

Utilizing Satellite to Promote Digital Broadcasting

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Building a digital transition roadmap for Africa

Digital Switchover & Satellite

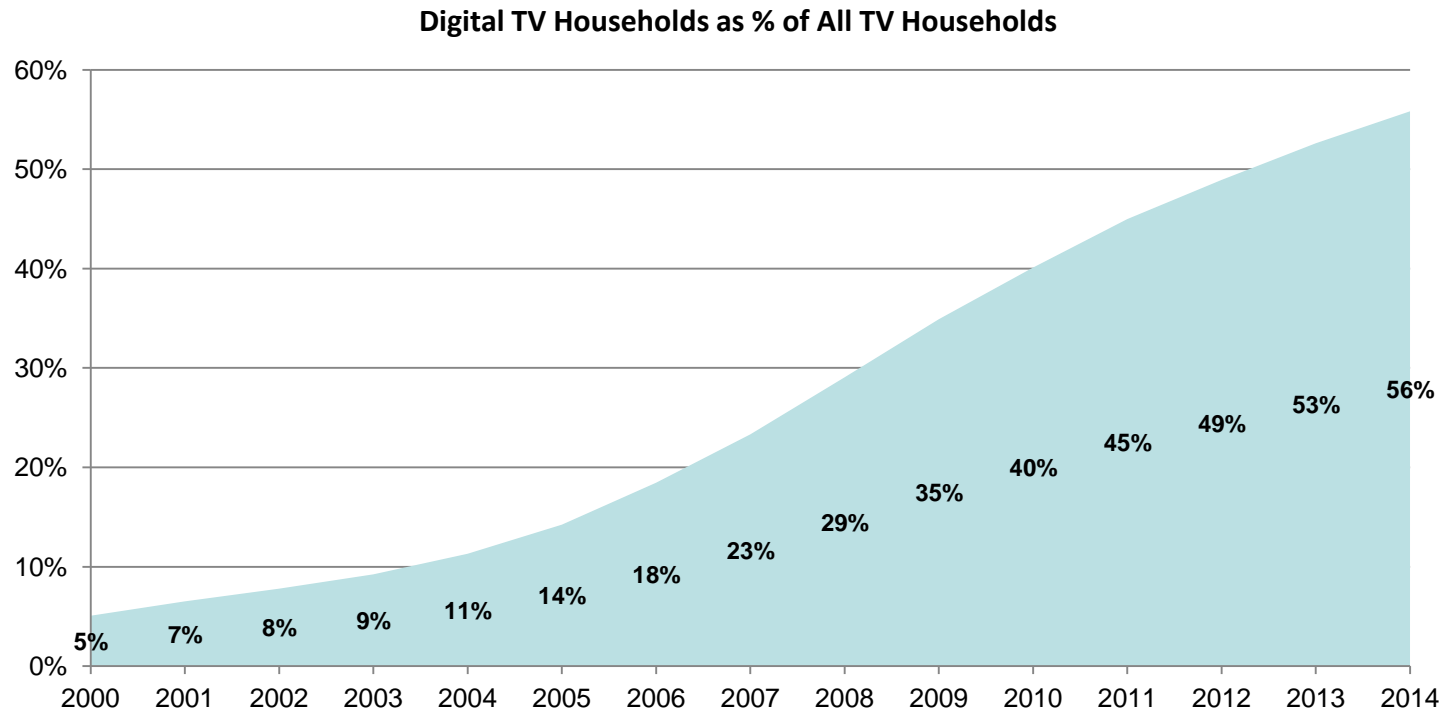
Key Topics

- **Analogue to Digital -The Global Picture**
- **Switch-over Lessons Learnt.**
- **Africa TV Market – a helicopter view**

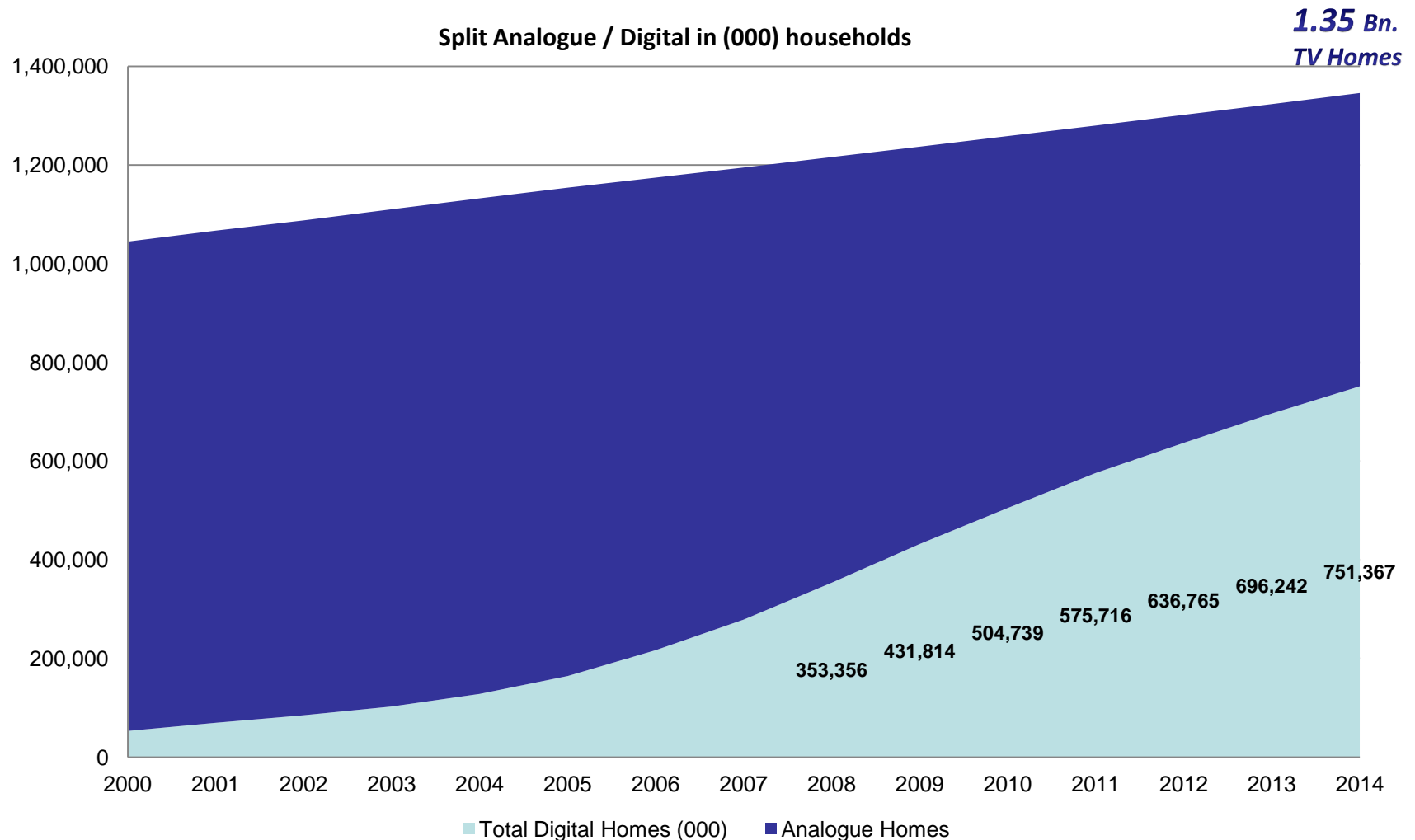
- **Intelsat and the Digital African Media Landscape**
- **The true size of Africa**

Analogue to Digital – The Global Picture

- 1.35 billion TV Households on this Planet
- Not all of them are Digital TV yet...



Analogue to Digital – The Global Picture



Source: Informa DTV Research & Intelsat

Switch-over Lessons Learnt...

- Various strategies have been applied
(*benefits & drawbacks are known*)

- Examples:

Phased roll-out with few transmitters in densely populated urban areas first (Germany DTT).

=== *Access to a lot of people at lower cost*

Or the opposite, DTT roll-out in rural areas first in countries much more reliant upon Terrestrial TV

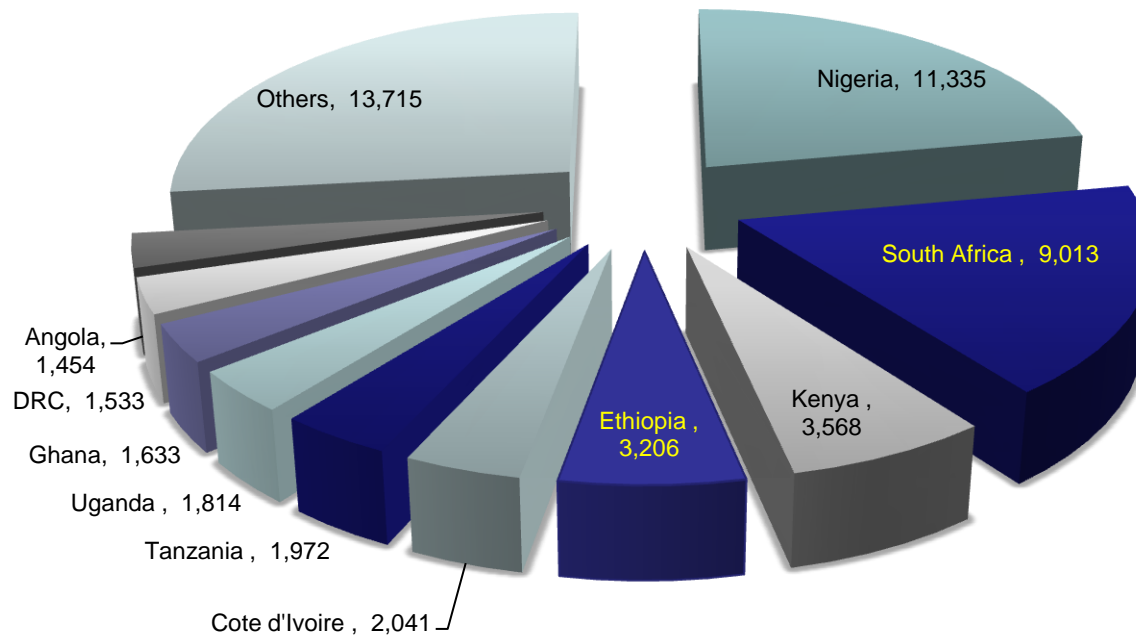
- Also (commercial) models to get TV viewers “Digitized” are tried & tested



Africa TV Market – helicopter view

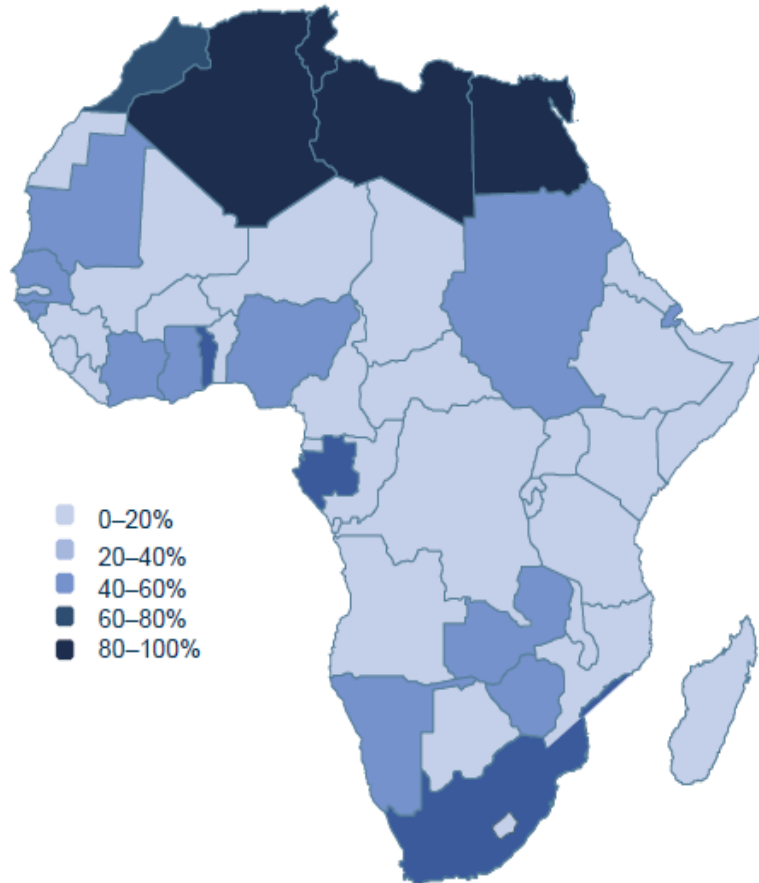
- 148 million households in Sub Saharan countries in end-2012.
- *Will rise by another 22 million over the next 6 years.*
- Number of people in region to exceed 1 Billion by 2017

Split of TV Households per Sub Saharan Country in 2018 (%)



Africa TV Market – helicopter view

Proportion of households that have a least one television, Africa, July 2012 [Source: Analysys Mason, 2012]



2012 **2022**

63 M

108 M

Source: NSR_DTH6 July 2013

Intelsat is Listening

What we hear...

- Our customers need help to implement the Digital Switch Over
- Countries want their DTT programming to reach their entire population as well as their diaspora in neighboring countries
- Solution should be flexible and scalable
- Governments look for cost-effective solutions



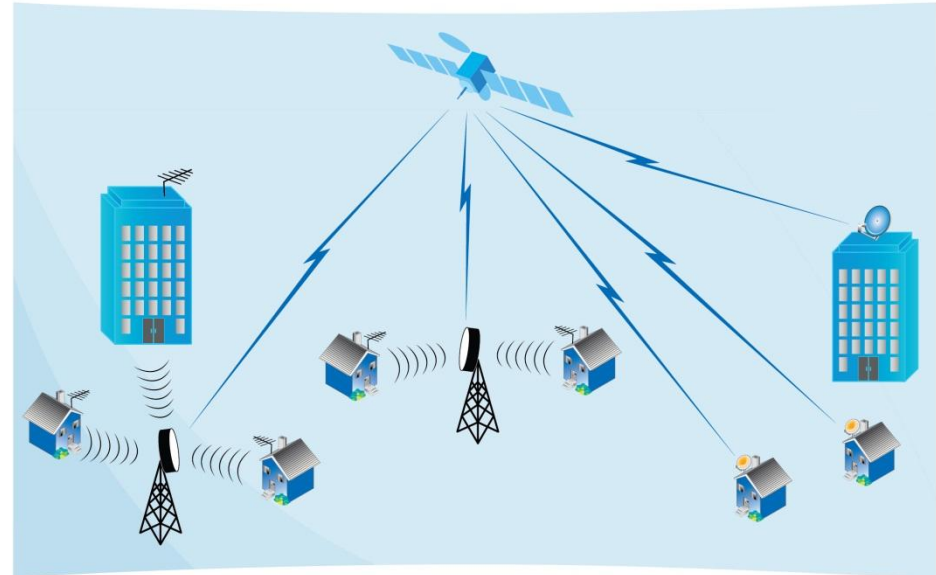
- Desire to enable local content
- DTT bouquets should include local and regional content relevant to each country, and value content from abroad
- Countries should retain sovereignty and control of their content and of their viewership



Intelsat DTT Offer

Hassle-Free, Efficient, Reliable Solution

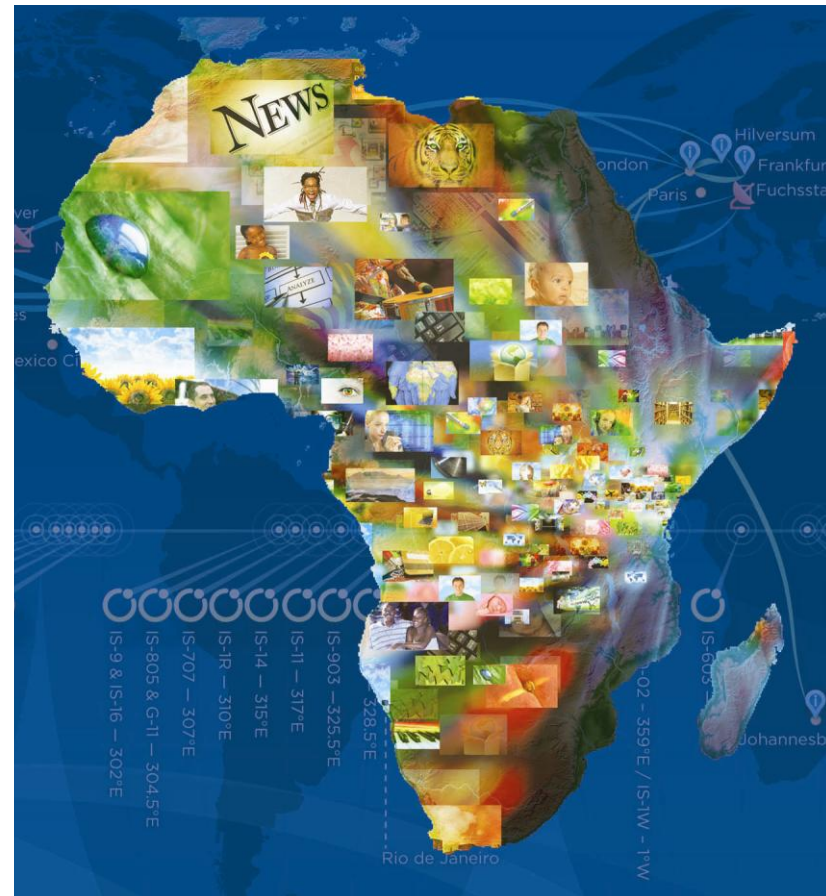
- A satellite solution is quick, ubiquitous and scalable
- Satellite ensures maximum availability
- Solution based on the most advanced DTT technologies
- DTH can be used as a gap-filler for full population coverage
- Flexible and scalable solution allows countries to start small and grow incrementally
- African content is connected to the global IntelsatOne network



Intelsat Makes DTT Roll Out Easy

As a Result...

- African countries meet their obligations
- Each country benefits from its own country-wide DTT operation
- Each country controls line-up for its population and reaches out to its diaspora in neighboring countries
- Local content reaches larger audience
- Content is an attractive mix of local, regional, and international channels
- African content accesses the world through the IntelsatOne network
- Intelsat's experience guarantees piece of mind and flawless execution



The True Size of Africa



Intelsat S.A. The World's Leading Provider of Satellite Services

Thank You!
Annemarie Meijer