

DIGITAL & PAY TV IN EUROPE

HALF OF FAMILIES IN WESTERN EUROPE ARE NOW RECEIVING DIGITAL TELEVISION

- GROWTH OF DIGITAL TERRESTRIAL TELEVISION IS DRIVING THE MARKET IN ALMOST ALL COUNTRIES
- IN EUROPE’S FIVE BIGGEST MARKETS, SPAIN AND FRANCE ARE SHOWING THE FASTEST GROWTH IN DIGITAL TELEVISION, WHILE THE EXPANION IN ITALY HAS SLOWED
- SATELLITE REMAINS THE DOMINANT PAY-TV PLATFORM BUT IPTV AND DTT ARE GROWING RAPIDLY

e-Media Institute (www.e-mediainstitute.com) has published today its new maps highlighting the television market in Western European countries.

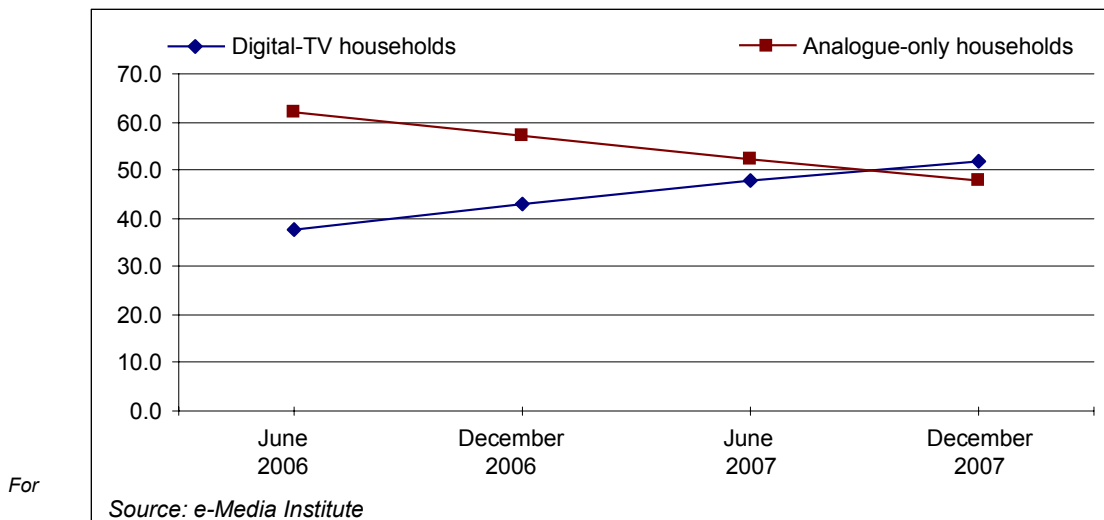
Digital television in Western Europe is reaching a **decisive milestone** this month, overtaking the analogue system for the first time. There are now about **83 million** households in the region’s 20 countries receiving digital television signals out of a total of 166 million TV households. At the end of June 2007, families equipped to watch digital TV made up **48%** of the total in Western Europe.

But European countries are moving towards a digital future at varying speeds: while some countries (the Netherlands, Luxembourg and Finland) have already switched off their analogue television signal, others are making slower progress towards full digitalisation. Italy is the only country where the take-up of digital TV is slowing: the country has slipped behind its neighbours France and Spain in terms of digital penetration and, in the first half of 2007, was 19th out of 20 in the region in terms of growth in the number of digital TV households (5.2%).

As regards pay television, satellite is still the major platform for services, with more than **23 million** subscribers. As of the end of June 2007, the number of satellite pay-TV subscribers in Western Europe increased 6.5% from a year earlier. Satellite-TV operators are also benefiting from increased sales of their channel packages on other, fast-growing platforms. IPTV and digital terrestrial television have seen high growth rates in the first six months of the year, even though the number of subscribers to pay-TV services on these platforms is low in absolute terms (3.8 million and 3.5 million respectively).

France, with **2 million** subscribers to pay-TV via ADSL as of end-June, remains the main – almost only - success story for IPTV in Europe. It is trailed by Spain with almost 500,000 subscribers.

Digital-TV and analogue-only households in Western Europe (in %)



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e-Media Institute is an independent organisation that provides a wide range of customised economic and socio-economic research-related services on media and telecommunications markets. e-Media Institute has offices in LONDON and MILAN and research correspondents in major global capitals.

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