

# ASTRA – driving Growth in HDTV

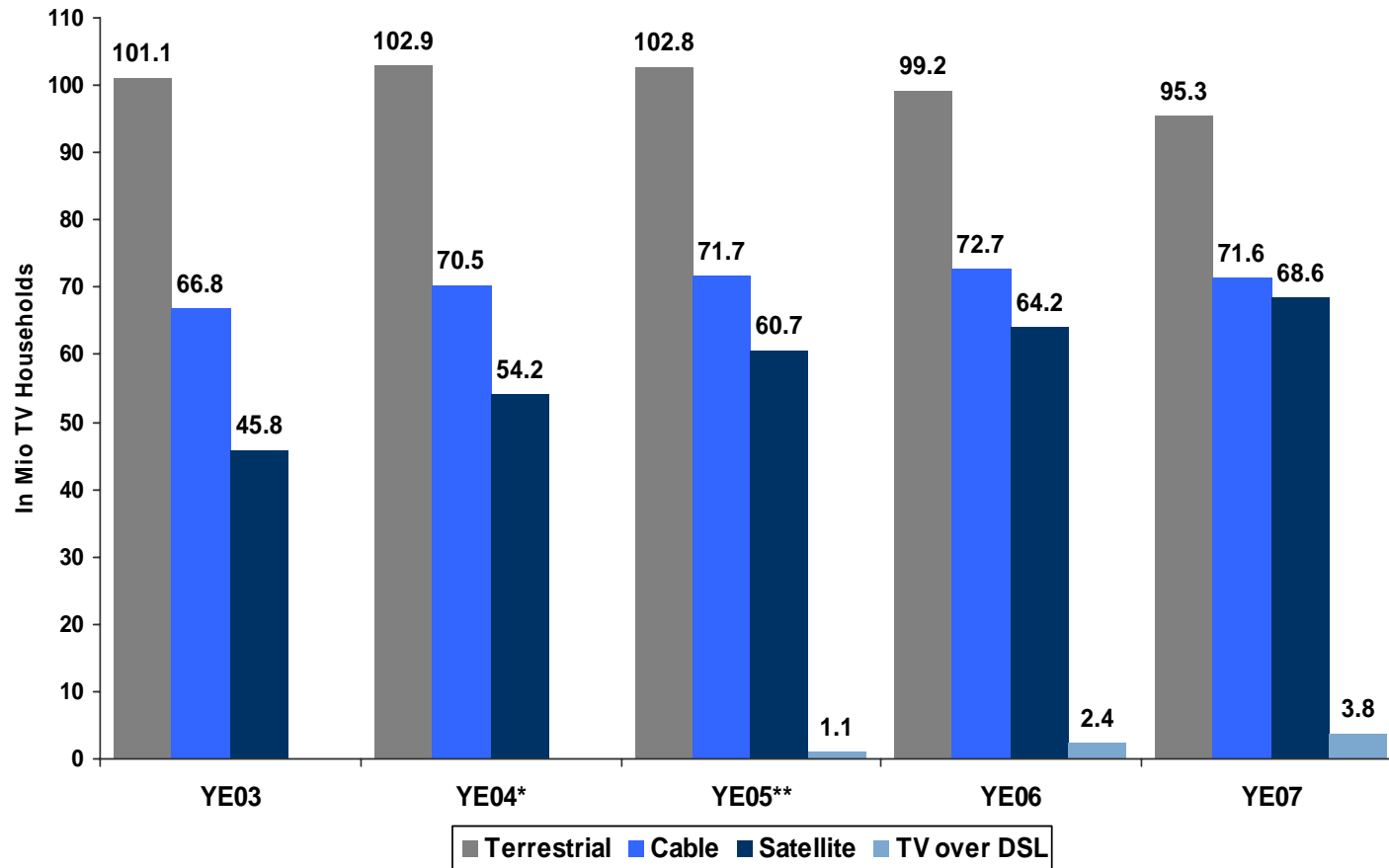
Bitkom Intellect  
HDTV across Europe

Wolfgang Elsäßer  
Managing Director ASTRA Deutschland

The Quality Link

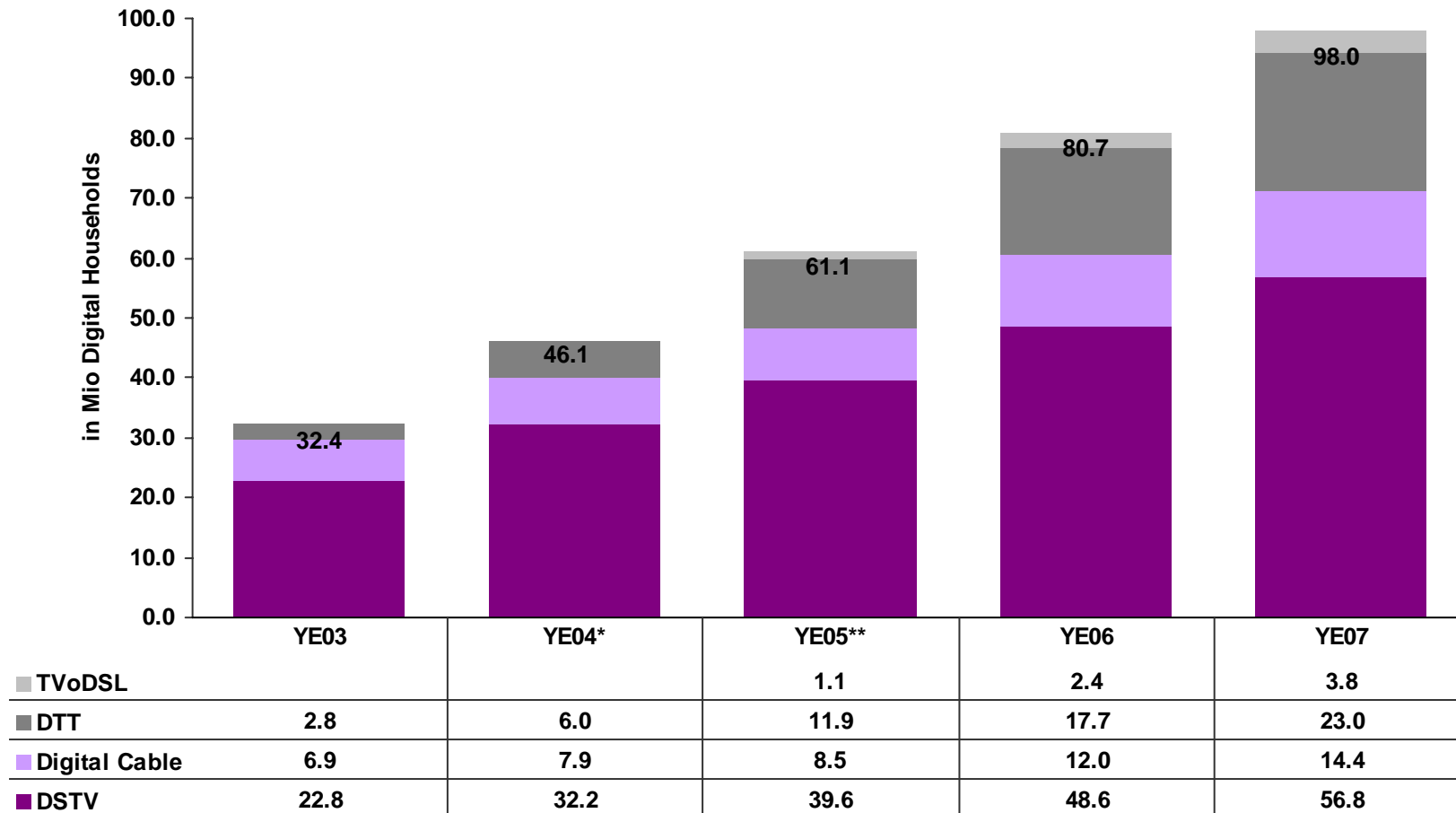
1. **Digitalisation required**
2. Key Countries for High Definition
3. Drivers for a successful HD story
4. “Lessons learned”

# Satellite Reception: +50% over 5 years



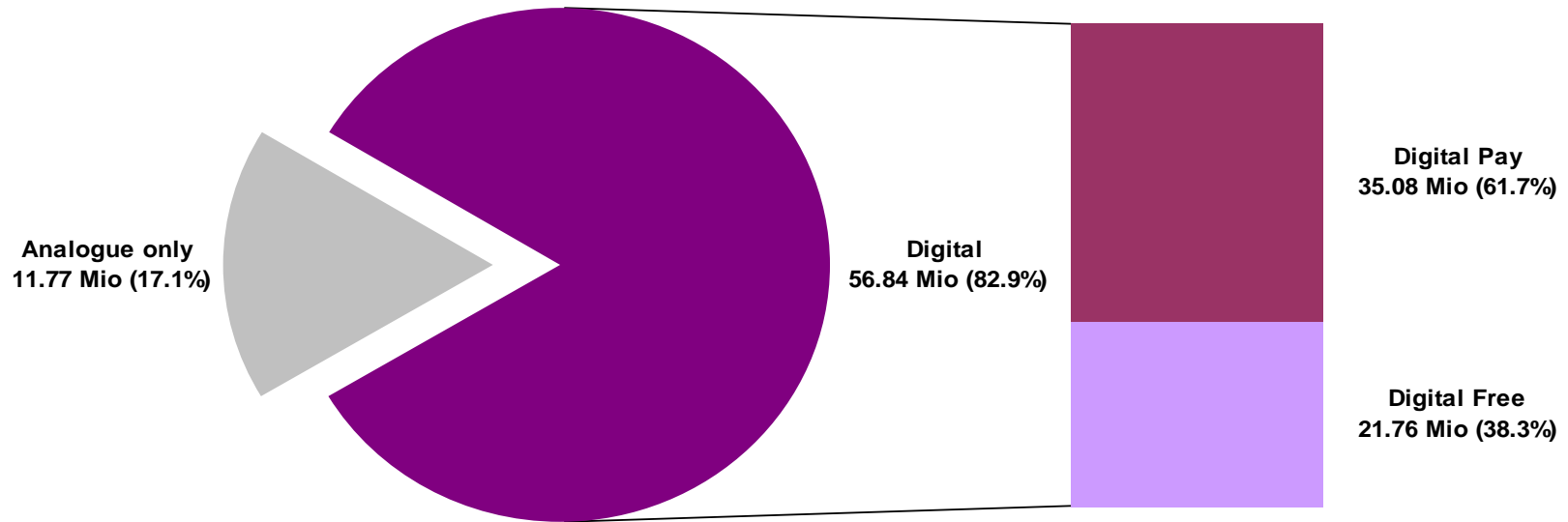
\*incl. 4 additional countries: Bosnia, Serbia, Morocco and Tunisia; \*\*incl. 1 additional country: Algeria  
Source: SES ASTRA, Satellite Monitors

# Satellite is Key Driver of digital TV



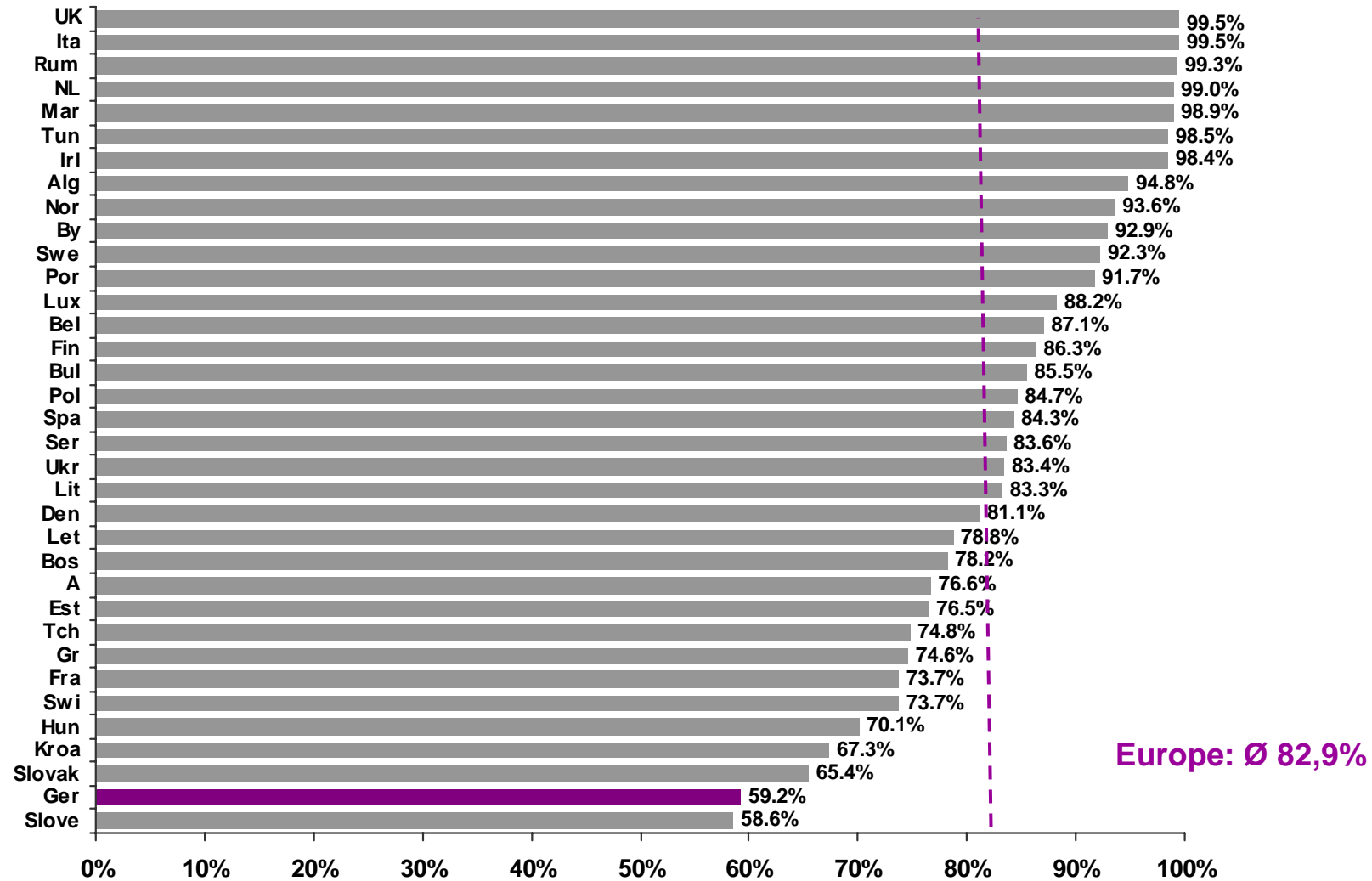
\*incl. 4 additional countries: Bosnia, Serbia, Morocco and Tunisia; \*\*incl. Algeria  
Sources: SES ASTRA, Satellite Monitors

# 83% of Satellite Reception in Europe is digital



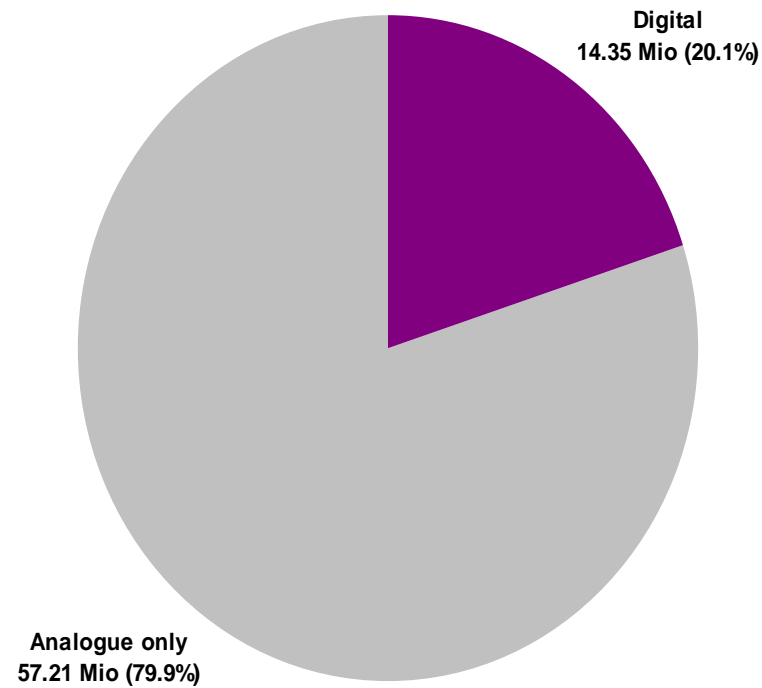
Base: 68.60 Mill. DTH/SMATV Households  
Source: SES ASTRA, Satellite Monitors

# Digital Reception within Satellite Households



Base: SES ASTRA, Satelliten Monitore

# Only 20% of Cable Reception is digital



Base: 71.56 Mill. Cable Households  
Source: SES ASTRA, Satellite Monitors

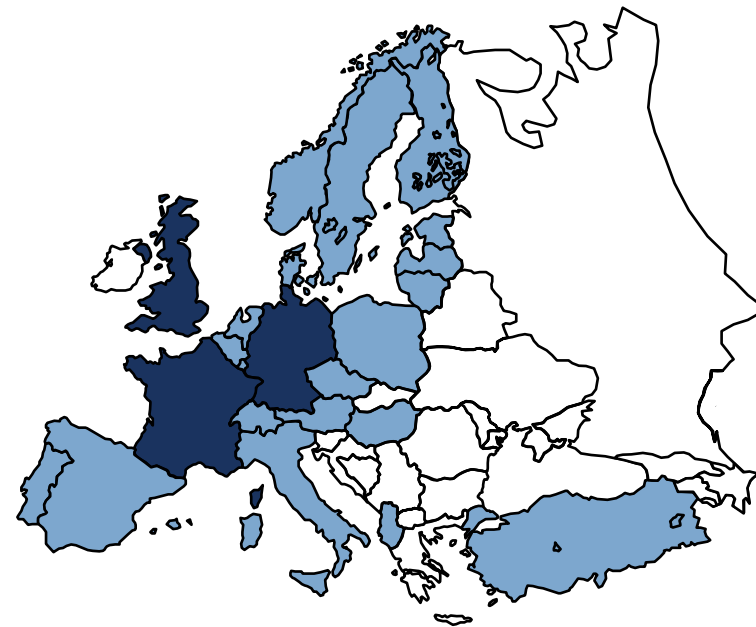
- Expected to grow and further develop
- Neutral and open technical platform
- Enabler for various contents and services
- Digital Satellite fits customer's needs
  - Broadcasters prefer direct-to-home relationship
- Digital Satellite fits consumer's needs
  - Largest quantity and variety of channels

1. Digitalisation required
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# HD viewers on ASTRA MY 08

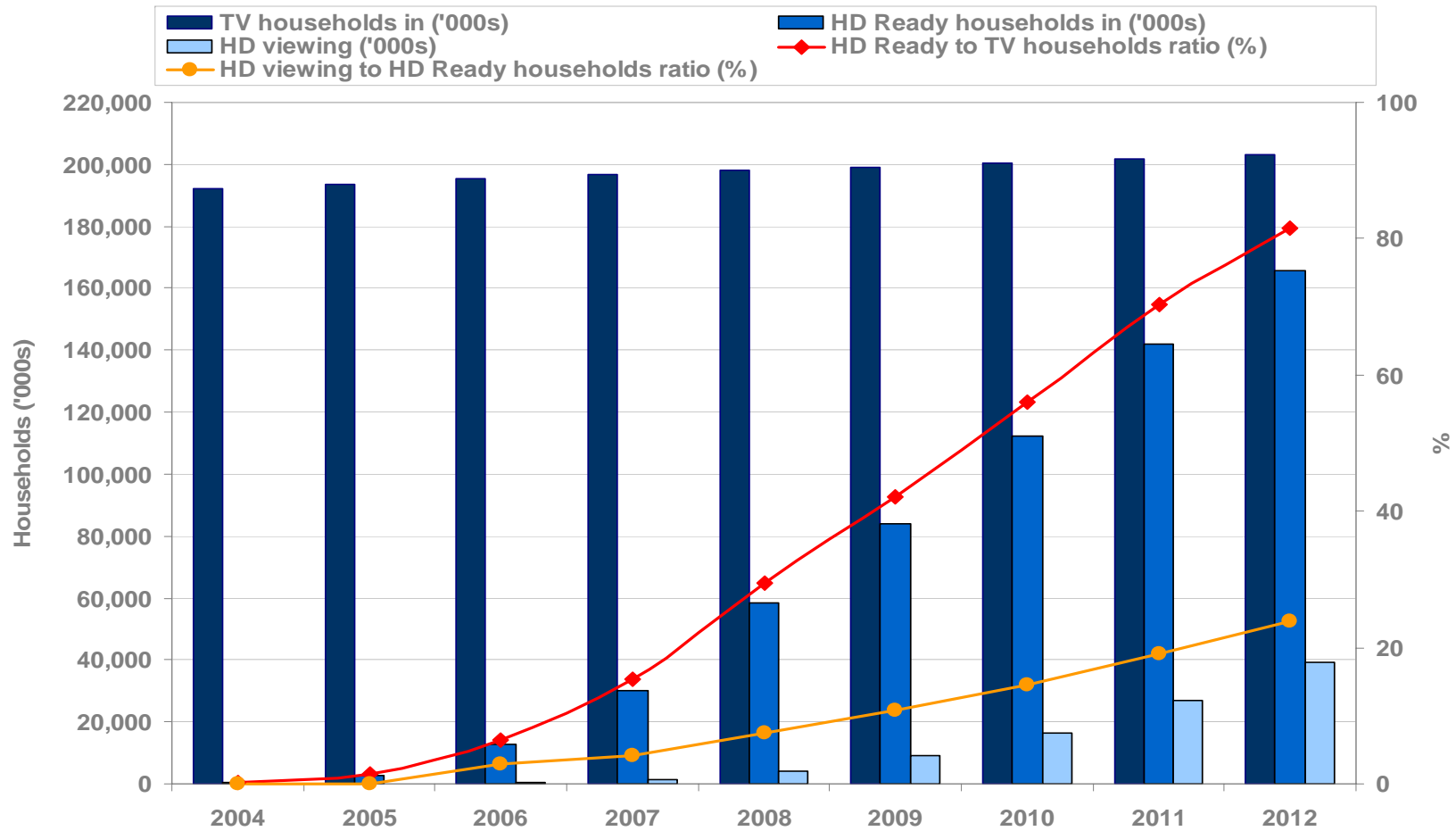


- United Kingdom
  - BSkyB: **550,000** subscribers
  - FreeSat: ~ **50,000** HD MPEG4 STB's
- Germany
  - Premiere: **120,000** subscribers
  - Free-to-air: > **250,000** viewers
- France
  - Canal+ Group: **120,000** subscribers
  - TNTSAT: **50,000** HD MPEG4 STB's
- Other markets
  - **150,000** HD subscribers and viewers in Austria, Benelux, Czech Republic, Nordic Countries, Poland, Spain



Sources: Dataxis, GfK Retail and Technology, Industry estimates (July 2008)

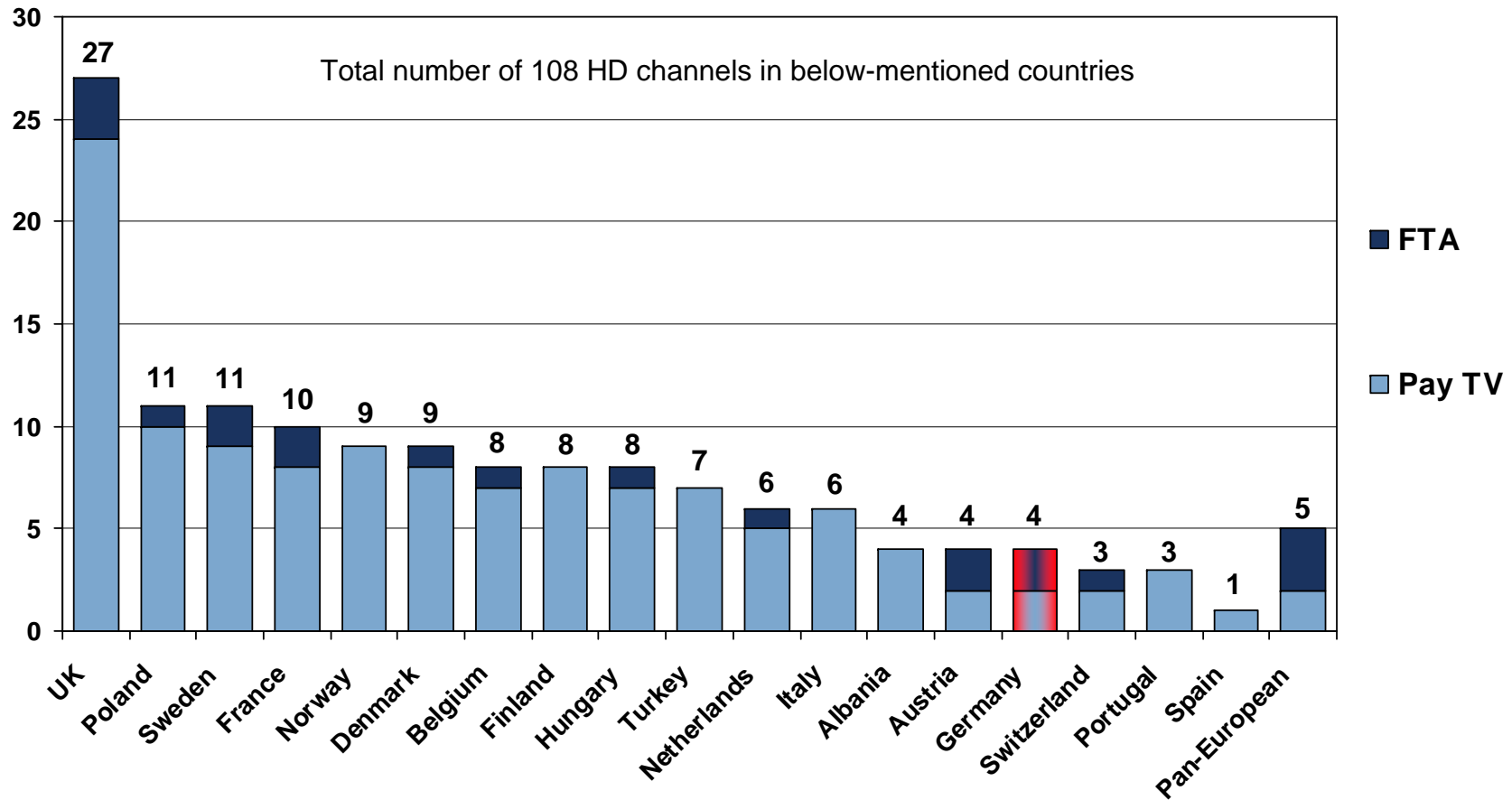
# HD Households and HD viewing in Europe



Source:  
Countries:

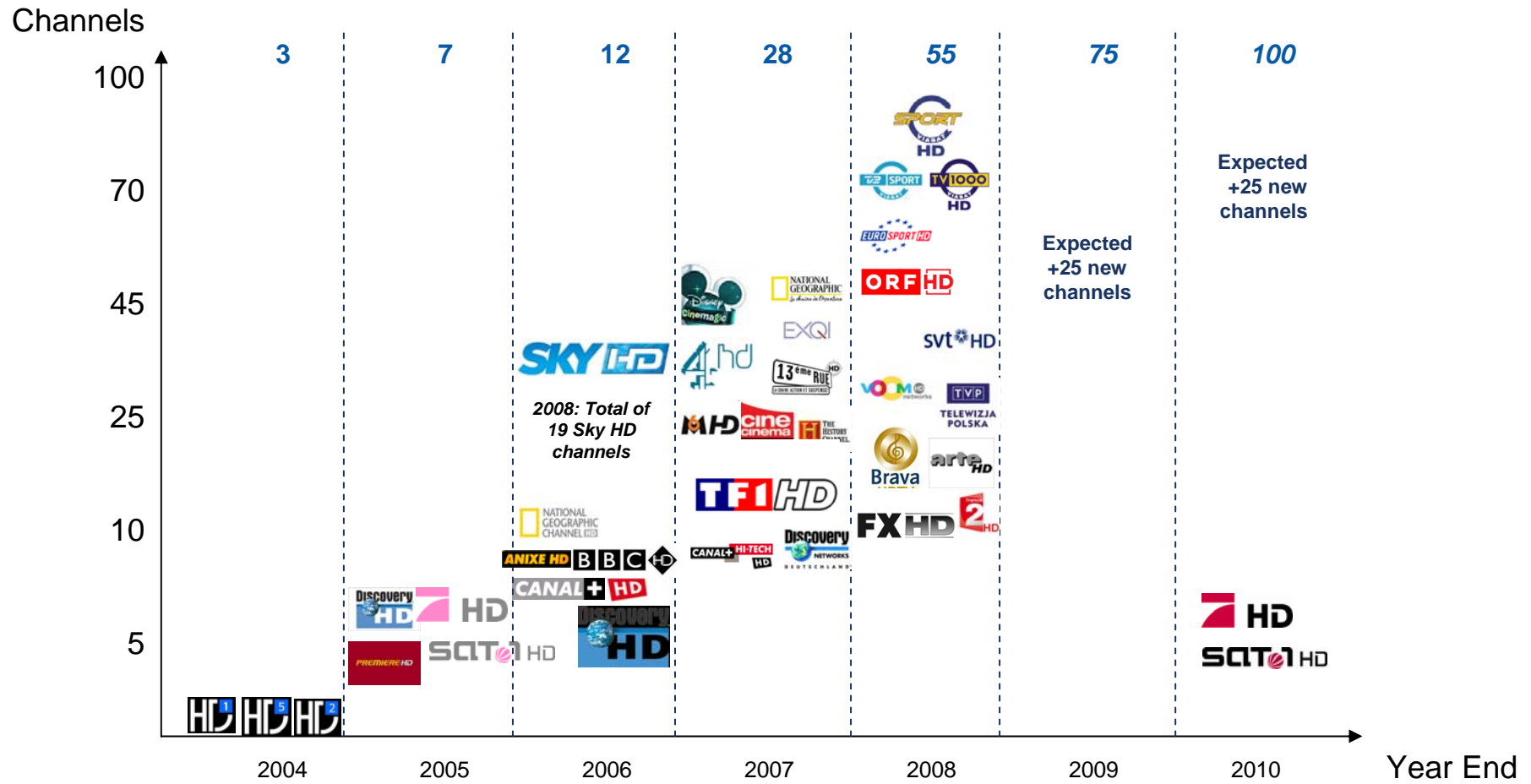
Screen Digest, September 2008  
Europe excluding Russia and Turkey

# Available HD Channels in Europe

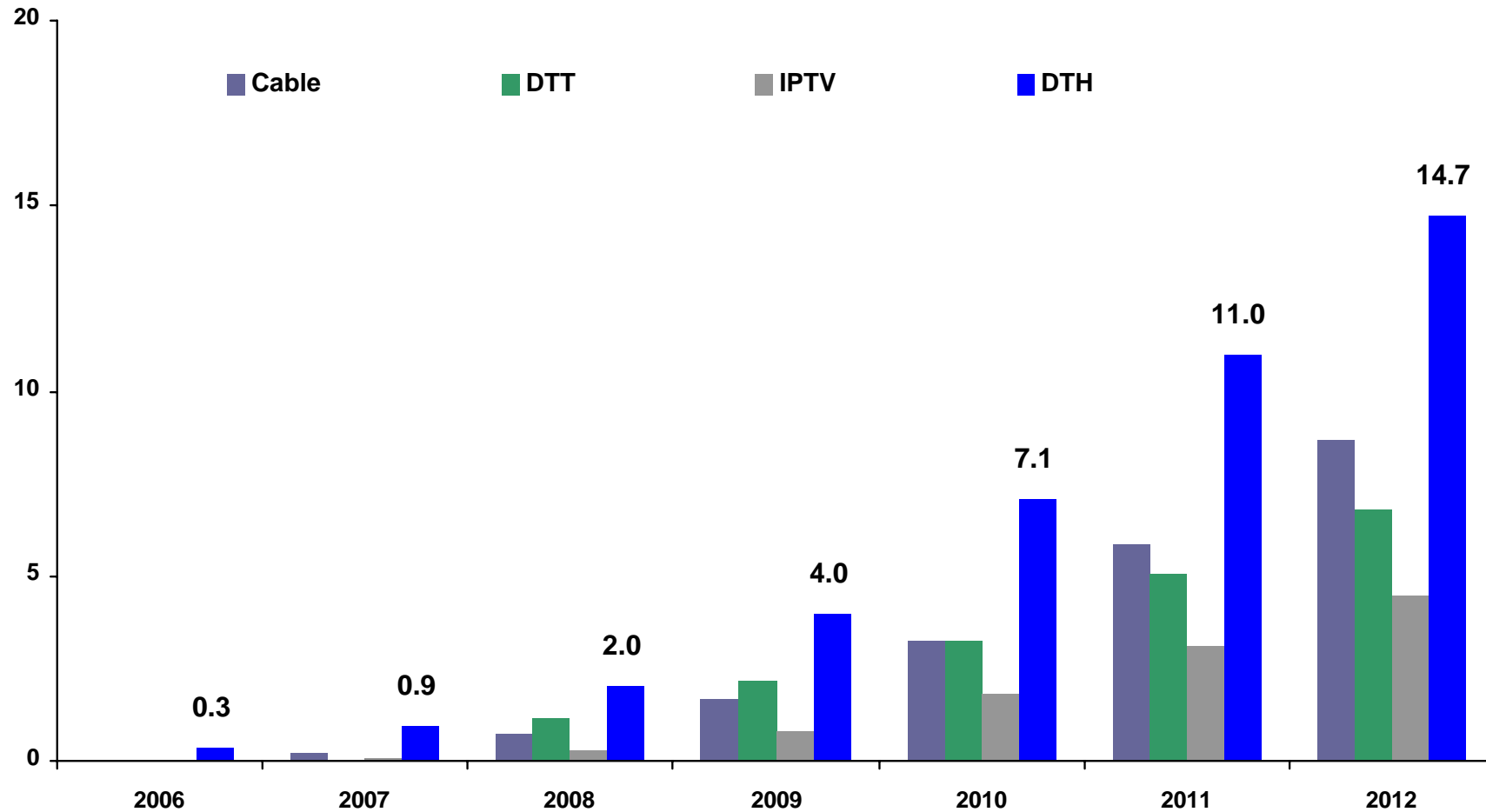


Source: Screen Digest (September 2008), <http://www.lyngsat.com> (September 2008), excluding simulcast and promotional TV channels

# HD Content Availability



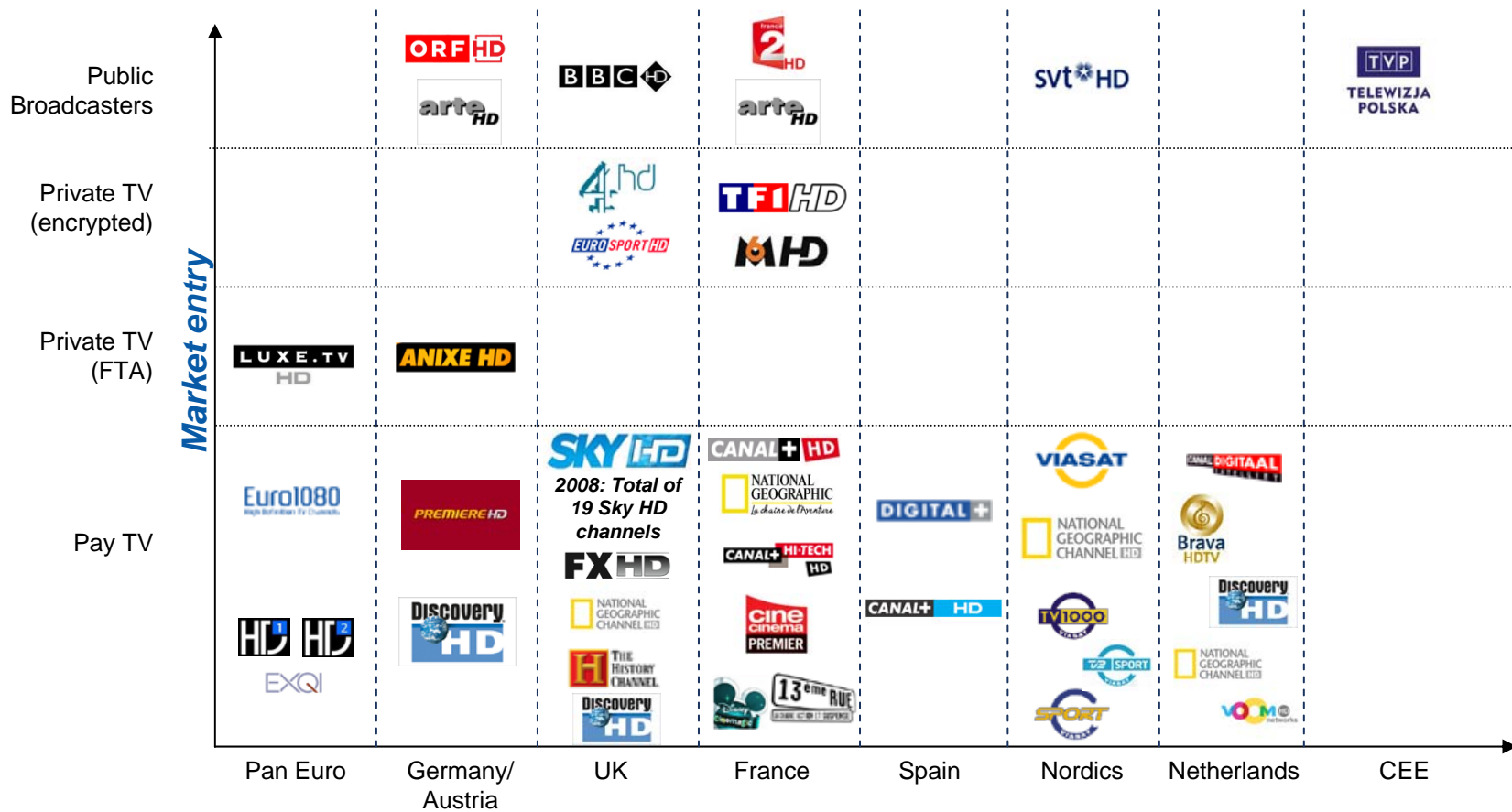
# Satellite stays largest High Definition platform



Source: Screen Digest, July 2008  
Countries: Europe excluding Russia and Turkey  
DTH – Astra: AT, BE, DE, ES, FR, GB, IE, NL, EST, H, RO, SK, SLO, CZ, DEN, FIN, SWE  
DTH – others: CH, IT, PL, PT

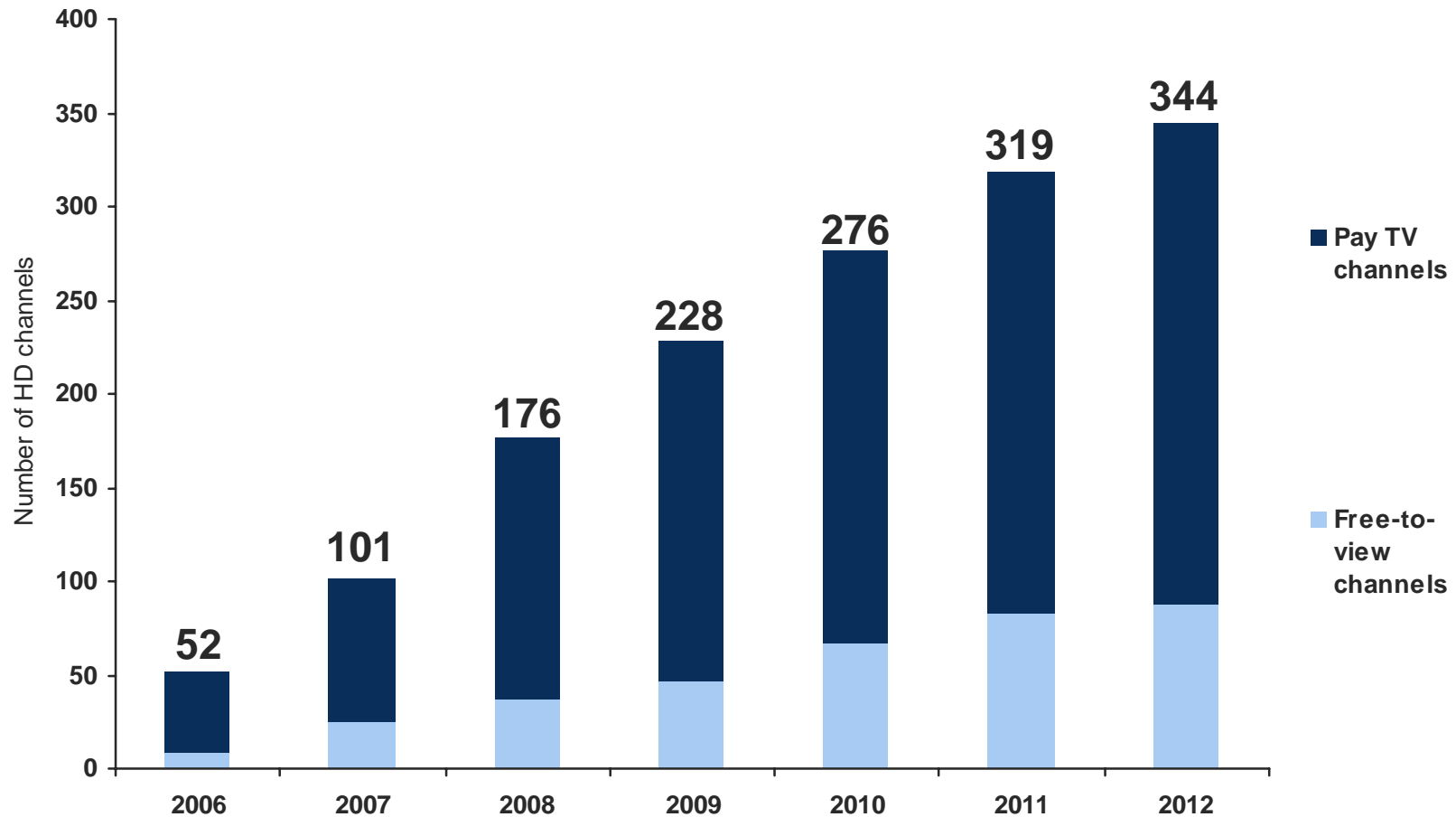
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# HD Growth Pillars - Business Models



HD Channels on ASTRA, Status: Q2 2008

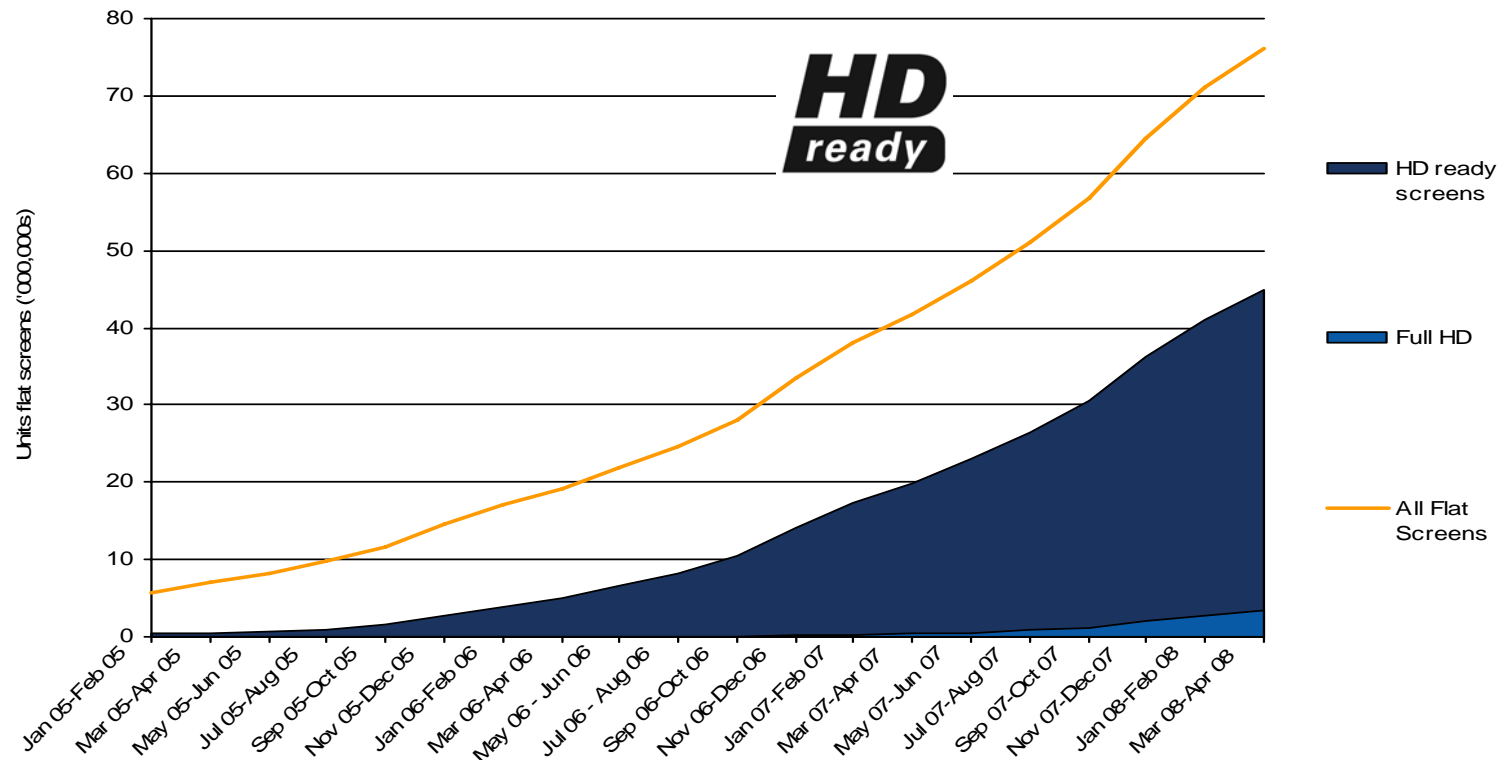
# HD Content Availability



Source:  
Europe:

Screen Digest, July 2008  
AT, BE, DE, ES, FR, GB, IE, NL, EST, H, RO, SK, SLO, CZ, DEN, FIN, SWE, CH, IT, PL, PT

# Consumer Readiness – HD ready TVs



Screen Digest  
 Forecast July 08:  
 165 Mio TV homes in  
 Europe

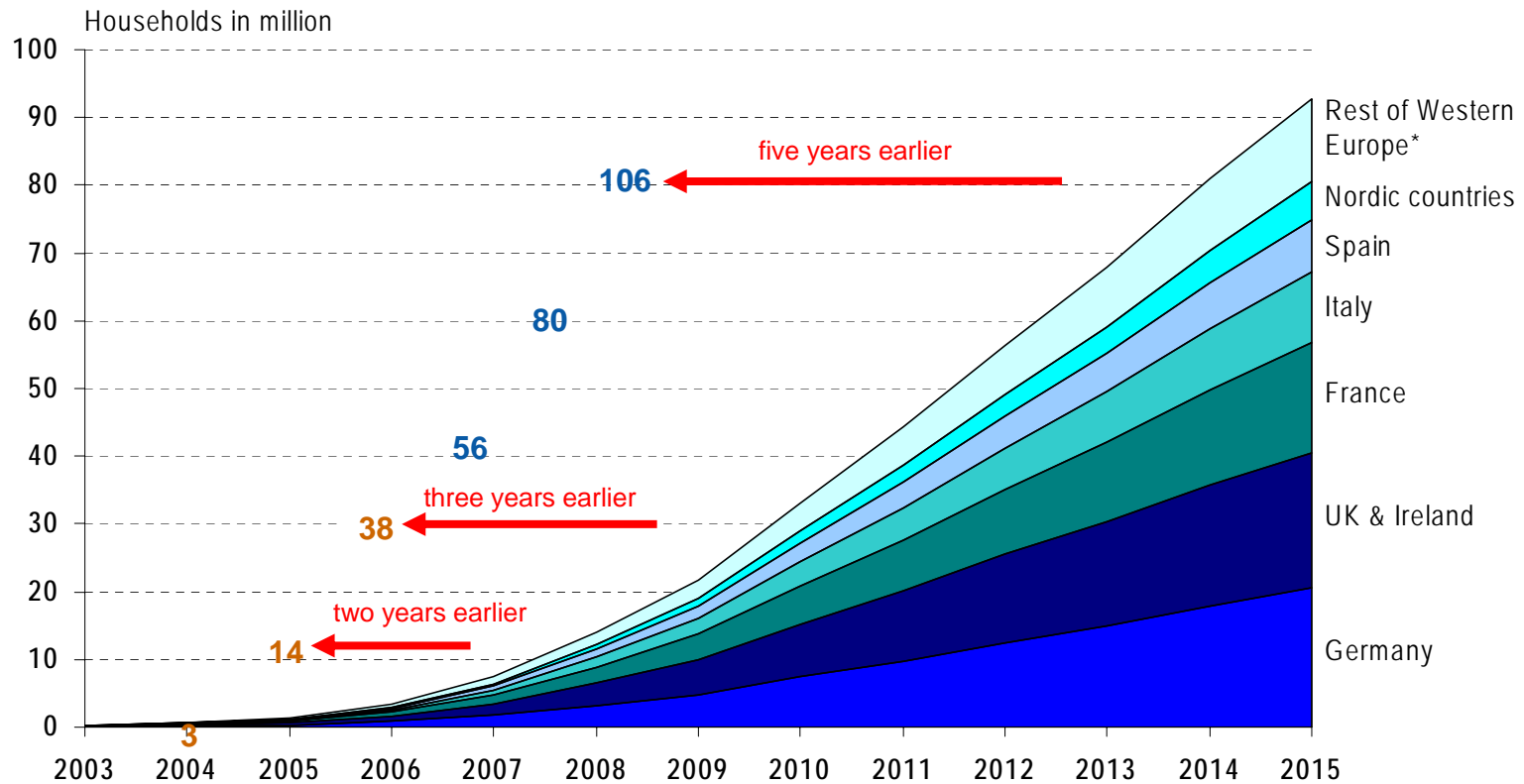
Source: GfK Retail & Technology, April 2008  
 Type of Screens: LCD, Plasma, Rear projection  
 Europe: AT, BE, CZ, DEN, FIN, FR, DE, GR, H, IT, NL, PL, PT, SVK, ESP, SWE, CH, GB

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# High Definition Equipment exceeds Estimates



Forecasts of Households equipped with HD-enabled TV sets in Europe (2003-2015)



\* Includes Austria, Belgium, Greece, Luxemburg, Netherlands, Portugal and Switzerland

<http://www.euroconsult-ec.com>

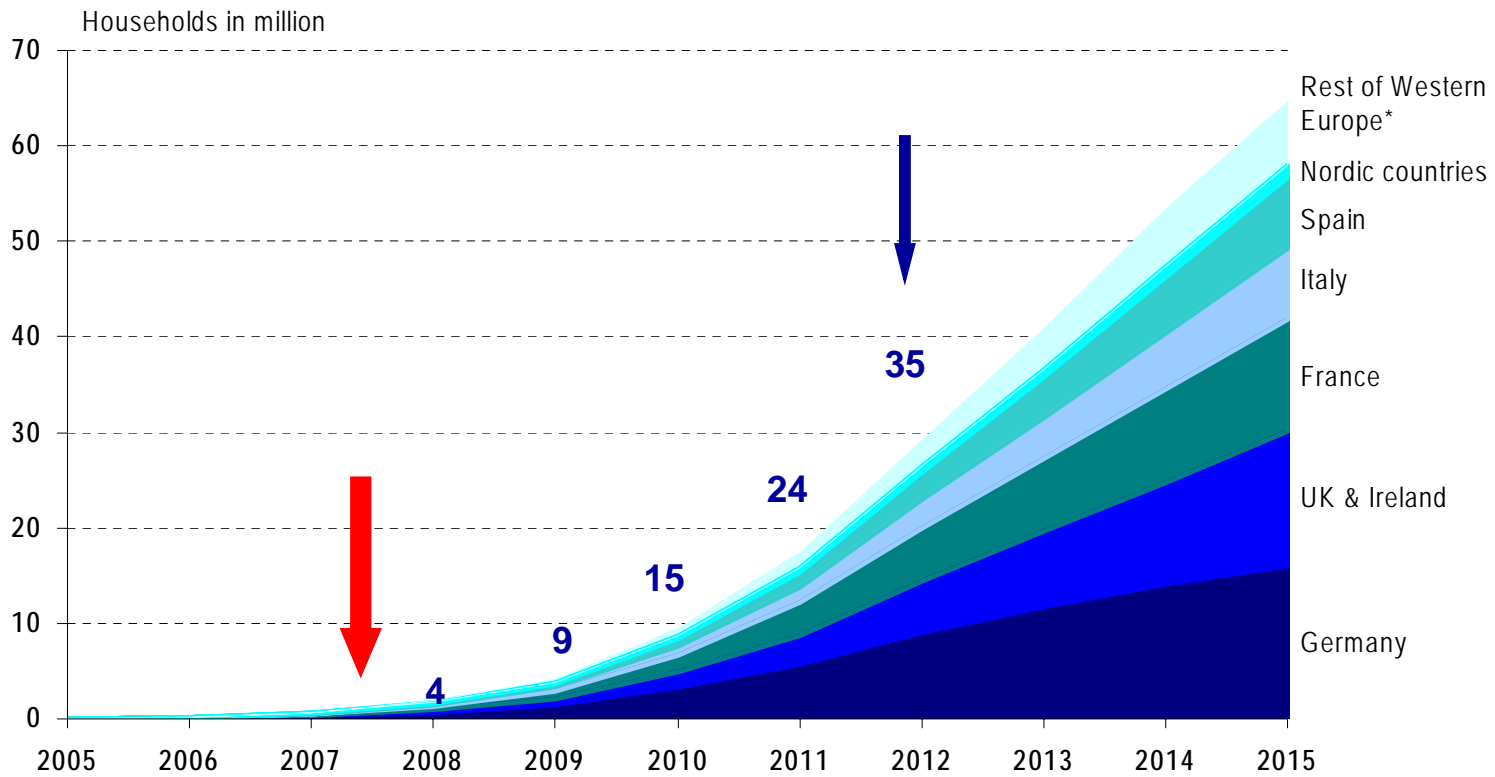
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Red Font: Actual HD ready sales in Europe in mio Source: GfK Retail and Technology April 08  
 Blue Font: Screen Digest Forecast July 08  
 Screen Digest Forecast July 08: 165 Mio TV homes in Europe

# Consumer Readiness



Forecasts of Households equipped with HD receivers in Europe  
Breakdown by country  
(2005-2015)



\* Includes Austria, Belgium, Greece, Luxemburg, Netherlands, Portugal and Switzerland

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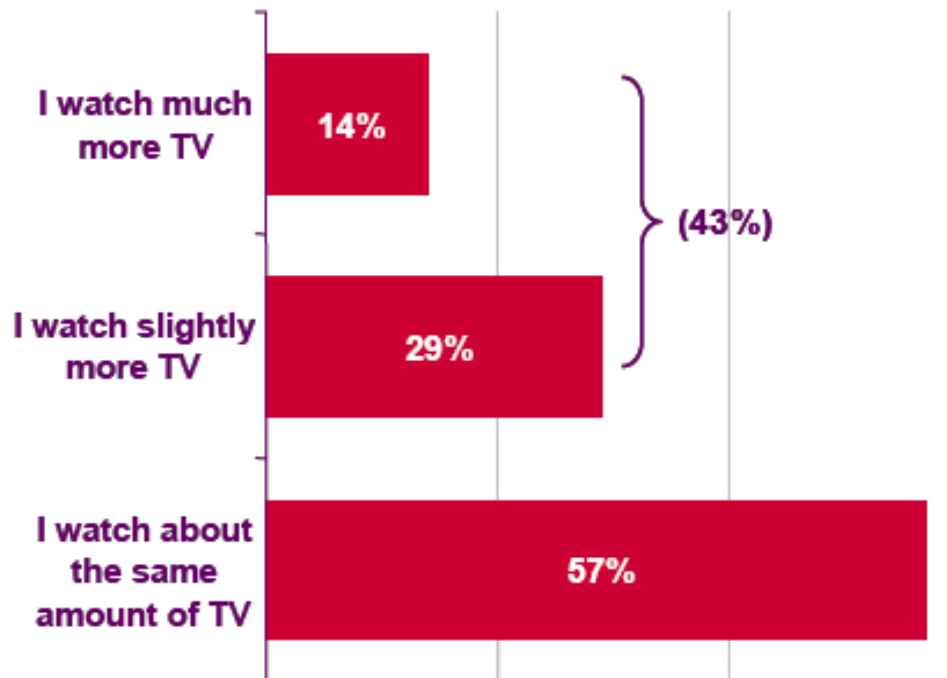
Blue Font: Screen Digest Forecast July 08  
Screen Digest Forecast July 08: 35 Mio HD viewing TV homes in Europe

# HD Key Enablers - Consumer Demand (UK example)



Since subscribing to HD TV, do you find that you personally watch more or less TV?

Main reason, %



Number of hours watch more TV for	n=150 %
3 hours or less	31%
4-5 hours	32%
6-10 hours	21%
11 hours +	15%
Average	8 hours

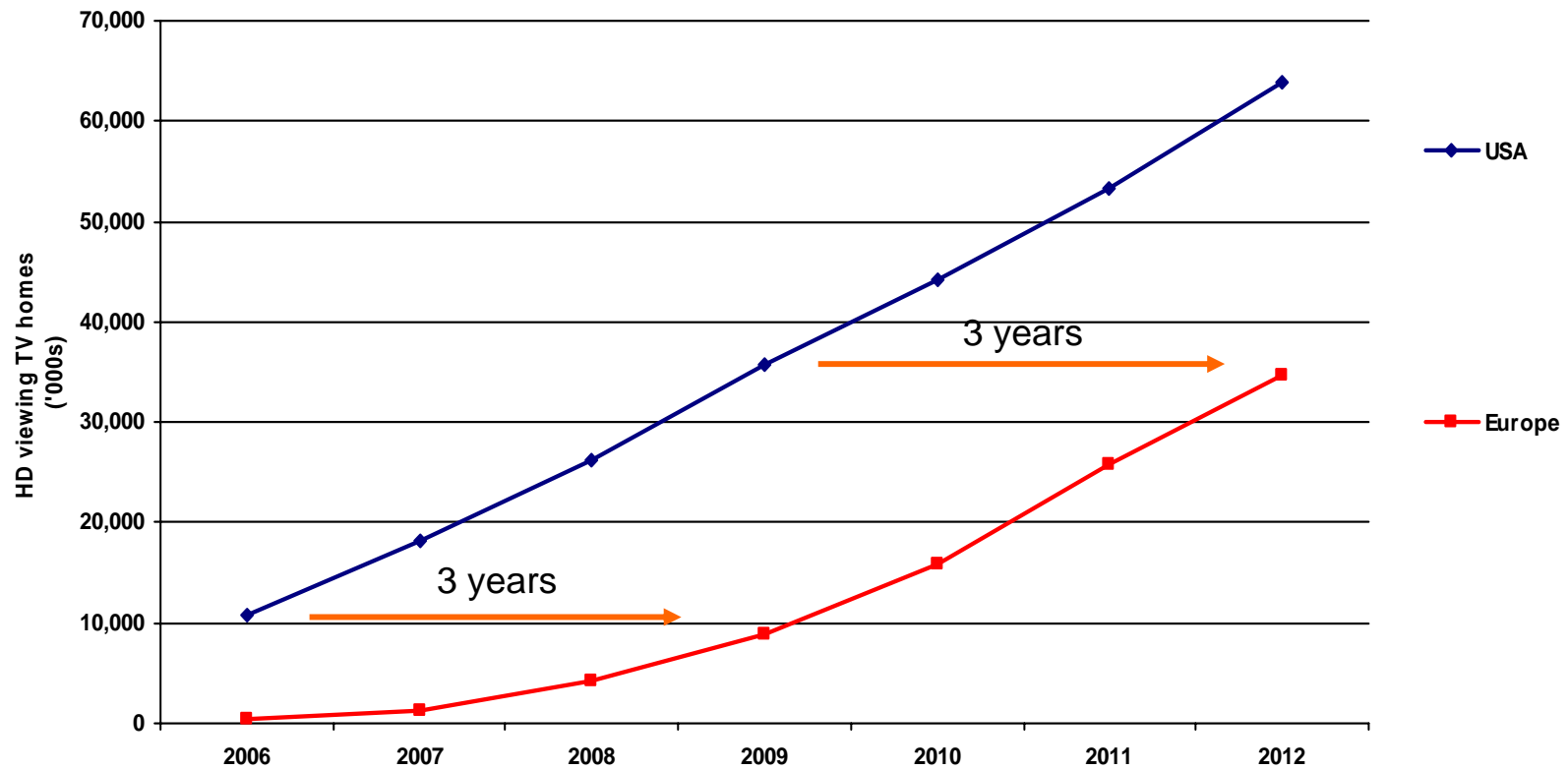
Source: Ofcom

Note: Based on 400 respondents; 'Don't knows' are excluded from the chart and table.

# HD Viewing Europe vs. USA



## HD Viewing TV homes Europe vs. USA



Source:  
Europe:

Screen Digest, July 2008  
AT, BE, DE, ES, FR, GB, IE, NL, EST, H, RO, SK, SLO, CZ, DEN, FIN, SWE, CH, IT, PL, PT

- 55 HD channels
  - ASTRA to distribute 100 HD channels by YE 2010
- 1.2 mio HD viewers on ASTRA
  - expected to grow 10fold by YE 2012
- 48 mio HD ready screens installed in European markets
  - almost 1/3<sup>rd</sup> of all TV homes
  - penetration set to grow to 85% by YE 2012
- HD Success Story is driven by national Key Broadcasters
- HD markets will emerge individually



**Thank you for your Attention**

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