

Since launching in 2008, Freesat has built a highly valued platform

3.6m Freesat products sold since launch.

1.8m Homes.

3.6m Individuals

87% of Freesat customers would recommend it to a friend*

56% of consumers are aware of Freesat*

PLATFORM SATISFACTION*

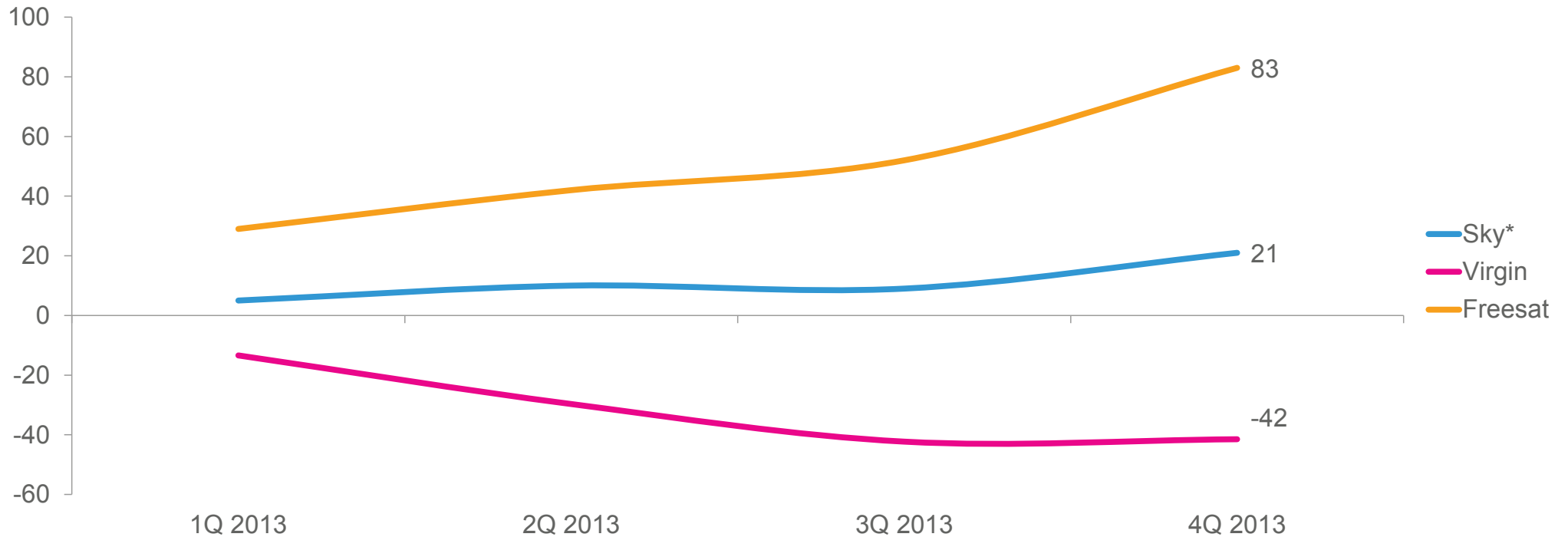
	86%
	81%
	81%
	78%
	66%

Strong Competition



In 2013 Freesat outperformed both Sky and Virgin Media despite their significantly larger marketing budgets

Cumulative net TV adds (homes 000s), 1Q13 – 4Q13



*DTH only (Freesat estimate)
Source: Sky, Virgin Media, Freesat⁶



Five myths about British TV ‘these days’

1. Everyone has some form of pay-TV service these days

13 million or 49% of UK homes still rely on Free To Air services (BARB/3 Reasons/Company reports, July 13)

2. No-one watches linear TV anymore

Non-live linear viewing share is only 8% in DTT homes (Enders Analysis, June 13)

3. Linear TV viewing is largely through catch-up TV

The UK watches linear TV live 89% of the time down only 1pp year-on-year (Thinkbox, Feb 14)

4. Viewing figures on PSB channels are falling

‘PSB Family’ viewing share has remained constant at 73% since 2010 (Enders Analysis, June 13)

5. Over-the-top (OTT) TV will replace linear broadcast TV

Less than 1% of total viewing hours is via platforms outside of DTT, DST or cable (Ofcom, August 13)