

An aerial photograph of a winding river in a desert landscape. A white commercial airplane is flying over the river, leaving a thick white contrail. The river is a mix of brown and green, with some white sandbars. The surrounding land is dry and yellowish-brown. In the top left corner, there is a small black icon of a person walking. The overall composition is artistic and evocative.

SES

SES[▲]

beyond frontiers

PRESENTED BY
Håkan Sjödin

PRESENTED ON
12 June 2018

The World's Leading Satellite Operator



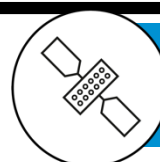
GEO wide beam

- ▲ Over 50 satellite constellation
- ▲ Reaching 351 million TV households worldwide



GEO HTS

- ▲ Expanding GEO HTS fleet
- ▲ Improving value proposition for data applications



MEO HTS

- ▲ 16 satellite constellation plus 4 more launching in 2019 and 7 from 2021
- ▲ High throughput, lowest latency
- ▲ 5 years ahead of competition

Fleet

71

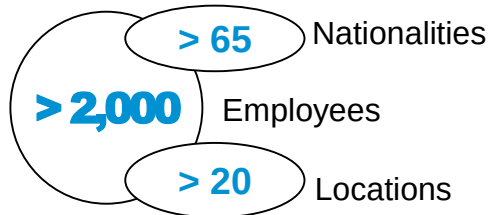
Satellites

Coverage

99%

of the globe
and world
population
covered

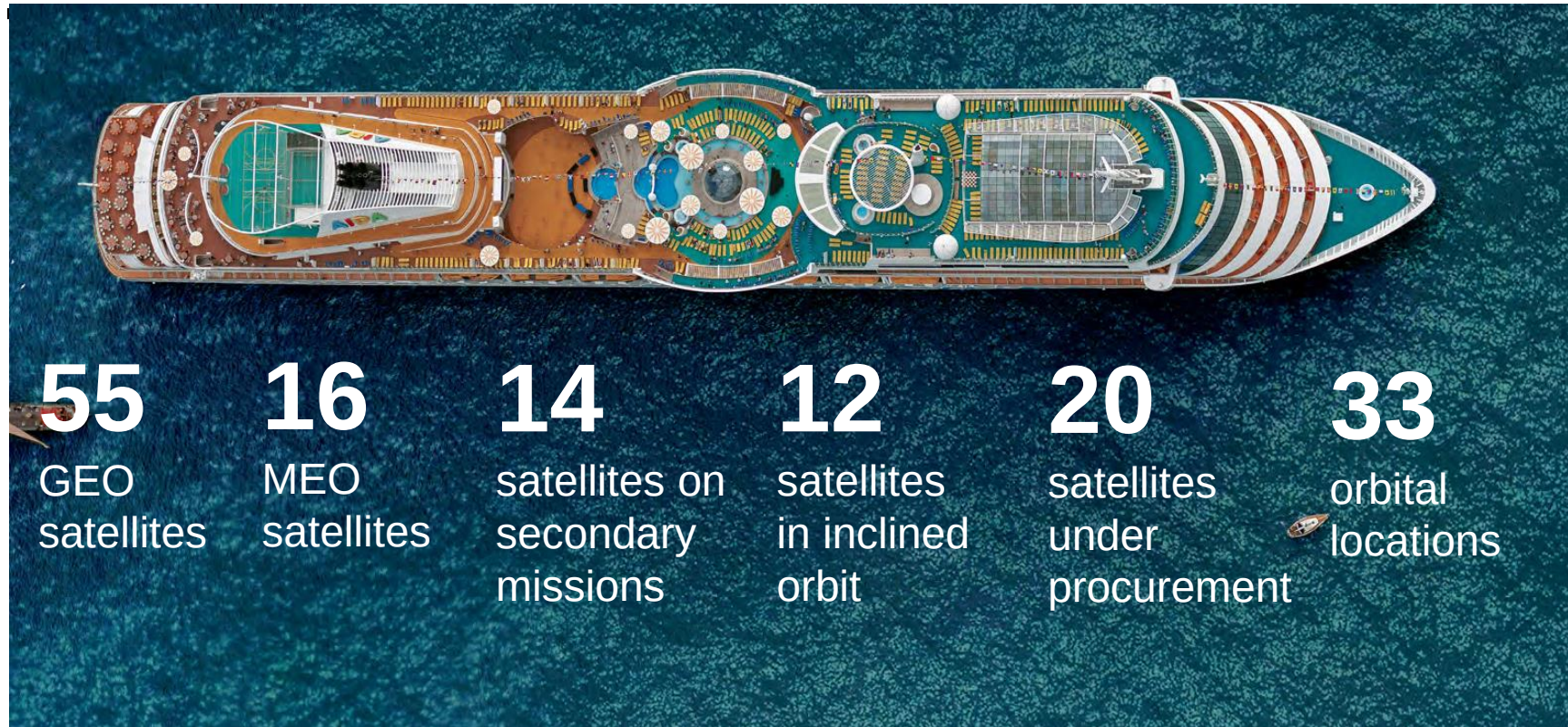
Presence



Revenue

2B Revenue
in euros

Global Infrastructure



Leading Satellite Operator & Dynamic Market Leader

PARTNER OF CHOICE

serving over
700 broadcasters,
telcos, enterprises,
governments and
institutions in over
130 countries



OFFICES

Accra | Ghana
Addis Ababa | Ethiopia
Bucharest | Romania
Dubai | United Arab Emirates
The Hague | The Netherlands
Istanbul | Turkey
Johannesburg | South Africa
Kiev | Ukraine
Lagos | Nigeria
London | UK
Madrid | Spain
Mexico City | Mexico
Moscow | Russia
Munich | Germany
Paris | France
Princeton | USA
Riga | Latvia
São Paulo | Brazil
Singapore | Singapore
Stockholm | Sweden
Warsaw | Poland
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SES Press Meeting

Georgia 2018



PRESENTED BY
Ricardo Topham

PRESENTED ON
12 June 2018

Agenda

- 1 SES reach worldwide and TV channels
- 2 The European TV market
- 3 SES reach in Europe
- 4 Highlights of Georgia TV market
- 5 Key take-aways

An aerial photograph of a modern city district, likely a waterfront area. The image shows a river flowing through the center, with a large bridge crossing it. The bridge has a distinctive white, lattice-like structure. On either side of the river, there are modern buildings, green spaces, and parking areas. The lighting suggests it's either early morning or late afternoon, with long shadows cast across the landscape. The overall scene is a mix of urban development and natural elements.

SES[^]

**SES REACH
WORLDWIDE
AND TV
CHANNELS**

Satellite Monitors

Over 20 years of research



SURVEYS

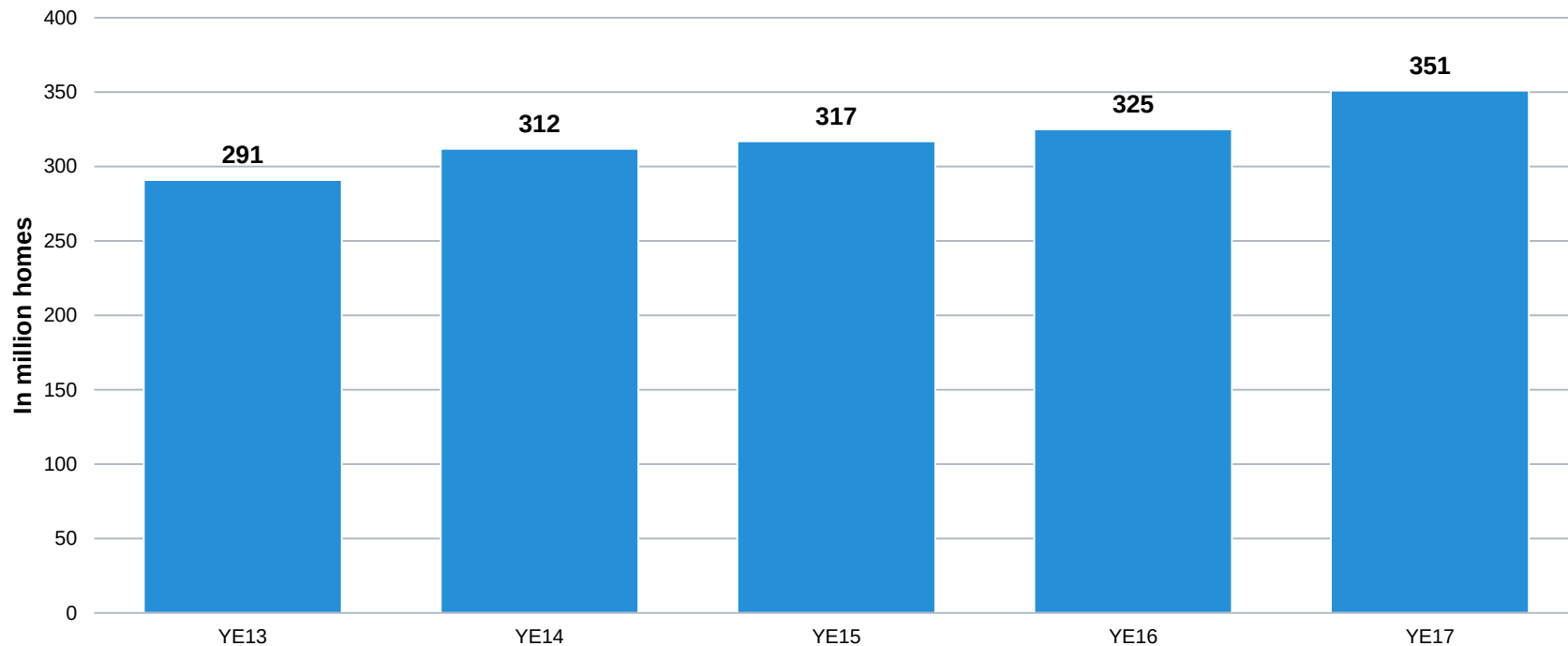
RESEARCH

DATA

**Satellite
Monitors**

SES reach worldwide

Experiencing solid growth

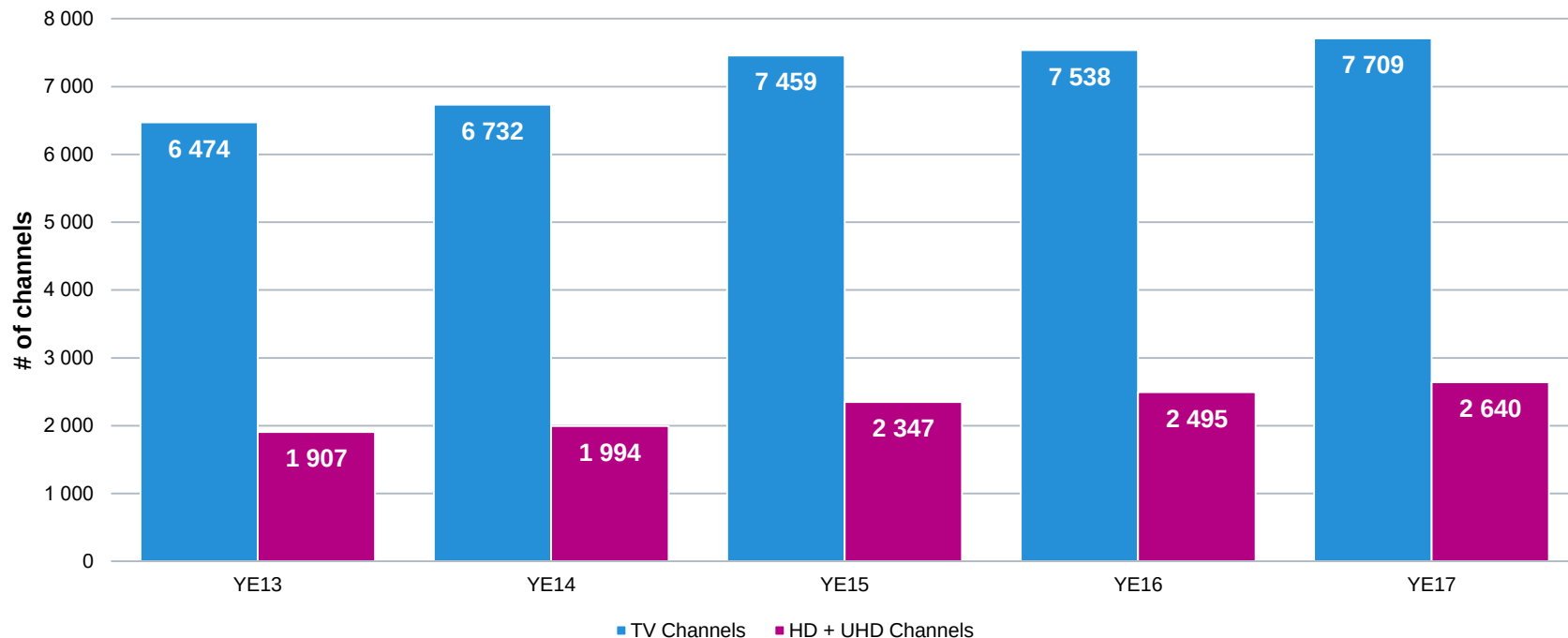


Source: SES, Satellite Monitor YE17, B2B surveys among cable head-ends in North and Latin America, Pay-TV operators' figures, SES analyses & estimates

Note: SES reach includes subscribers reached via Ciel-2's spot beams

SES HD channels

Increased by 38% since 2013



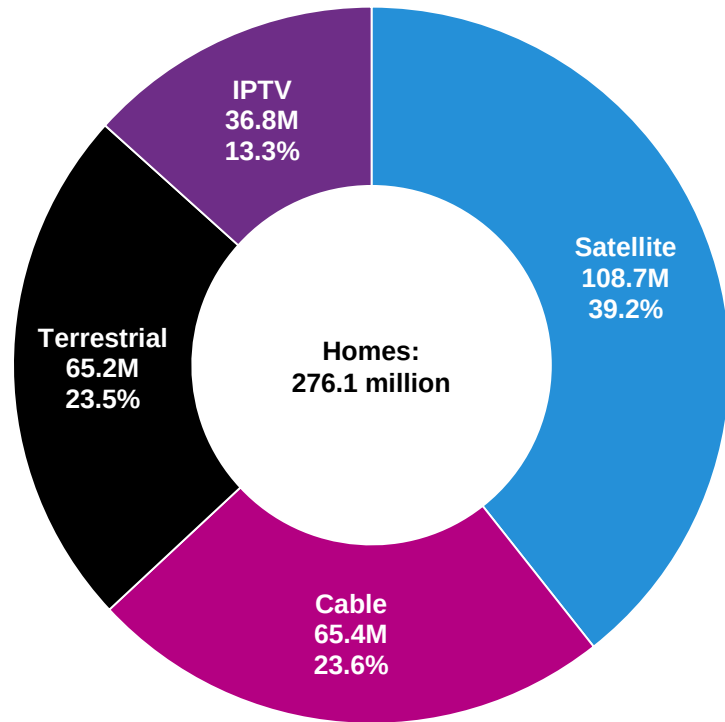
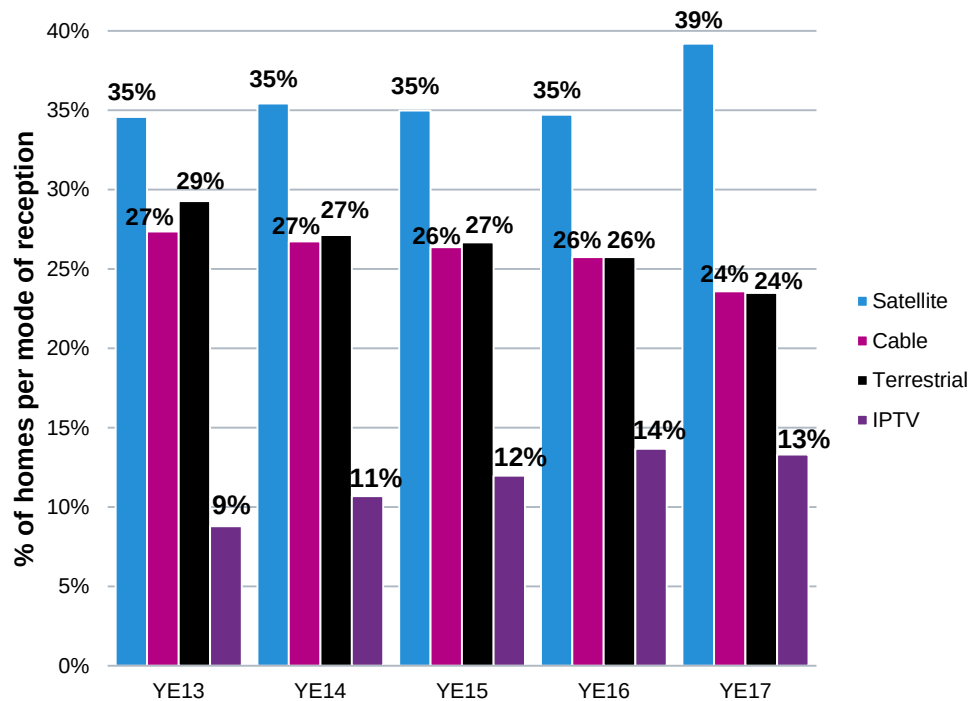
Source: Lyngsat Q4 2017

An aerial photograph of the Wimbledon tennis grounds in London. The image shows a large, circular stadium (Centre Court) with a grey roof, surrounded by several rectangular tennis courts. The courts are green with white lines, and many are filled with spectators. The stadium is surrounded by trees and a parking lot. The text "SES" is visible in the top right corner.

SES

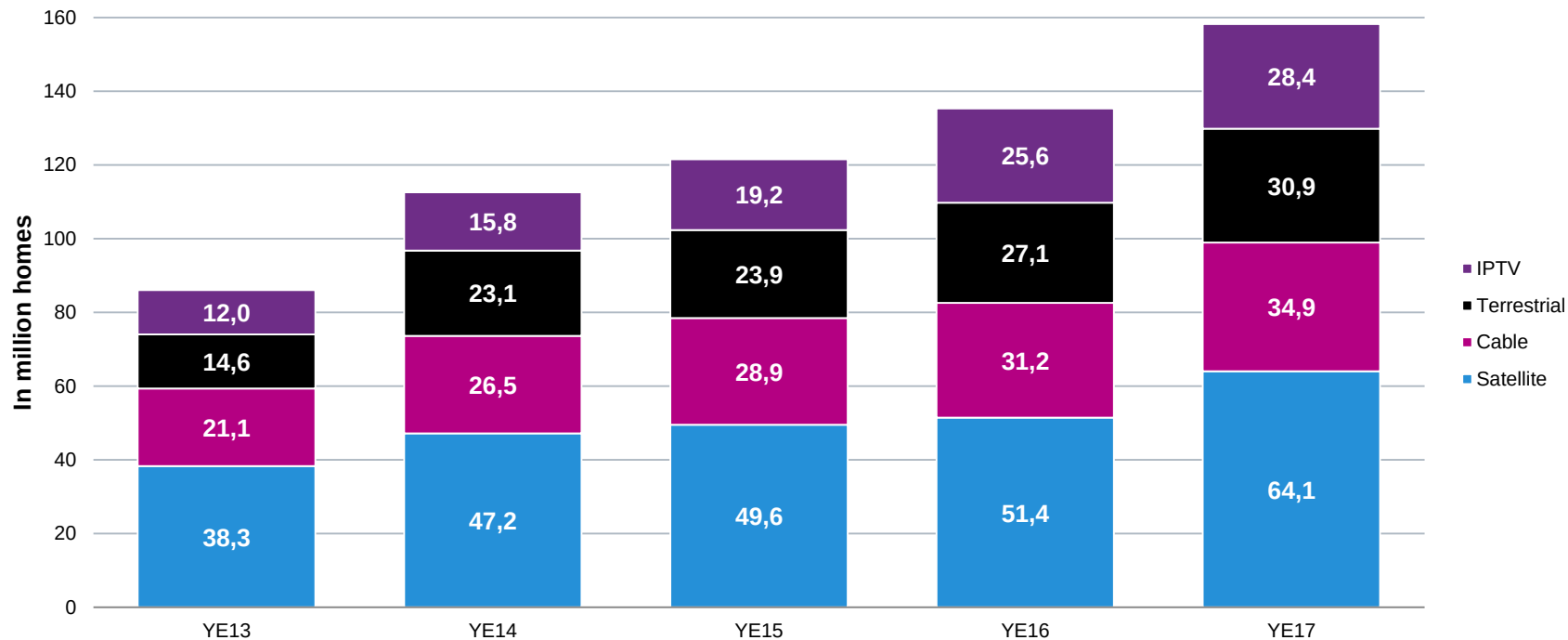
THE EUROPEAN TV MARKET

Satellite strong in both mature and growing markets



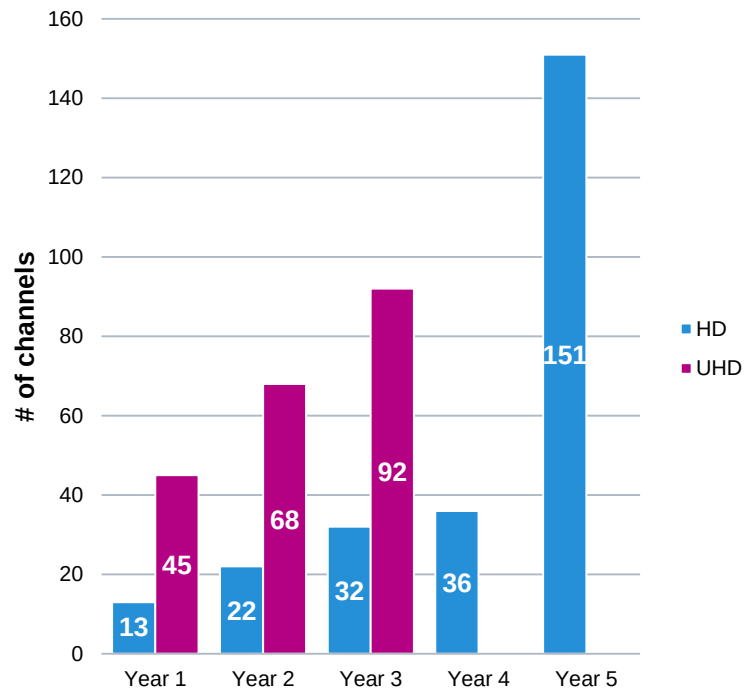
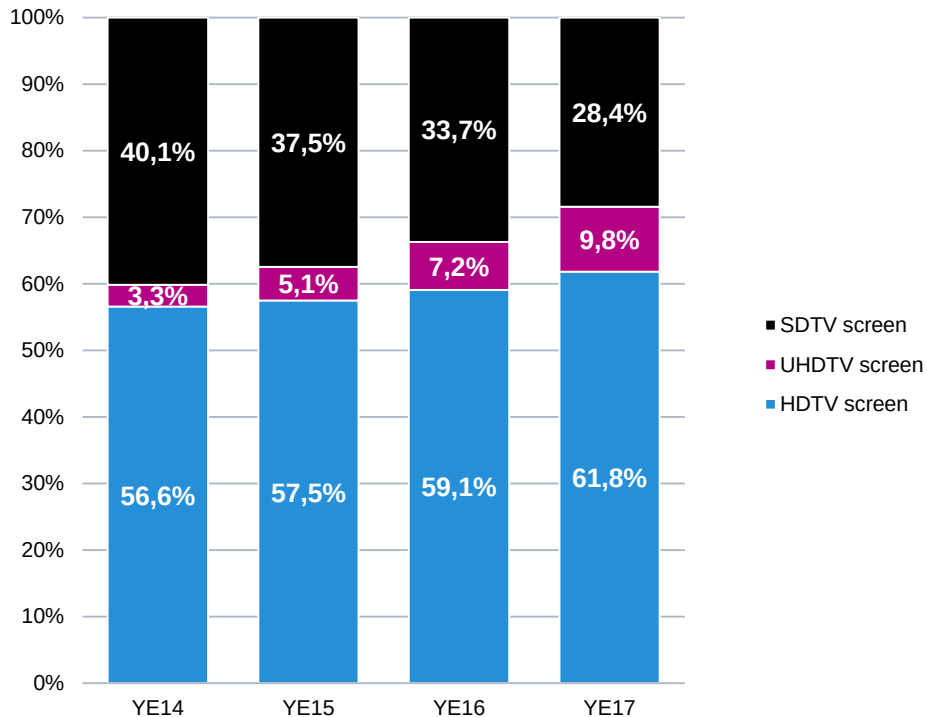
Source: Satellite Monitors YE2017

Satellite outperforms other infrastructures in HD



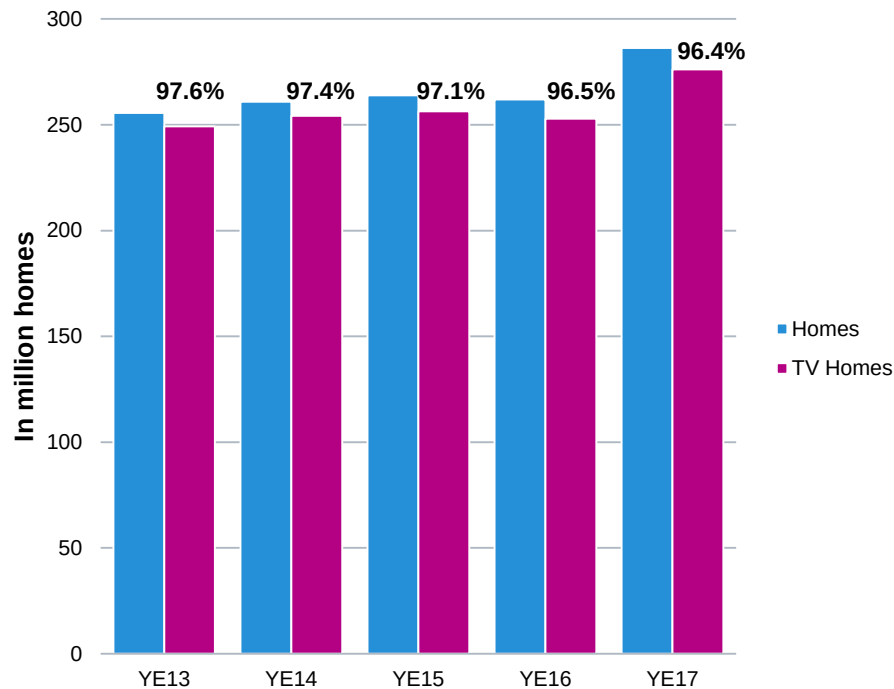
Source: Satellite Monitors YE2017

UHDTV sets present in 10% of European homes



Source: Satellite Monitors YE2017, Lyngsat Q4 2017

OTT complementary to linear TV in Europe



Note: TV homes are those homes equipped with a TV set and a classic mode of TV reception (satellite, cable, terrestrial, or IPTV)

Source: Satellite Monitors YE2017

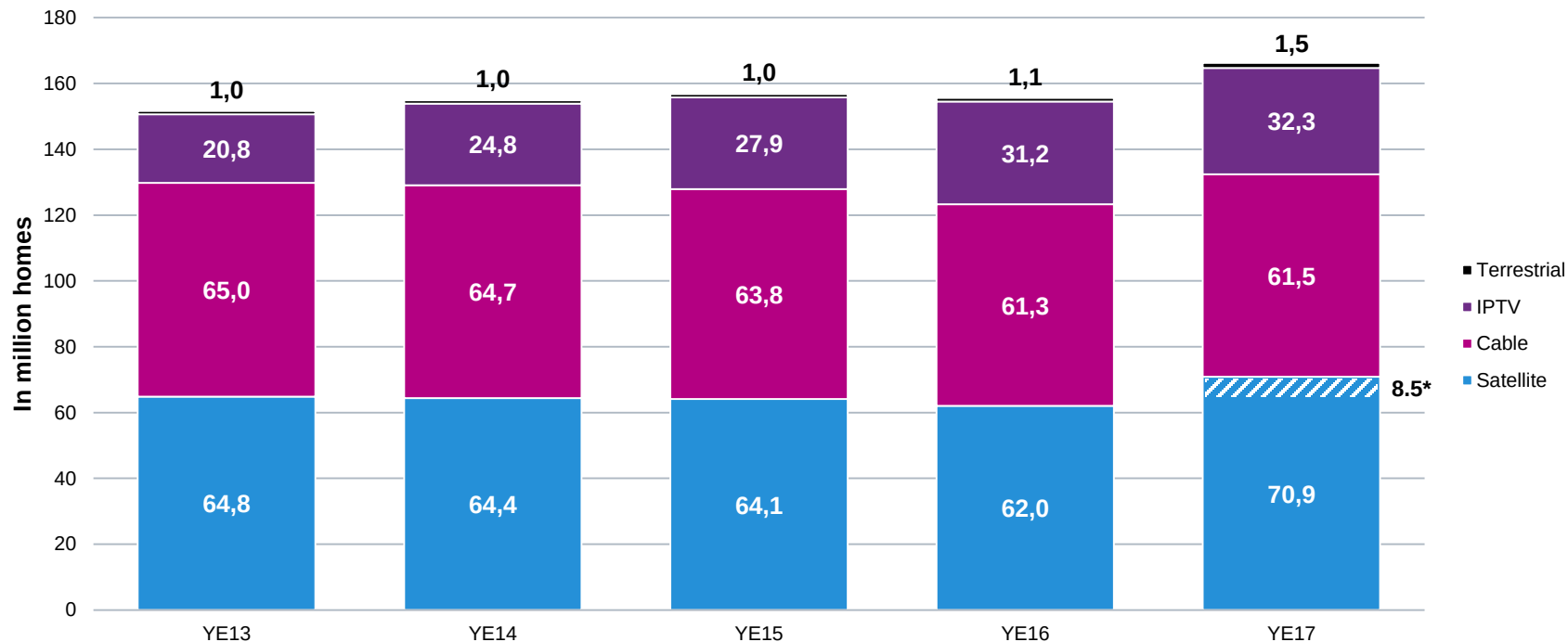
- ▲ We asked homes equipped with both a classic mode of TV reception and OTT:
 - “Do you plan or are you thinking about replacing your “normal” TV reception with watching TV and video content on the internet only within the next 12 months?”
- ▲ Result: **84% do not plan on using OTT only** to watch TV and video content



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SES REACH IN
EUROPE

Satellite leads SES reach in Europe



* Contribution of Turkey and recent growth in the Maghreb to satellite reach

Source: Satellite Monitors YE2017

Total SES reach in Europe per orbital position



4.8°E / 5.0°E

52M

27M HD



23.5°E

38M

27M HD



19.2°E

118M

82M HD



28.2°E / 28.5°E

46M

35M HD



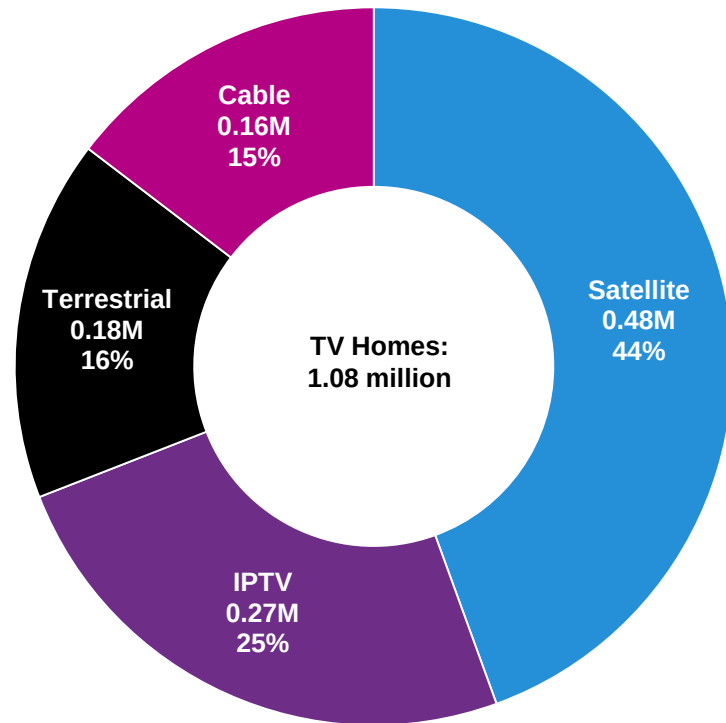
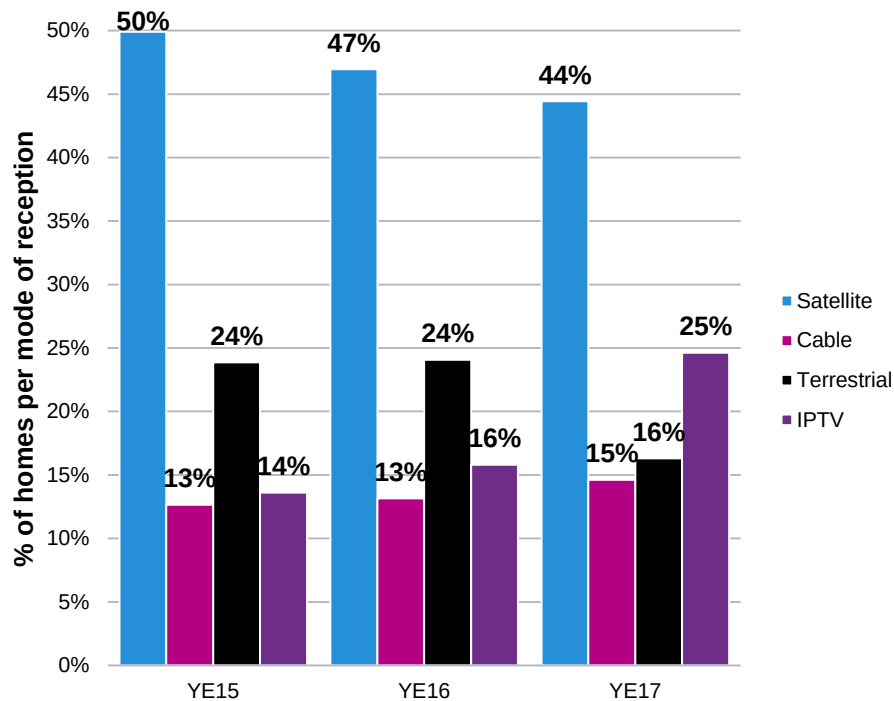
31.5°E

15M

4M HD

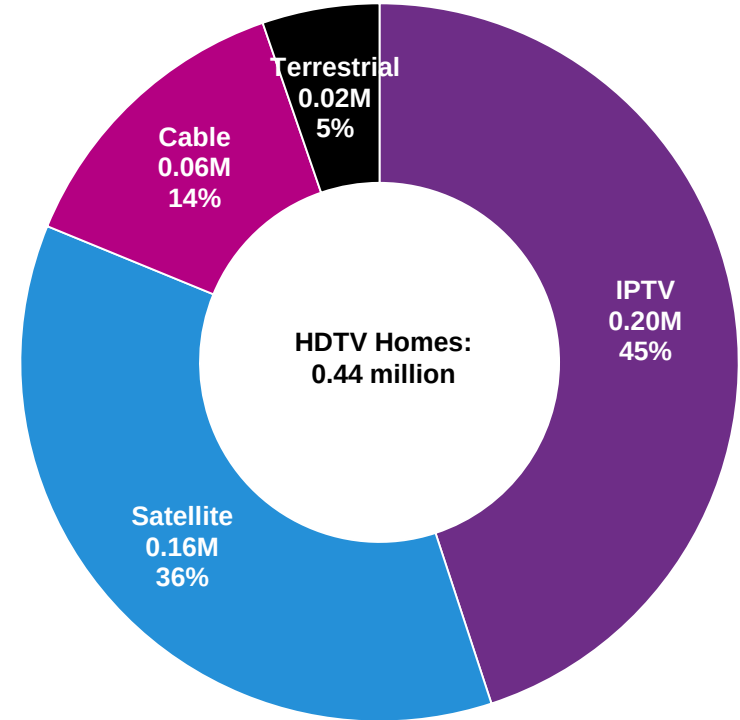
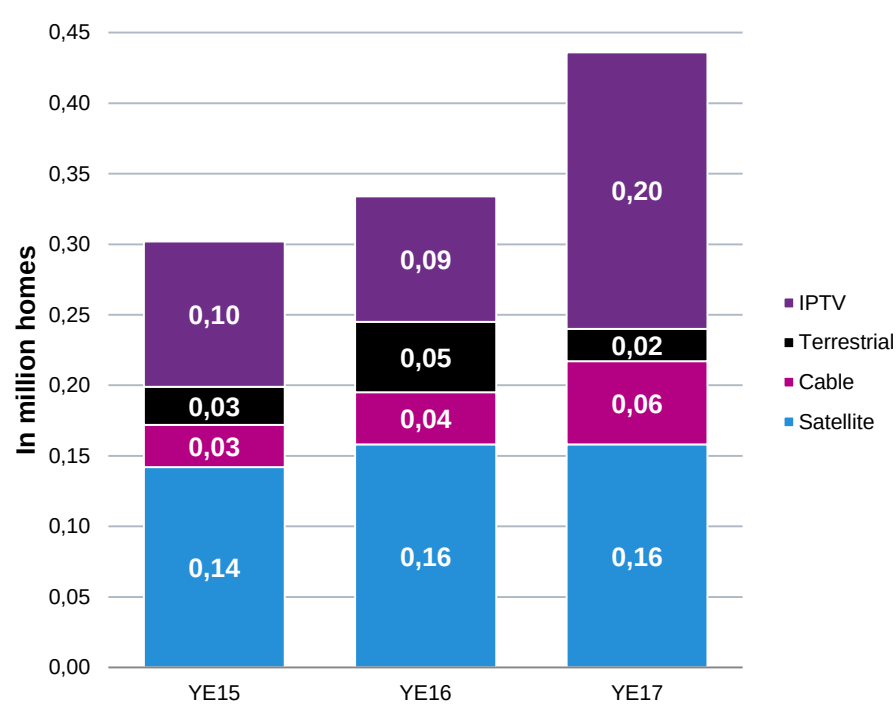
HIGHLIGHTS OF GEORGIA TV MARKET

Satellite leads in the Georgian TV market



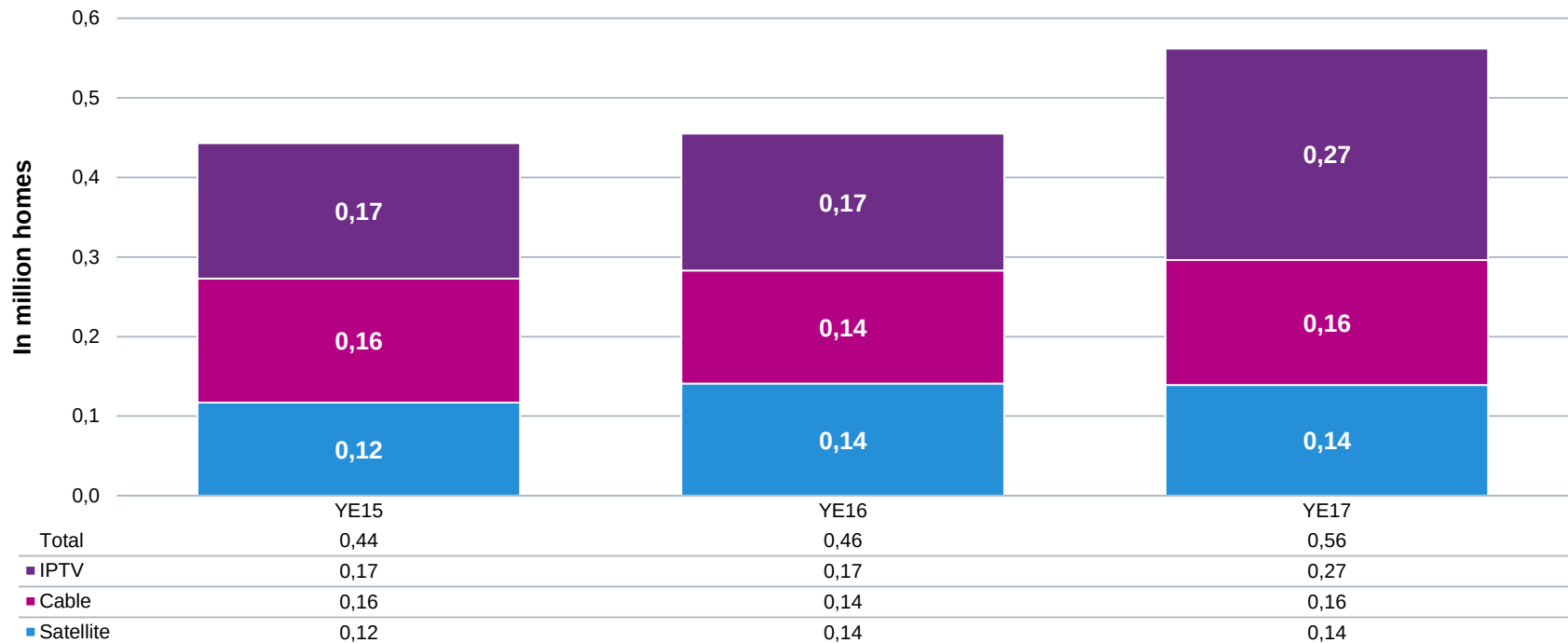
Source: Satellite Monitors YE2017

Almost half a million homes enjoying HD content



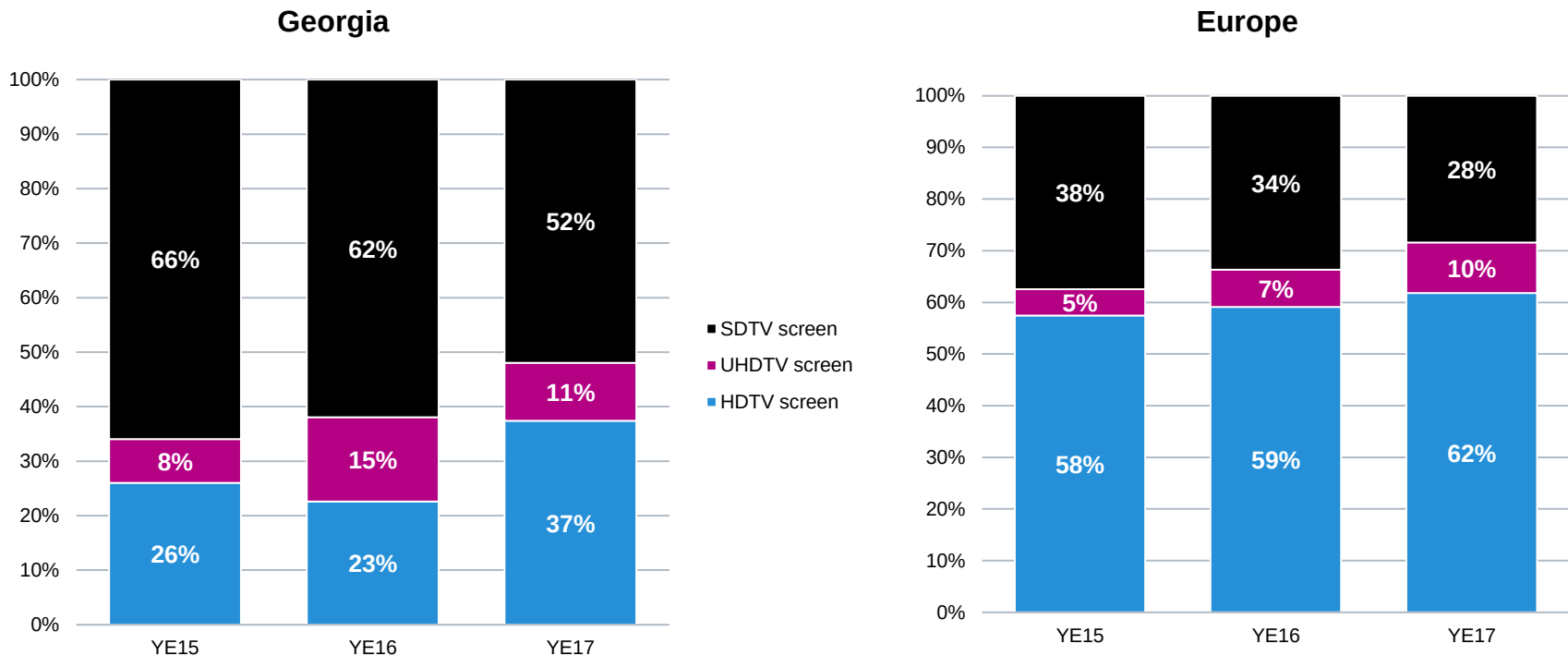
Source: Satellite Monitors YE2017

SES serves over half a million homes



Source: Satellite Monitors YE2017

Standard definition TV sets being replaced by HD and UHD sets



Source: Satellite Monitors YE2017

KEY TAKE-AWAYS



Key take-aways

- ▲ Satellite the leading TV reception mode: **44% homes receive TV channels via satellite**
- ▲ SES has a strong presence in the country: **0.56 million homes receive TV channels broadcast by its satellites**
- ▲ HD continues to grow: **0.44 million homes now enjoy HD content**
- ▲ HD and UHD TV sets' penetration increasing: **48% in YE2017, compared to 38% in YE2016**

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