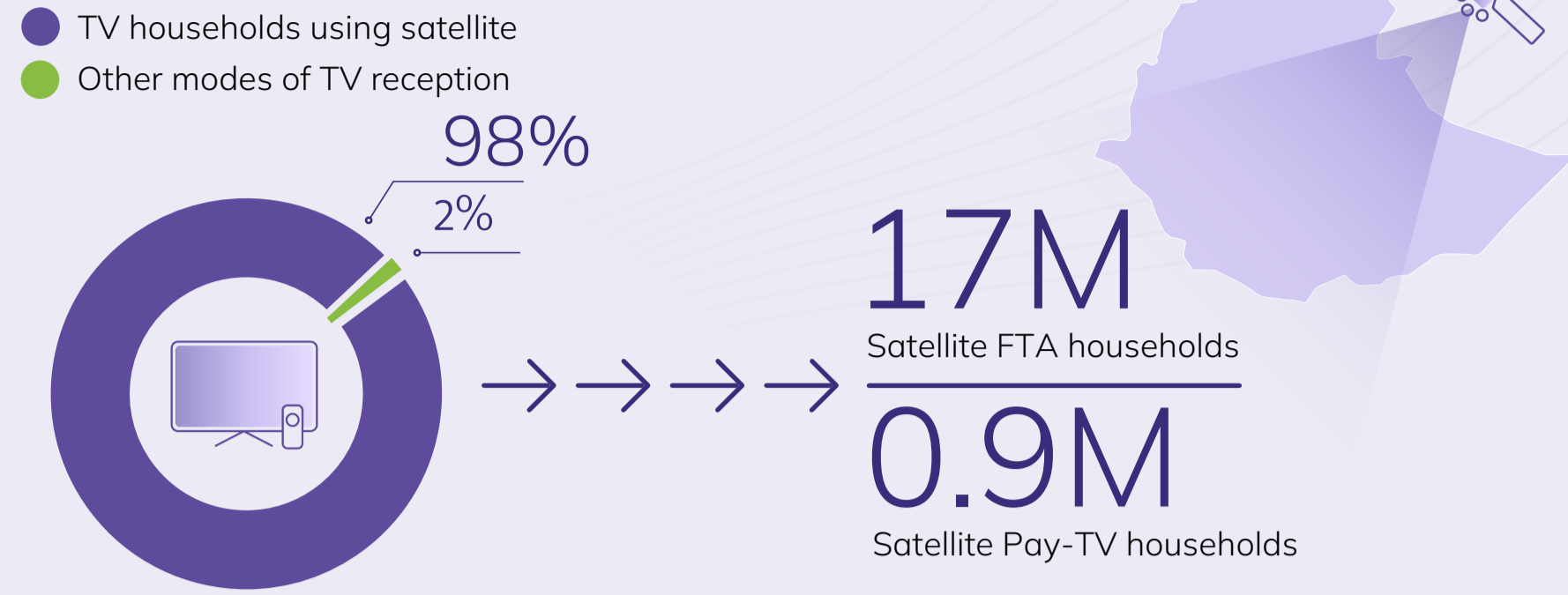


# Ethiosat Satellite Dominance

## Enabling TV market growth in Ethiopia

Leveraging satellite is the key to unlocking further expansion of TV households in Ethiopia

### Satellite dominates the TV landscape



### Satellite is the dominant distribution method in Ethiopia with SES

9.5 out of 10 satellite homes in Ethiopia uses SES satellites



Recently, Ethiopia has seen huge growth in TV penetration adding more than 14 millions TV homes since 2017, with further room for growth considering that TV penetration is currently at 72%.

### SES is the major provider of satellite television in Ethiopia

TV homes using SES Satellites

17M  
Household reach

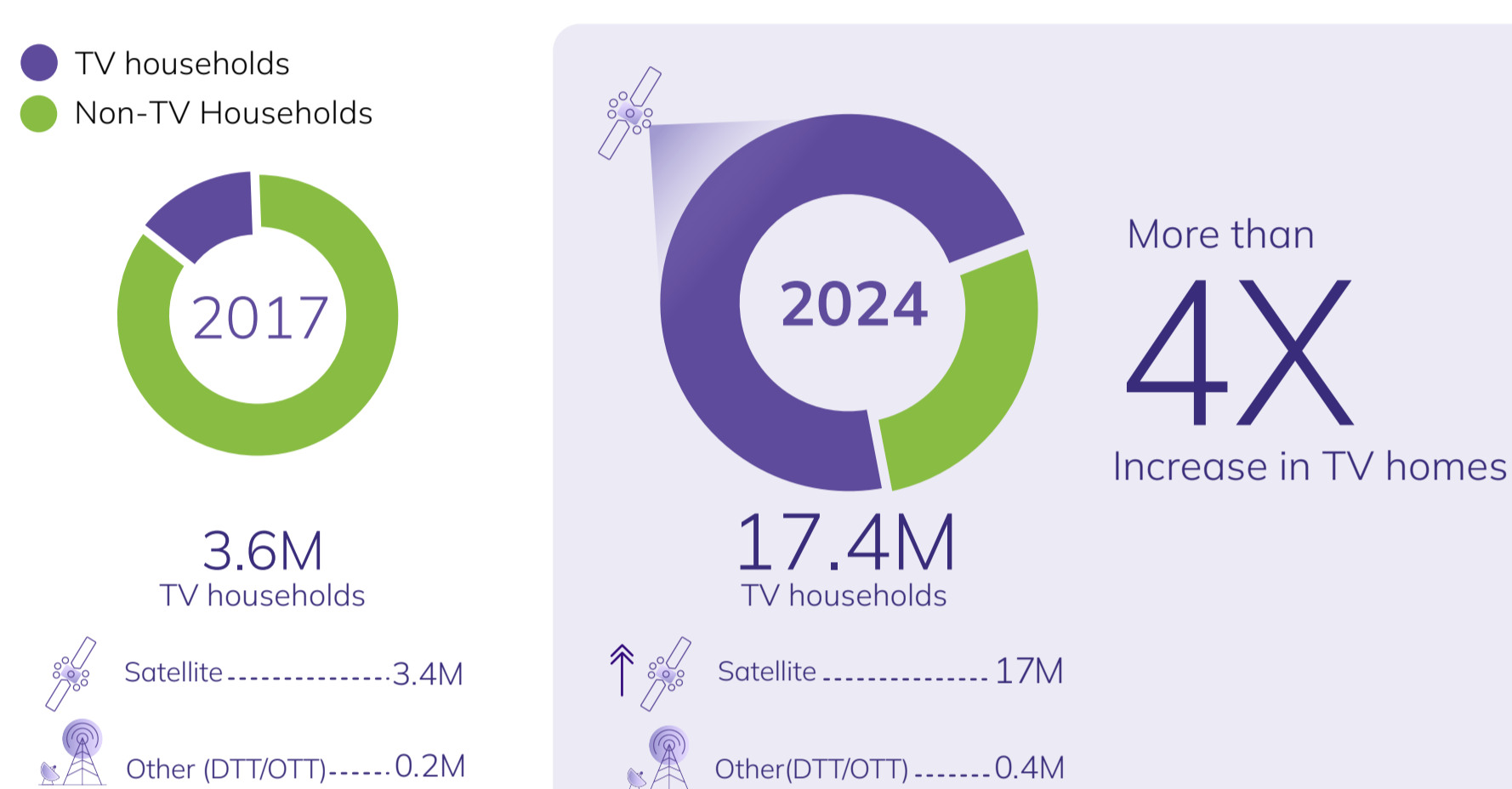


95%+  
Penetration in satellite homes



### The fast-growing TV market in Ethiopia

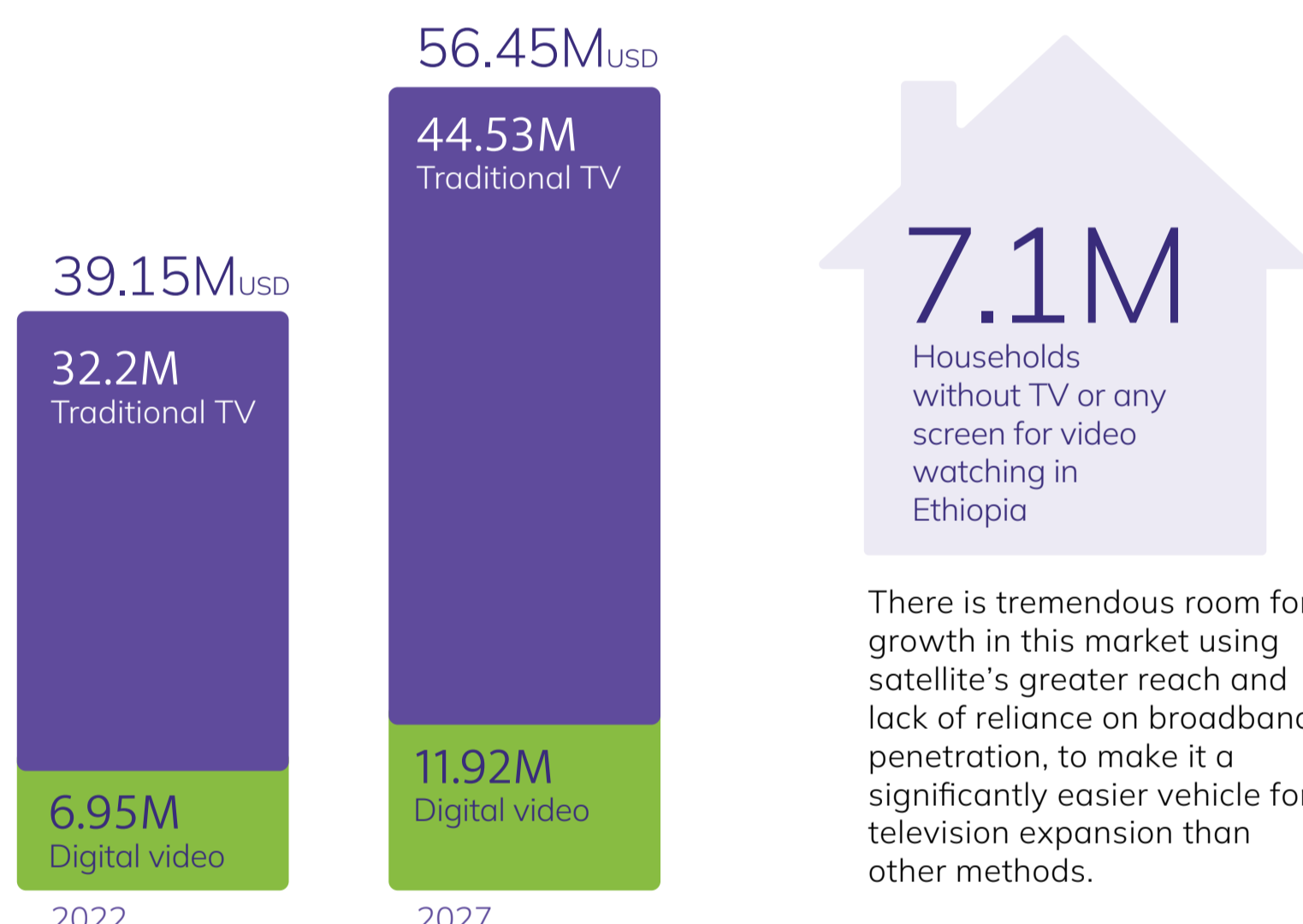
Satellite has substantially driven Ethiopian TV homes expansion.



With more than 126.5 million people, Ethiopia is Africa's second most populous nation. It is also one of the fastest growing TV markets on the continent. Since 2017 this market has seen explosive growth.

### The FTA opportunity in Ethiopia

Video market advertisement spending in Ethiopia



### Meeting Ethiopia's viewing needs

Ethiopia is well positioned to transition to HD services and beyond.



Ethiopia is a diverse country with viewers wanting to watch content in many different languages.



### Creating value for consumers, broadcasters and advertisers

Addressing the largest market via greater reach of over 95% of TV homes.



### Ethiosat

Ethiopia's first-ever dedicated free-to-air (FTA) platform enabling broadcaster & advertiser growth via greater reach.

