

Press Release

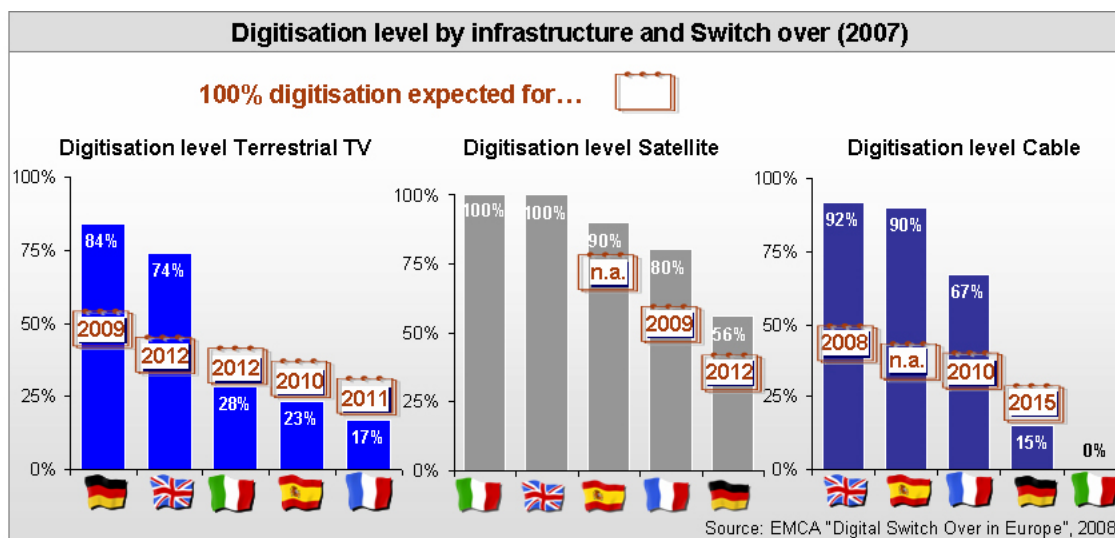
**TV infrastructures in Europe: 4 more years until digital switch over in key markets**

*The first joint report of the European Media Consulting Association (EMCA)*

Berlin, London, Madrid, Paris, Rome, 23. April 2008. Digital switch over still drives the media agenda in many European countries and the pace of digitisation is very different in each key market. In the UK 86% of all households already watch digital TV (2007)<sup>1</sup> while other European Countries still have a long way to go. In France, Italy, Spain and Germany digitisation progresses slowly - where between 40 and 47 per cent of all TV households use digital receivers (2007). The European Media Consulting Association (EMCA), recently founded as an international strategy consortium for TIME-Markets, has just published the study "Digital Switch Over in Europe - Status Quo and Outlook". The first publication of EMCA looks at the current situation in Europe with the transition into the world of digital television.

The digitisation of TV households across Europe is gathering momentum. However, the development of the diverse broadcasting in the key European TV markets differs significantly.

Table 1 Digitisation level by infrastructure and switch over



Terrestrial TV still plays a dominant role in Spain and Italy: more than 75 percent of all TV sets receive TV programs via terrestrial transmission. Terrestrial TV is also the most important infrastructure in France and the UK. With a market share of less than 10 per cent, terrestrial TV is of much lesser importance in Germany where cable and satellite have almost replaced terrestrial TV. Due to the small number of terrestrial TV households the transmission to digital terrestrial TV proceeded smoothly and a complete switch off is expected in 2009.

The digitisation of Cable TV also shows a very different status in each country: In the UK and Spain today more than nine out of ten cable households receive digital

<sup>1</sup> Source: OFCOM & Digital UK Switchover Survey, Q3, 2007

TV. In Germany more than 80 per cent of cable households are still analogue due to missing incentives to switch over. In Germany, cable is the most widely distributed infrastructure. It plays a much less important role in UK, France and Spain. In Italy cable TV is almost non-existent.

Satellite is the platform with the highest digitisation level of all traditional TV infrastructures. Satellite transmission is digital in Italy and the UK. It is also very widely spread in France (with 80 per cent, 2007) and Spain (with 90 per cent, 2007) while Germany (with 56 per cent, 2007) falls behind the other countries.

France is the leading IPTV nation in Europe with a market share of 5 per cent (2007). IPTV has also achieved a significant market share in Italy and Spain while it is still in its infancy in Germany and the UK.

A complete switch over to digital transmission in the European key markets will not be achieved in the short term. EMCA believes that it will take at least another four years before all the operators of TV broadcasting infrastructures in France, Spain Germany, Italy, Spain and the UK stop analogue distribution and give way to a greater spectrum of digital programs and services.

The European Media Consulting Association (*EMCA*) is an international strategy consortium for media, entertainment and telecommunications. EMCA currently has member companies in Germany (*GOLDMEDIA*), France (*NPA Conseil*), the UK (*3Vision*), Italy (*ITMedia Consulting*) and Spain (*Asset Media Consulting*). The EMCA platform provides an exchange of data, experience and competence in methodology offering a full service consultancy in a global TIME market.

### Editors' Notes to the new EMCA report "Digital Switch Over in Europe"

The report *Digital Switch Over in Europe: Status Quo and Outlook*, published by EMCA in April 2008, contains detailed appraisals of the state of the European switch over process. The study provides a profound analysis of the European digital market in 5 Western European markets: France, Germany, Italy, Spain and the UK. Each country profile includes the following aspects: digitisation regulation and responsible authorities and executions; digitisation process and status quo of the different TV-infrastructures satellite, terrestrial and cable, success factors of digitisation and forecasts as well as benchmarking figures. [www.emca.tv](http://www.emca.tv)

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### EMCA Profile

The European Media Consulting Association, *EMCA*, was founded as an international strategy consortium for media, entertainment and telecommunications. EMCA currently has member companies in Germany, France, the UK, Italy and Spain. EMCA's goal is to establish an international platform for strategy consulting using a systematic exchange of data, analyses, experience and method competence in the area of TIME markets. As an international consulting group the EMCA has highly specialised knowledge and aggregated expertise for regional and national markets and can guarantee analyses and consulting with global orientation. EMCA members are leading consulting companies from different European countries with long-standing expertise in the areas of new and digital media, telecommunications and entertainment. Current members are: *3Vision* from the UK, *Asset Media Consulting* from Spain, *GOLDMEDIA* from Germany, *ITMedia Consulting* from Italy and *NPA Conseil* from France.