

# El Mercado de la TV en España



**Presentado por**  
Ricardo Topham

**Presentado el**  
12 Mayo 2016

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Monitors**

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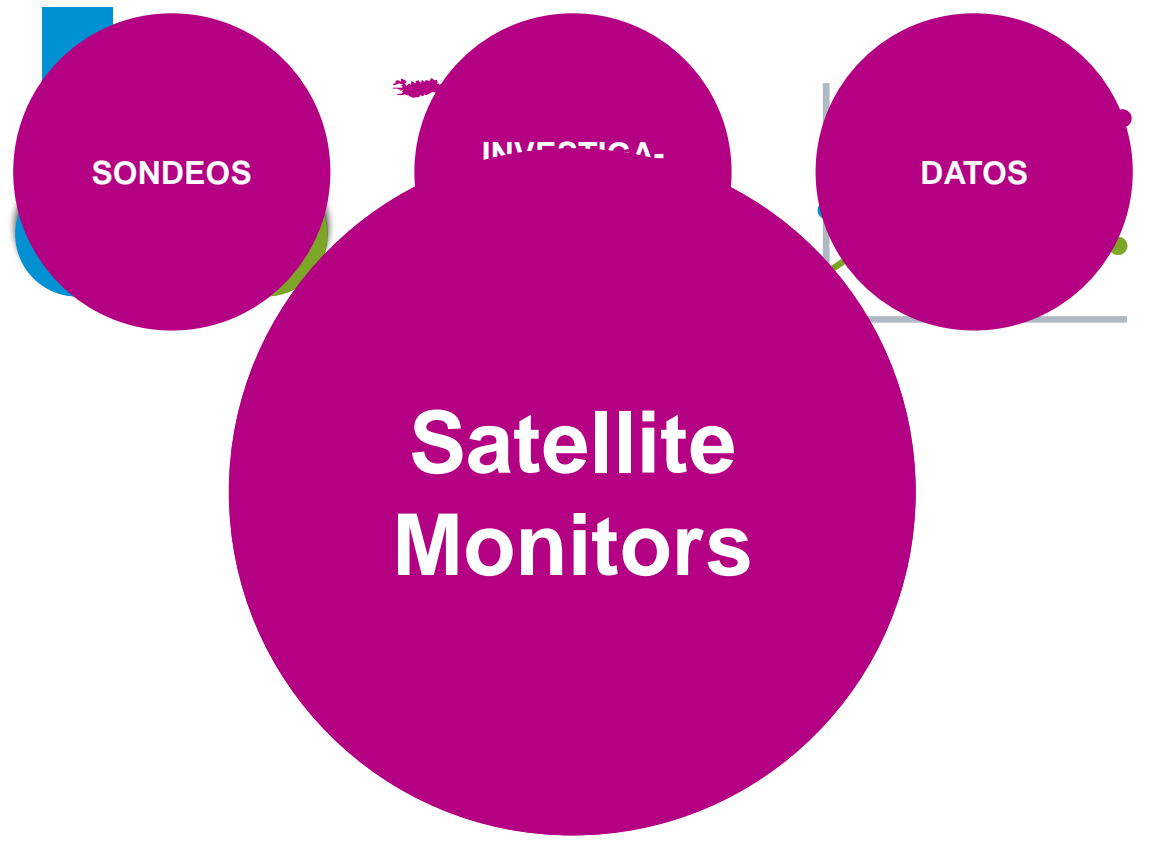
**Estado Actual  
del Ultra HD**

# Satellite Monitors

Fin 2015

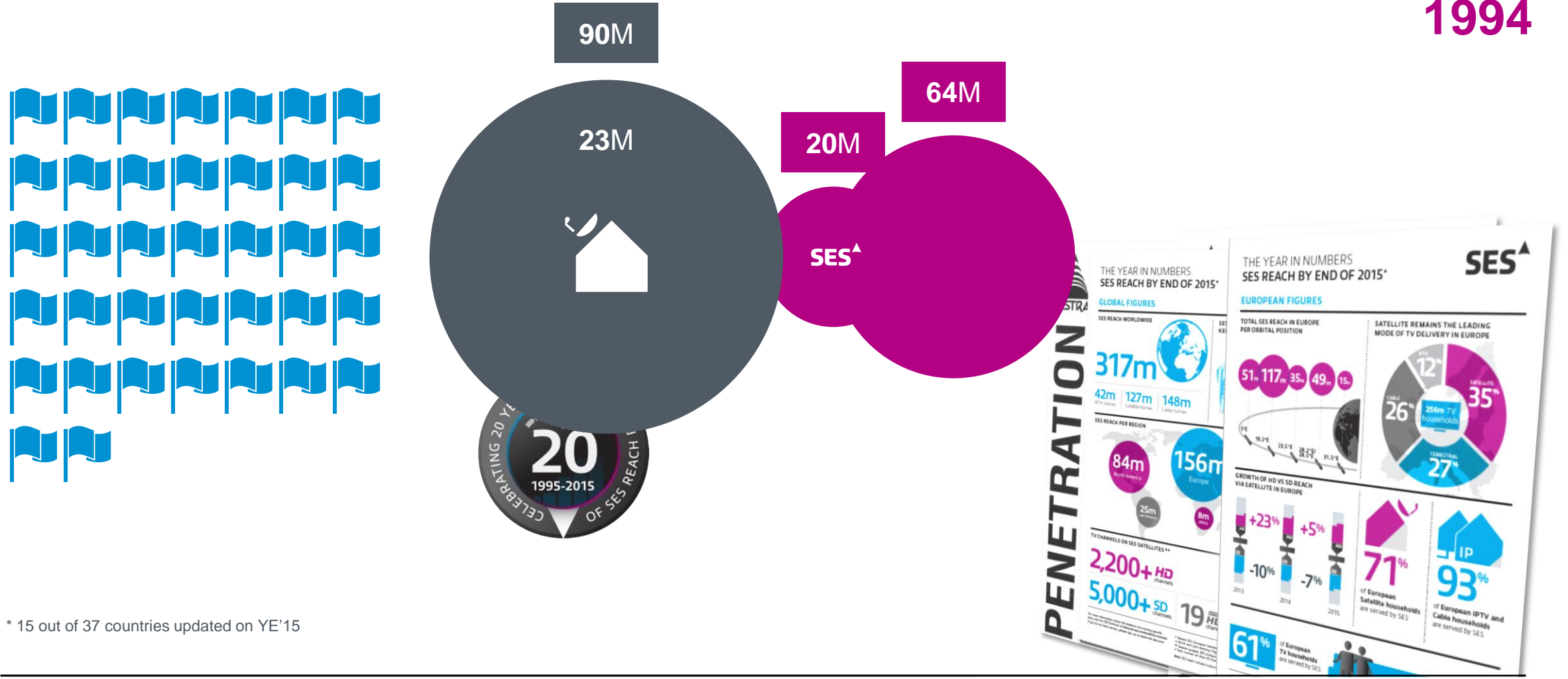


# Satellite Monitors en Europa: Más de 20 años de investigación



# Satellite Monitors en Europa: Más de 20 años de investigación

1994



\* 15 out of 37 countries updated on YE'15



# SES en Europa: Alcance y Mercado de la TV

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Fin 2015

# Alcance global de SES



Source: SES, Satellite Monitor YE'15, 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

# Alcance SES en Europa

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**IPTV**

**SATÉLITES SES**  
5°E, 19,2°E, 23,5°E,  
28,2°E/28,5°E,  
Y 31,5°E



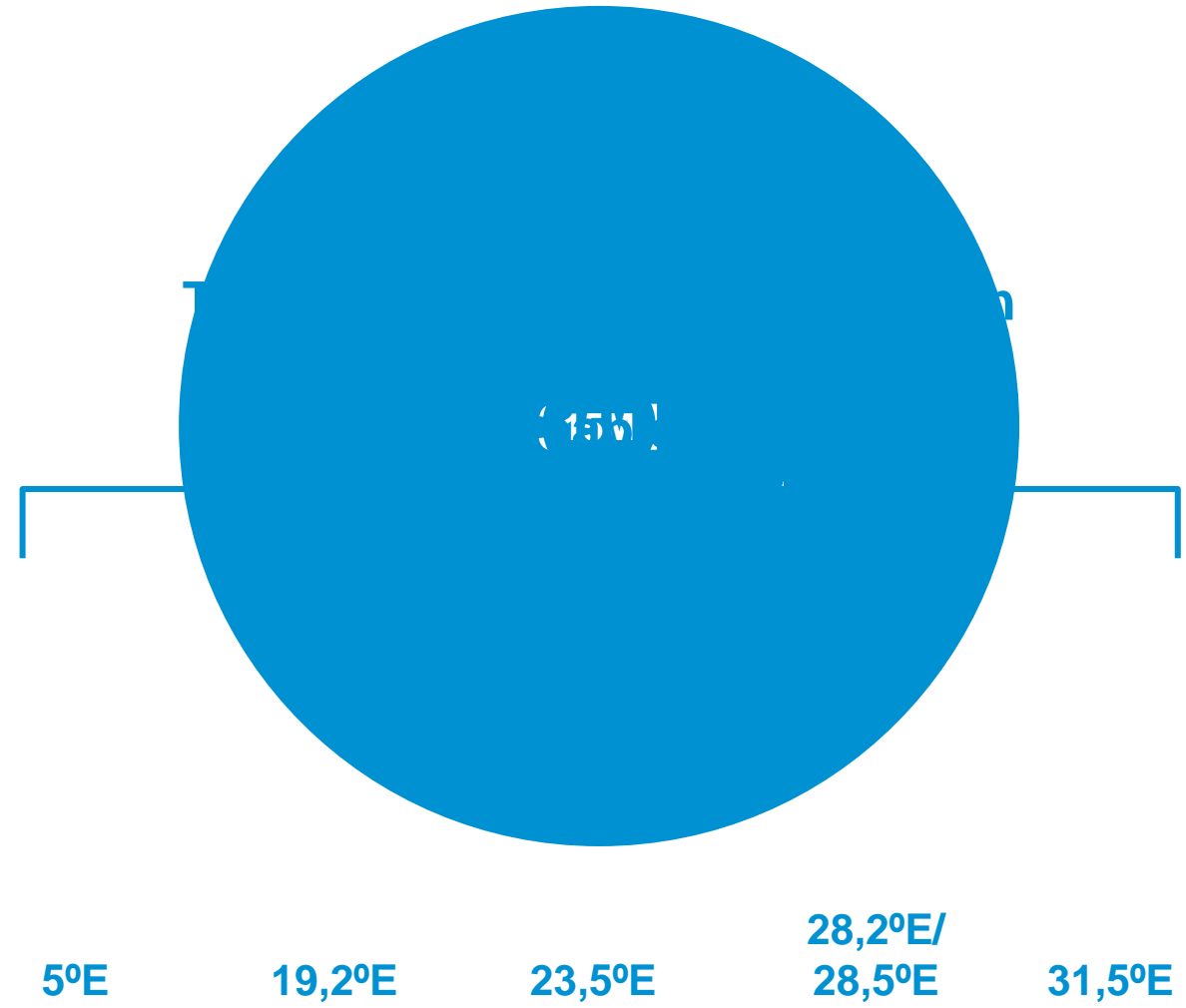
**CABLE**

**SATÉLITE**

\* 15 out of 37 countries updated on YE'15  
Source: Satellite Monitor YE'15



# Alcance SES en Europa por posición orbital



\* 15 out of 37 countries updated on YE'15  
Source: Satellite Monitor YE'15

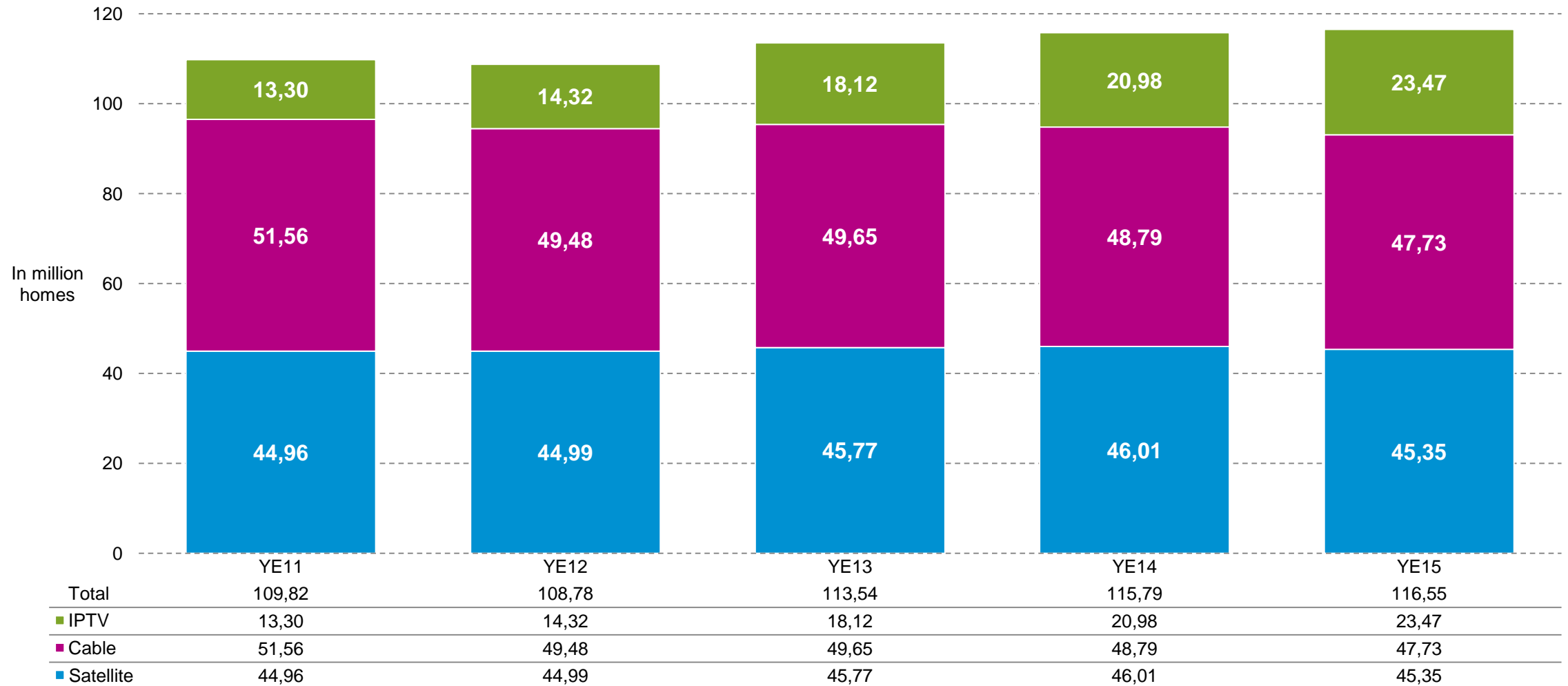
## La posición orbital 19,2°E en Europa

- ▲ Los satélites SES en 19,2°E sirven a **117 millones** de hogares vía satélite, cable, e IPTV
- ▲ Más de **45 million** de hogares de TV vía satélite reciben su contenido de TV de 19,2°E, la mitad de todos los hogares de TV vía satélite en Europa
- ▲ Además, la gran mayoría de hogares de TV por cable (**71%**) e IPTV (**76%**) son servidos indirectamente por 19,2°E



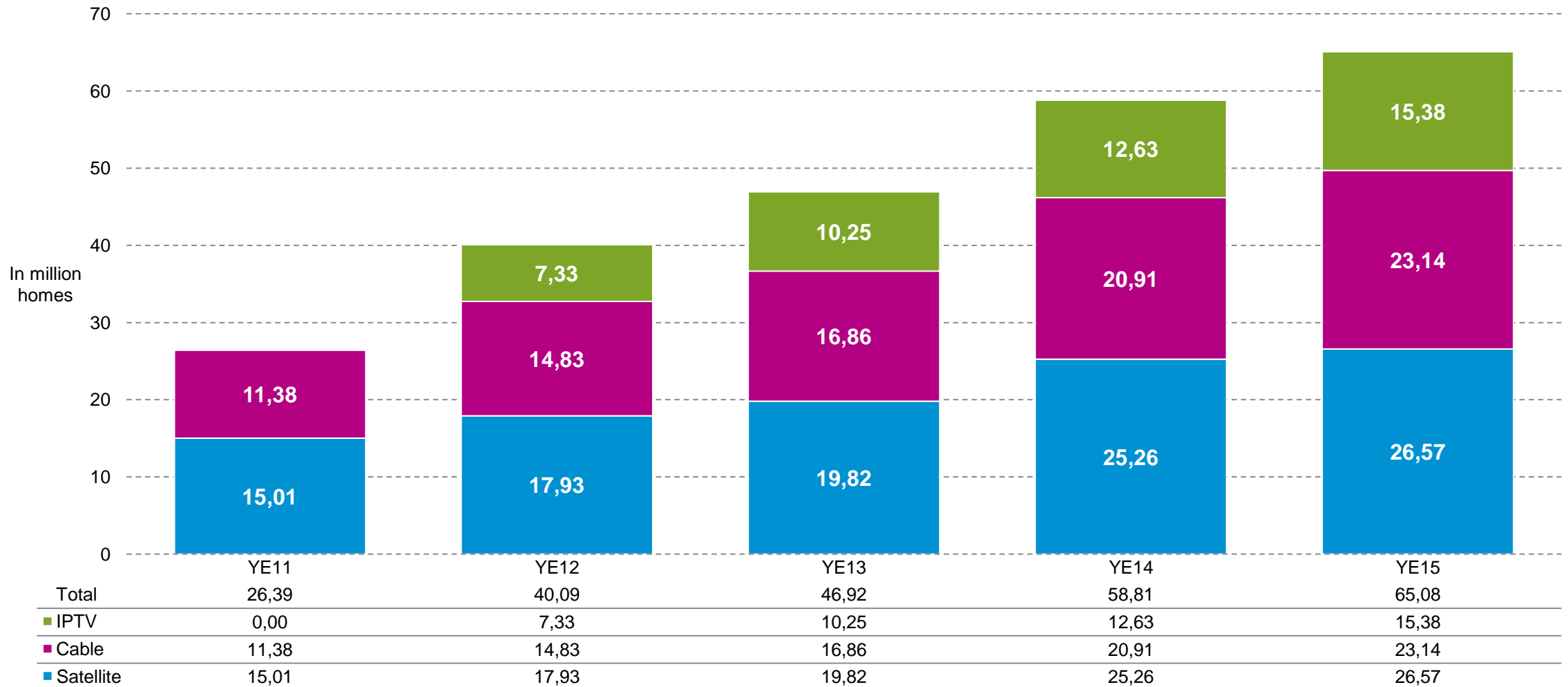
\* 15 out of 37 countries updated on YE'15  
Source: Satellite Monitor YE'15

# La cobertura de la posición orbital 19,2°E en Europa



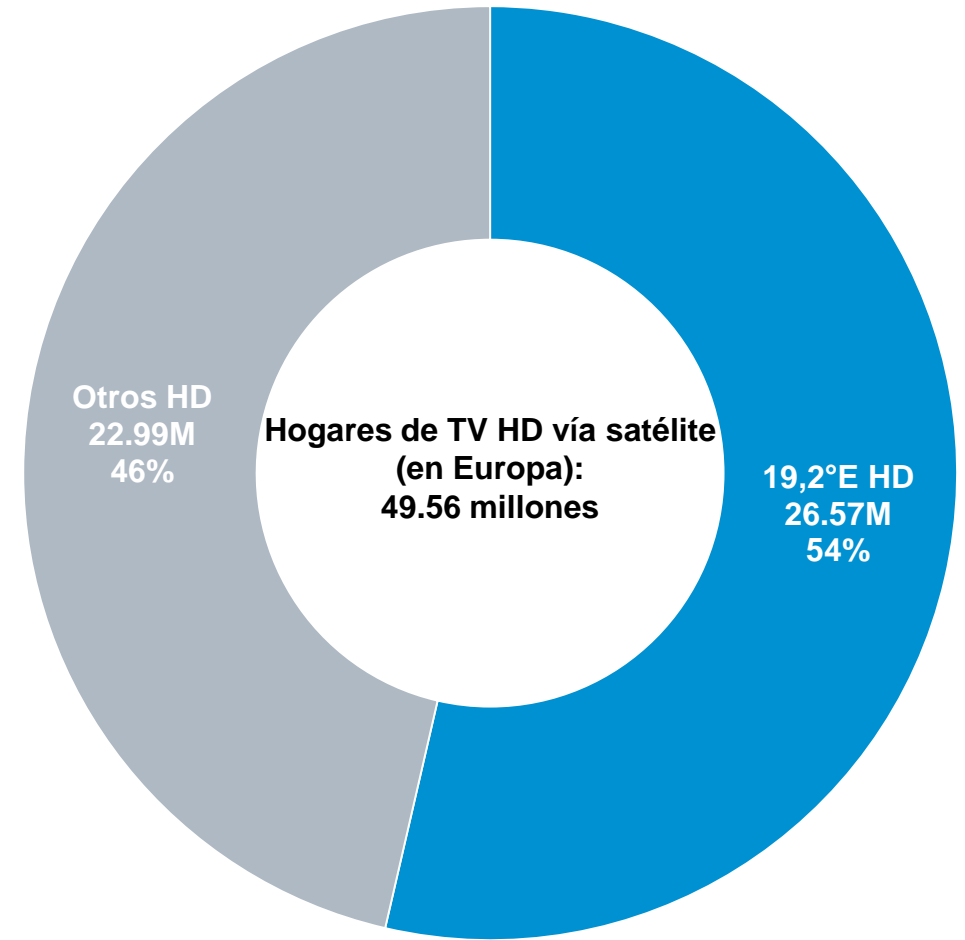
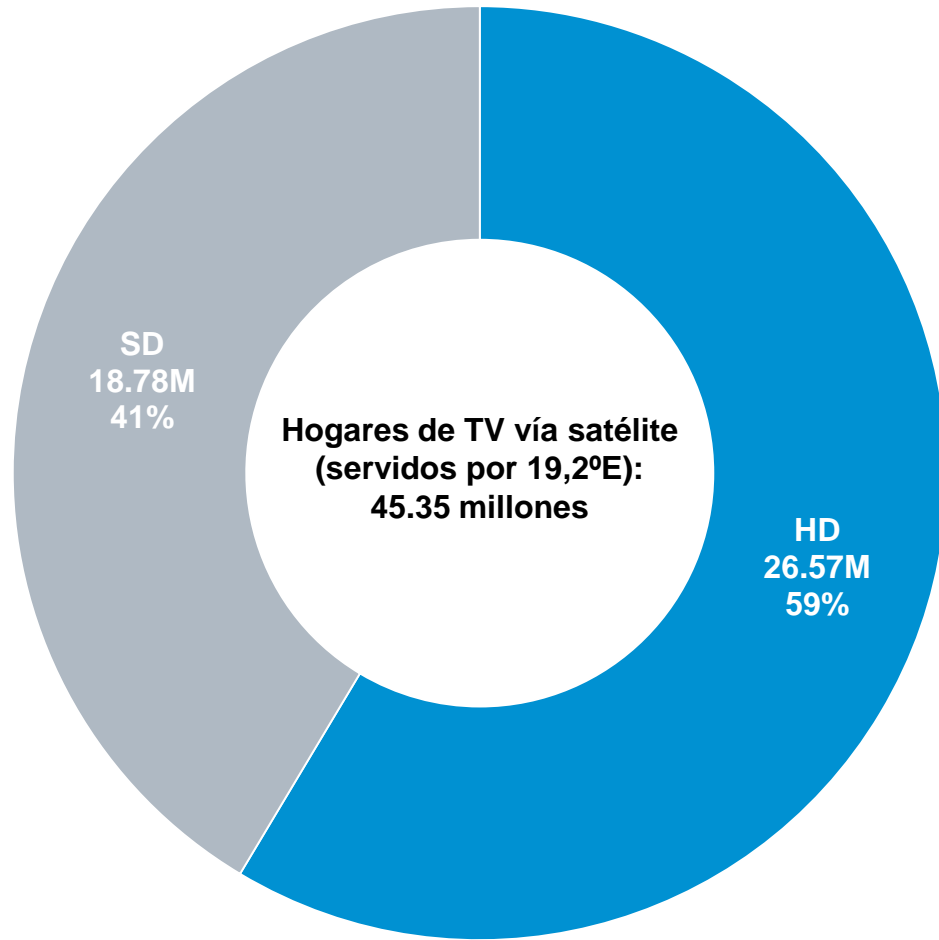
\* 15 out of 37 countries updated on YE'15  
 Source: Satellite Monitor YE'15

# La posición orbital 19,2°E para la HD en Europa



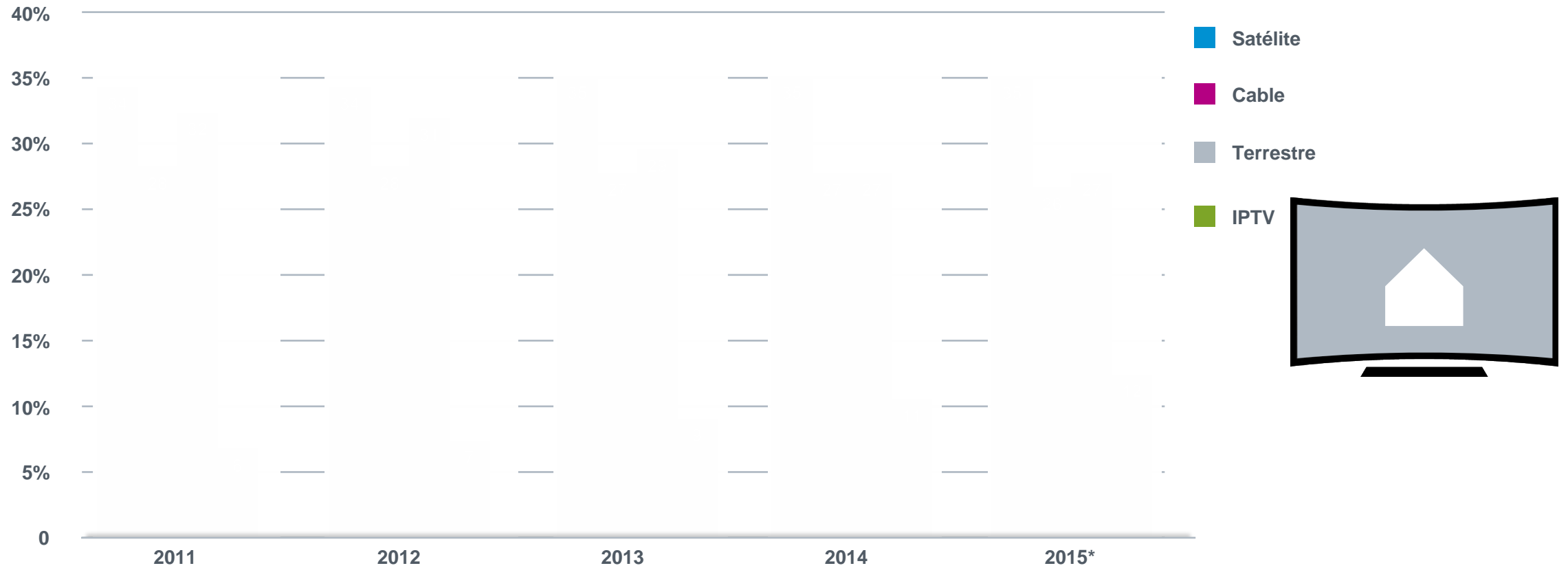
\* 15 out of 37 countries updated on YE'15  
 Source: Satellite Monitor YE'15

# La posición orbital 19,2°E para la HD en Europa



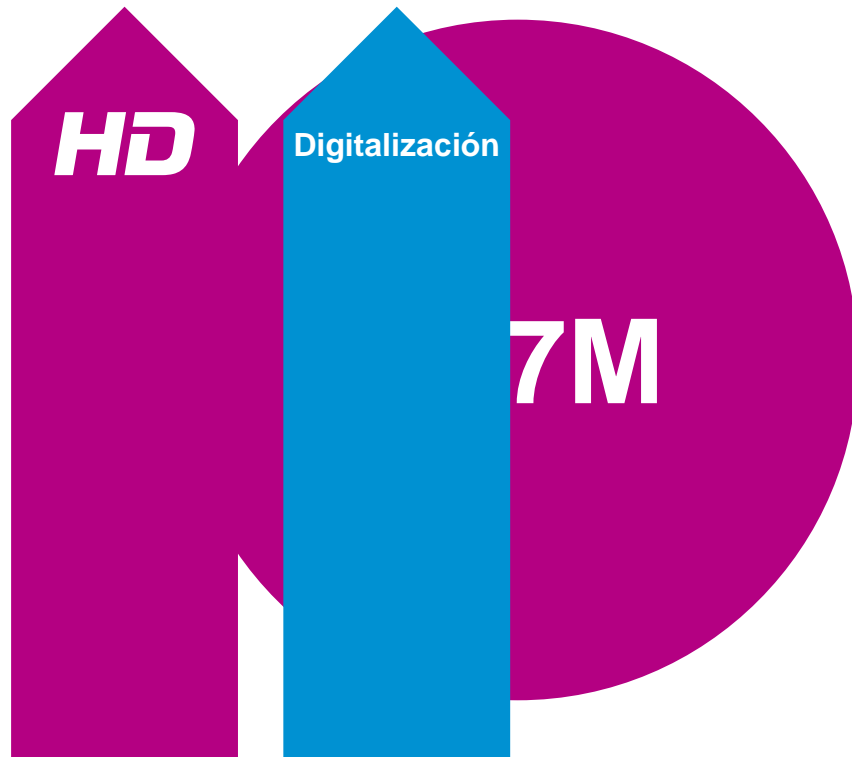
\* 15 out of 37 countries updated on YE'15  
Source: Satellite Monitor YE'15

# El satélite continúa siendo el modo de recepción de TV líder en Europa

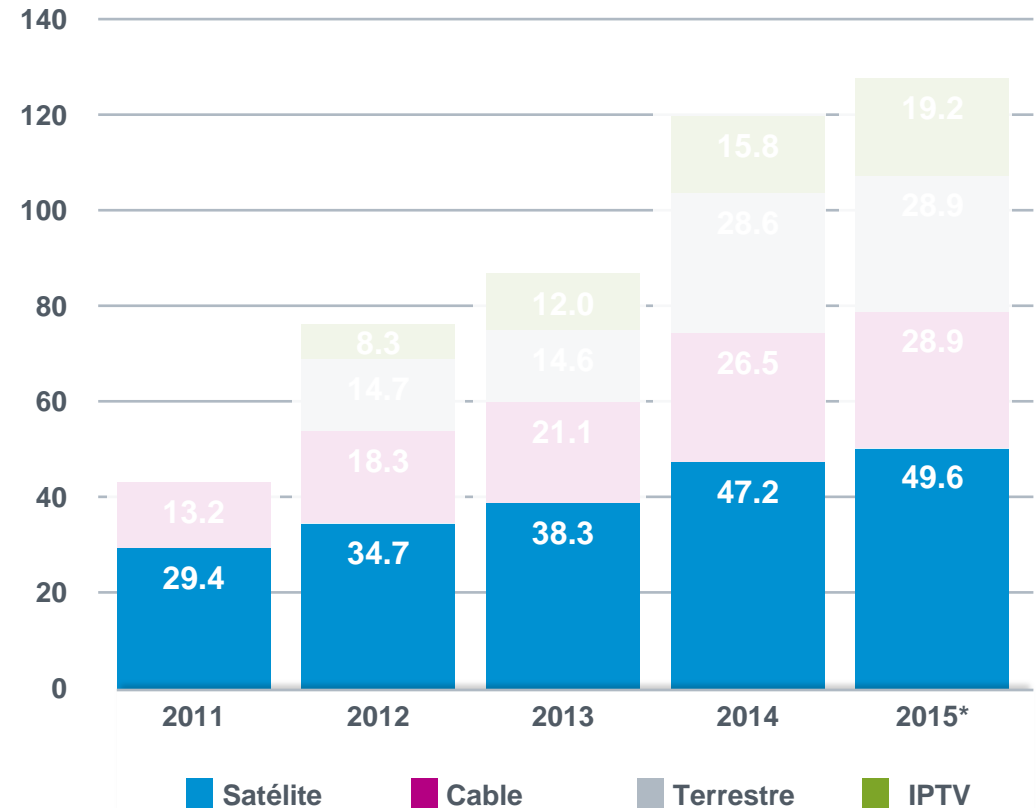


\* 15 out of 37 countries updated on YE'15  
 Source: Satellite Monitor YE'15

# La TV HD se ha triplicado en cinco años en Europa



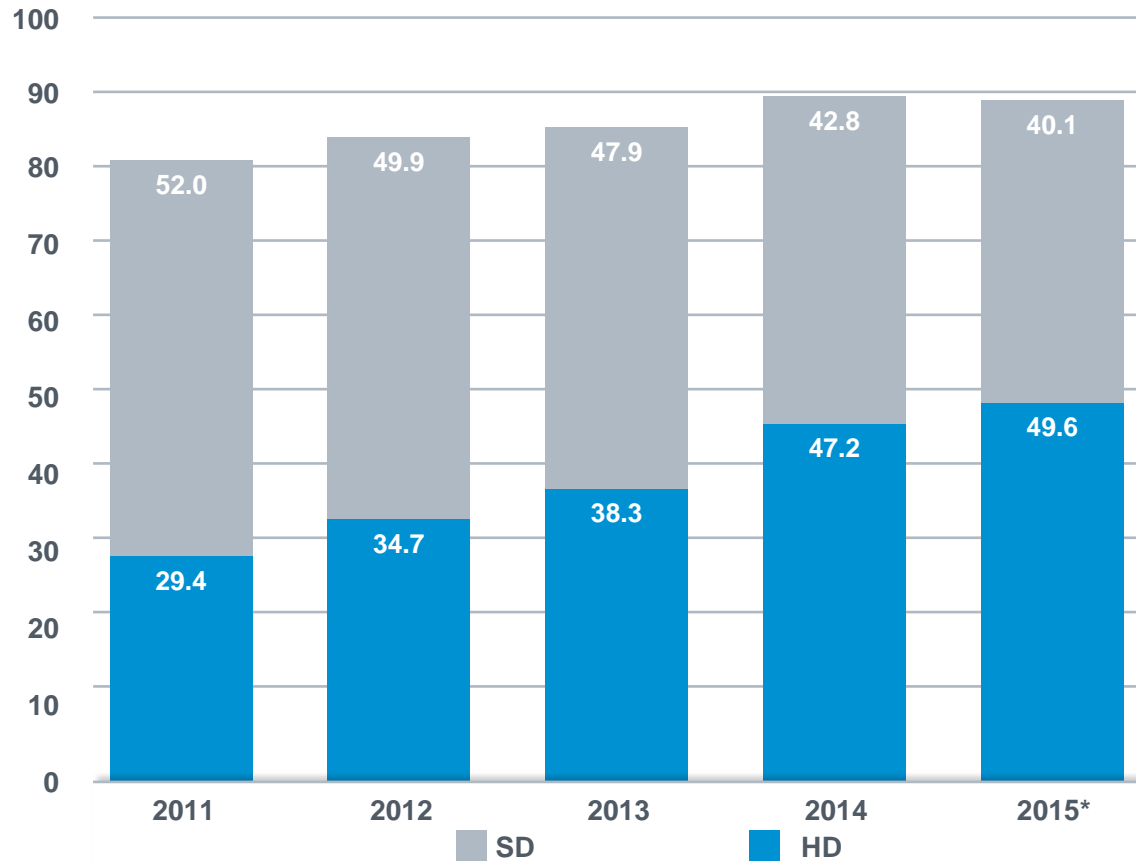
En millones de hogares



\* 15 out of 37 countries updated on YE'15  
Source: Satellite Monitor YE'15

# La TV HD vía satélite continúa creciendo en Europa

Hogares (millones)



50M



\* 15 out of 37 countries updated on YE'15  
 Source: Satellite Monitor YE'15



# SES en la TV HD vía satélite en Europa

## Fin 2015\*



# 78%

de los hogares Europeos de TV HD vía Satélite reciben sus canales de TV de SES



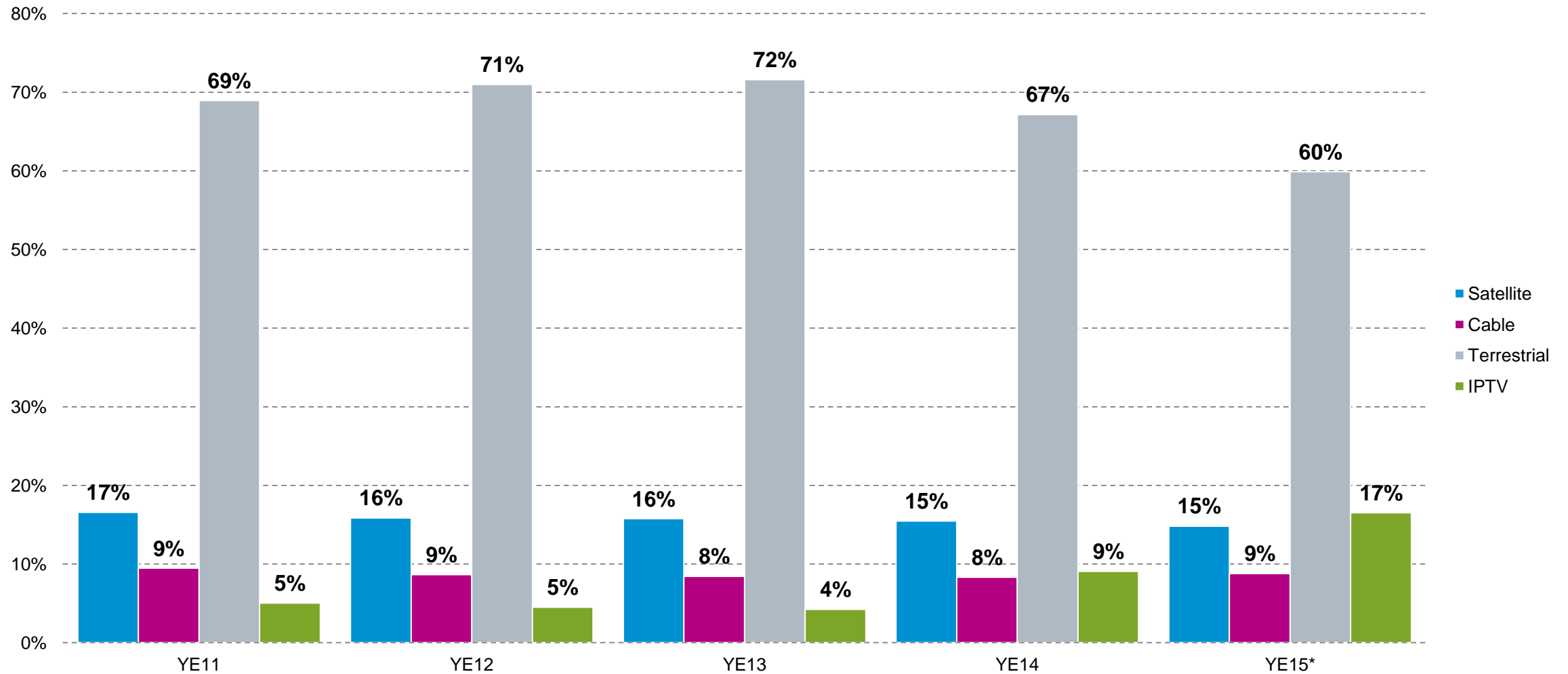
\* 15 out of 37 countries updated on YE'15  
Source: Satellite Monitor YE'15

A wide-angle, high-angle photograph of a city at night, likely Madrid, Spain. The scene is dominated by a dense urban landscape with numerous buildings, many of which are illuminated from within. In the foreground, a large, ornate building with a classical facade is brightly lit, and a busy street with many cars is visible. To the right, there are festive light displays, including a large, illuminated Christmas tree. The sky is dark, and the overall atmosphere is vibrant and festive. A large, semi-transparent graphic element, consisting of overlapping pink and blue shapes, is positioned on the left side of the image, partially obscuring the cityscape.

# El mercado de la TV en España

Fin 2015

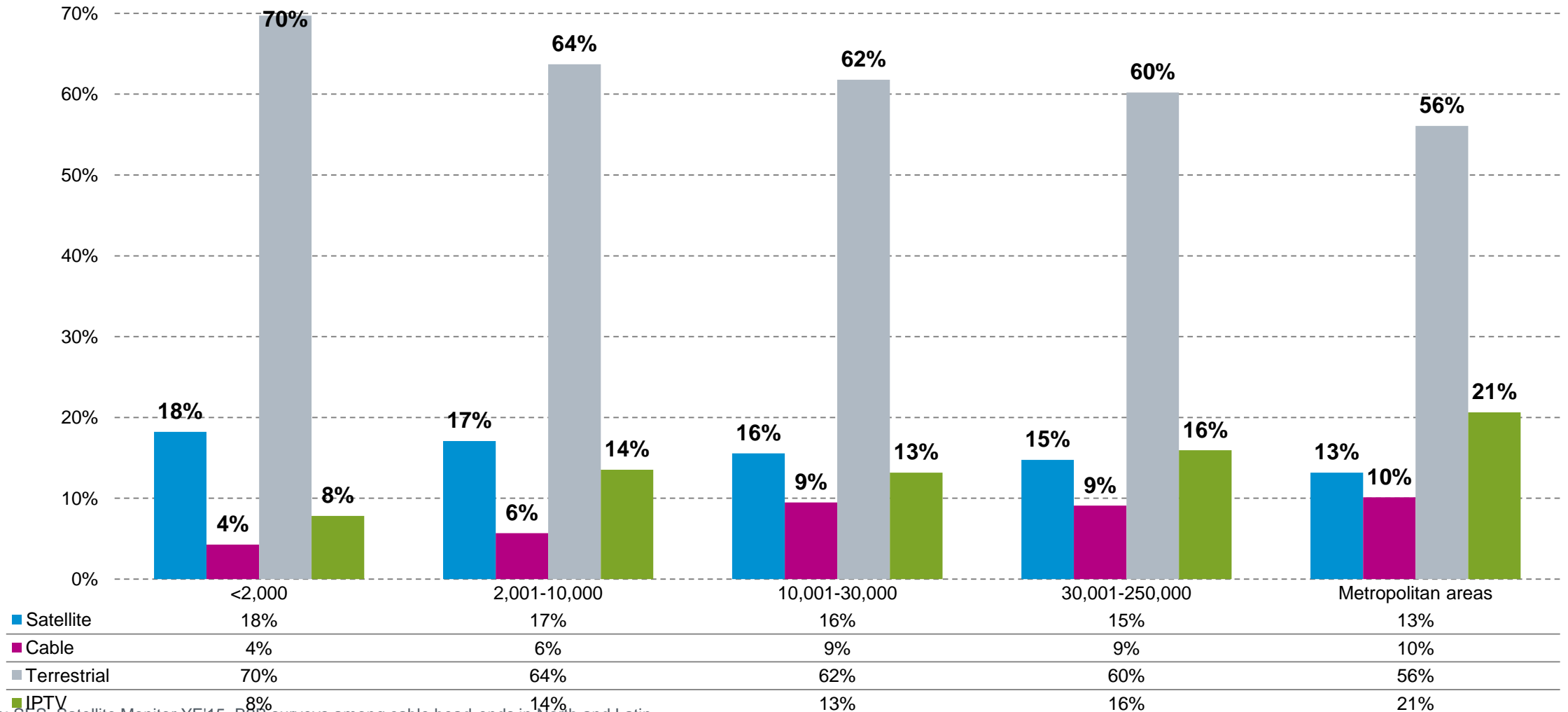
# La TV por satélite permanece estable



Source: SES, Satellite Monitor YE'15, 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

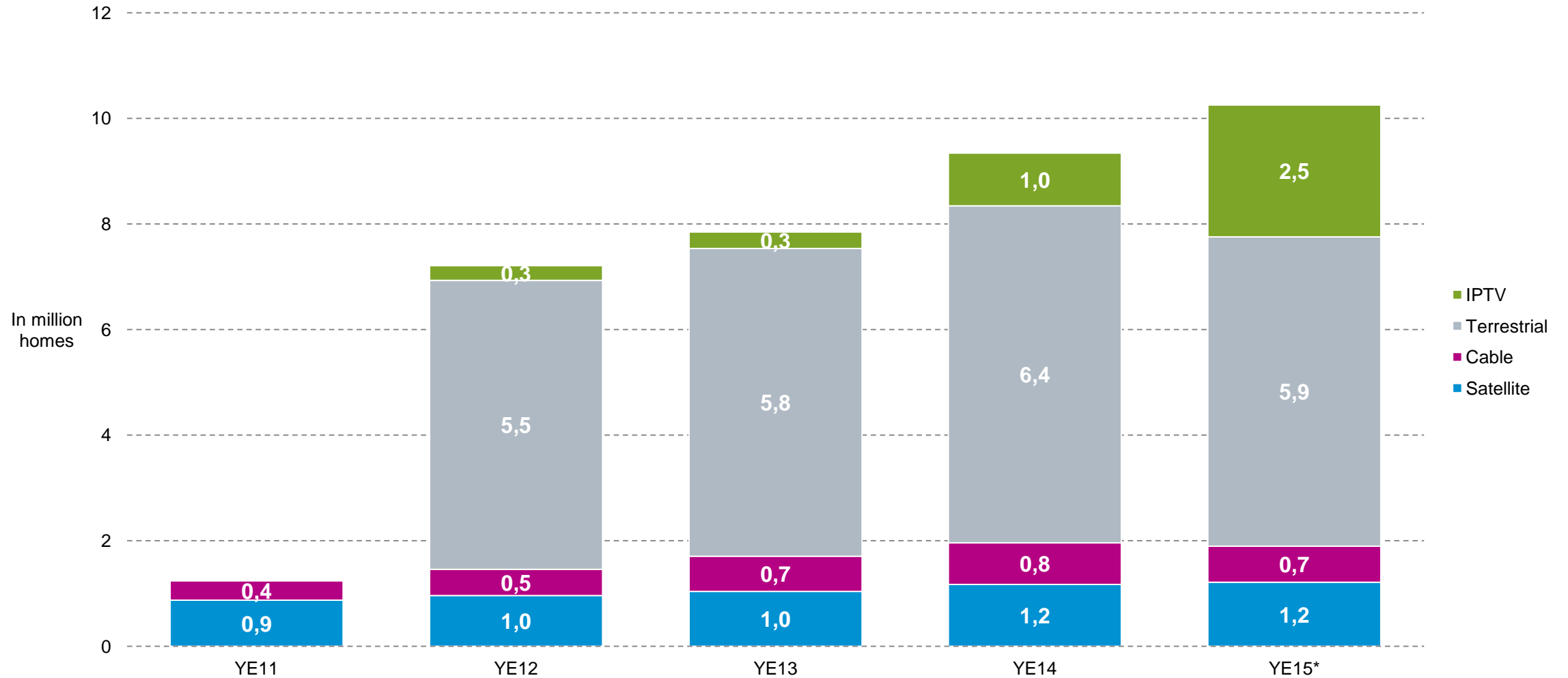
# Modos de recepción de TV por tamaño de población



Source: SES, Satellite Monitor YE'15, B2B surveys among cable head-ends in North and Latin America, Pay-TV operators' figures, SES analyses & estimates

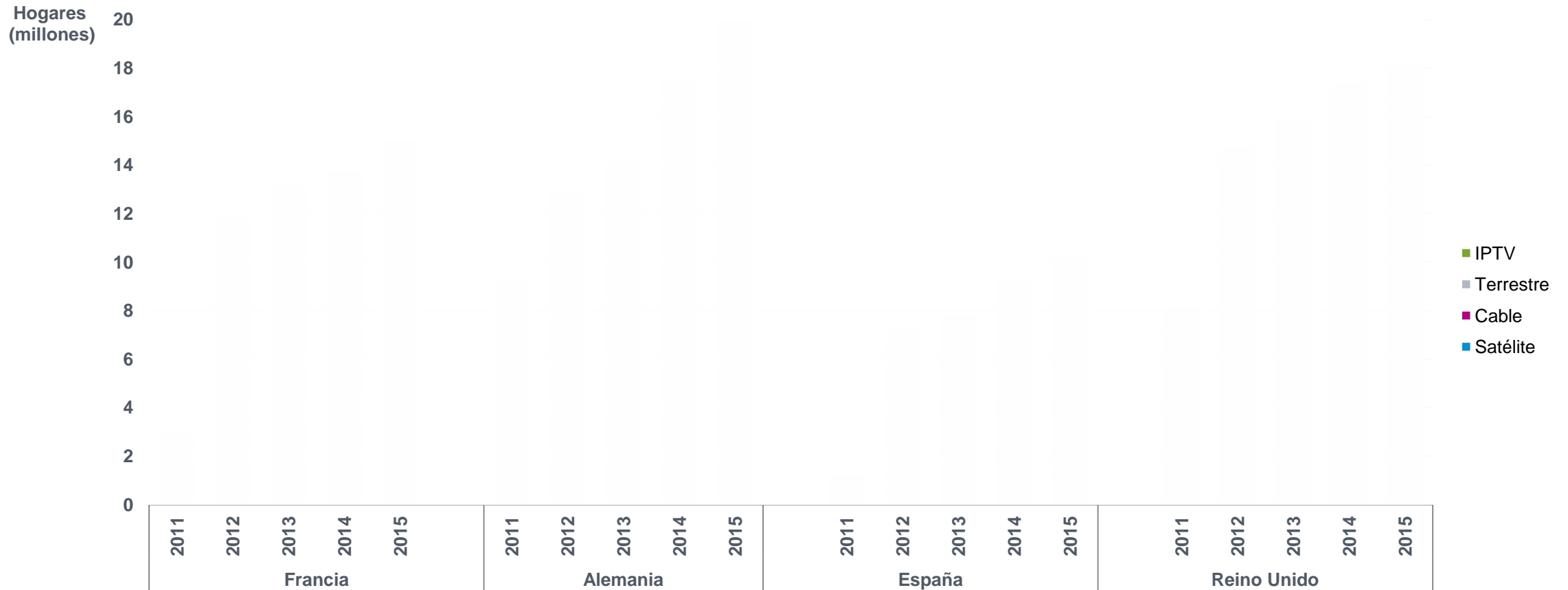
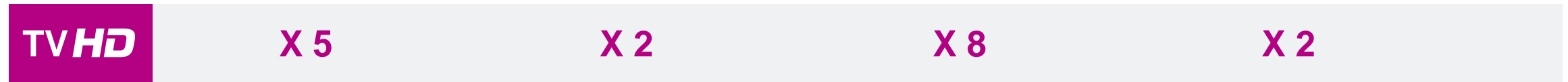
Note: SES reach includes subscribers reached via Ciel-2's spot beams

# La HD en España

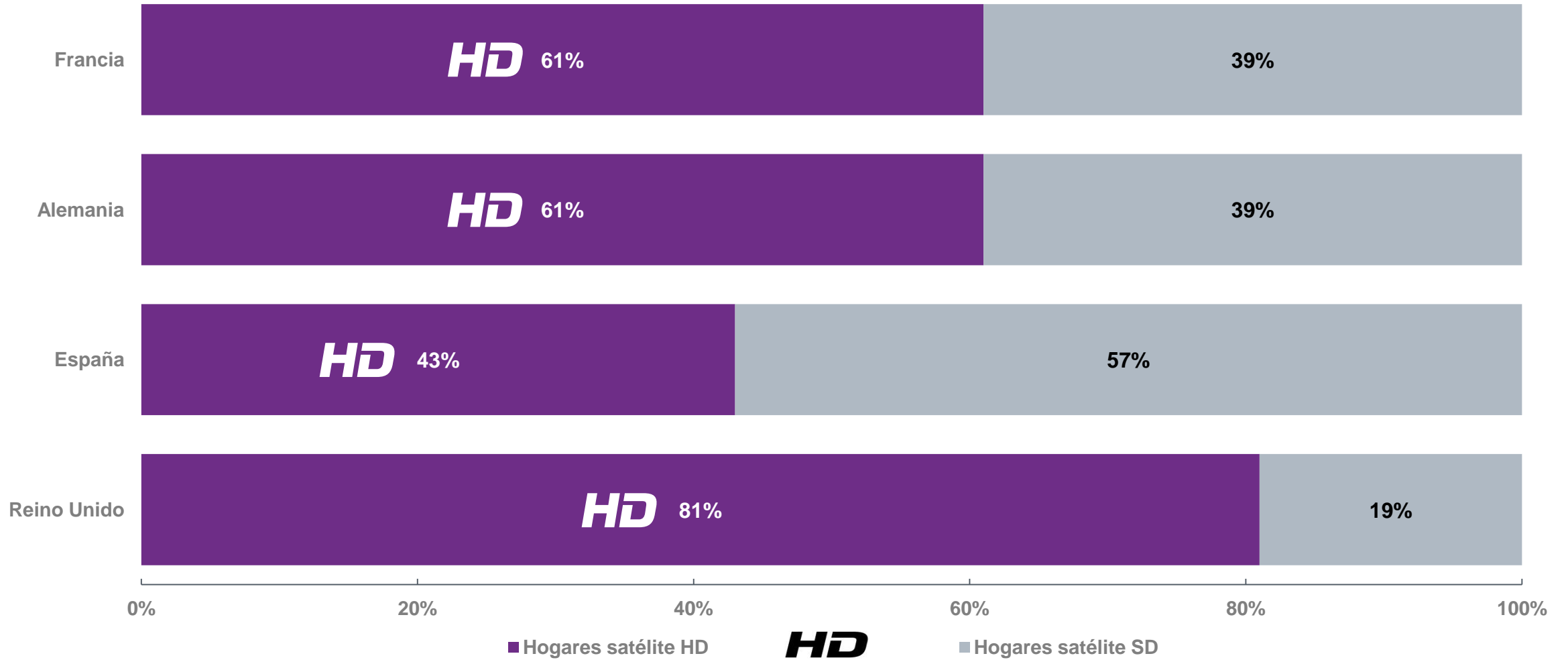


Source: Satellite Monitor YE'15, DYM Market Research

# Recepción de la TV HD en los mercados clave de Europa



# Penetración de la HD (en % del número total de hogares de TV vía satélite)



Source : Satellite

# Cuota de mercado de SES entre los hogares de TV HD vía satélite (en % del número total de hogares de TV vía satélite)

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Source :

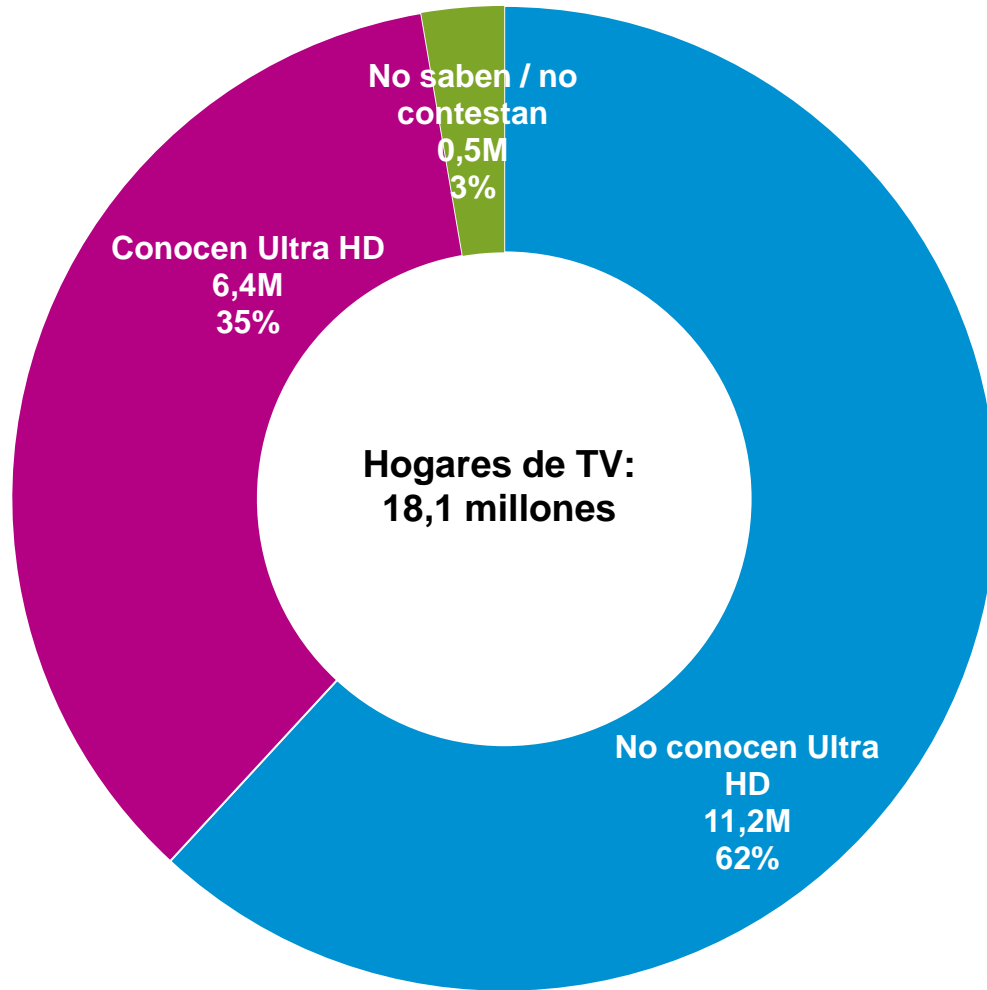


A close-up photograph of a dandelion seed head against a clear blue sky. The seeds are coated with numerous clear water droplets of various sizes. The background is a soft-focus bokeh of light and blue. A diagonal purple-to-pink gradient bar is on the left side of the image.

# Estado actual de la Ultra HD

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# Ultra HD / 4K en España



**35%**

de todos los hogares españoles de TV **conocen** el Ultra HD

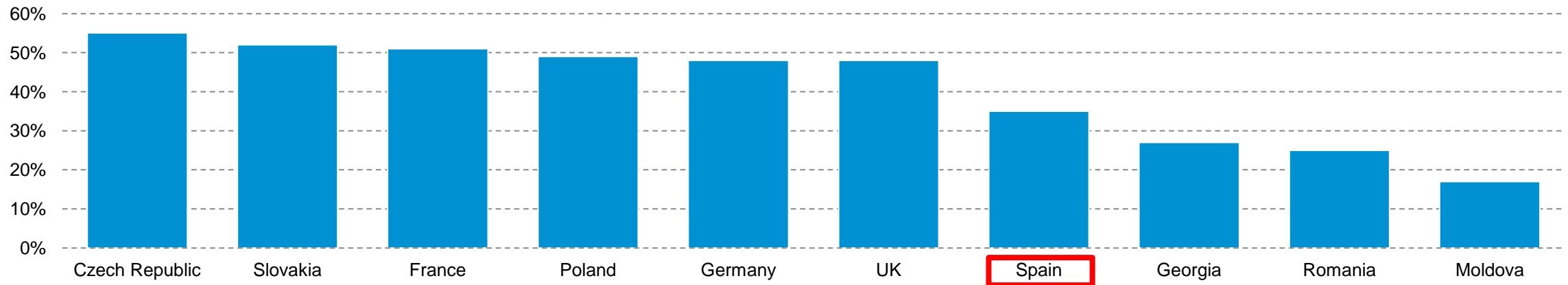
**6%**

de todos los hogares españoles de TV **poseen** una TV Ultra HD

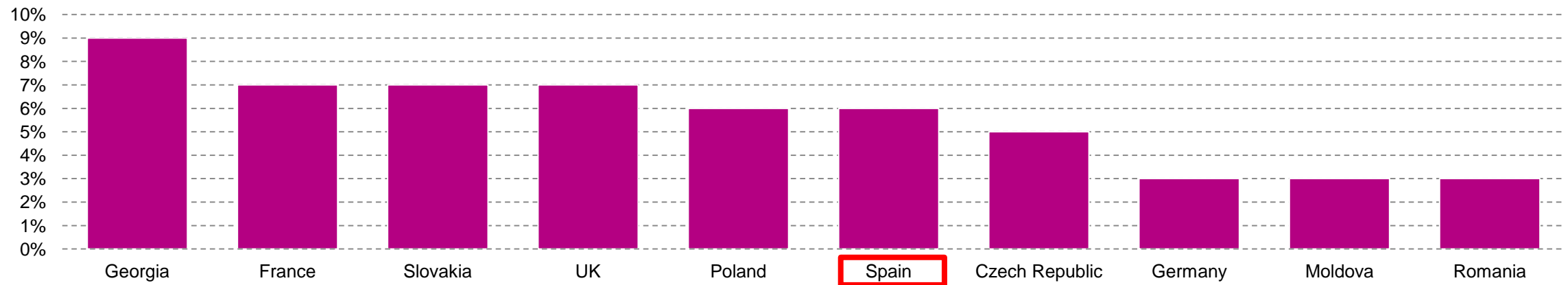
Source: Satellite Monitor YE'15, DYM Market Research

# Ultra HD / 4K en Europa

## ▲ Conocimiento de la Ultra HD:

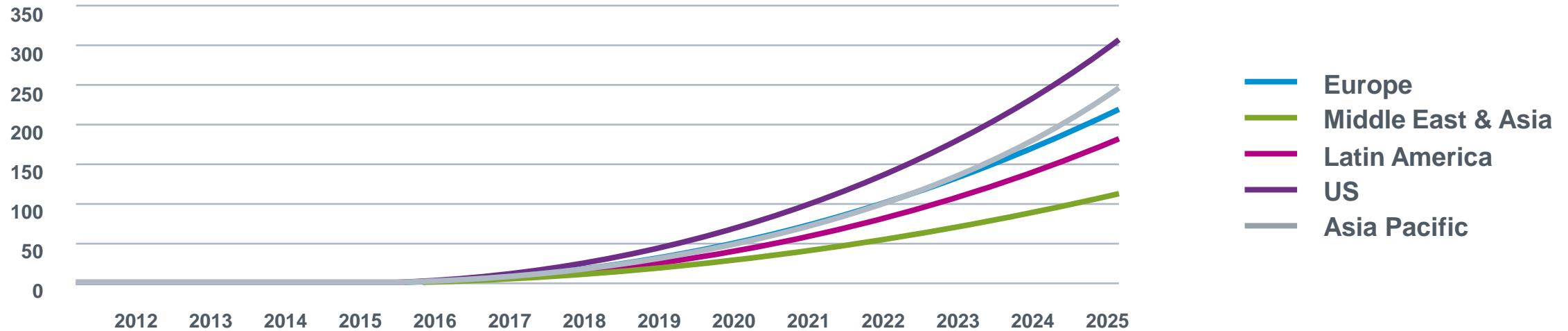


## ▲ Posesión de una TV Ultra HD:



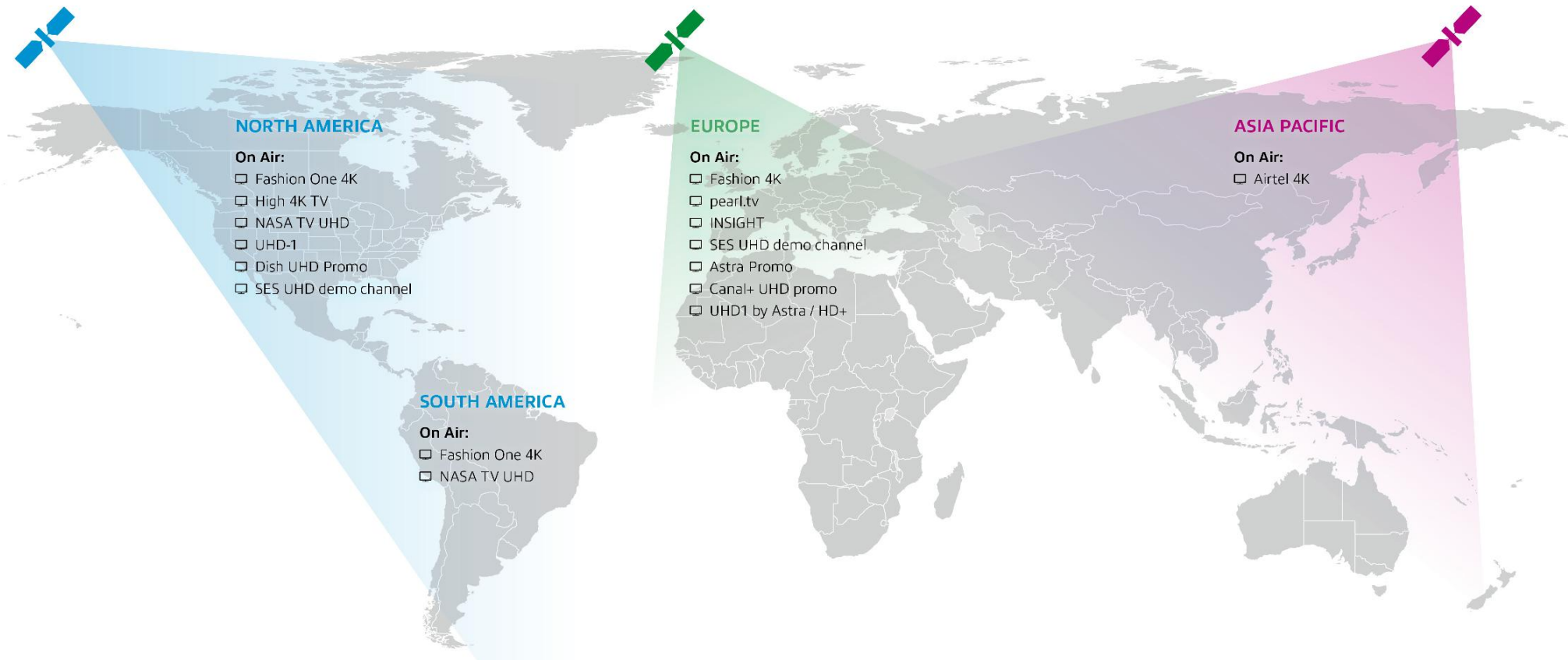
Source: Satellite Monitor YE'15, DYM Market Research

## Predicción de la disponibilidad de contenido Ultra HD



- ▲ Over 1 400 movies and shows are available in Ultra HD by end of 2015
- ▲ Satellite is the most widely adopted mode to distribute Ultra HD content due to its technical performance and reliability
- ▲ More Ultra HD Blu-Ray discs due to Ultra HD Blu-Ray specifications published earlier this year. Spring 2016 in Europe
- ▲ More than 750 Ultra HD channels expected by 2024

# Canales Ultra HD vía satélites SES



- ▲ North America, Europe, and Asia markets are first to broadcast Ultra HD channels
- ▲ Adoption of Ultra HD in the different regions is dependent on the maturity of the TV markets, available infrastructure, and TV offerings

## Access to research and country specific data

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- ▲ For more information about the research and country specific data, visit the SES Extranet at: <https://extranet.ses.com/satellite-monitor>
- ▲ If you do not have access, please sign up on: <https://extranet.ses.com>

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