ENDERS | ANALYSIS

European digital TV trends and challenges

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The 2008 European Television Symposium ‘Cross-platform television’
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South African Advertising Research Foundation

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European digital analogue split

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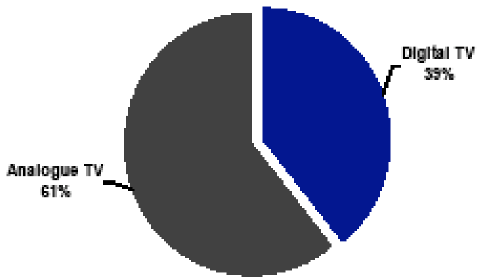
By the end of 2007, almost two fifths of European homes had digital reception on at least one TV set according to the latest SES-Astra survey of 226 million homes in 32 countries

European digital TV penetration end of 2007 (%)



[Source: SES Astra, Enders Analysis]

European DTV growth trends

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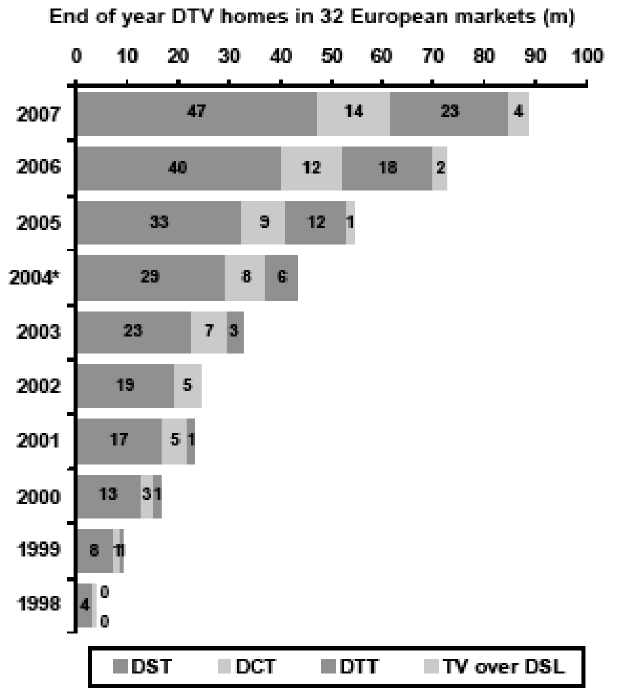
- DTV penetration has increased rapidly over the last five years
- Up to now, DST has been the main driver of digital growth, accounting for more than 50% of DTV homes
- Most early DST growth came from pay-TV services that went digital in the mid to late nineties. More recently there has been strong growth in free-to-air (FTA) DST reception
- After a long slow start, DTT penetration is now building very rapidly, spurred on by government imposed switchover dates and with a heavy emphasis on FTA services
- Slower digital cable TV (DCT) growth reflects the semi-public utility model of cable in the German-speaking, Benelux and Nordic countries, where cable is most heavily deployed



[Source: SES Astra, Enders Analysis] **2004 onwards includes Bosnia and Serbia.

European analogue/digital split by platform

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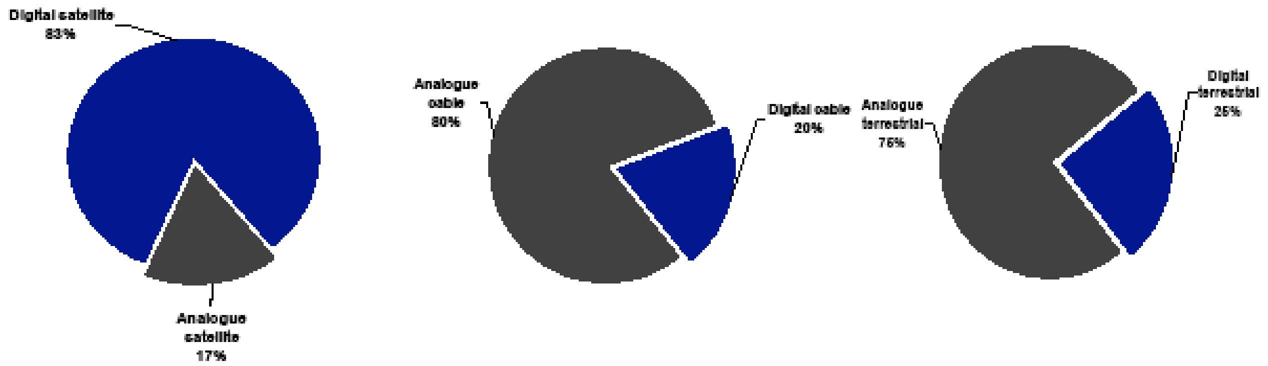
End of 2007 split of digital versus satellite reception (%)

Satellite – 57 million HH | **Cable – 72 million HH** | **Terrestrial – 93 million HH**



[Source: SES Astra, Enders Analysis]

European DTV penetration

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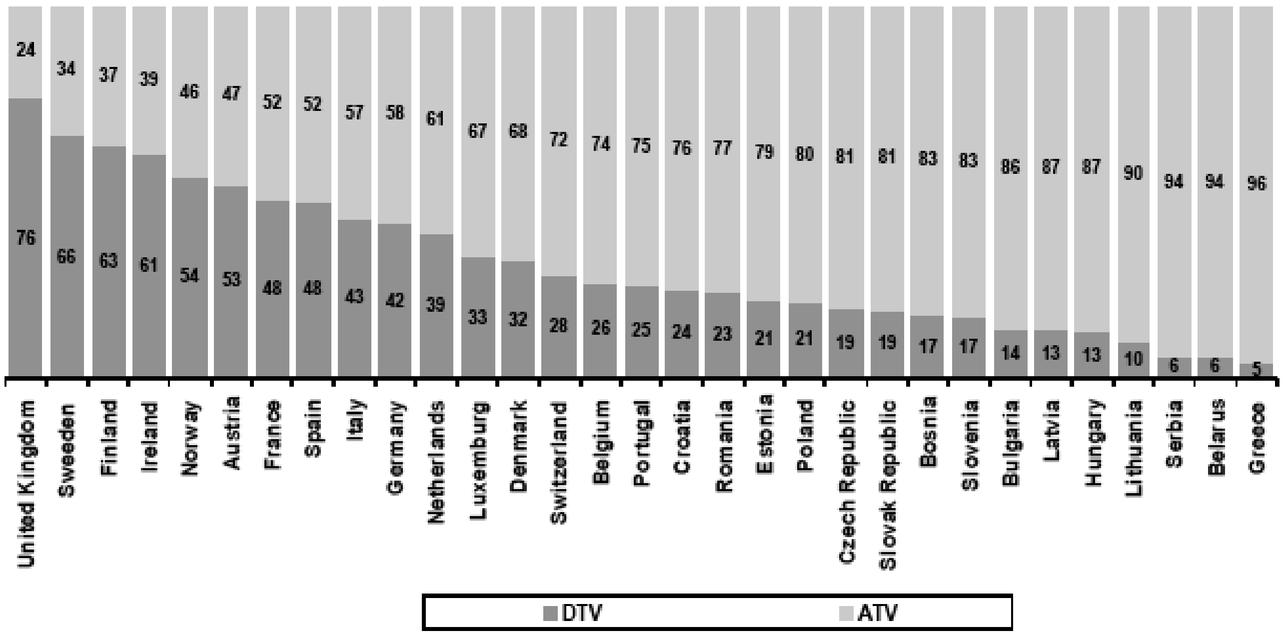
End of 2007 DTV penetration of TV homes (%)



[Source: SES Astra]. Note: SES Astra figures may differ from national sources; e.g. BARB end of 2007 figures put total UK DTV penetration at 82%

European national terrestrial DSO plans

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- DTT transmissions have commenced in almost all European countries
- The majority have set target DSO dates of around 2010-2012

Country	DTT launch	DSO	Business model
Austria	2006	2010	FTA
Belarus	2004		
Belgium	2002	2012	FTA
Bulgaria		2012	
Croatia	2007	2010	FTA
Czech Republic	2005	2010	FTA
Denmark	2006	2009	FTA
Estonia	2006	2010	FTA/PayTV
Finland	2001	2007	FTA/PayTV
France	2005	2011	FTA/PayTV
Germany	2002	2009	FTA
Greece	2006	2012	FTA
Hungary	2008	2012	
Ireland	2008	2012	FTA
Italy	2003	2012	FTA/PayTV

Country	DTT launch	DSO	Business model
Lithuania	2006	2012	FTA/PayTV
Luxembourg	2006	2006	FTA
Malta	2005	2010	
Netherlands	2003	2007	FTA/PayTV
Norway	2007	2009	FTA/PayTV
Poland	2007	2014	FTA
Portugal	2008	2012	FTA
Slovakia	2008	2012	
Slovenia	2007	2010	FTA
Spain	2000	2010	FTA
Sweden	1999	2007	FTA/PayTV
Switzerland	2001	2008	FTA
Ukraine	2006	2015	
UK	1998	2012	FTA/PayTV

[Source: DVB, Enders Analysis]

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DTT growth in larger European terrestrial markets

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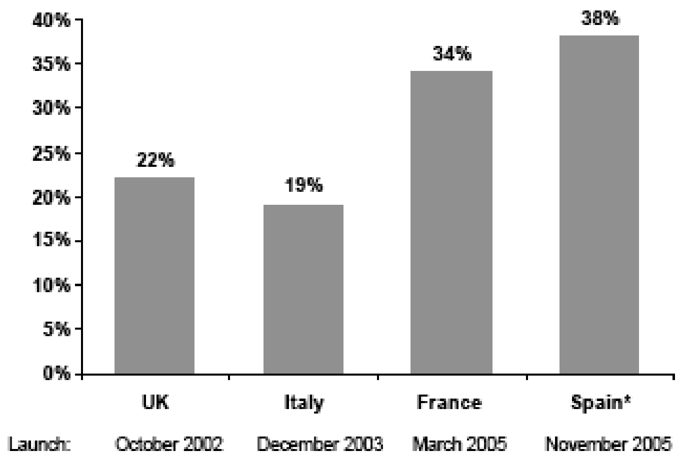
DTT household reception three years after the launch of free DTT broadcasts (%)



* Forecast

[Source : Enders Analysis]

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