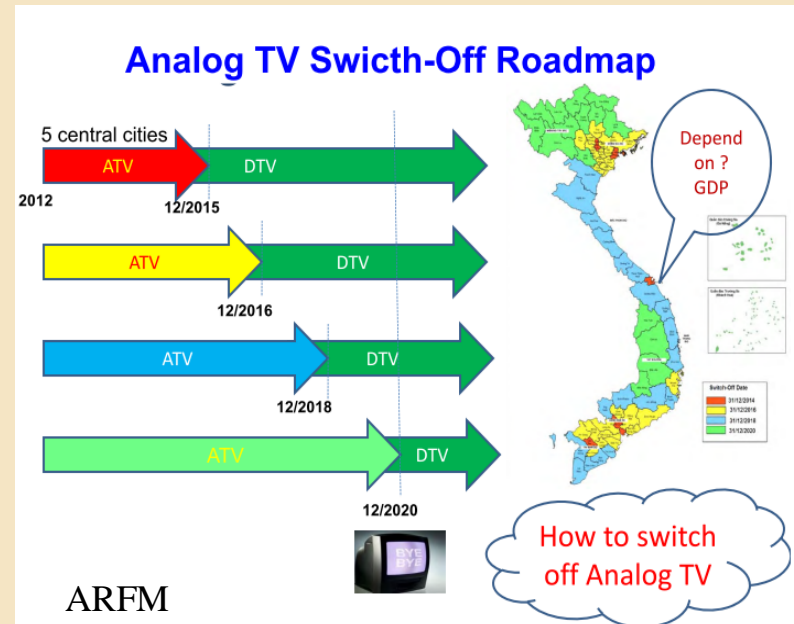


2. Current Broadcasting

➤ Digitalization Roadmap

❖ Television digitalization

- Before 12/2015 will shut down Analogue signals at 5 Biggest Cities
- Before 12/2020 will shut down Analogue signals in the whole country

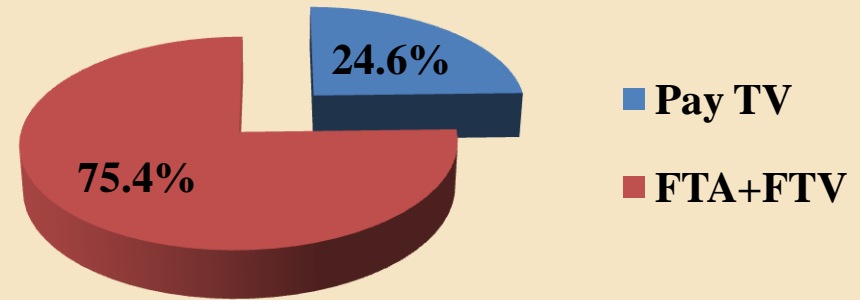
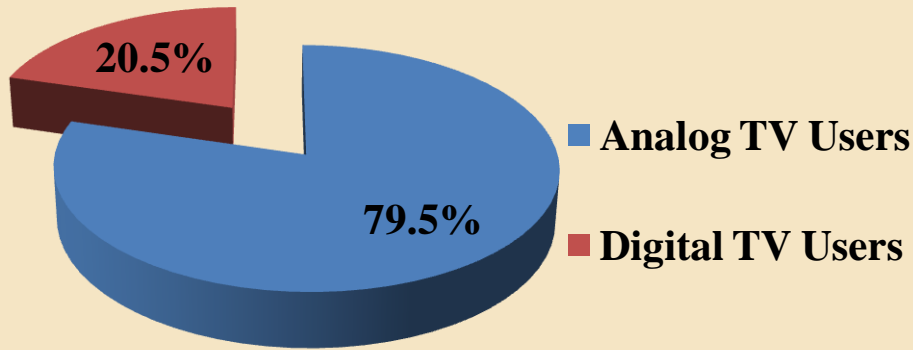


❖ Radio digitalization

- Encourage transition to digital radio broadcasting before 2020

3. Digital Broadcasting Market in Vietnam

3.1 Digital Television Broadcasting

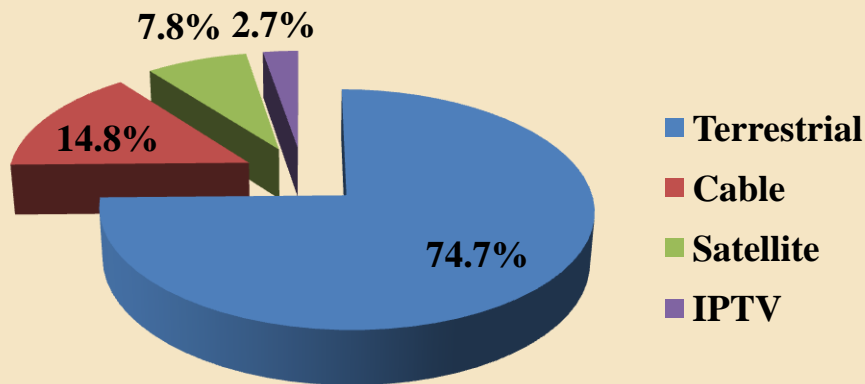


Total TV Users 22 mil

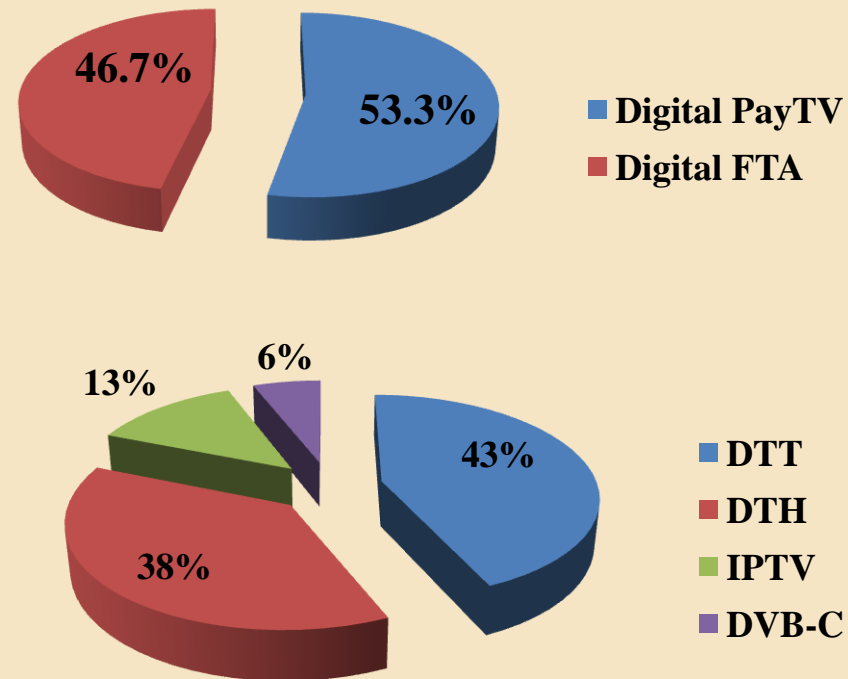
3. Digital Broadcasting Market in Vietnam

3.1 Digital Television Broadcasting

Total Market share












Digital Market share



3. Digital Broadcasting Market

3.1 Digital Television Broadcasting

Service provider		Channels	Fee/month
	DTH	81	12,86USD
	DTH	72	4,76 USD
	DTH DTT	114 77	4,19 USD
	Cable	133	12,71 UDS
	Cable	108	12,38 USD
	Cable	90	7,38 USD
	Cable	87	12,38 USD
	IPTV	84	6.87 UDS
	IPTV	85	8.57 USD

3. Digital Broadcasting Market in Vietnam

3.1 Digital Radio Broadcasting

- AM Radio: broadcast information of Vietnam Government and State to people in mountainous, remote areas and islands, with AM radio receiver about millions devices
- FM Radio: broadcast focus to listeners in the high density residential (rural, sub urban, cities) with many news programs and special music which attract many listeners (in-car, mobile phone, fix reception,...)

3. Digital Broadcasting Market in Vietnam

3.1 Digital Radio Broadcasting

➤ Digital Radio:

- 2005 VOV trial DRM standard
- 2009 VOV trial HD Radio
- 2010 VTV Broadcom trial T-DMB services with radio channels using VHF band
- 2011 PTIT study of Digital Radio Technology and application in Vietnam (concentrate of DAB/DAB+)
- Vietnam currently still in the process of selection of digital radio standards, and
- Government encourage transition to digital radio broadcasting before 2020

4. The Trend of Digital Broadcasting Market in Vietnam

1. Digital TV market will strongly increase in the next few years!
2. Digital Radio market is still open!

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Thank you for your attention!

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