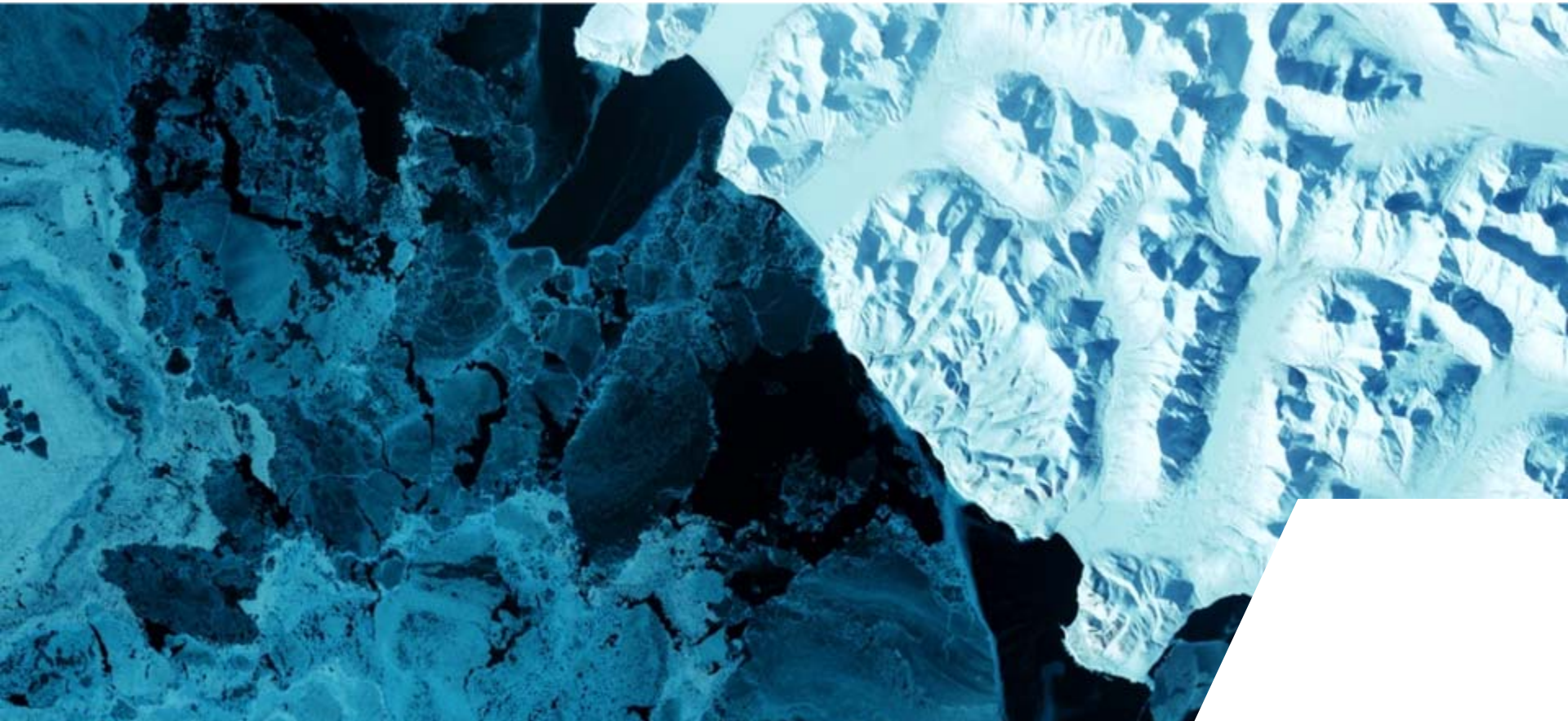


# Making HD Happen

SES ASTRA presentation for “Ukraine on Air”, October 23, 2009, Kiev



Markus Fritz, VP & General Manager, Marketing, SES ASTRA

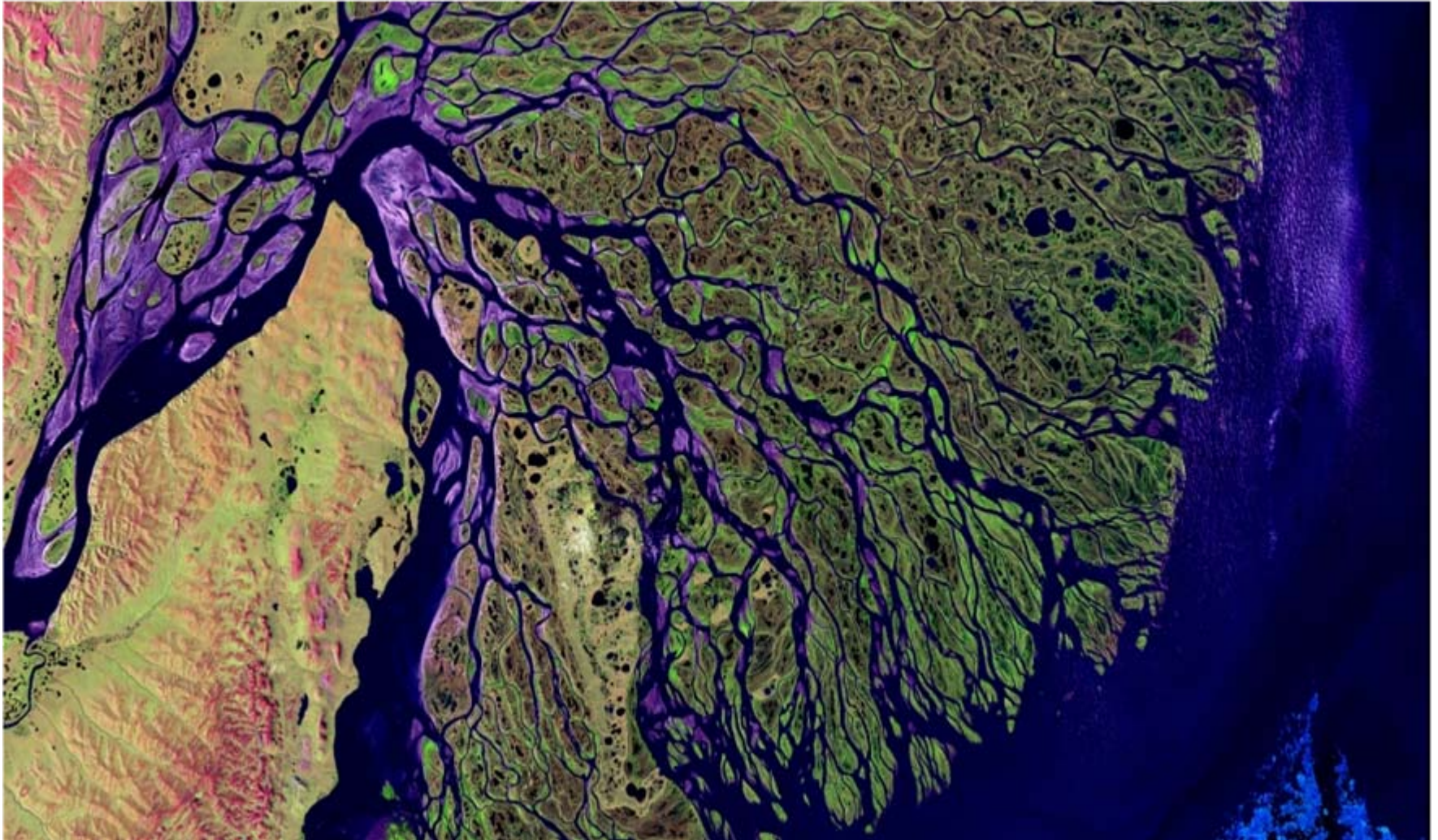
## Current situation

- HD is becoming a mass market
- HD screens are now in almost every other TV home in Europe
- Nearly 100 million HD ready TV sets sold
- 92% of flat screens sold are HD ready
- The average price of HD ready LCD TVs declined to €362

## Forecast for 2013

- 2/3 of all TV viewers to be HD ready (equipped with HD screen)
- 49 million HD viewers in Europe, of which 21 million on satellite (43%)
- 30% of all future satellite viewers will be HD viewers

# HD ready screen sales (Sept 2005 – June 2009)



# Sales of HD ready screens in Europe



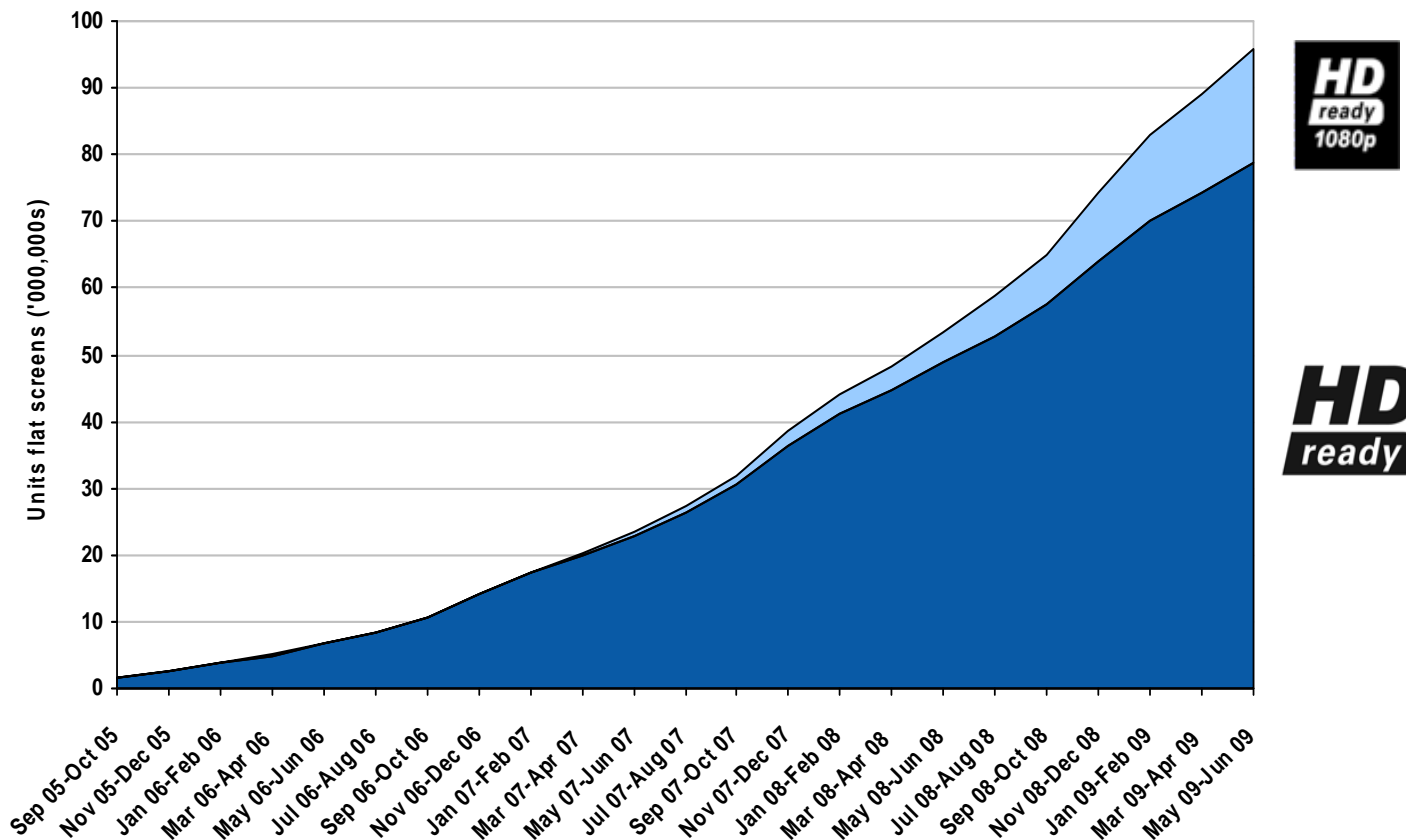
Introduction

HD screen sales

HD channels

HD viewers

Almost 100 million HD ready TV sets sold by June 2009  
 This corresponds to nearly 50% of all European TV homes



Source: GfK Retail and Technology, July 2009  
 Type of Screens: LCD, Plasma, Rear projection  
 Countries: AT, BE, CZ, DK, FL, FR, DE, GR, HU, IT, NL, PL, PT, SK, ES, SE, CH, UK

# Sales of HD ready screens in Ukraine



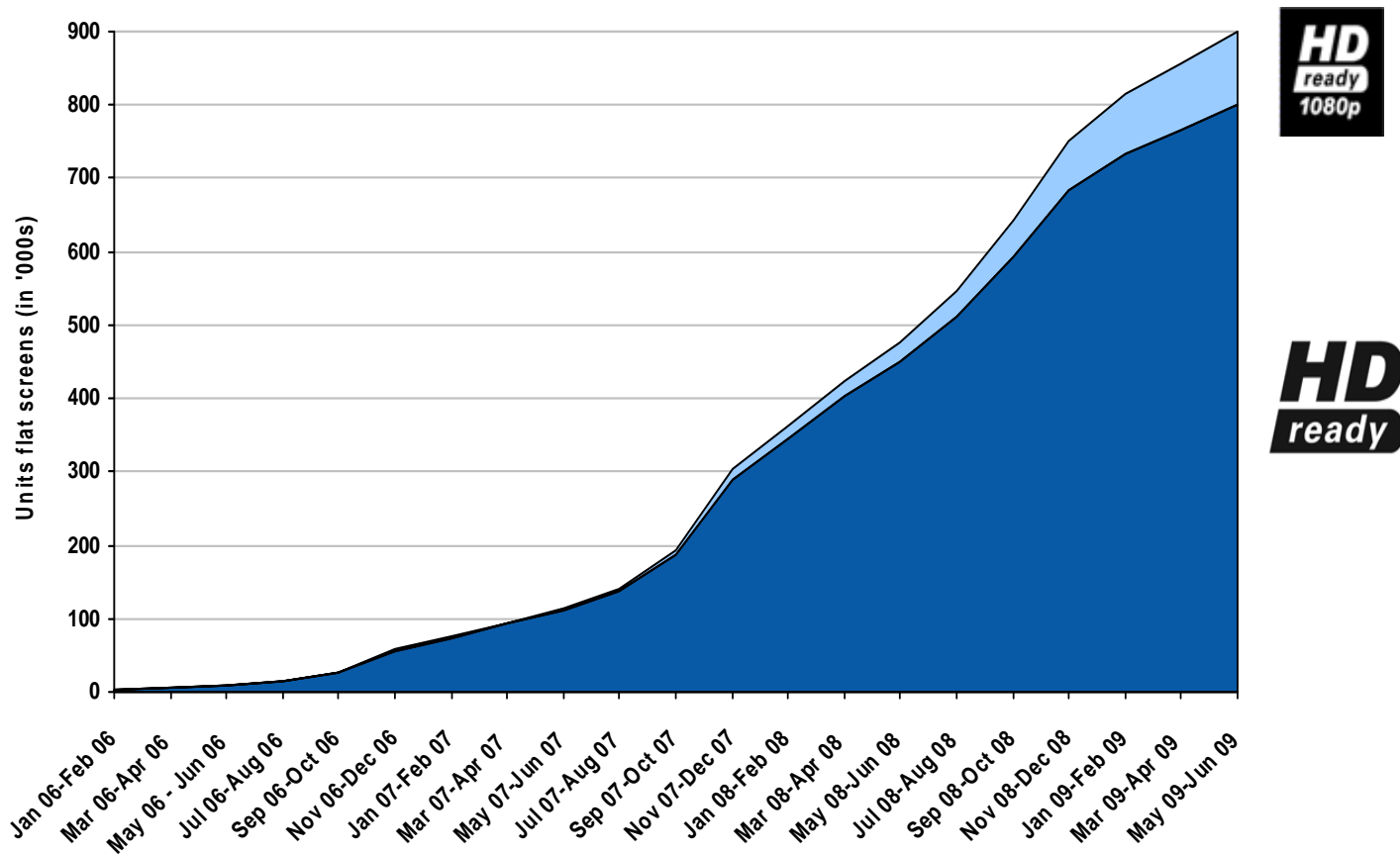
Introduction

HD screen sales

HD channels

HD viewers

## 900,000 HD ready TV sets sold until June 2009



Source: GfK Retail and Technology, July 2009  
Type of Screens: LCD, Plasma, Rear projection

# Sales of HD ready screens in Ukraine



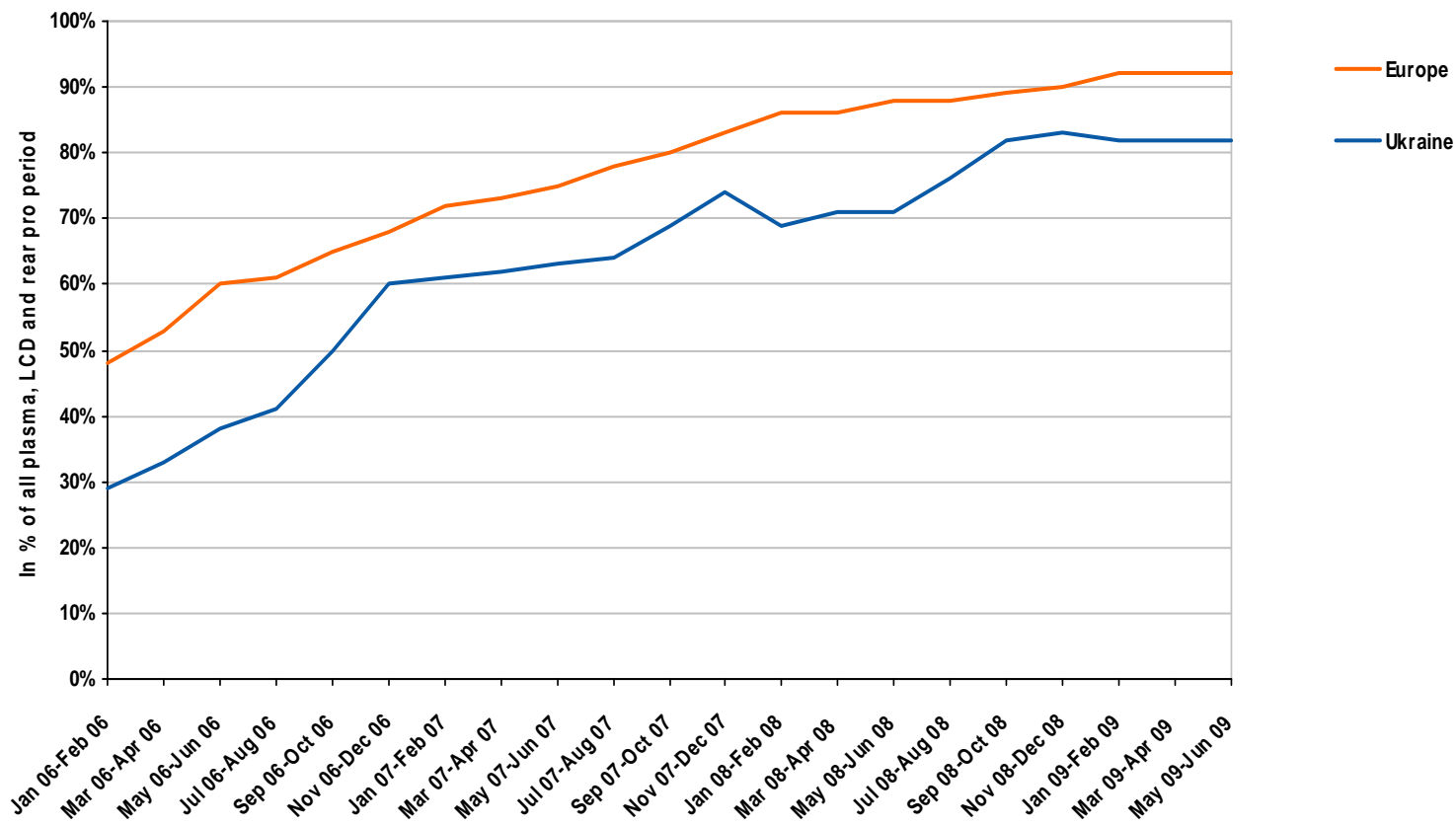
Introduction

HD screen sales

HD channels

HD viewers

82% of all flat screens sold to date are HD ready



Source: GfK Retail and Technology, July 2009  
Type of Screens: LCD, Plasma, Rear projection

# Sales of HD ready screens in Ukraine



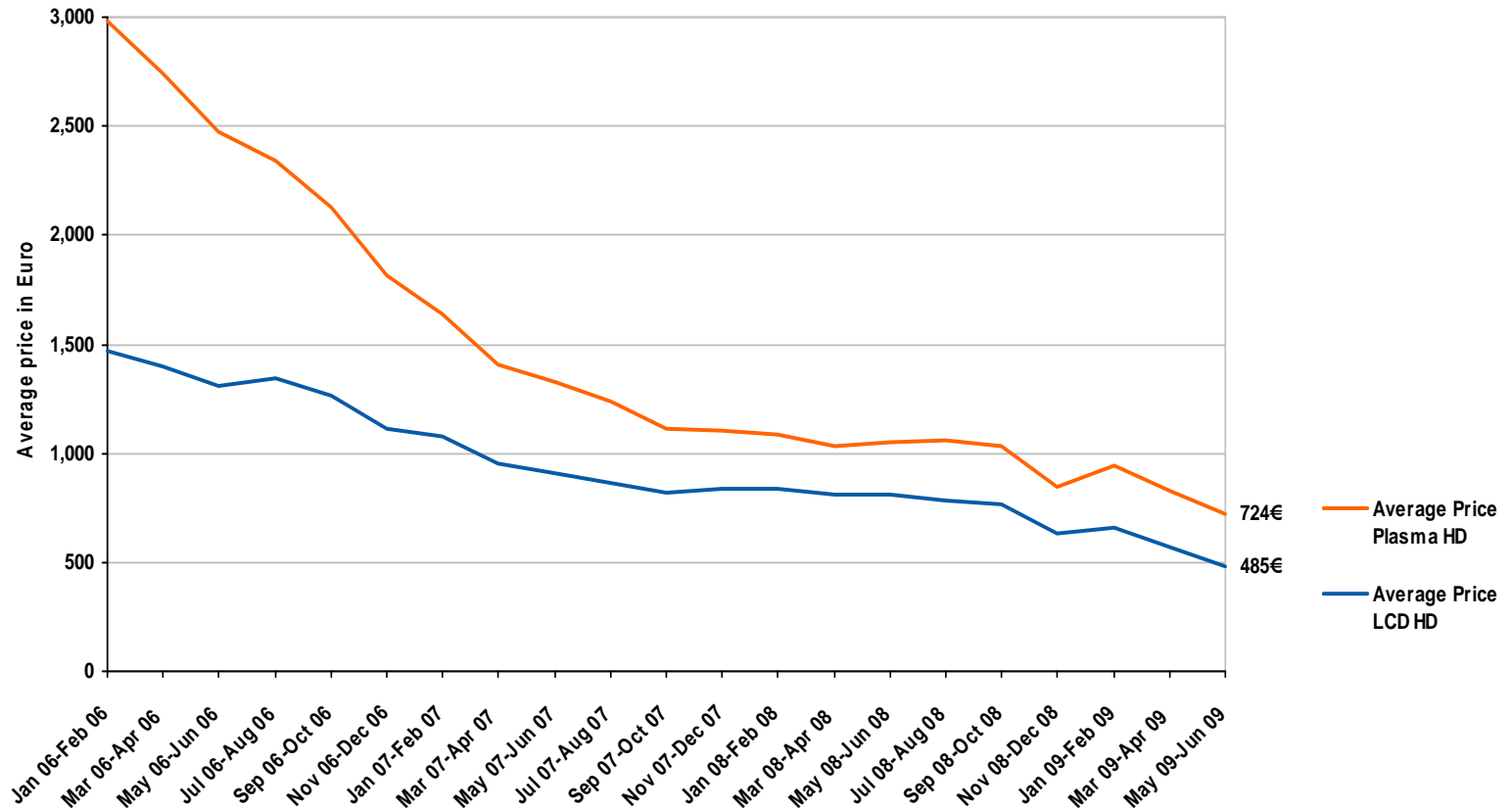
Introduction

HD screen sales

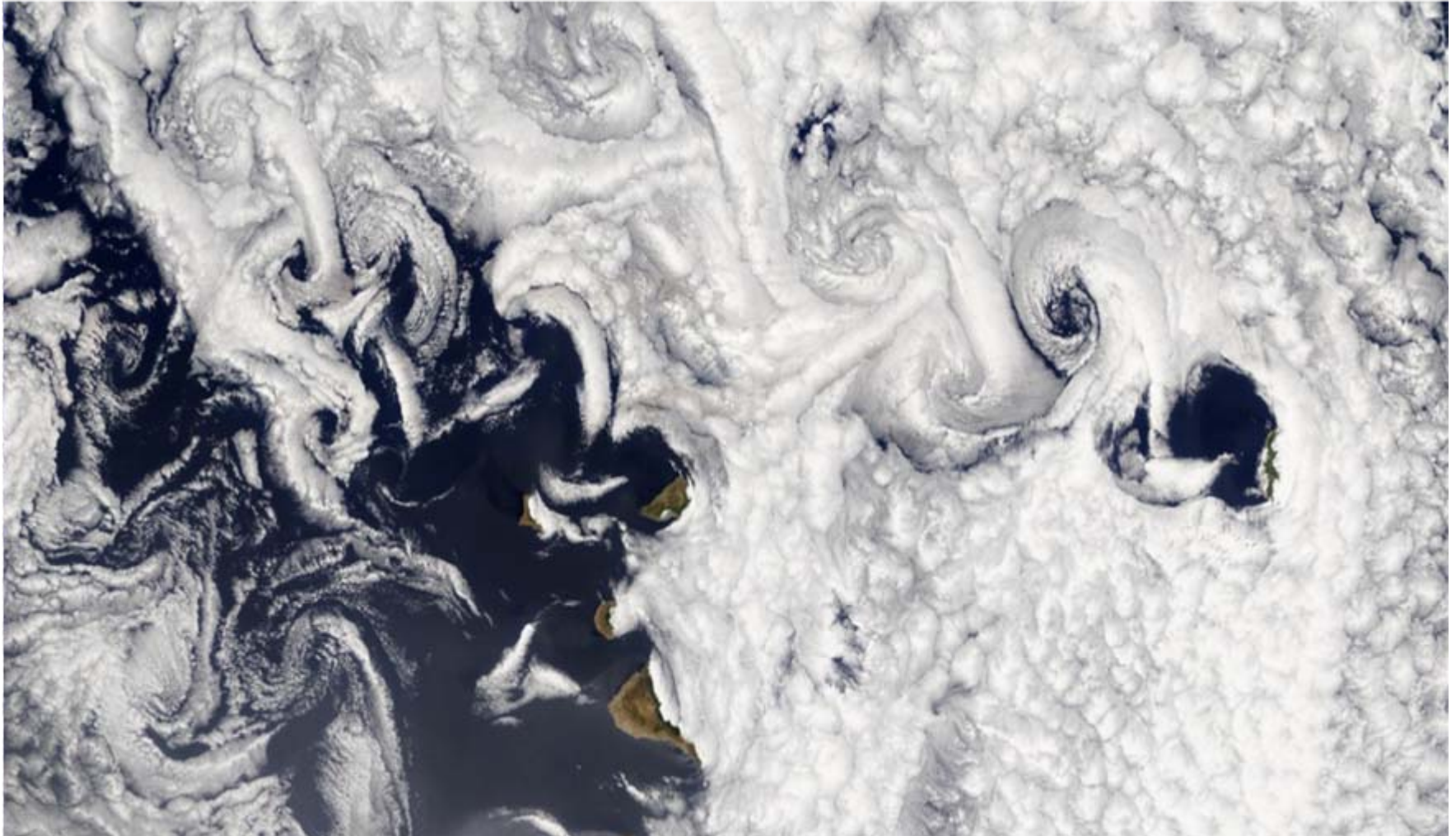
HD channels

HD viewers

The average price of LCD HD screens declined to 485€



Source: GfK Retail and Technology, July 2009  
Type of Screens: LCD, Plasma



# HD channel growth on ASTRA and SIRIUS



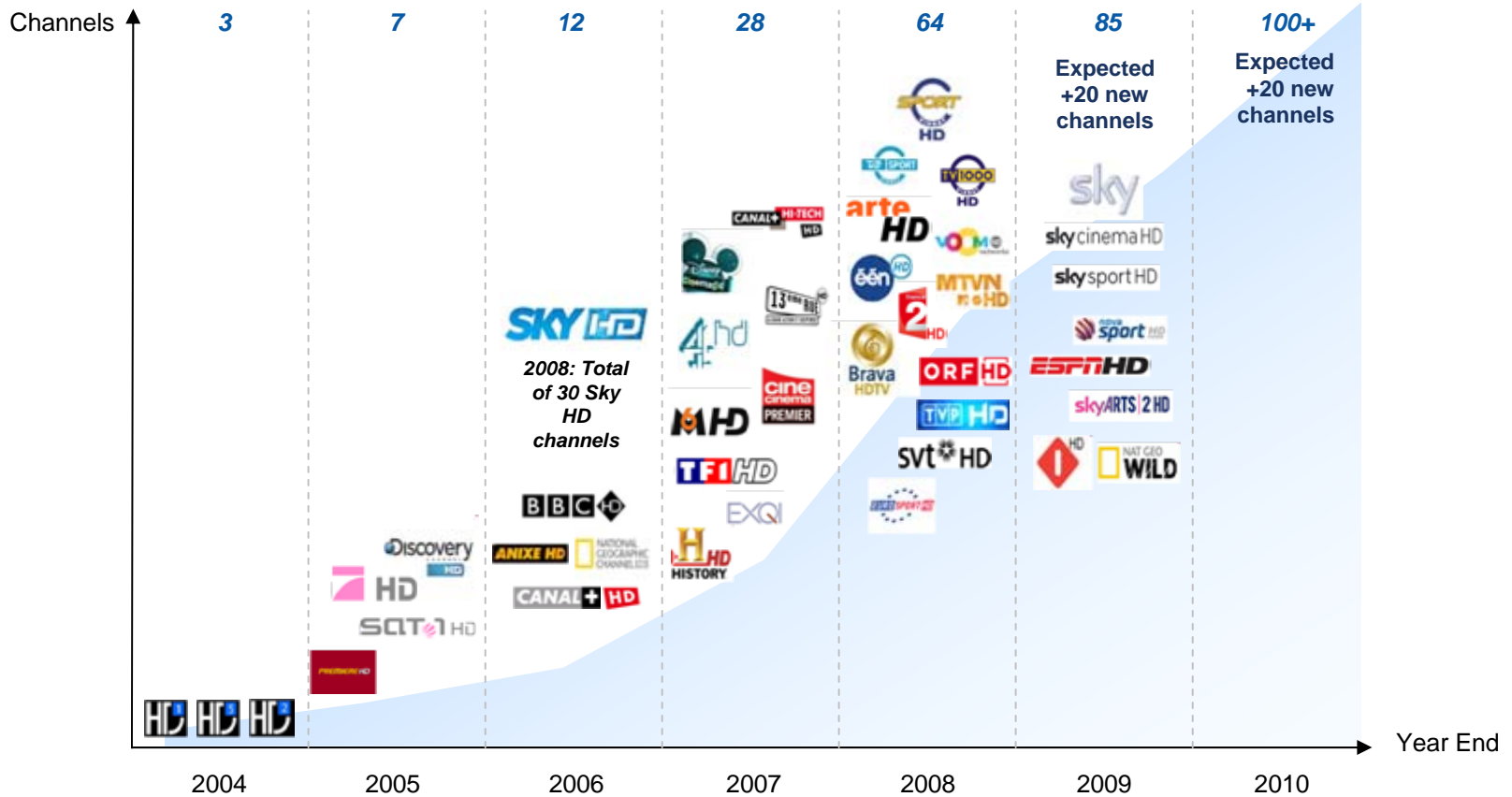
Introduction

HD screen sales

HD channels

HD viewers

## ASTRA HD channel development and forecast 2004 - 2010



# HD growth pillars – business models

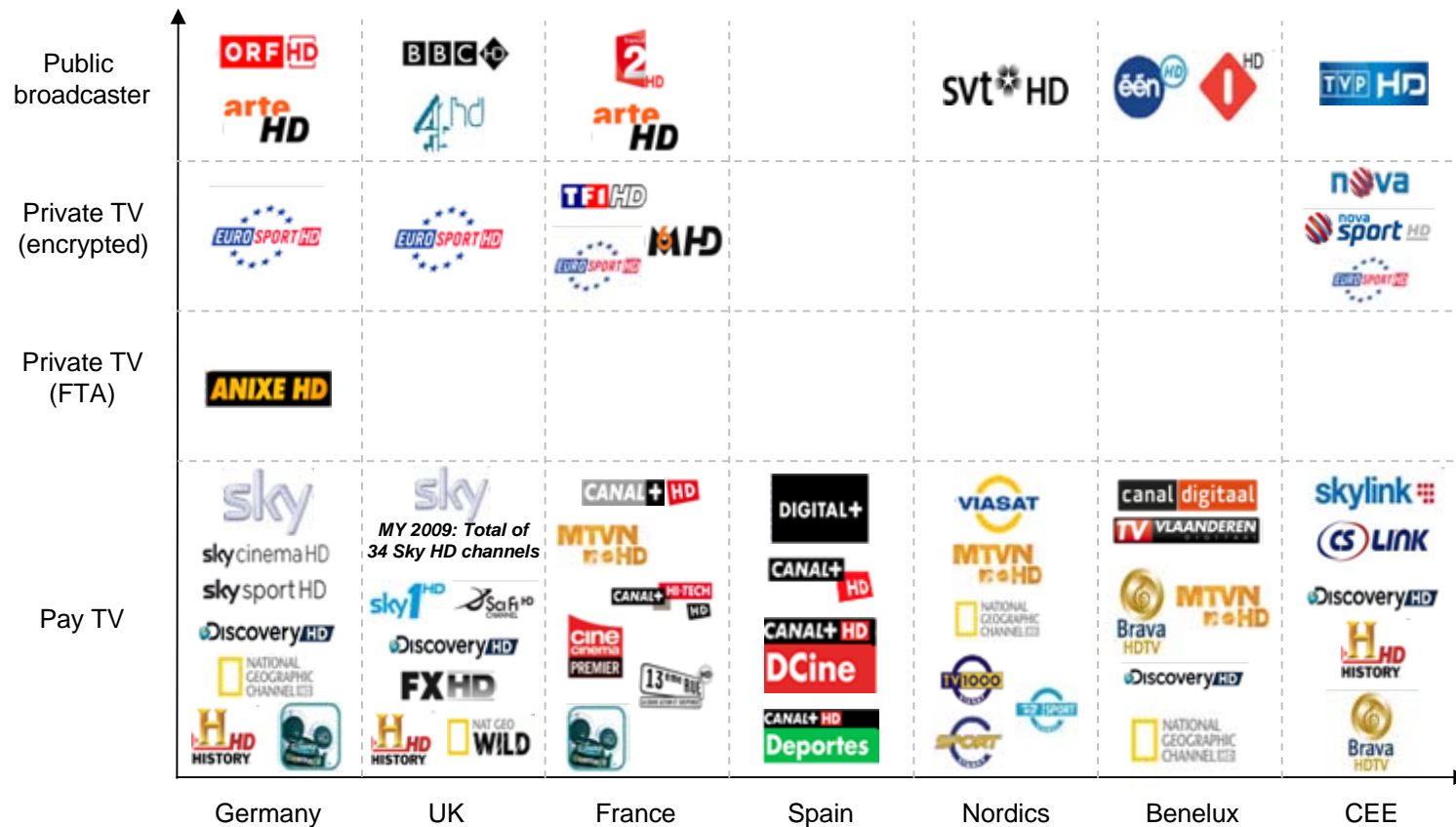
Introduction

HD screen sales

HD channels

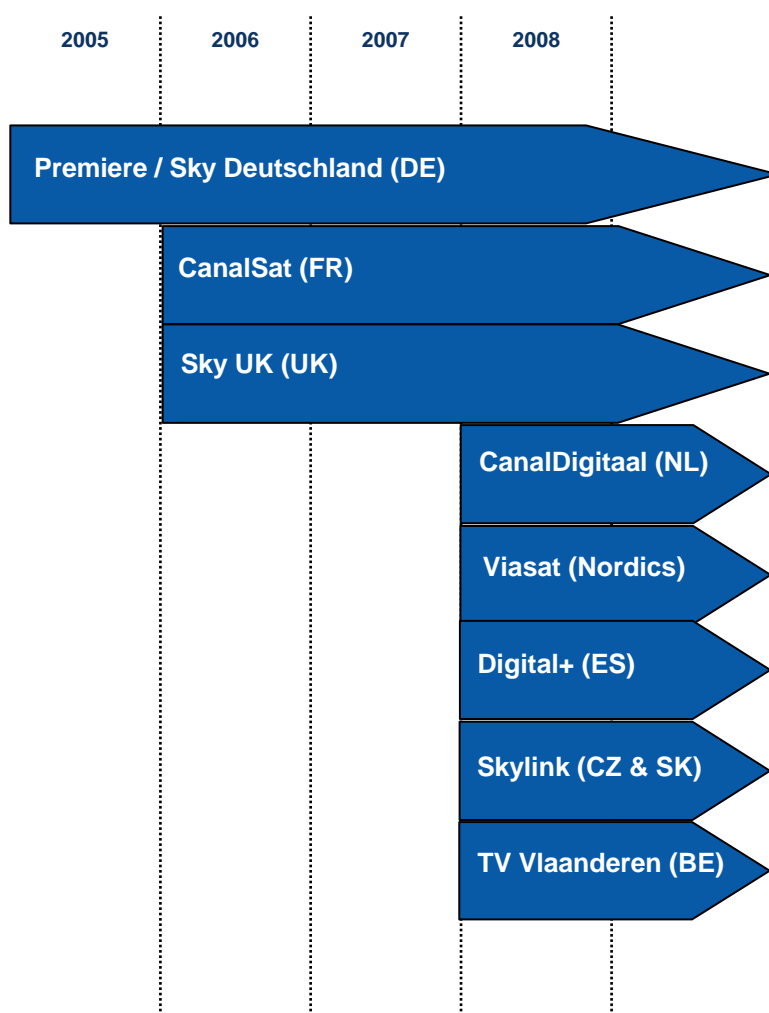
HD viewers

HD on ASTRA tends to appear first in premium pay TV offers, followed by public and private FTA. ASTRA core HD markets are UK, France and Germany.

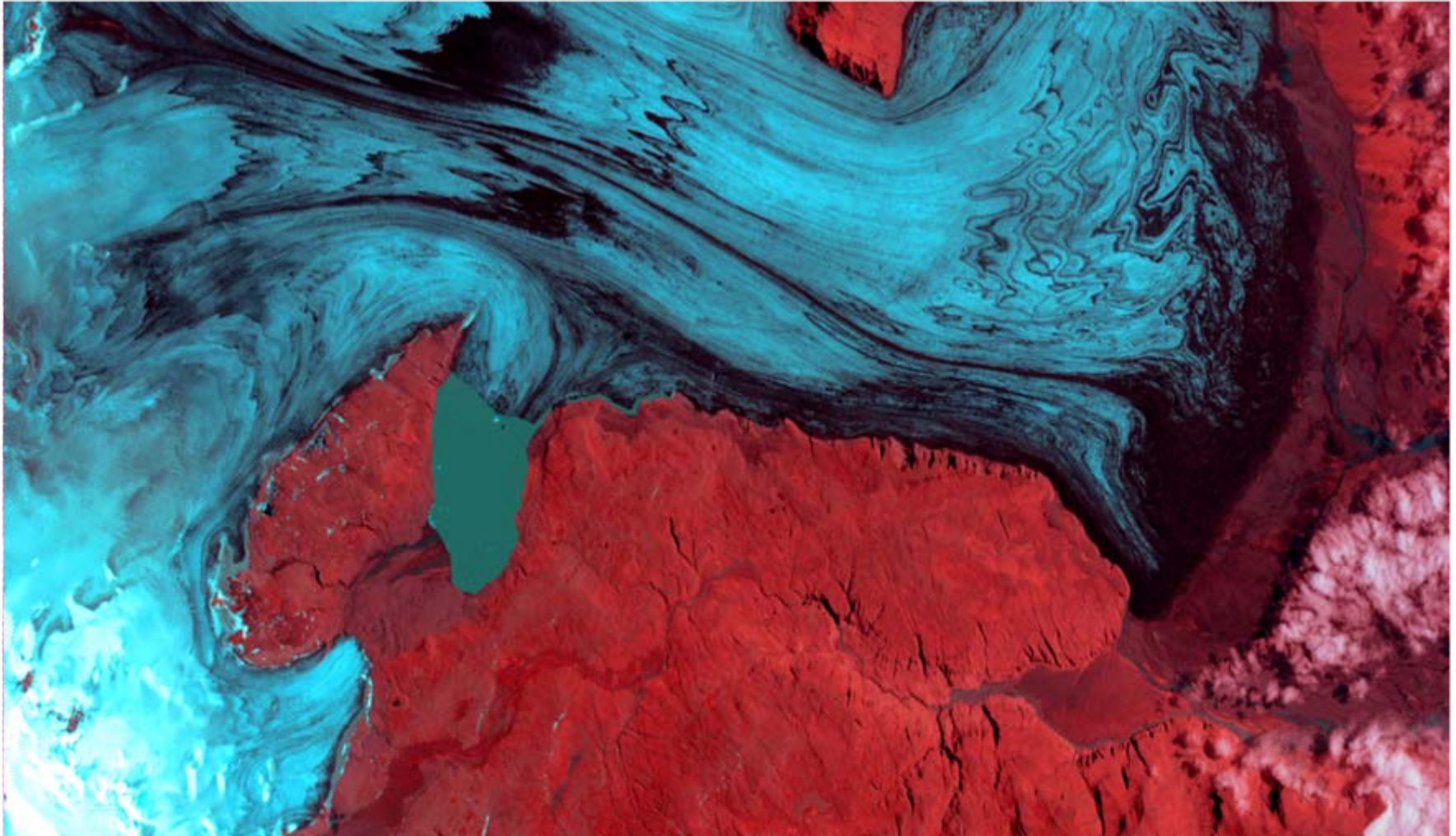


# Rollout of HD offers by DTH pay TV platforms

Introduction    HD screen sales    HD channels    HD viewers



# HD viewer growth prospects in ASTRA markets



# HD homes on ASTRA and Sirius



Introduction

HD screen sales

HD channels

HD viewers

There are some 3.1 million HD homes on ASTRA and SIRIUS (mid-year 2009)

<b>UK:</b>	<b>1.58 million</b>
• BSkyB:	1.313 million
• Freesat:	270,000 HD STB's sold
<b>Germany:</b>	<b>0.63 million</b>
• Sky Deutschland:	180,000 HD subscribers
• Incl. FTA:	630,000 HD STBs sold
<b>France:</b>	<b>0.42 million</b>
• CanalSat:	220,000 HD subscribers
• TNTSAT:	200,000 HD STBs sold
<b>Other markets:</b>	<b>0.49 million</b>
• Austria	95,000 HD STBs sold
• Benelux	20,000 HD subscribers
• Czech Republic	5,000 HD subscribers
• Nordic Countries	70,000 HD subscribers
• Poland	200,000 FTA HD viewers
• Spain	100,000 HD subscribers



Source: Screen Digest TV Intelligence Database, July 2009; Dataxis Quarterly Statistics, 2Q 2009; Company websites, 2Q 2009; Industry estimates, July 2009

# Consumer readiness – HD viewers by reception mode



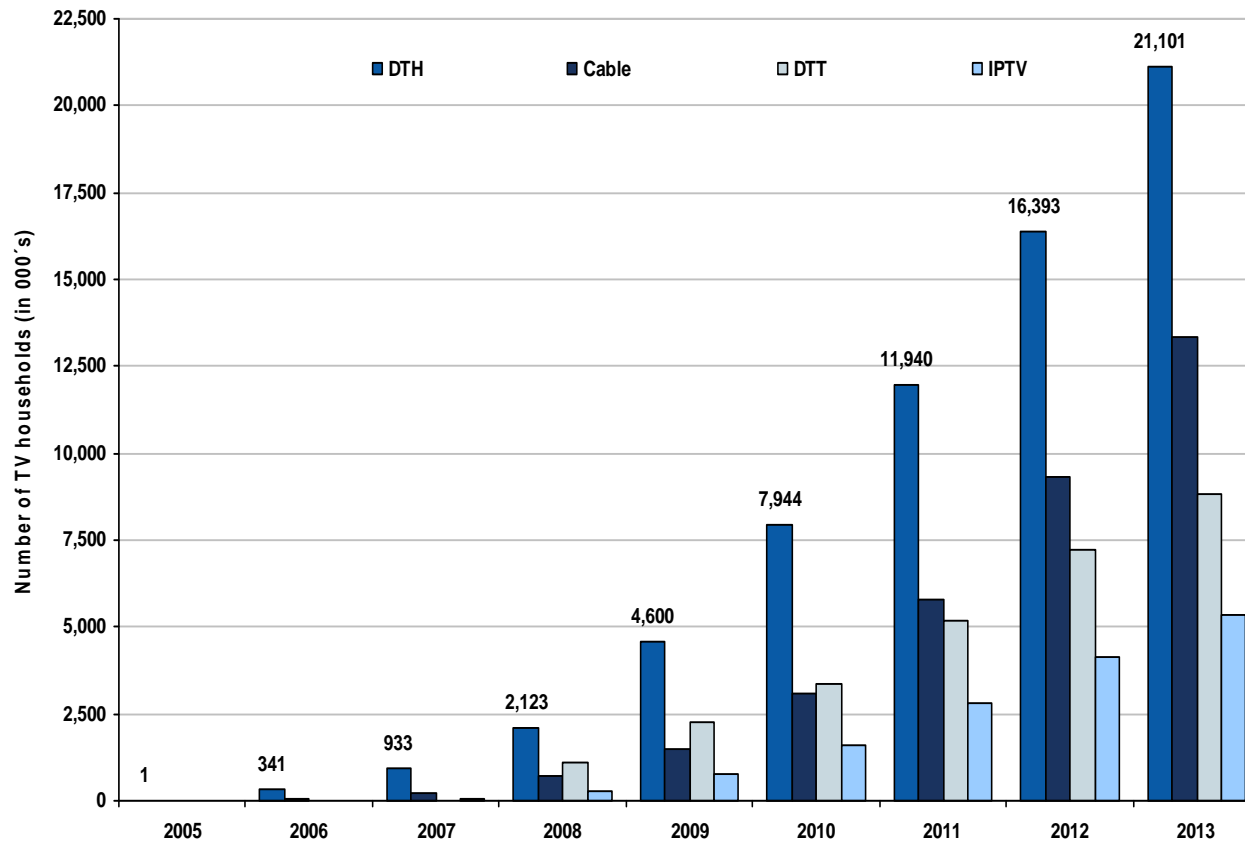
Introduction

HD screen sales

HD channels

HD viewers

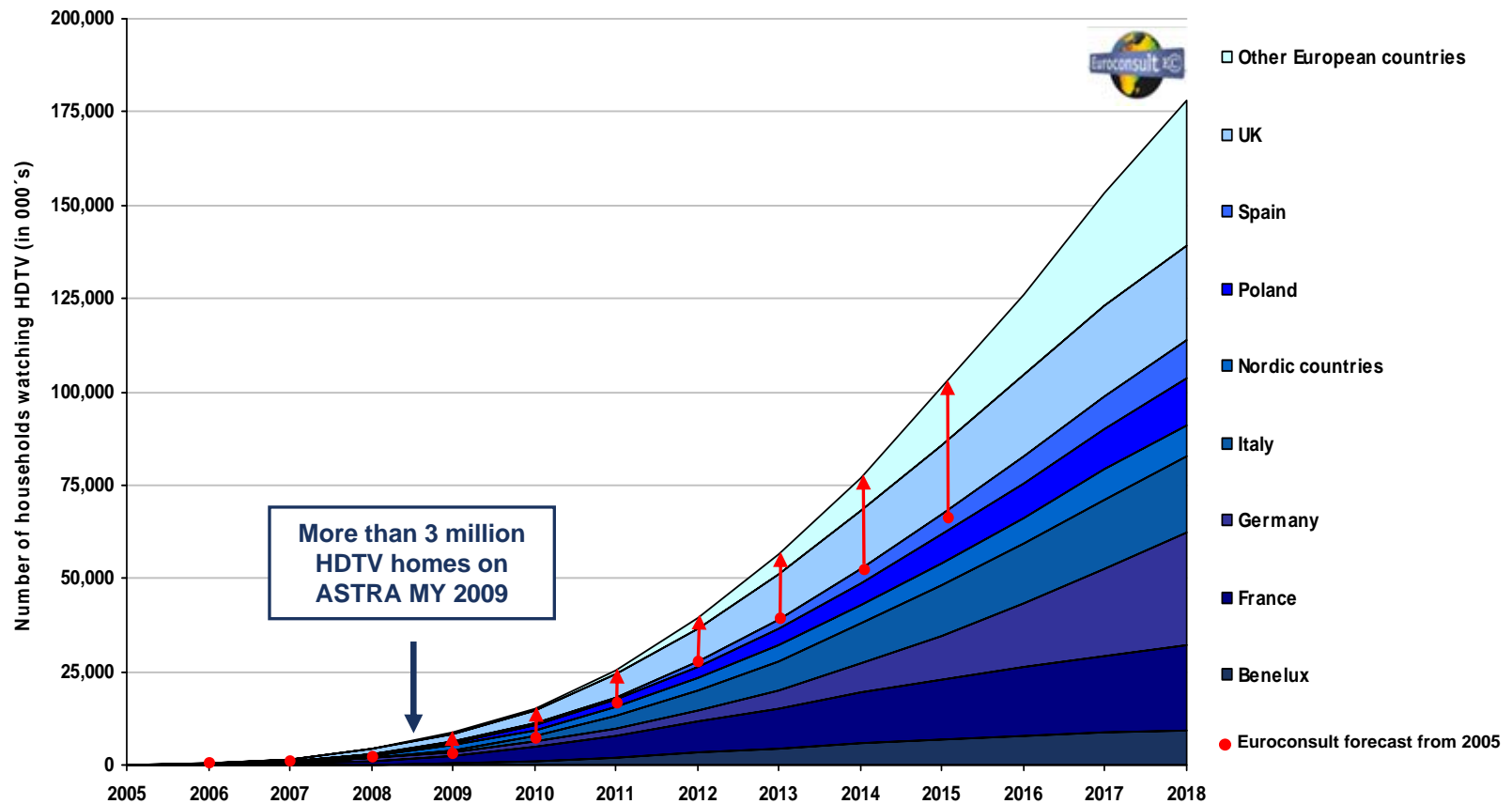
Almost 50 million HD homes in Europe by 2013 - satellite to be the largest distribution platform



Source: Screen Digest TV Intelligence Database, July 2009

# Consumer readiness – HD viewer forecast by country

## HD viewing is becoming mass market in Europe



Source: Euroconsult report on HDTV produced in partnership with NPA Conseil in 2009; Figures relate to all reception modes

**Thank you for your attention!**

**Markus Fritz**

Vice President & General Manager, Marketing, SES ASTRA

Tel.: (+352) 710 725 338

Fax: (+352) 710 725 324

Email: [markus.fritz@ses-astra.com](mailto:markus.fritz@ses-astra.com)