

## Press release

### SATELLITE AND SES CONTINUE ON THEIR GROWTH PATH IN EUROPE

#### **Satellite becomes leading TV infrastructure in Europe / ASTRA serves 142 million TV homes / Leader in digitalisation, leader in HD**

Luxembourg/ London, 27 March 2012. – SES (Euronext Paris and Luxembourg Stock Exchange: SESG) announced today that satellite has become the leading TV infrastructure in Europe, ahead of terrestrial and cable reception. Approximately 84 million European households have satellite (Direct-to-Home, DTH) as their primary TV reception mode, an increase of 22 percent over the last four years. In the same period, terrestrial TV lost nearly 16 million homes, while cable lost over 2 million. IPTV – the TV distribution over telecommunication networks in IP format – has grown from a very low level to some 16 million households.

These are the results of the year-end Satellite Monitor that SES presents annually and that is based on primary research in 35 European and North African countries. The study is based on more than 62,000 interviews, conducted by leading market research institutes under the lead of TNS Infratest, Germany.

The main growth markets for satellite in 2011 were the UK, Germany, Ukraine, Poland and Italy. The main growth drivers are the development of digital reception and High Definition (HD). Satellite today is the leading digital infrastructure, reaching nearly 44 percent of all 186 million digital TV homes in Europe. The digitalisation rate of satellite is 97 percent, compared to 70 percent in terrestrial reception and 48 percent in cable.

The new study that SES presented today in London also shows that ASTRA is extending its position in the European markets. Around 142 million TV households are served by ASTRA, 7 million more than the year before and 25 million more than four years ago. More than half of the European TV homes (57 percent) receive their signals from ASTRA. 73 percent of all European satellite homes are ASTRA households, a total of 62 million. As a leader of digitalisation and High Definition (HD), ASTRA is also the leading HD platform in Europe. Over 23 million of the total 29 million satellite HD households in Europe are ASTRA households. The ASTRA Satellite System transmits 267 HD channels.

Worldwide, SES broadcasts more than 1200 HD channels on its fleet of 50 satellites and reaches 258 million TV households.

“This success confirms our view that satellite reception is the most attractive and future-proof mode for households to watch TV”, said Norbert Hölzle, Senior Vice President Commercial Europe, in London. “The trend in Germany, where satellite overtook cable for the first time in history, is confirmed in the UK as well as in Europe overall, where satellite outgrew the other reception modes. The number and variety of channels, the quality of the broadcast, and the large reach of satellite remain compelling arguments for households to decide for a satellite dish. The factual growth of satellite and ASTRA in the digital world confirms their leading role. It puts us in a strong position to compete with other networks and combine our strengths with DSL and broadband reception. The combination of both in the connected TV will be the best of all possible worlds for the TV viewer.”

## Satellite Monitor Year End 2011 – overview of key results

### Overall TV reception in Europe

(Households in millions)	2011	2010	Change
Cable	69.2	71.0	- 3 %
Satellite*	83.6	79.1	+ 6 %
Terrestrial	79.4	83.7	- 5 %
IPTV	16.0	12.1	+ 33 %

\*) Includes reception from SES as well as from other operators.

### Digital TV reception in Europe

(Households in millions)	2011	2010	Change
Cable	32.9	29.4	+ 12 %
Satellite	81.4	75.2	+ 8 %
DVB-T	55.6	51.7	+8 %
IPTV	16.0	12.1	+ 33 %

### Digitization rate: Share of digital TV across all households

	2011	2010
Cable	48 %	42 %
Satellite	97 %	95 %
Terrestrial	70 %	62%
IPTV	100%*	100%*

\* IPTV is fully digital per definition

### ASTRA reach in Europe

(Households in millions)	2011	2010	Change
In Satellite	61.7	57.6	+ 7 %
In Cable	66.1	67.8	- 2 %
In IPTV	14.6	9.8	+ 48 %
Total	142.4	135.2	+ 5 %



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#### **About SES**

SES is a world-leading satellite operator with a fleet of 50 geostationary satellites. The company provides satellite communications services to broadcasters, content and internet service providers, mobile and fixed network operators and business and governmental organisations worldwide.

SES stands for long-lasting business relationships, high-quality service and excellence in the broadcasting industry. The culturally diverse regional teams of SES are located around the globe and work closely with customers to meet their specific satellite bandwidth and service requirements.

SES (Euronext Paris and Luxembourg Stock Exchange: SESG) owns and operates the ASTRA Satellite System. It holds participations in Ciel in Canada and QuetzSat in Mexico, as well as a strategic participation in satellite infrastructure start-up O3b Networks. Further information under: [www.ses.com](http://www.ses.com).