

Audience of the Eutelsat-Nilesat 7/8° West video neighbourhood breaks barrier of 50 million homes in Middle East and North Africa

Eutelsat announces headline results of its 2014 TV Observatory in the Middle East and North Africa:

- **Satellite reception continues to grow**
 - **92% of TV homes equipped for satellite in 2013 from 67% in 2010**
- **Eutelsat-Nilesat 7/8° West neighbourhood confirmed as the first choice for multi-channel viewing, with an audience of 51.5 million homes**
- **HD gaining traction: one third of TV homes now equipped**

Dubai, Paris, 11 March 2014 – Eutelsat Communications (NYSE Euronext Paris: ETL) today unveiled at Cabsat Dubai the results of its new survey on TV reception modes and trends across the Middle East and North Africa.

Michel de Rosen, Eutelsat Chairman and CEO, commented on the figures: *“Our new survey confirms the exceptional dynamics of the video market in the Middle East and North Africa and the key role played by satellites that now reach into more than nine out of ten homes in the region. This result reflects longstanding partnerships between Eutelsat, GulfSat, Nilesat, Noorsat, Viewsat and anchor media groups, including Al Jazeera, MBC and OSN that are experiencing strong commercial success and are well placed for further expansion in the region.*

The survey also confirms the leadership of the Eutelsat-Nilesat 7/8 West neighbourhood whose audience of more than 50 million homes can receive an unequalled line-up of 1,050 Arabic and international channels. Going forward, we believe that the move to higher quality afforded by HD and, for the future, 4K will further consolidate satellite as a core infrastructure in the region.”

Satellite: the preferred digital infrastructure across Middle East and North Africa

Overall, the MENA satellite TV universe continues to expand and satellite is the first choice for multi-channel viewing. Out of a population base of 77.1 million TV homes across 15 countries, more than nine out of ten (92%) favour satellite reception for pay-tv or free-to-air viewing. In 2010, satellite reception accounted for 67% of TV homes in the region, showing like for like¹ increased penetration of 25 percentage points over the last three years.

Over the same period, the number of homes receiving analogue terrestrial TV slumped from 18.2 million in 2010 to 4.1 million in 2013, confirming satellite as the most popular route to digital switchover. IPTV has gained some ground in the Gulf with 0.7 million households exclusively IPTV equipped.

¹ Excluding Iraq, Kuwait, Libya, Oman and Yemen which were added to the 2013 edition but not surveyed in 2010.

Free-to-air still driving growth

Free-to-air remains by far the most widespread reception mode across the region, accounting for 94% of satellite homes in 2013, up from 90% in 2010.

Eutelsat – Nilesat 7/8 ° West neighbourhood: first choice for multi-channel viewing

The Eutelsat-Nilesat 7/8° West neighbourhood has further anchored its leading position, with an audience of 51.5 million homes. On a like for like basis, 63% growth was recorded in the 10 countries included in the 2010 and 2013 studies. Viewer attraction to the 7/8° West neighbourhood is driven by a strong channel line-up which grew by 50% over the period to 1,050 Arabic and International channels. Excluding Iran, where Eutelsat's HOT BIRD satellites are the primary video neighbourhood, the Eutelsat-Nilesat 7/8° West position enjoys an average penetration rate of over 90% of satellite homes in MENA.

HDTV: 29% of TV homes now equipped in Middle East and North Africa

The number of homes equipped with an HD Ready or Full HD display has crossed a threshold of 20 million, accounting for 29% of TV homes in the region. Penetration of HD consumer equipment in Saudi Arabia, UAE and Jordan is above 50%. Of the 41.3 million homes not equipped for HDTV, 50% intend to buy an HD display within the next 12 months

The objective of Eutelsat's observatory is to monitor the evolution of consumer TV reception modes and trends² including analysis of reception platforms (satellite, cable, DTT, IPTV, analogue terrestrial), breakdown between free-to-air and pay-tv, breakdown by orbital position and assessment of HD consumer equipment take-up.

Conducted between November 2013 and January 2014, the survey in MENA was carried out in 14 countries: Algeria, Egypt, Iran, Iraq, Jordan, Kuwait, Lebanon, Libya, Morocco, Oman, Saudi Arabia, Tunisia, UAE, Yemen. 17,000 face-to-face interviews were conducted using a single questionnaire shared by two leading research institutes, TNS and GfK. Figures for Syria were carried over from the 2010 edition.

Where to meet Eutelsat at Cabsat Dubai, Dubai World Trade Centre, 11-13 March:

Eutelsat stand: Hall 1 – Stand E1-10

About Eutelsat Communications

Established in 1977, Eutelsat Communications (Euronext Paris: ETL, ISIN code: FR0010221234) is one of the world's leading and most experienced operators of communications satellites. The company provides capacity on 34 satellites to clients that include broadcasters and broadcasting associations, pay-tv operators, video, data and Internet service providers, enterprises and government agencies. Eutelsat's satellites provide ubiquitous coverage of Europe, the Middle East, Africa, Asia-Pacific and the Americas, enabling video, data, broadband and government communications to be established irrespective of a user's location. Headquartered in Paris, with offices and teleports around the globe, Eutelsat represents a workforce of 1,000 men and women from 32 countries who are experts in their fields and work with clients to deliver the highest quality of service.

For more about Eutelsat please visit www.eutelsat.com

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² Survey not inclusive of hotels, public administration buildings, hospitality structures, oil rigs & platforms

Annexes:

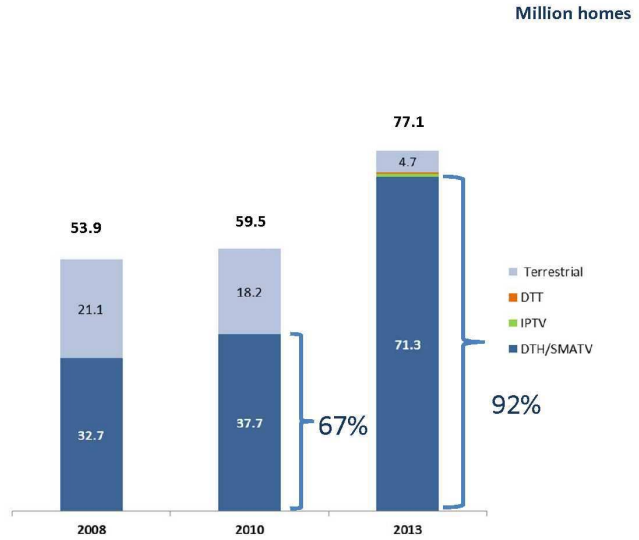
SATELLITE VS OTHER TV RECEPTION MODES

- / **Satellite market share has grown by 25 percentage points** over 3 years, from 67% to 92% in 2013
 - 71.3 million homes receive TV via satellite
 - Excluding Iraq, Kuwait, Libya, Oman and Yemen which were not surveyed in 2010, the number of satellite homes would have grown from 37.7 to 63.2 mil TVHs (+68%)

- / **Satellite is now serving 9 out of 10 TVHs in MENA**

- / **IPTV gains ground in the Gulf**
 - 0.7 mil homes (1% of MENA TVHs)
 - 30% of UAE TVHs are exclusively IPTV equipped

- / **Analog terrestrial is slowly extinguishing**
 - 4.7 million homes (6% of MENA TVHs)
 - Yemen only country above 20%
 - Switch-off deadline for the region in 2015



*Note: 5 countries added to the study in 2013: Iraq, Kuwait, Libya, Oman and Yemen.
In 2010 Iran not surveyed; figures carried from 2008*

EUTELSAT-NILESAT 7/8° WEST

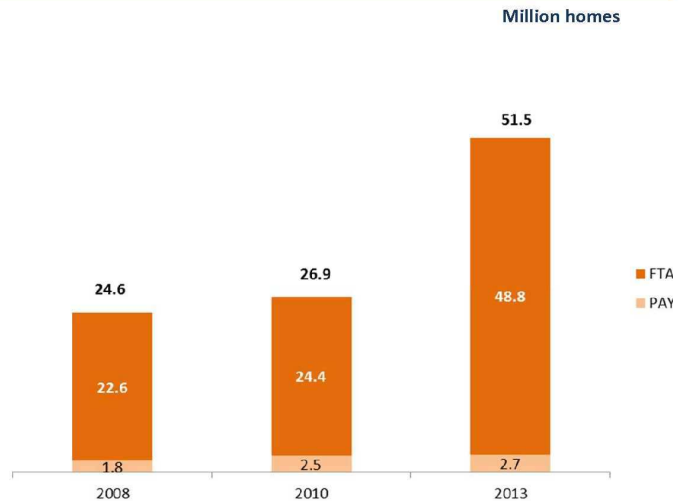
- / **Audience breaks the bar of 50 million homes in 15 MENA countries**

- 51.5 million satellite homes in MENA receive the Eutelsat-Nilesat 7/8W feed

- / **At equal perimeter, growth stands at 63% in the 10 countries included both in 2010 and 2013**

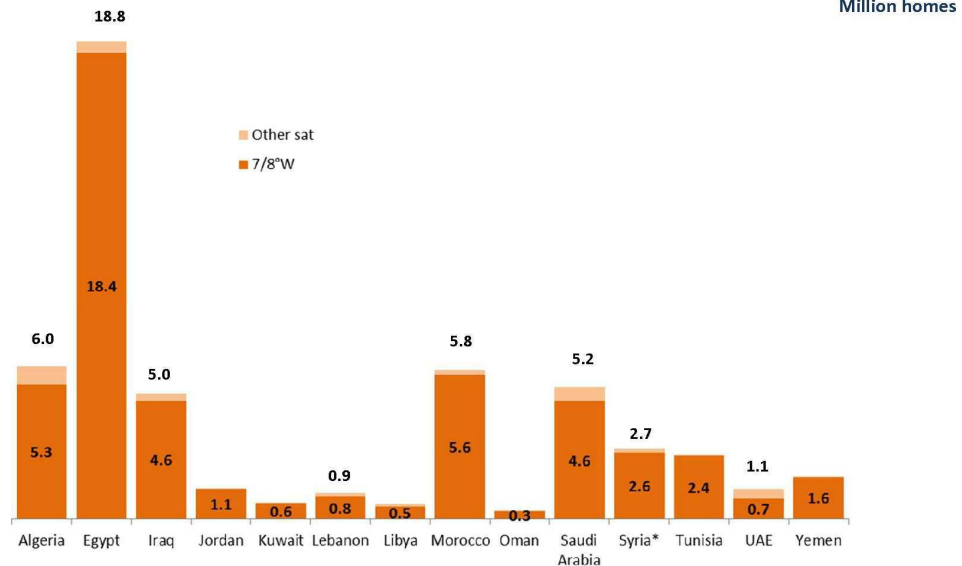
- / **Traction was driven by strong line-up with 50% channel growth to 1050 channels over the same period**

- / **Figures exclude key markets covered by the footprint such as Mauritania, Sudan, Ethiopia (Syria not updated in 2013)**



*Note: Totals inclusive of double equipped households (double dish/LNB, etc.)
Note: Syria not surveyed in 2013*

EUTELSAT –NILESAT 7/8° W SPLIT PER COUNTRY



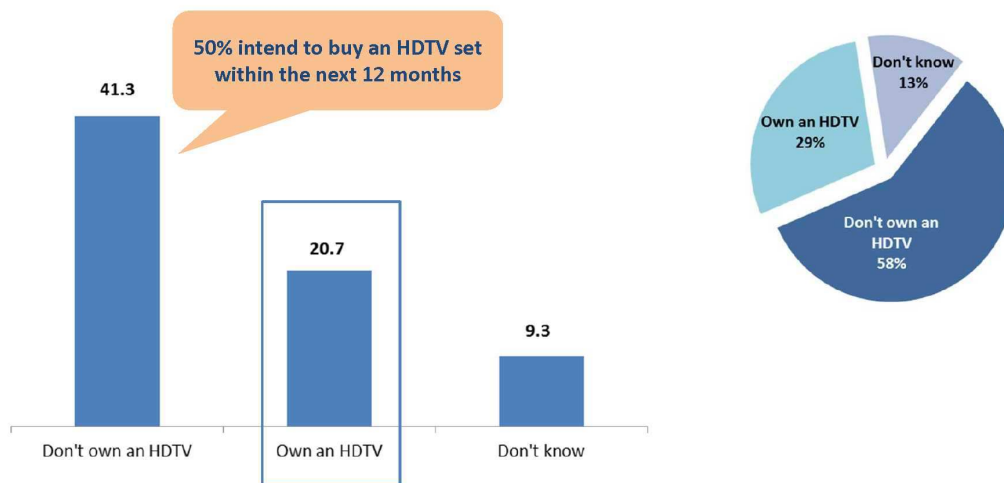
An average penetration rate above 90% in 14 MENA markets

Note: Iran excluded, as HOTBIRD™ 13°E is the primary video neighborhood

HDTV EQUIPMENT RATES

Million homes

Out of the 71.3 mil TV homes in the region, 29% own an HDTV set



Note: 86.5% of TV sets have been checked by interviewers

Note: 14 countries - Syria excluded as not surveyed in 2013