



THE MARKET

DStv is South Africa's leading pay TV operator with almost 4 million subscribers. The brand is a product of MultiChoice and offers digital satellite television to subscribers in South Africa and across the African continent. In South Africa the six DStv bouquets cater for diverse tastes and pockets ranging from DStv Premium to DStv Lite.

DStv's vision is to provide their subscribers with a world of top class entertainment across multiple platforms and also to ensure that subscribers with niche preferences are accommodated. Commercial customers at hotels, shebeens and taverns can select from a number of tailored packages.

MultiChoice reported an annual turnover of 21,1 billion rand for the last financial year.

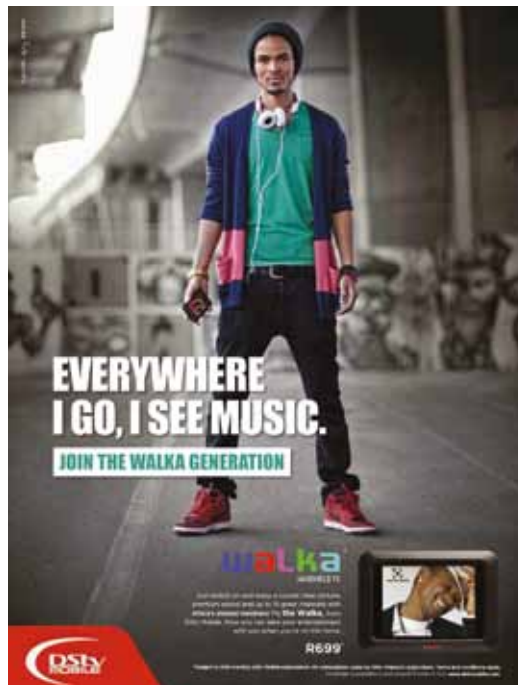
DStv sees itself as a proudly South African brand that targets a broad cross-section of consumers using a combination of marketing tools including advertising, promotions and events to raise awareness of a range of products that meets their varying entertainment needs.

As an iconic brand DStv intends to continue living up to its promise of surrounding their subscribers with entertainment across multiple platforms by concentrating on bringing innovative services using the latest technology to subscribers and adding as much value to their offerings as possible.

ACHIEVEMENTS

DStv is well known as an innovative brand and has scooped a sheaf of awards, the latest being:

- Named leader in the entertainment sector at the Orange Index Awards 2010 and achieved fourth place overall
- Retained its top position in the entertainment sector at the Orange Index Awards 2011 achieving seventh place overall
- DStv Compact subscribers reached the one million mark in 2011



- The brand won a number of Loerie and PromaxBDA awards for its advertising. One of its latest TV commercials "making memories" has recently won a PromaxBDA gold
- DStv remains a coveted brand in the "generation next" space consistently appearing on the Sunday Times Generation Next Brand Survey Awards' list

DStv is committed to delivering on its promise of "so much more" by launching new channels and bouquets and giving its subscribers access to world-class technology and innovation. These are some of the "firsts" that the brand is extremely proud of:

- In 2002 DStv pioneered interactive television.
- In 2003 DStv introduced dual view decoders.

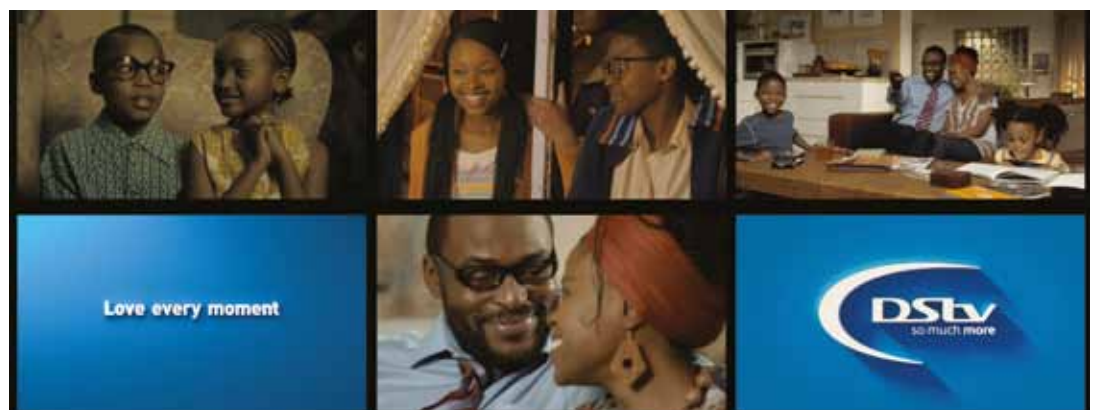
- DStv's first PVR was launched in 2005 forever changing how people watch and interact with their televisions
 - Three years later DStv launched the first HD or high-definition PVR
 - In 2010 DStv launched its On Demand service
 - That same year DStv Mobile was introduced and in the last two years DStv Mobile's product range has grown to include the Drifta, Drifta USB and Walka.
 - In 2011 DStv launched BoxOffice changing the way in which subscribers with PVRs can hire and enjoy DVDs
 - 1 June 2012 The iDrifta, compatible with Apple appliances, was released
- All of DStv's decoders are ISO compliant.

HISTORY

MultiChoice launched the DStv brand and platform in 1995 and South African consumers were exposed to the best of the world's entertainment in their own homes for the first time. Acting on the experience of its sister company, pay TV channel M-Net, DStv's first offering boasted 11 international channels, 4 sports channels and 39 audio channels. As South Africa's first satellite pay TV provider the brand soon captured the imagination of the local market and has continued to build on that success ever since.

Over the years the brand has grown from strength to strength. Their subscribers' appetite for content has increased consistently over the past 17 years driving growth from the original 11 channels to the over 90 currently available; including HD channels and other value added offerings.

2012 sees a new chapter in the DStv story with the successful launch of Intelsat 20. As the most powerful satellite in the Intelsat fleet, all of MultiChoice's existing services will be migrated to the IS-20. The IS-20 has also been built to serve and be operational for 24 years



which is a record period. Its deployment brings a much needed capacity boost for MultiChoice which has been running low on available satellite bandwidth.

THE PRODUCT

DStv is designed to inspire, delight, entertain and inform its subscribers through multiple platforms which offer subscribers over 90 video channels and 6 high definition channels. Subscribers can access DStv either from their televisions, from their computers or from their mobile phones. By prioritising innovation and drawing on the latest world-class technology, DStv offers so much more entertainment anywhere, any time.

The various bouquets vary from the top of the range DStv Premium which offers 98 channels for a monthly rate of 559 rand, DStv Compact with over 50 video channels and 32 radio channels to DStv EasyView for 20 rand monthly for 15 channels. DStv Indian and DStv Portuguesa cater for a previously overlooked section of subscribers and are available as a stand-alone selection or in conjunction with DStv Premium, Compact or Select.

DStv Mobile and Mobile Drifta are Free for DStv Premium Subscribers with a range of 12 channels or are available at a monthly rate of 36 rand.

RECENT DEVELOPMENTS

Due to the increased capacity of the new satellite DStv subscribers can expect a better alignment of the service to more closely resemble the operations and services of satellite pay TV operators in comparable countries and markets such as Australia and Britain.

At the subscriber's end in terms of consumer interface a new "channel shuffle" or regrouping and realignment of TV channels available on DStv should take place to create new "space" and wider number blocks before new channels and simulcast high definition channels are added.

Over the past two years the brand has introduced a number of innovative services to subscribers namely: DStv BoxOffice; DStv On Demand and DStv Mobile including the Drifta and the Walka.

Their latest device is the new DStv Mobile iDrifta: a plug and play mobile DVB-H receiver/portable decoder specifically designed for Apple appliances. It is a classic example of DStv seeing a need in the market, researching world-wide

trends and responding to this with a local innovation that draws on the latest technology available.

DStv recently opened a renovated point of sale store at the Maonya Mall in Gauteng. The brand has several outlets for subscribers to interact with the brand namely MultiChoice branches, DStv agencies, a call centre and social media platforms.

PROMOTION

Creatively capturing the essence of DStv's promise of "so much more" remains a priority in all marketing activities. DStv uses a range of different media to reach both subscribers and potential subscribers. Print media, broadcast media, television adverts and promotions at key events.

All of DStv's activations and brand promotions focus on creating brand affinity and increasing positive brand awareness and maintaining brand relevance to a broad range of South Africans.

DStv builds many of its promotions around major national and international events. The most recent examples include the Rugby World Cup, Euro 2012 and the 2012 Olympics.

DStv's "making memories" television advert has been particularly successful and remains a firm favourite among subscribers. The ad captures the essence of our brand promise and recently received a gold award at the PromaxBDA International Awards.

BRAND VALUES

DStv strives to provide value, choice, quality and breadth through continued innovation. The brand brings its promise of "so much more" to life through top quality entertainment packaged in competitive bouquet offerings and delivered via world-class technology.

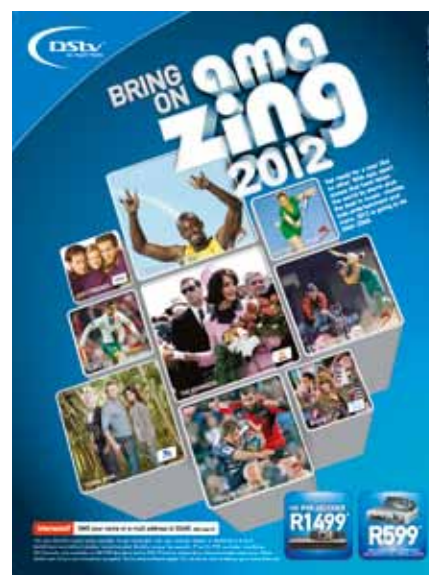
The brand is committed to delivering top quality entertainment to homes and other devices through leading edge technology and a continuous commitment to quality. Extensive quality control processes throughout the value chain ensure that the needs of their subscribers are met. A number of outlets where the brand can interact directly with subscribers form another



leg of the quality control process. This enables DStv to remain responsive to subscribers and ensure a great entertainment experience.

As a trusted brand, corporate social responsibility remains a DStv priority thus ensuring the long term sustainability of the projects and initiatives that they are involved in to the benefit of the community.

DStv is well known for and committed to continued innovation with a focus on delivering more value to their subscribers.



THINGS YOU DIDN'T KNOW ABOUT DSTV

- DStv offers 40 DMX 24 hour a day audio music channels as part of all of its bouquets
- DStv was the second satellite platform to be launched worldwide
- DStv's footprint extends across Africa serving 48 countries throughout the continent
- DStv's Dish is South Africa's most read monthly magazine
- DStv operates four satellites on the African continent namely: IS7, W7 and IS10 and recently the IS-20

