

The Global TV Deck

The global proof of TV's power and popularity



The Global TV Deck initiative

In 2013, *The Global TV Group* was created with major players in the TV industry joining forces to consistently back up TV's positive narrative with solid global data as well as promote the power of TV as a digitally transformed medium.

In the madness of the digital storm, and when TV advertising's power is taken for granted more than ever, *The Global TV Group* launched the Global TV deck initiative to:

- Remind advertisers, journalists, tech gurus, agencies and industry peers about the power and popularity of TV
- Gather solid facts and figures worldwide to have an accessible source of reliable information
- Prove that TV and online are more powerful together

What we define as TV



TV is brand-safe

Among the most serious concerns in our industry, brand safety has been a major red flag for video advertising.

While it is important to address this issue it is also important to assess once more that TV has never and will never be faced with such a controversy.

All TV is whitelisted:

- 100% transparency
- Highest rate of viewers' trust
- Regulations
- Measurement

A great topic to illustrate TV as the safest space for advertising and highlight its strengths, effectiveness and bright future.



TV is the prime real estate of AV advertising



High completion rates



Robust measurement



Full Screen



Brand safe



Sound on



Shared viewing









Viewed by humans



High quality programming

The global proof of TV's power and popularity

-  **Reach**
Unbeatable scale and reach
-  **Resilience**
TV viewing is steady throughout a decade of innovation and different stages of life
-  **Popularity**
TV has by far the biggest share of attention
-  **Impact**
TV is the most trusted and impactful form of advertising
-  **Effectiveness**
Advertisers invest in TV advertising because it pays back
-  **Complementarity**
TV makes all other media more effective

Reach

Unbeatable scale and reach

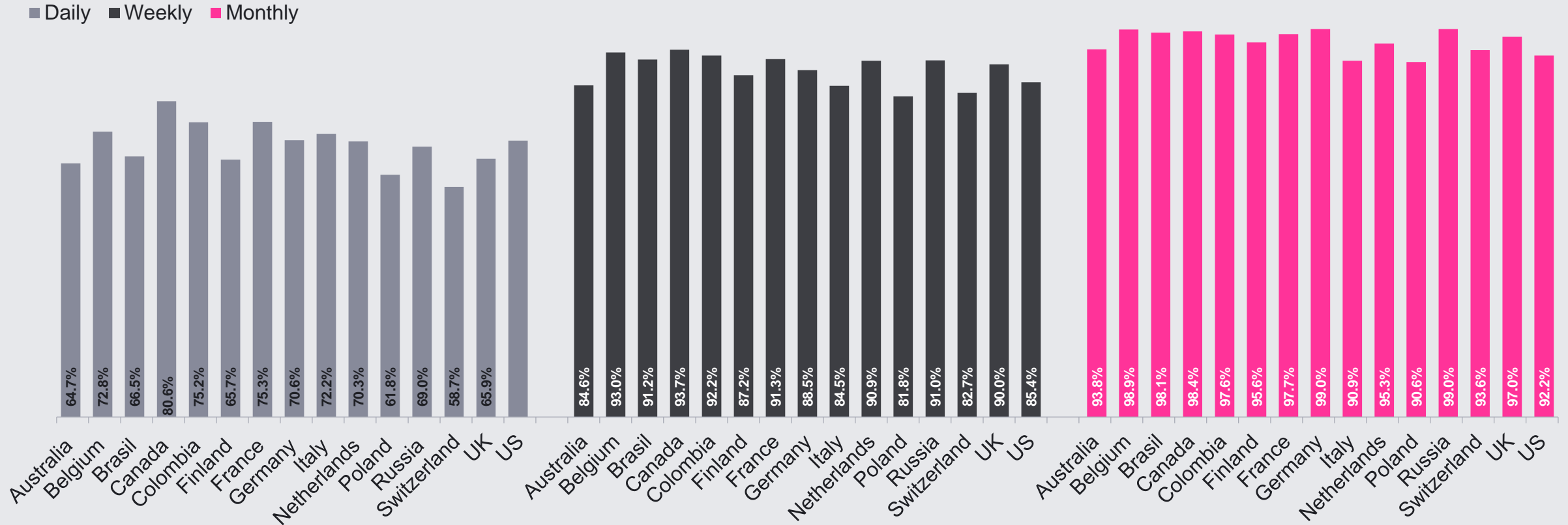


“TV is still really powerful for us. It is still the **most mass reaching audience** and it still works for us”

Marisa Thalberg, CMO of Taco Bell

April 2017

Incomparable reach all over the world



TV is the fast track to reach consumers

Average viewing time in Europe and overseas

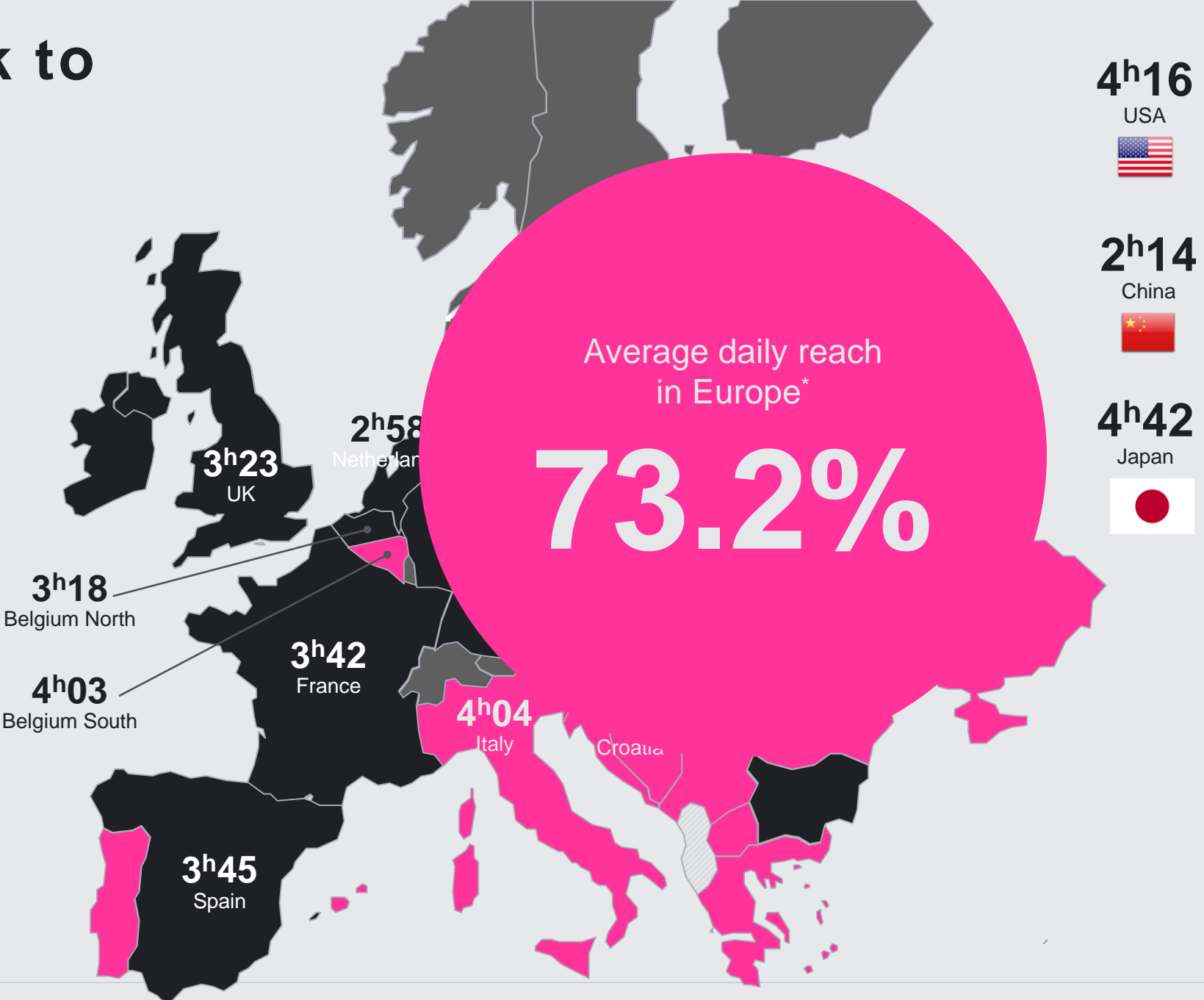
- more than 4 hours
- 3-4 hours
- 2-3 hours

Daily Viewing Time

4h07

+39 min

vs 1996



Source average viewing time: *RTL AdConnects own calculations. Source: TV Key Facts 2018, Médiamétrie, Eurodata TV worldwide, all individuals, all day, January-December 2017
Source average daily reach : European Daily TV reach excluding Greece, Norway, Portugal and Slovenia, Development of daily TV reach in % of all adults 12+, 13+, 14+ etc. | Source: TV Key Facts 2018, Médiamétrie, local institutes

Unbeatable daily, weekly and monthly reach

% of the Australian population



64.7%



84.6%



93.8%

Unbeatable daily, weekly and monthly reach

% of the Austrian population



65.3%



90.5%



98.1%

Unbeatable daily, weekly and monthly reach

% of the North Belgian population



74.5%



93.7%



99.0%

Unbeatable daily, weekly and monthly reach

% of the South Belgian population



71.4%



93.1%



99.2%

Unbeatable daily, weekly and monthly reach

% of the Brazilian population



66.5%



91.2%



98.1%

Unbeatable daily, weekly and monthly reach

% of the Canadian population



80.6%



93.7%



98.4%

Unbeatable daily, weekly and monthly reach

% of the Colombian population



75.2%



92.2%



97.6%

Unbeatable daily, weekly and monthly reach

% of the Czech population



70.2%



89.1%



95.5%

Unbeatable daily, weekly and monthly reach

% of the Ecuadorian population



54.1%



81.9%



94.2%

Unbeatable daily, weekly and monthly reach

% of the Finnish population



65.7%



87.2%



95.6%

Unbeatable daily, weekly and monthly reach

% of the French population



75.3%



91.3%



97.7%

Unbeatable daily, weekly and monthly reach

% of the German population



70.6%



88.5%



99.0%

Unbeatable daily, weekly and monthly reach

% of the Irish population



65.6%



89.0%



96.3%

Unbeatable daily, weekly and monthly reach

% of the Italian population



72.2%



84.5%



90.9%

Unbeatable daily, weekly and monthly reach

% of the Mexican population



58.2%



88.5%



97.1%

Unbeatable daily, weekly and monthly reach

% of the Dutch population



70.3%



90.9%



95.3%

Unbeatable daily, weekly and monthly reach

% of the Peruvian population



43.9%



73.9%



90.4%

Unbeatable daily, weekly and monthly reach

% of the Polish population



61.8%



81.8%



90.6%

Unbeatable daily, weekly and monthly reach

% of the Russian population



69.0%



91.0%



99.0%

Unbeatable daily, weekly and monthly reach

% of the Slovenian population



74.7%



91.3%



95.7%

Unbeatable daily, weekly and monthly reach

% of the Korean population



59.6%



80.3%



93.2%

Unbeatable daily, weekly and monthly reach

% of the Spanish population



70.2%



89.1%



96.1%

Unbeatable daily, weekly and monthly reach

% of the Swedish population



59.3%



82.0%



92.7%

Unbeatable daily, weekly and monthly reach

% of the Swiss population



58.7%



82.7%



93.6%

Unbeatable daily, weekly and monthly reach

% of the British population



65.9%



90.0%



97.0%

Unbeatable daily, weekly and monthly reach

% of the Ukrainian population



69.8%



91.6%



97.7%

Unbeatable daily, weekly and monthly reach

% of the American population



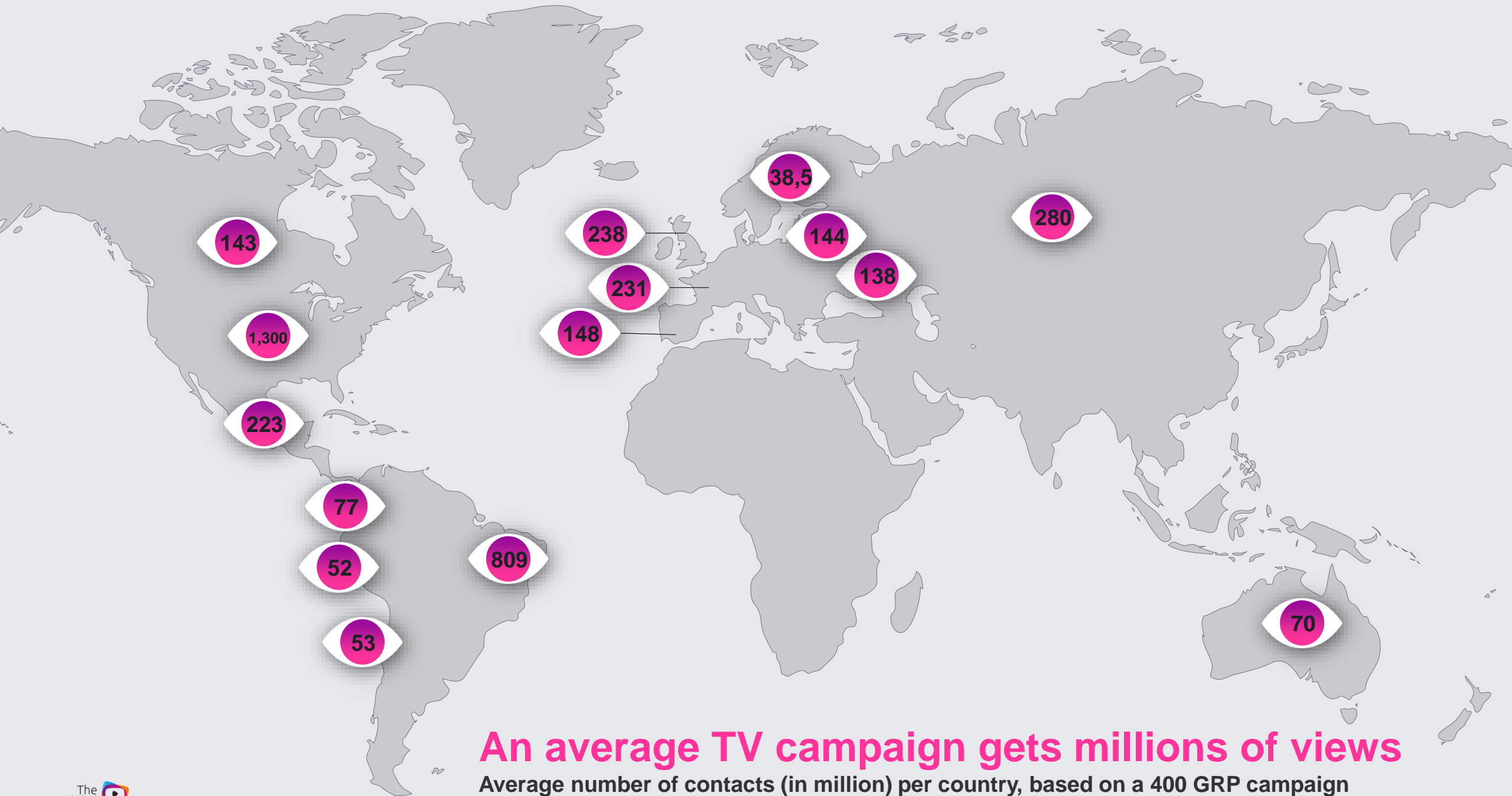
70.5%



85.4%



92.2%



An average TV campaign gets millions of views

Average number of contacts (in million) per country, based on a 400 GRP campaign

An average broadcast
TV campaign in
Australia
gets:



Million views



An average broadcast
TV campaign in
Austria
gets:



Million views

Base: 400 GRP . Source: AGTT/GfK: TELETEST, 2017, people 12+



An average broadcast
TV campaign in
North Belgium
gets:



Million views



An average broadcast
TV campaign in
South Belgium
gets:



Million views



An average
broadcast TV campaign
in **Brazil**
gets:



Million views

Base: 400 GRP. Source: Kantar Ibope Media – MW Telereport – Metropolitan Regions – May of 2018. Viewers from Atlas Globo Universe: 202.420.696. © Figure: 809.682.784



An average
broadcast TV campaign
in **Canada**
gets:

143

Million views

Base: 400 GRP, Ind 2+. Source: Based on 2017-18 Numeris' population estimates



An average
broadcast TV campaign
in **Chile**
gets:



Million views

*Base: 400 GRP. Source: Kantar Ibope Media, June 2017. TV Data Population 4+: 13,381,914
Actual Figure: 53,527,656*



An average
broadcast TV campaign
in **Colombia**
gets:



Million views



An average
broadcast TV campaign
in **Czech Republic**
gets:



Million views



An average broadcast
TV campaign in
Ecuador
gets:



Million views

Base: 400 GRP. Source: Kantar Ibope Ecuador. January to November, 2017. Total Population 3+: 4,850,550. Real Data: 19,402,200



An average
broadcast TV campaign
in **Finland**
gets:



Million views

*Base: 400 GRP. Source: Dagmar Media. Gross contacts 21 996 000: All population 4+
Target group size: 5 249 000. 3 weeks (weeks 38-40/2018)*



An average
broadcast TV campaign
in **France**
gets:



Million views



An average
broadcast TV campaign
in **Ireland**
gets:



Million views

*Figures based on an average campaign of 400 TVRs (individuals) using the 2018 TV universe
Source: TAM Ireland*



An average
broadcast TV campaign
in **Italy**
gets:



Million views



An average
broadcast TV campaign
in **Mexico**
gets:



Million views

Base: 400 TGRPS. Source: Nielsen IBOPE Mexico. P4+, 12nd to 25th June 2017 – Total Nacional.
(Free TV + Cable)



An average
broadcast TV campaign
in the **Netherlands**
gets:



Million views



An average
broadcast TV campaign
in **Peru**
gets:



Million views

Base: 404.2 GRP%. Source: TV Data 8.0 (Kantar Ibope Media) June of 2017. Target: Total (Lima + 6 cities) Population 13,040,400. Actual Figure: 52,709,296



An average
broadcast TV campaign
in **Poland**
gets:

144

Million views

Base: 400 GRP. Source: Nielsen Audience Measurement Poland, 2018, All individuals 4+.



An average
broadcast TV campaign
in **Russia**
gets:

280

Million views

Base: 400 GRP. Source: MediaScope, 4+, period April 2018, 100+ (MediaScope Universe, cities with a population of 100 thousands of people and more), NSK LLC



An average
broadcast TV campaign
in **Slovenia**
gets:



Million views

Base: 400 GRP. Source: AGB Nielsen, Total individuals. Q1 2018. Actual figure: 7,552,659



An average
broadcast TV campaign
in **Spain** gets:

148

Million views

Base: 400 GRP. Source: Kantar Media, Spain, Target all adults, May 2018. 45% Atresmedia, 45% Mediaset, 5% Pulsa and 5% Forta



An average broadcast
TV campaign in
Sweden
gets:

38.5

Million views

Base: 400 GRP. 2weeks. 3-99yrs. 1+ reach 59,7% Frequency 6,7 5 750 000. Source: Advantedge K2



An average
broadcast TV campaign
in French & German
Switzerland gets:



Million views

Base: 400 GRP. Source: Mediapulse TV panel (MediaWizard), D-CH + F-CH, March 2018, Adults 15+



An average
broadcast TV campaign
in the **UK**
gets:



Million views

Base: 400 GRP. Source: Thinkbox: TV Advertising's Killer Charts, May 2018 – based on BARB 2016.



An average
broadcast TV campaign
in **Ukraine**
gets:



Million views

Base: 400 GRP. Source: PPM Nielsen Ukraine, January to June 2018, Total TV, Audience: Universe (All people)



An average
broadcast TV campaign
in the **U.S.**
gets:



1.3

Billion views



Resilience

TV viewing is steady throughout a decade of innovation and different stages of life

“We're back on TV since April 2018 which I'm proud of because we should be, and it has been a productive channel for us in the past, and the broad reach nature of our product enables TV to work for us.”

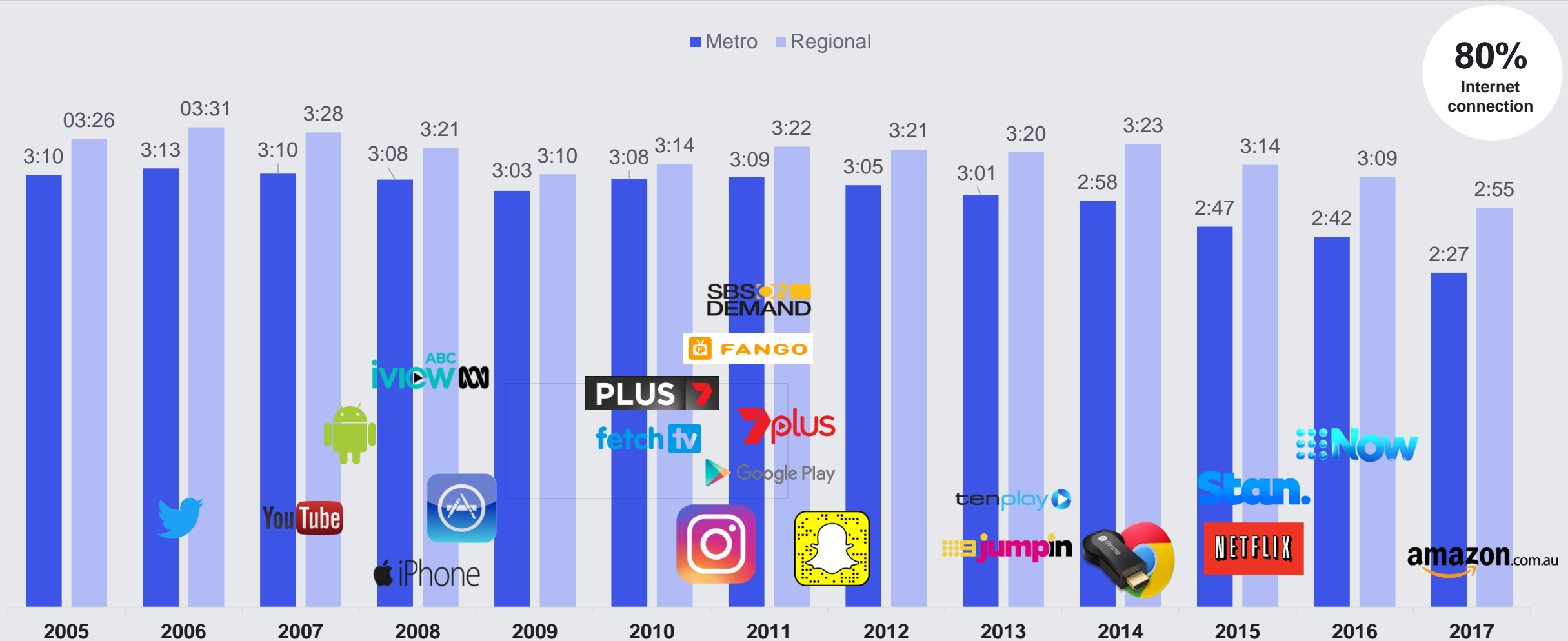
Jonathan Beamer, CMO of Monster

September 2018

Despite a decade of potential disruptions, TV viewing on a TV set has remained remarkably stable



Hours of Linear TV viewed on a TV set per day



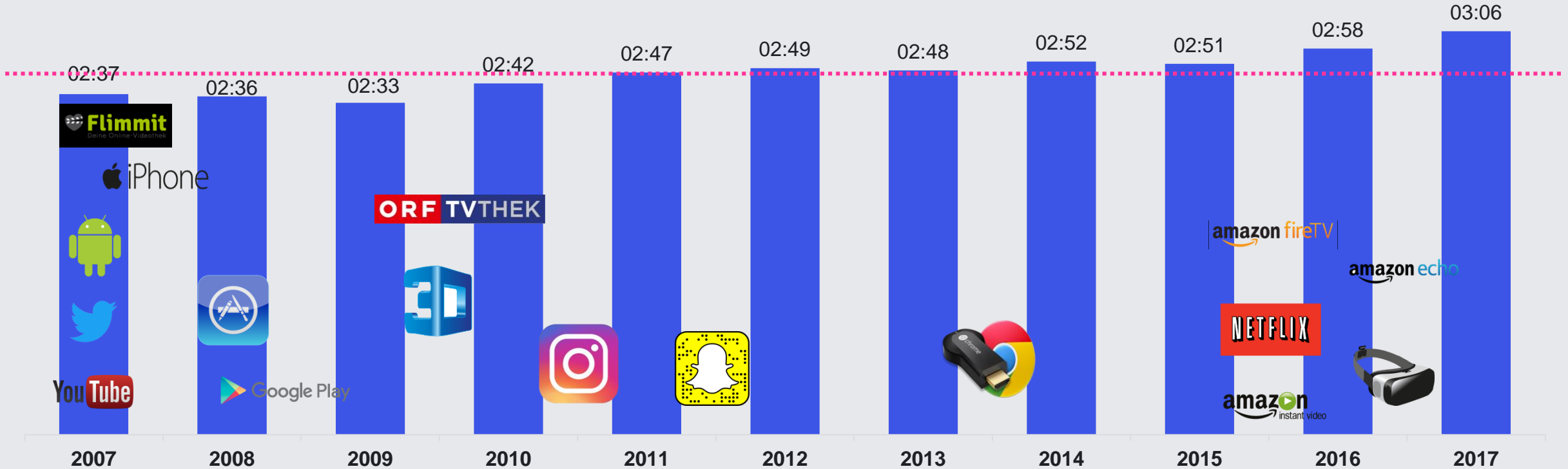
Hours of TV viewed on a TV set per day

69%

Internet
user

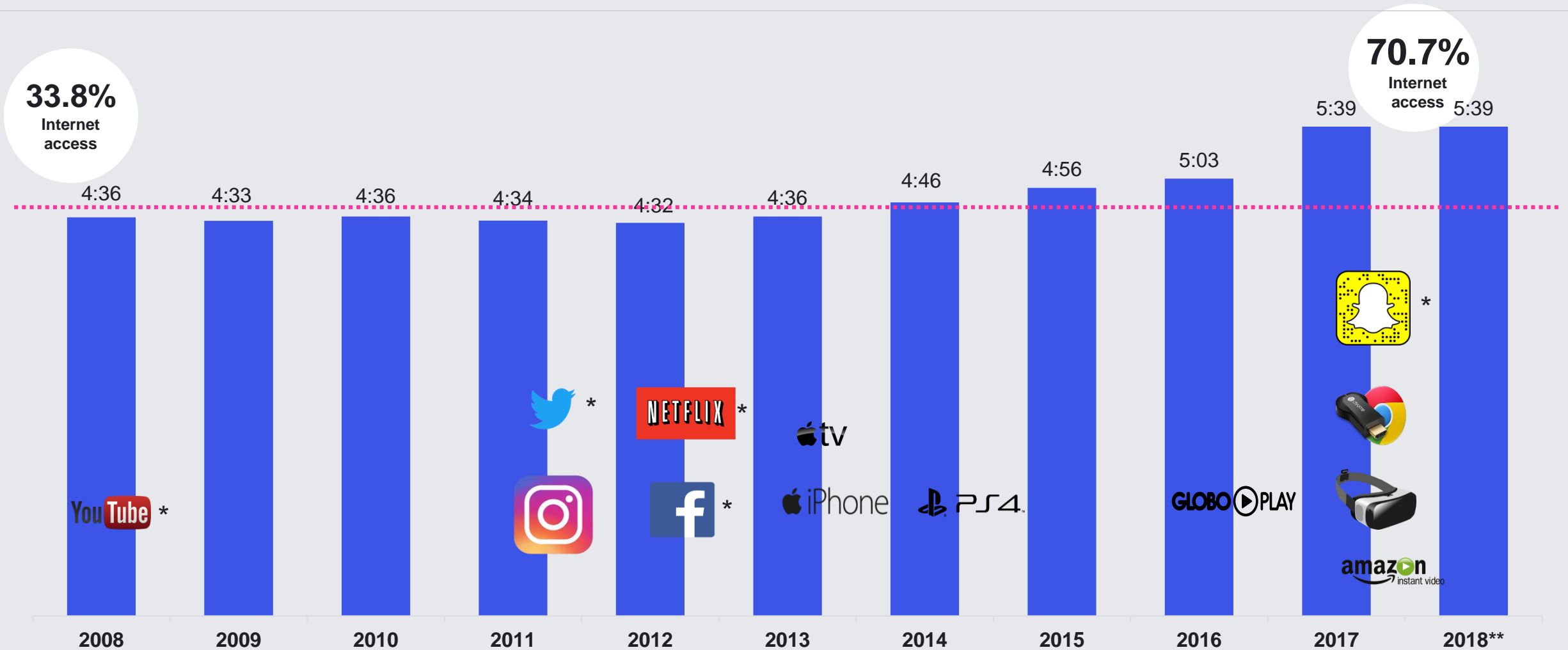
86%

Internet
user



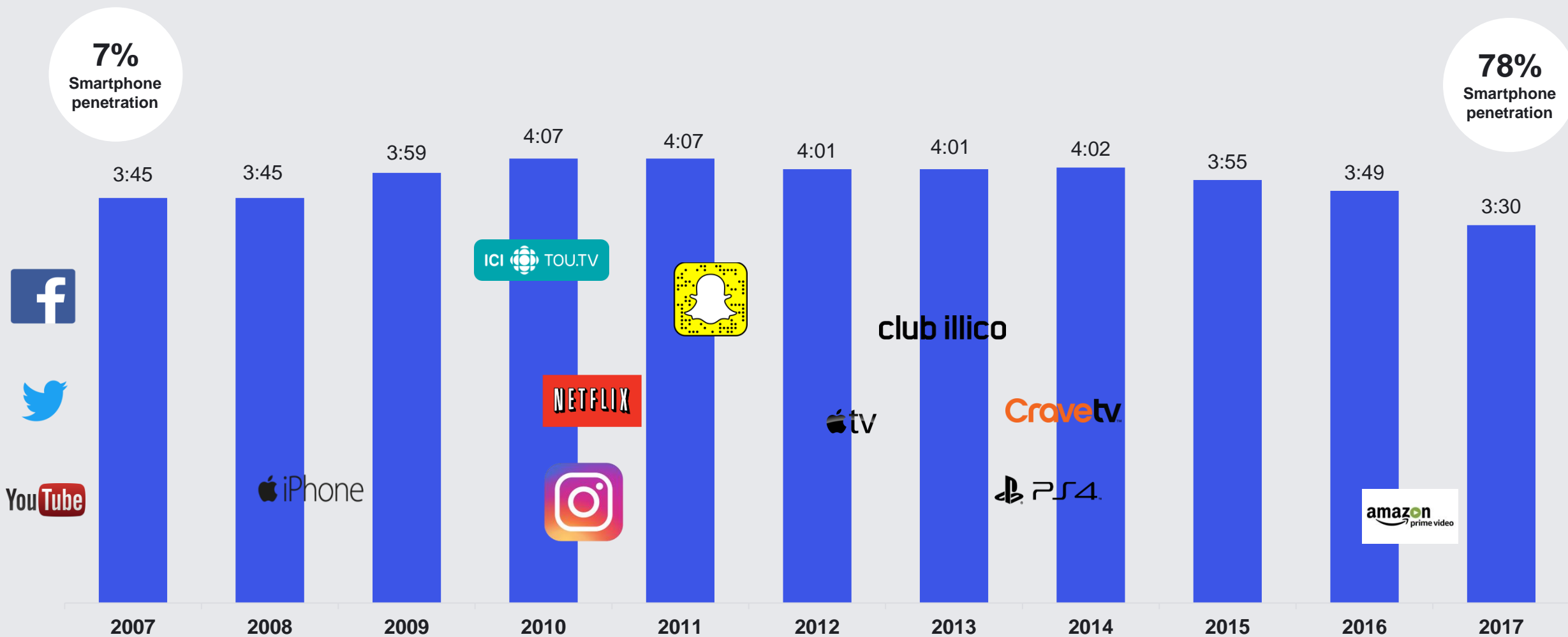
The pink line represents the average time spent (02:47)

Hours of TV viewed on a TV set per day

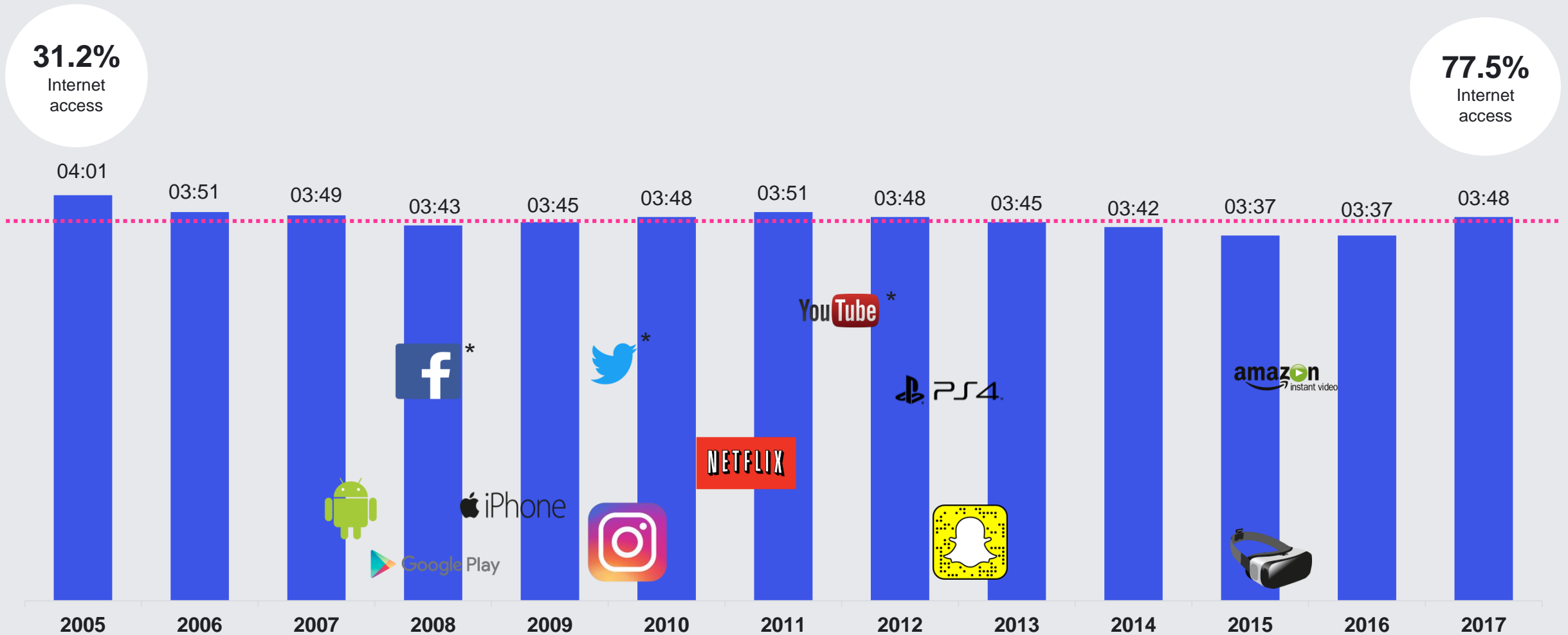


The pink line represents the average time spent (04:45)

Hours of TV viewed on a TV set per day

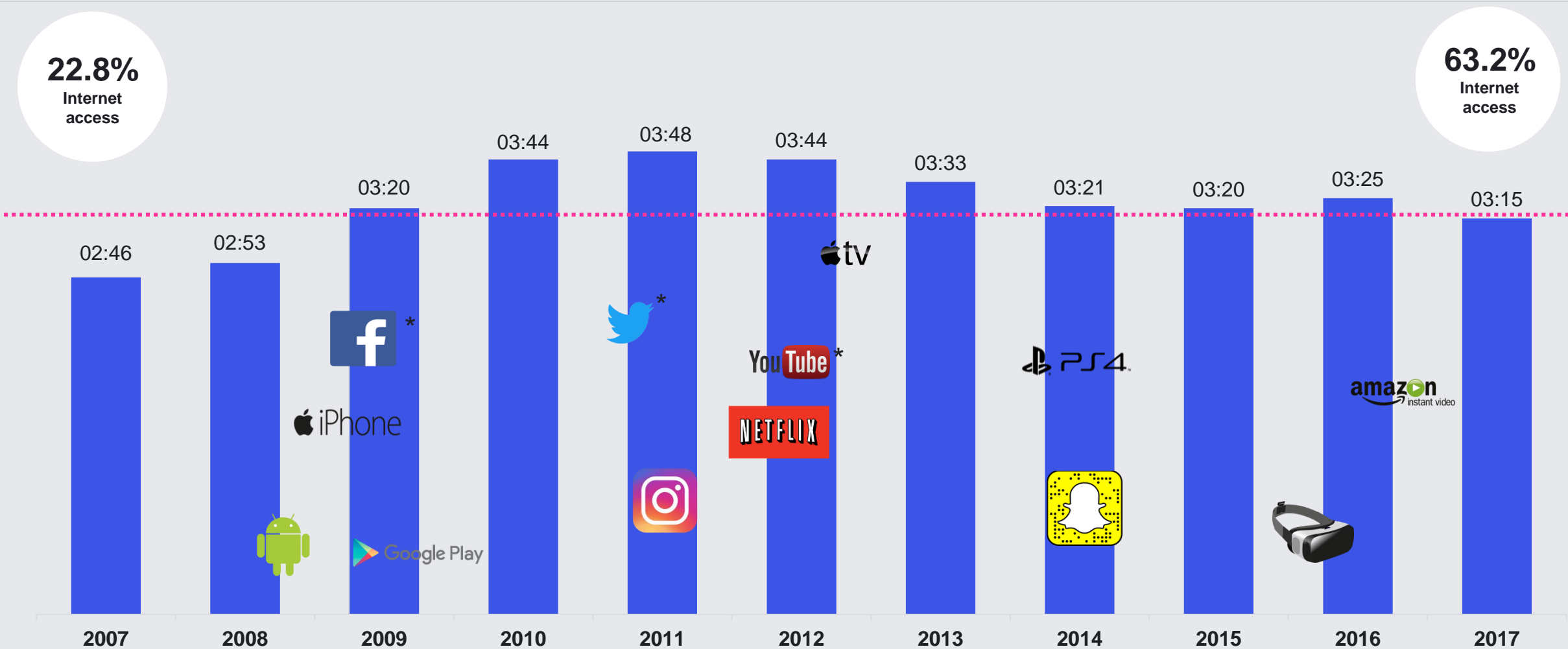


Hours of TV viewed on a TV set per day



The pink line represents the average time spent (03:46)

Hours of TV viewed on a TV set per day

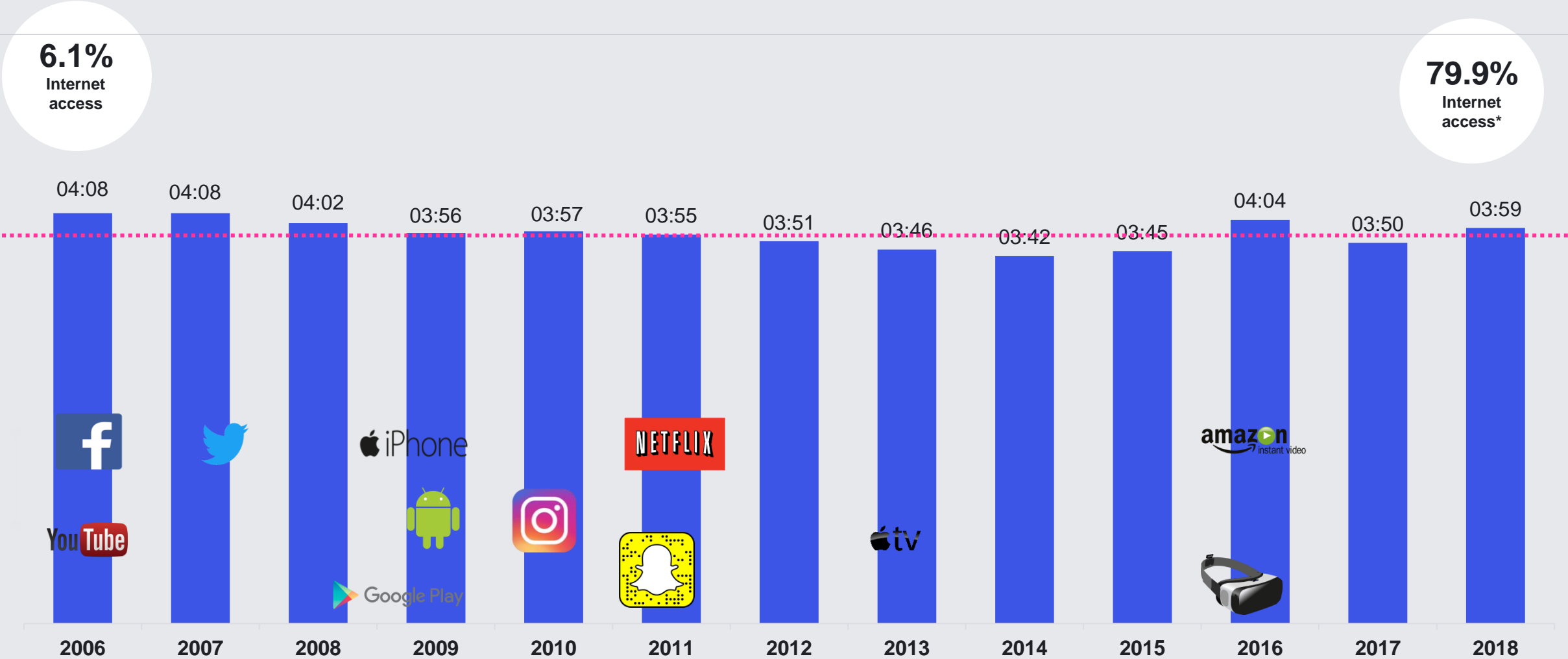


22.8%
Internet
access

63.2%
Internet
access

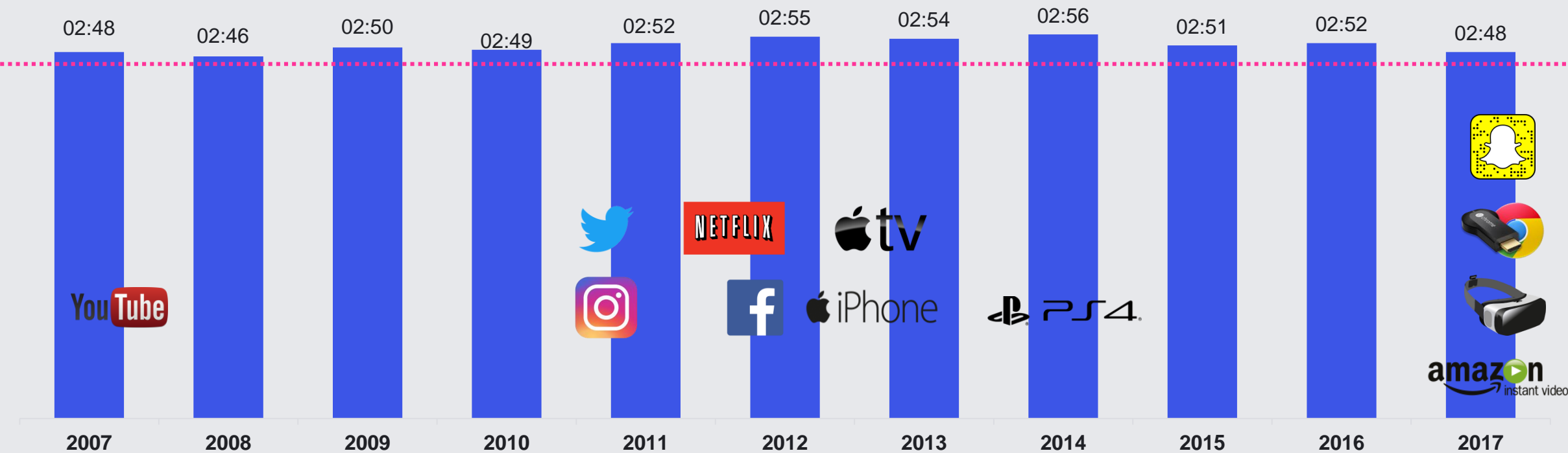
The pink line represents the average time spent (03:22)

Hours of TV viewed on a TV set per day



The pink line represents the average time spent (03:55)

Hours of TV viewed on a TV set per day



The pink line represents the average time spent (02:37)

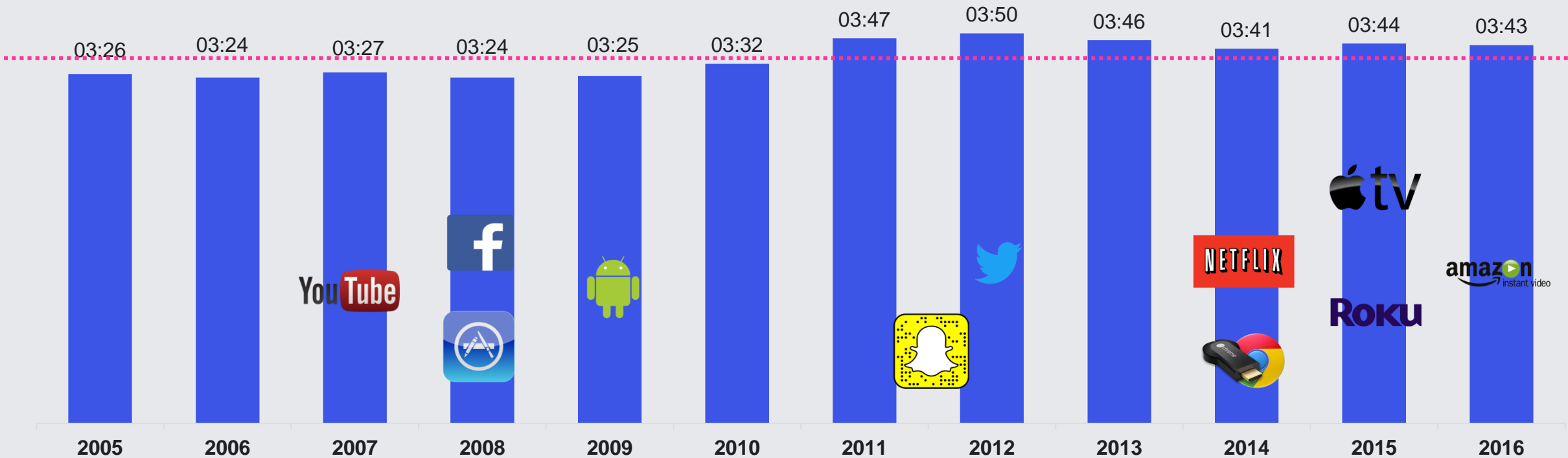
Hours of TV viewed on a TV set per day

43%

Internet
access

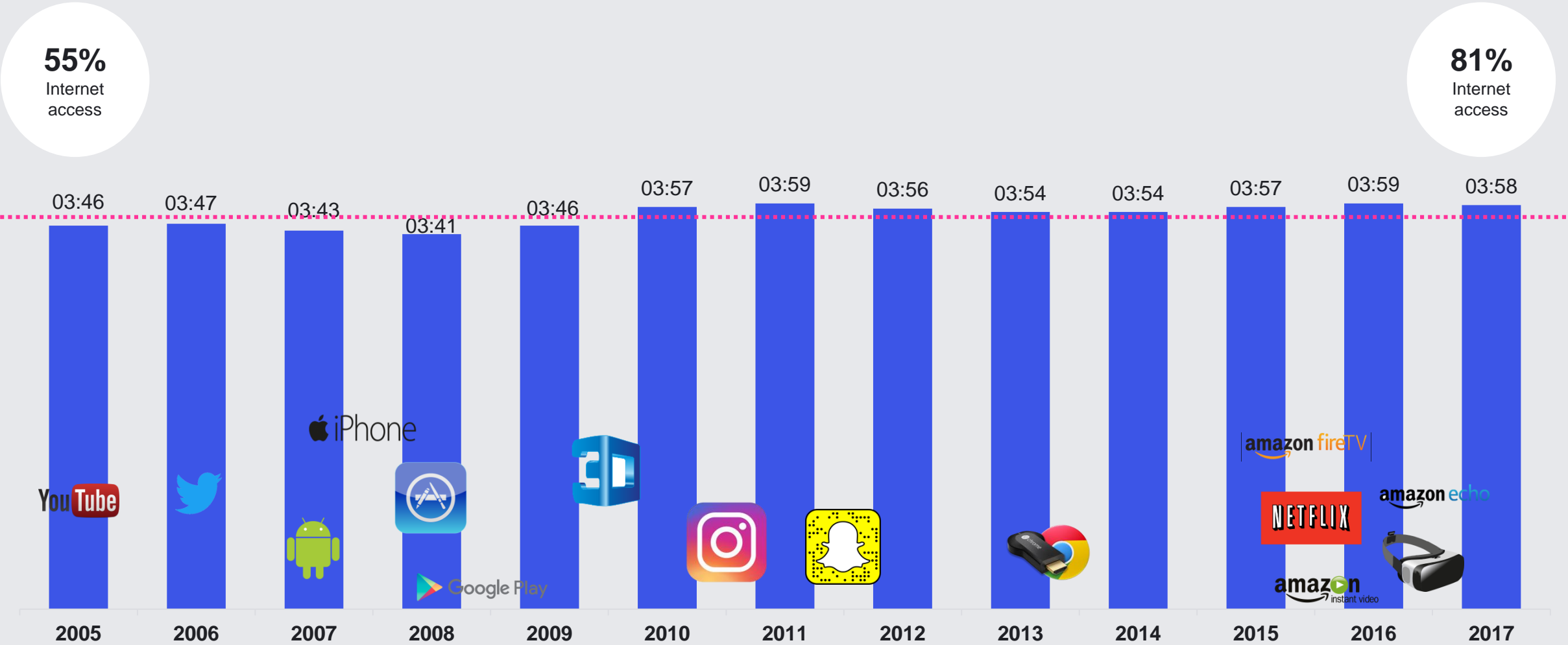
77%

Internet
access



The pink line represents the average time spent (03:35)

Hours of TV viewed on a TV set per day



The pink line represents the average time spent (03:52)

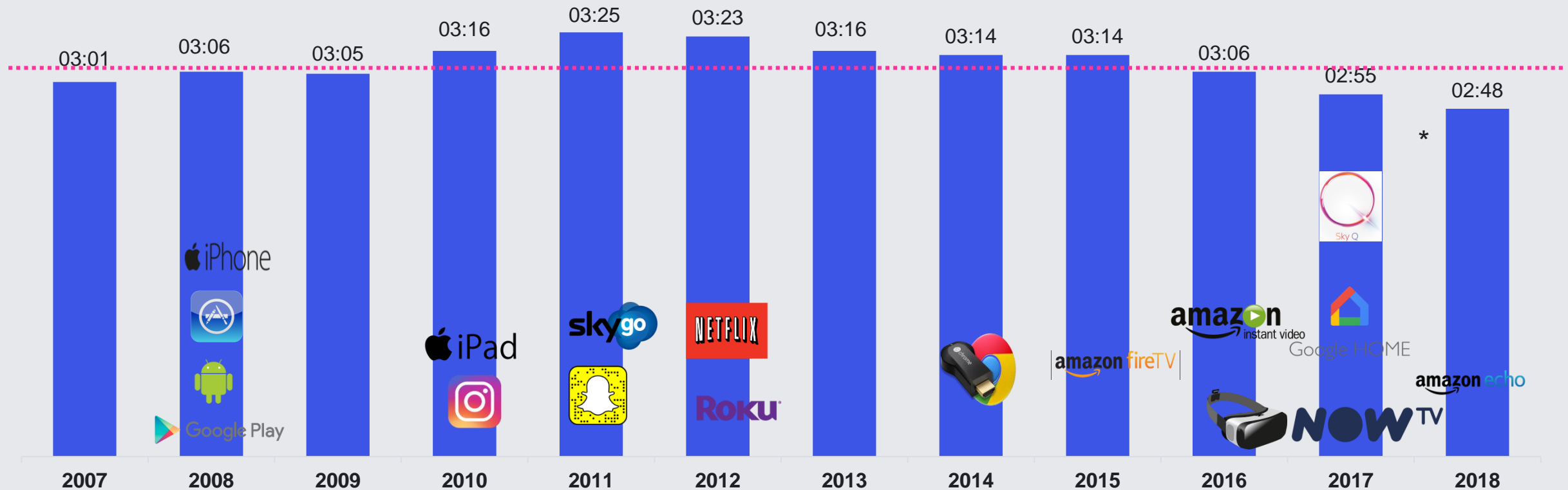
Hours of TV viewed on a TV set per day

57%

Internet
access

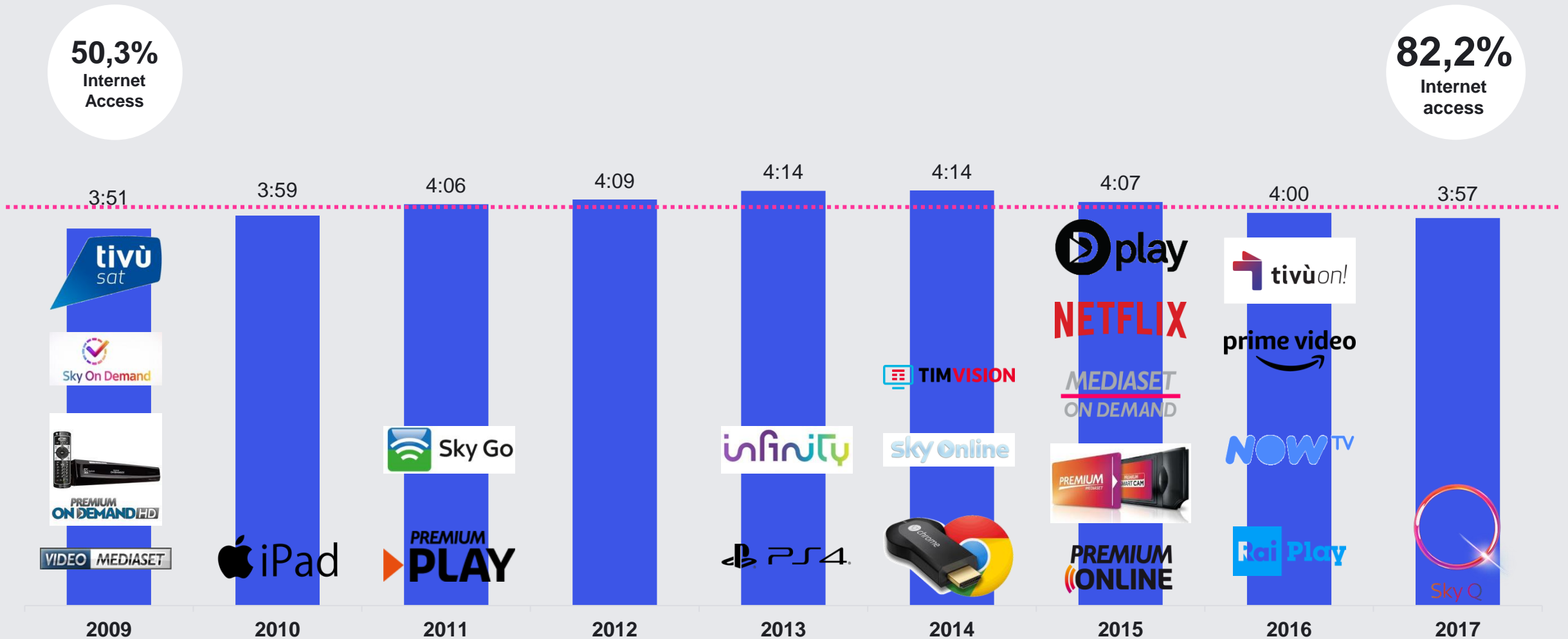
89%

Internet
access

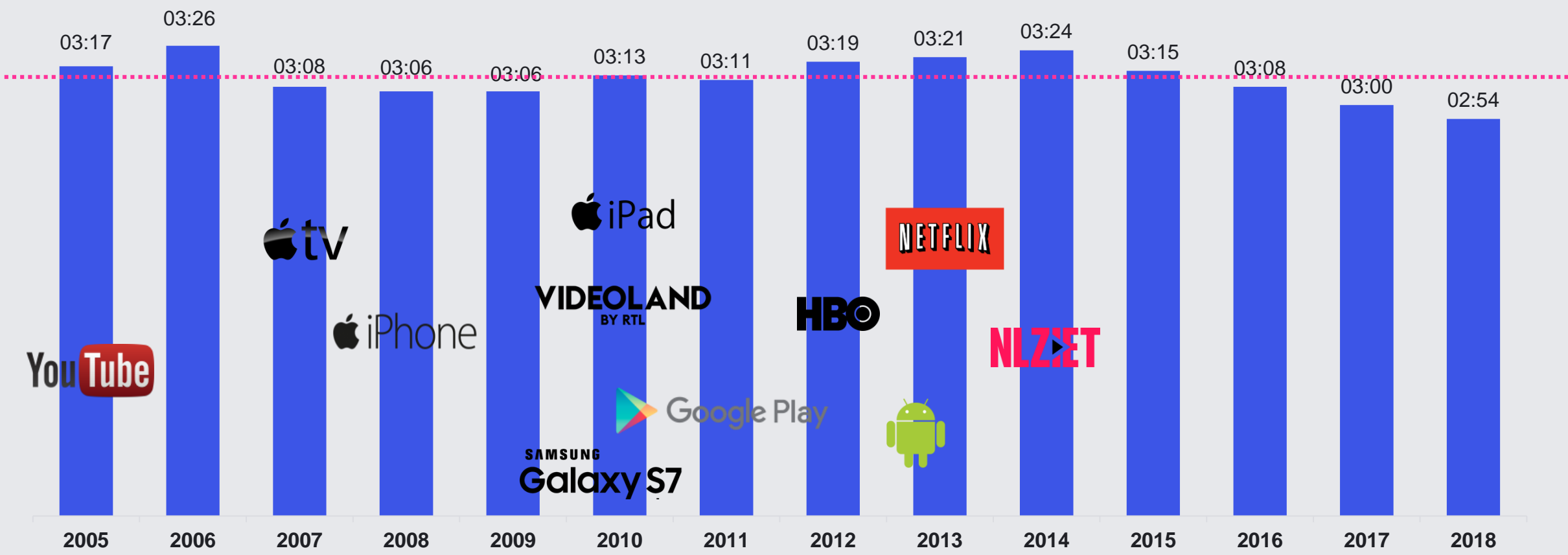


The pink line represents the average time spent (03:09)

Hours of TV viewed on a TV set per day

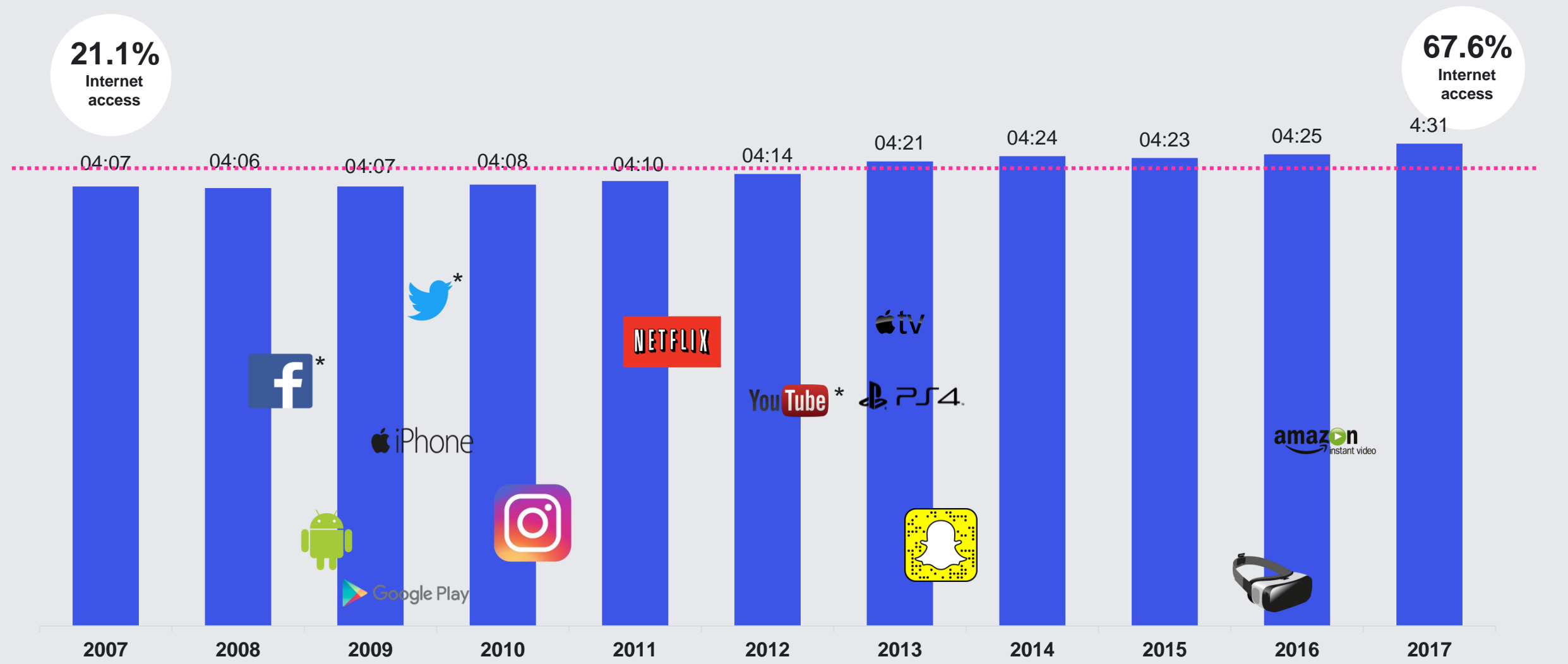


Hours of Broadcast TV viewed on a TV set per day



The pink line represents the average time spent (03:12)

Hours of Broadcast TV viewed on a TV set per day



21.1%
Internet access

67.6%
Internet access

The pink line represents the average time spent (04:16)

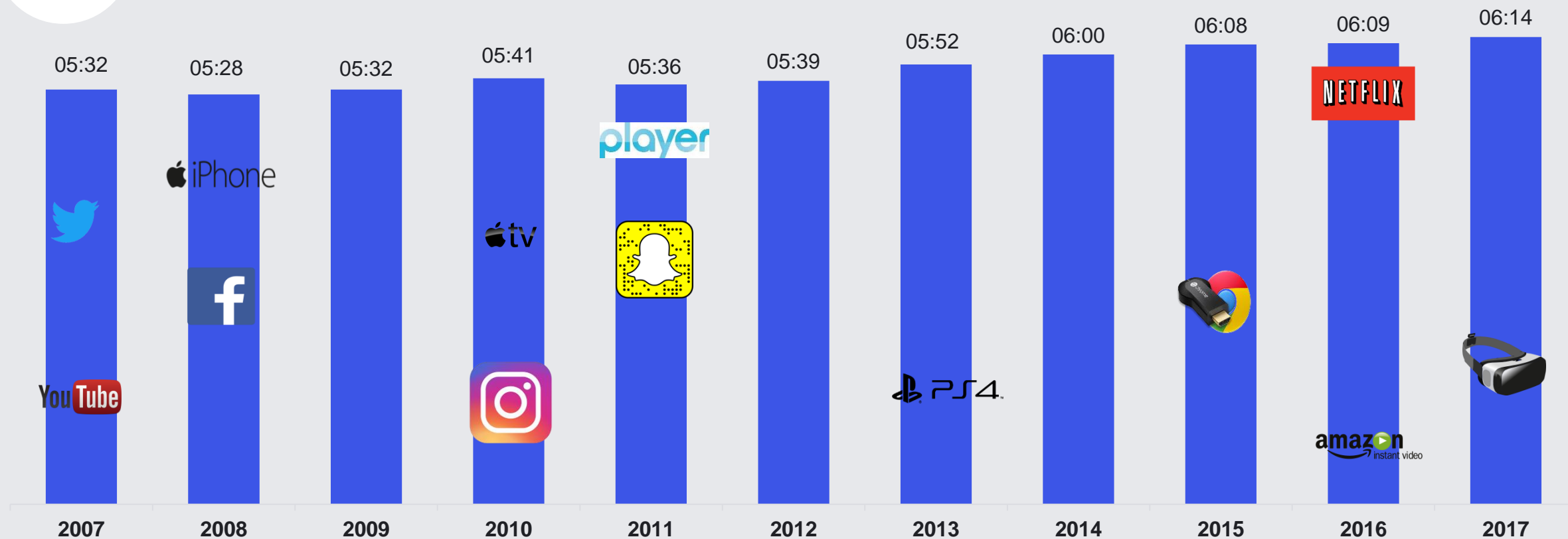
Hours of TV viewed on a TV set per day

41,4%

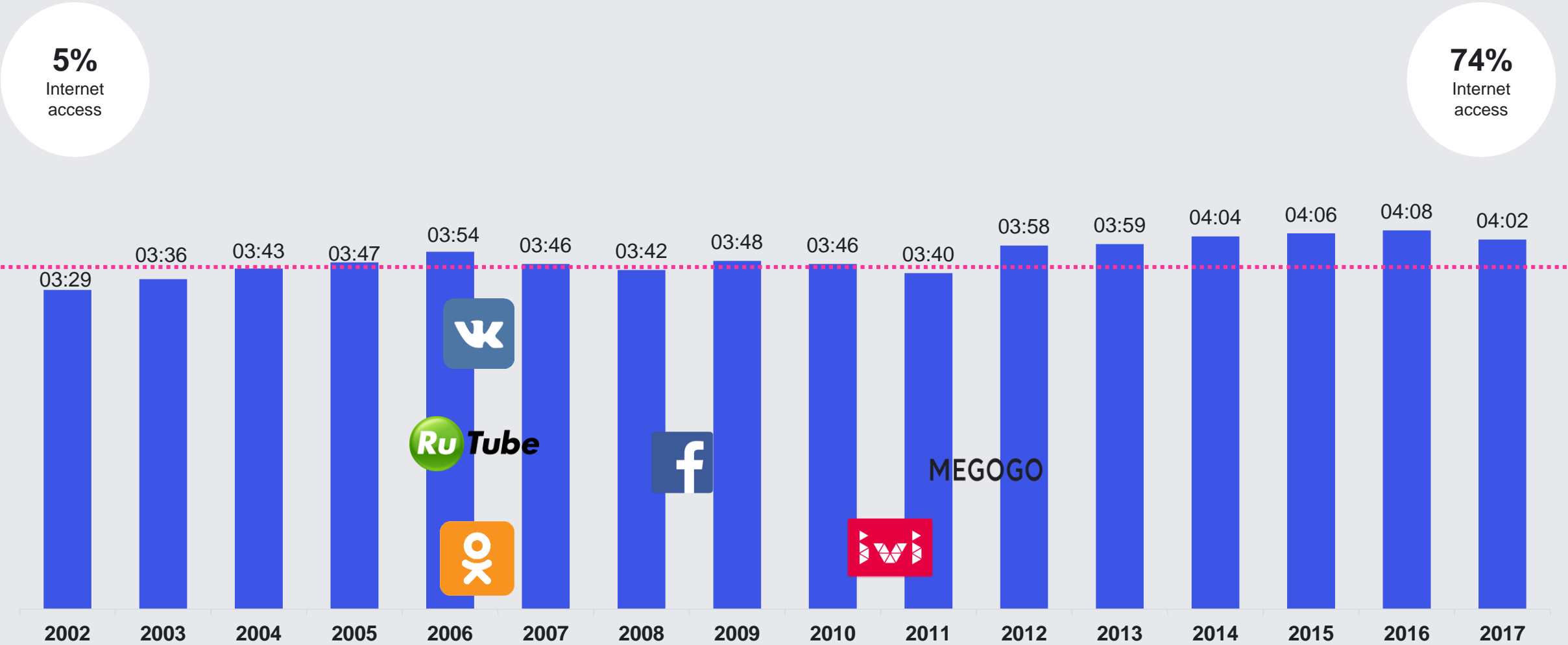
Internet
access

78,5%

Internet
access

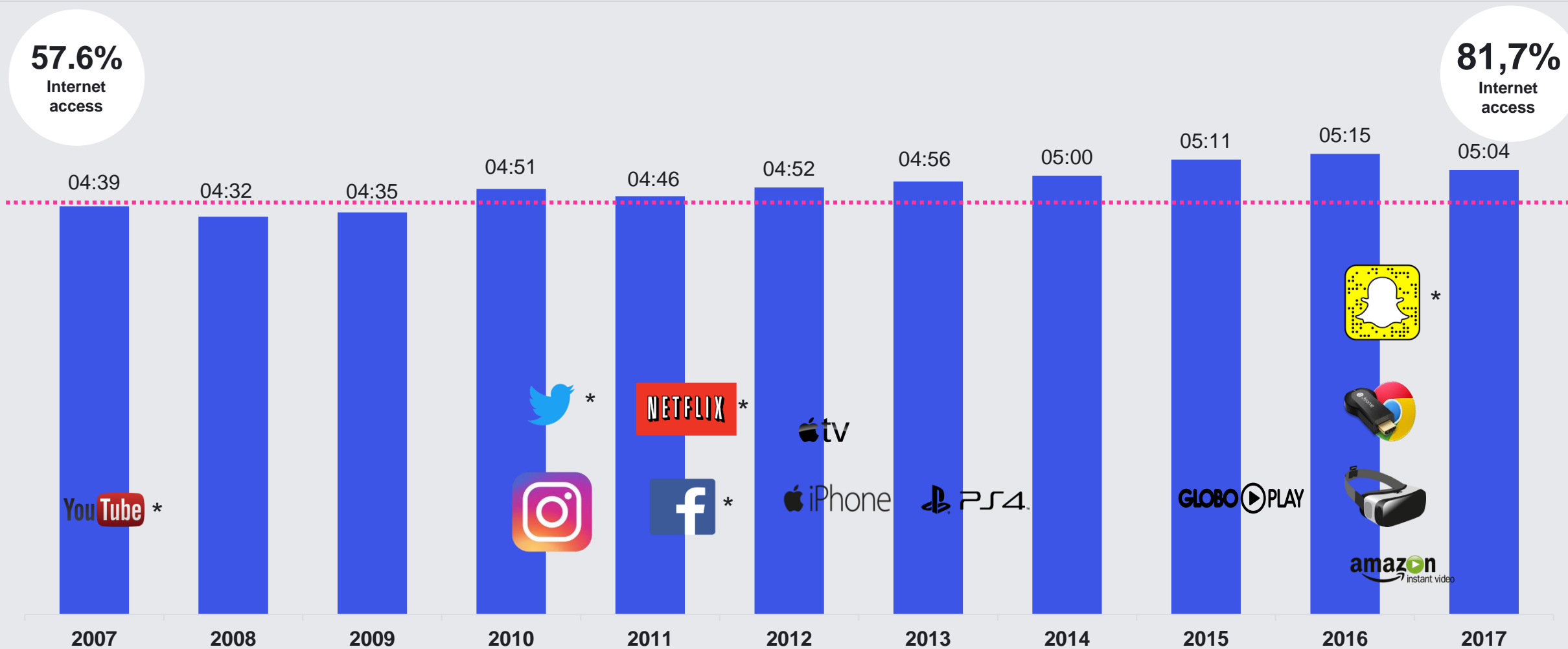


Hours of TV viewed on a TV set per day



The pink line represents the average time spent (03:45)

Hours of TV viewed on a TV set per day



The pink line represents the average time spent (04:53)

Hours of TV viewed on a TV set per day

76.5%

Internet
Access in
2007

90.3%

Internet
access

3:07

3:09

3:14

3:01

2:56

2:57

2:58

tv

iPhone

PS4

GLOBO PLAY



amazon
instant video

2011

2012

2013

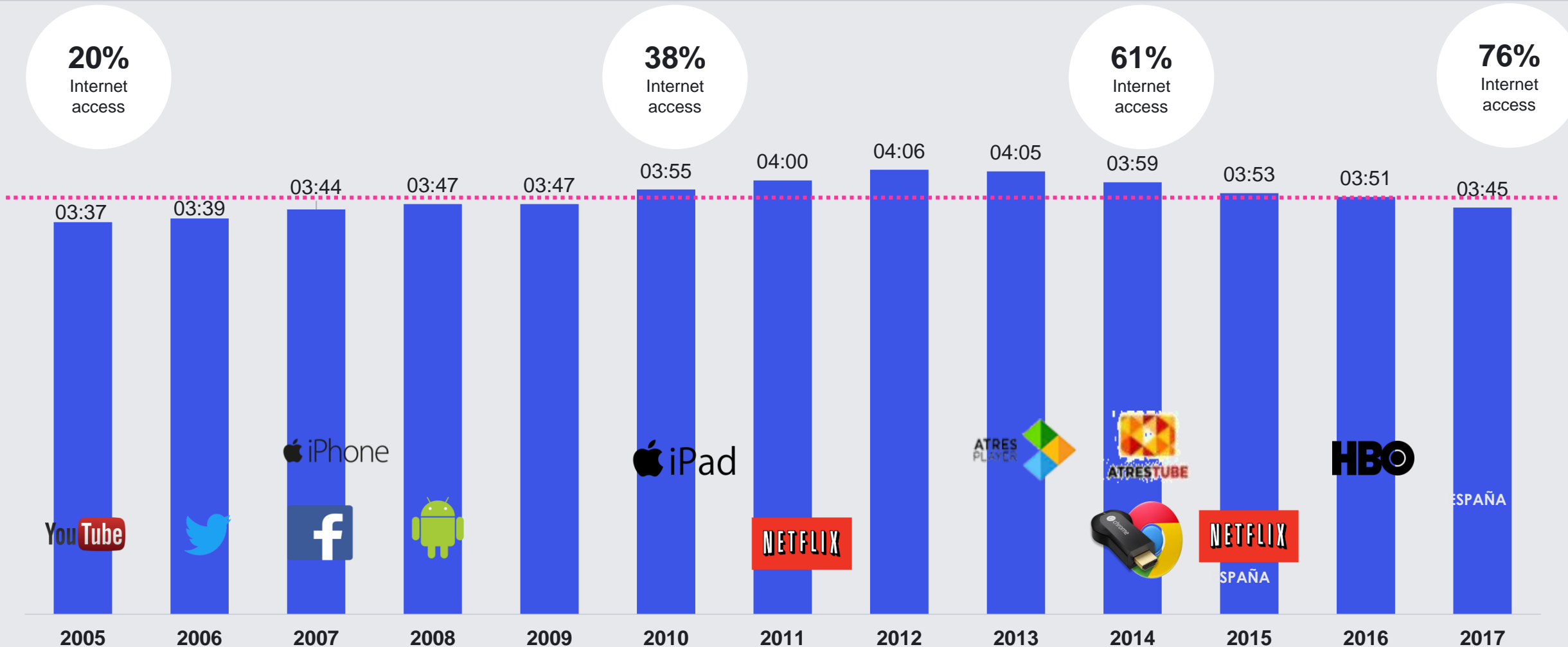
2014

2015

2016

2017

Hours of TV viewed on a TV set per day



The pink line represents the average time spent (03:51)

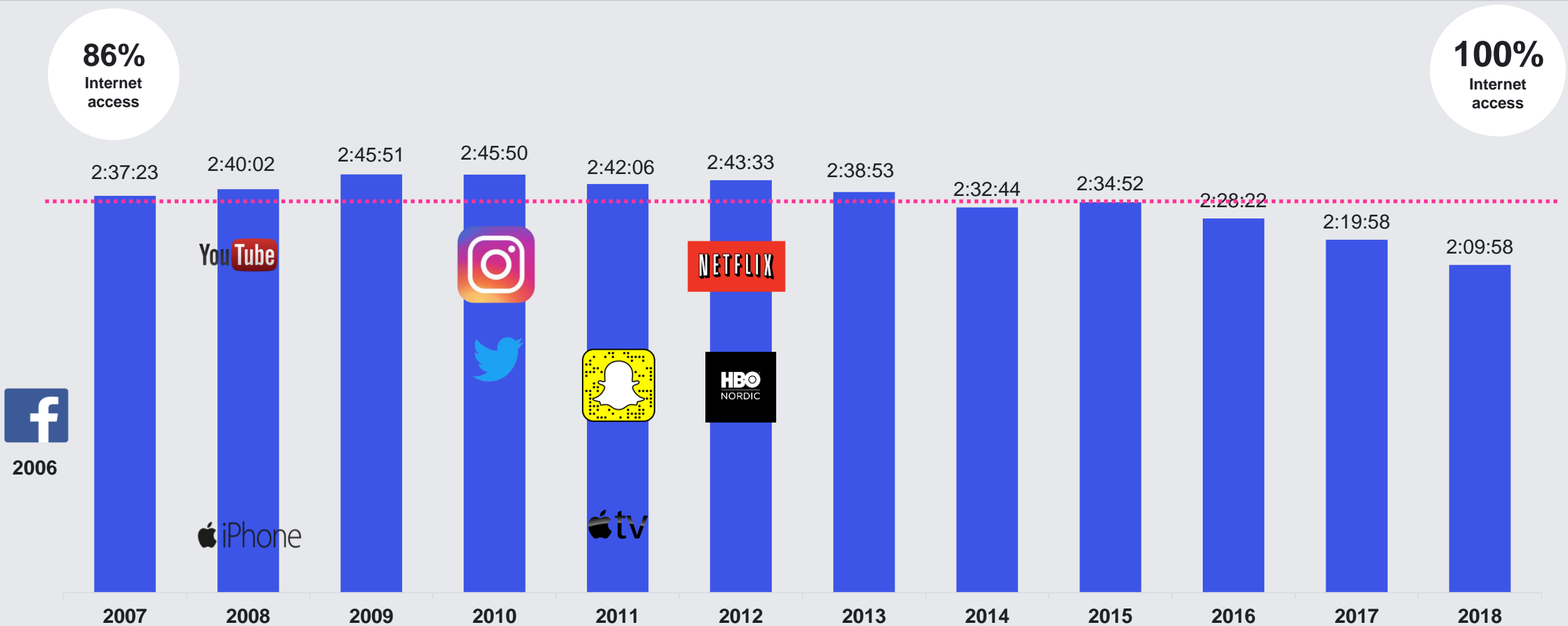
Hours of TV viewed on a TV set per day

86%

Internet
access

100%

Internet
access



The pink line represents the average time spent (02:34)

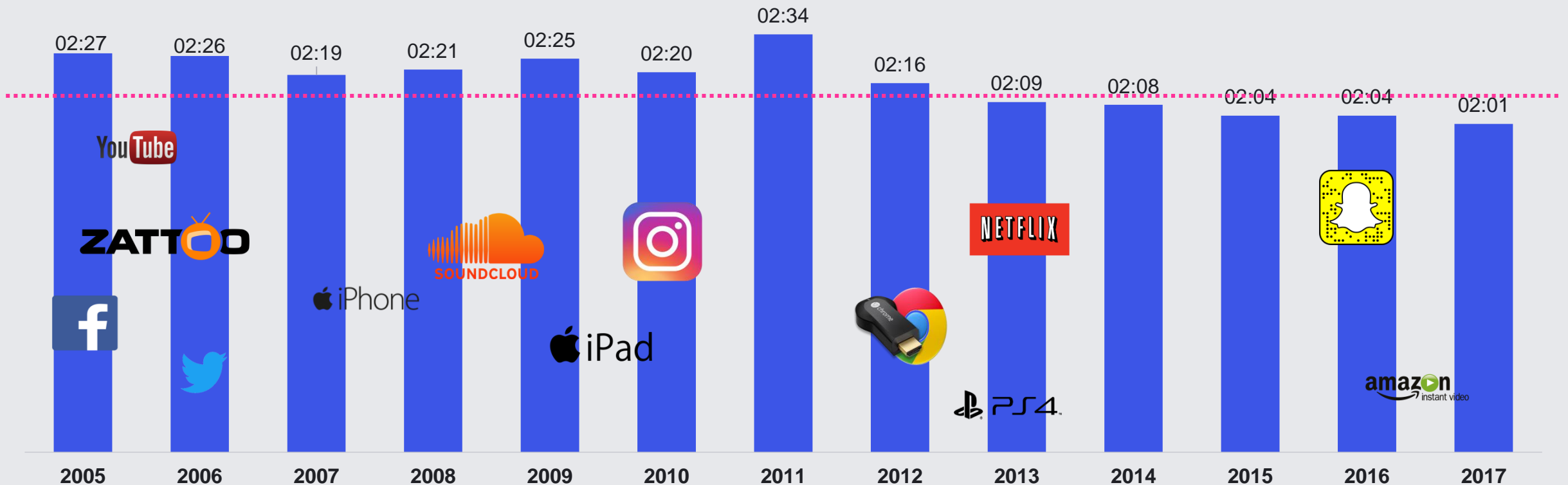
Hours of TV viewed on a TV set per day

40%

Internet
access

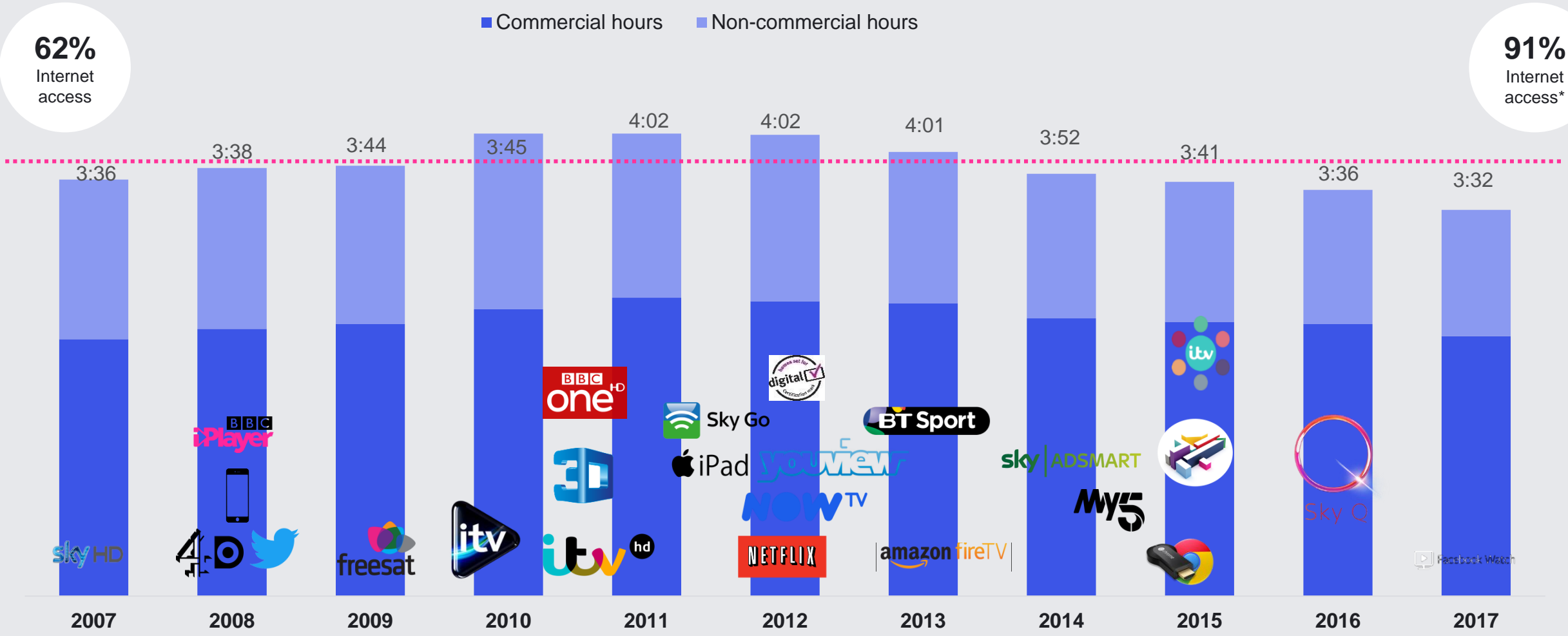
89%

Internet
access



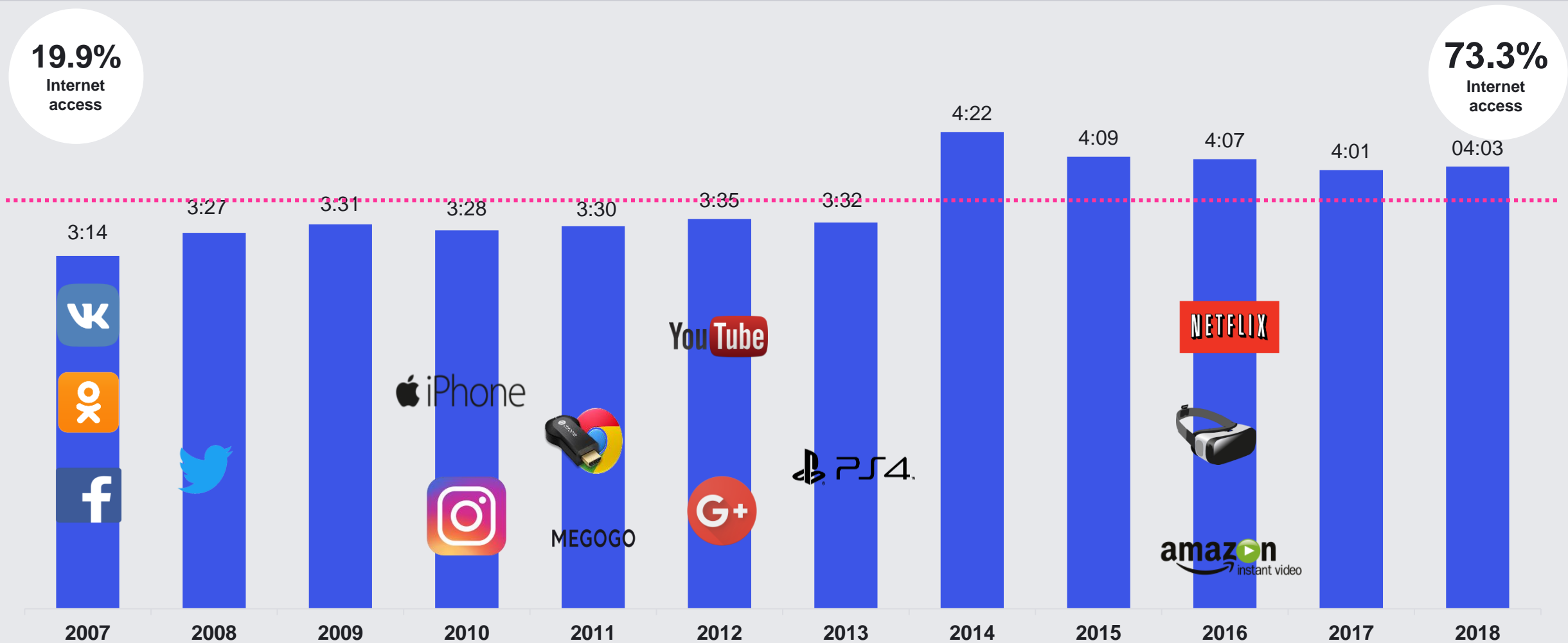
The pink line represents the average time spent (02:14)

Hours of TV viewed on a TV set per day



The pink line represents the average time spent (03:45)

Hours of TV viewed on a TV set per day



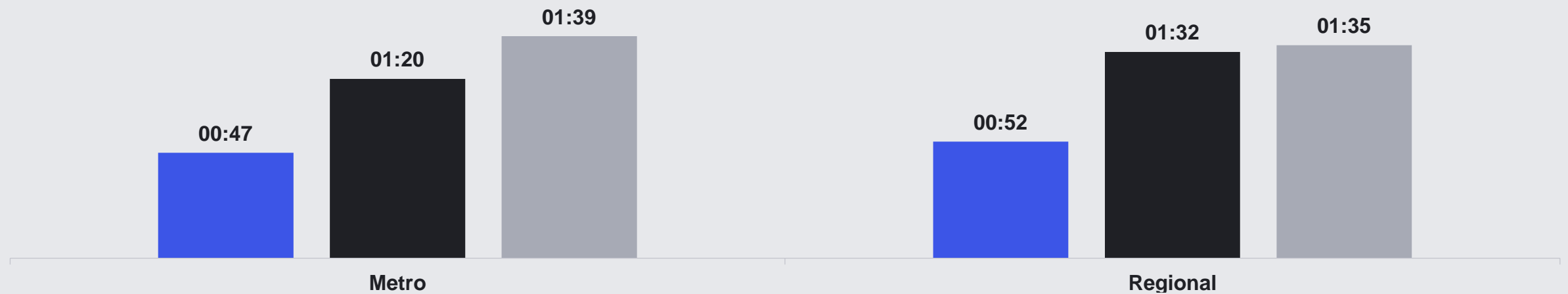
**Today's younger
generation is tomorrow's
heavy TV viewers**



Australian Millennials' TV viewing increases as they get older and have kids

Average hours viewed per day

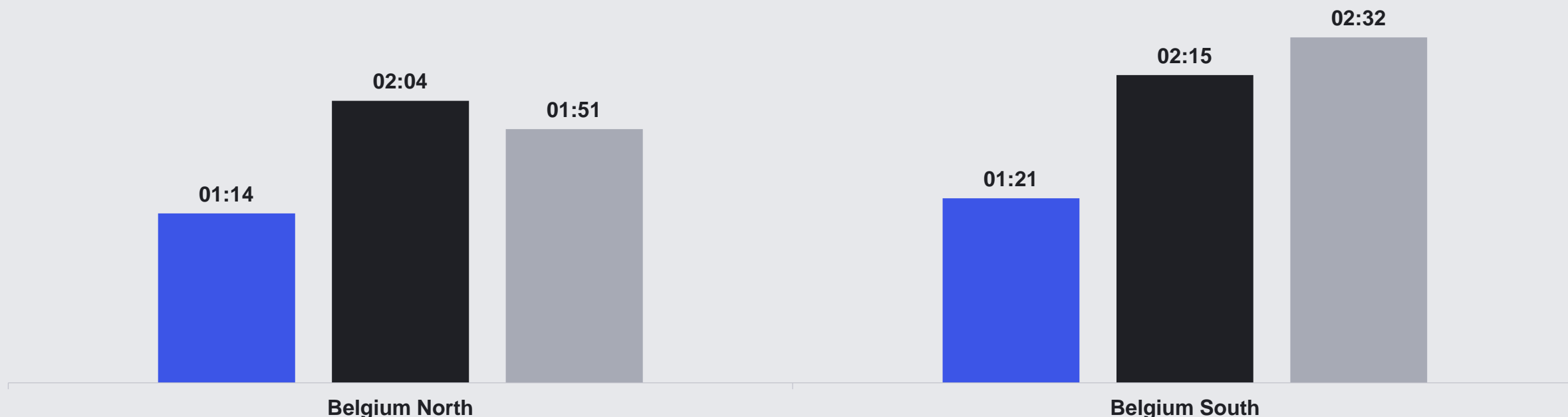
■ 16-24 ■ 25-34 ■ 25-34 with children



Belgian Millennials' TV viewing increases as they get older and have kids

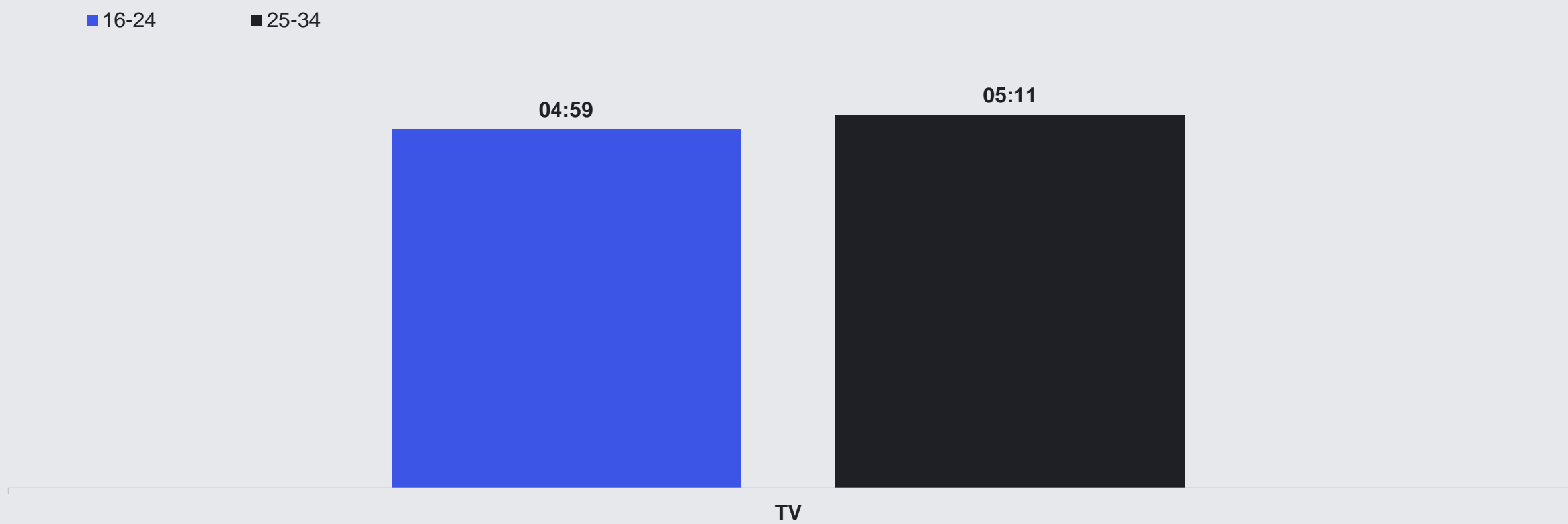
Average hours viewed per day

■ 15-24 ■ 25-34 ■ 25-34 with children



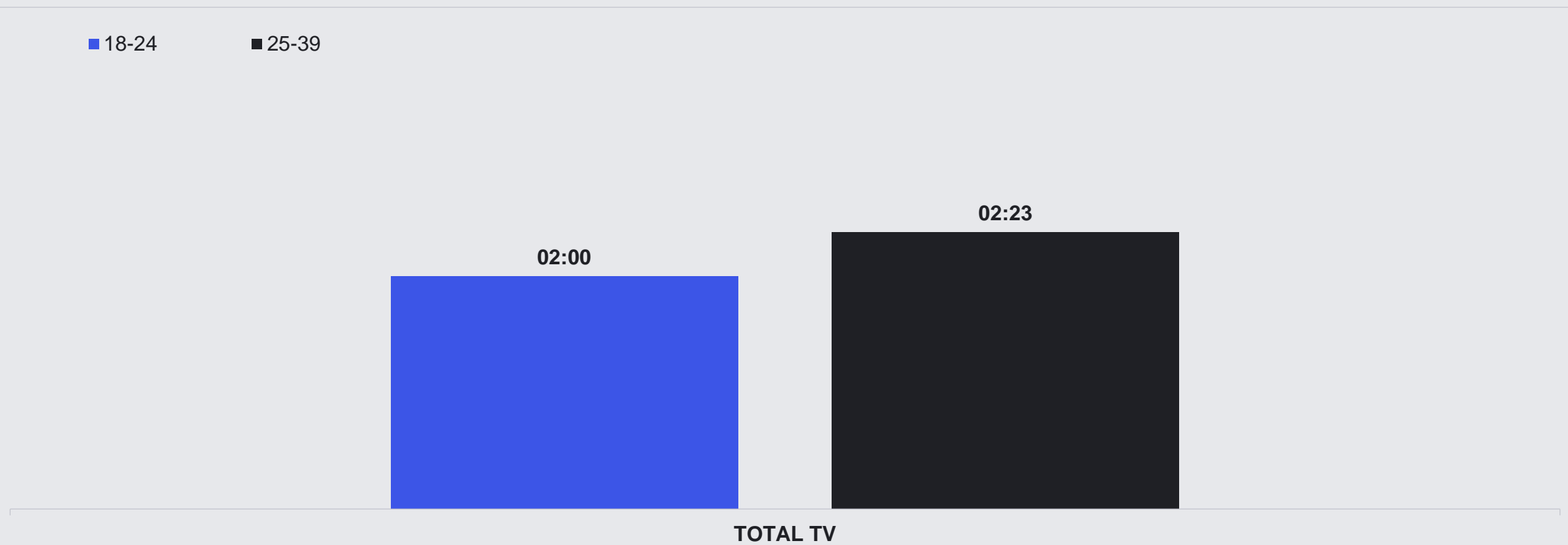
Brazilian Millennials' Broadcast TV viewing increases as they get older

Average hours viewed per day



Colombian Millennials' TV viewing increases as they get older

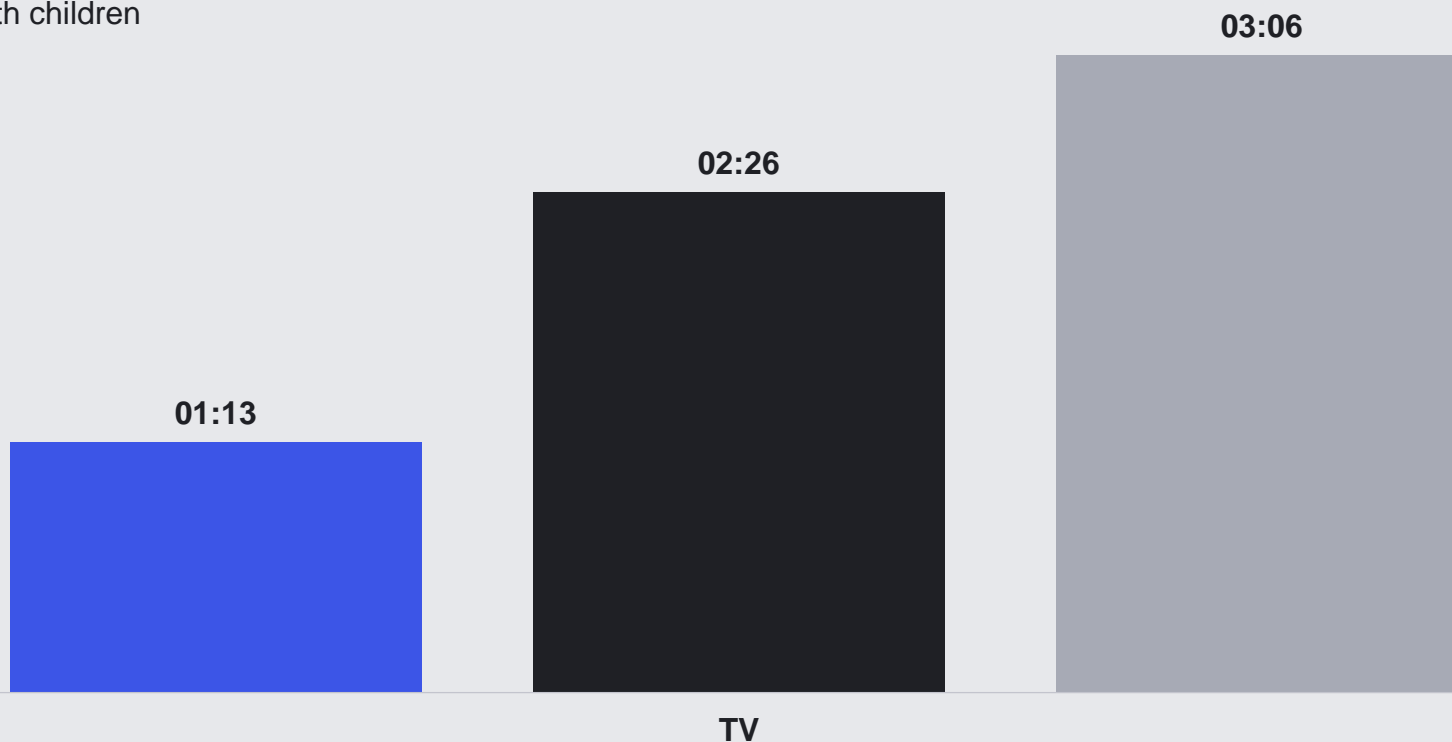
Average hours viewed per day



Czech Millennials' TV viewing increases as they get older and have kids

Average hours viewed per day

■ 15-24 ■ 25-34 ■ 25-34 with children



Finnish Millennials watch TV

Average hours viewed per day

■ 15-24

■ 25-34

TV + Other screens

01:21

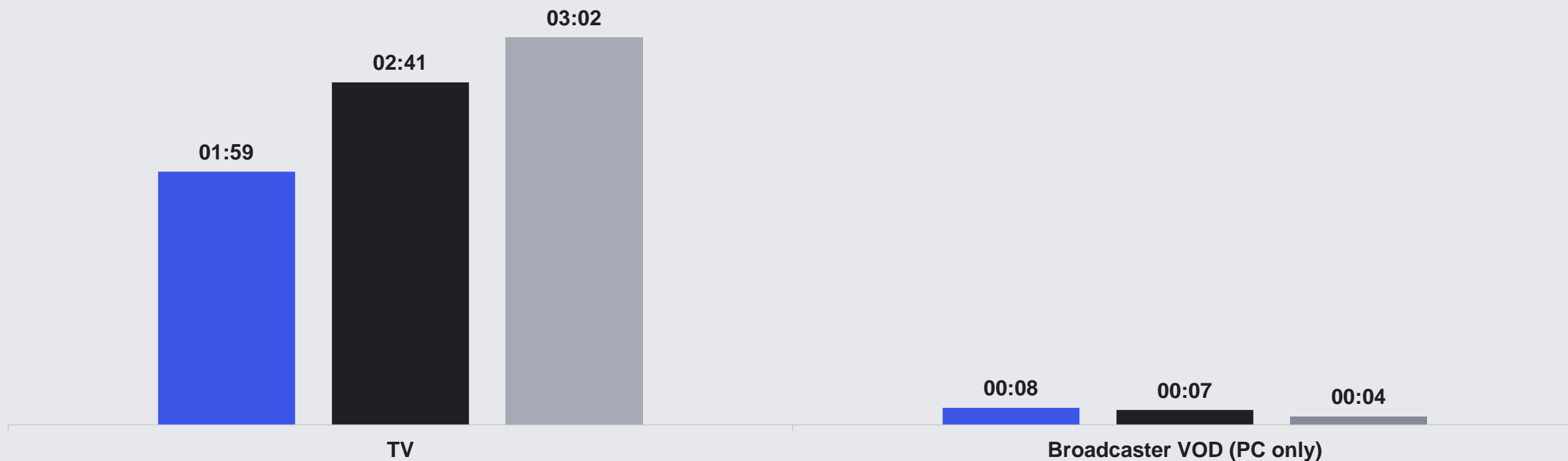
02:39

TOTAL TV

Italian Millennials' TV viewing increases as they get older and have kids

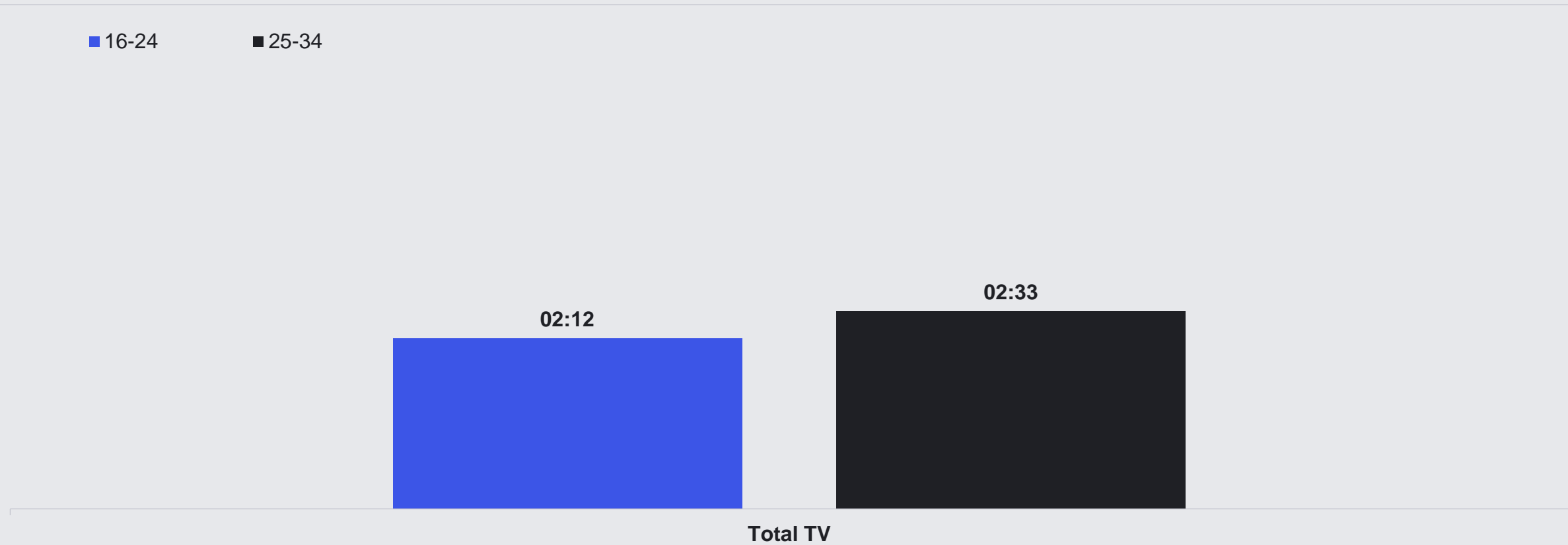
Average hours viewed per day

■ 15-24 ■ 25-34 ■ 25-34 with children



Mexican Millennials' TV viewing increases as they get older

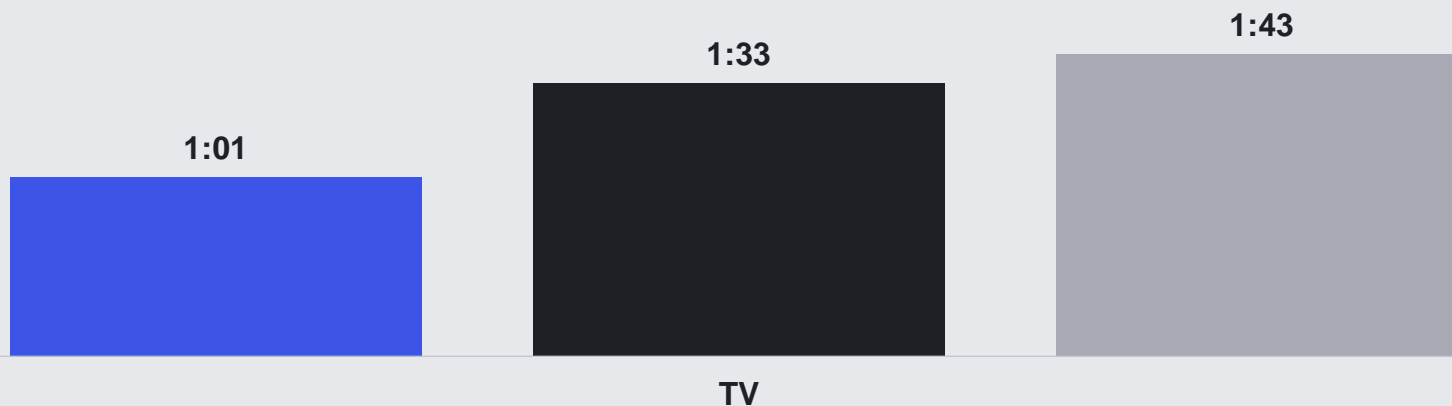
Average hours viewed per day



Dutch Millennials' TV viewing increases as they get older and have kids

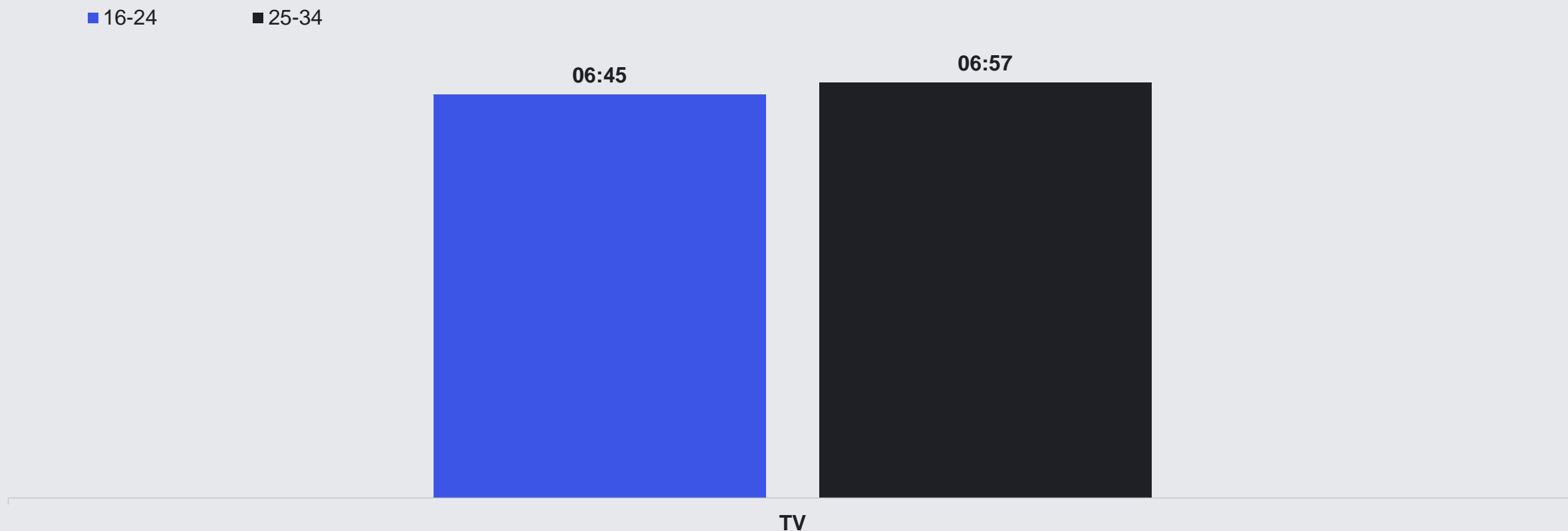
Average hours viewed per day

■ 13-19 ■ 20-25 ■ 20-34 with children



Peruvian Millennials' TV viewing increases as they get older

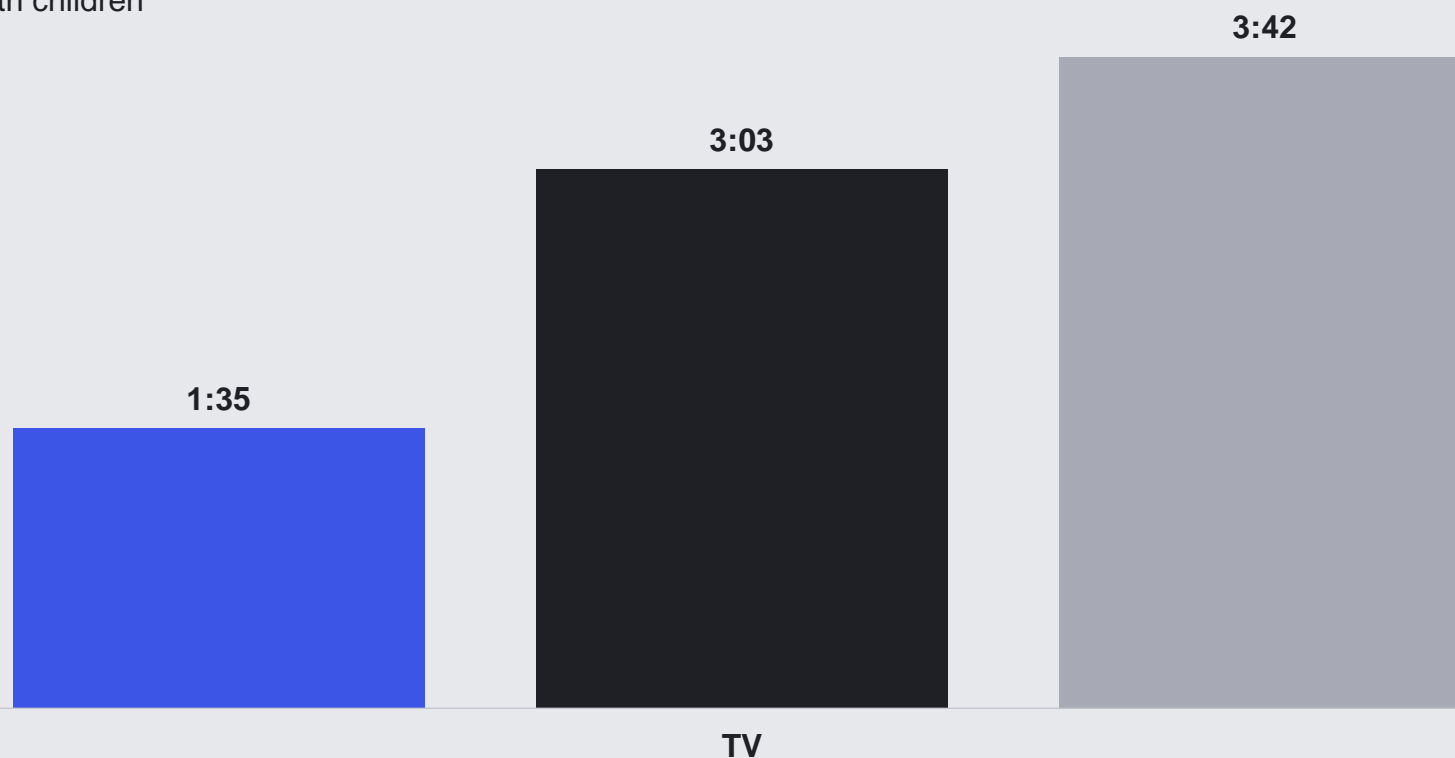
Average hours viewed per day



Polish Millennials' TV viewing increases as they get older and have kids

Average hours viewed per day

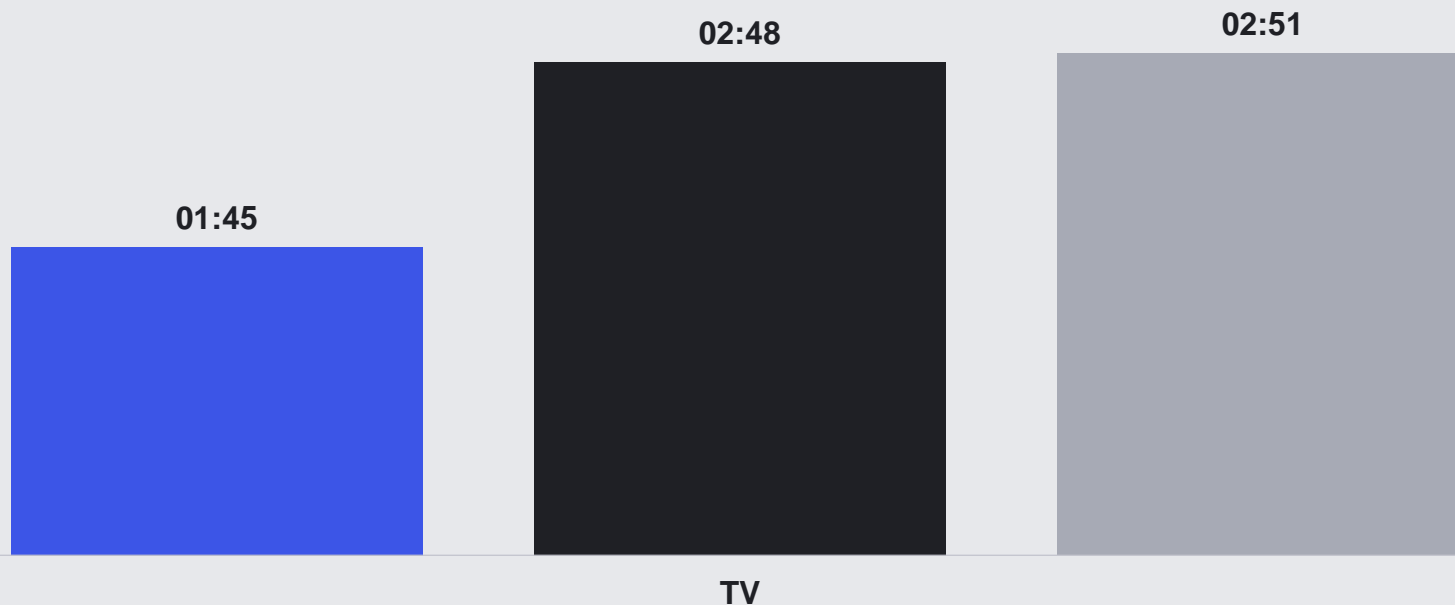
■ 16-24 ■ 25-34 ■ 25-34 with children



Russian Millennials' TV viewing increases as they get older and have kids

Average hours viewed per day

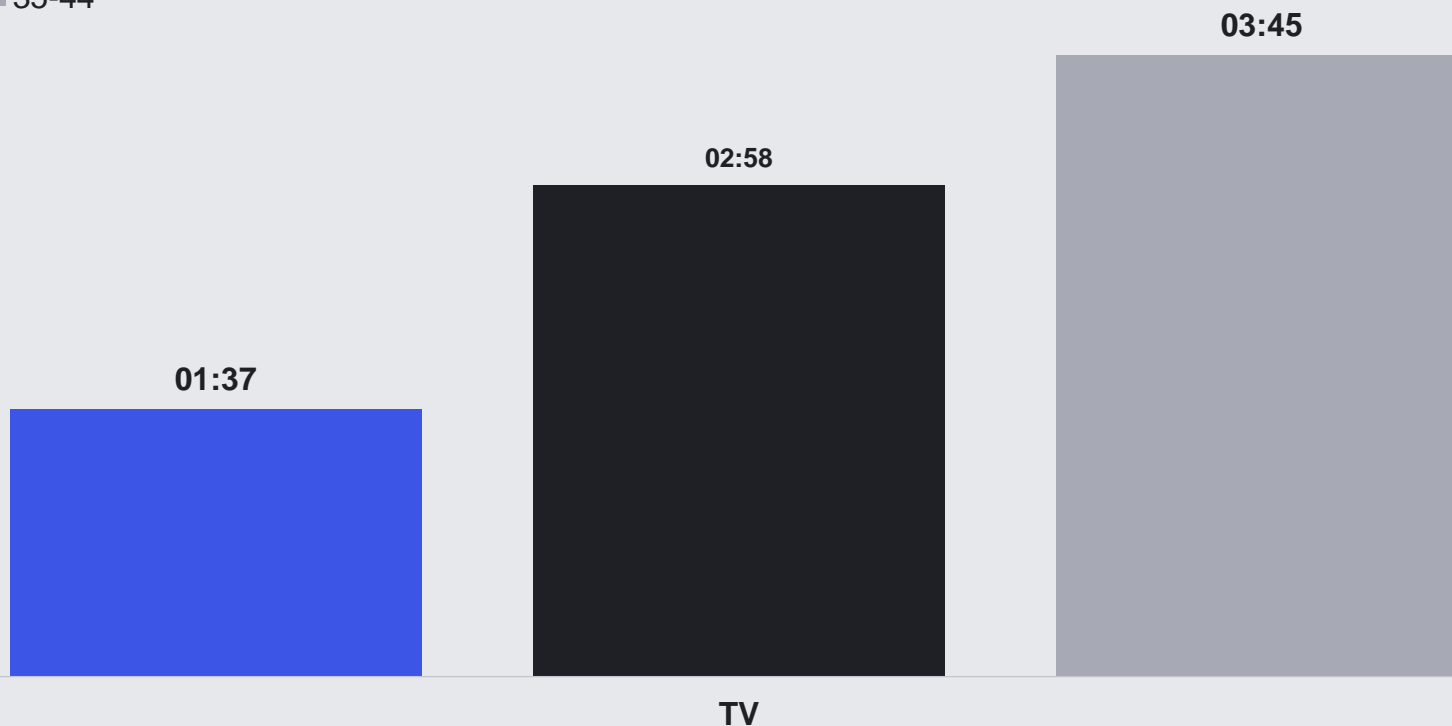
■ 15-24 ■ 25-34 ■ 25-34 with children



Slovenian Millennials' TV viewing increases as they get older

Average hours viewed per day

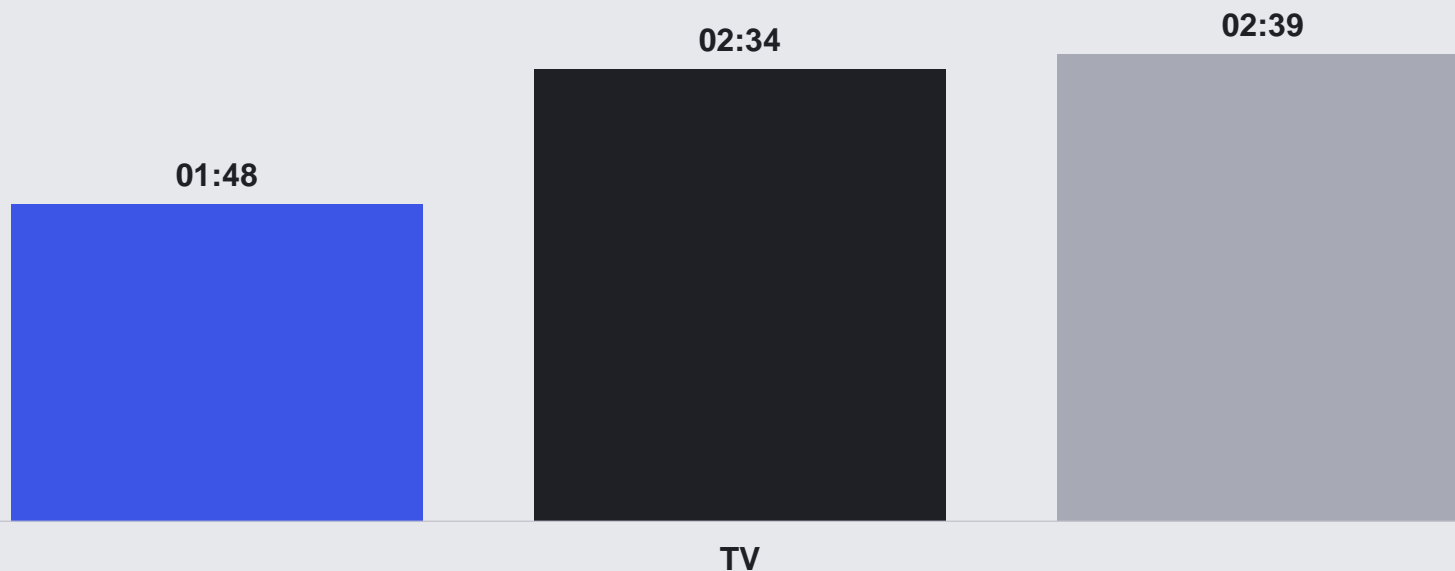
■ 15-24 ■ 25-34 ■ 35-44



Spanish Millennials' TV viewing increases as they get older and have kids

Average hours viewed per day

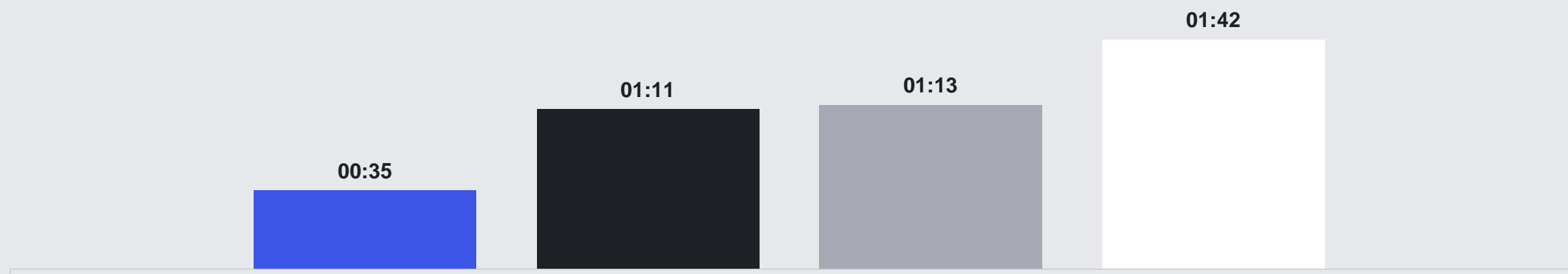
■ 15-24 ■ 25-34 ■ 25-34 with children



Swedish TV viewing increases as they get older and have kids

Average hours viewed per day

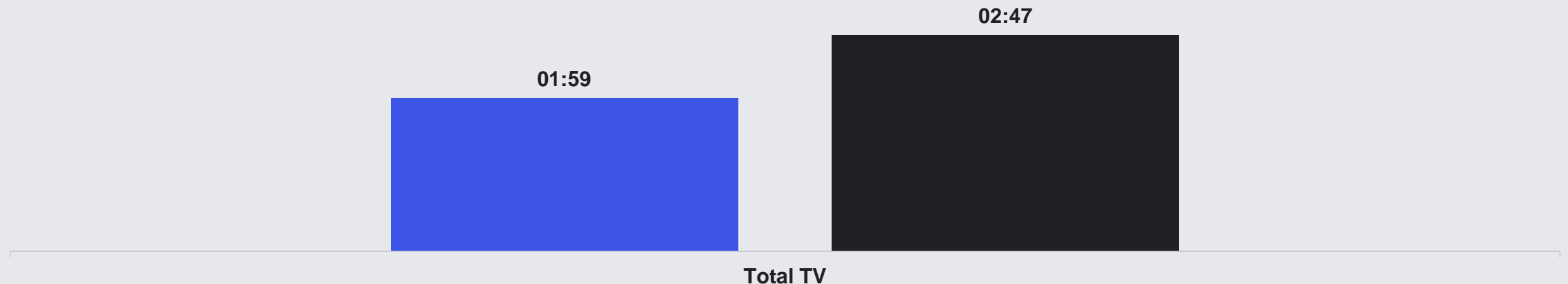
■ 15-24 ■ 25-34 ■ 20+ with children 0-6yrs ■ 20+ with children 7-19yrs



Swiss Millennials' TV viewing increases as they get older

Average hours viewed per day

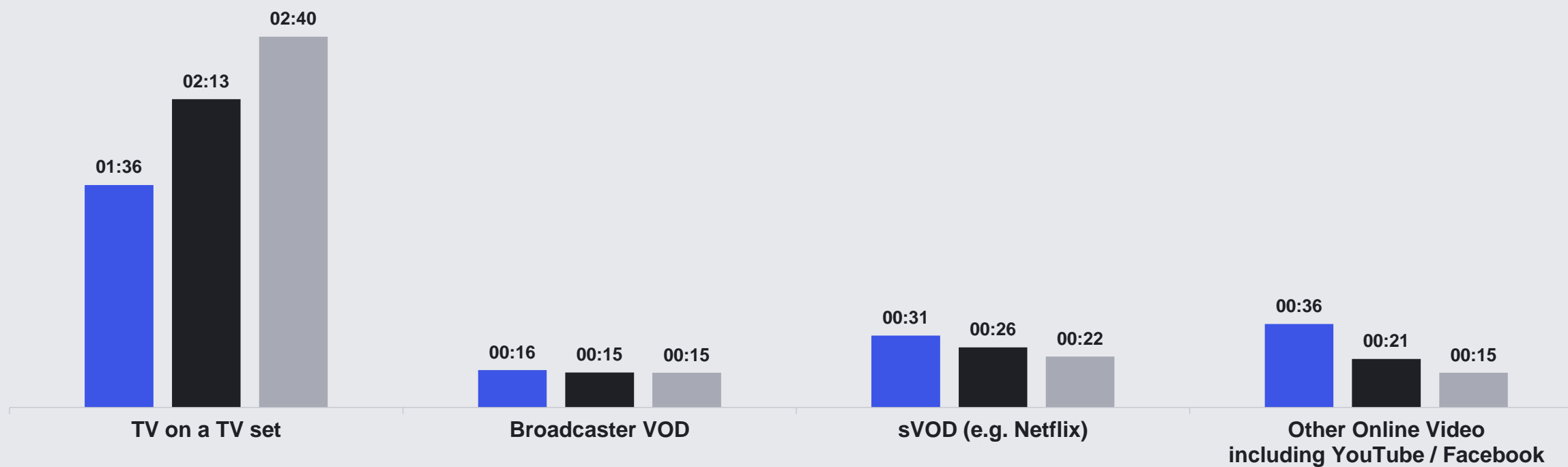
■ 15-24 ■ 25-34



British Millennials' TV viewing increases as they get older and have kids

Average hours viewed per day

■ 16-24 ■ 25-34 ■ 25-34 with children



Ukrainian Millennials' TV viewing increases as they get older

Average hours viewed per day

■ 15-24

■ 25-34

■ 35-44

02:11:43

03:23:18

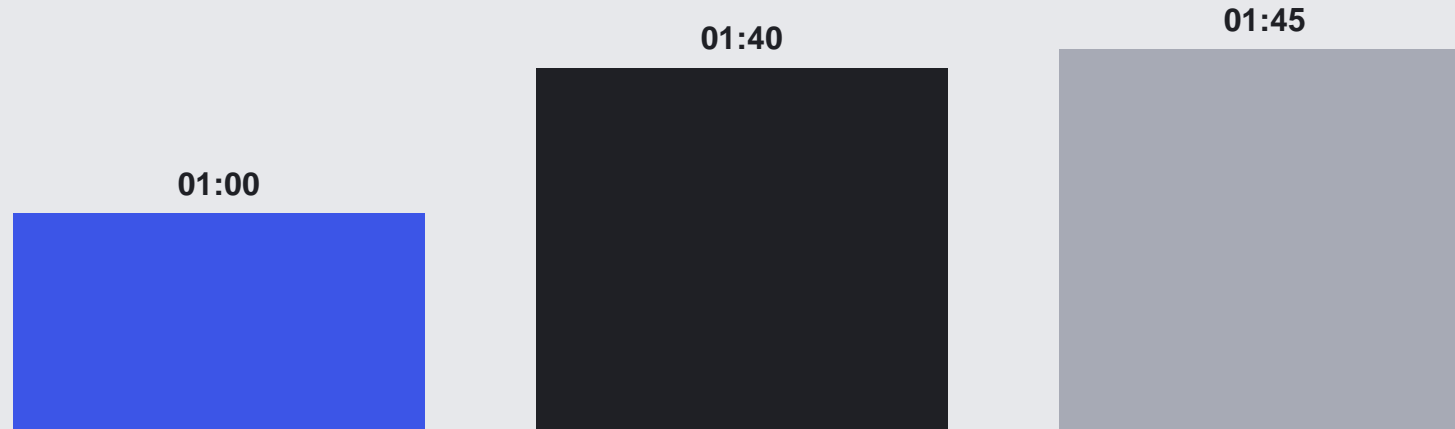
03:51:50

TV

American Millennials' TV viewing increases as they get older and have kids

Average hours viewed per day

■ 15-24 ■ 25-34 ■ 25-34 with children



Popularity

TV has by far the biggest share of attention

“TV remains very important for us. It’s still a very, very important way for us to drive mass reach, and **the right reach** as well. “

Andrew Clarke, CMO of Mars

February 2017

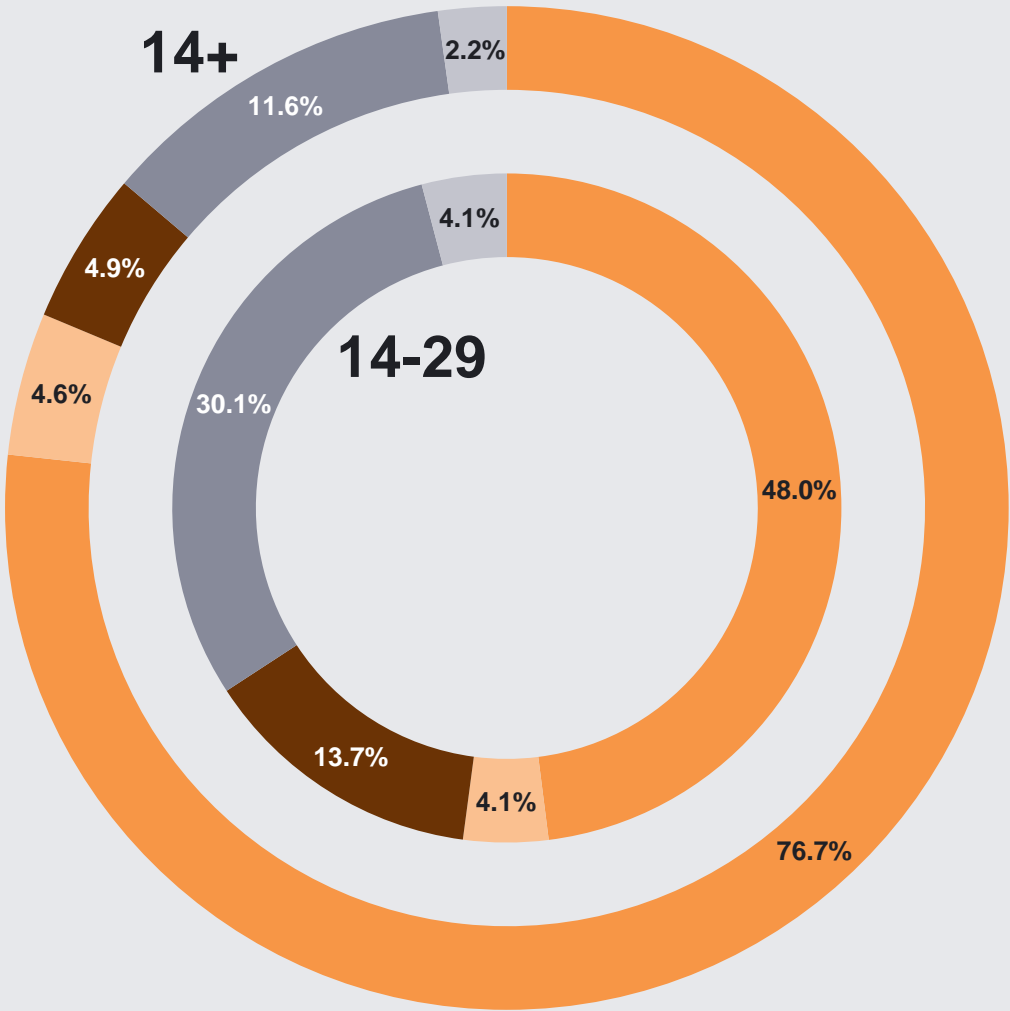
TV is 86% of video time in Austria

Average video time per day

Adults 14+: 225 minutes

14-29: 212 minutes

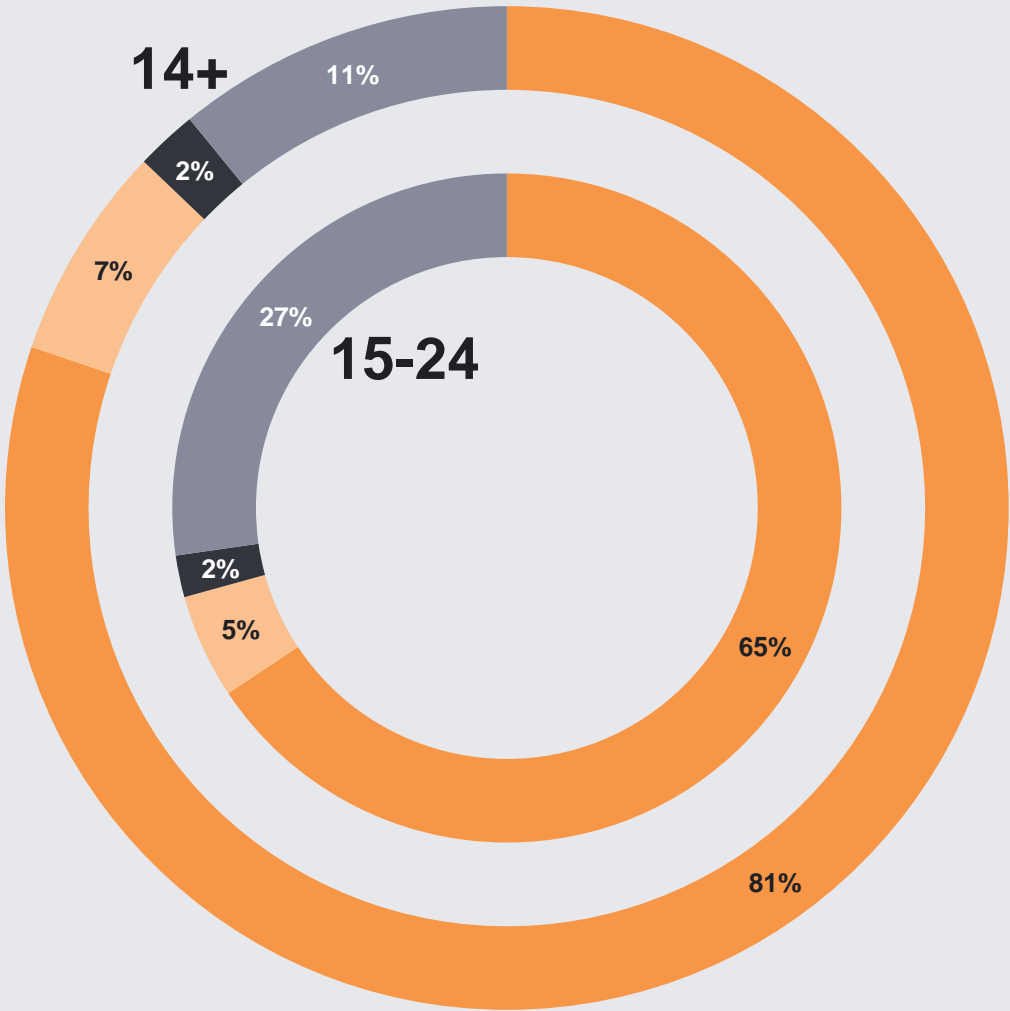
- Live TV
- Playback TV
- Broadcaster VOD
- Other online video
- DVD



TV is 88% of video time in Finland

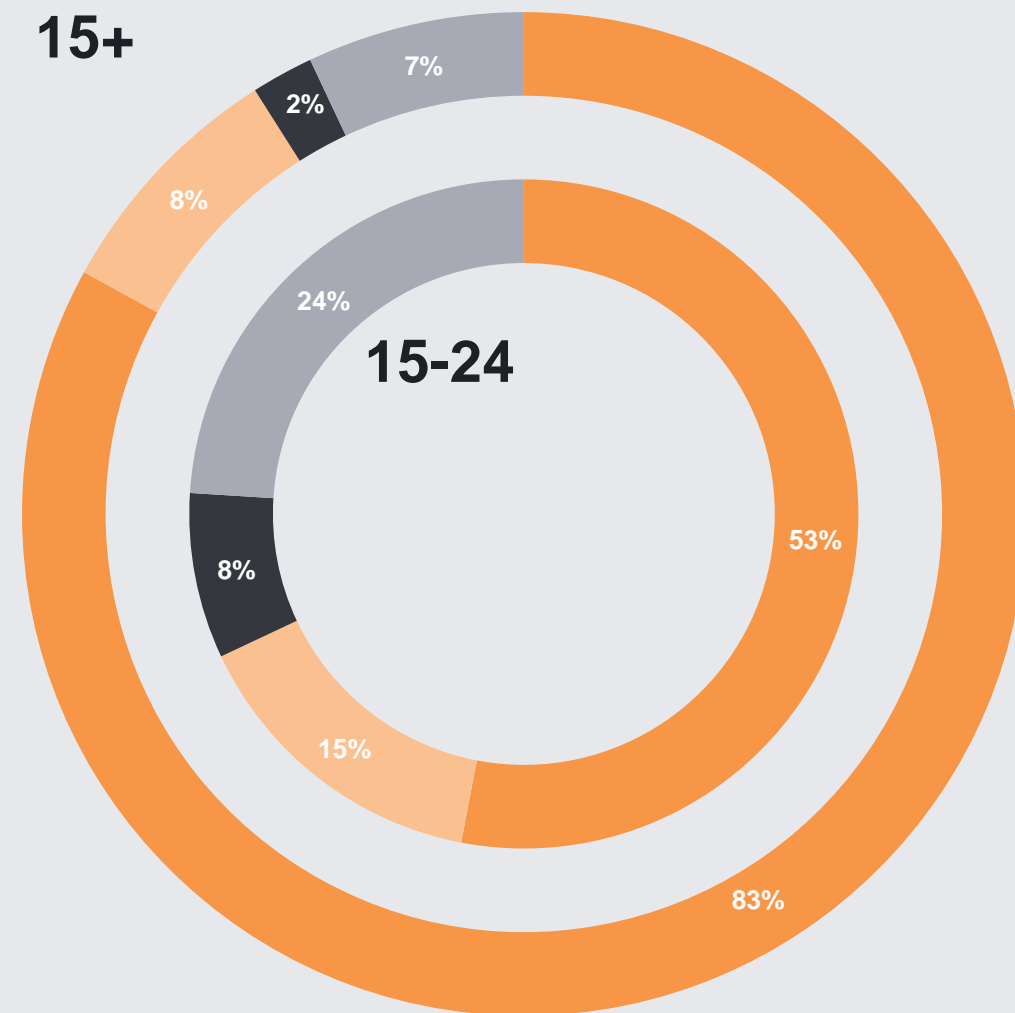
Average video time per day
All individuals: 172 minutes

- Live TV
- Time-shifted viewing 1-7 days
- DVD / Blu-ray / VHS
- Other TV screen use



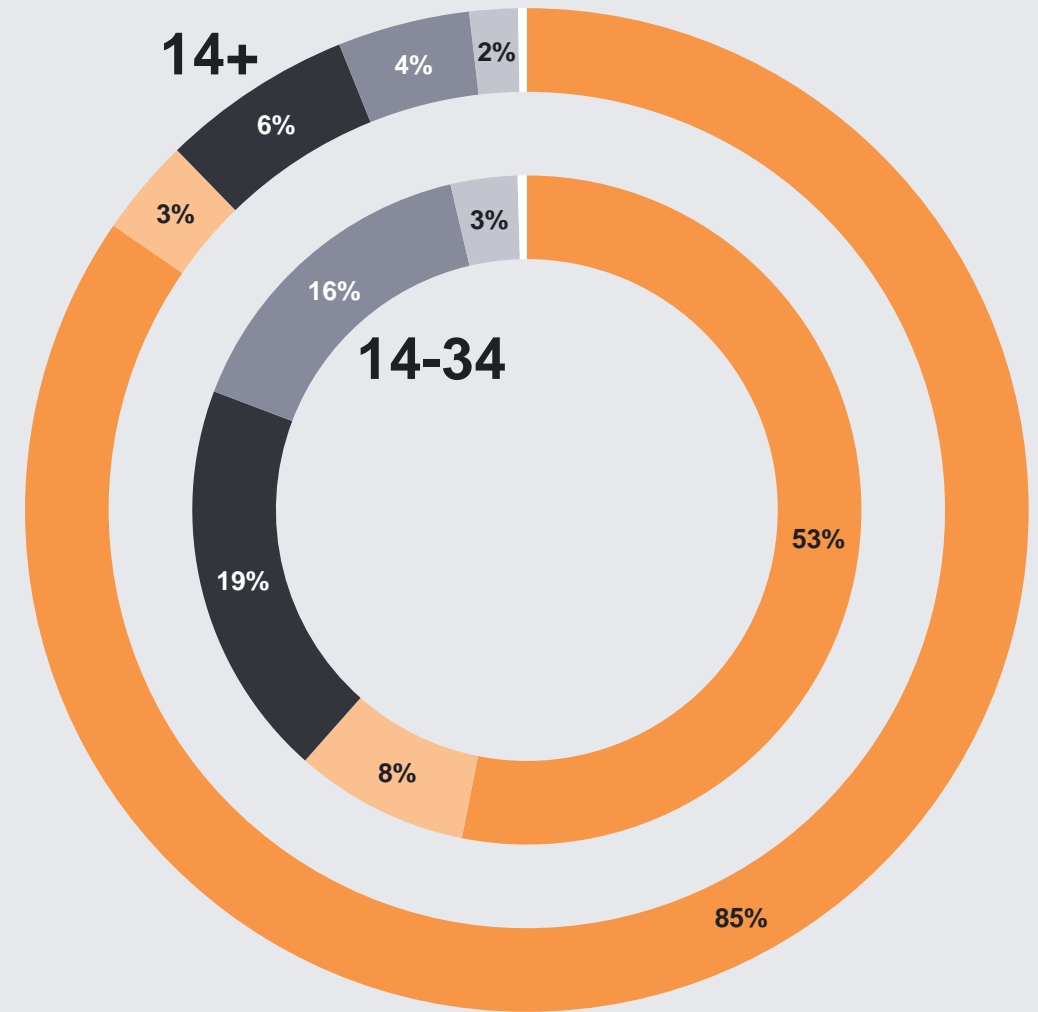
TV is 91% of video time in France

- Live TV
- Other TV viewing (tsv + catch-up + Live TV on other screens)
- VOD/SVOD
- Other videos on the internet or IPTV



TV is 88% of video time in Germany

- TV classic
- TV via alternative access
- Free online video
- Pay VoD
- DVD/Blu-ray
- Cinema



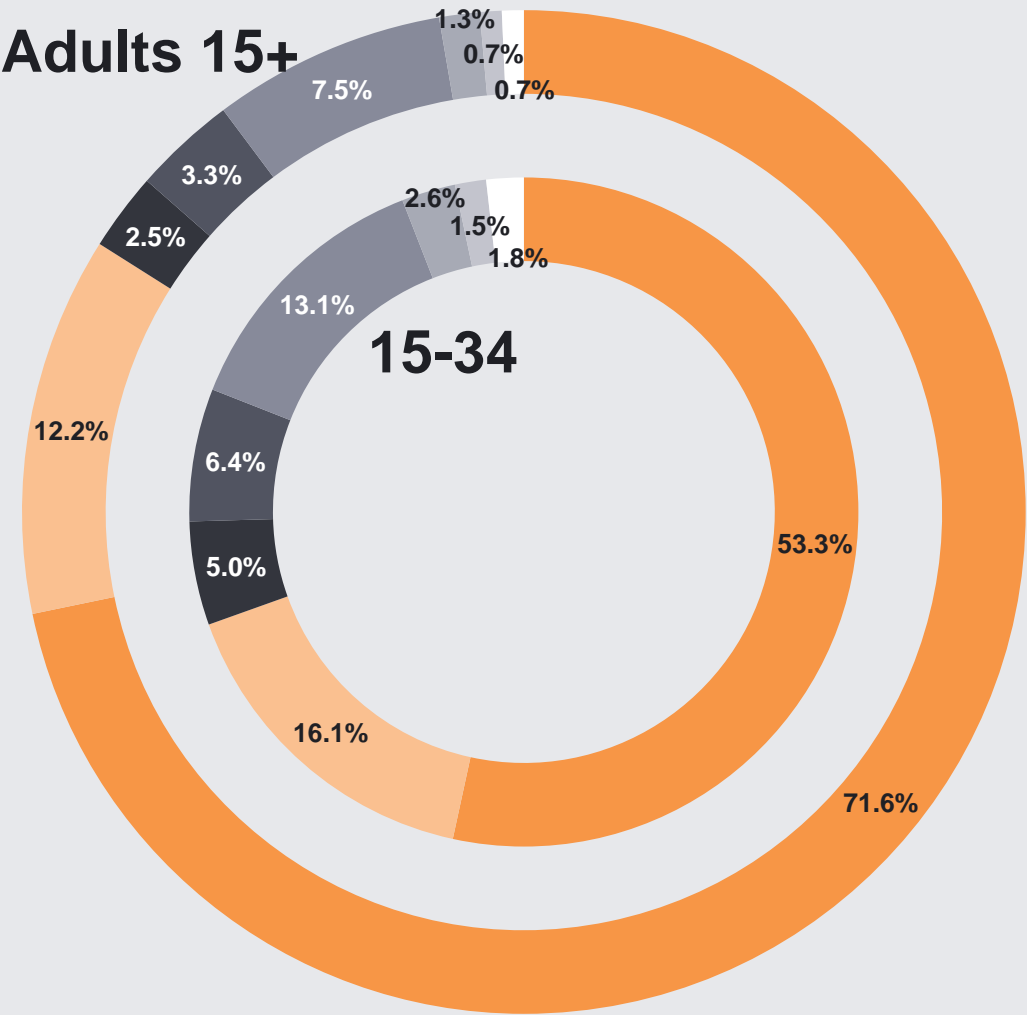
TV is 84% of video time in Ireland

Average video time per day

Adults 15+: 221 minutes

15-34: 212 minutes

- Live TV
- Recorded TV
- NET "On Demand" / From Players
- Stand alone video service / Paid for service
- Short form video
- DVD
- Pay Per view Sports
- Other Internet



TV is 94% of video time in Italy

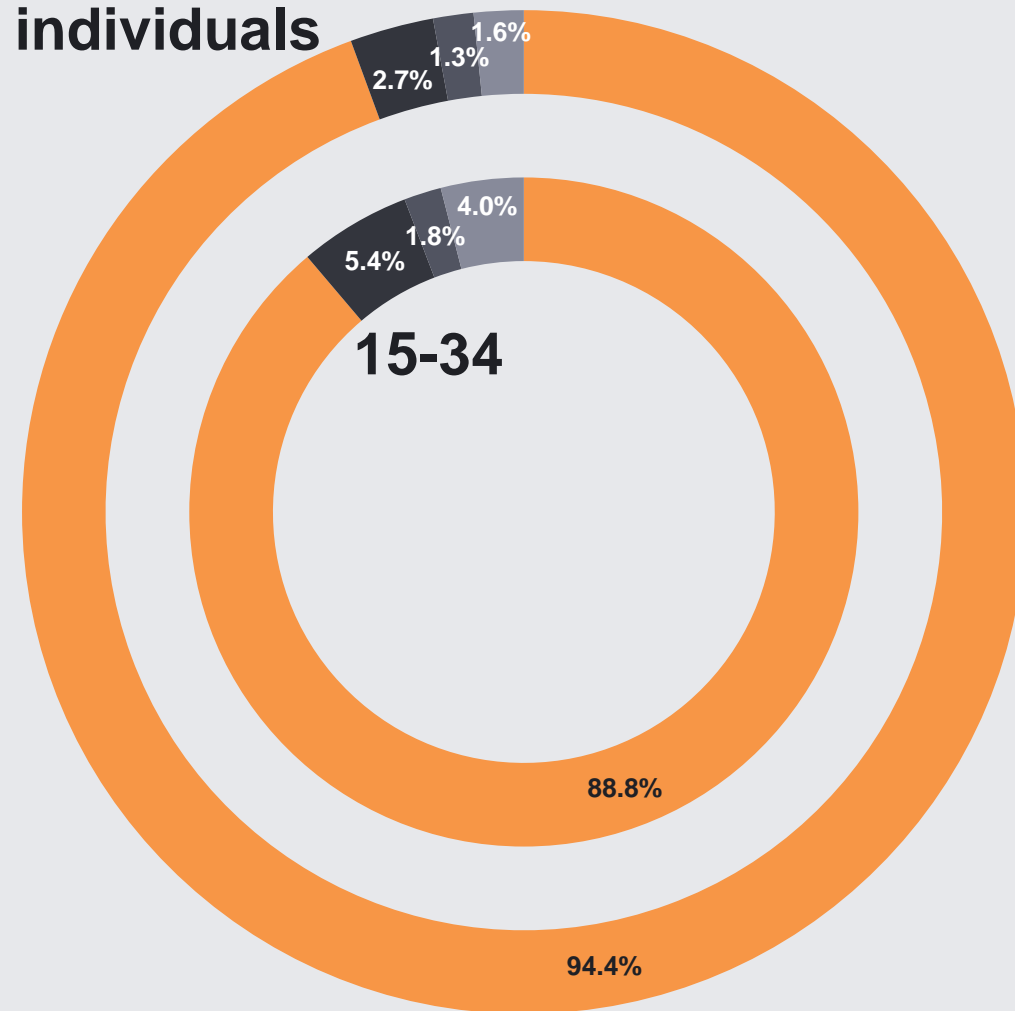
Average video time per day

All individuals: 292 minutes

15-34: 180 minutes

- TV
- YouTube
- Facebook
- Other

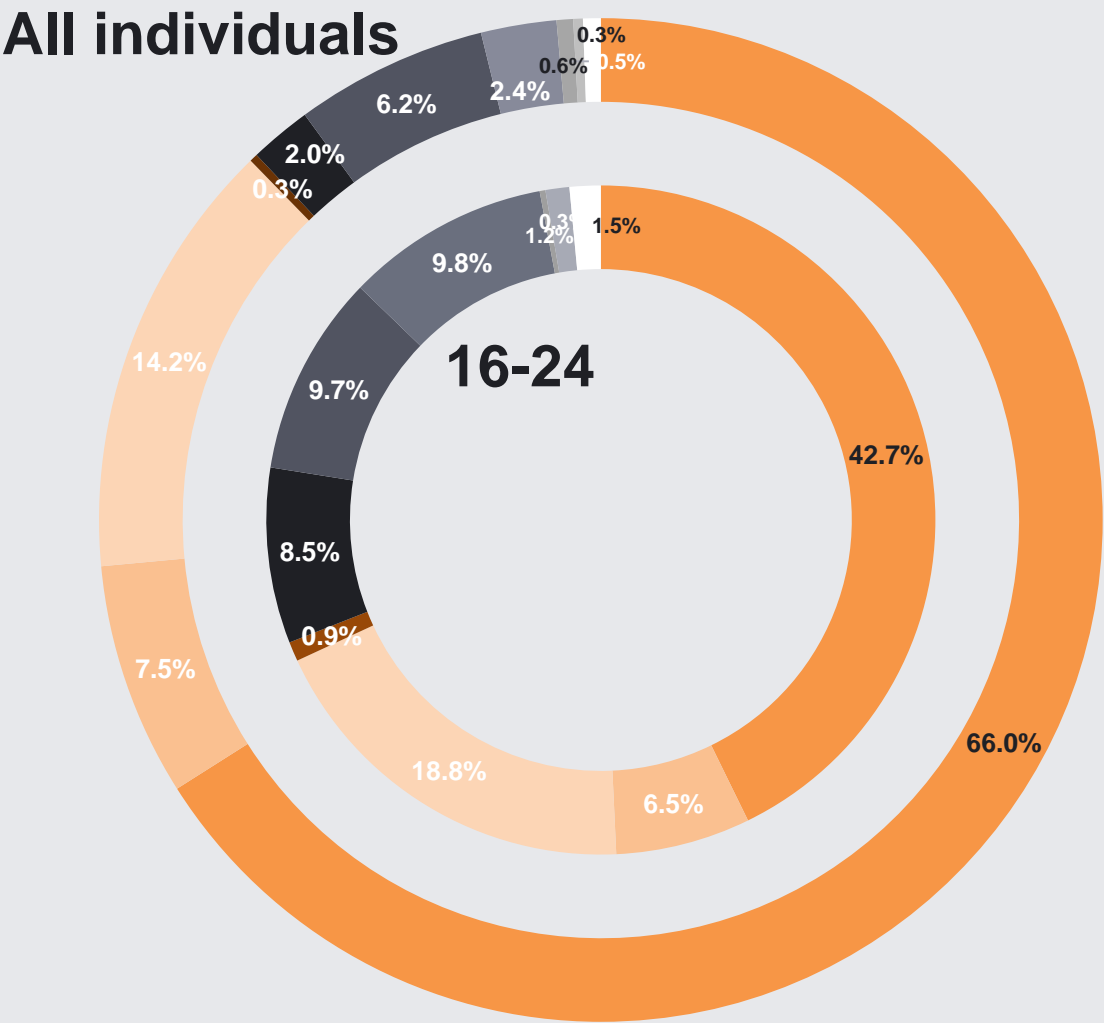
All individuals



TV is 88% of video time in the Netherlands

Average video time per day
All individuals 13+: 225 minutes
16-24: 138 minutes

- Live TV
- Playback/catch-up TV
- Other TV content
- Broadcaster VOD
- YouTube
- Facebook
- Other online video
- Online 'adult' XXX video
- Cinema
- Subscription VOD

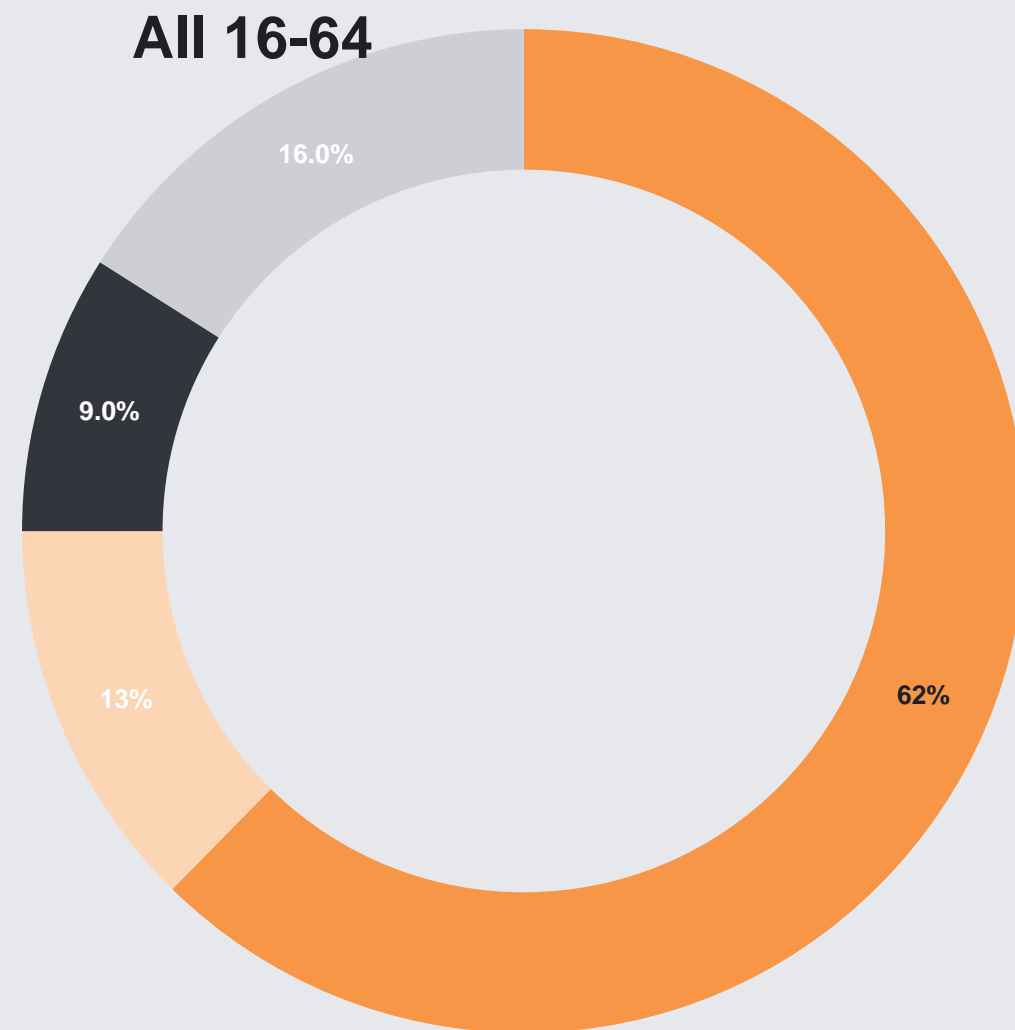


TV is 75% of video time in Poland

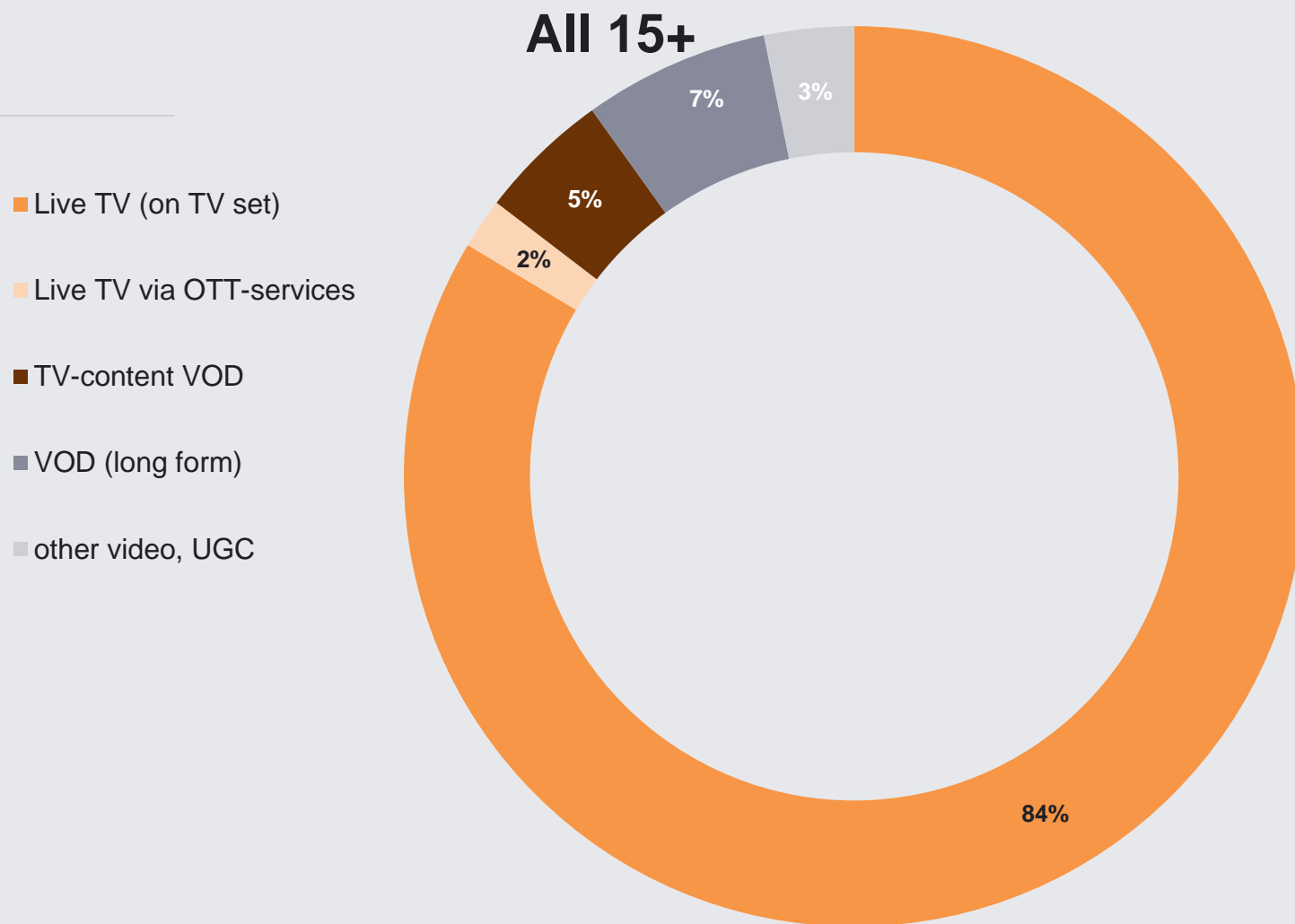
Average video time per day

All 16-64 = 229 mins

- Live TV
- TSV+BVOD
- SVOD
- YouTube



TV is 91% of video time in Russia



TV is 67% of video time in Sweden

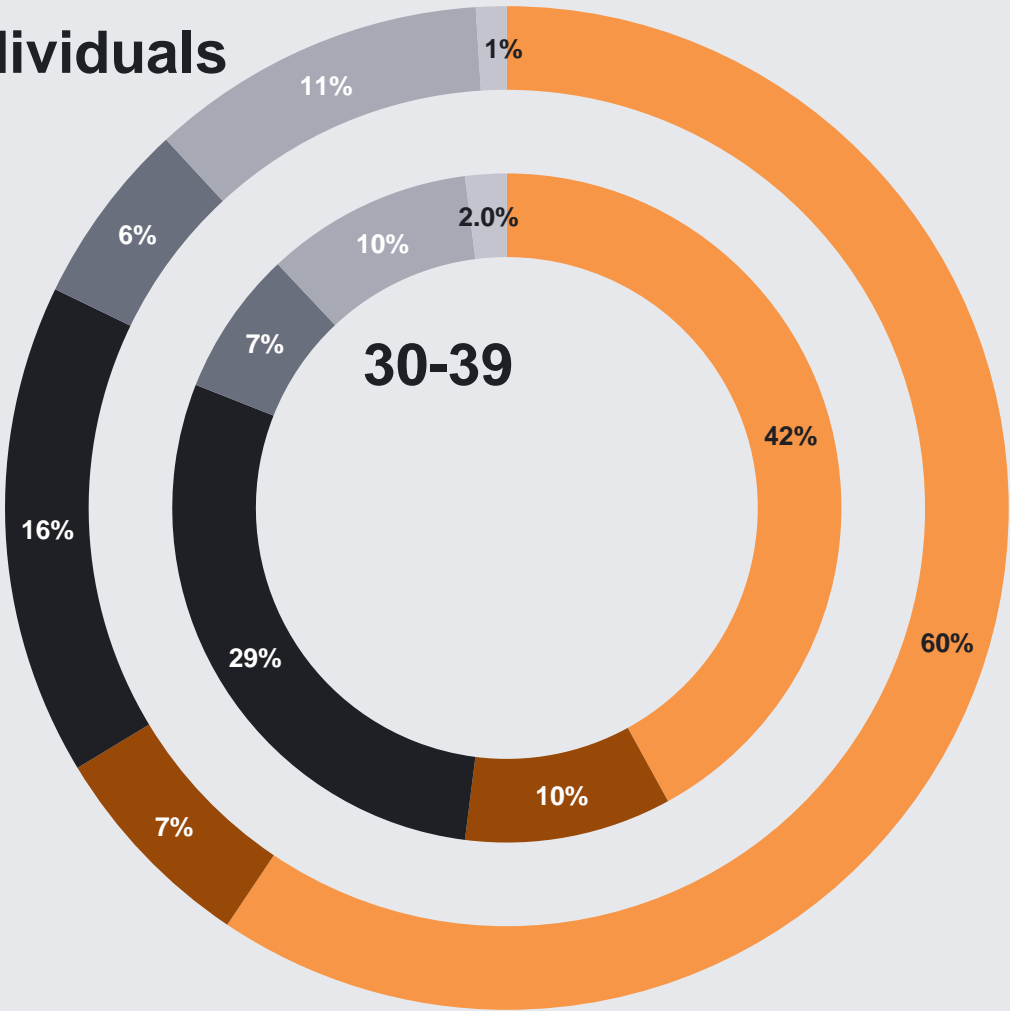
Average video time per day

All individuals: 218 minutes

30-39: 212 minutes

- Live TV
- Broadcaster AVOD
- Subscription VOD
- Social media video
- YouTube
- Other online video

All individuals



TV is 97% of video time in Switzerland

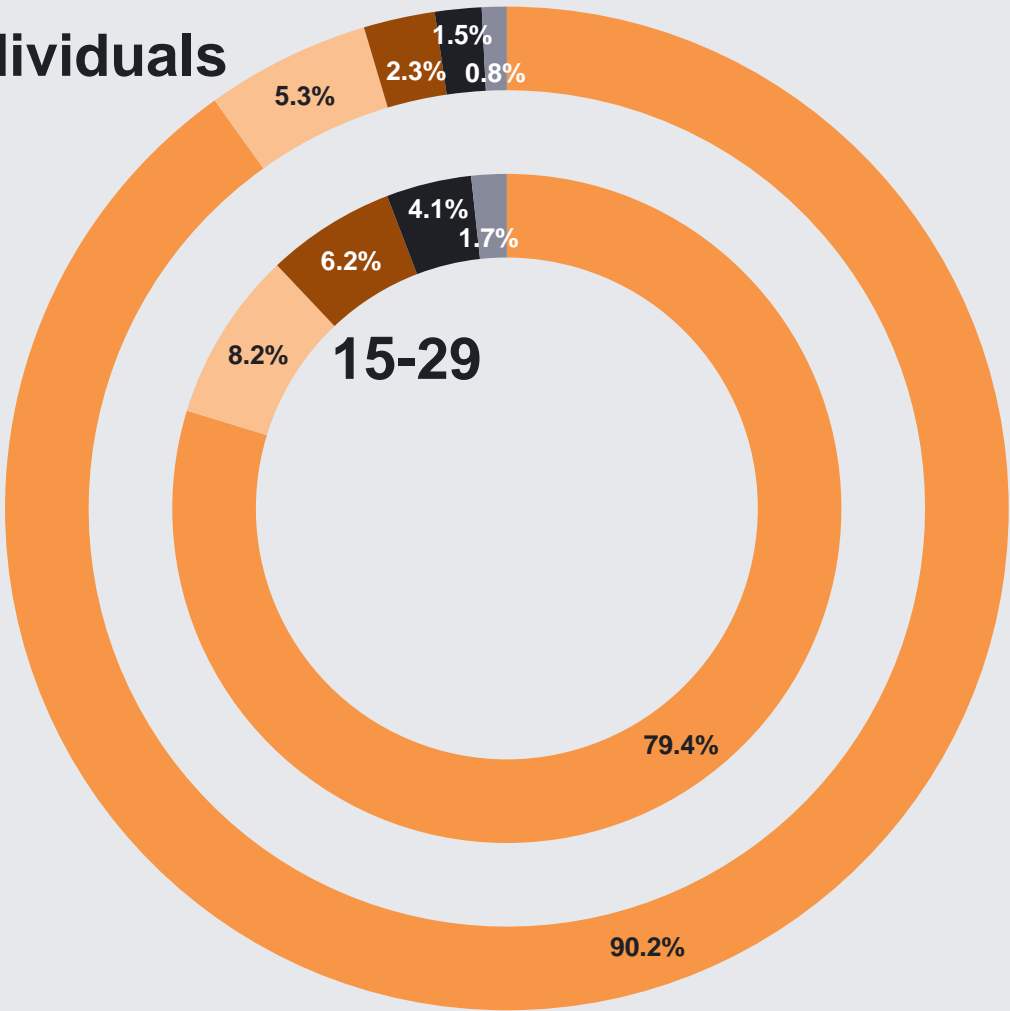
Average video time per day

All individuals: 132 minutes

15-29: 97 minutes

- Live TV
- Playback TV
- Broadcaster VOD
- Other online video
- Cinema

All individuals



TV is 71% of video time in the UK

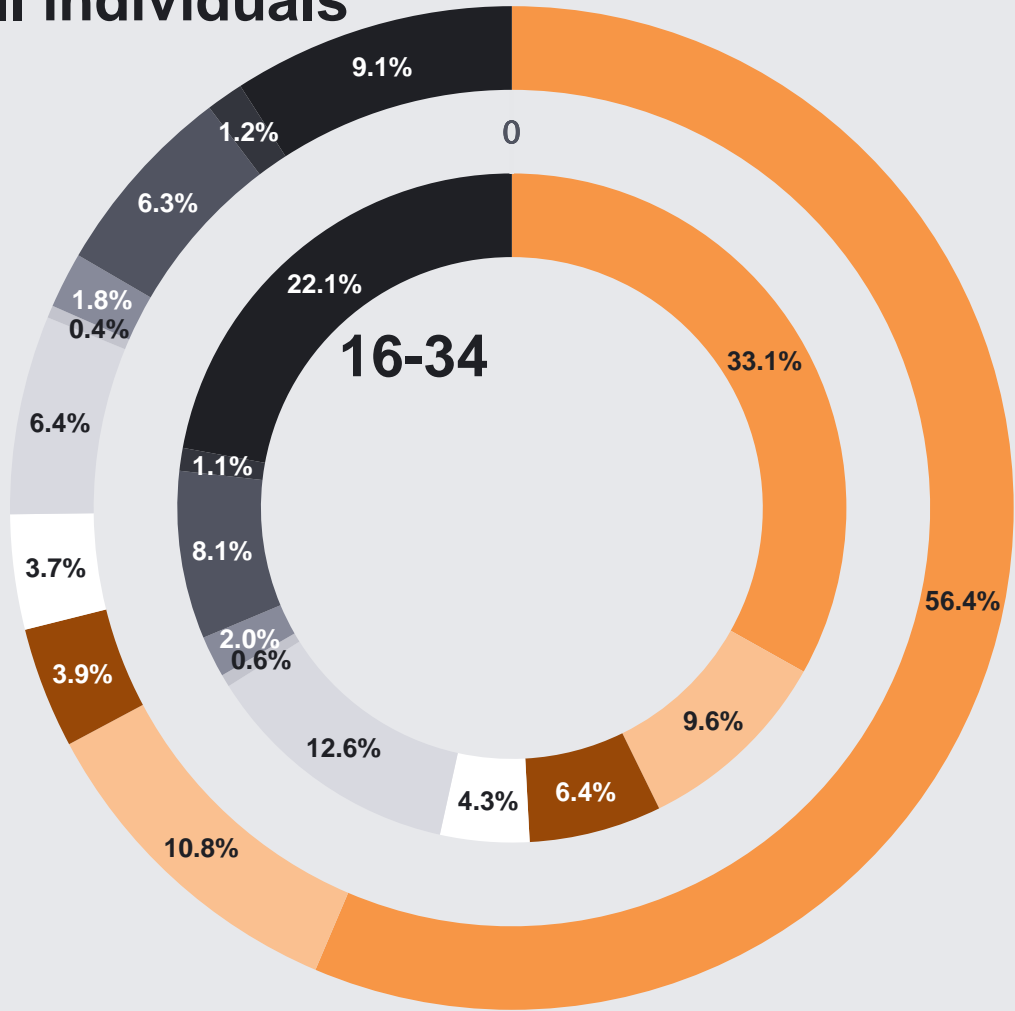
Average video time per day

All individuals: 279 minutes

16-34: 259 minutes

- Live TV
- Playback TV
- Broadcaster VOD
- DVD
- Subscription VOD
- Cinema
- Online 'adult' XXX video
- Other online video
- Facebook
- YouTube

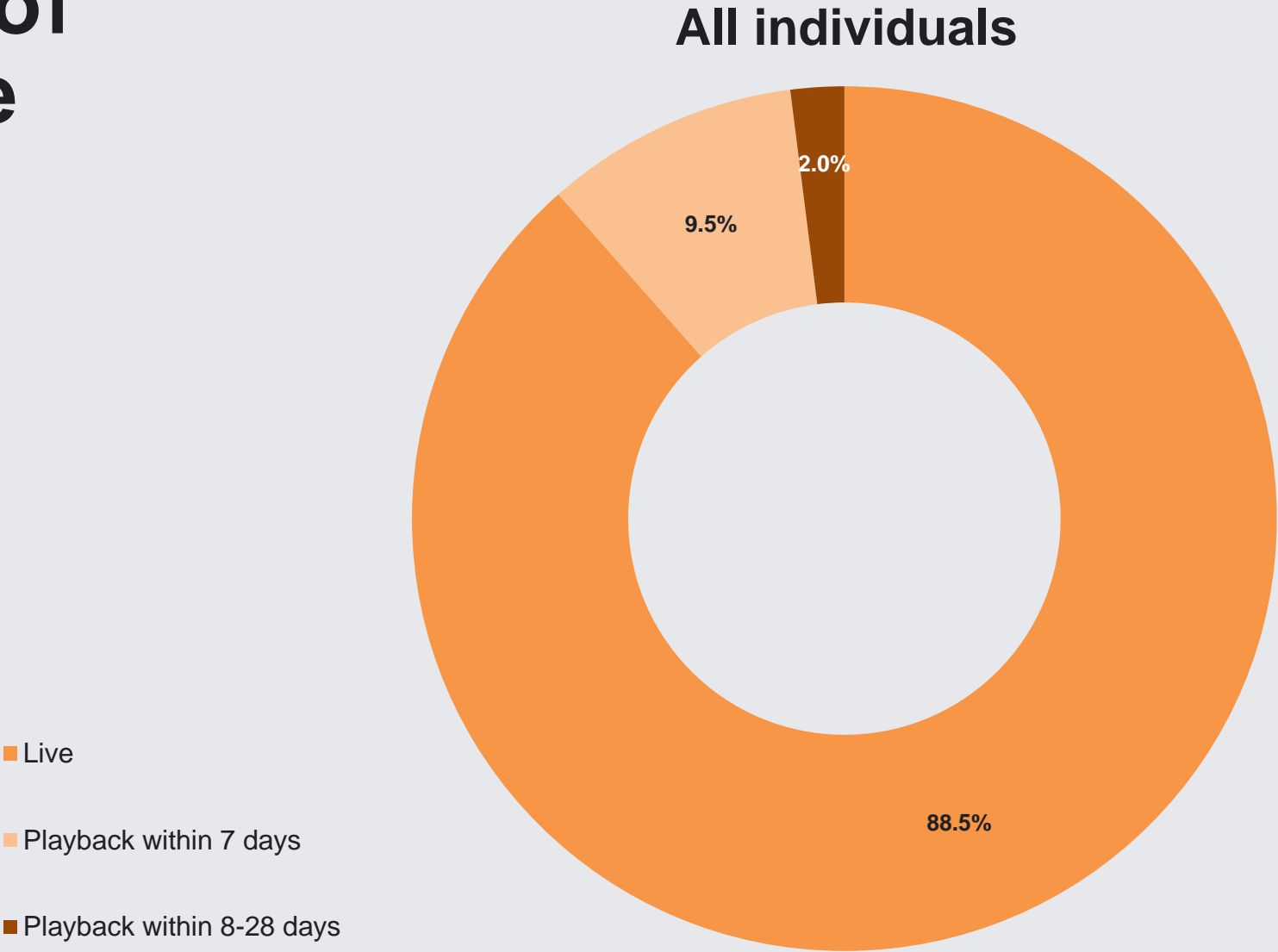
All individuals



**On top of being the
world's favourite
form of video, the
majority of TV
viewing is live**

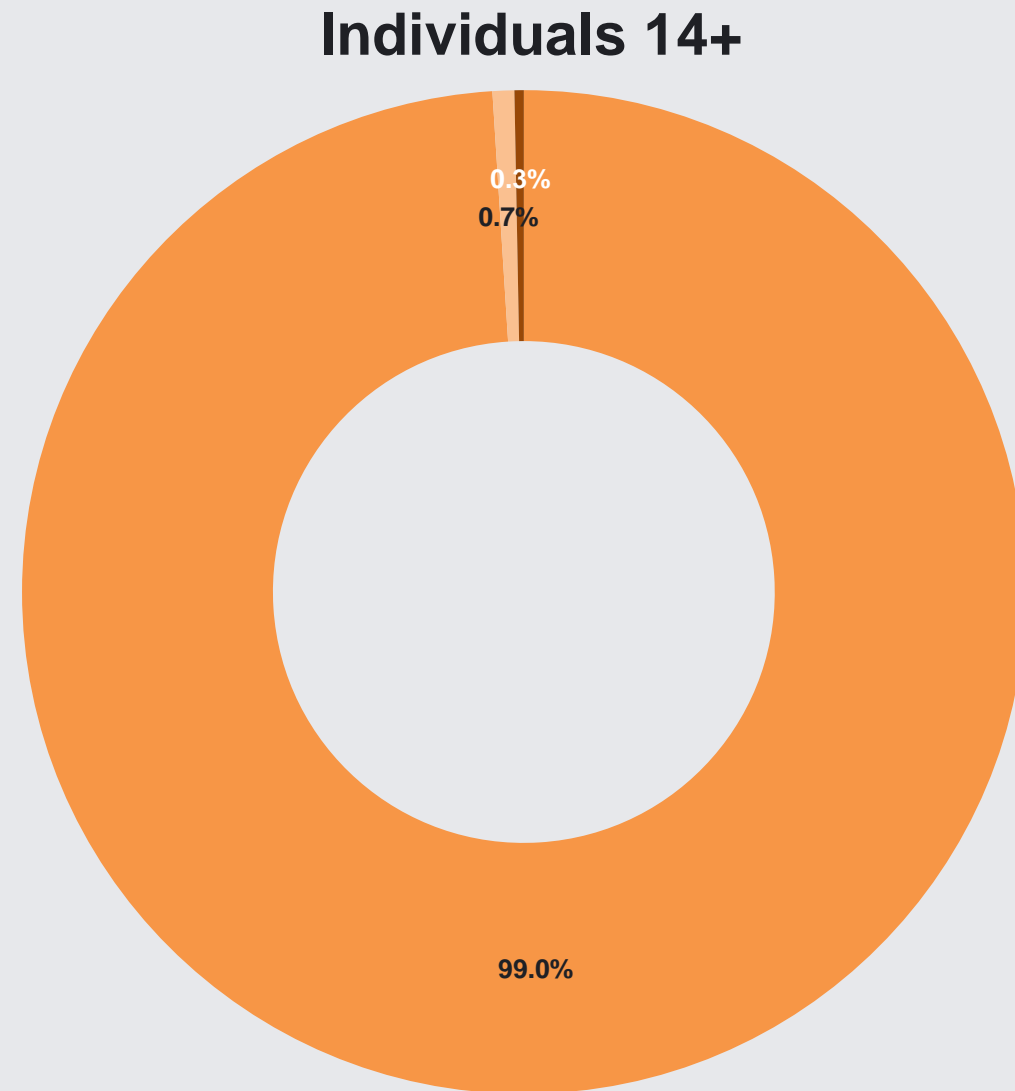


In Australia, 89% of TV is watched live

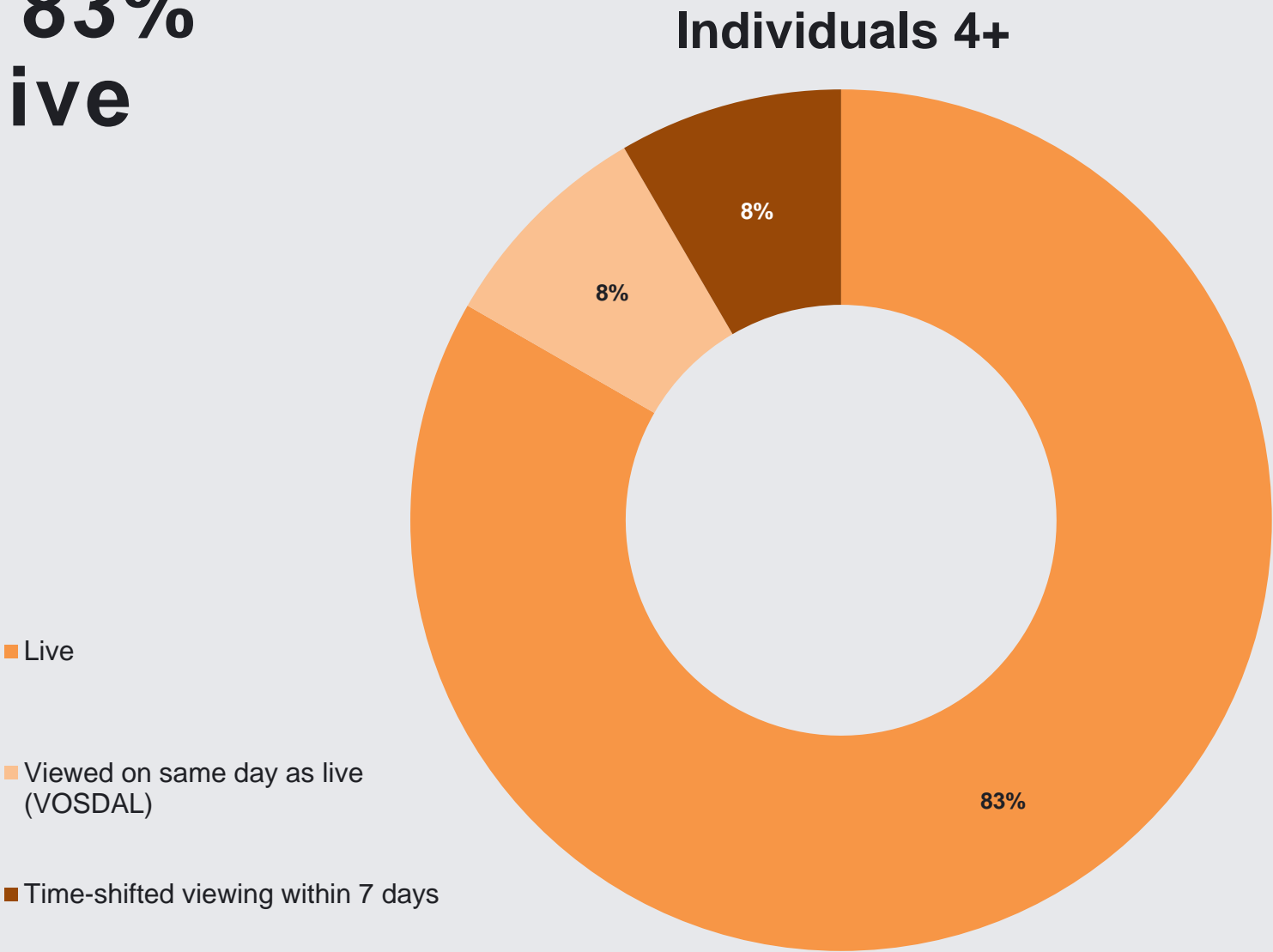


In Austria, 99% of TV is watched live

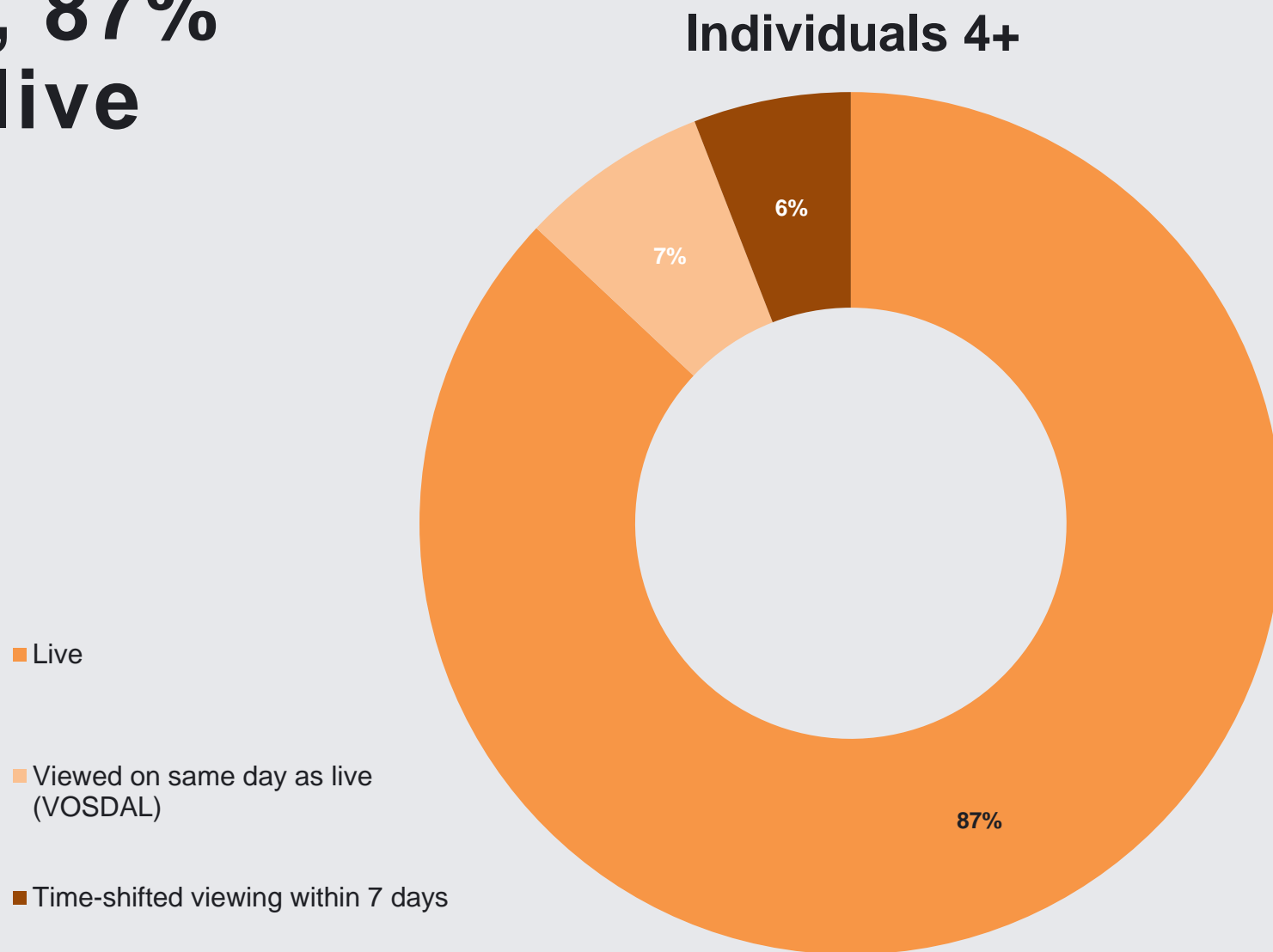
- Live
- Viewed on the same day as live (VOSDAL)
- Timeshifted viewing within 7 days



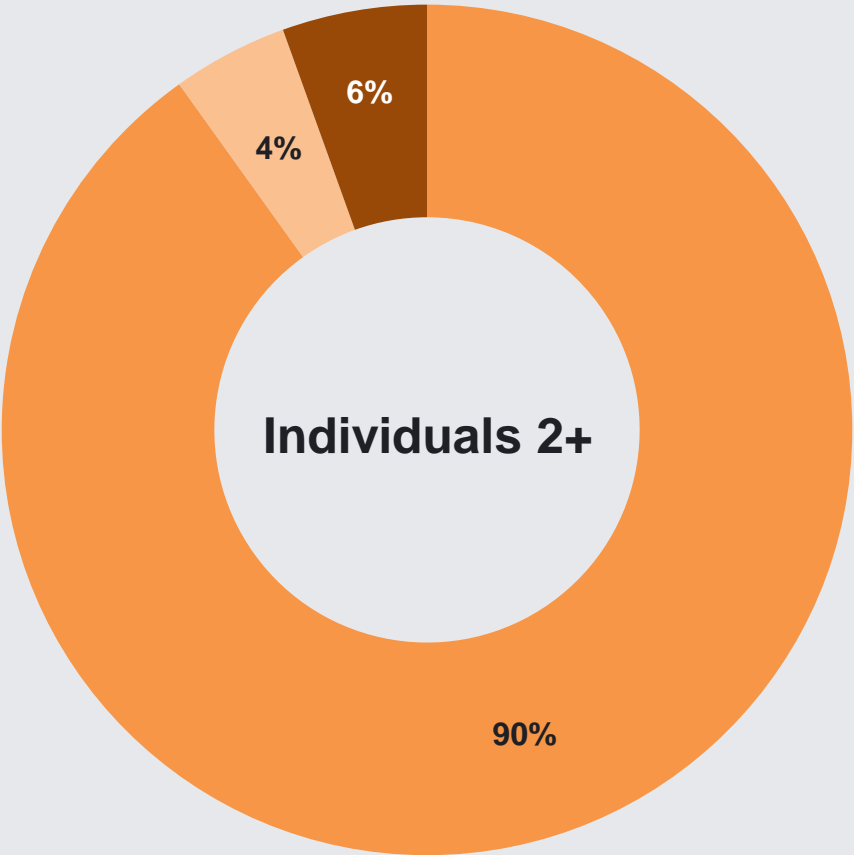
In Belgium North, 83% of TV is watched live



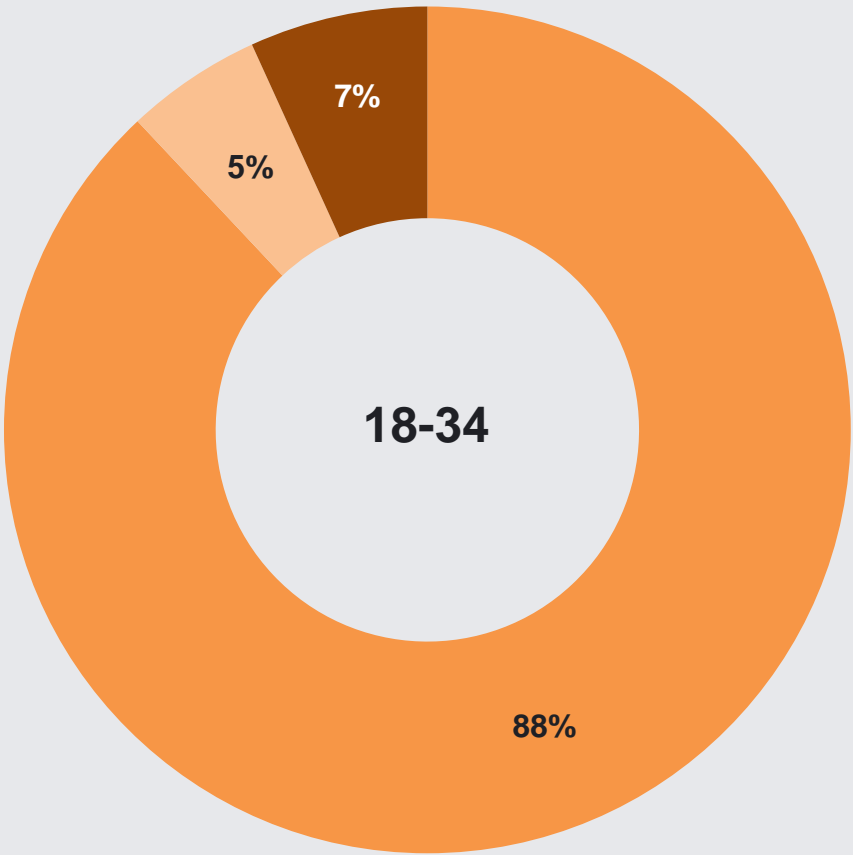
In Belgium South, 87% of TV is watched live



In Canada, 90% of TV is watched live



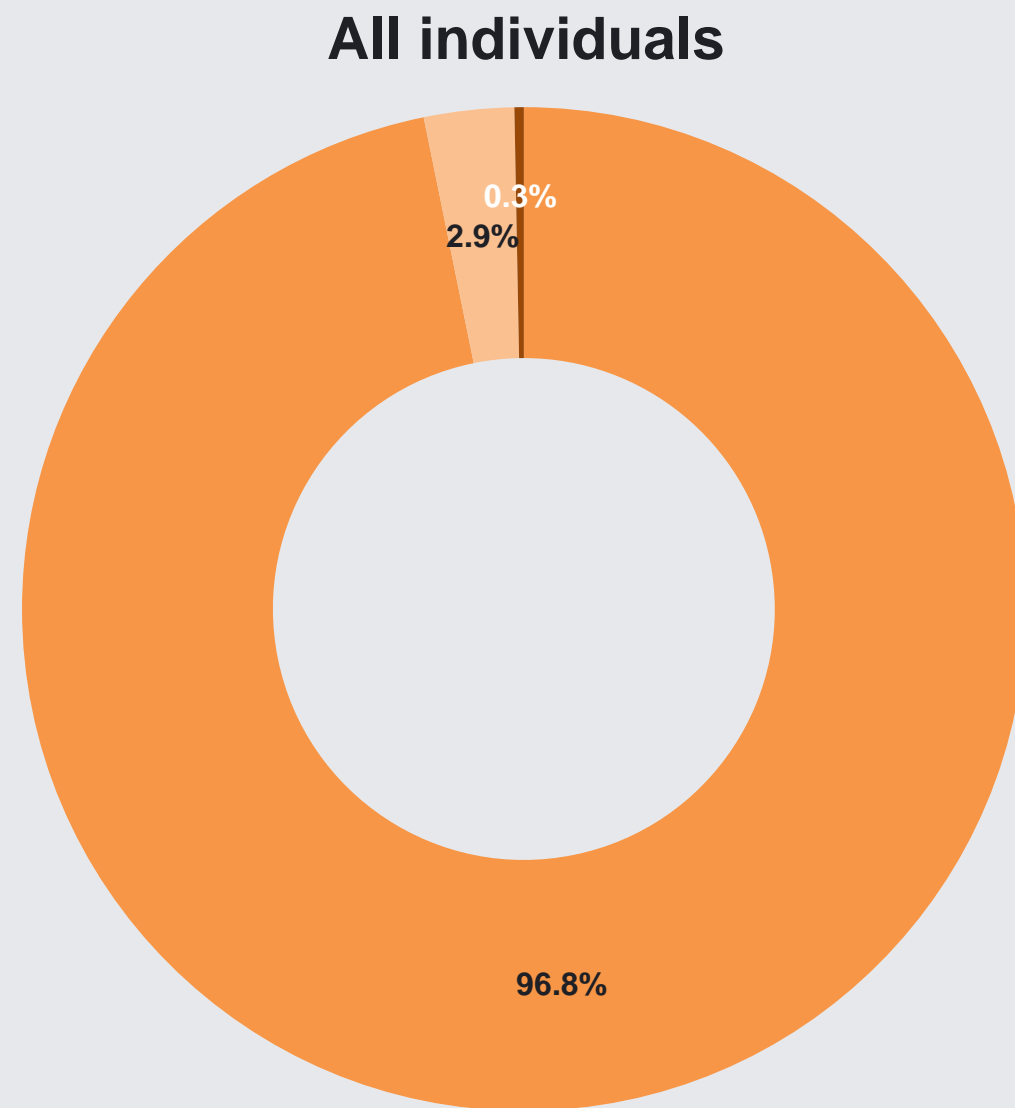
■ Live ■ Same Day Play Back ■ Playback 1-7 days



■ Live ■ Same Day Play Back ■ Playback 1-7 days

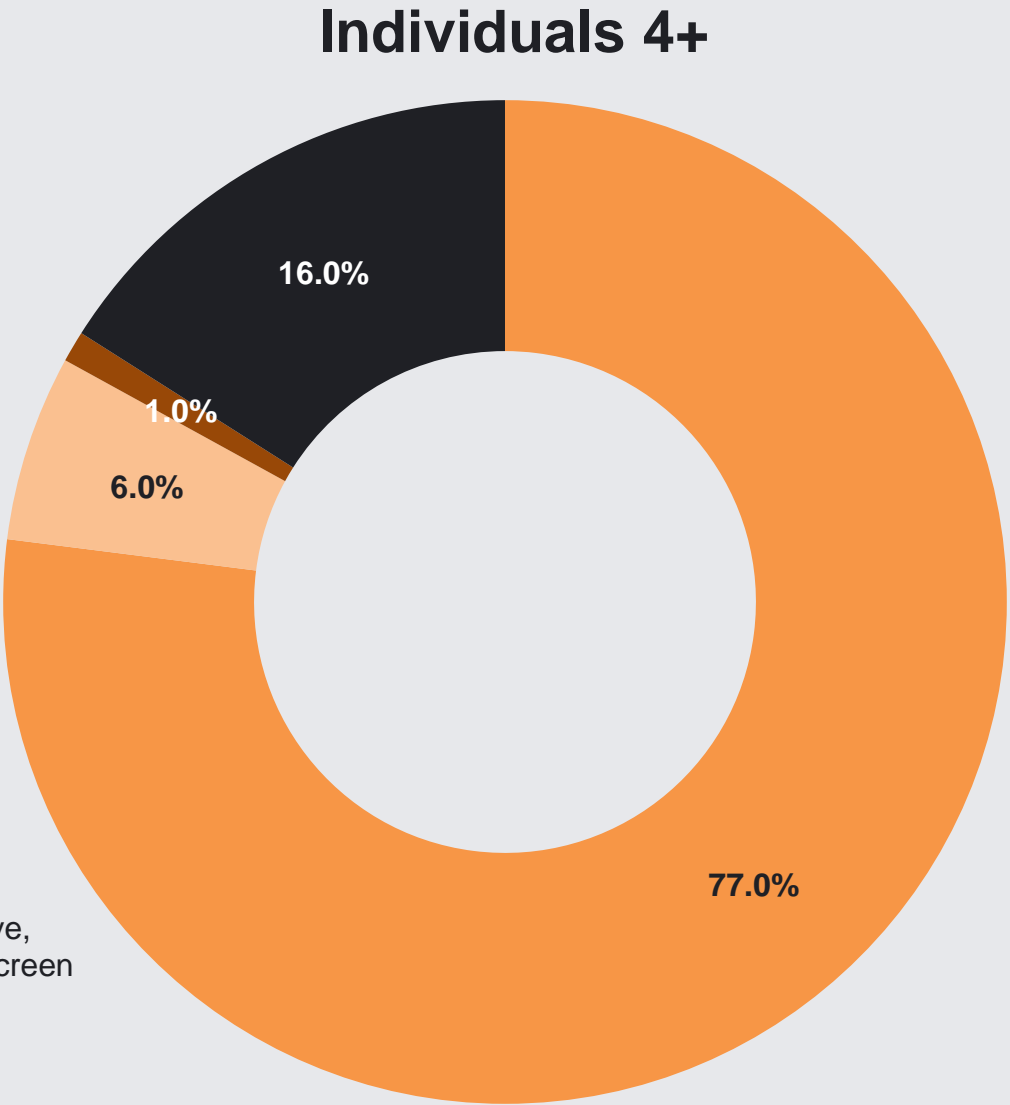
In Czech Republic, 97% of TV is watched live

- Live
- Playback within 0-3 days
- Playback within 4-7 days

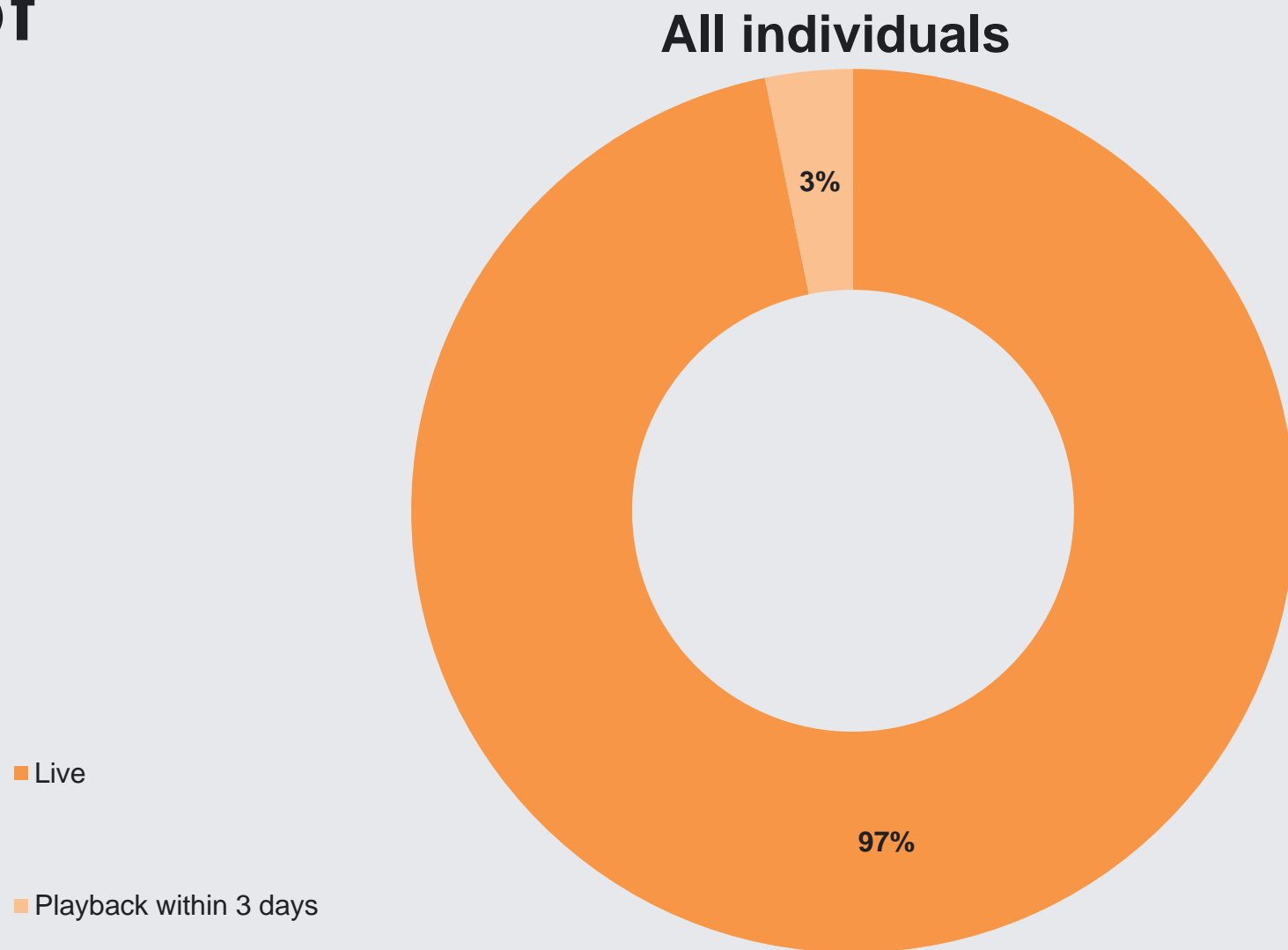


In Finland, 77% of TV is watched live

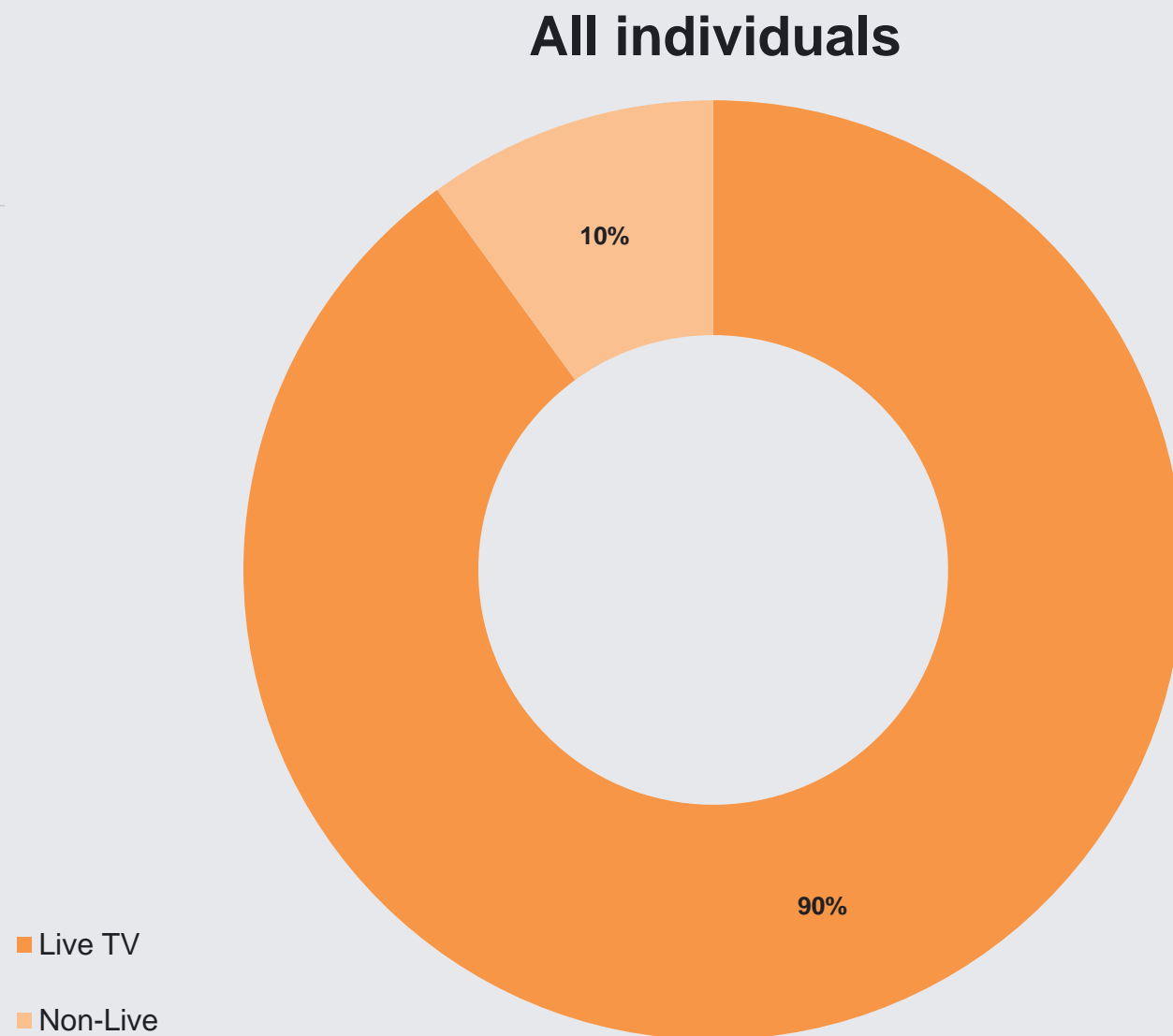
- Live TV
- TSV
- Other: TSV over 7 days from live, VHS, SVOD, other use of TV screen
- PC + mobile*



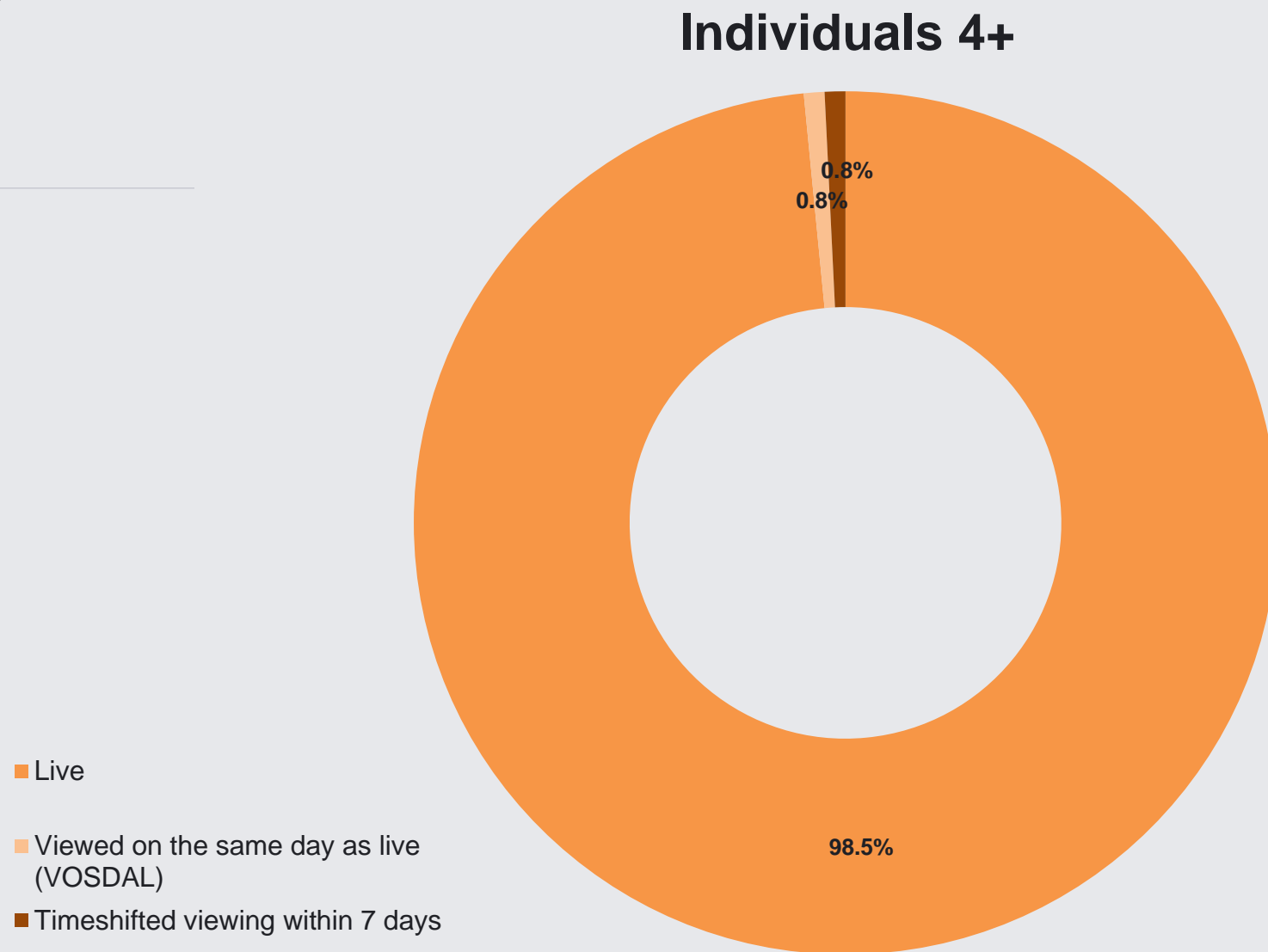
In Germany, 97% of TV is watched live



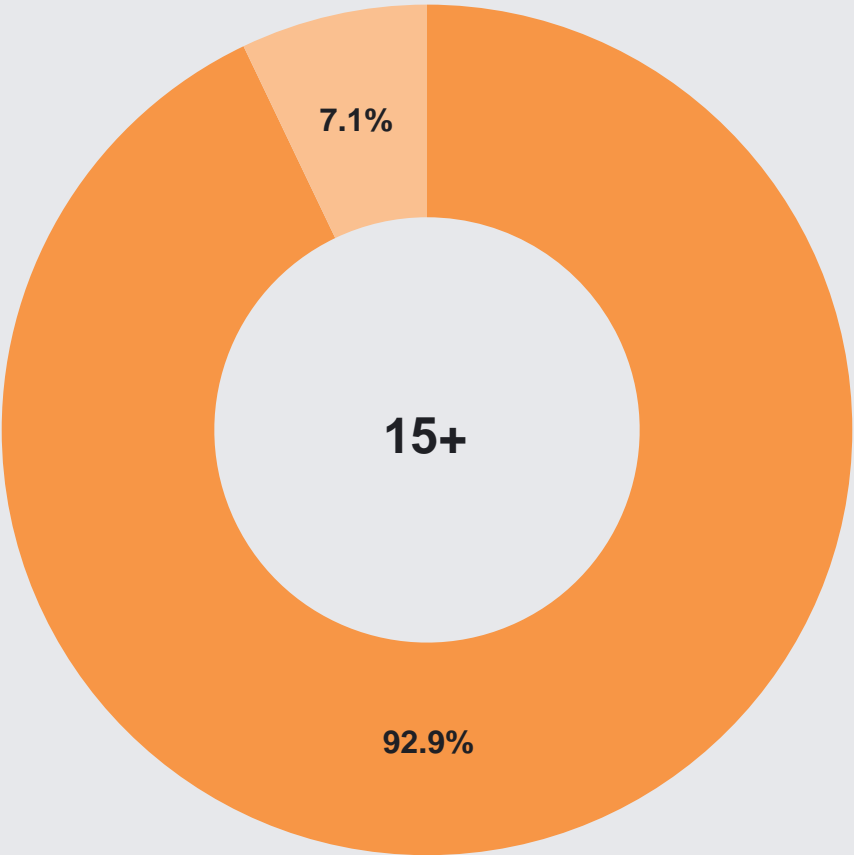
In Ireland, 90% of TV is watched live



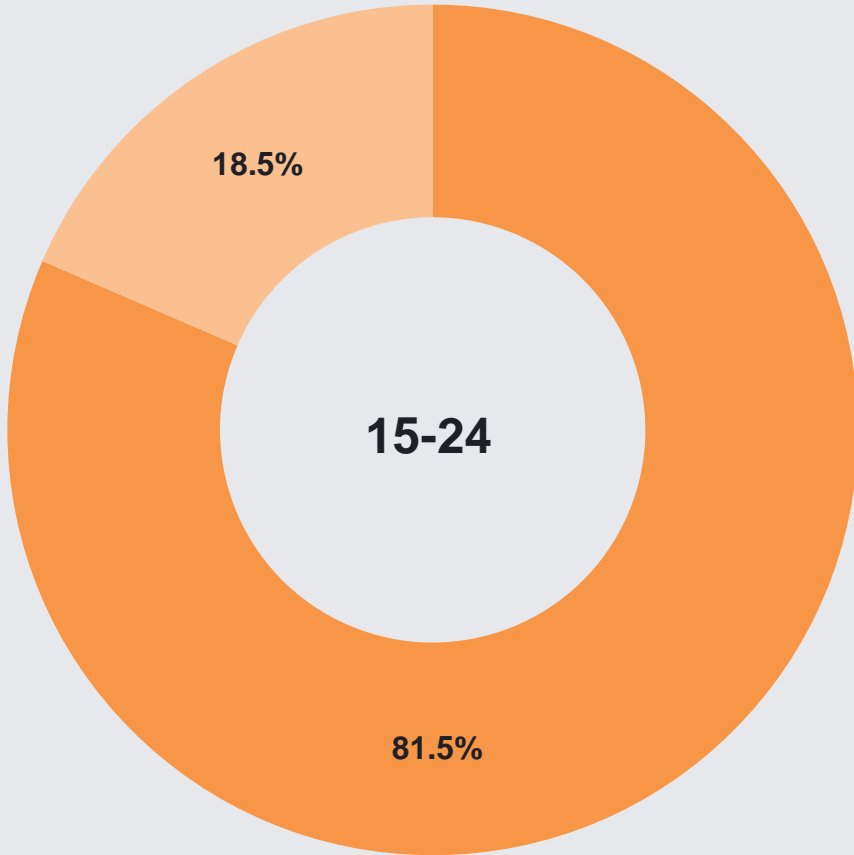
In Italy, 99% of TV is watched live



In France, 93% of TV is watched live

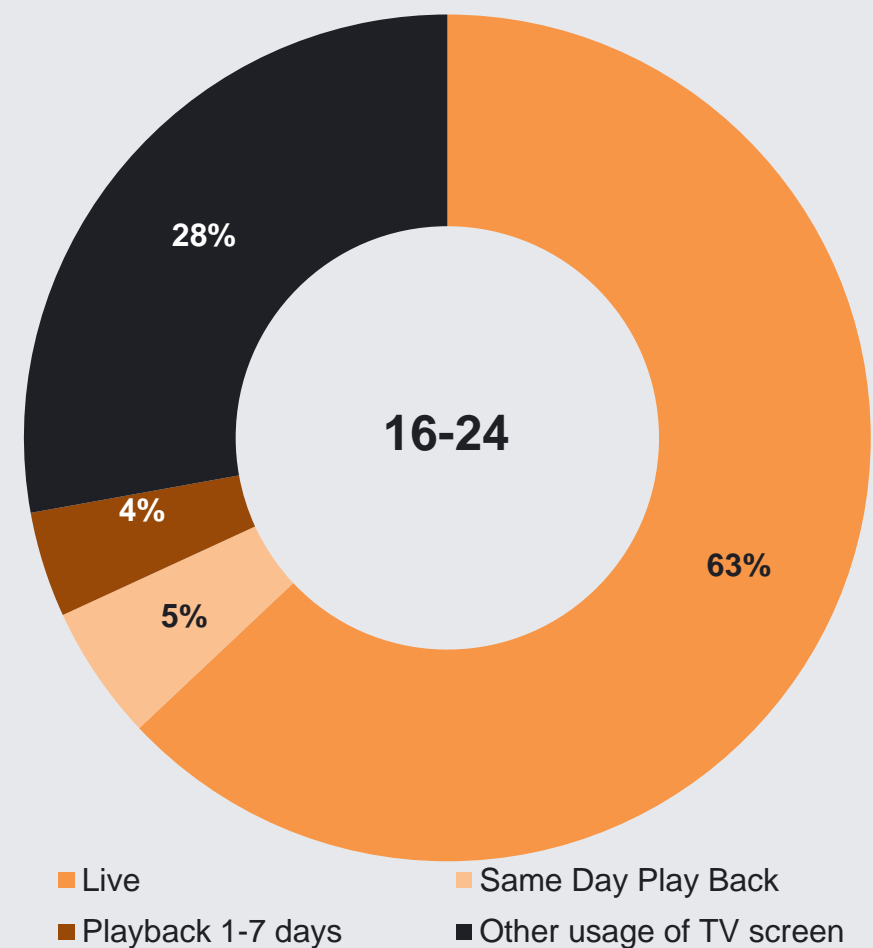
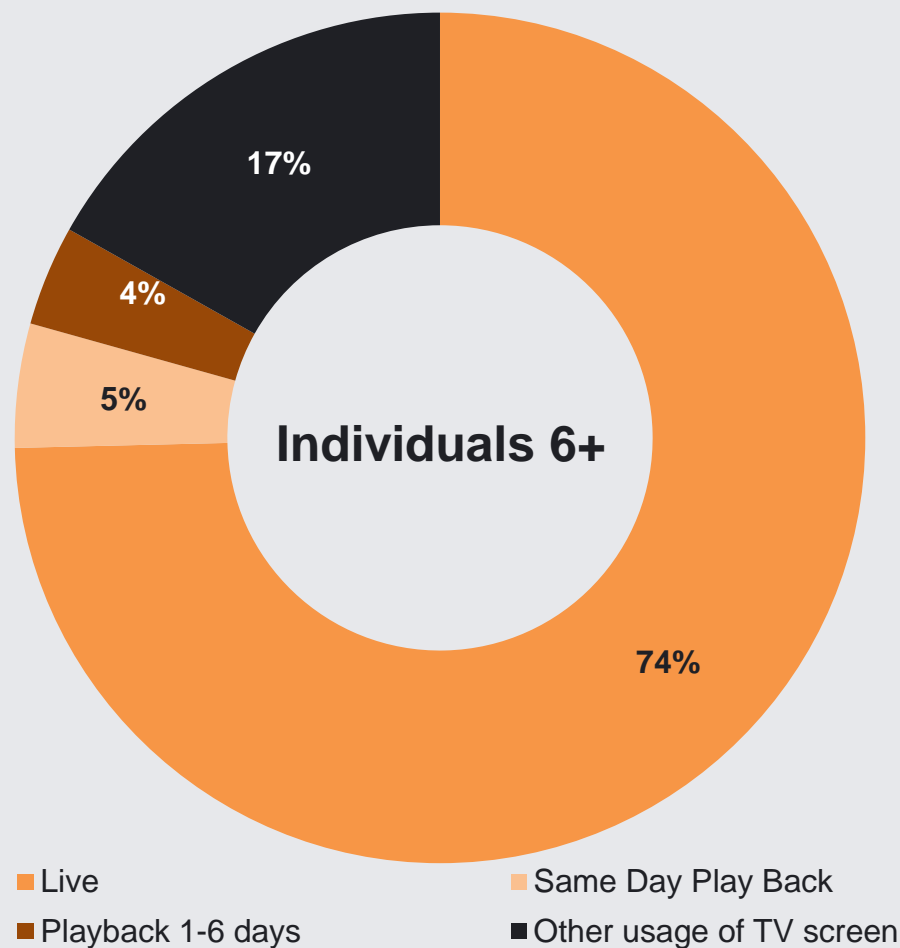


■ Live TV ■ Non-live

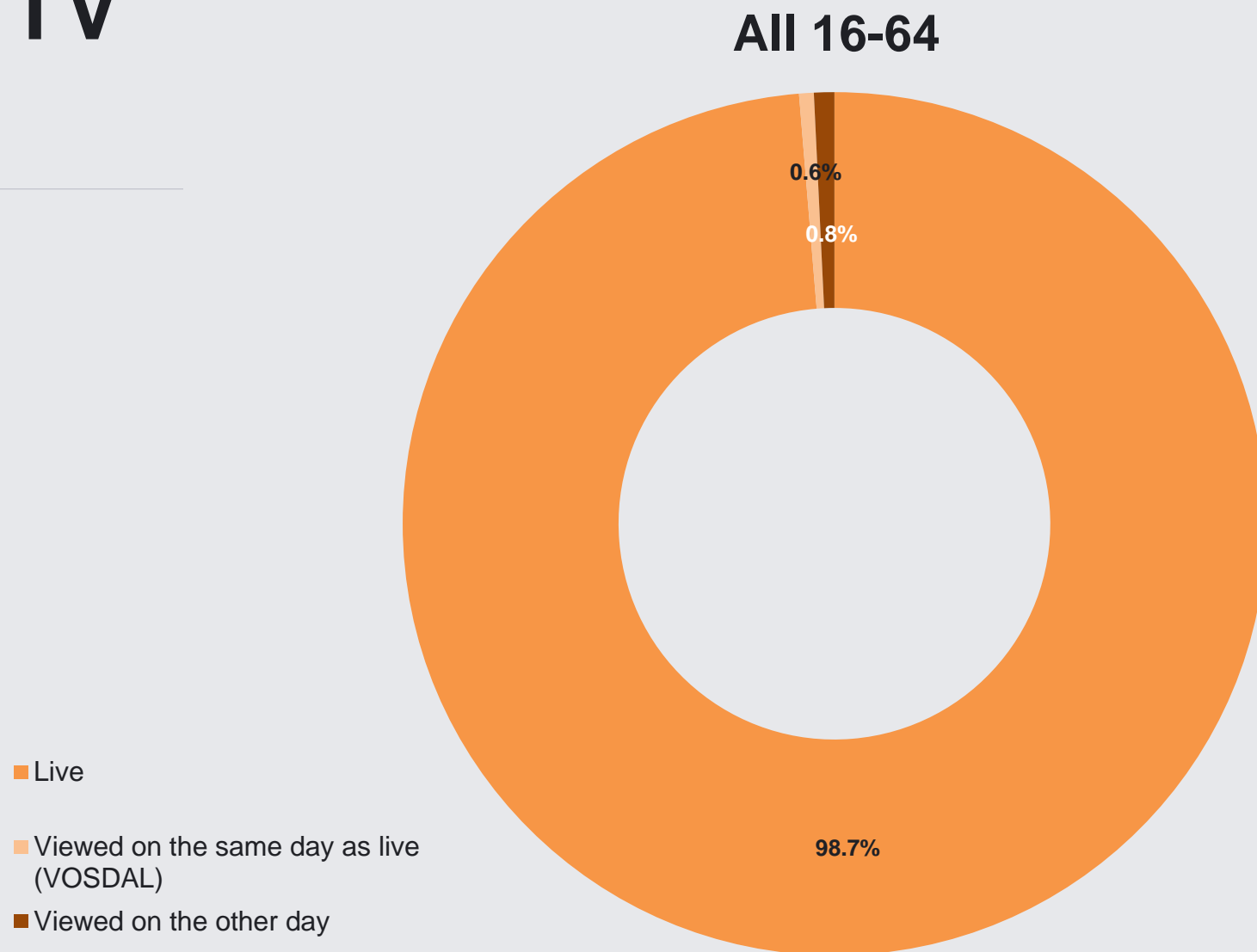


■ Live TV ■ Non-live

In the Netherlands, 74% of TV is watched live

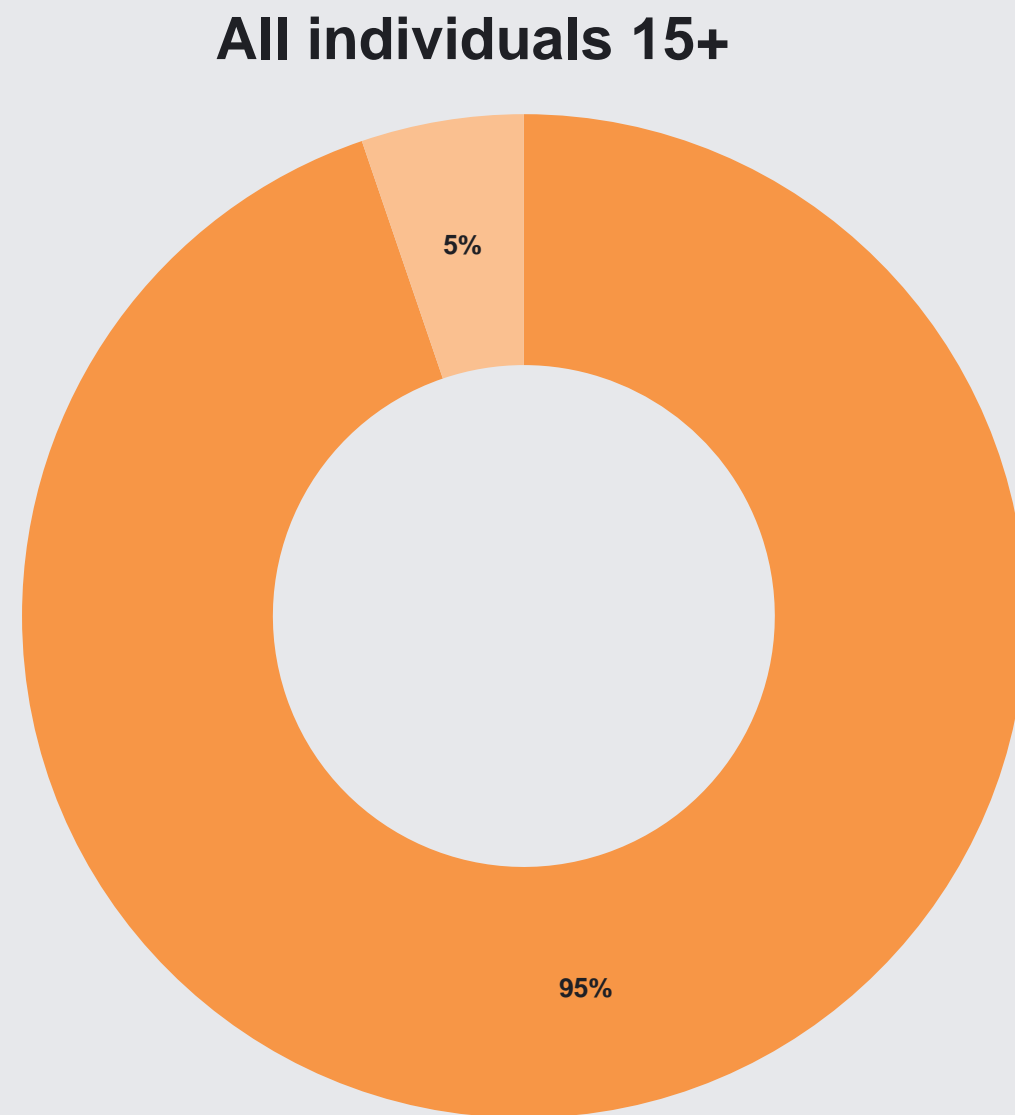


In Poland, 99% of TV is watched live

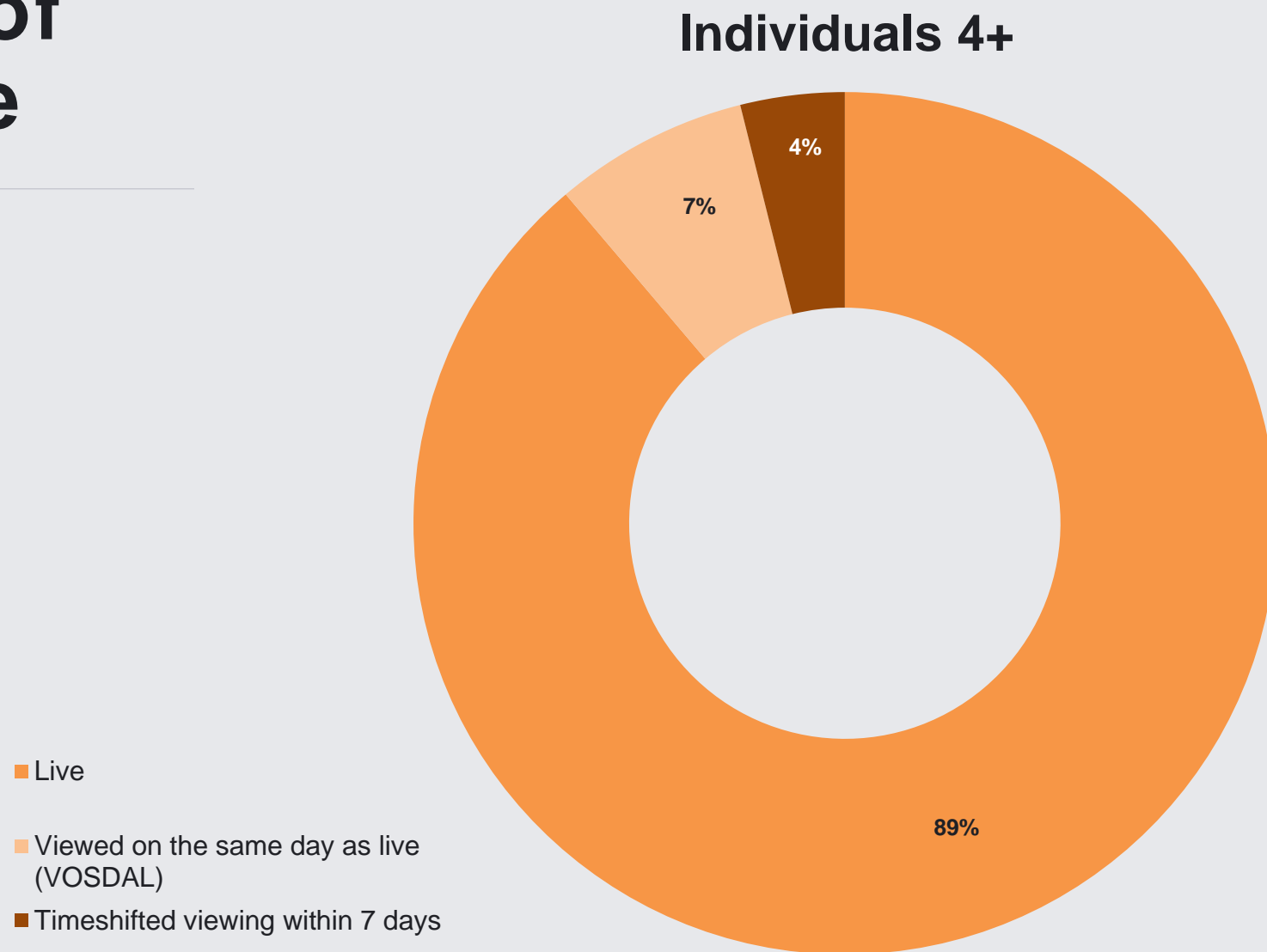


In Russia, 95% of TV is watched live

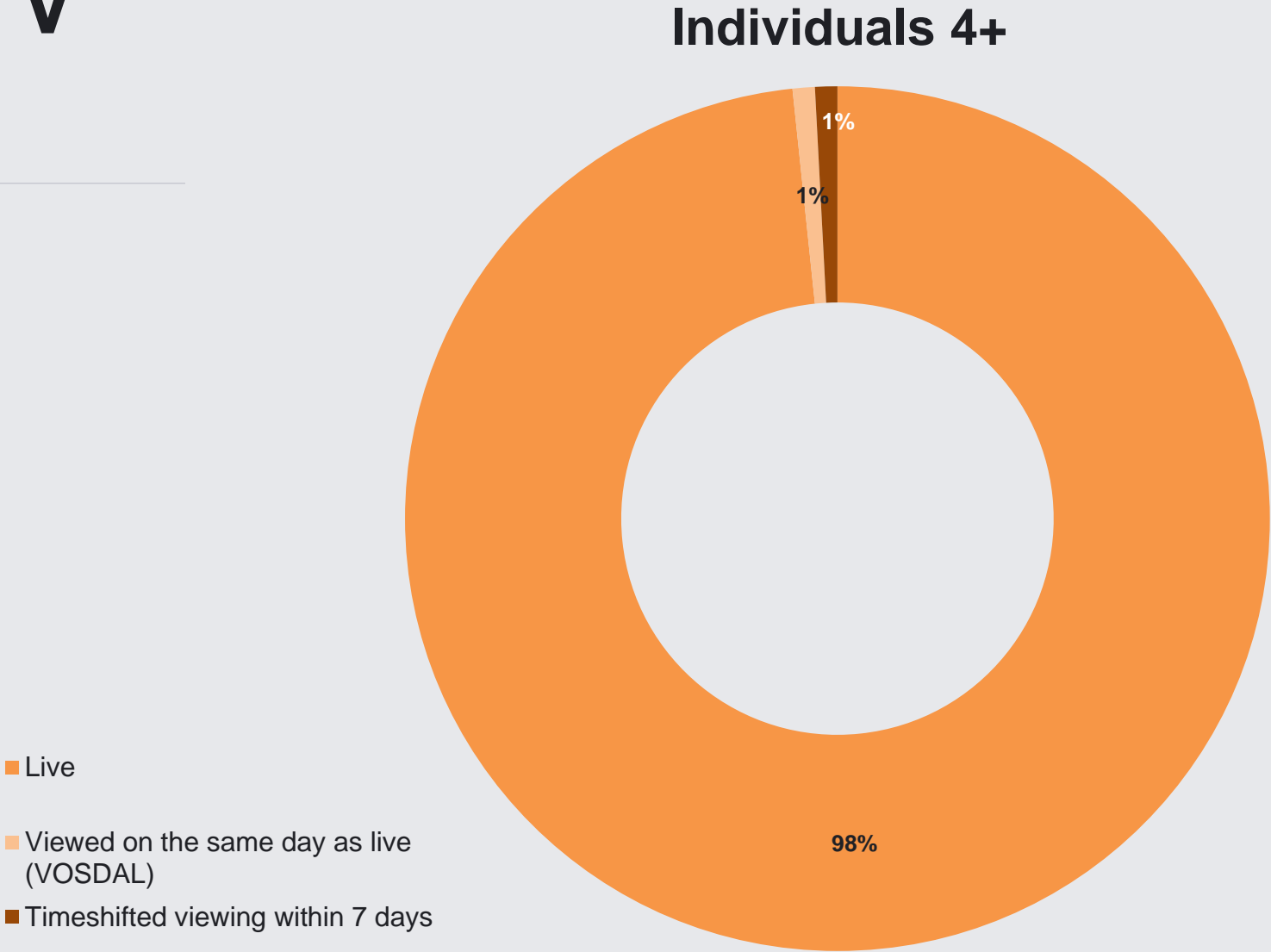
- Live
- catch up, VOD



In Slovenia, 89% of TV is watched live

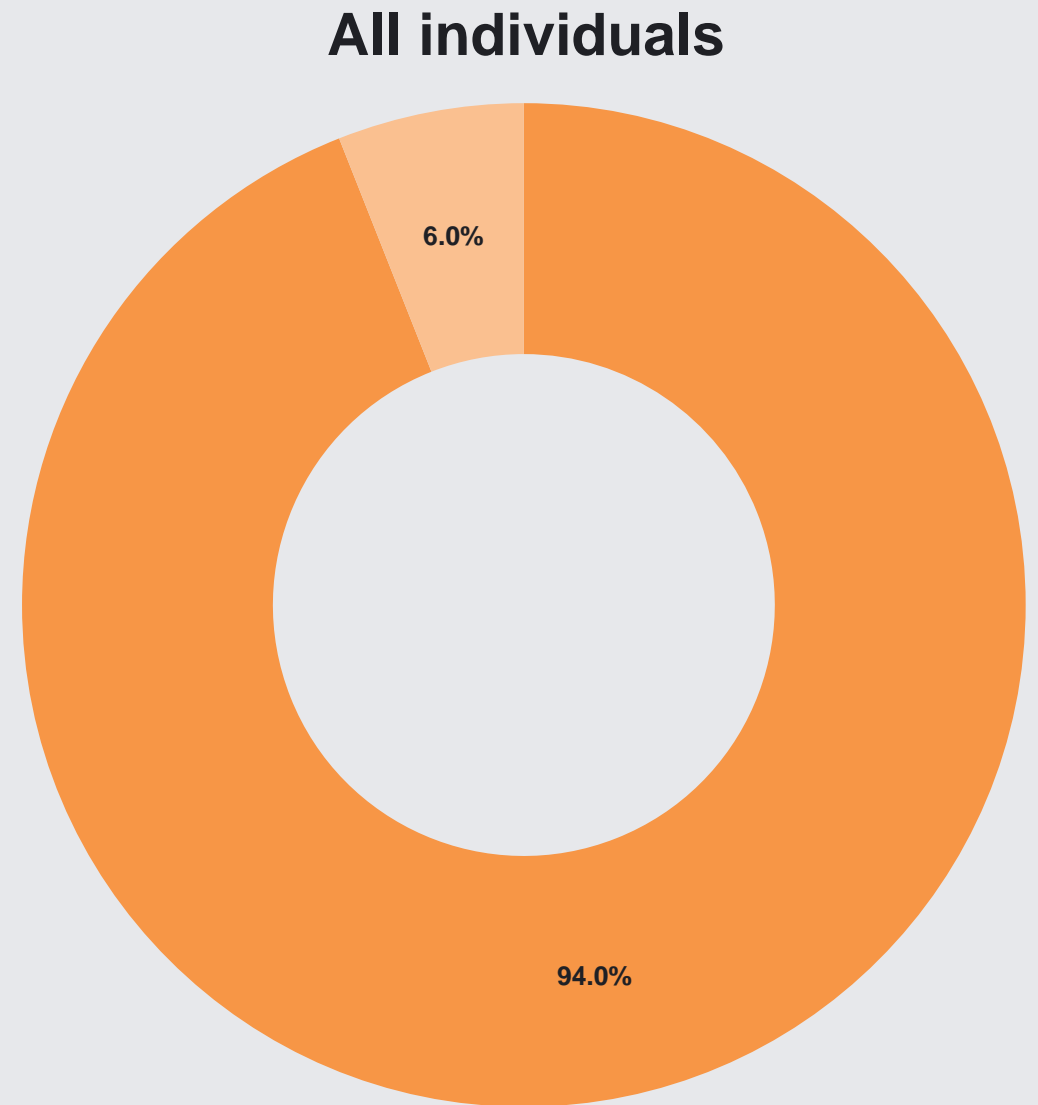


In Korea, 98% of TV is watched live

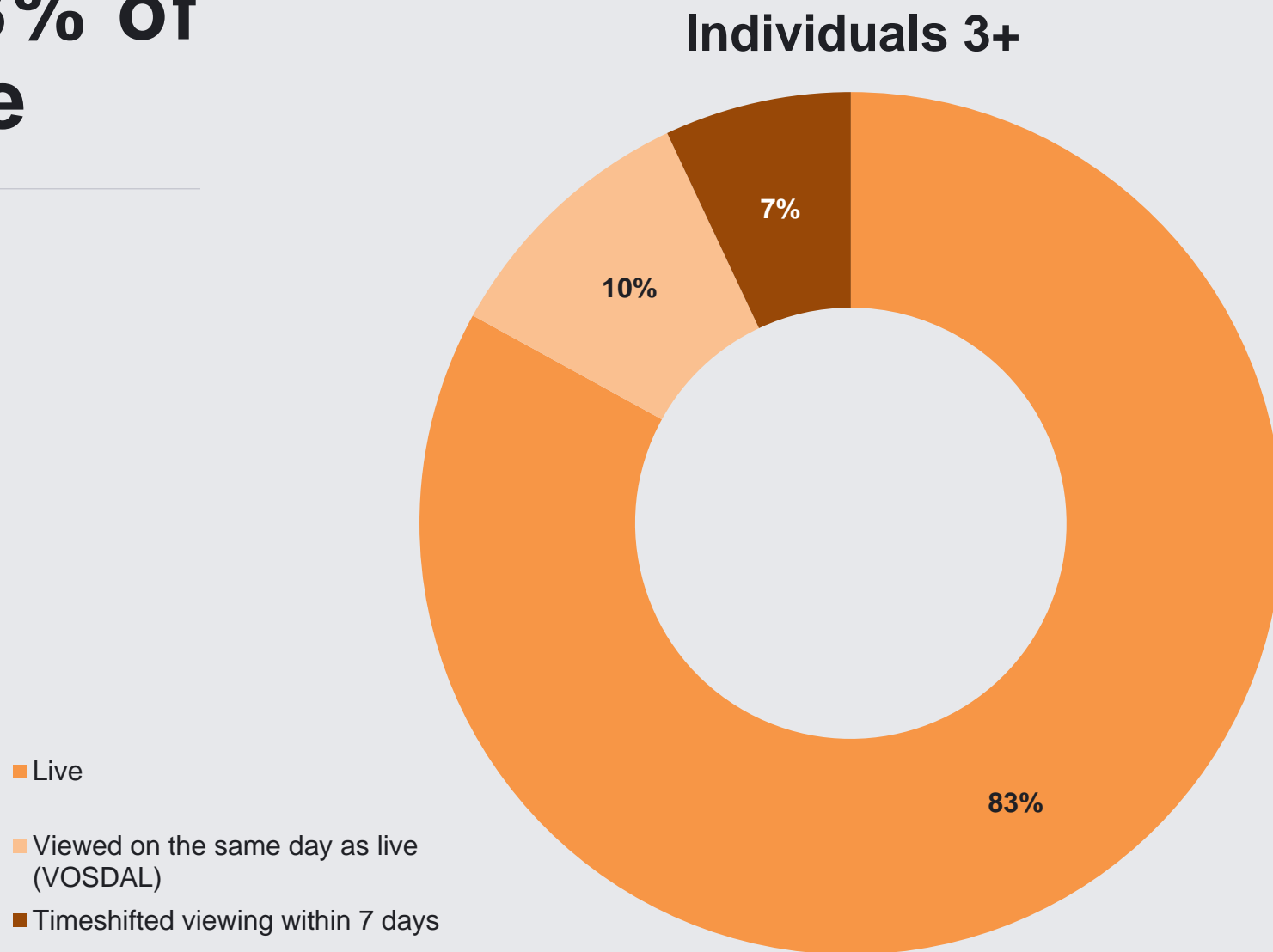


In Sweden, 94% of TV is watched live

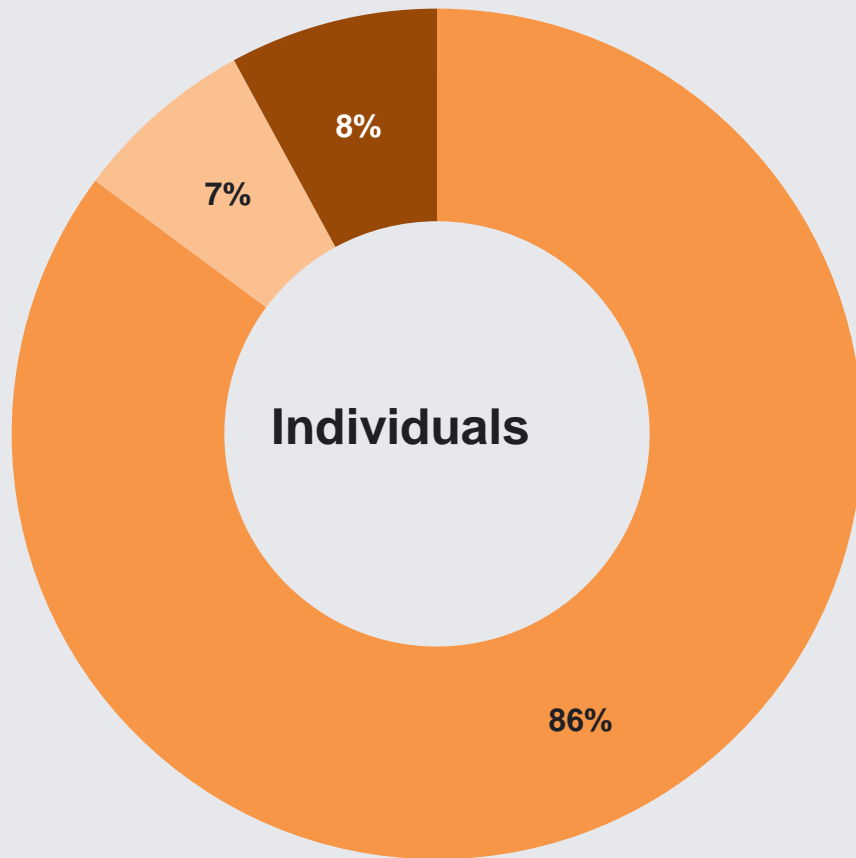
- Live
- Playback within 7 days



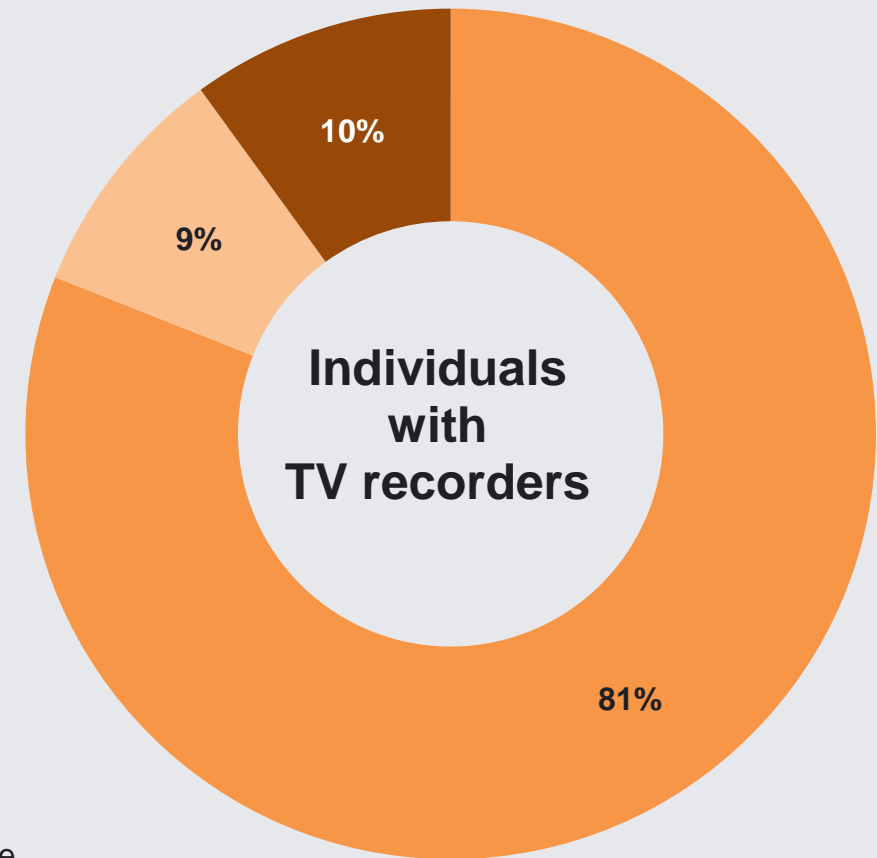
In Switzerland, 83% of TV is watched live



In the UK, 86% of TV is watched live

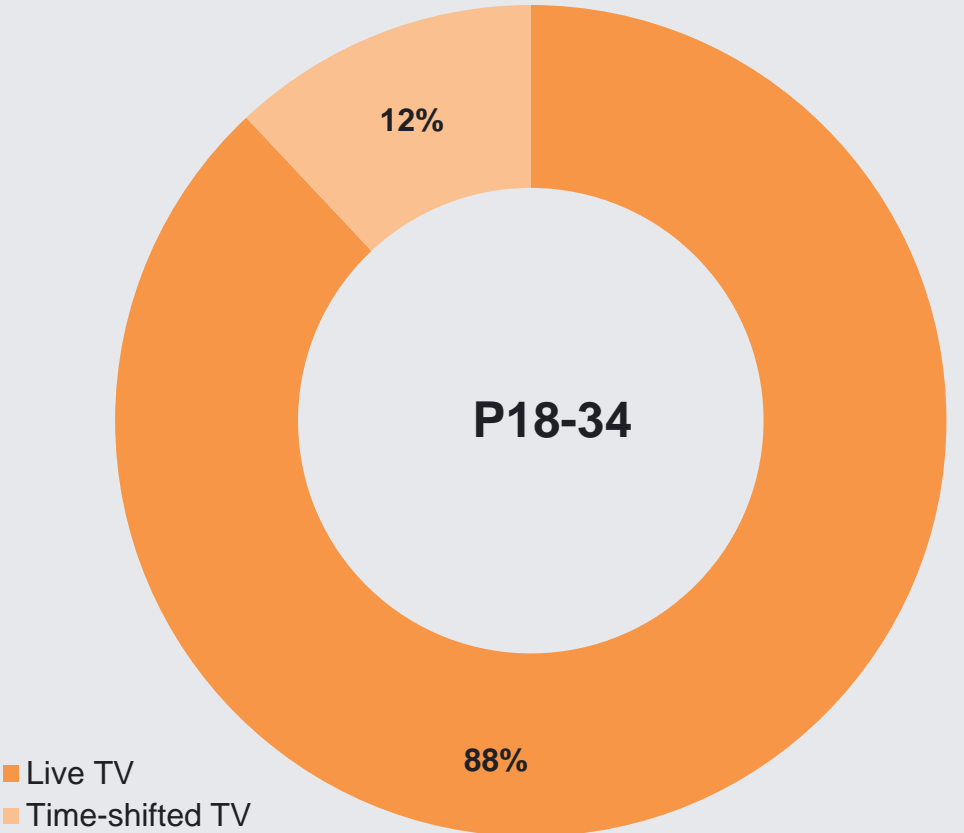
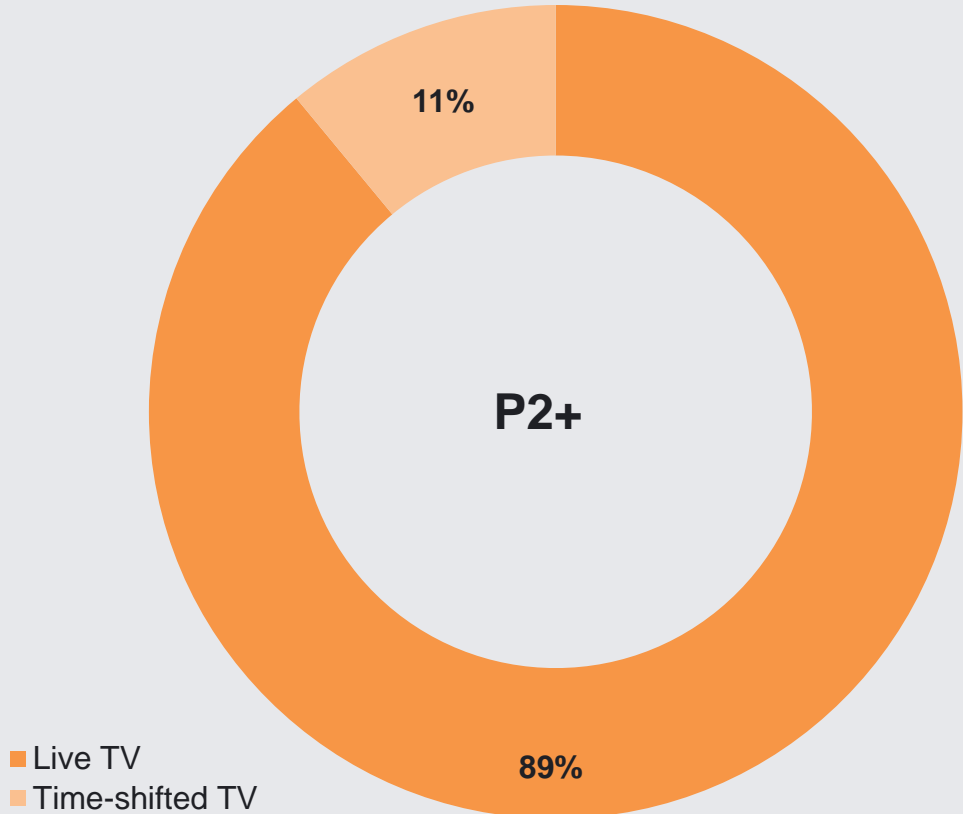


- Live
- Viewed on the same day as live (VOSDAL)
- Timeshifted viewing within 7 days



- Live
- Viewed on the same day as live (VOSDAL)
- Timeshifted viewing within 7 days

In the US, 89% of TV is watched live



Impact

TV is the most trusted and impactful form of advertising



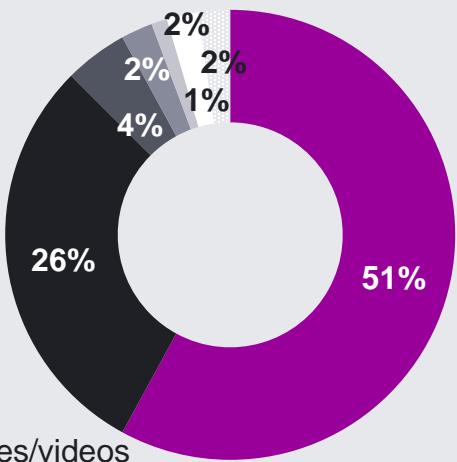
“A lot of our **campaign recall comes from TV** and not from Digital. When ads on Facebook just flow by, with TV ads we’re really able to tell our story.”

Per Carleo, Marketing Director Sweden of Volvo

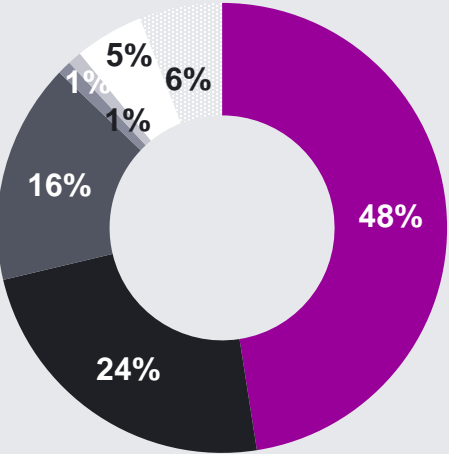
June 2017

TV is the preferred media across various characteristics

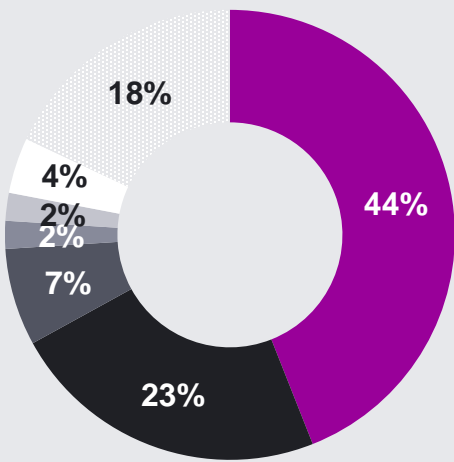
Entertains me the most



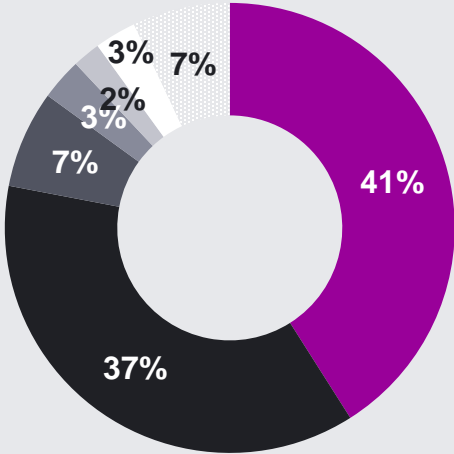
Most credible source of news



Most appealing advertising

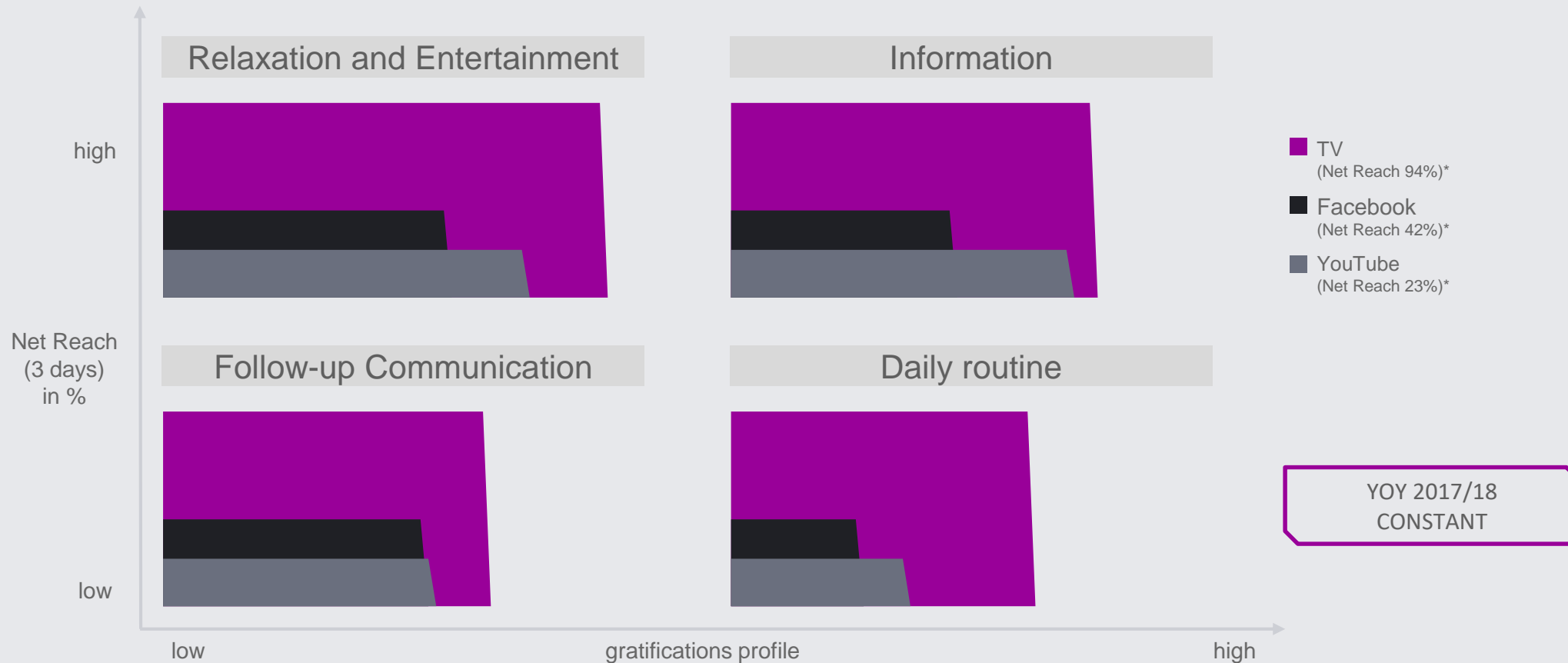


Most innovative



- TV
- Internet
- Radio
- Online movies/videos
- Cinema
- Newspaper/Magazine
- None

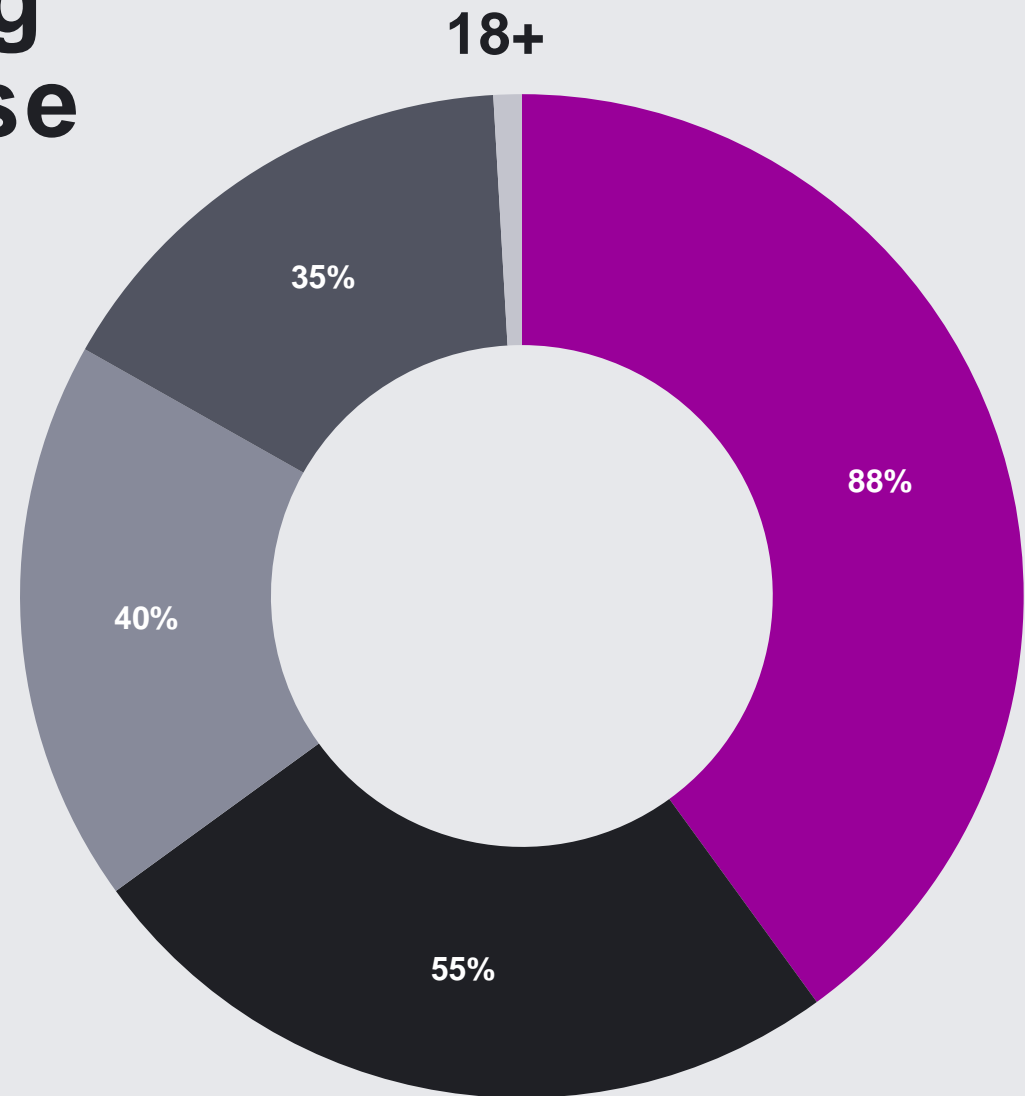
TV is the preferred media across various gratification criteria



Consumers prefer watching content on TV above all else

% of preferred device to watch TV content

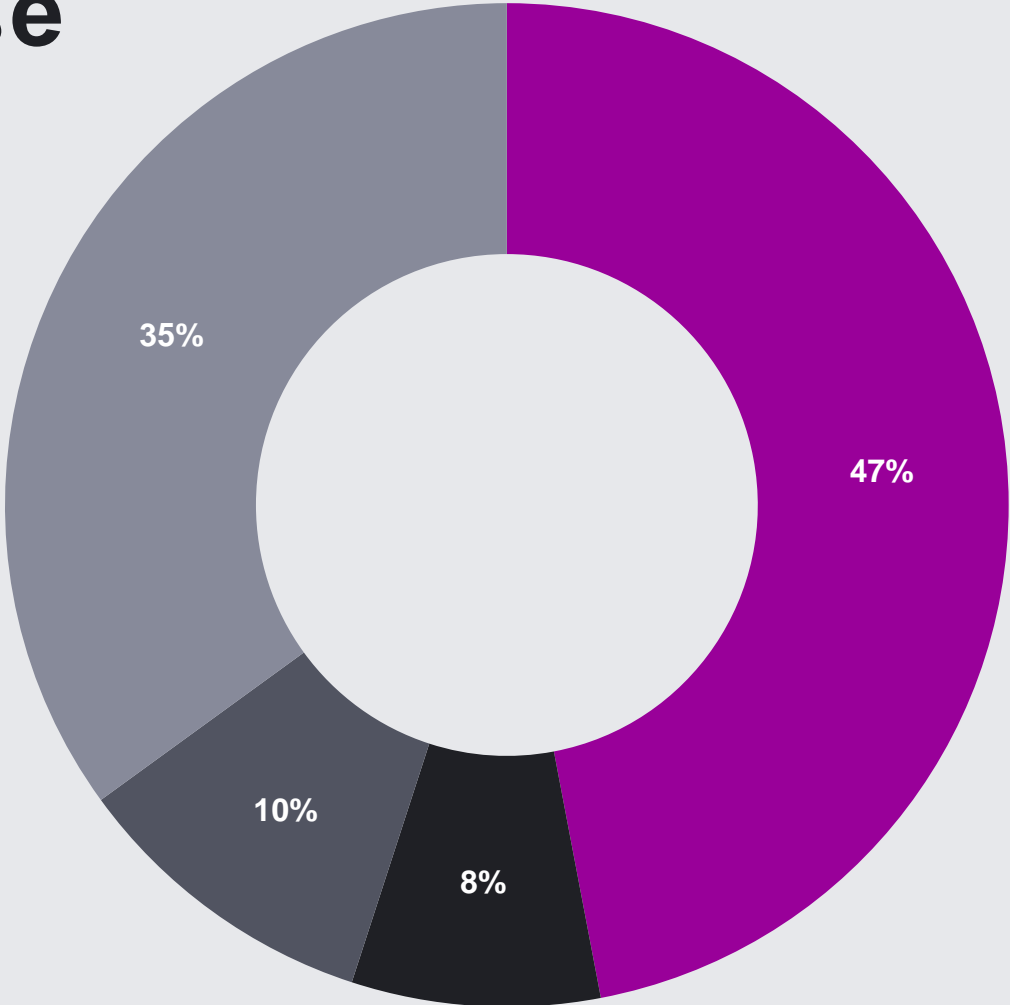
- TV
- Laptop
- Smartphone
- Tablet
- Smartwatch



Consumers prefer watching content on TV above all else

Q: Which media do you prefer the most?

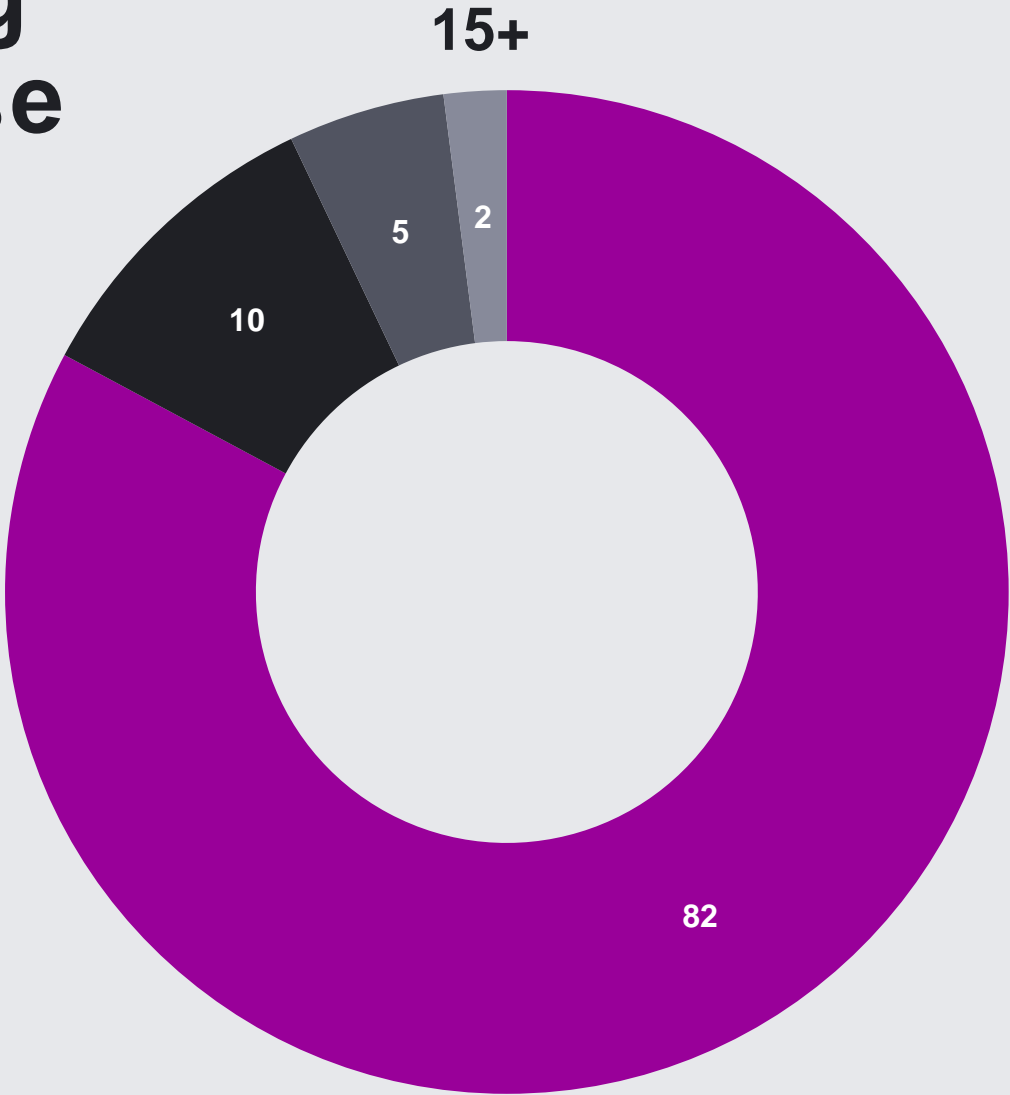
- TV
- Mobile
- PC
- No difference



Consumers prefer watching content on TV above all else

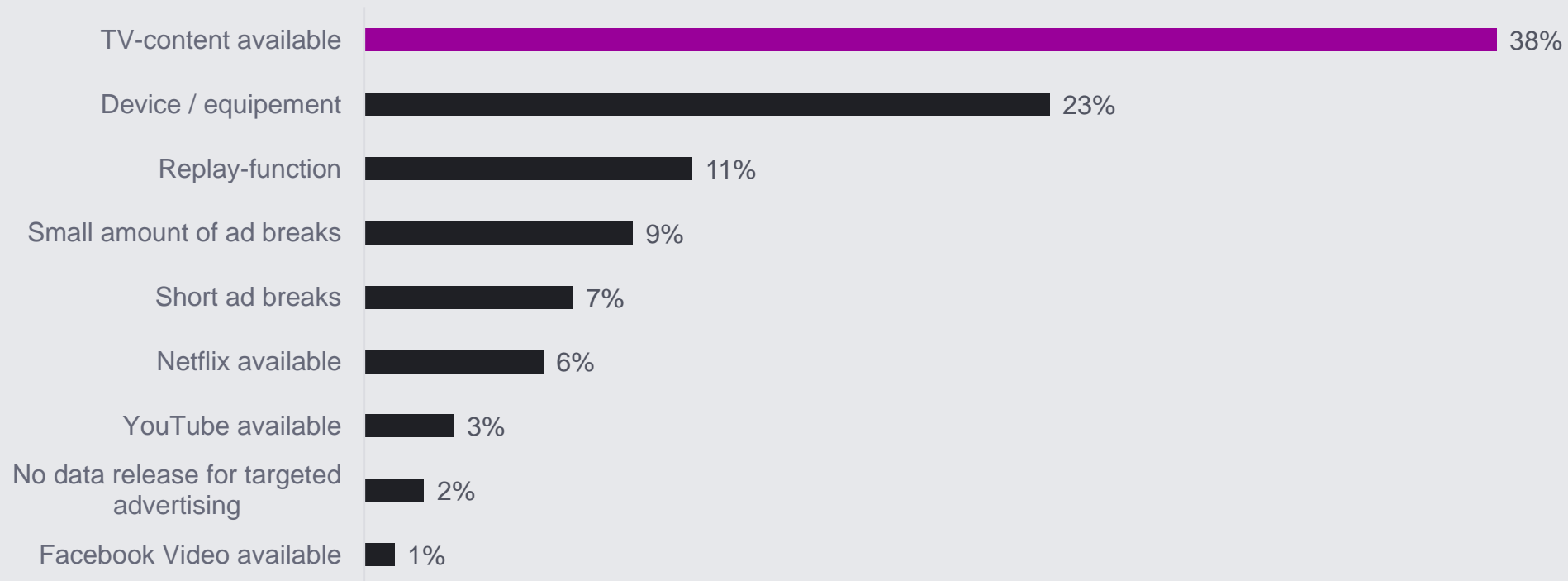
Index of preferred device for using TV content or video

- TV
- Laptop
- Tablet
- Mobile



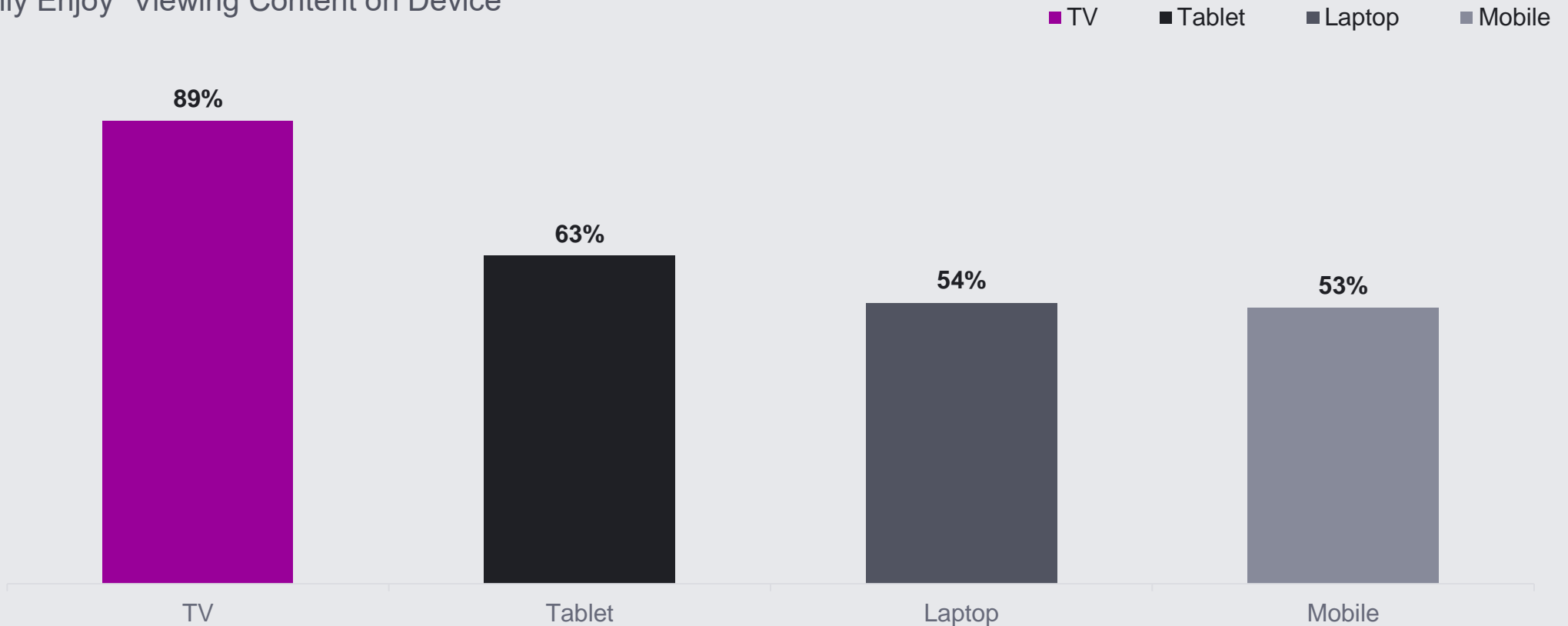
Consumers prefer TV content above all else

What influences the use of video? Respondents had to choose between different packages varying content, device, presence of advertising, duration of the ad break etc. When TV content was available in package, the package was chosen more often.

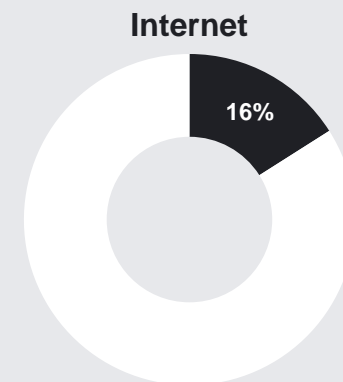
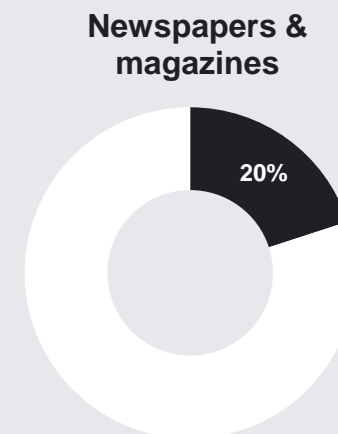
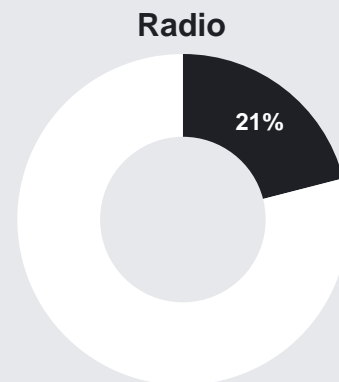
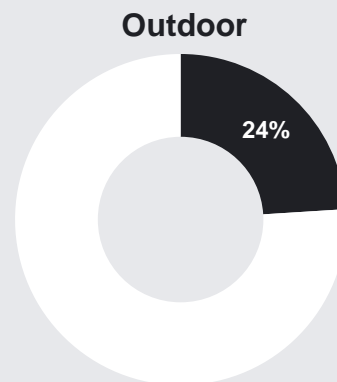
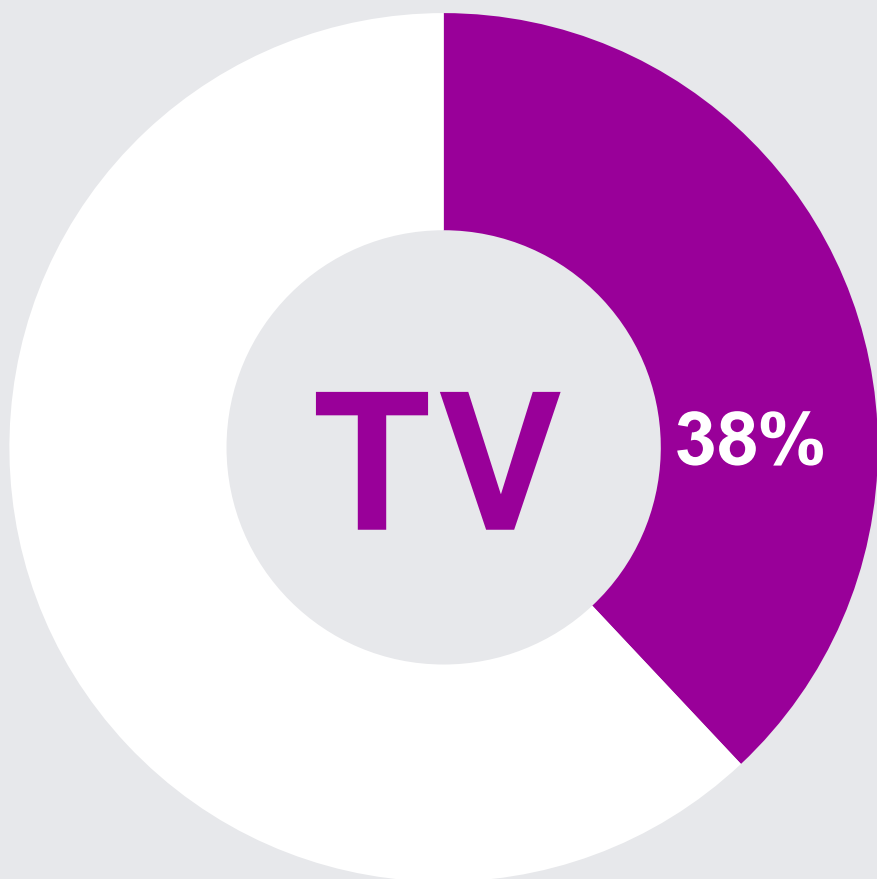


Consumers prefer watching content on TV above all else

% Who “Highly Enjoy” Viewing Content on Device

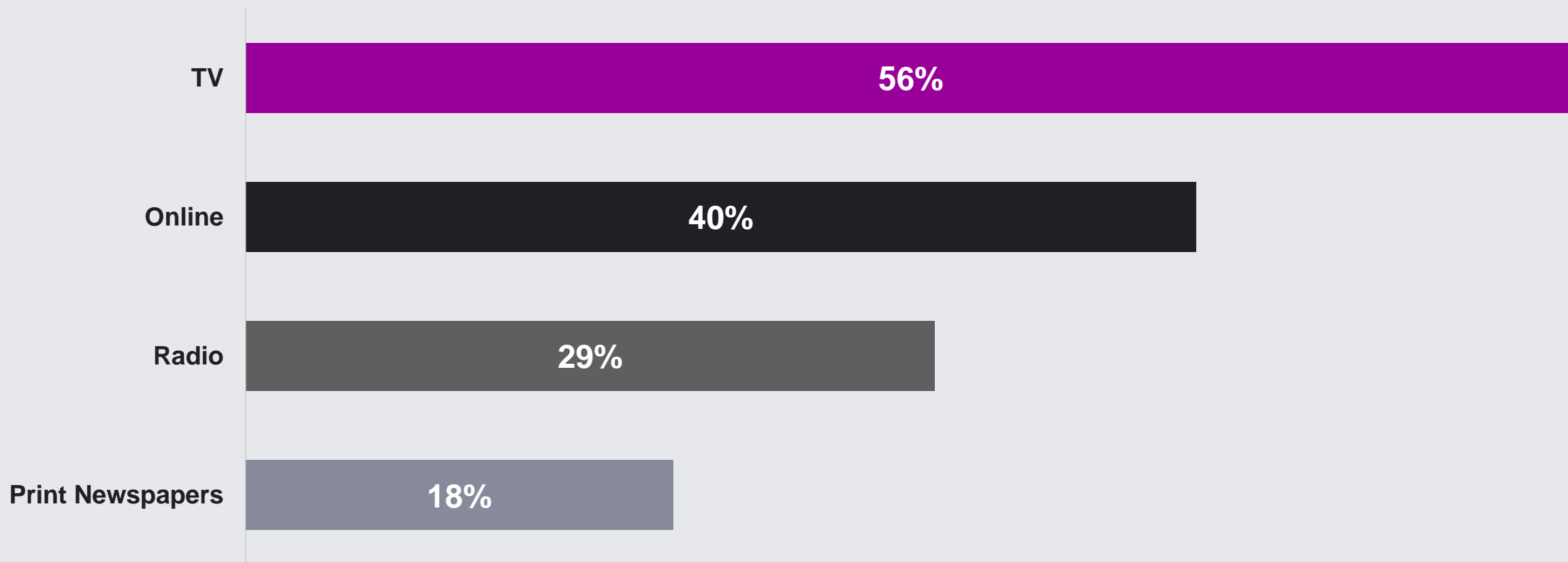


TV is by far the most useful form of advertising



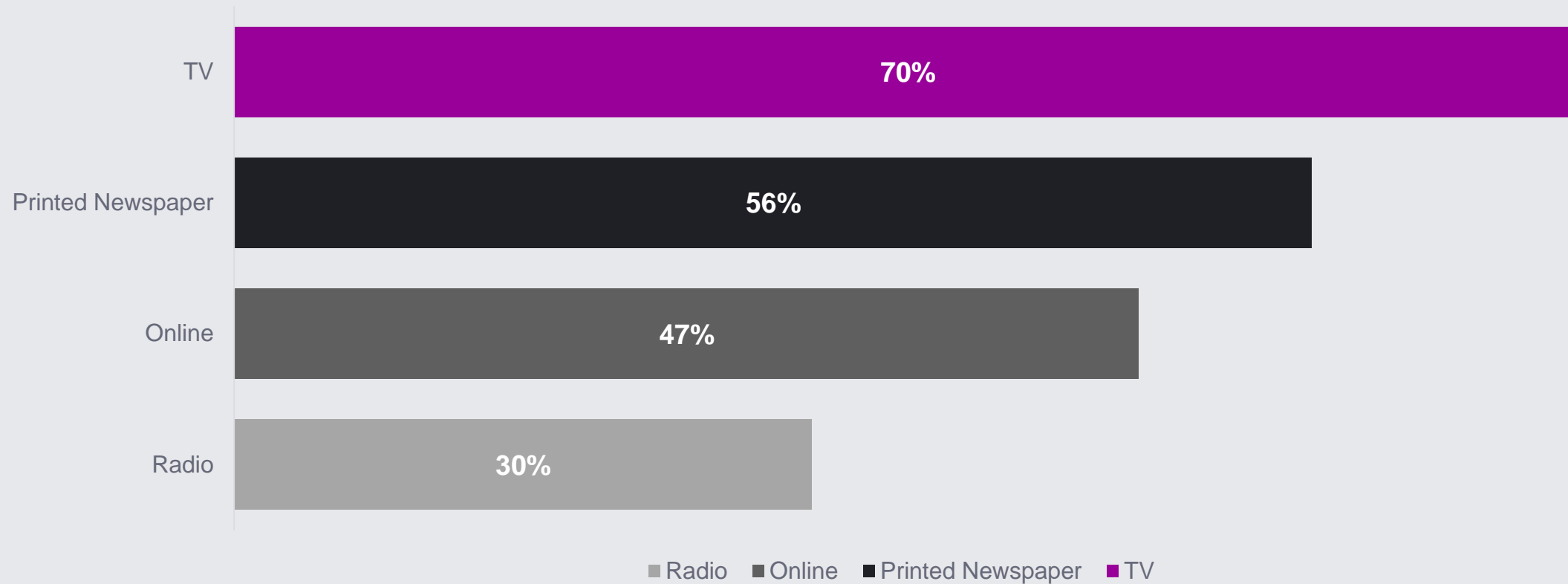
TV is our main source for news

% of adults who search for news on each platform daily or several times a week



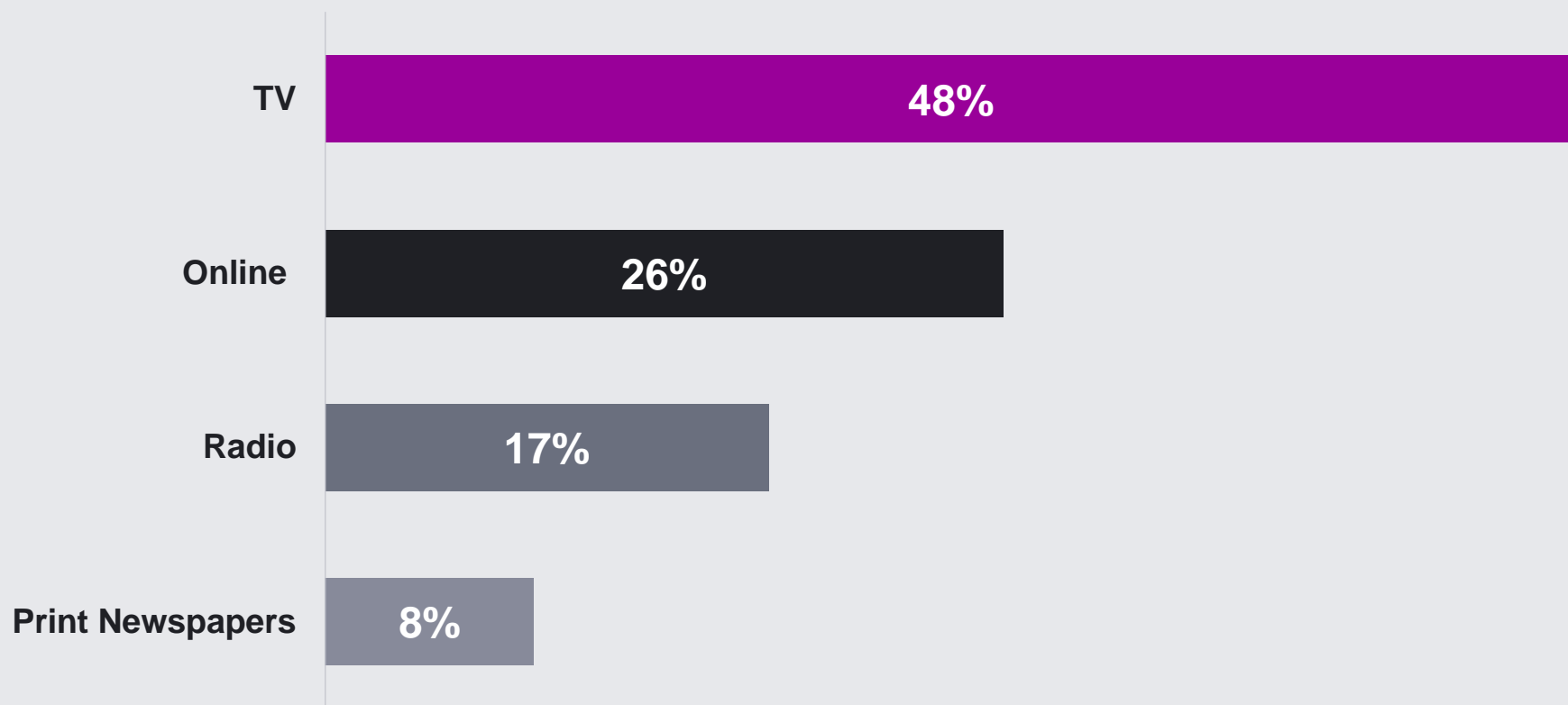
TV is our main source of news

% of adults (18+) who often consume news on each platform



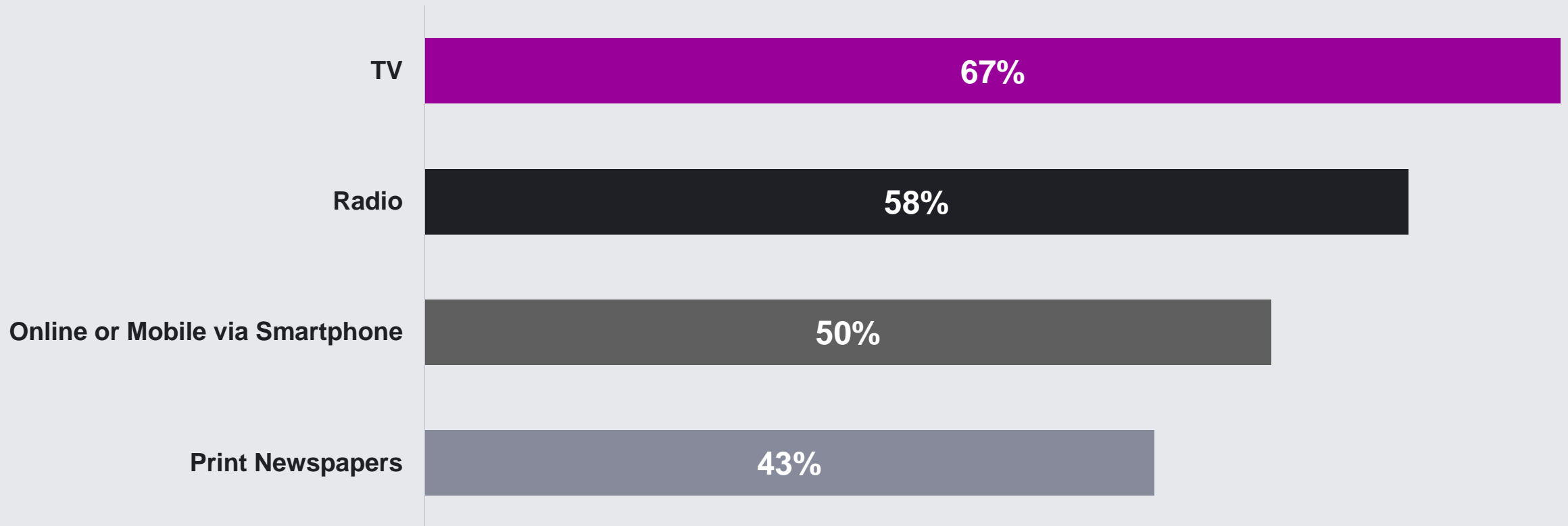
TV is the main source for news

% of adults who (very) often get news on each platform



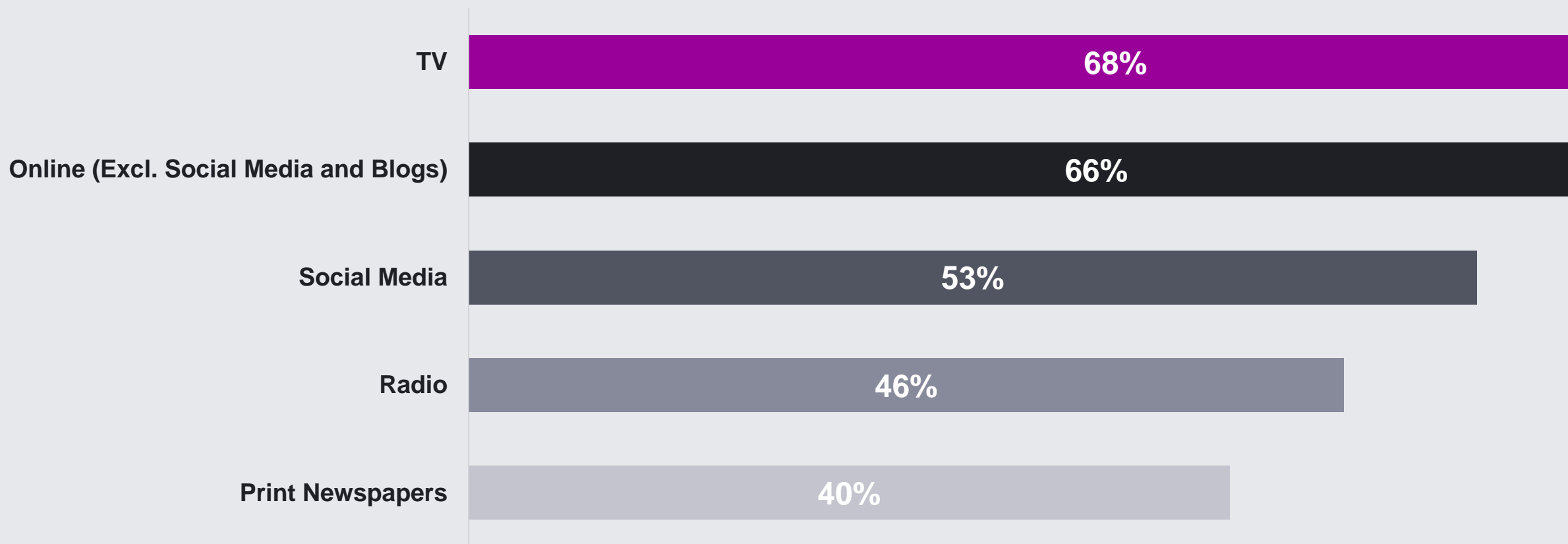
TV is the main source for news

% of adults who (very) often get news on each platform



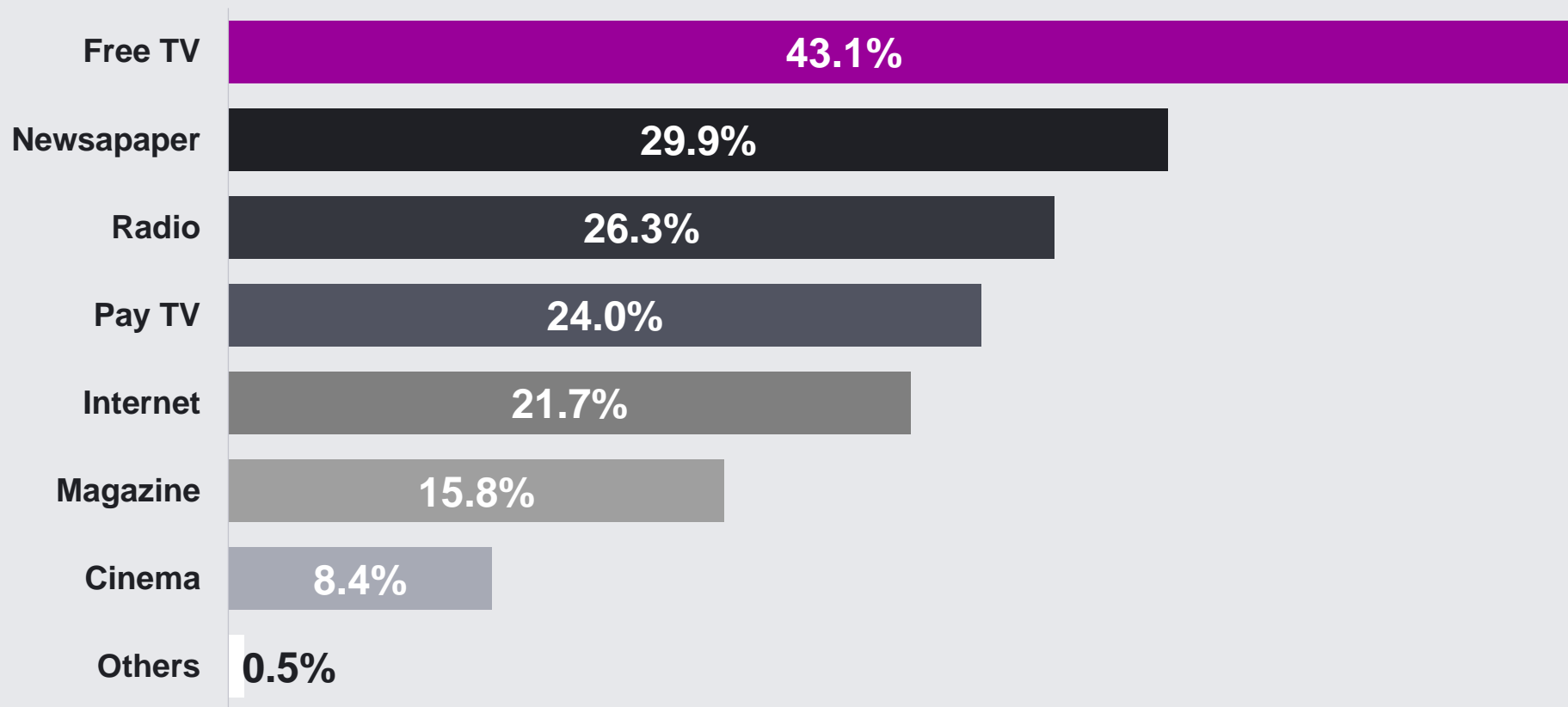
TV is our main source for news

% of adults who used each platform last week as a source of news



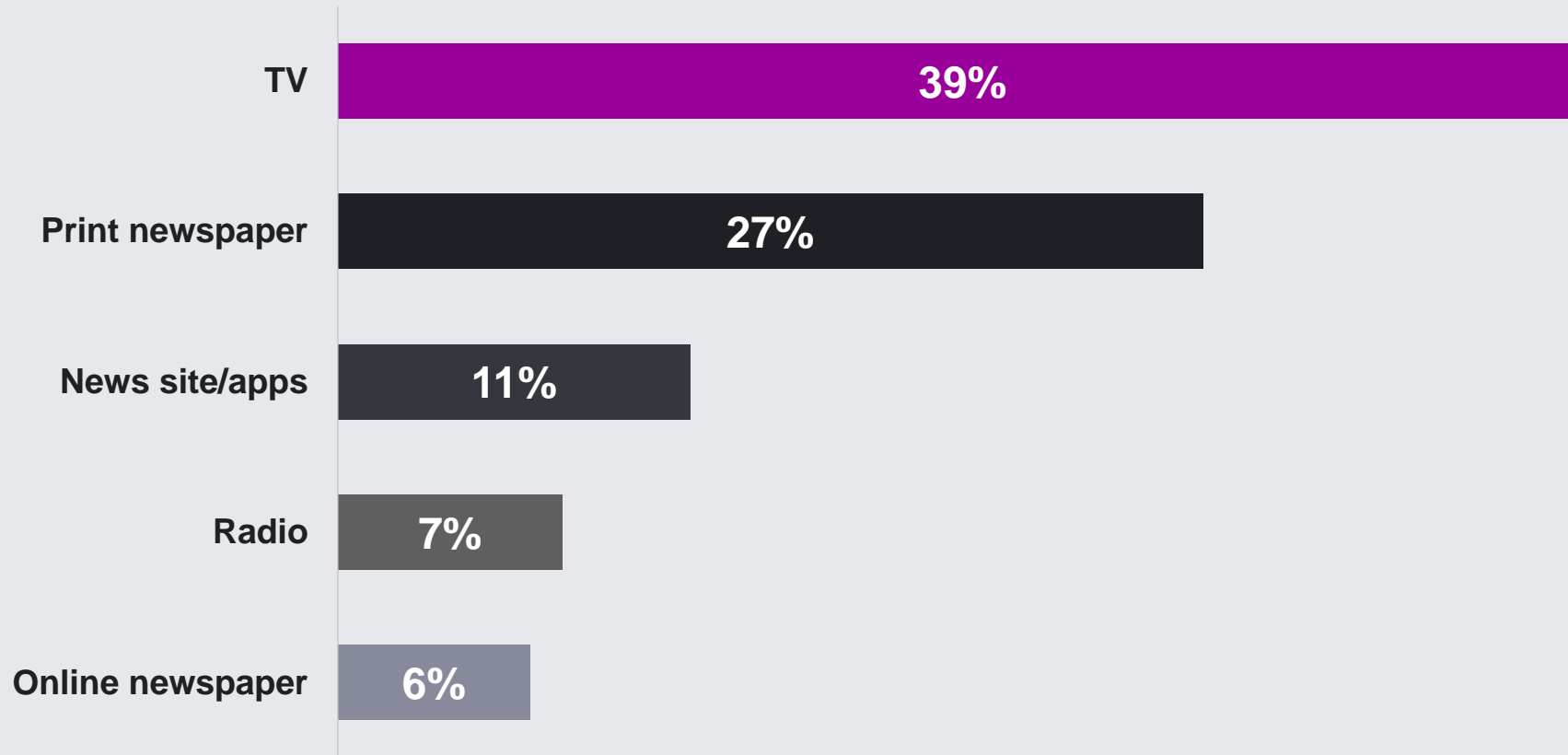
TV is our main source for news

% of adults who consider the following medium as credible



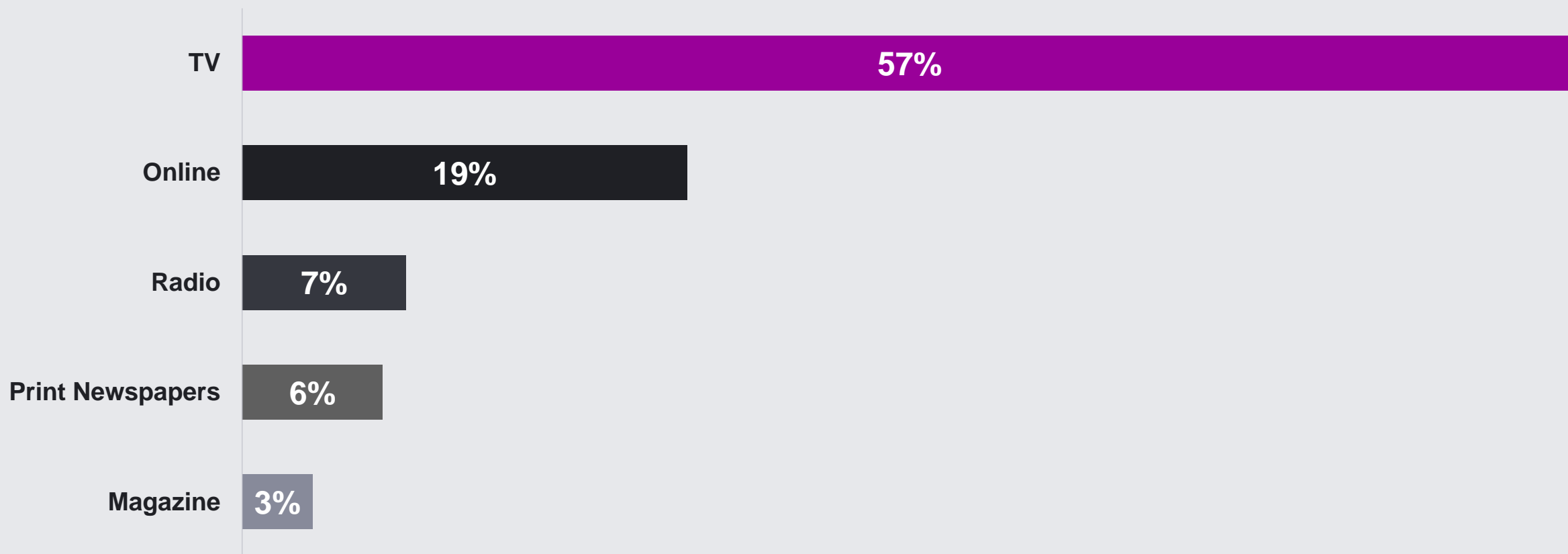
TV is the most trusted source for news

% of adults who often get news on each platform daily



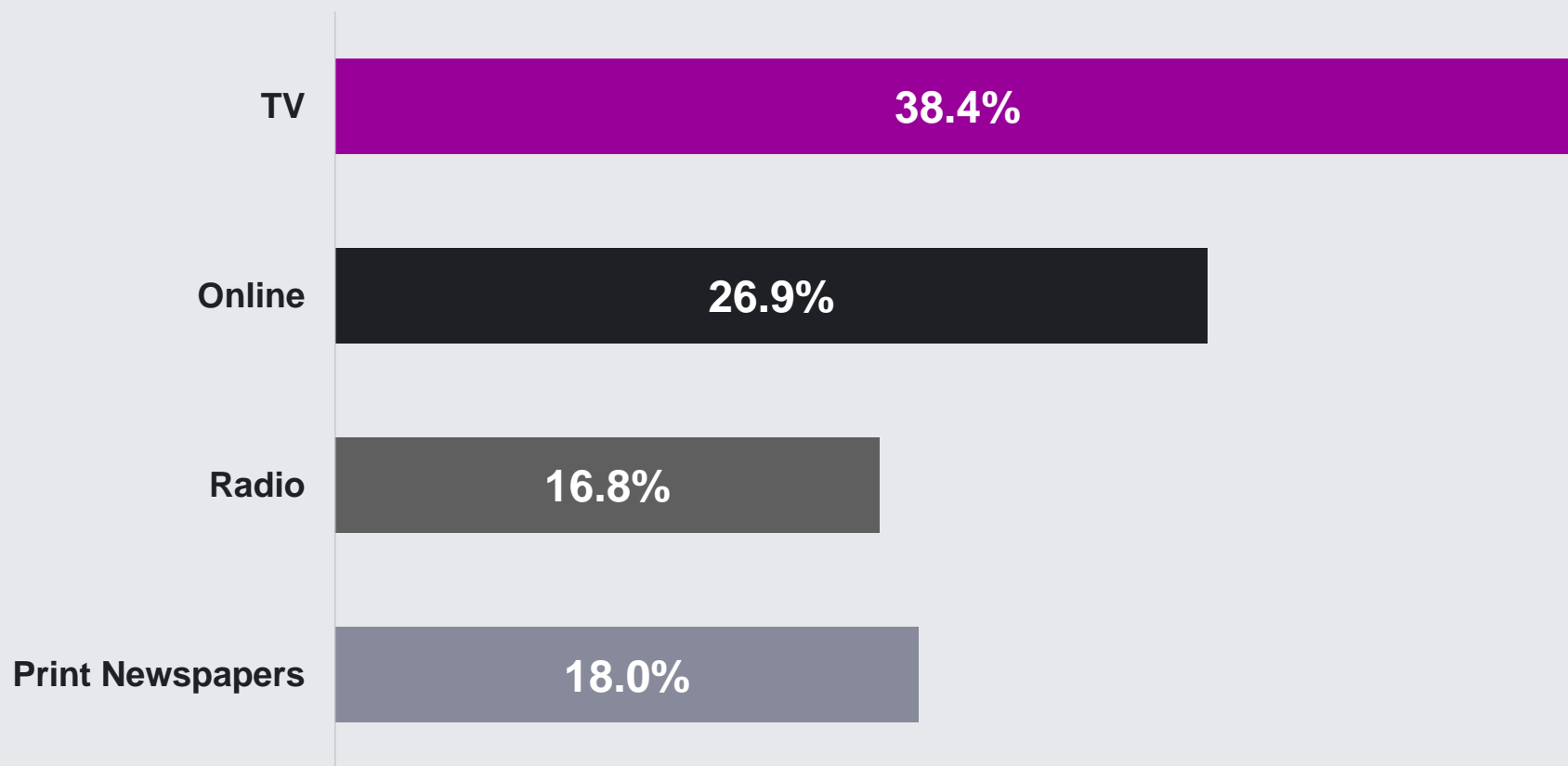
TV is our main source for news

% of adults who often get news on each platform



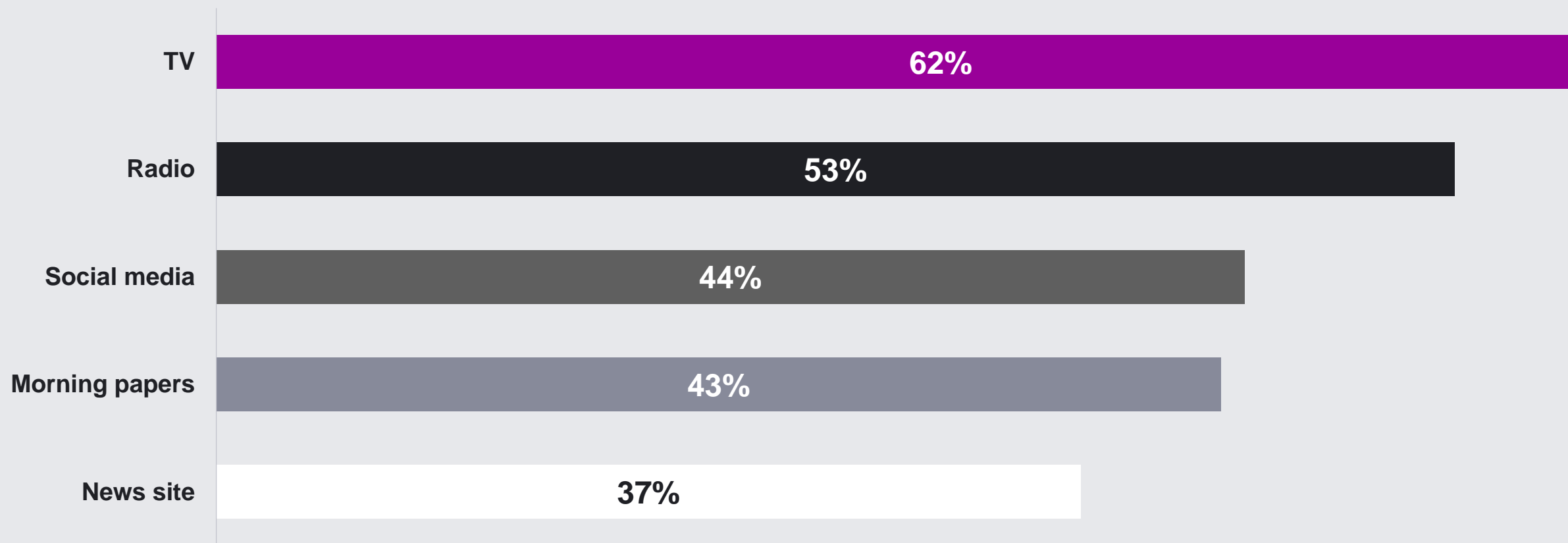
TV is our main source for news

% of adults answering about their preferred media to enquire about a relevant topic



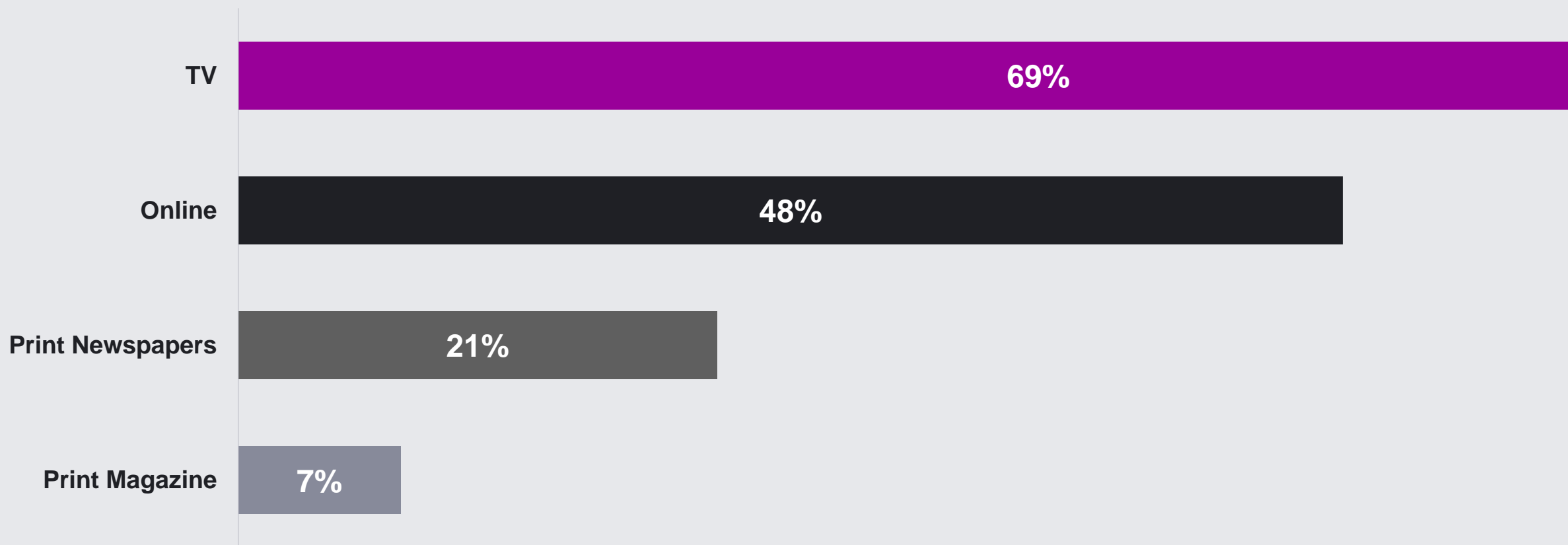
TV is our main source for news

% of adults who get news on each platform on a daily basis



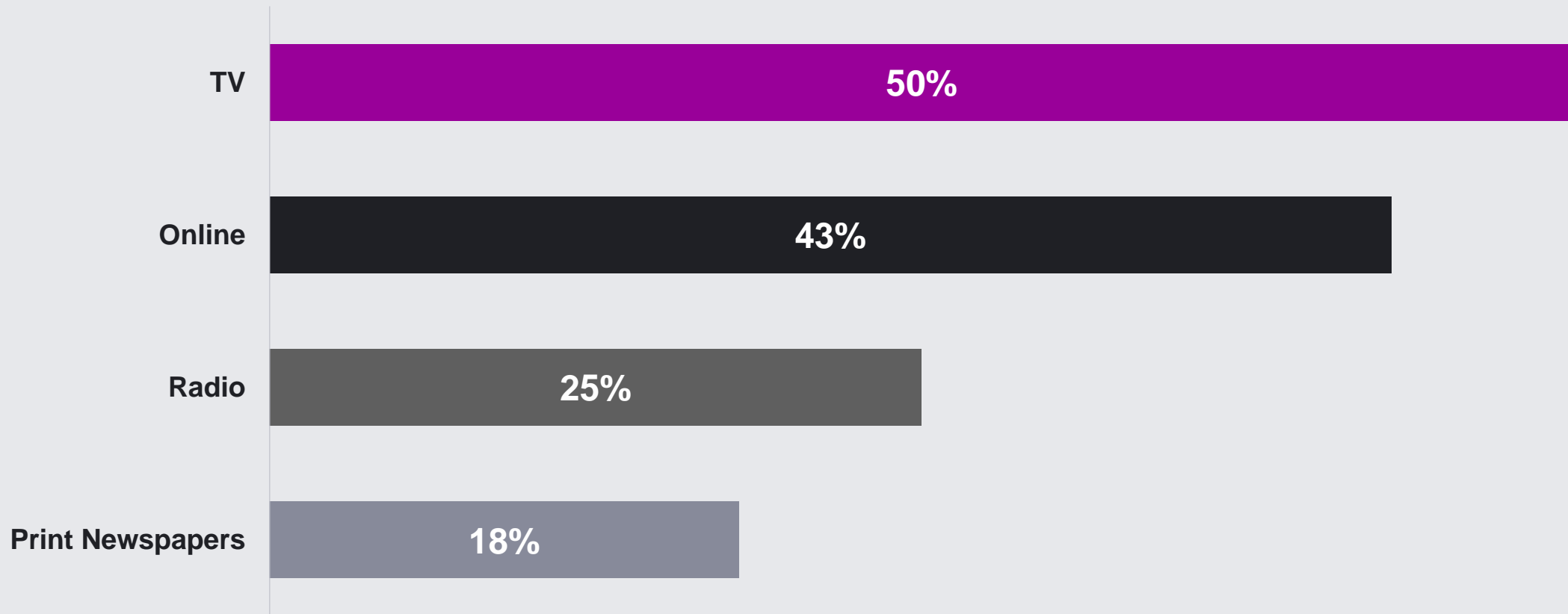
TV is our main source for news

% of adults who often get news on each platform



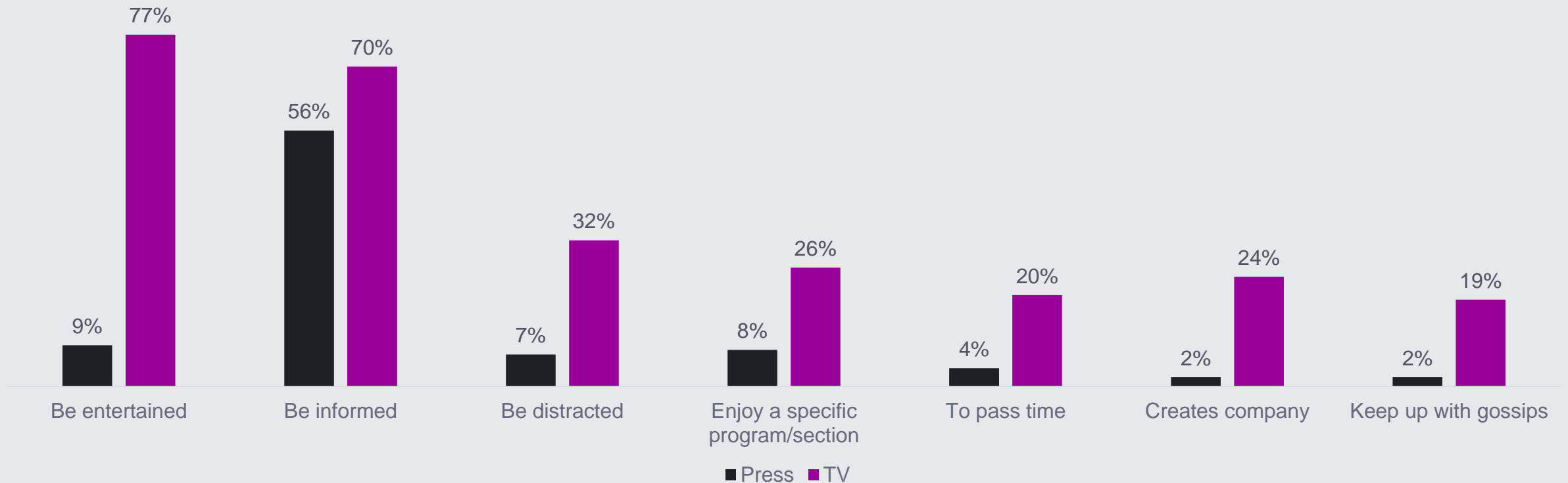
TV is our main source for news

% of adults who often get news on each platform



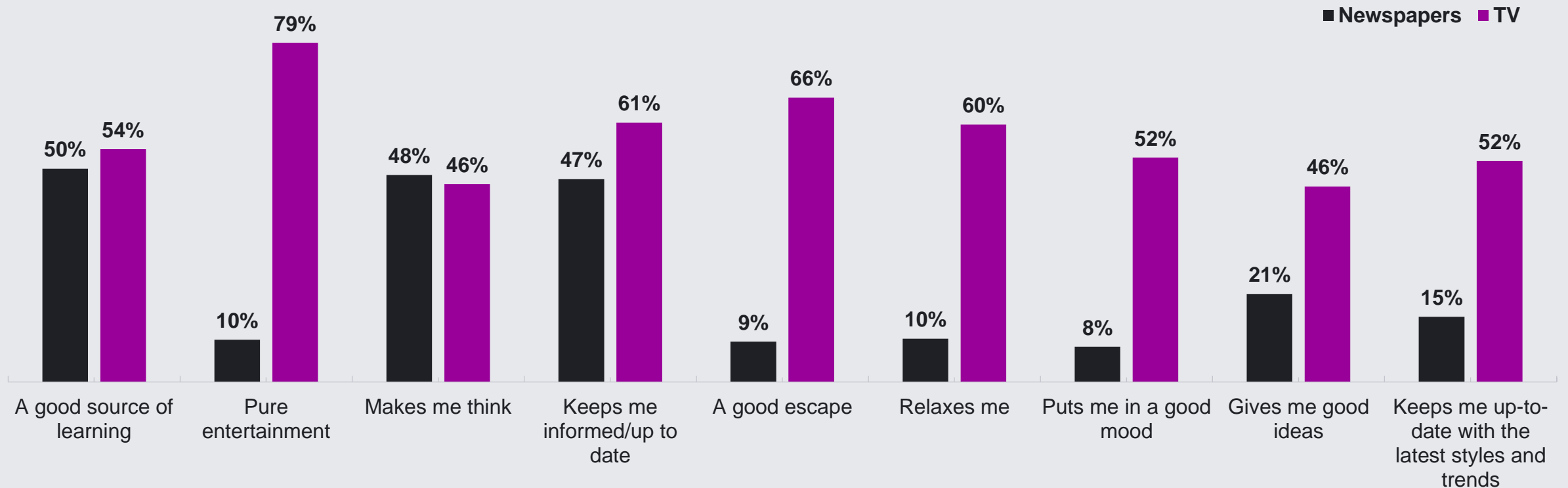
Television is more informative than newspapers

The preferred media to...

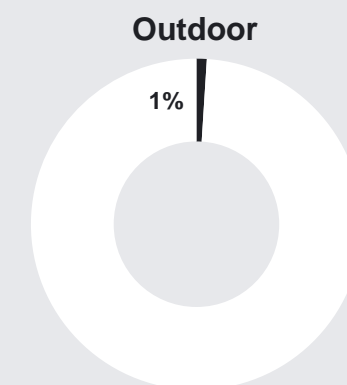
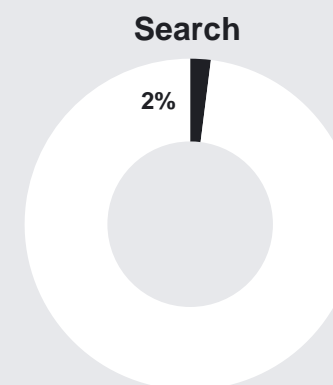
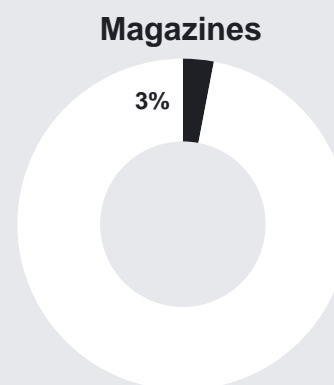
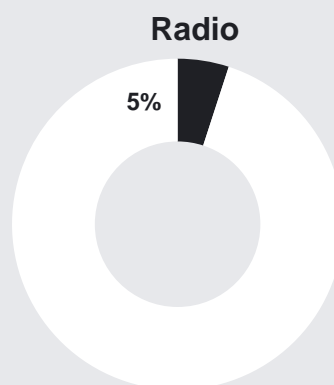
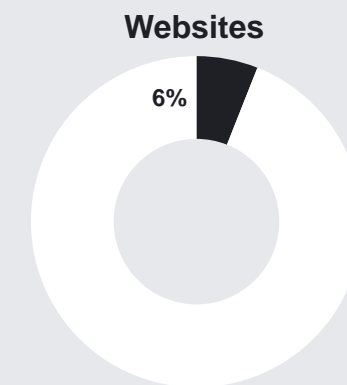
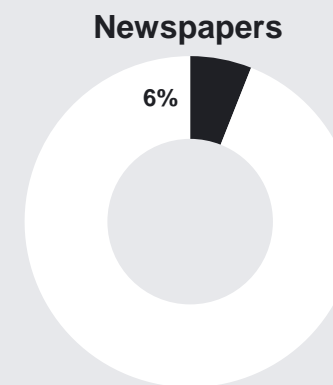
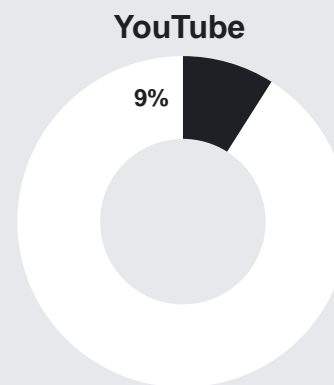
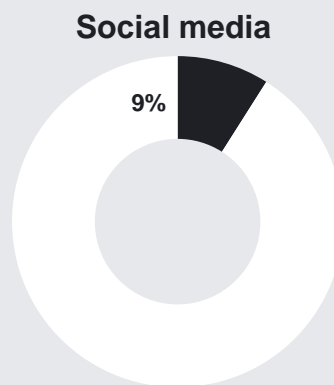
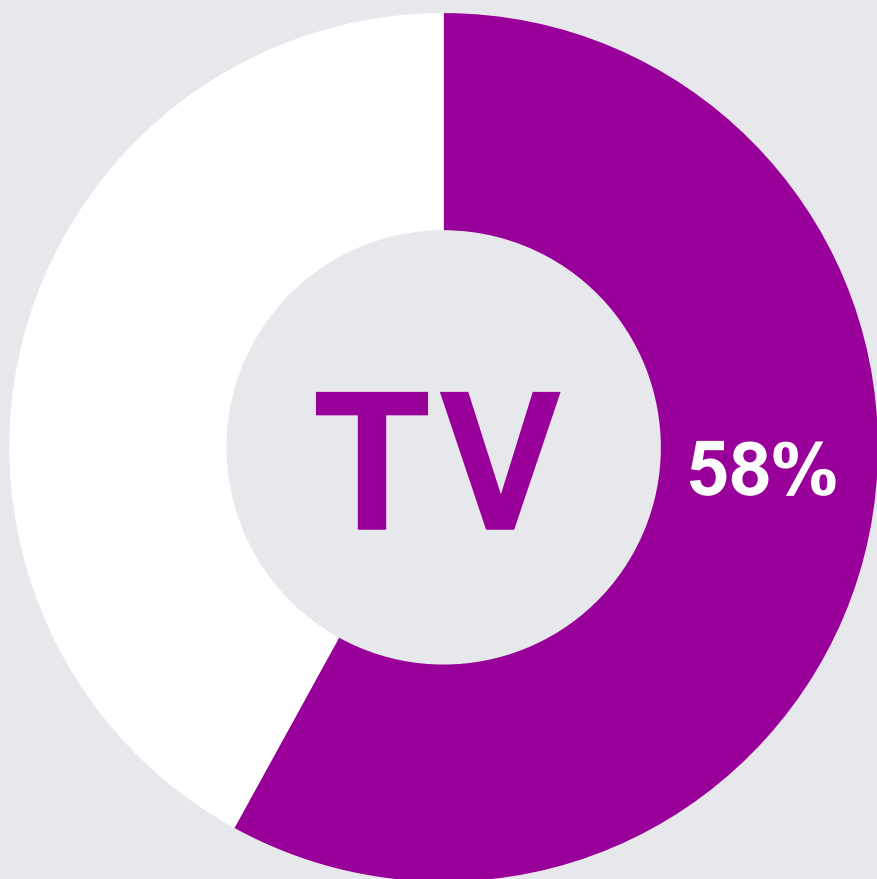


TV is more informative than newspapers

Attitudes Towards Media (Adults 18+)

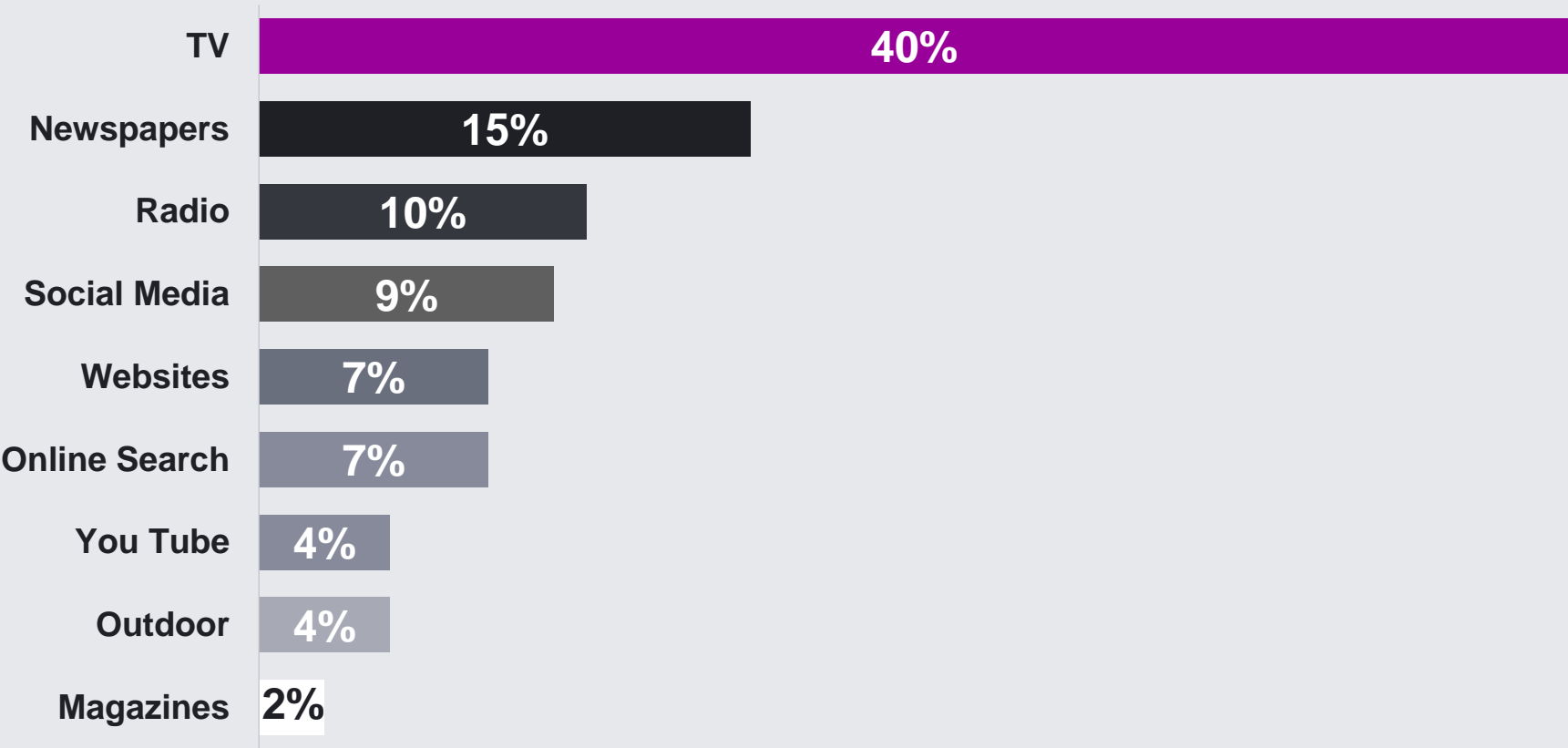


TV ads evoke emotions more than ads in other media

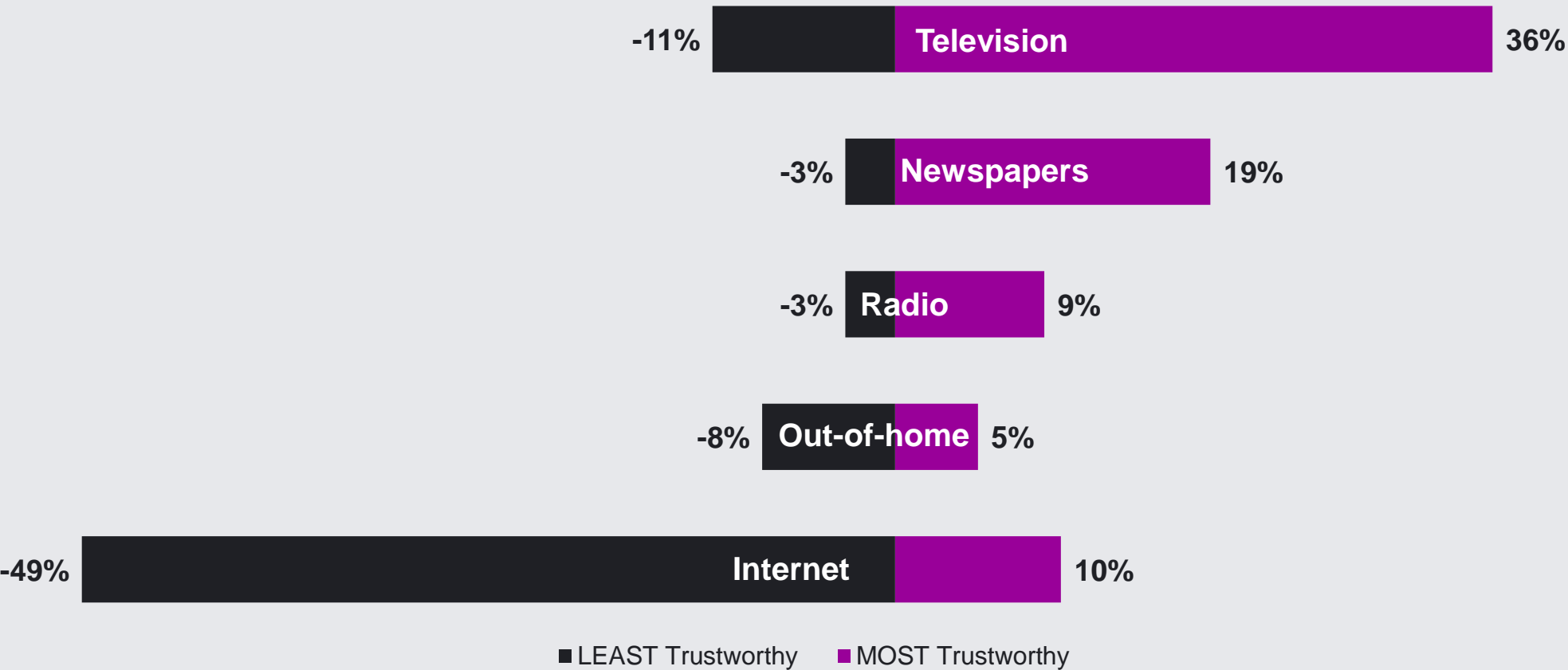


Australians trust TV advertising the most

% of adults who often get news on each platform

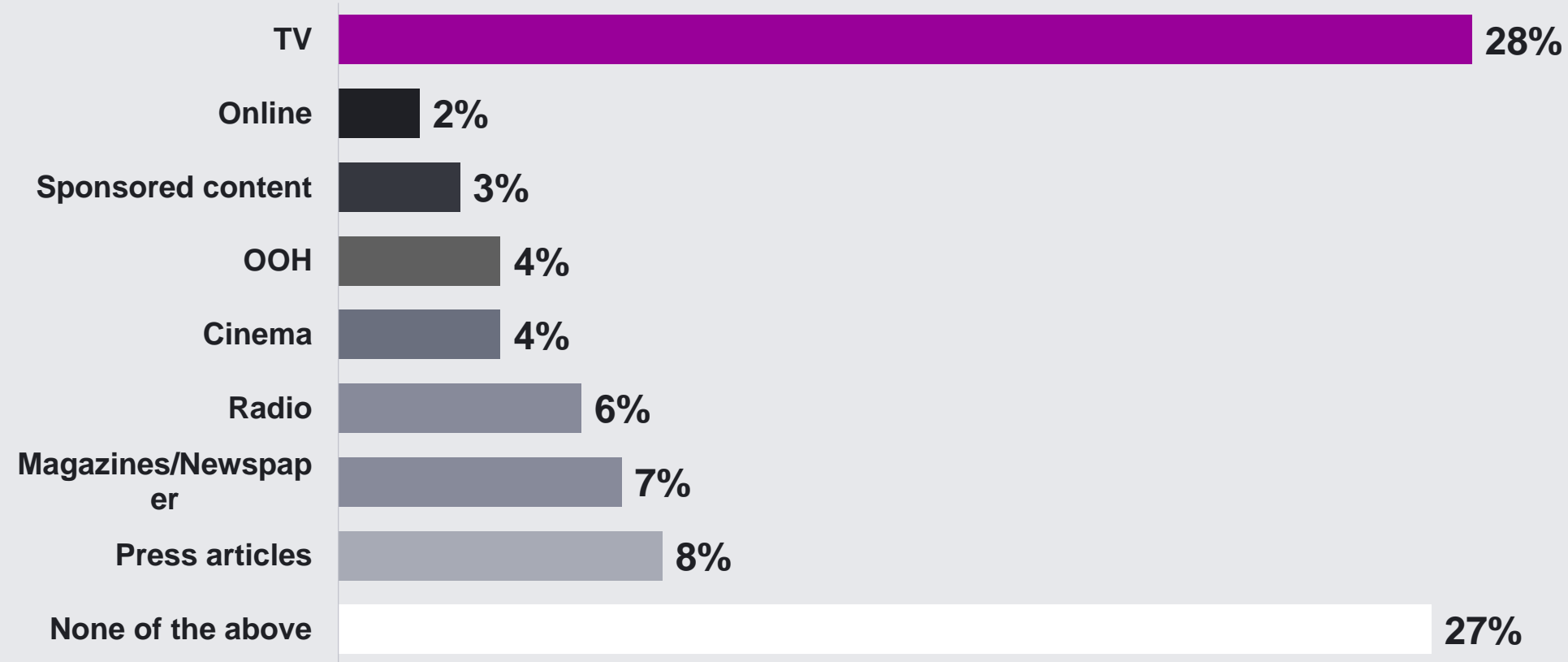


TV is by far the most trusted form of advertising

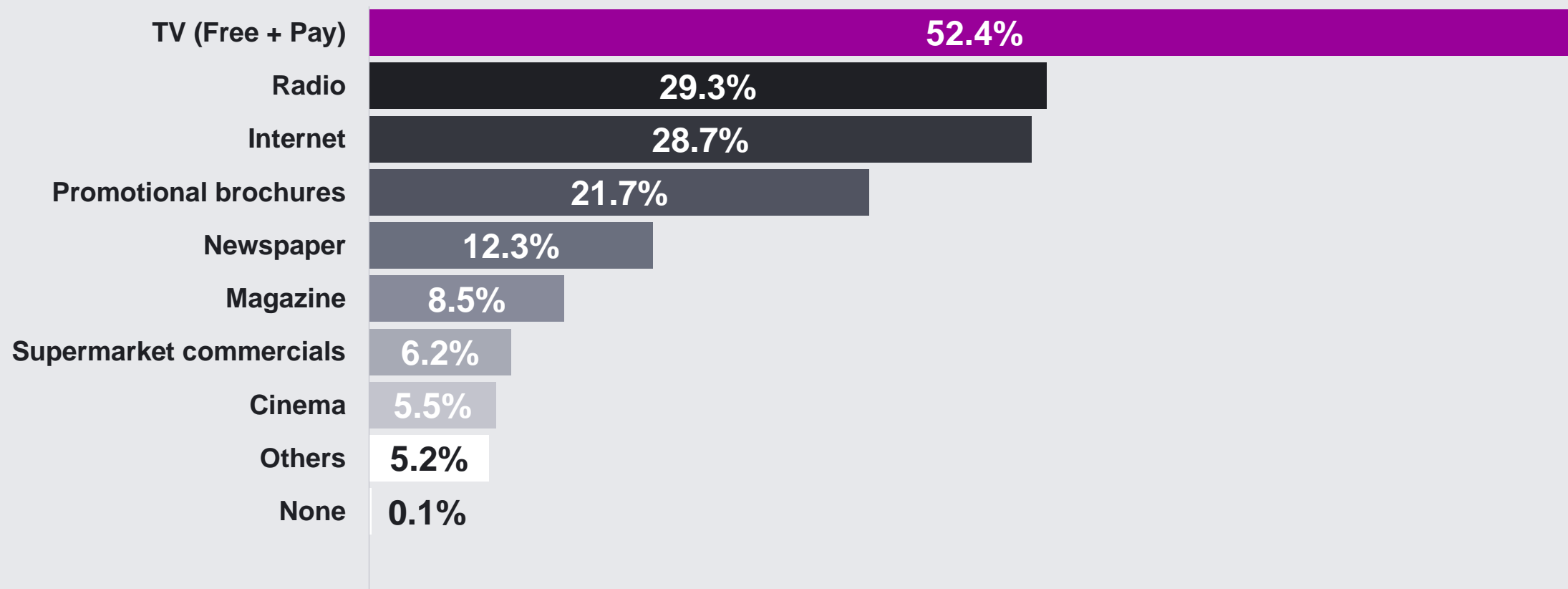


French viewers trust TV advertising the most

Q: Among these medium, which is the one you trust the most in terms of advertising?

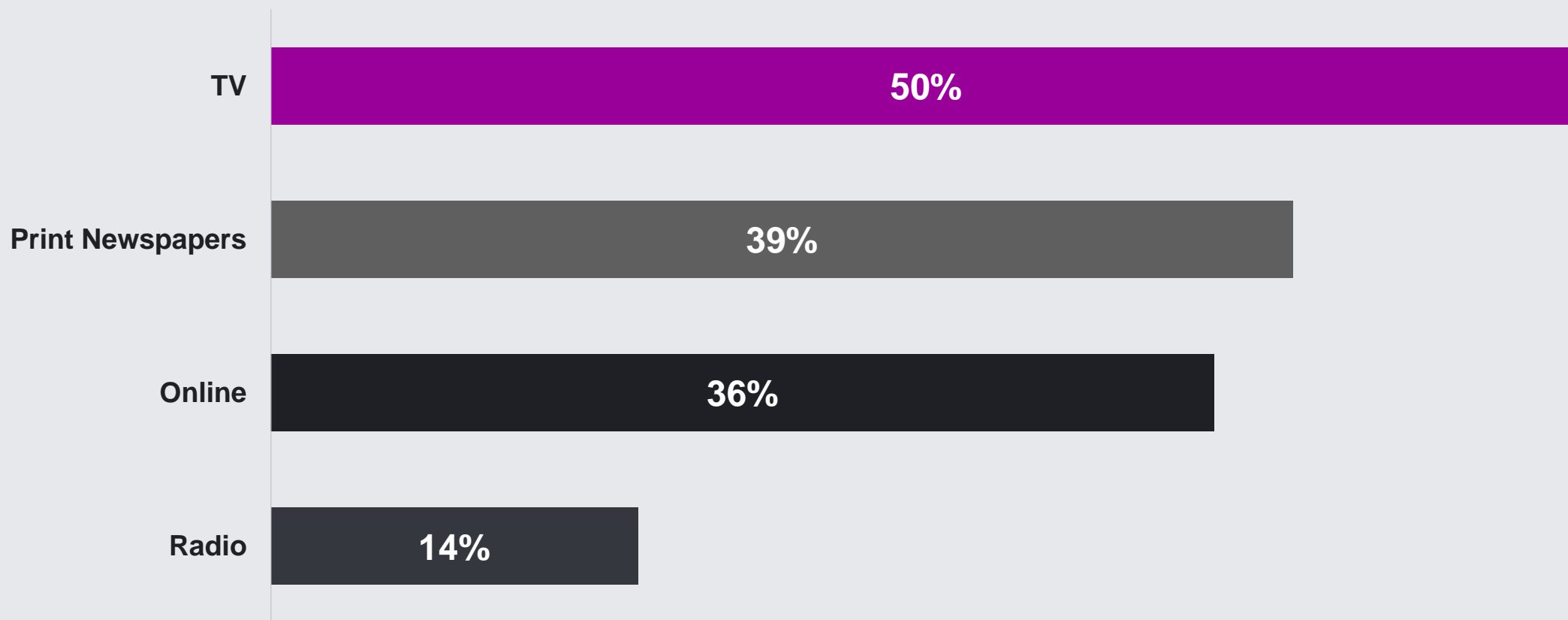


TV is by far the most trusted form of advertising



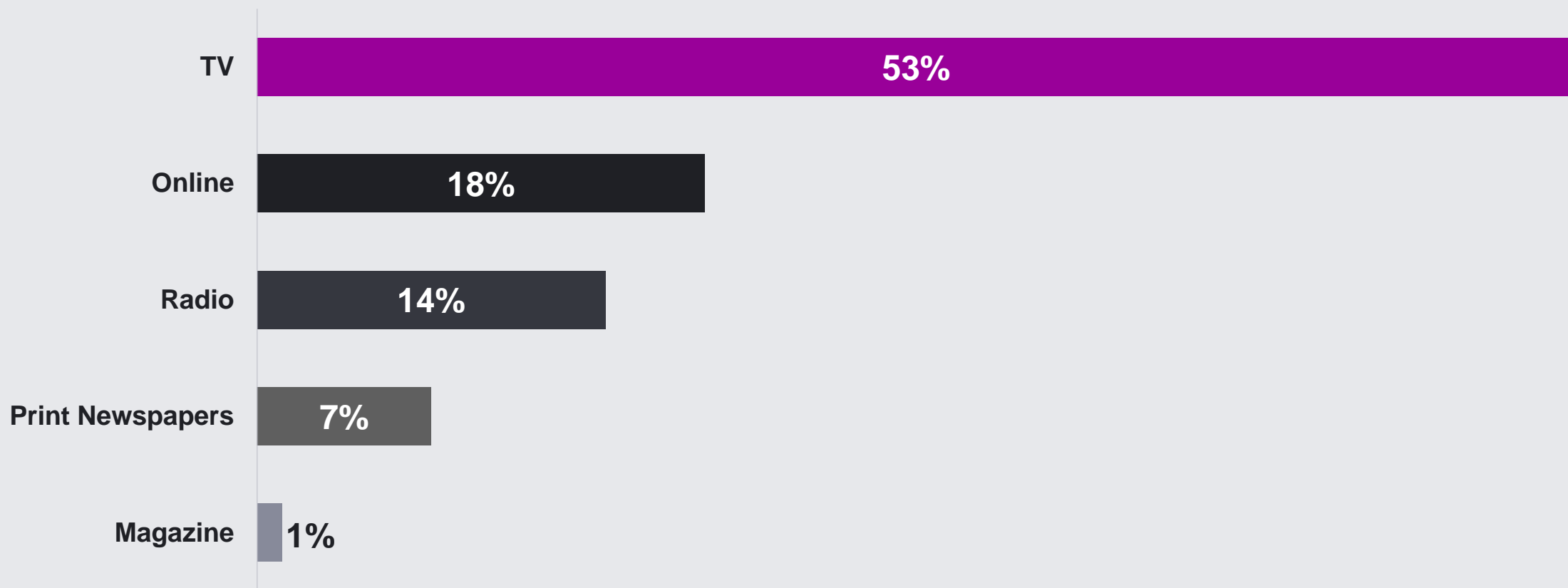
TV is by far the most trusted form of advertising

% of adults who consider the following medium as credible

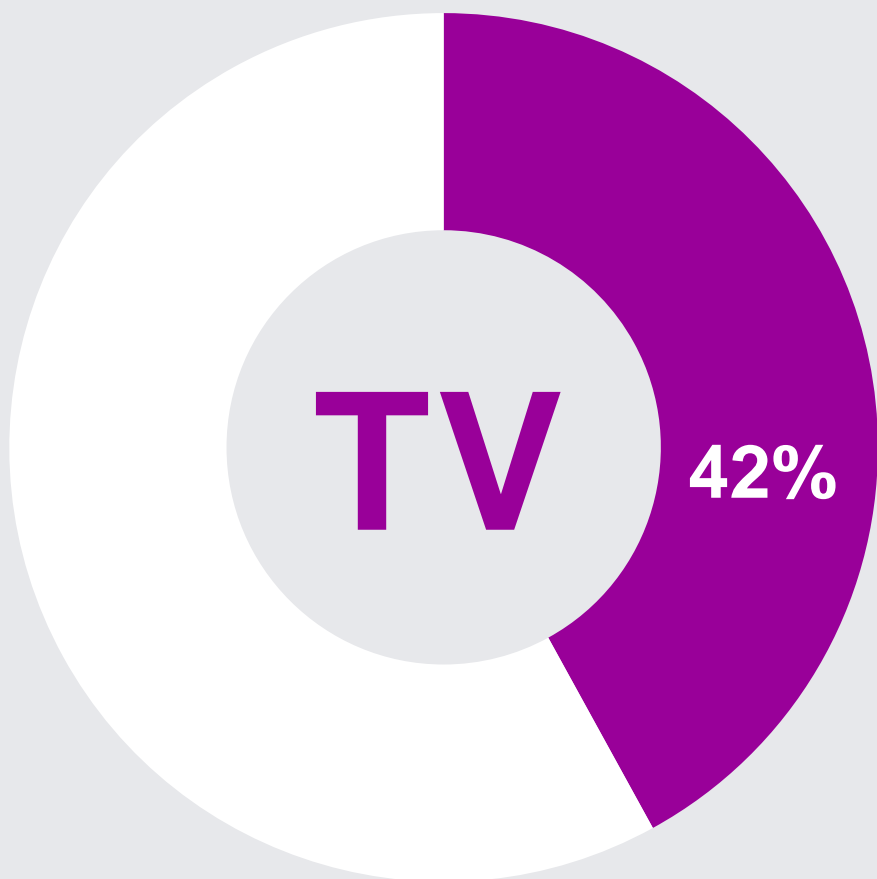


TV is by far the most trusted form of advertising

% of adults who consider the following medium as credible



TV is by far the most trusted form of advertising



Newspapers

13%

Websites

9%

Radio

8%

Magazines

8%

YouTube

6%

Social media

5%

Search

4%

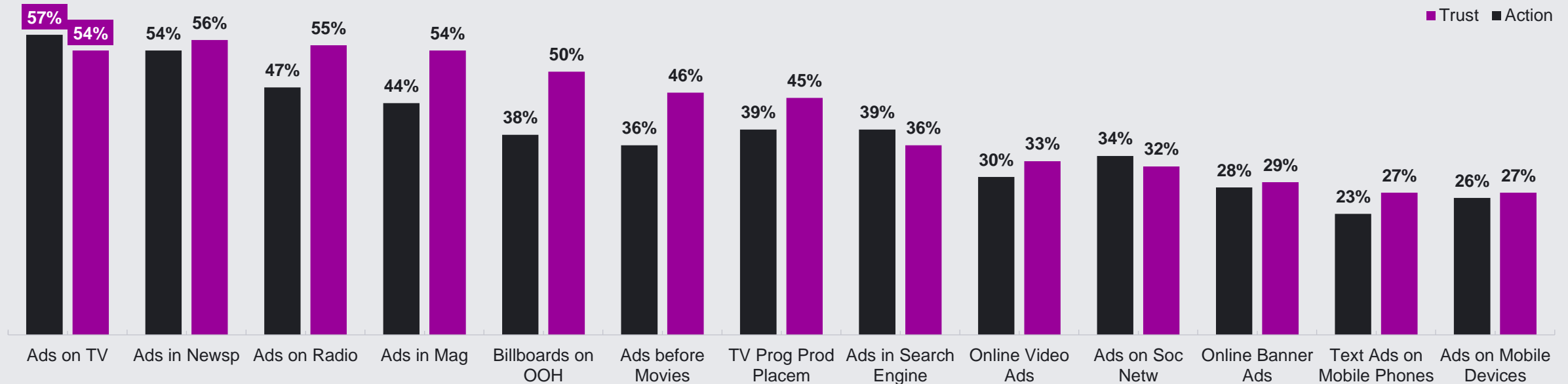
Outdoor

3%

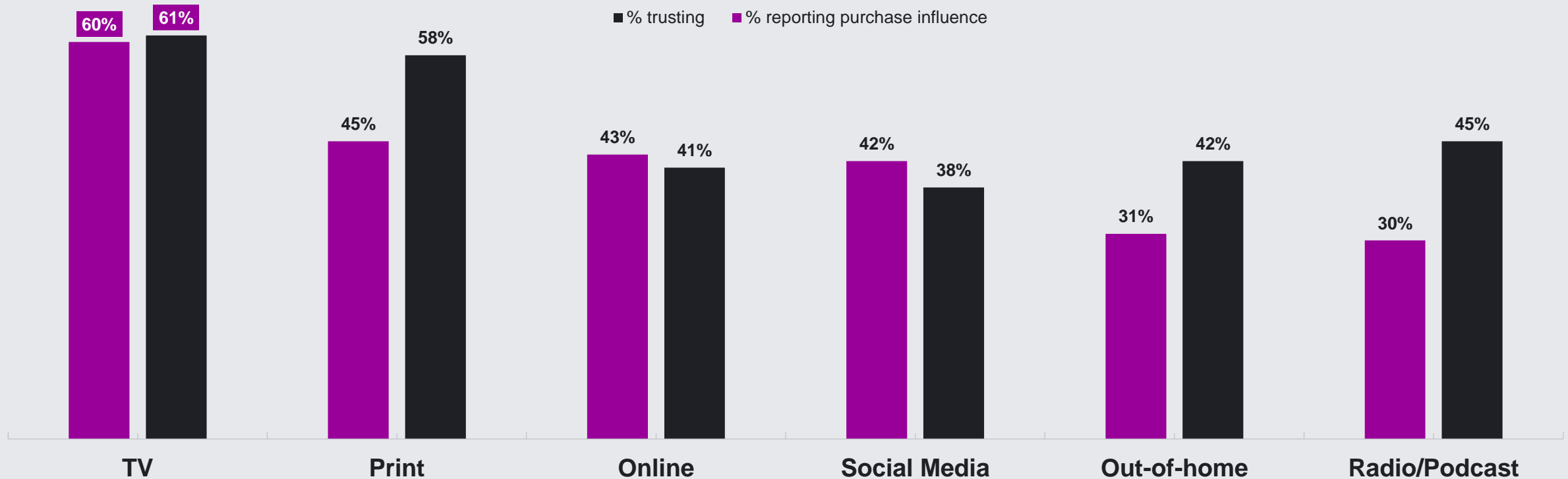
TV ads makes us act

Most importantly, the attention that TV ads garner leads to more consumer action than any other medium:

- 46% more than Search Engines
- 68% more than Social Networks
- 90% more than Online Videos

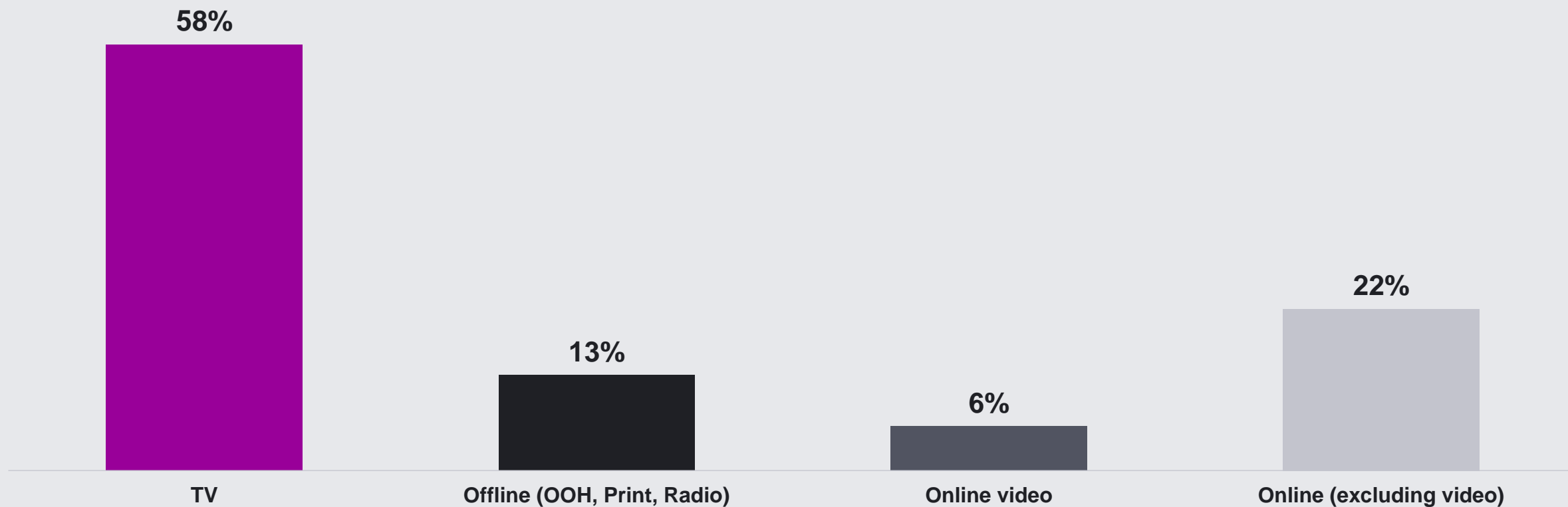


TV ads have the most influence on purchase

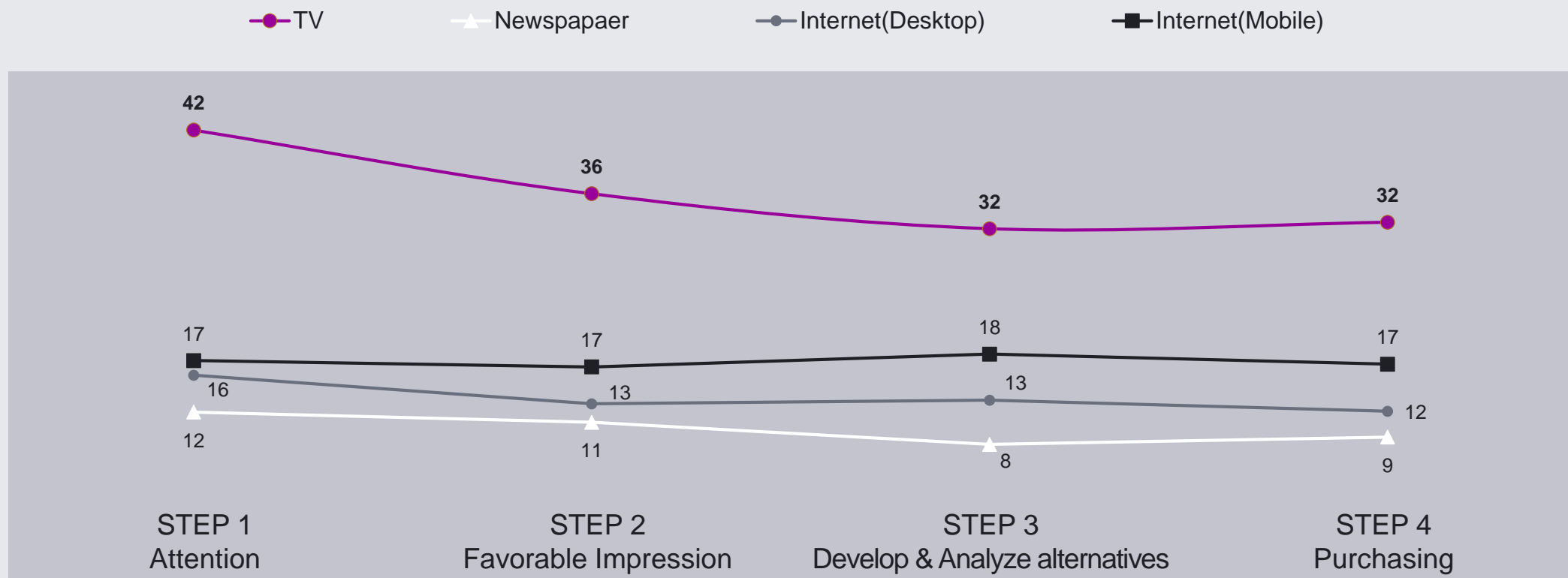


TV drives sales

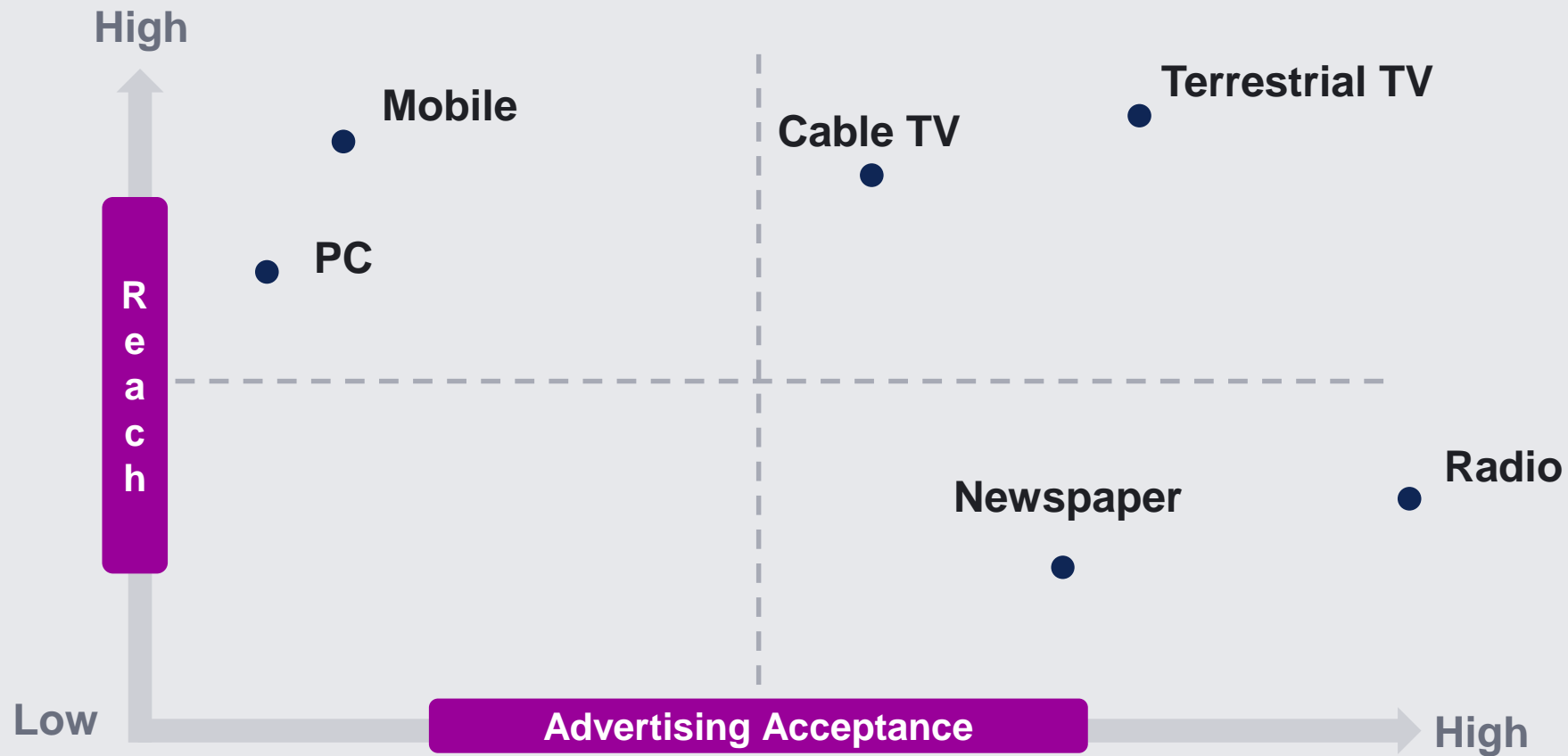
TV has a higher impact rate than all other media combined



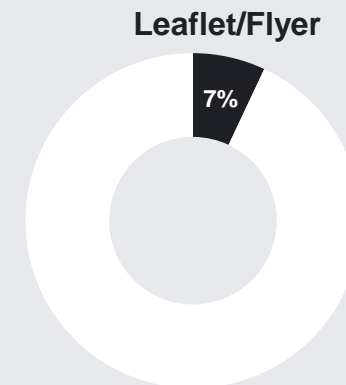
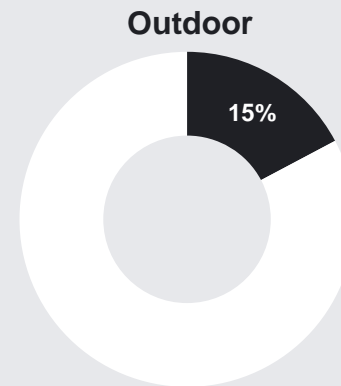
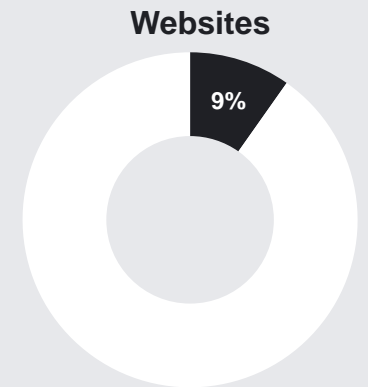
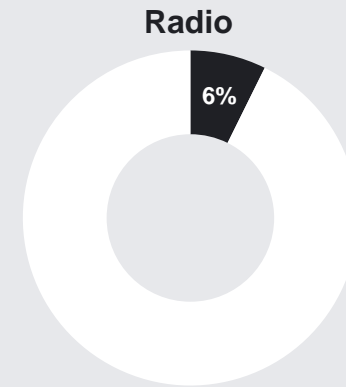
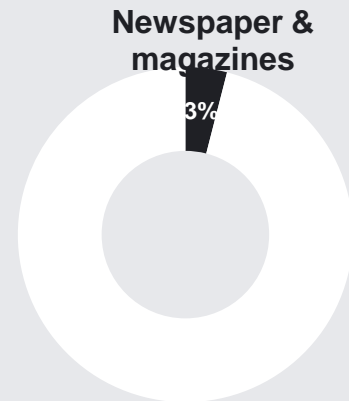
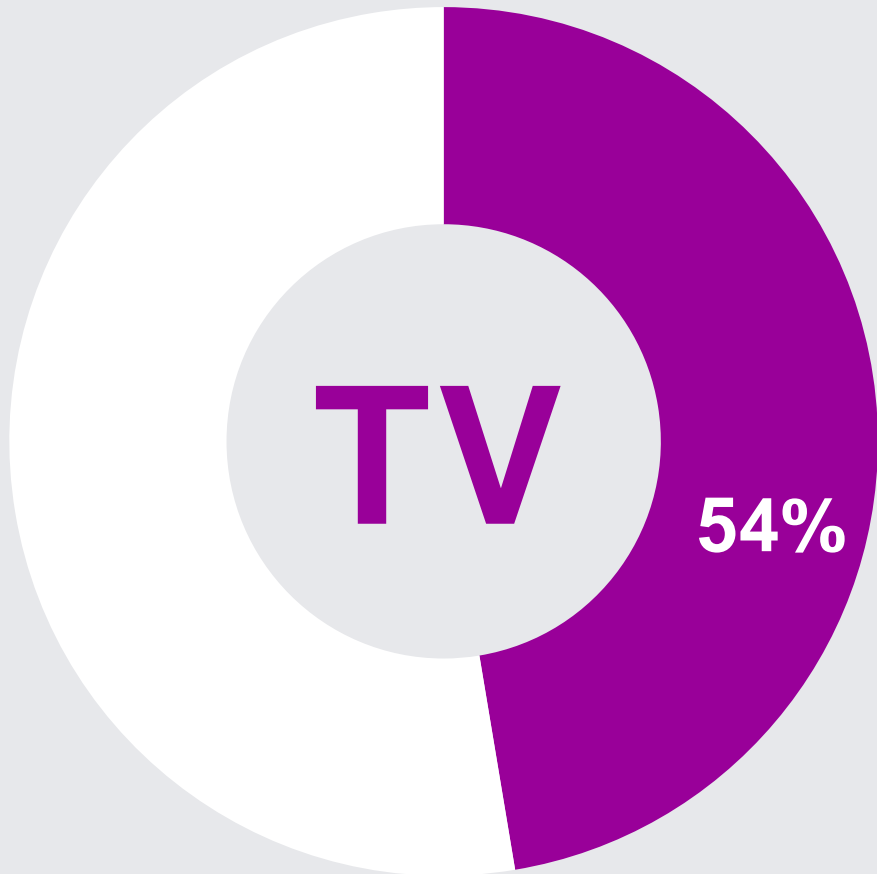
TV is the most useful media throughout all the decision-making process



TV is the most powerful media in terms of reach and advertising acceptance



TV advertising gets the most attention

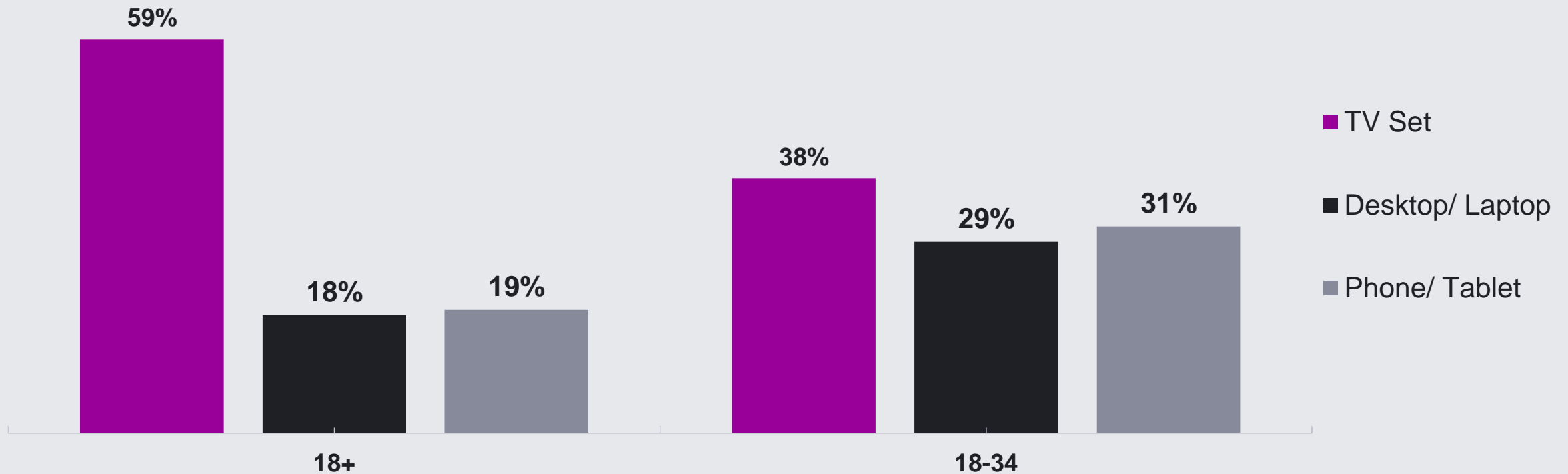


TV advertising gets the most attention

How does TV compare to video ads on other platforms?

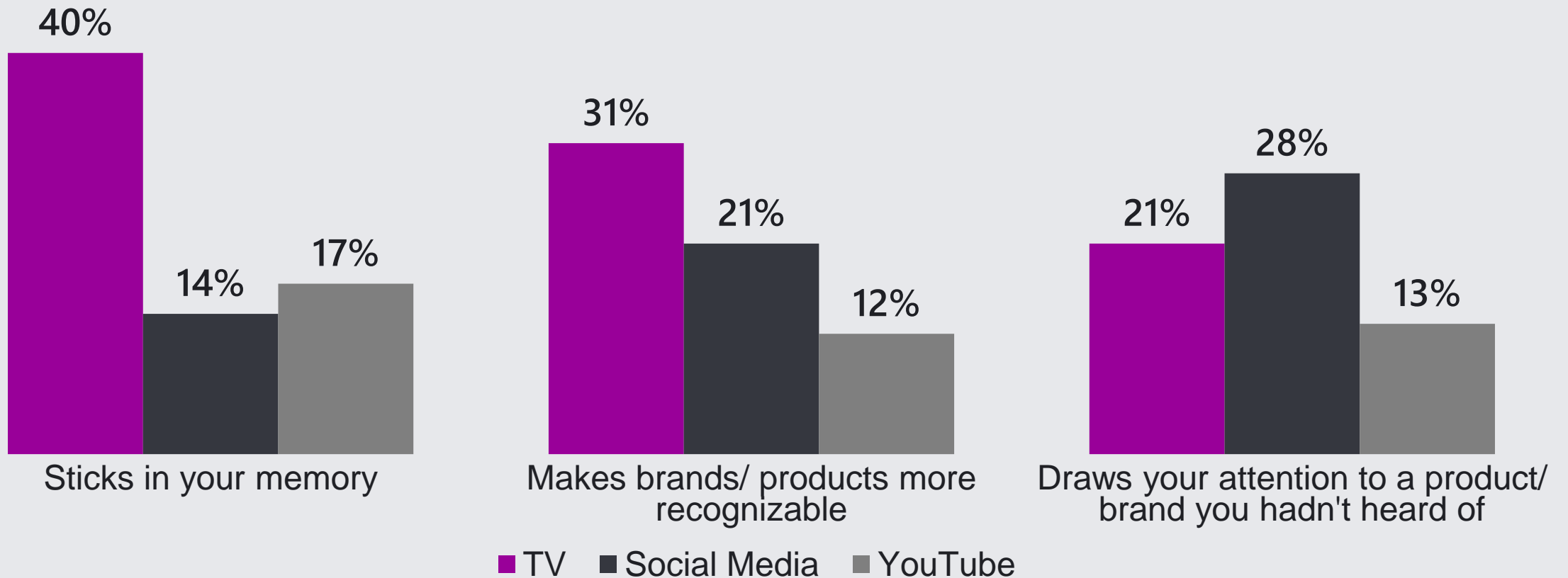
Canadians are most likely to watch video advertising when it's on a TV set.

- 3x more likely to watch than on a desktop or laptop (31% more likely for Millennials)
- 3x more likely to watch than on a mobile device (23% more likely for Millennials)



TV advertising gets the most attention

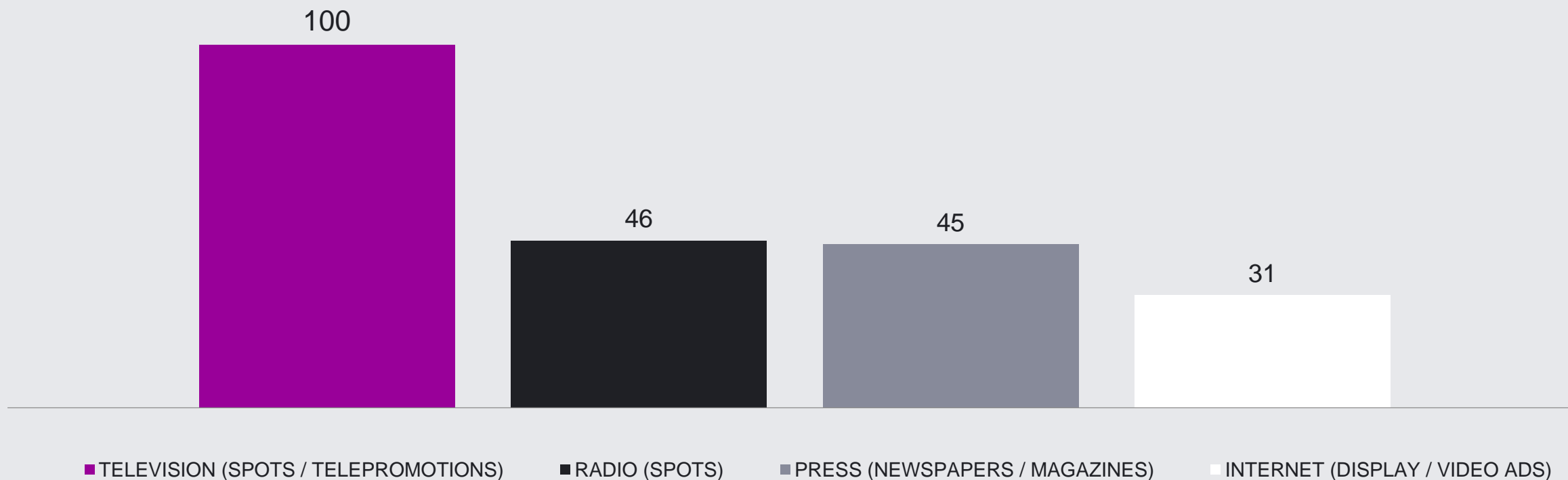
For Millennials, TV advertising is the most likely to stick in memory and make brands recognizable



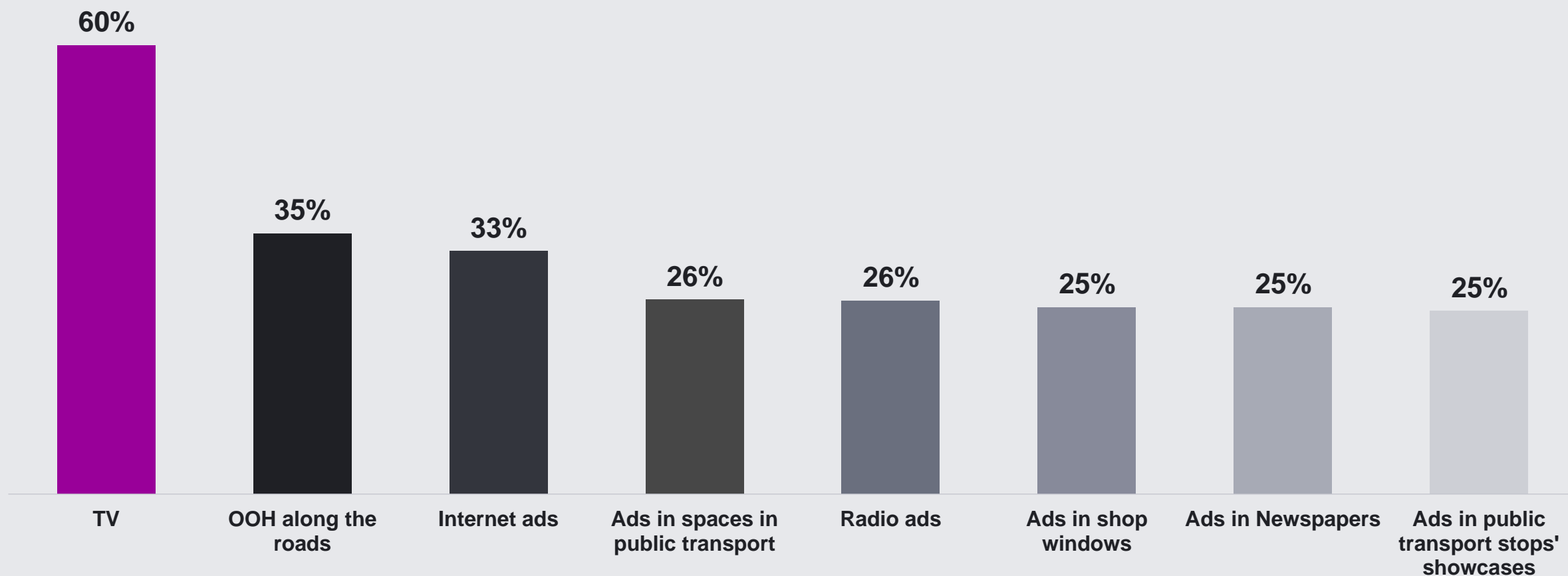
TV advertising gets the most attention

How much attention do you usually pay to...
(Much + Enough attention)

Concentration index



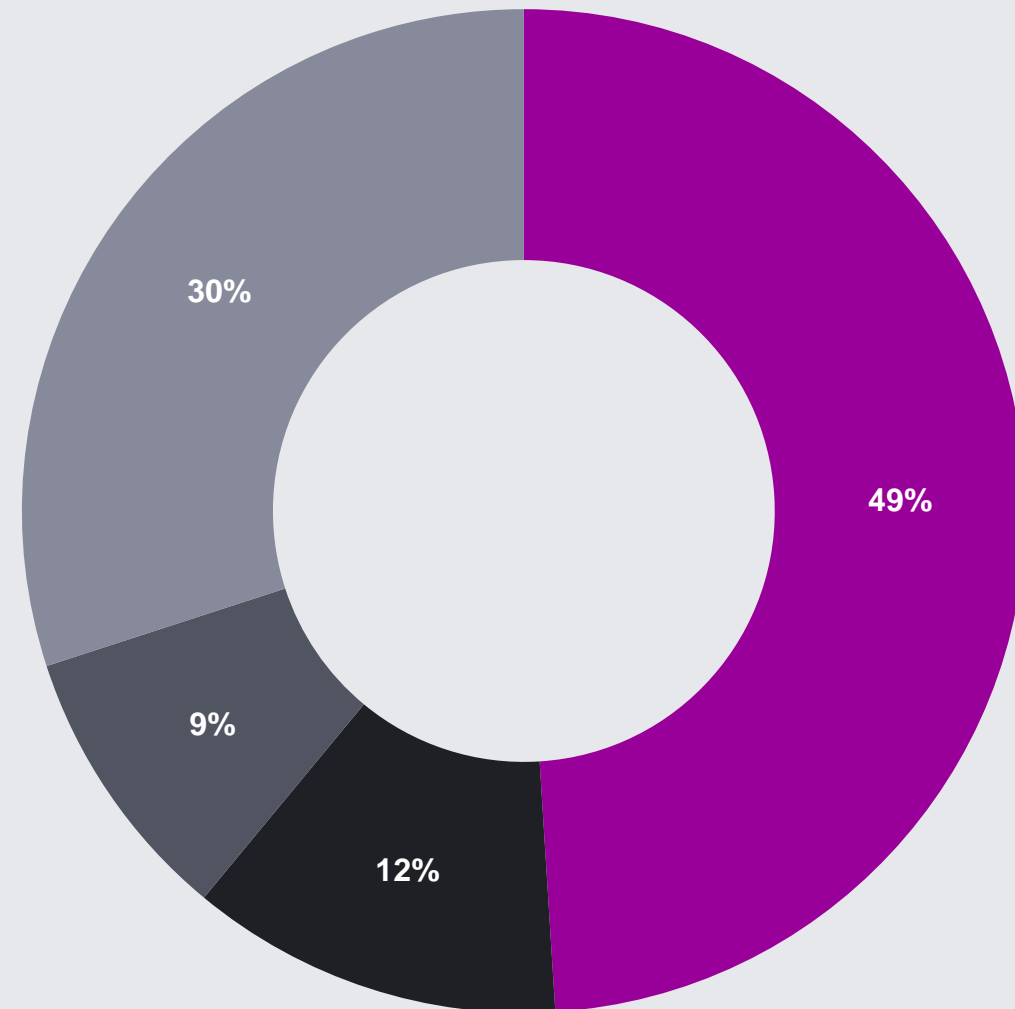
TV advertising gets the most attention



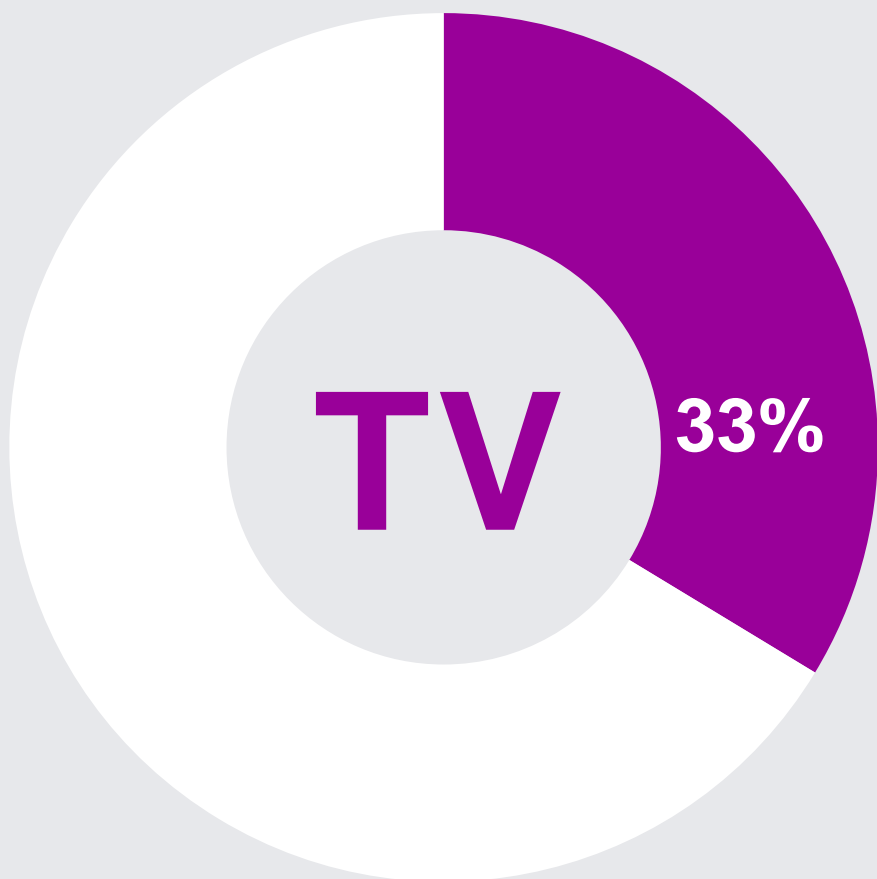
TV advertising gets the most attention

Q: On which media, do you pay more attention when watching video?

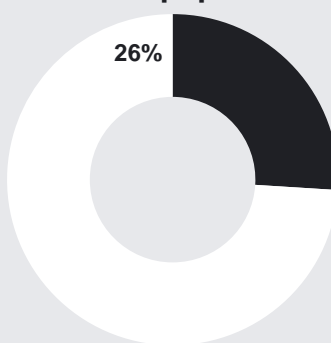
- TV
- Mobile
- PC
- No difference



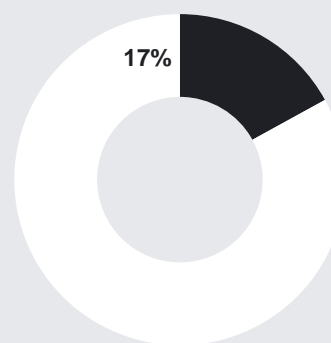
TV advertising gets the most attention



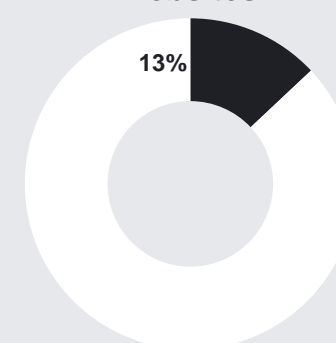
Newspapers



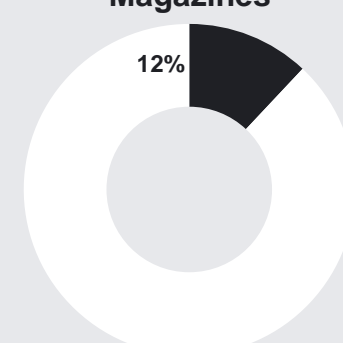
Radio



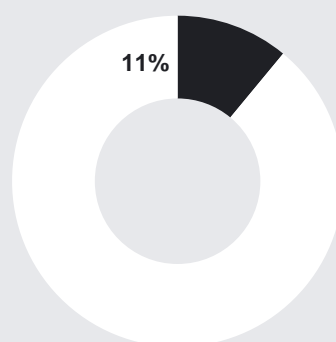
Websites



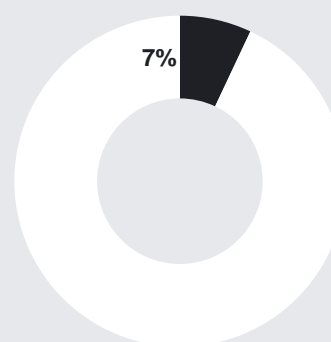
Magazines



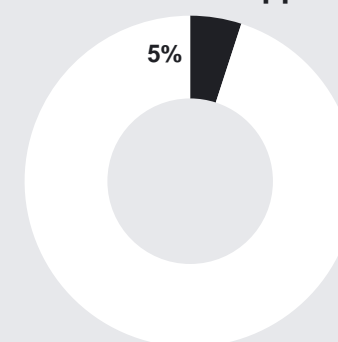
Outdoor



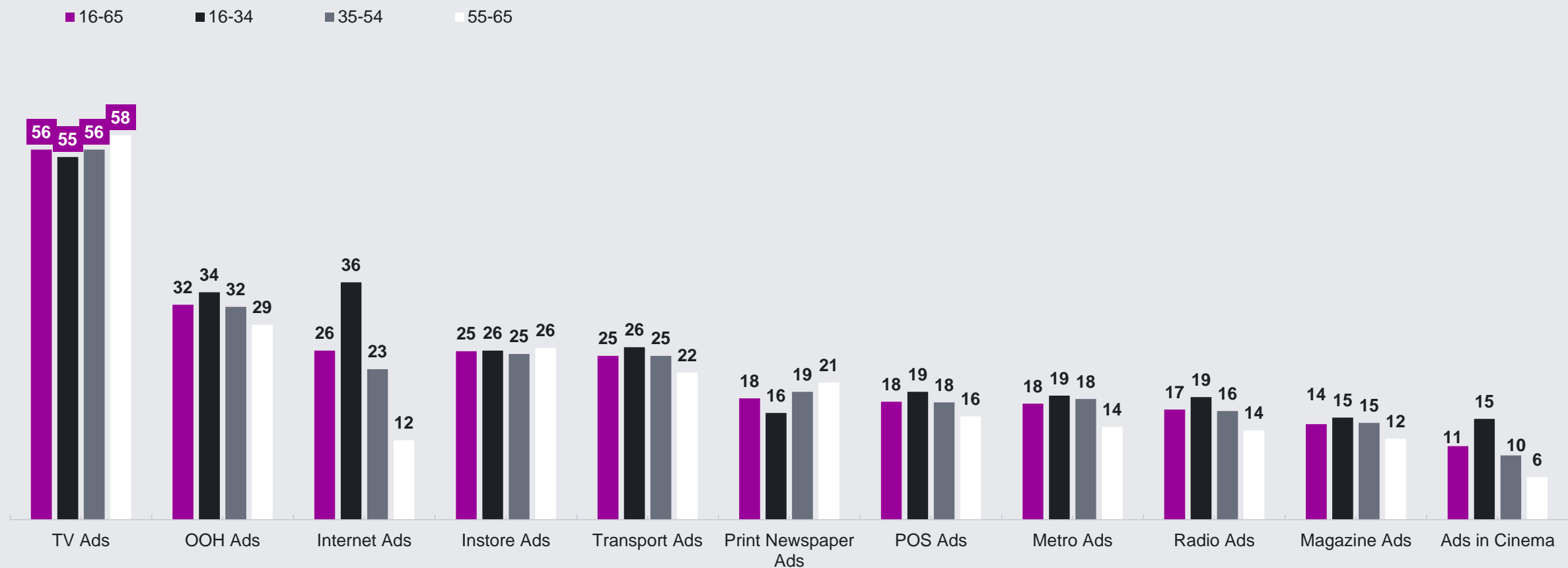
Social media



Mobile apps

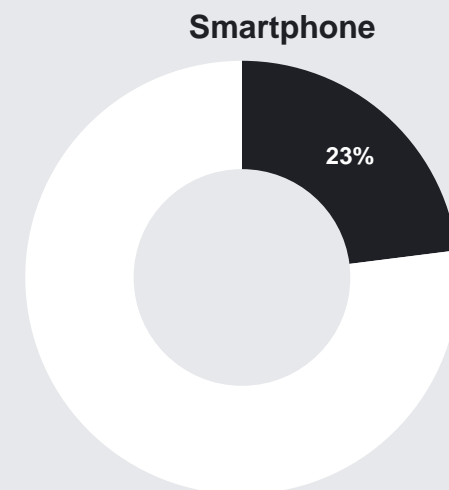
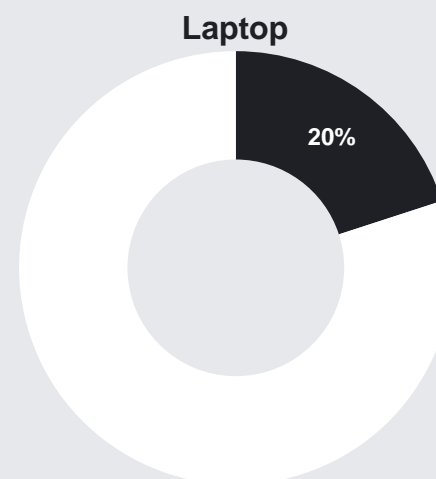
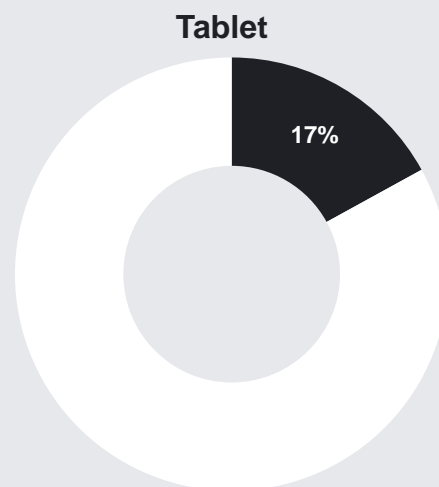
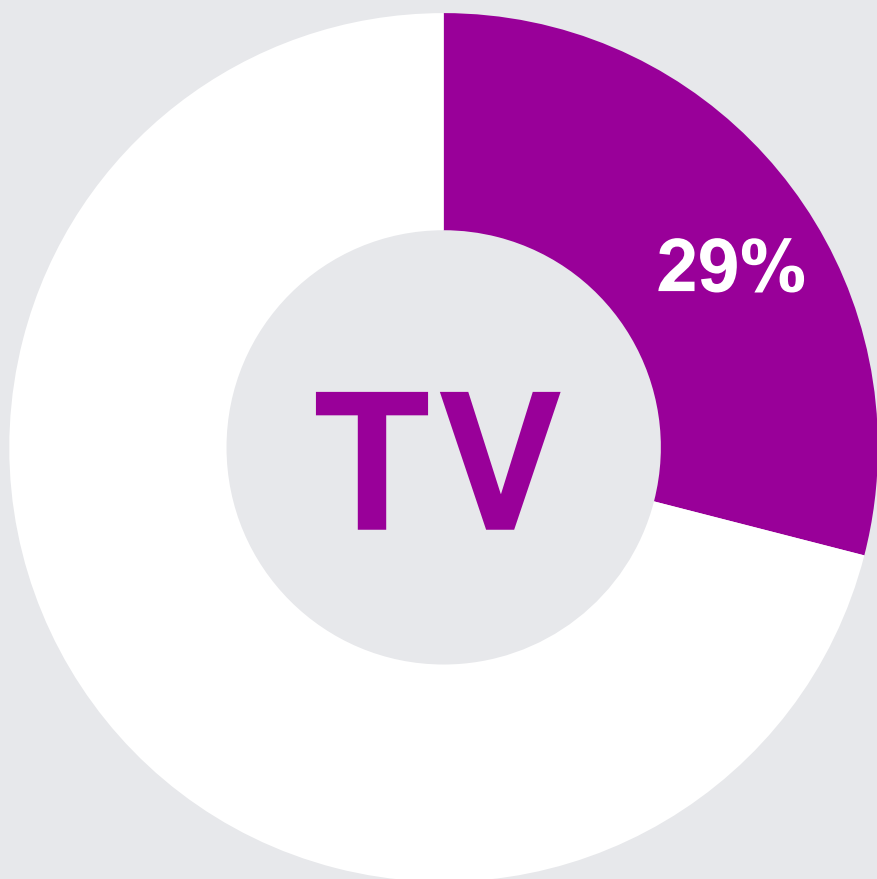


TV advertising gets the most attention



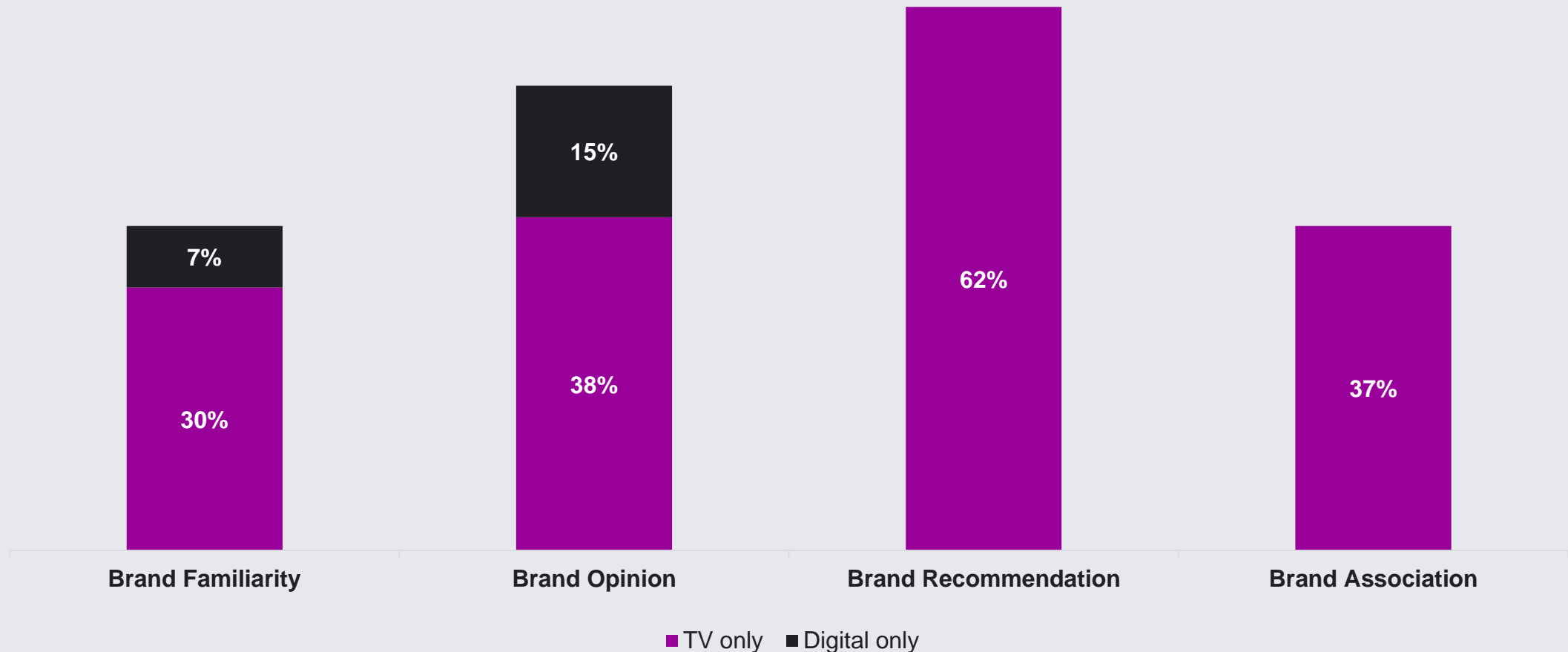
TV advertising gets the most attention

% of viewers who reported full or nearly-full attention



TV ads are more impactful

% Lift driven by TV only & Digital only



**TV is so impactful that
it accounts for the
majority of all video
advertising time**



In Austria, TV accounts for 88% of all video advertising time

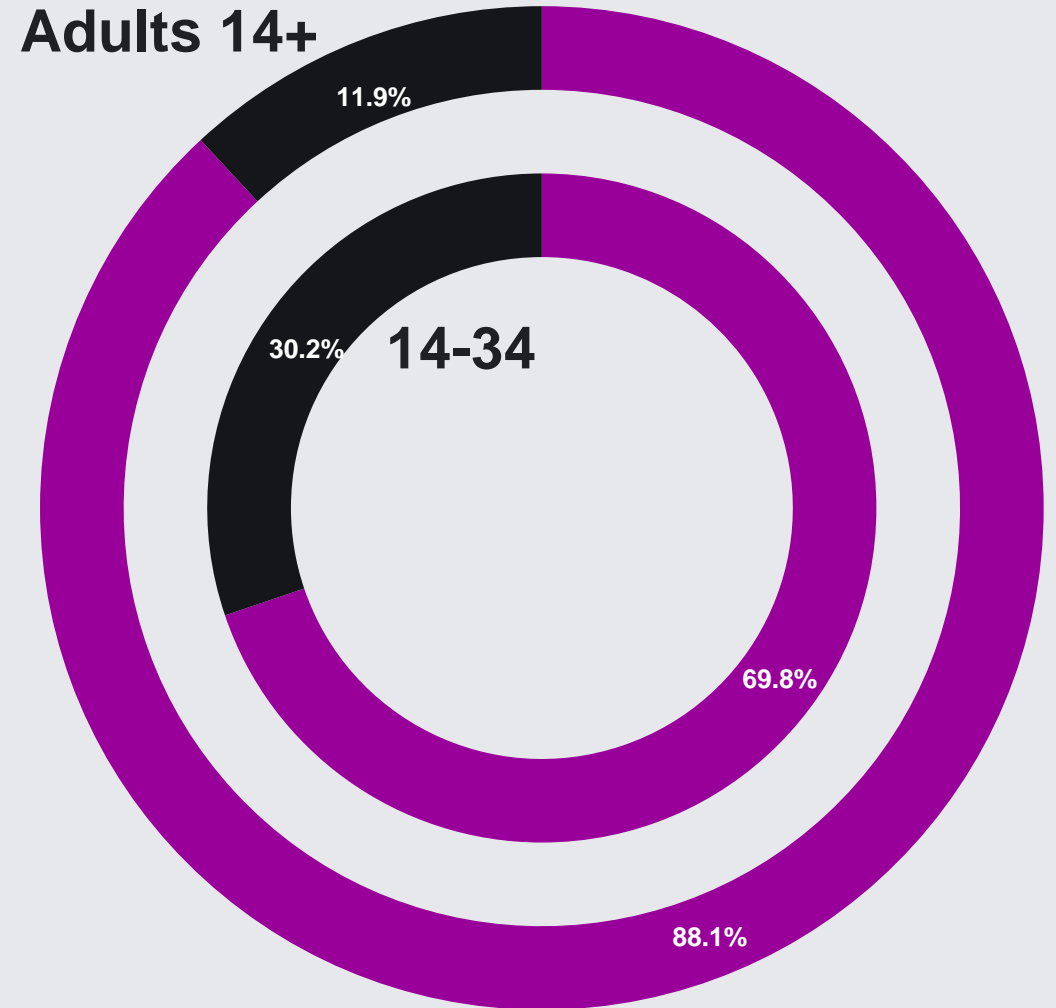
Average video advertising time per day

Adults 14+: 220 minutes

14-34: 190 minutes

■ TV content

■ Video



In Italy, TV accounts for 98% of all video advertising time

Average video advertising time per day

Adults 15+: 25 minutes

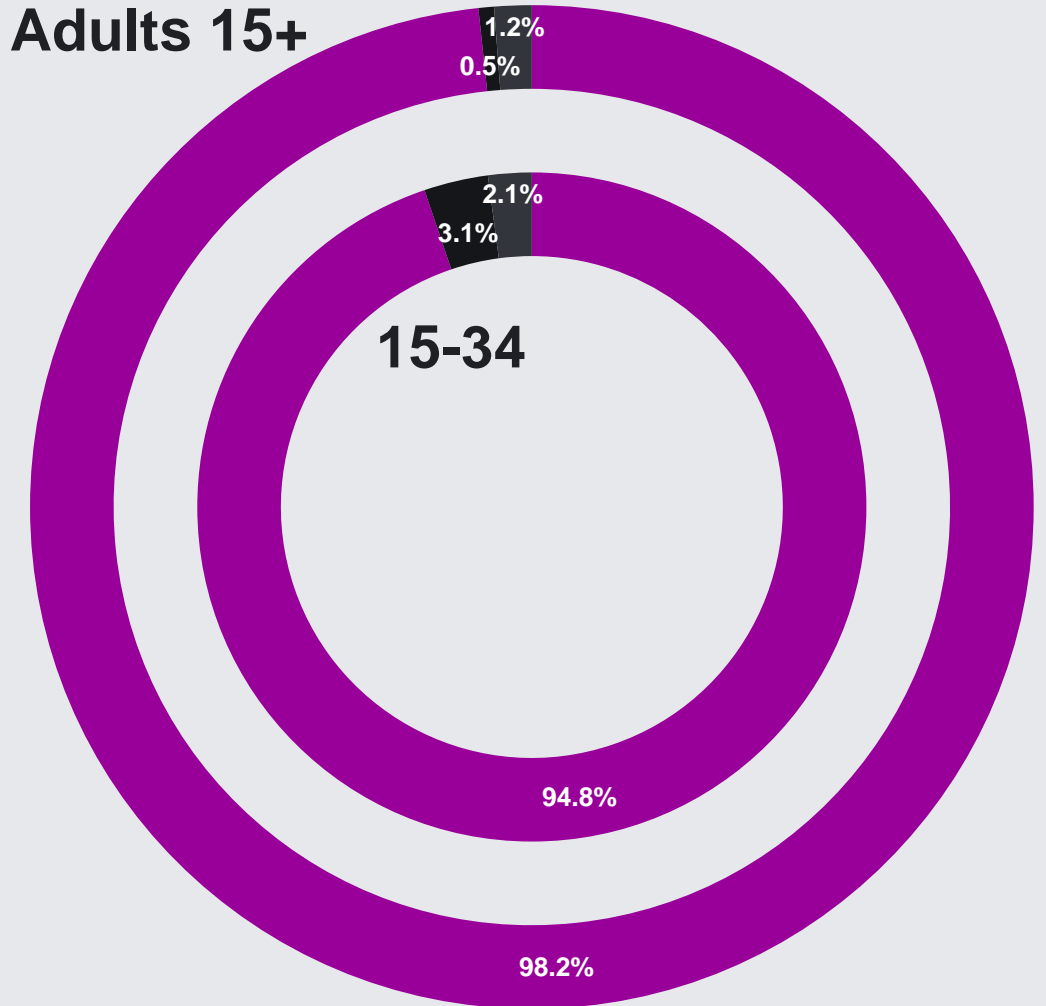
15-34: 15 minutes

■ Live TV

■ Others

■ YouTube

Adults 15+



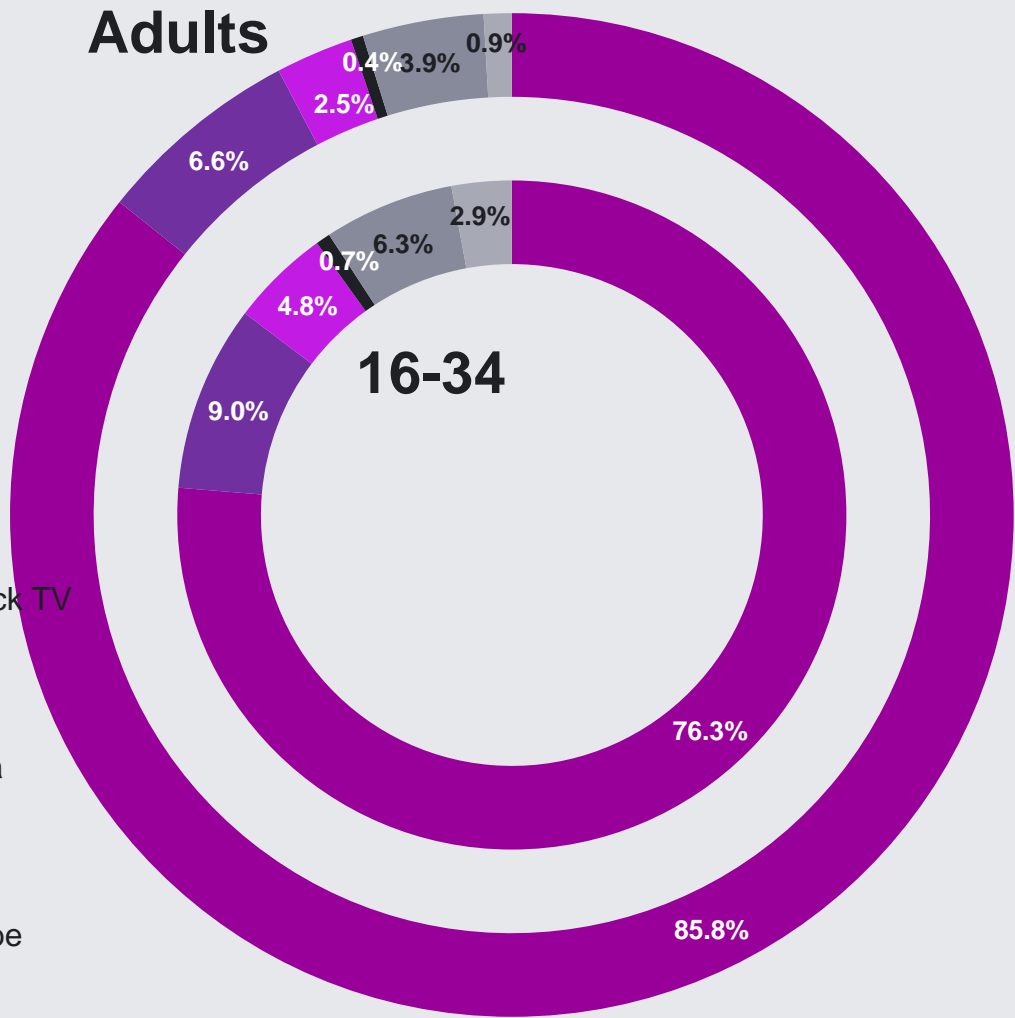
In the UK, TV accounts for 95% of all video advertising time

Average video advertising time per day

All individuals: 21 minutes

16-34: 14 minutes

- Live TV
- Playback TV
- Broadcaster TV
- Cinema
- Other online
- YouTube



Effectiveness

Advertisers invest in TV advertising because it pays back



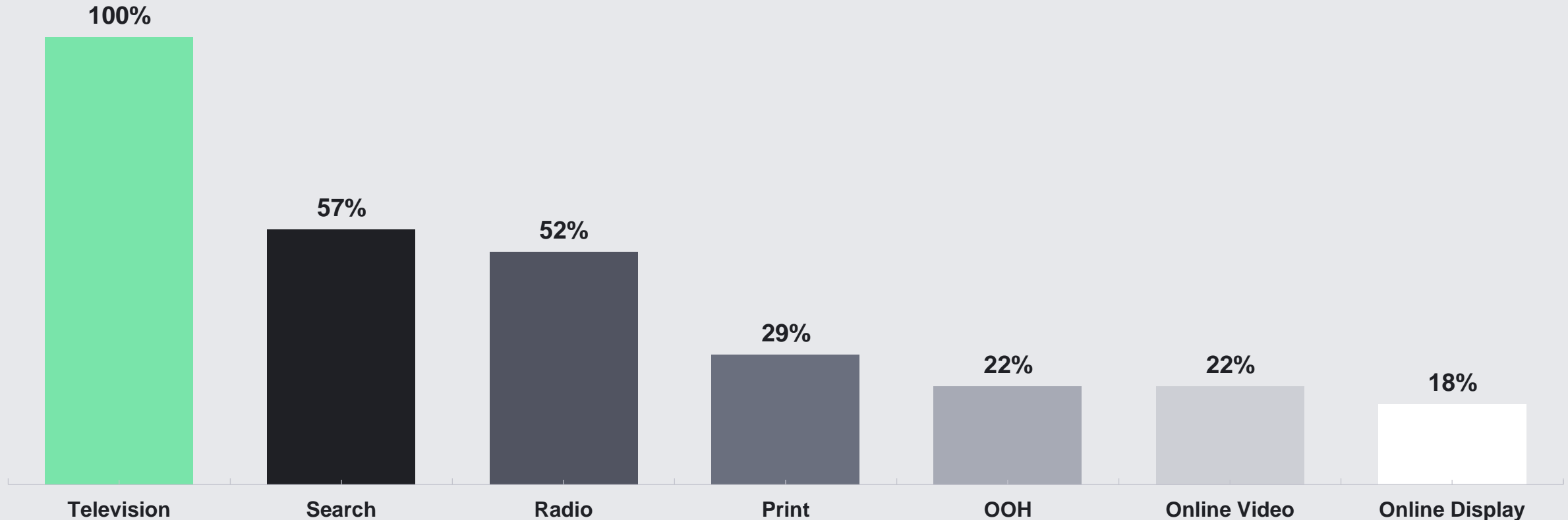
“According to the ad industry, TV has been ‘dead’ for 10 years. But we haven’t found that to be true. TV remains the top mass-media channel for us and it has a great impact across sectors. Today, we attribute TV across continents and optimize campaigns at a much more granular level.”

Aleksej Koscejev, Global Head of Offline and Performance Marketing, Delivery Hero
September 2018

TV is the most efficient media channel

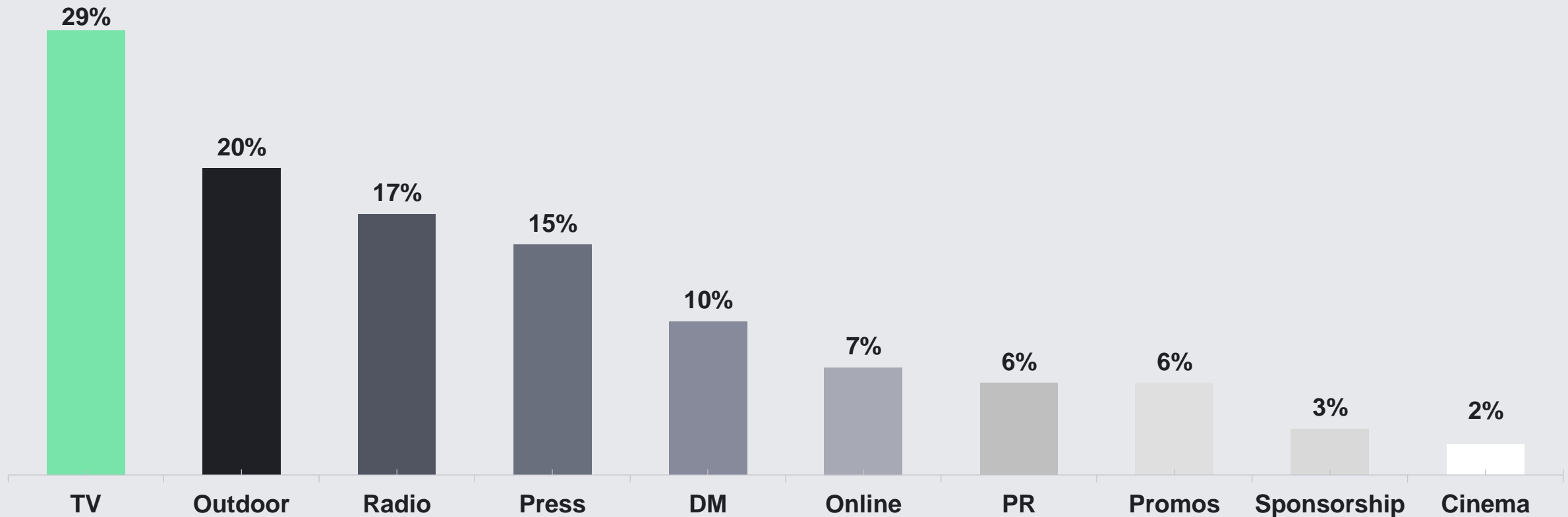
When indexed across advertisers drawn from 4 of the biggest sectors – FMCGs, Auto, Finance, and E Commerce. Tv is almost twice as efficient as Search – which index's 57% of Tv's efficiency.

Overall Efficiency: Media Channel ROI Indexed to TV



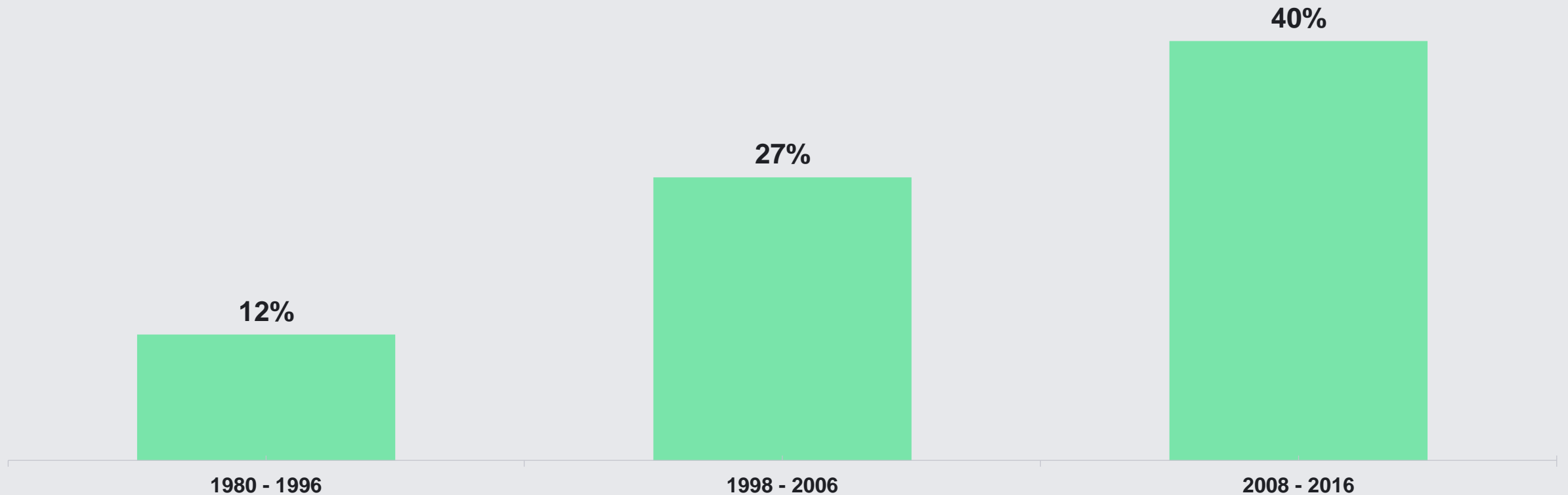
TV is the most effective medium

Effect of adding a medium to the mix - % increase in average number of very large business effects from adding TV (e.g. market share, brand loyalty, profit, sales, etc.)

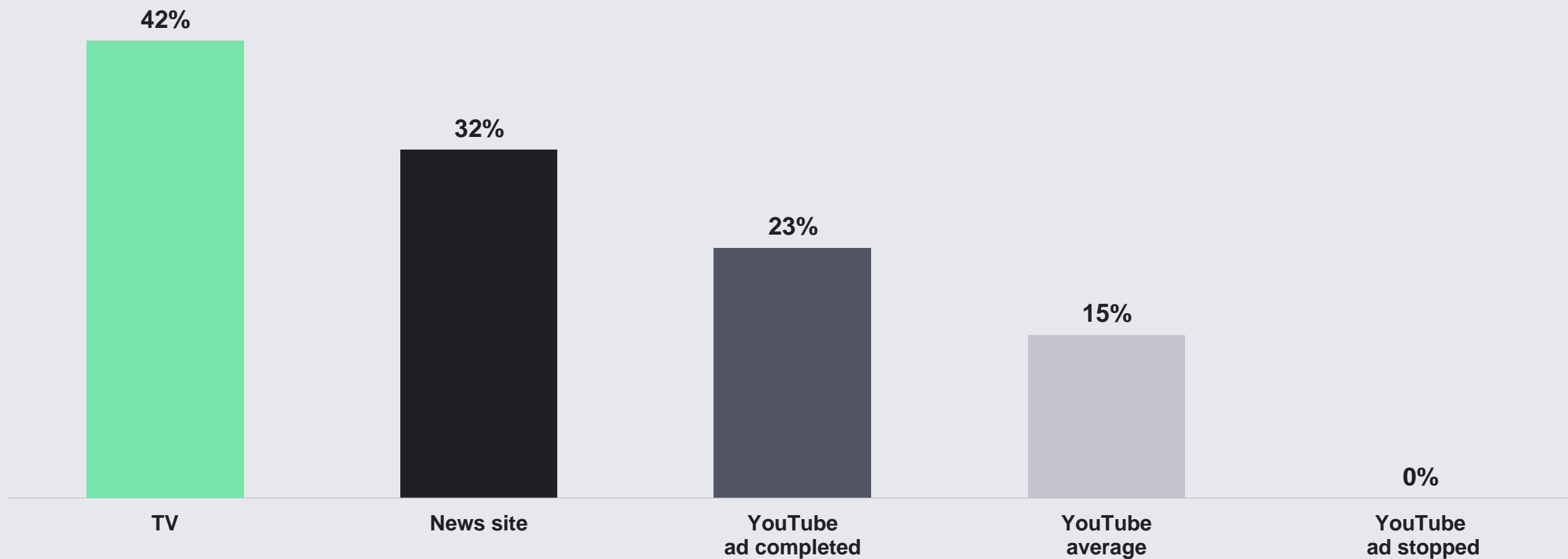


TV is becoming more effective

% increase in average number of very large business effects from adding TV (e.g. market share, brand loyalty, profit, sales, etc.)

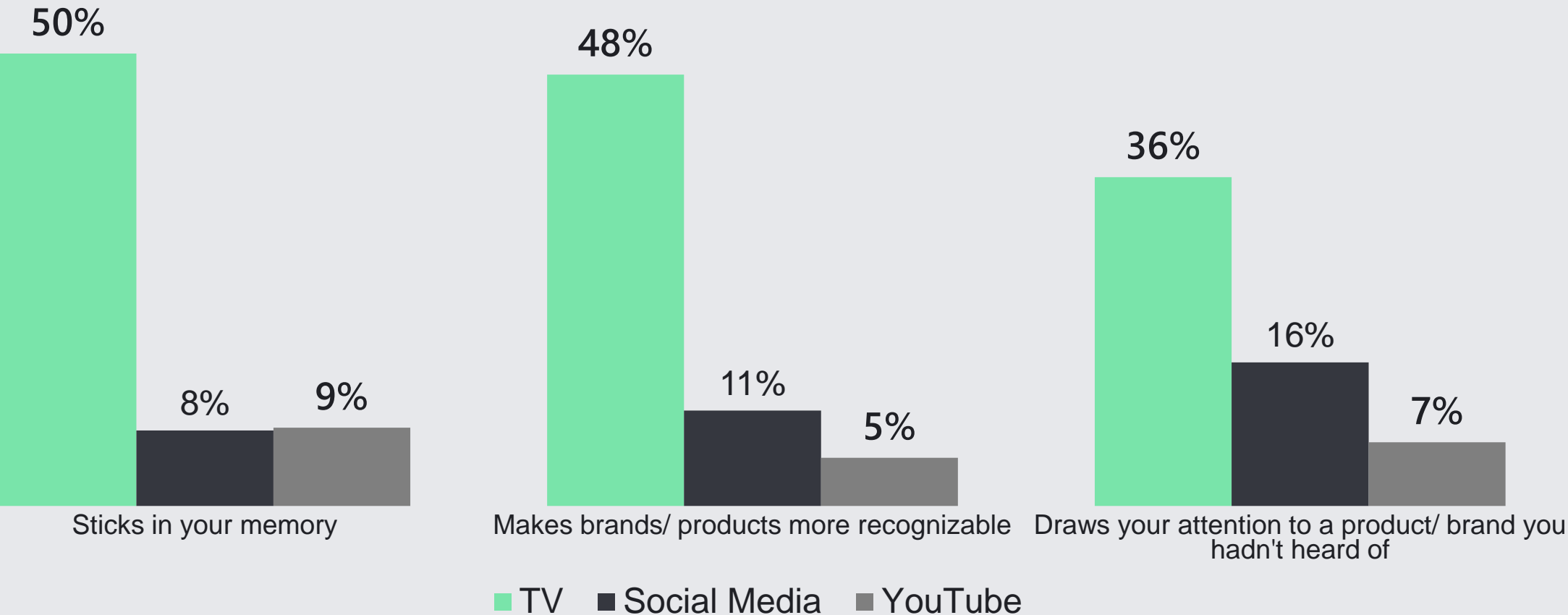


TV generates almost thrice the brand recall of YouTube



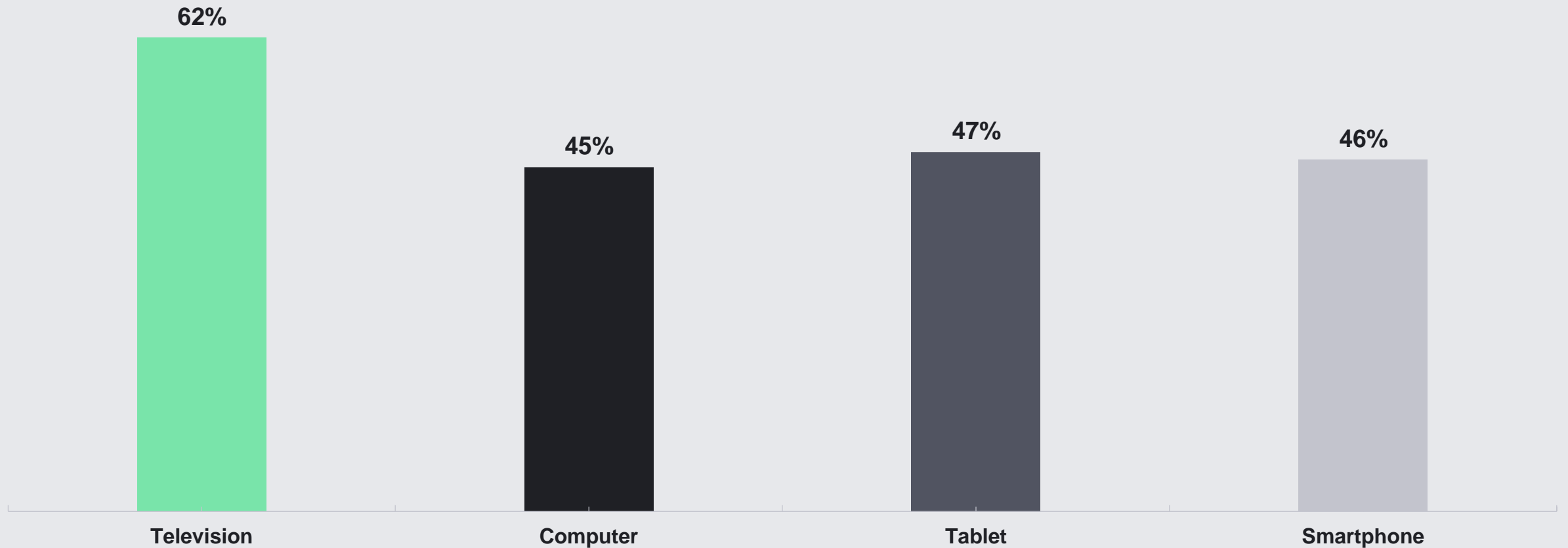
TV ads are the best for brand building

TV advertising is the most memorable, draws the most attention, and makes brands more recognizable



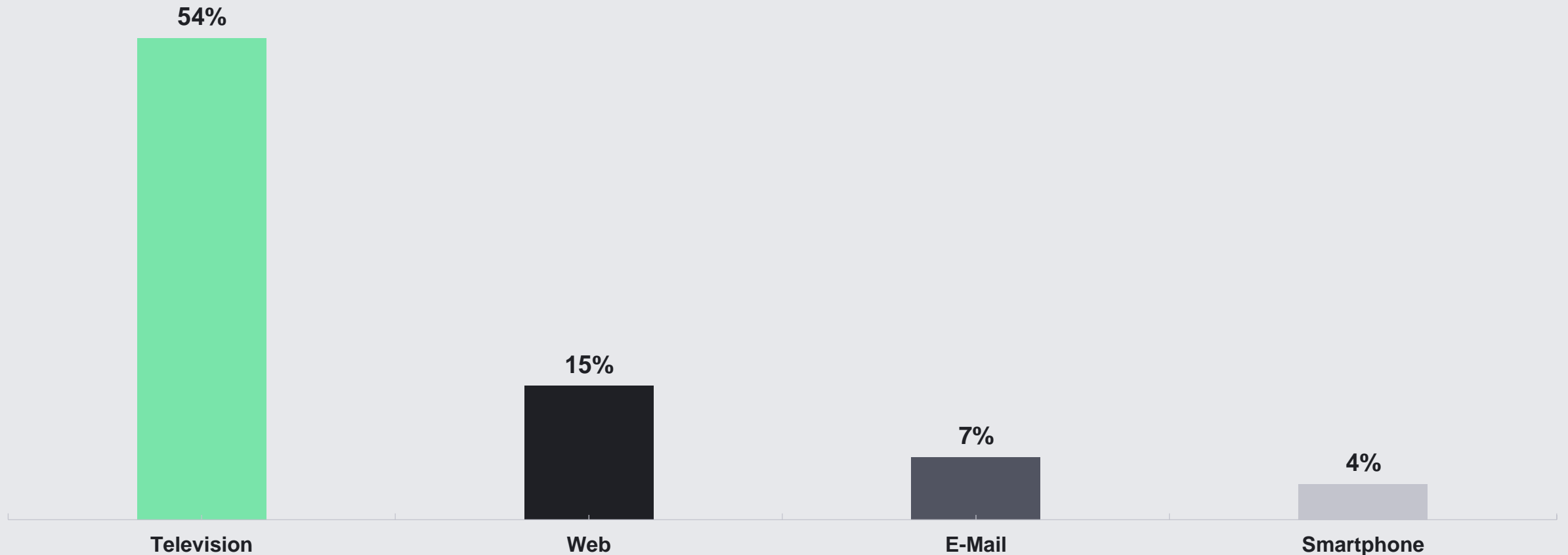
TV ads are the best for brand recall

Percent who correctly recall half or more of advertisers



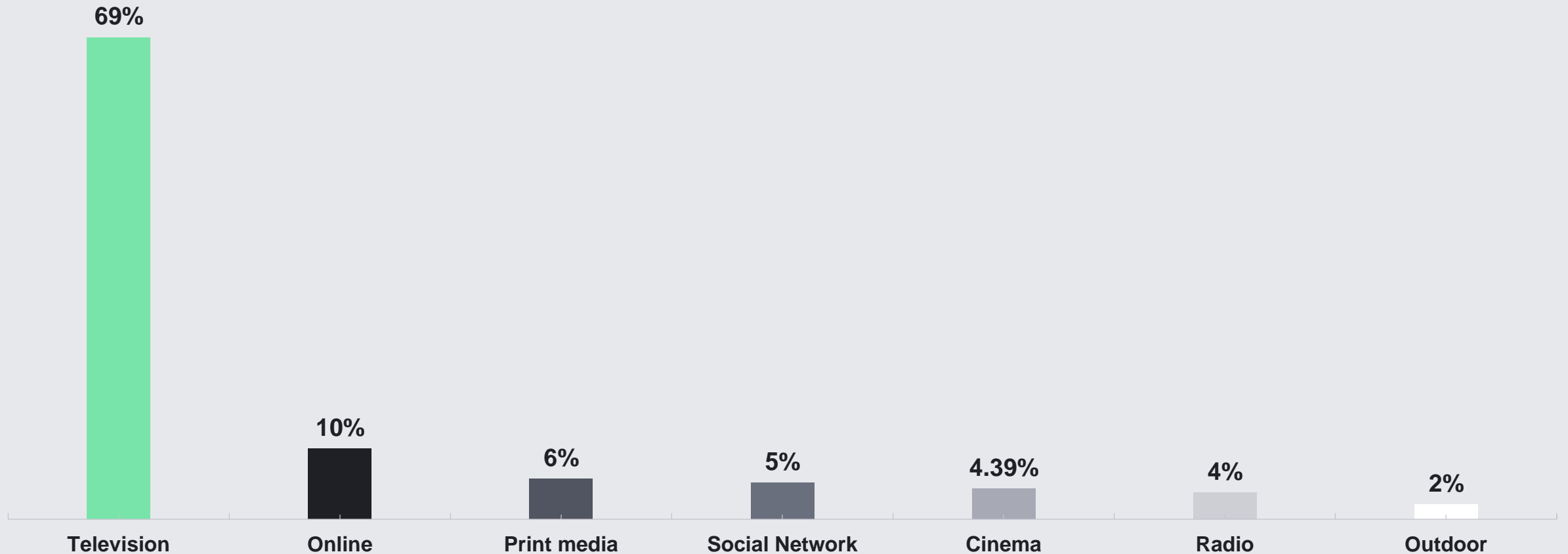
TV ads are the best for brand recall

Q: What kind of advertisements is the most memorable to you?"



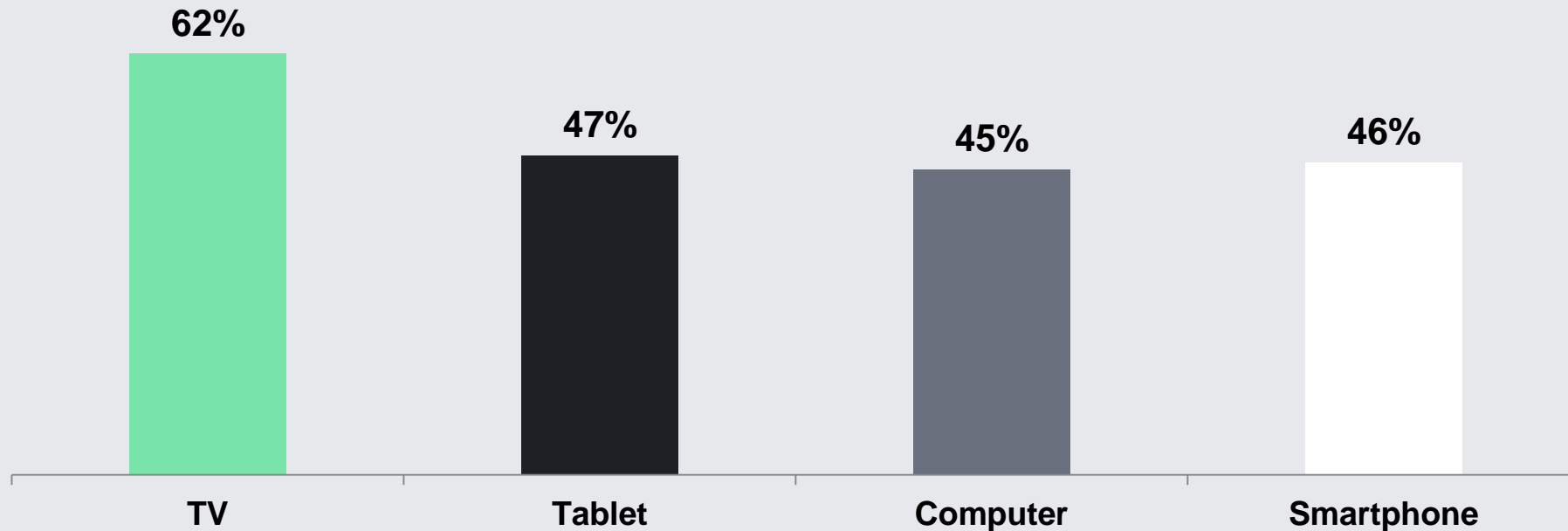
TV ads are the best for brand recall

Which media do you think that the advertising generates more recall of the brands?



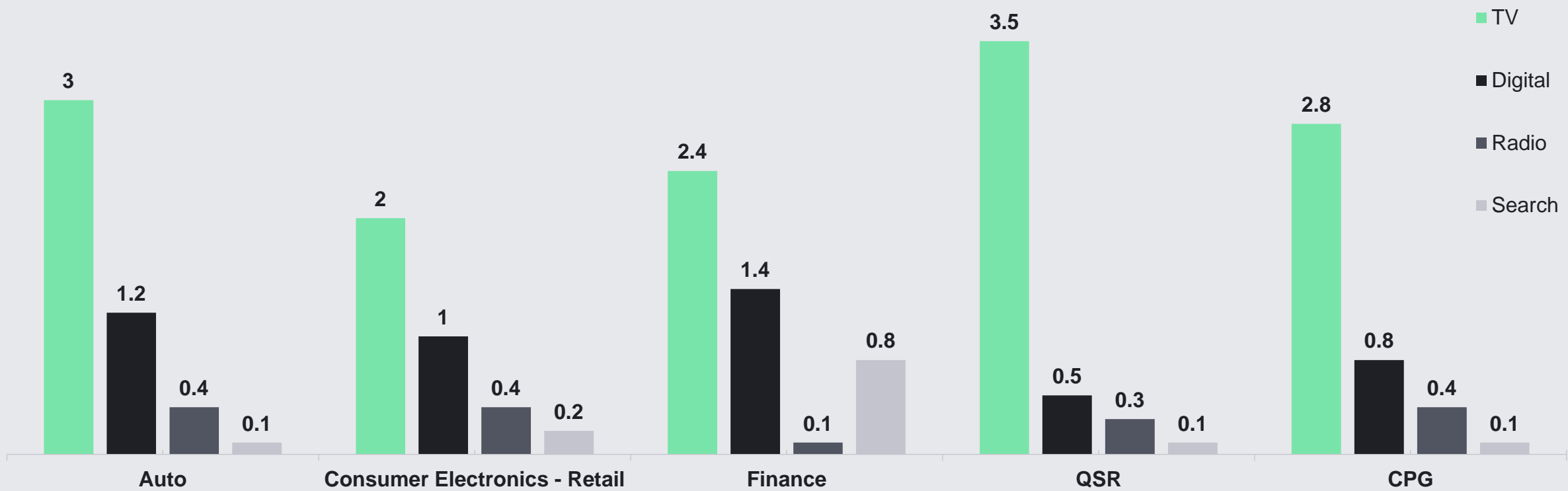
TV ads are the best for brand recall

% of viewers able to identify half or more advertisers after viewing content



TV is the most efficient medium to drive sales

Relative lift factor on outcomes

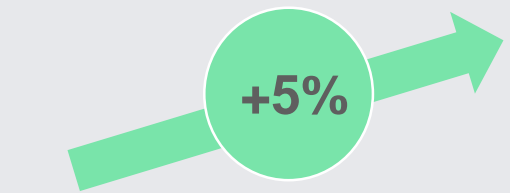


TV is the most efficient medium to drive sales

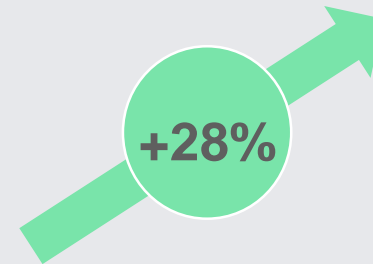
63% of TV campaigns have an immediate impact on the product inventory of the advertised brand

+22% lift factor on average on short-term sales

Purchases from the product inventory of the advertised brand



Unexposed households

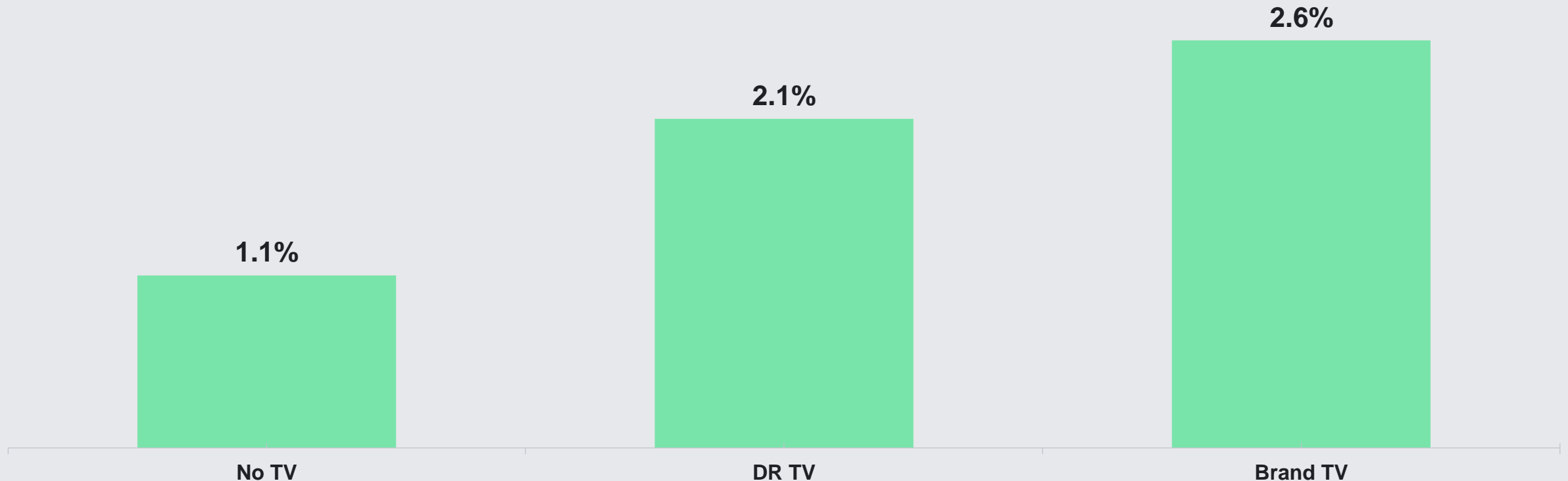


Exposed households

TV is the best media for market share growth

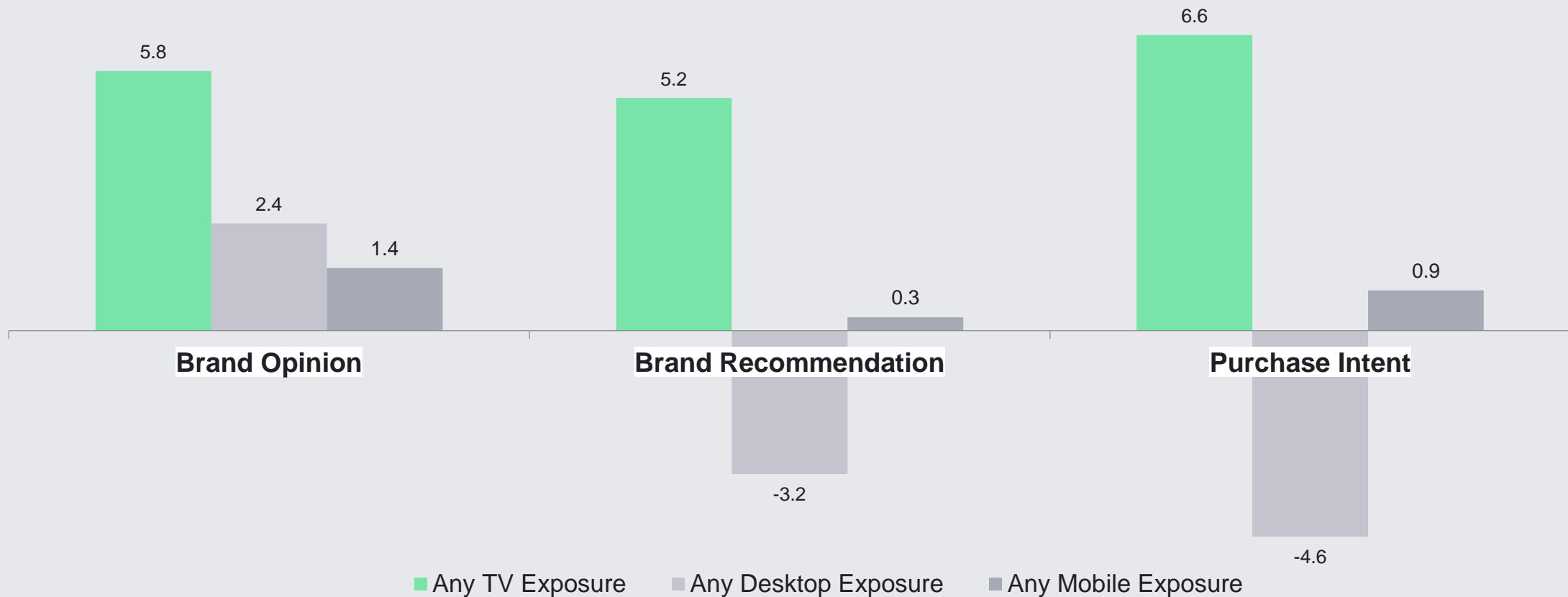
UK data shows TV as a strong media for market share growth.

Average market share points gained per annum



TV drives brand opinion and purchase intent

Impact by Media Channel – Any Exposure



TV ads are most effective for driving sales

99% of the sales models showed that TV had a positive impact on driving traffic the websites and stores.

TV	Online	Newspapers	SEM	Radio	Magazines	OOH	Cinema
99%	89%	81%	75%	58%	56%	35%	0%

TV drives traffic to the web

- TV ads boost brands' organic traffic*
- The organic traffic of an advertiser's website during a TV campaign increases by 55%
- This increase is stronger for pure players

	All advertisers	Pure-players	Multichannel advertisers
Campaigns	100%	50%	50%
Average organic traffic increase in %	55%	43%	66%

TV drives traffic to the web

Gross TV & Online investment of Travel-related e-commerce businesses

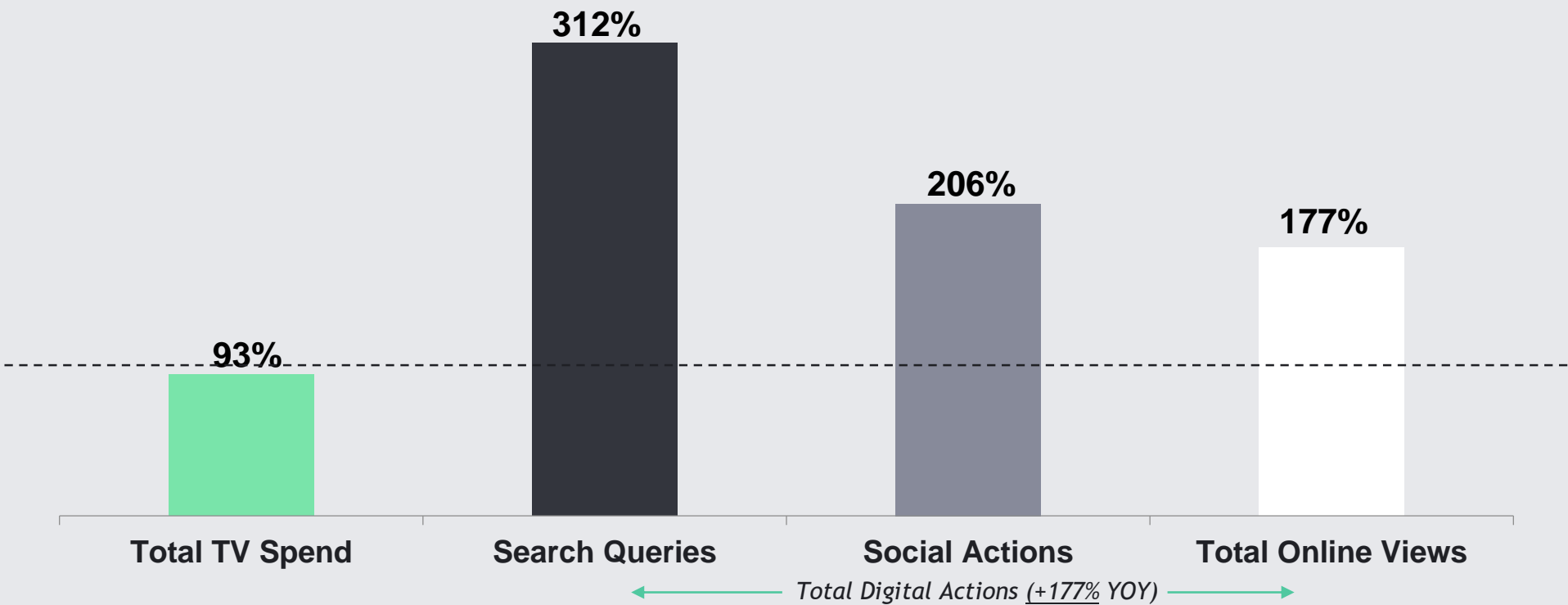


index with highest value = 100

TV drives traffic to the web

TV leads to increased searches, social actions and non-paid online video views of a brand's TV ad.

22 “Emerging” Direct-Disruptor Brands: TV Spend vs. “Digital Actions” YOY % Increase 2016 vs. 2017



Source: TV spending based on VAB analysis of Nielsen Ad Intel data, TV spend (national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV), CY 2016 & 2017. Digital actions based on VAB analysis of iSpot.tv data and reflects TV commercial-related searches (Google, Bing, Yahoo!), social actions (posts, likes, shares and comments related to TV ads on Facebook, Twitter, YouTube, iSpot.tv) and earned, not promoted, online video views of TV ads (YouTube, iSpot.tv). Digital actions are correlated to TV ad airing data.

Online brands see their online traffic strongly increase along with their TV adspend

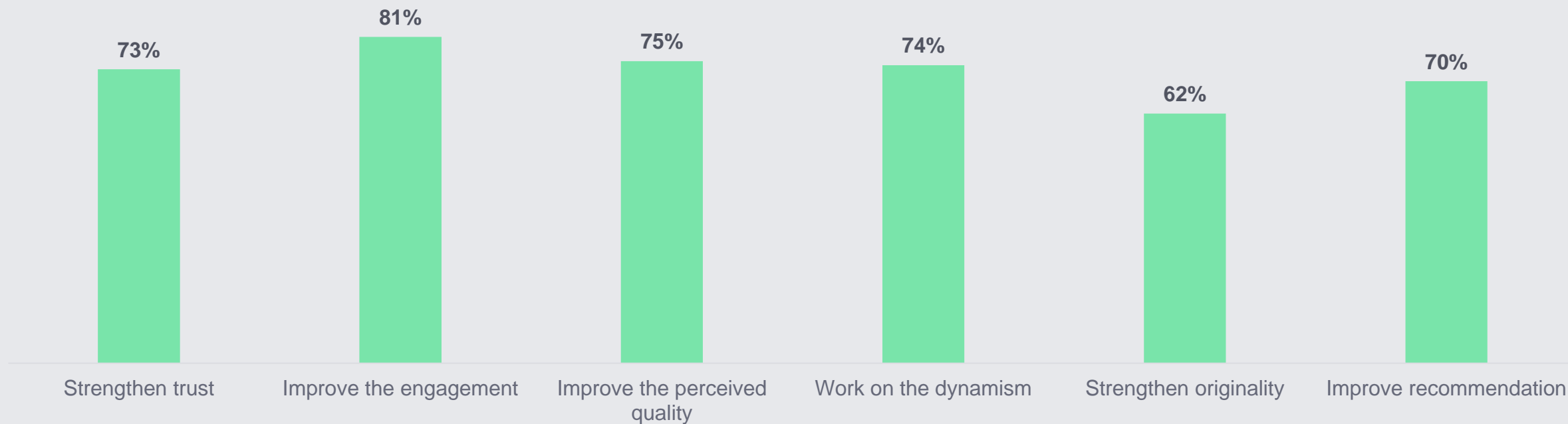
Monthly website unique visitors comparison (in thousands)

Company	Month prior to TV launch	Monthly average: TV launch-Jan 2018	% difference
Blink Health	261	449	+72%
Chewy	1,732	5,570	+222%
Eloquii	165	200	+21%
Flipp	2,133	6,835	+221%
Harry's	764	1,118	+46%
MVMT	192	912	+375%
Nerdwallet	4,269	12,005	+181%
Poshmark	5,865	10,680	+82%
Remitly	117	269	+130%
Saatva	184	343	+86%
Stitch Fix	1,151	2,241	+95%
Sun Basket	197	479	+143%
ThredUp	2,554	2,991	+17%
Top Hatter	1,891	4,317	+128%

Each of the featured emerging direct brands saw an immediate **significant lift** in website visits once their first TV campaign launched.

TV advertising positively impacts the advertiser's brand image

% of campaigns which had the following impact on the advertised brand



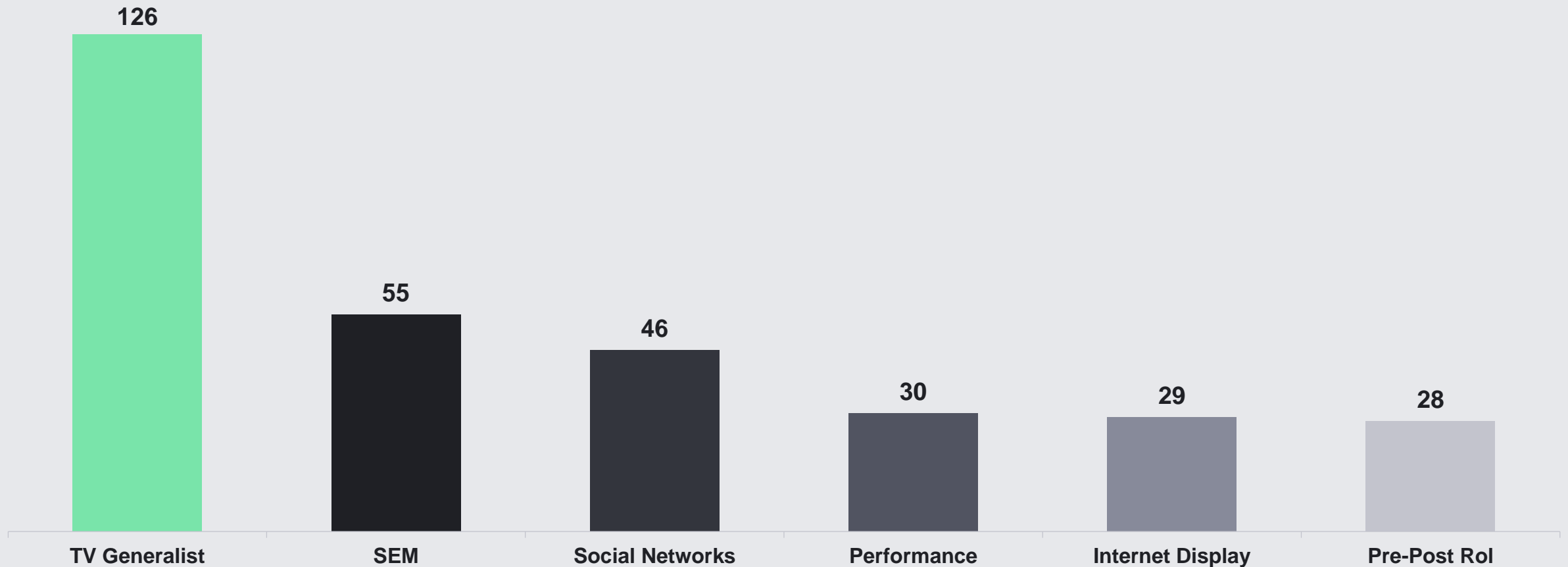
**TV is the greatest profit
generator**



TV generates
profit:
\$1 net invested in TV
pays back **\$1.70 by**
FMCG companies

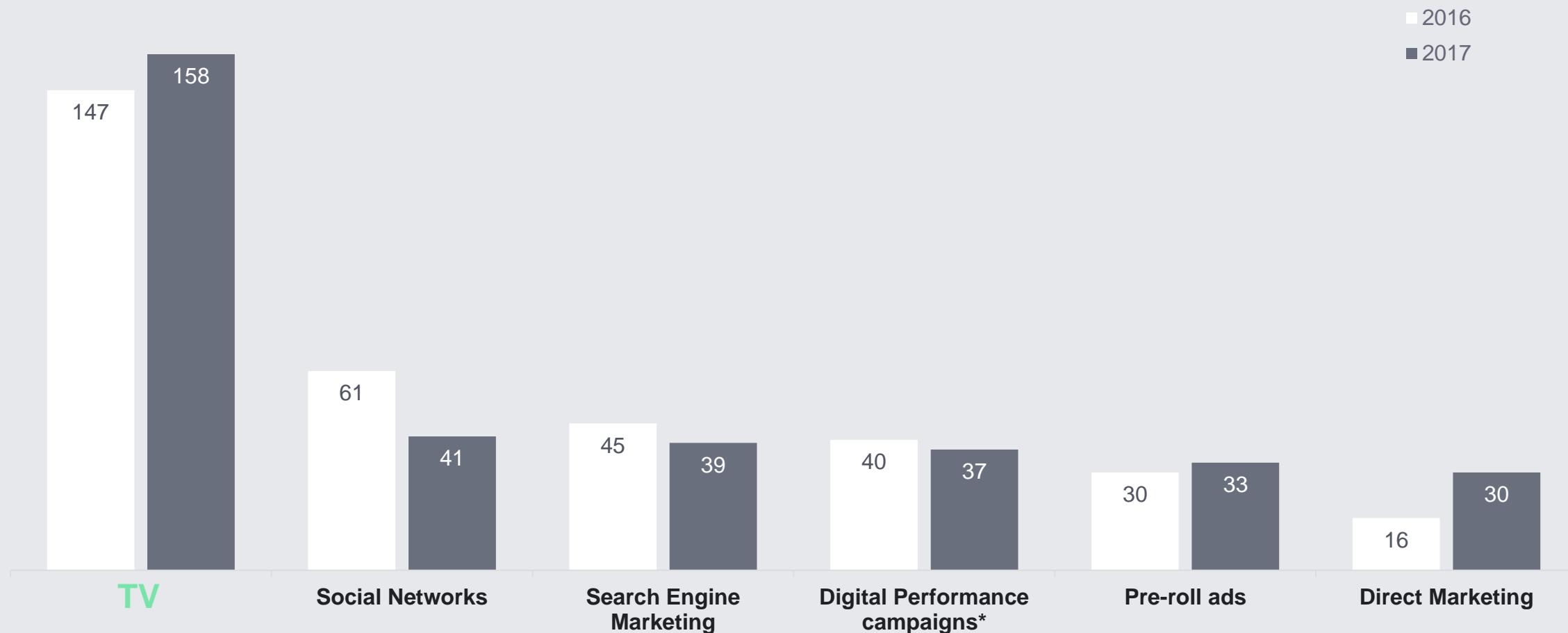


TV provides the best ROI for advertisers

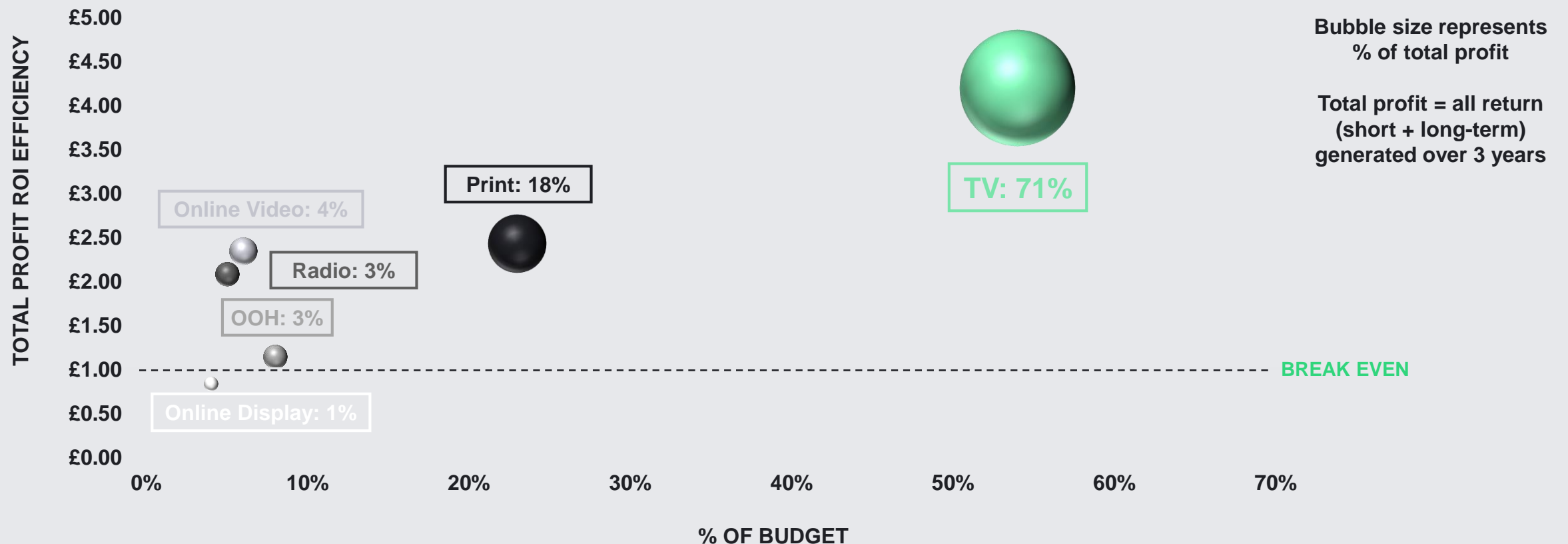


TV provides the best ROI for advertisers

Marketing Directors were asked the top 3 media in terms of ROI, giving 3 points to the biggest ROI provider, 2 to the second and 1 to the third.



Proportion of advertising-generated profit by medium



TV's unrivalled scalability

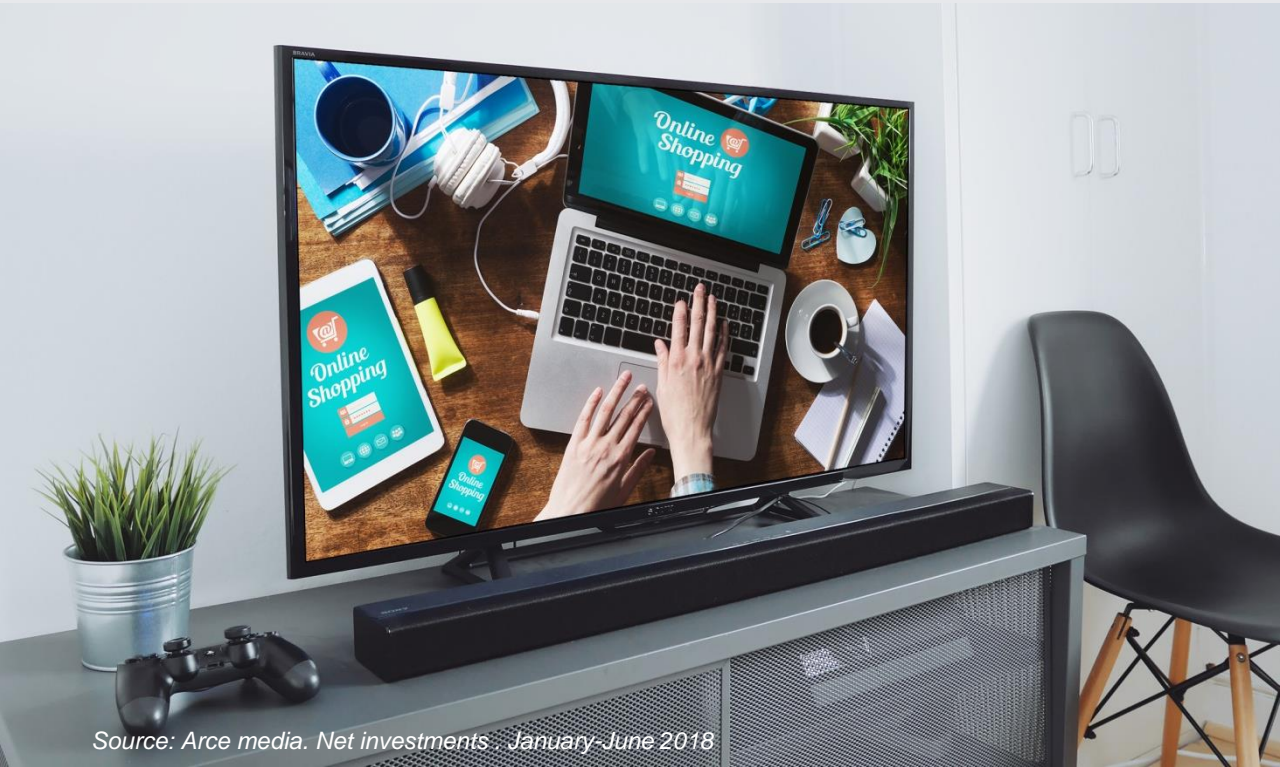


Online brands love TV



Online advertisers trust TV

Despite the myth that Pure Players and online advertisers spend the majority of their advertising budget on online platforms, figures for some of the major advertisers show that they invest massively on TV.



Source: Arce media. Net investments. January-June 2018

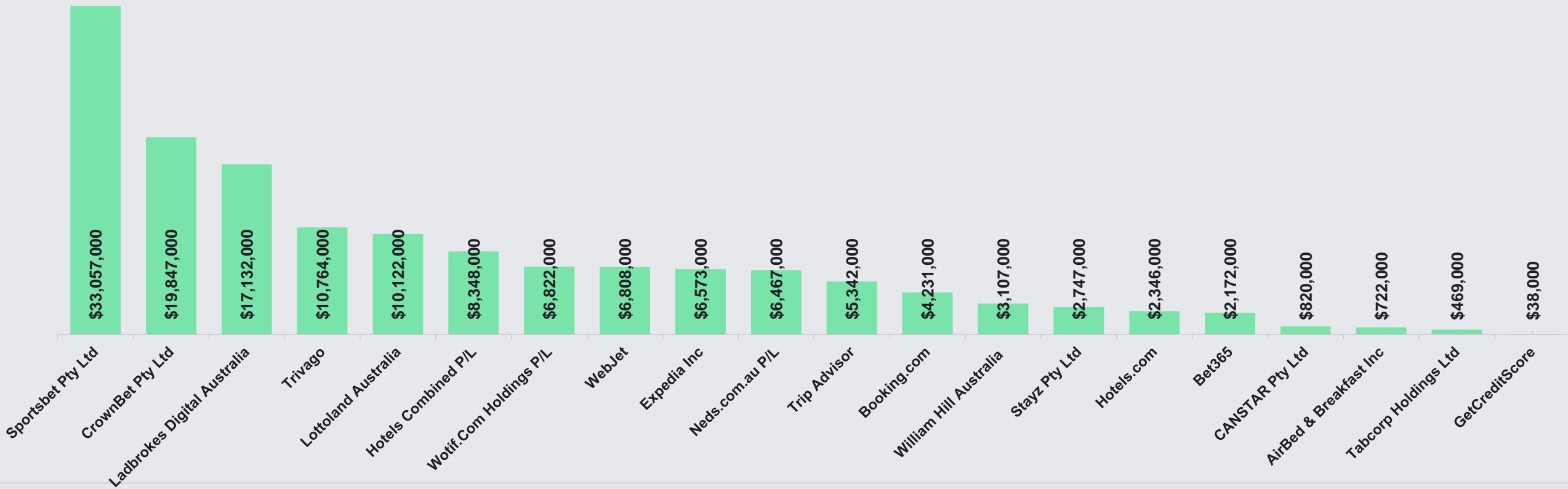
Advertising investment in %

- trivago®
- vivus.ES
- Rastreator.com
- amazon
- KAYAK
- hundredrooms
- mestic
- showroomprive.com

TV	Online
95,9%	4,1%
78,3%	6,9%
83,2%	0,3%
79,6%	15,3%
99,5%	0,5%
100,0%	0,0%
92,6%	0,1%
99,7%	0,3%

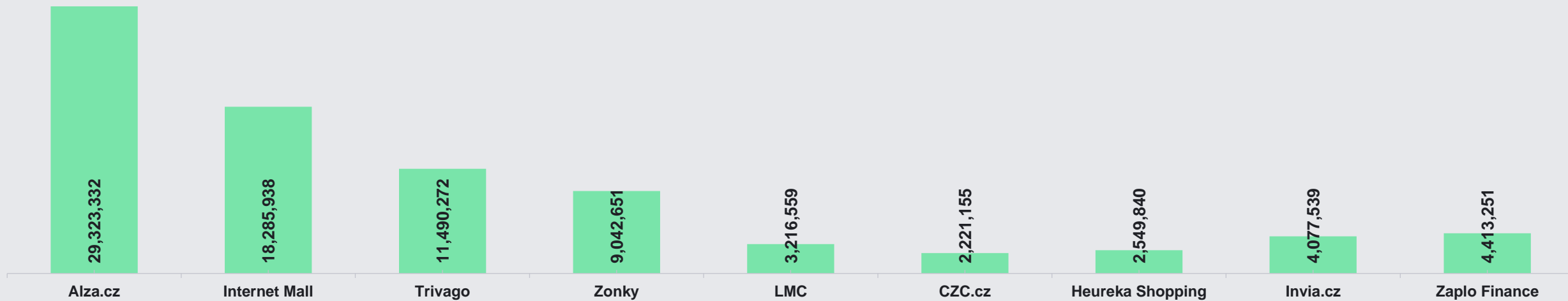
Online advertisers' TV investment has grown significantly

\$148 million is the amount invested in TV advertising by the top 20 online advertisers in 2017, compared to \$125 million in 2016.



Online advertisers' TV investment has grown significantly

€ 84,6M gross is the amount invested in TV advertising by the top 9 pure player advertisers in 2017, compared to €81.6M in 2016.



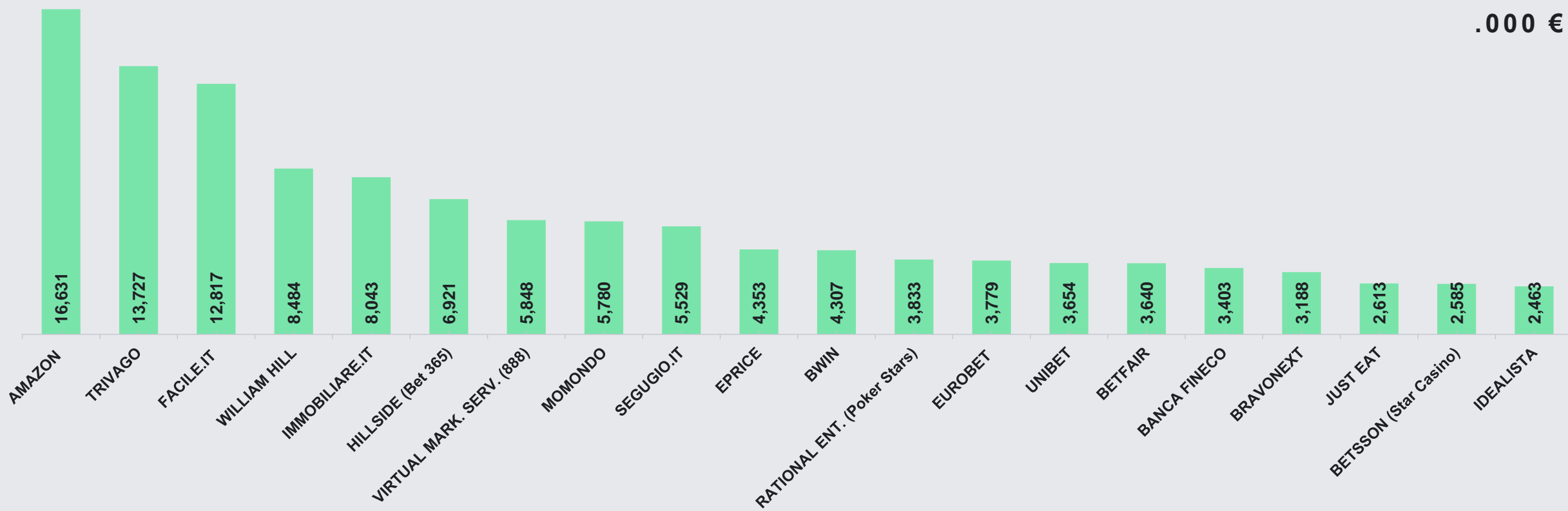
Online advertisers' TV investment has grown significantly

€ 545.1M gross is the amount invested in TV advertising by the top 20 pure player advertisers in 2017, compared to € 439.5M gross in 2016.



Online advertisers' TV investment has grown significantly

121,6M € net is the amount invested in TV advertising by the top 20 pure player advertisers in 2017, compared to 71,7M € in 2015.

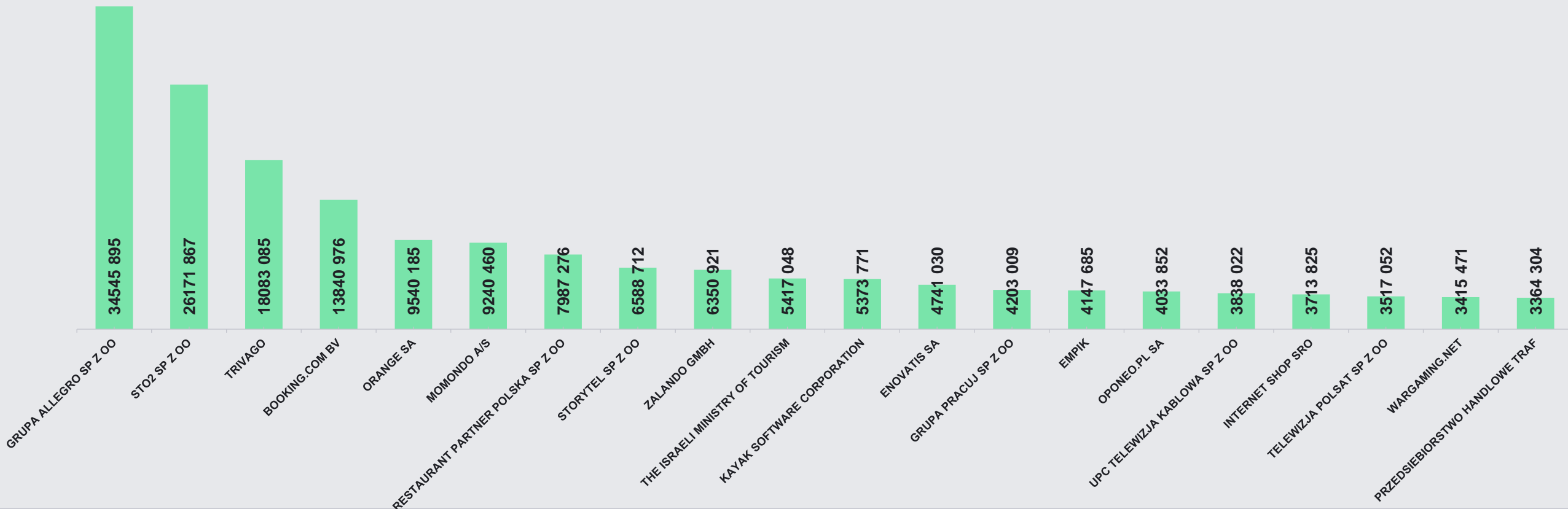


Online advertisers' TV investment has grown significantly



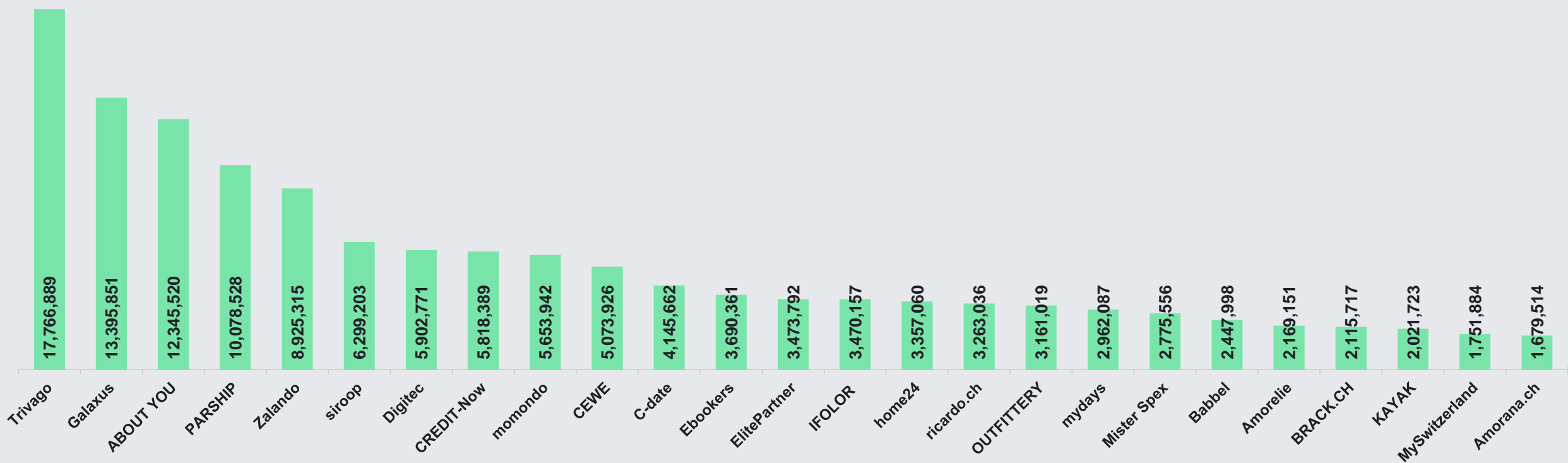
Online advertisers' TV investment has grown significantly

€ 178M gross is the amount invested in TV advertising by the top 20 pure player advertisers in 2017, compared to € 73M in 2013.

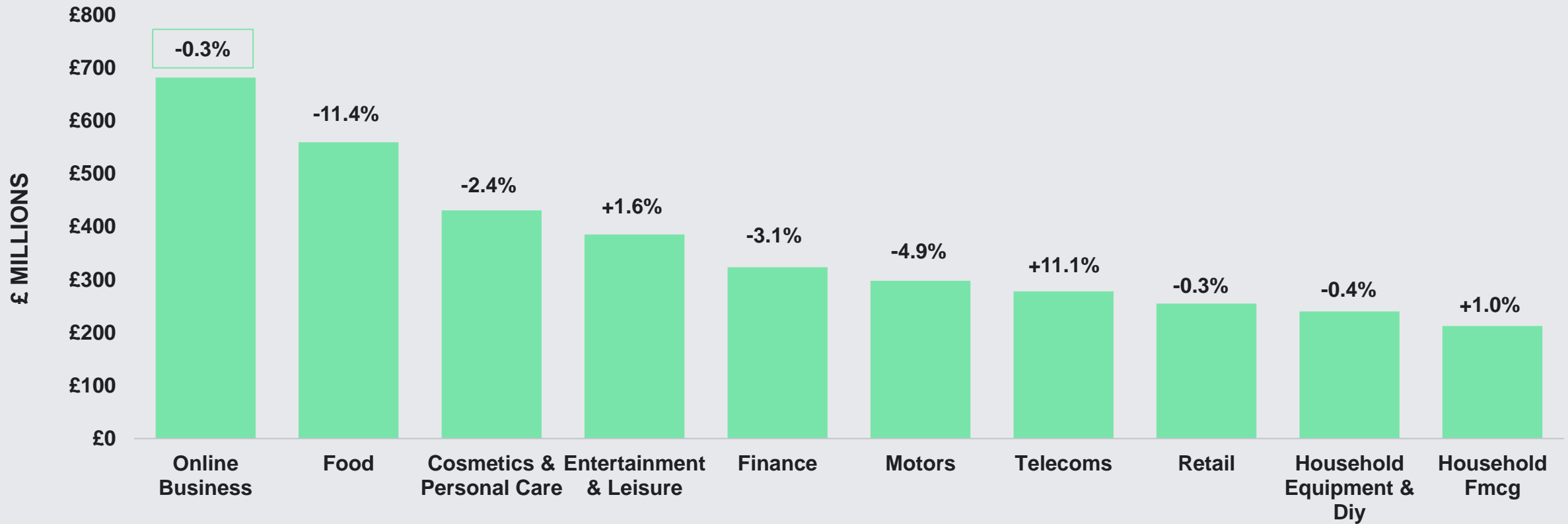


Online advertisers' TV investment has grown significantly

2017: +40% more spendings by the top 25 pure player advertisers in TV than 2014 (€ 112 M vs. 84 M)

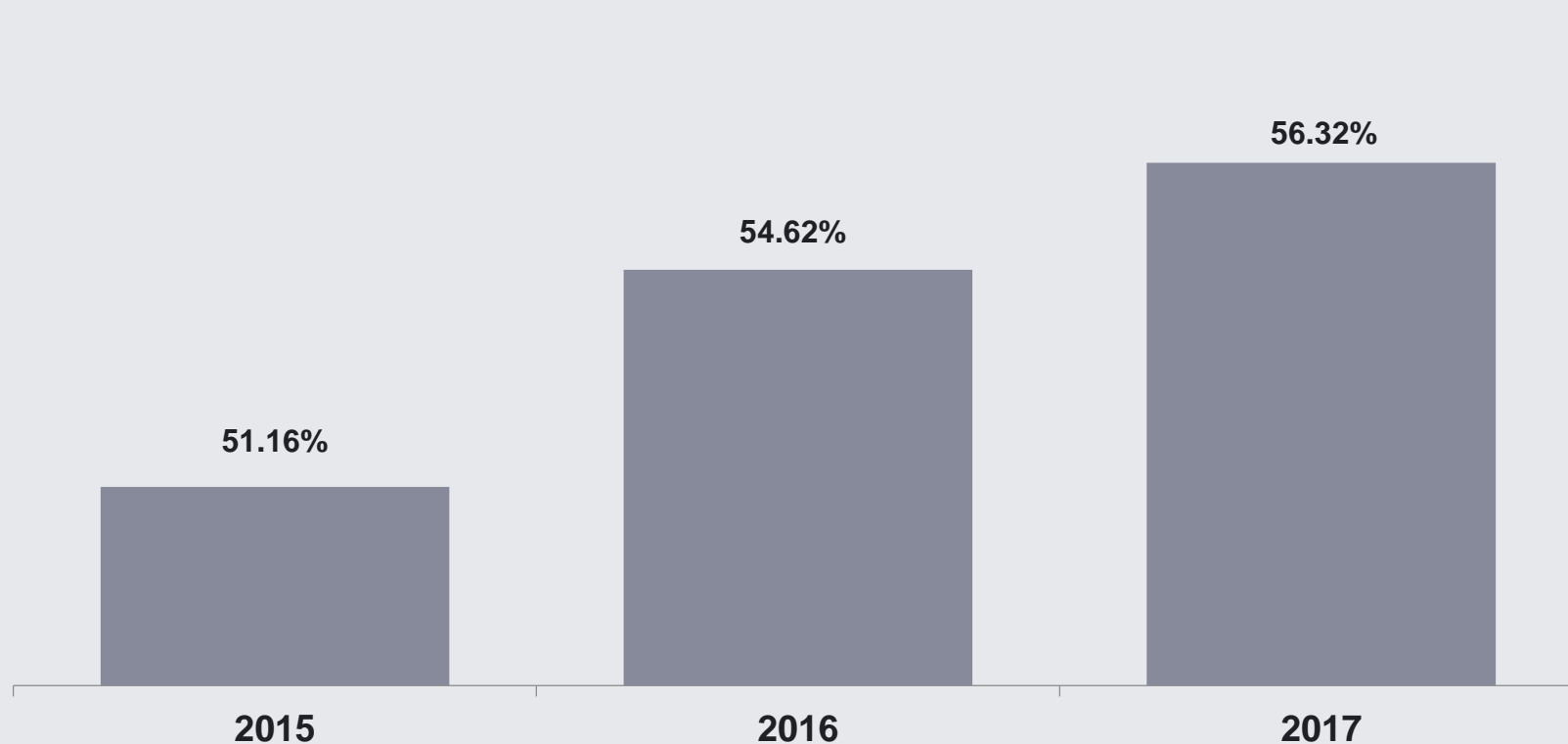


Online businesses are the biggest investors in TV



Online advertisers' TV investment has grown over the years

The share of TV within the total media adspend of online players has been increasing constantly.



Sample of the top online advertisers

sportsbet
.com.au

CrownBet



Ladbrokes

trivago®

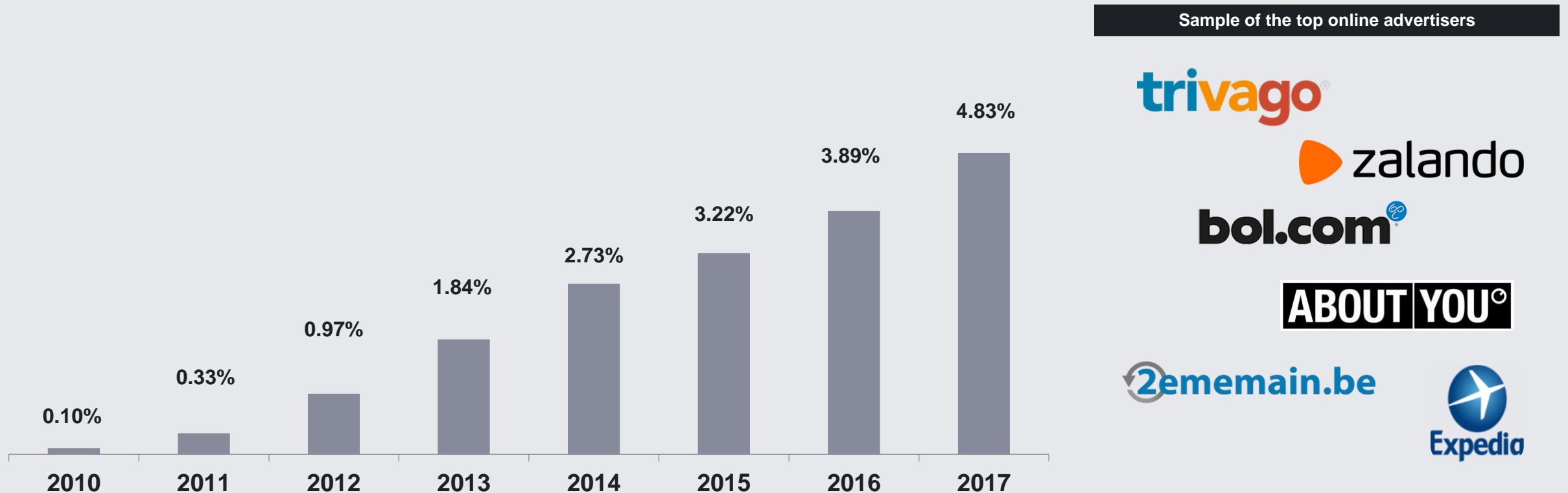
Online advertisers' TV investment has grown significantly

The total TV adspend of the top 20 e-commerce players of 2017 almost trippled from €67M in 2013 to € 172M in 2017.



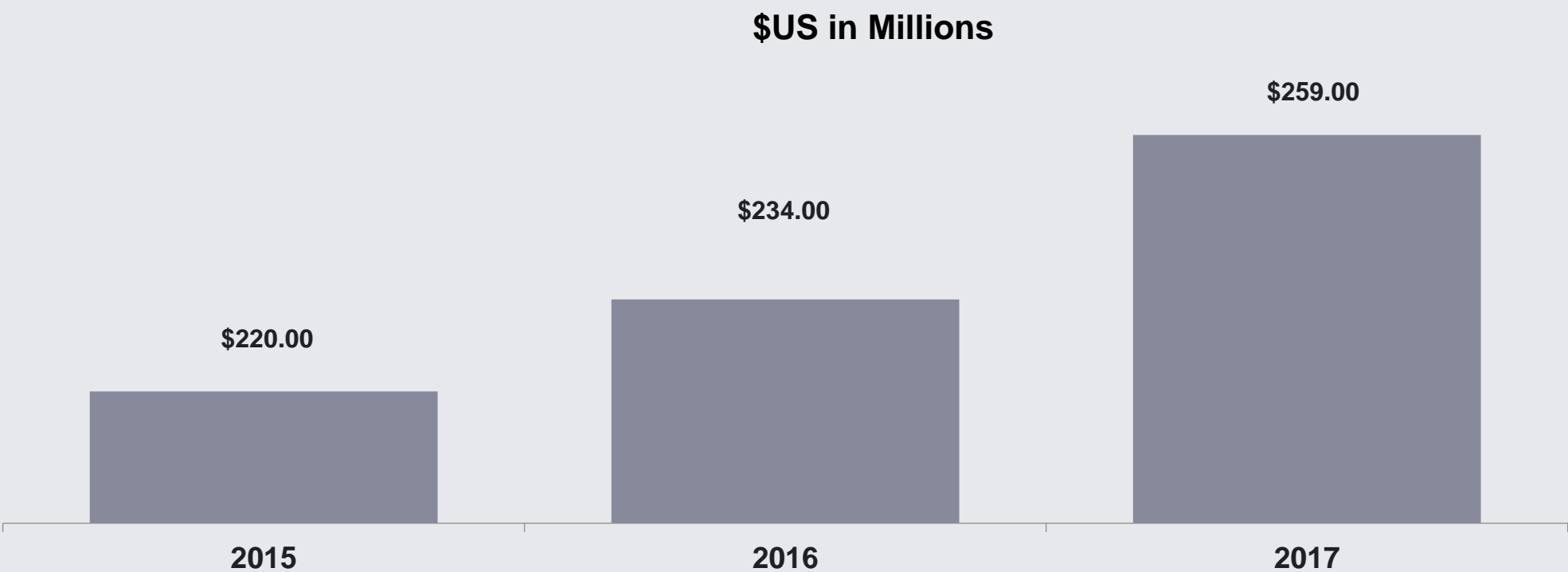
Online advertisers' TV investment has grown significantly

The share of TV within the total media adspend of online players has been increasing constantly since 2010.



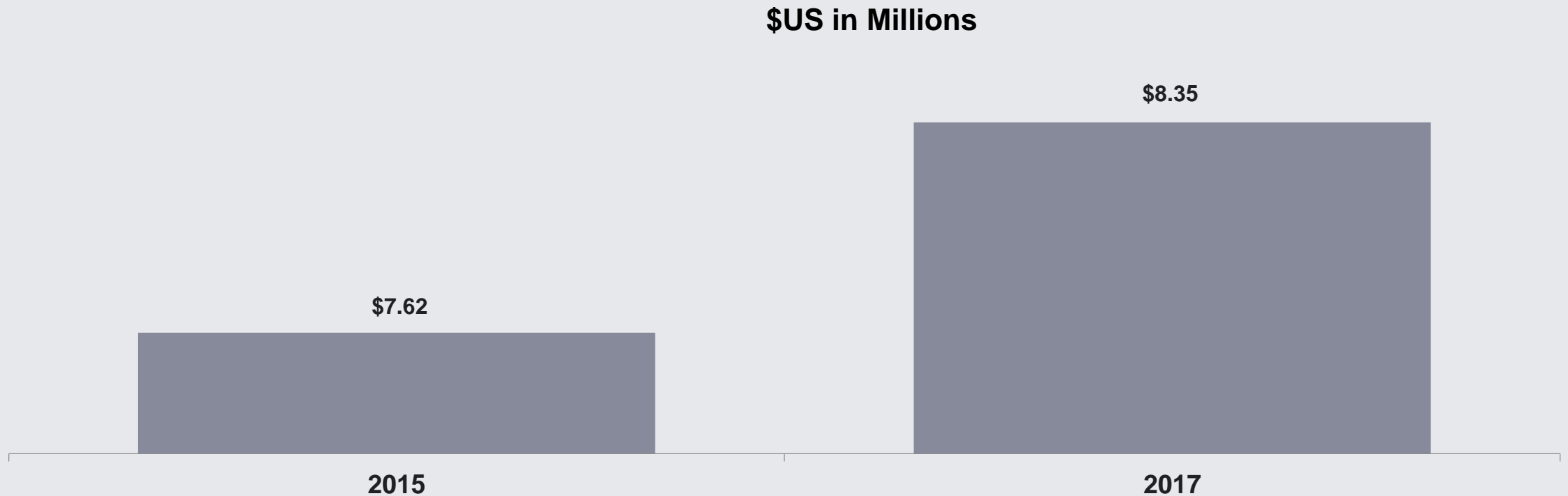
Online advertisers' TV investment has grown over the years

The total TV adspend of online services advertisers doubled from \$220M in 2015 to \$259M in 2017.



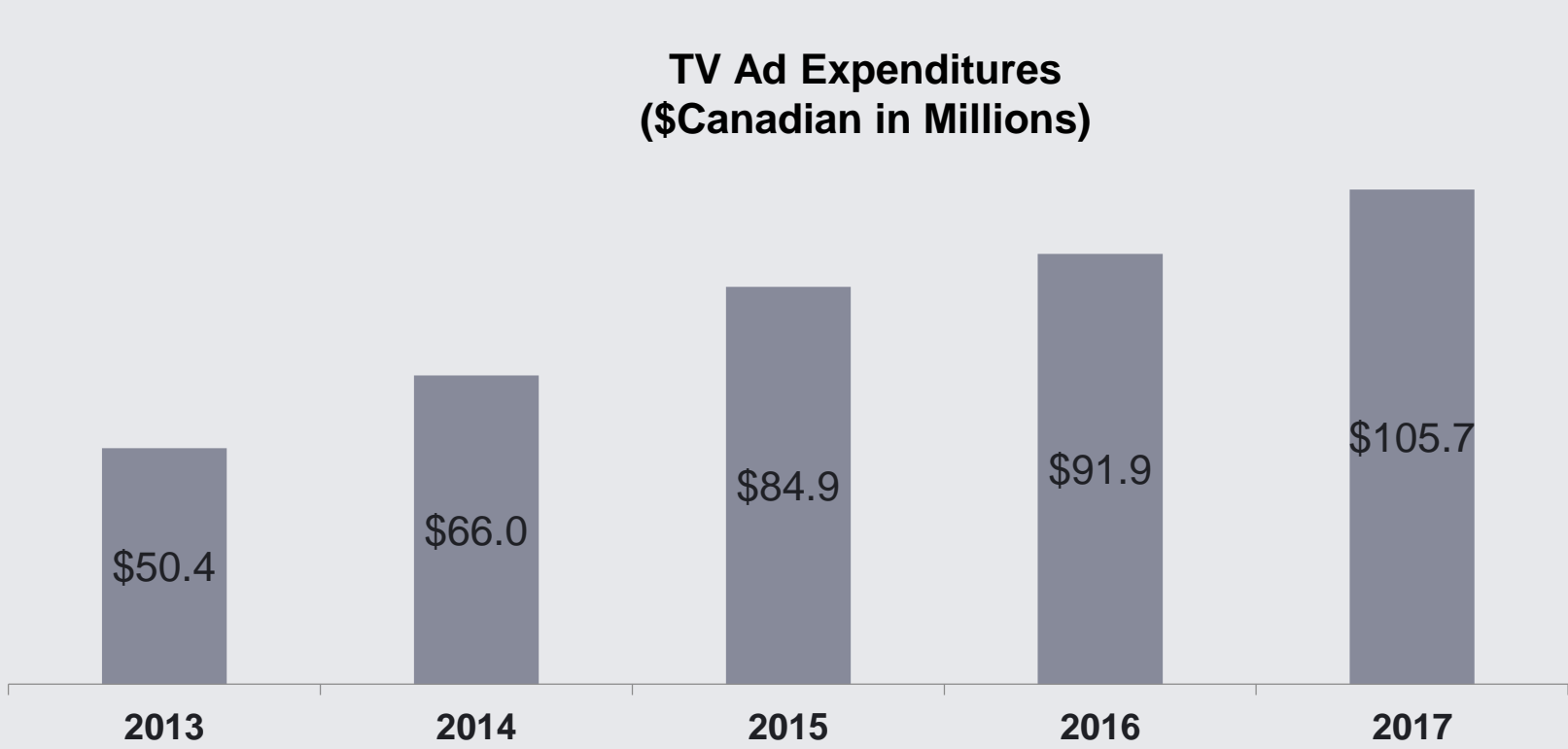
Online advertisers' TV investment has grown over the years

The total TV adspend of online services advertisers doubled from \$7M in 2015 to \$8M in 2017.



Online advertisers' TV investment has grown significantly

Spending in TV of online players has more than doubled over the past 5 years

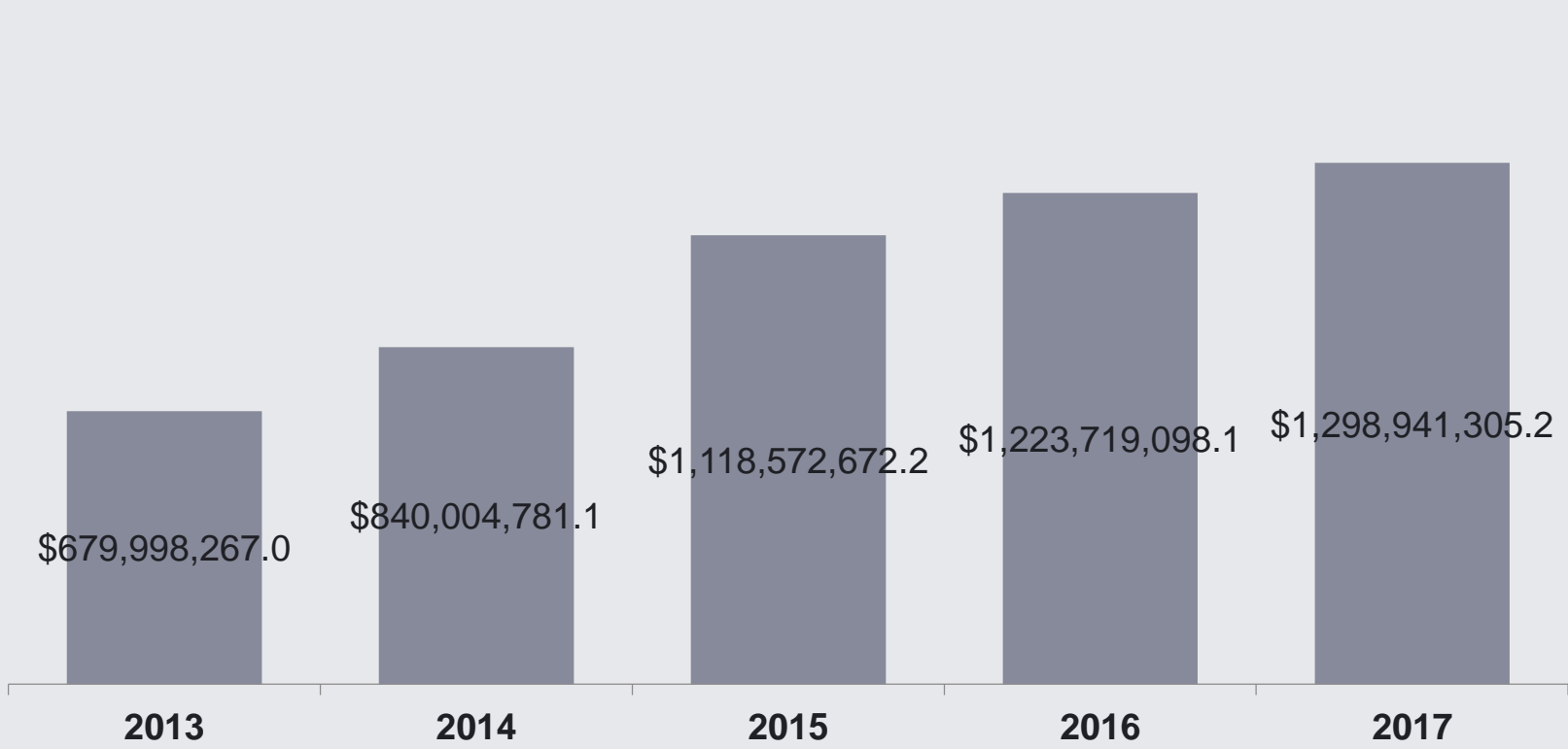


Sample of the top e-commerce advertisers



Online services advertisers' TV investment has grown significantly

The total TV adspend of online services advertisers doubled from €680M in 2013 to € 1.3MM in 2017.



Sample of the top online services advertisers



Online advertisers' TV investment has grown significantly

The total TV adspend of e-commerce players doubled from €97M in 2011 to € 298M in 2017.



Online Brands spend billions on TV

Online brands are spending € 142M more on TV annually than four years ago, which represents a 159% increase.

■ Online Brands' global investment



Sample of the top e-commerce advertisers

Booking.com

trivago

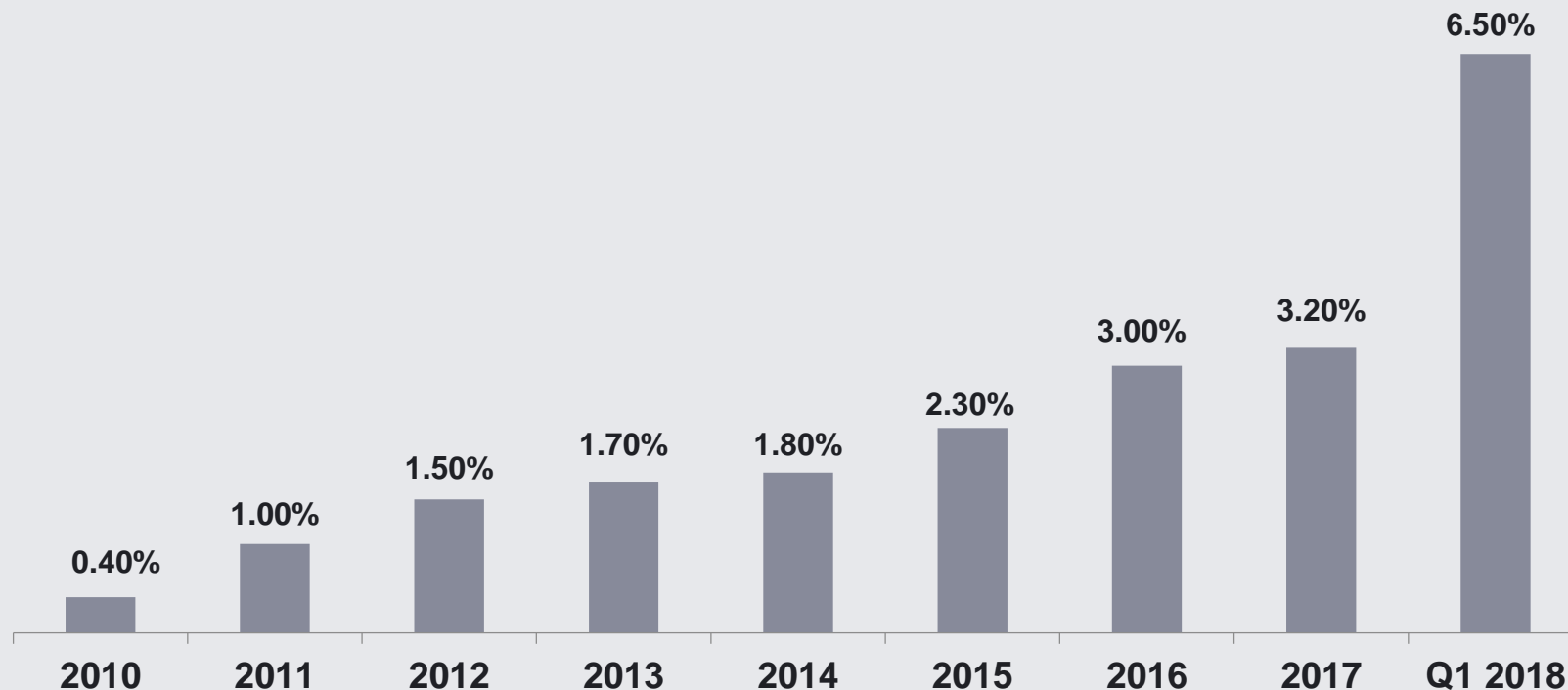
zalando

WARGAMING.NET
LET'S BATTLE

momondo

Online advertisers' TV investment has grown significantly

The share of TV within the total media adspend of online players has been increasing constantly since 2010.

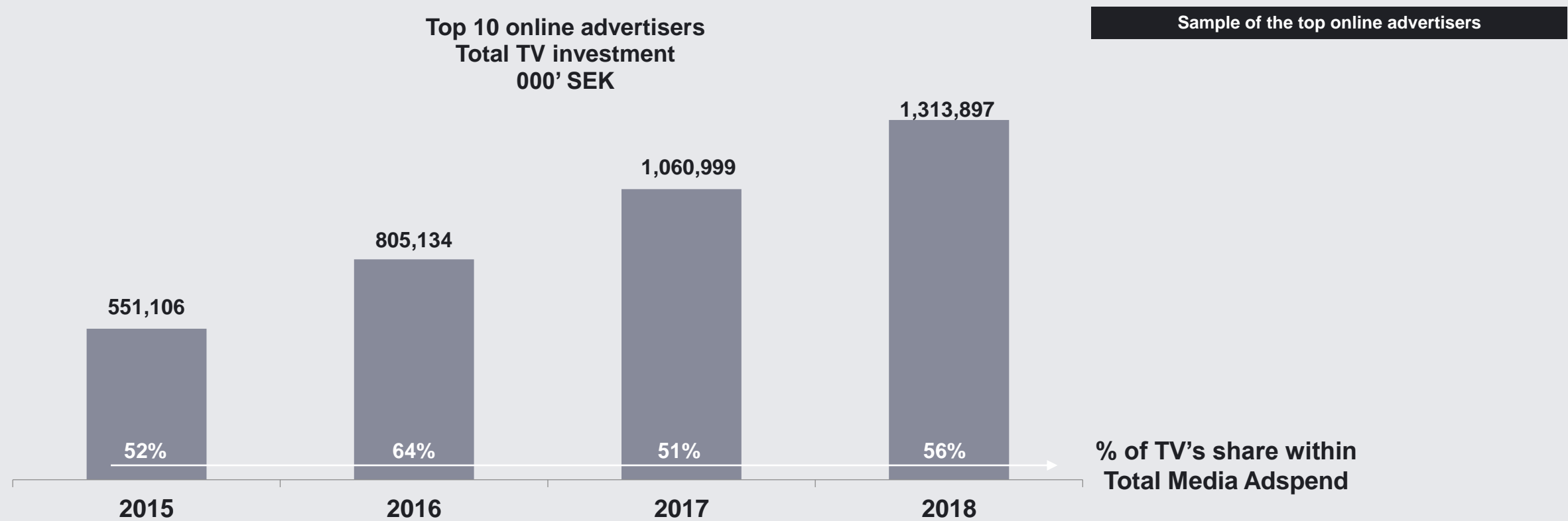


Sample of the top online advertisers



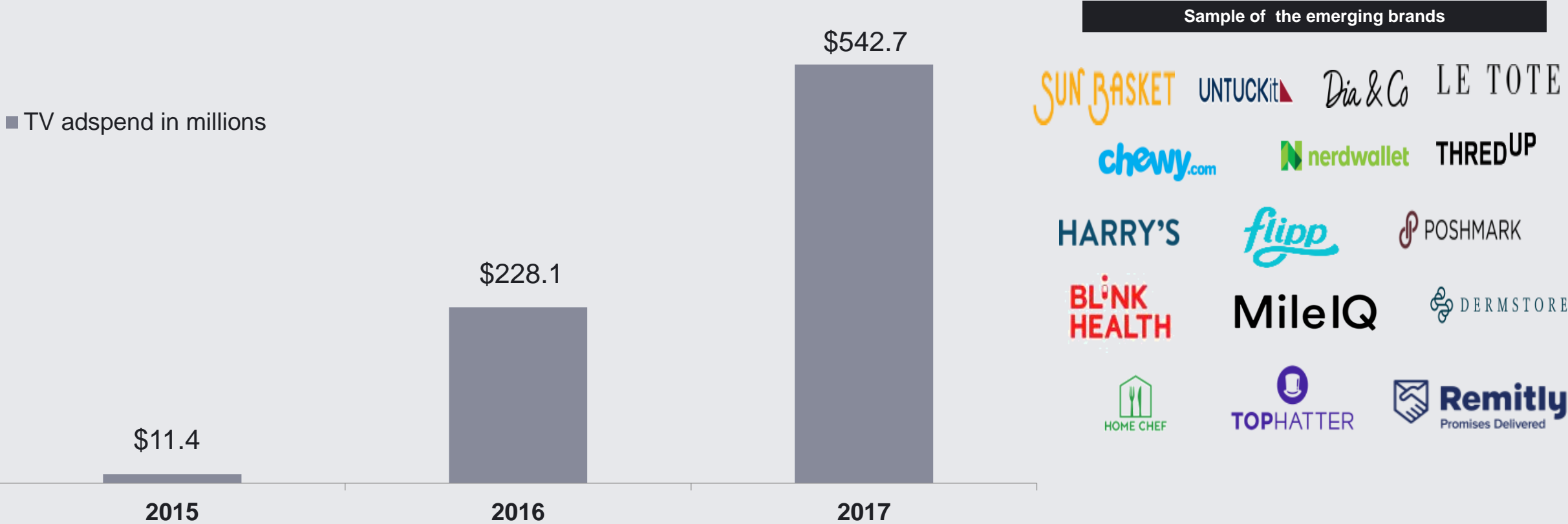
Online advertisers' TV investment has grown significantly

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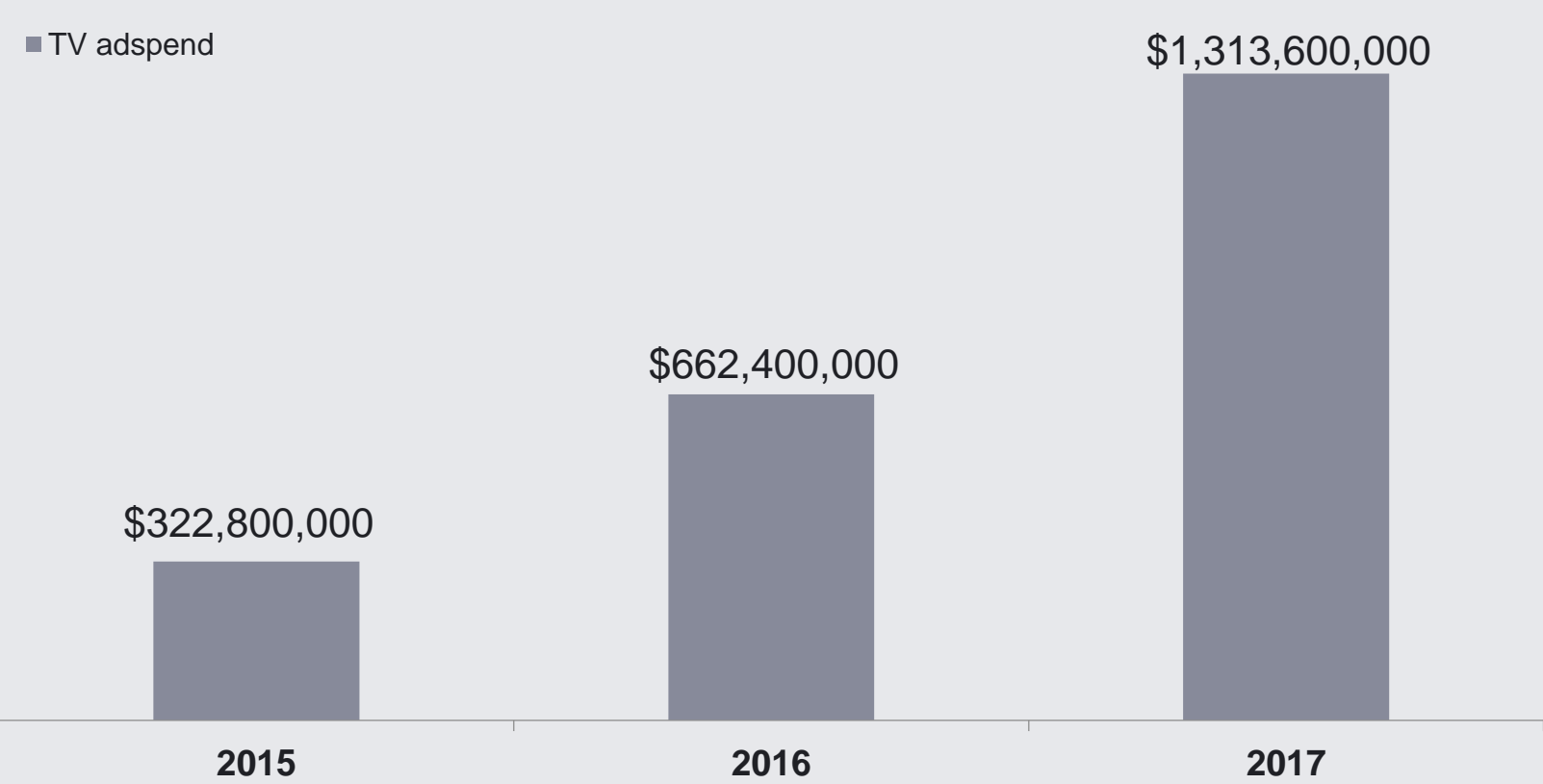
Emerging direct-disruptor brands collectively spend millions on TV

“Emerging” direct-disruptor brands have accelerated spending recently in this very competitive environment, having invested over \$300MM more in TV over the last year



Top direct-disruptor brands collectively spend billions on TV

50 Direct-Disruptor Brands Collectively Spent Over \$1.3 Billion On TV In 2017; A 98% Increase YOY



Sample of the 50 direct-disruptor brands





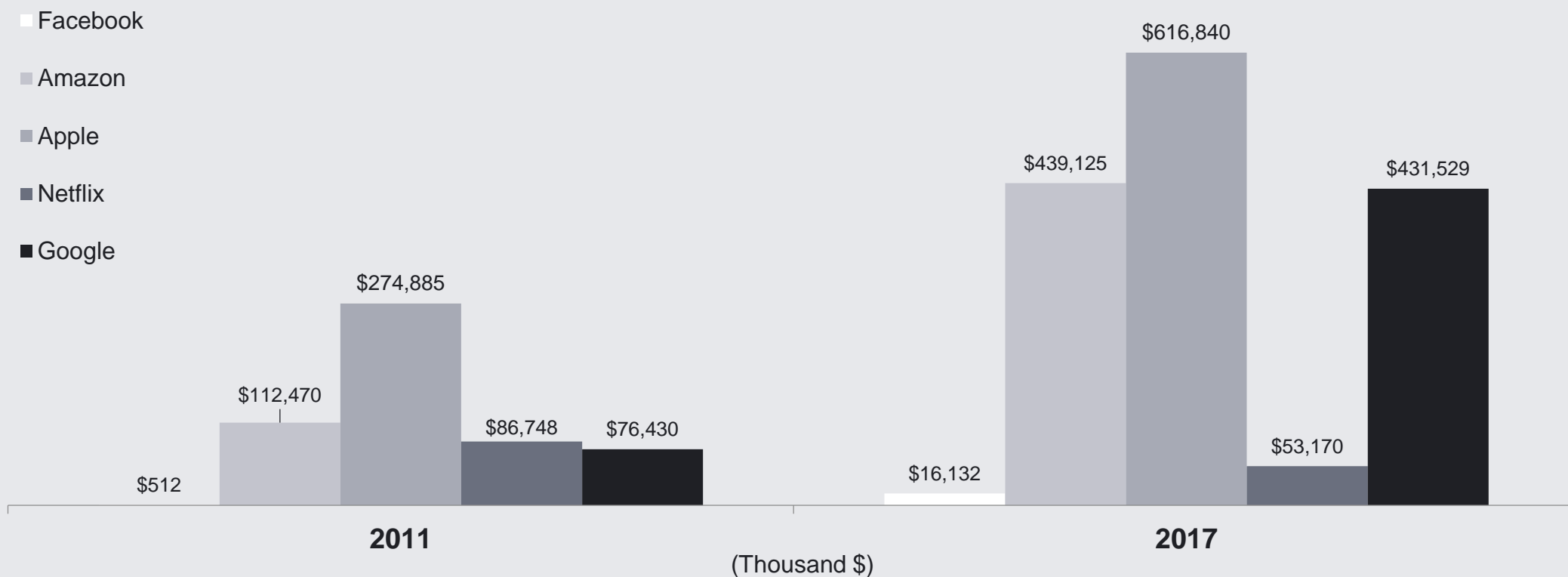






The “FAANG” brands have nearly tripled their TV ad spend in 6 years

Within six years, the five major established digital brands have collectively increased their annual TV spend by more than US\$1 billion



Complementarity

TV makes all other media more effective



"I think there is a pressure on CMOs to invest in digital because ultimately it is very trackable so it inspires CFO's confidence.(...) but ultimately we are trying to grow and get more customers to consider flying with us and **TV is key to that.**"

Clare Cronin, CMO, Virgin Atlantic

September 2018

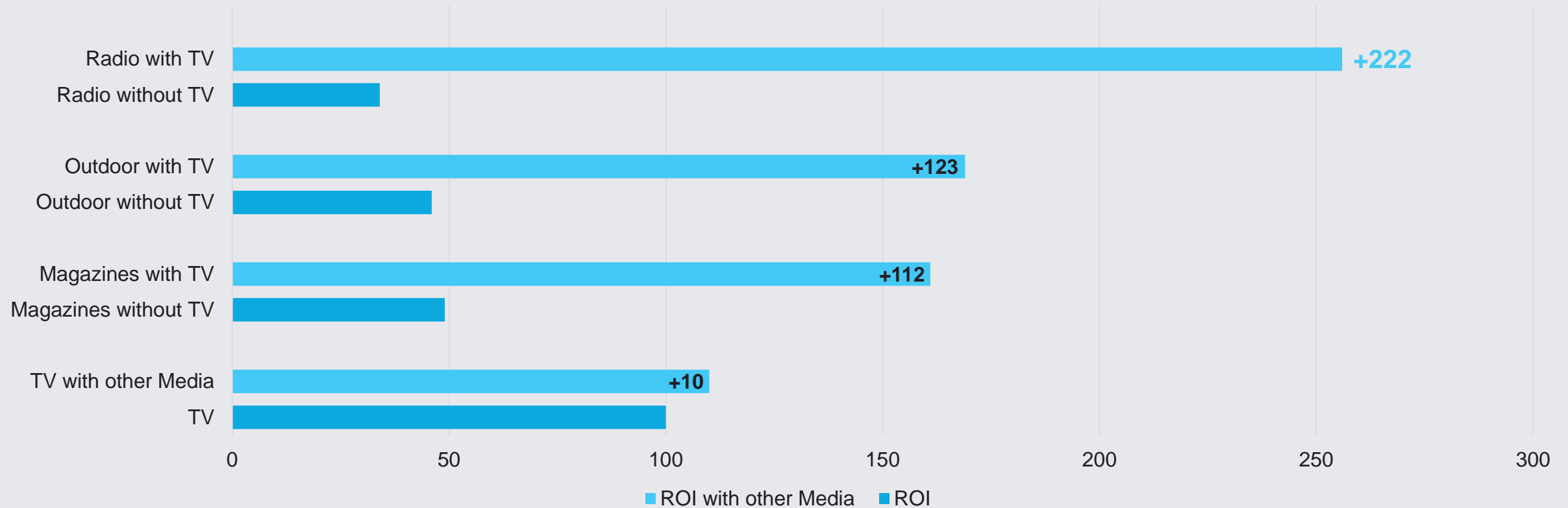
TV boosts other media

93% of sales models showed that TV had a positive impact on website traffic (TV was only surpassed by online and SEM).

TV	Online	SEM	Social	Newspapers	Radio	Magazines	Outdoor	Cinema
93%	100%	98%	88%	75%	73%	69%	50%	0%

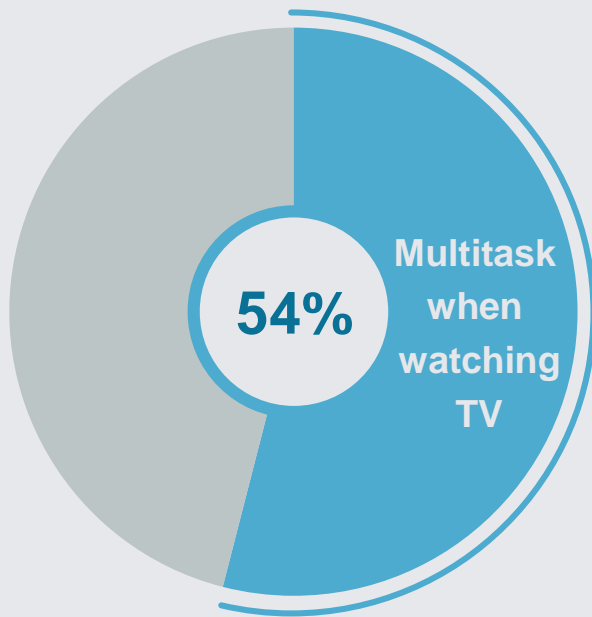
TV boosts other media

Average ROI per Medium, Mono- versus Mix with TV, Index*

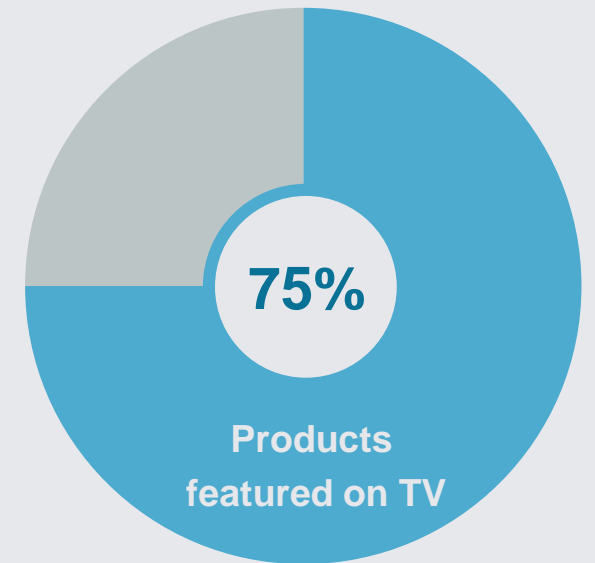
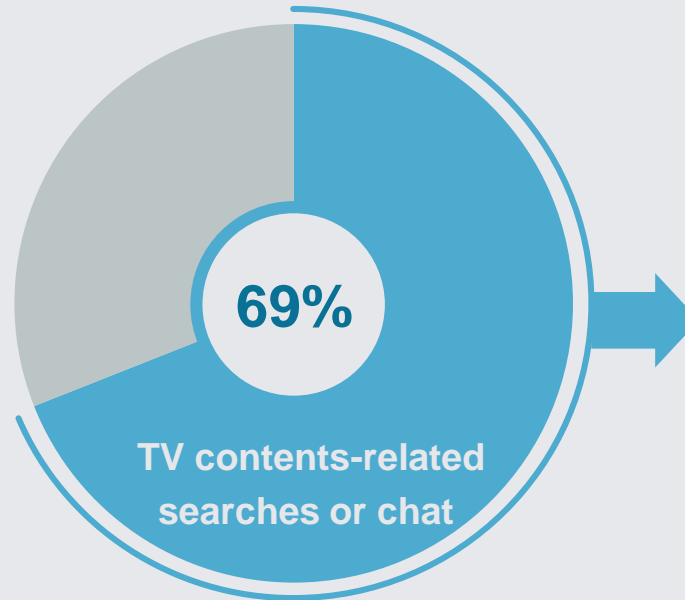


Multiplatform TV's halo impacts advertisers' ROI

% of multitasking audience

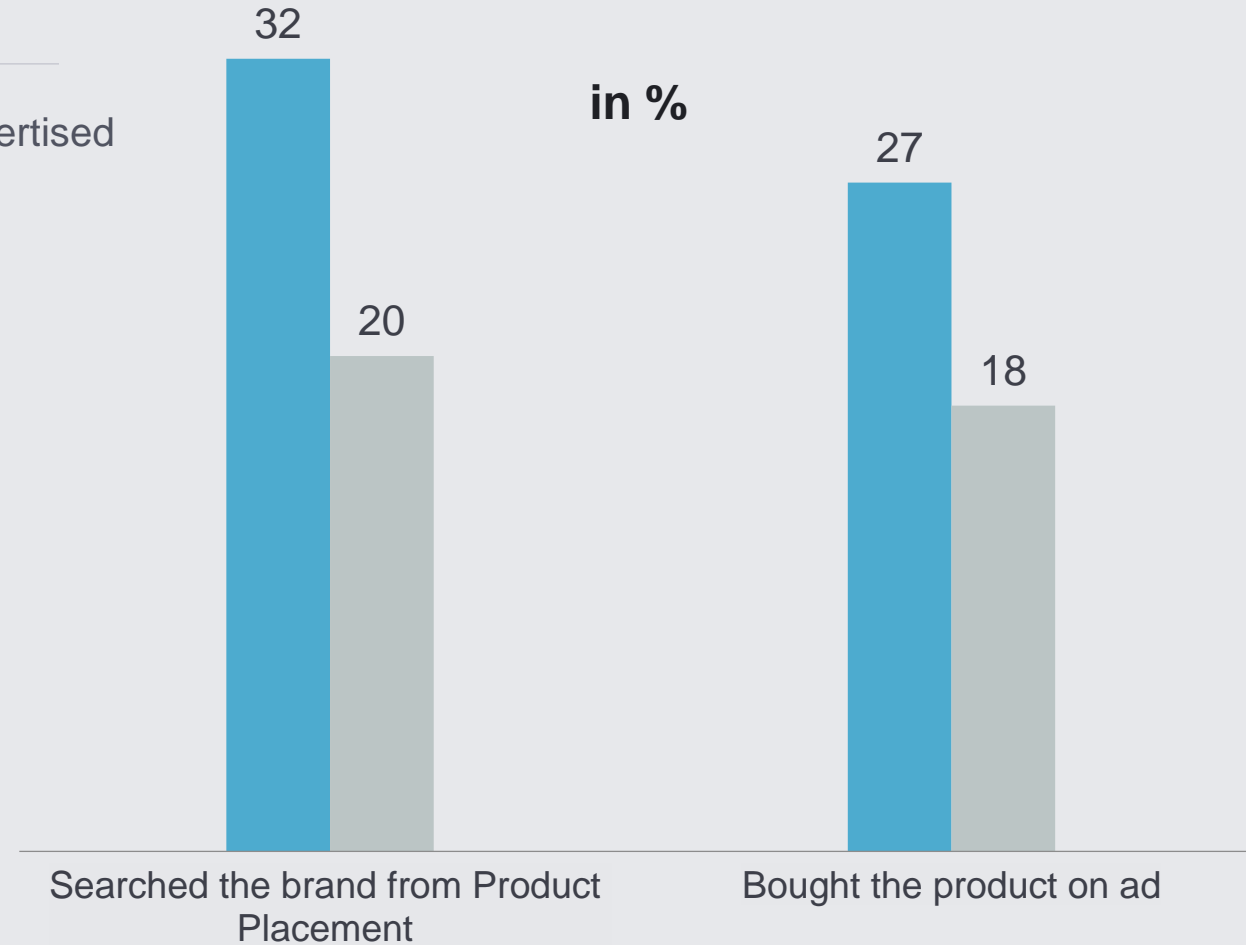
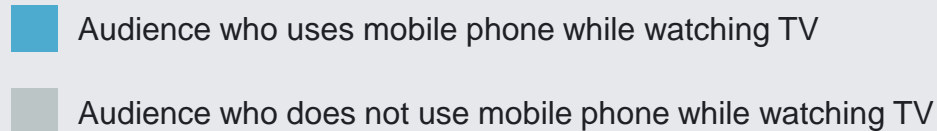


Activities of multitask audiences



For multitasking audiences, Product Placement directly affect the sales

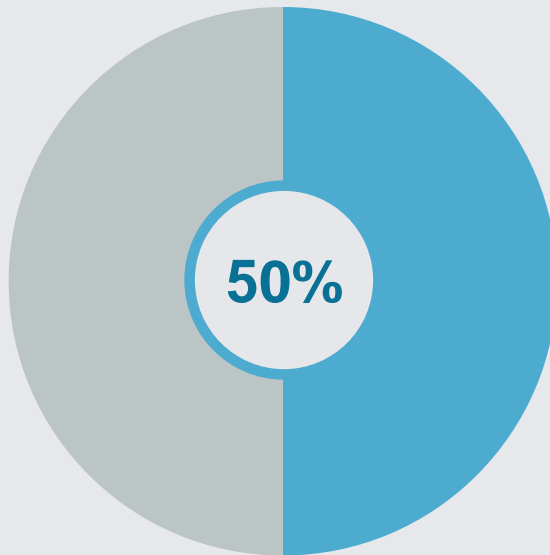
32% of multitask audience have experience searching the PPL-advertised products while only 20% of non-multitask audience did.



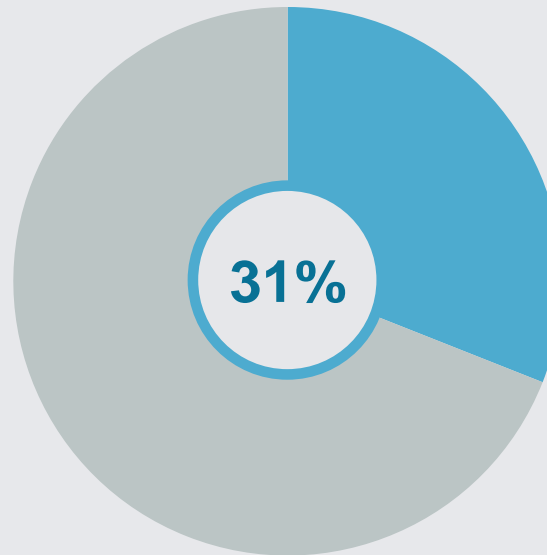
TV ads lead to mobile app download

Attitude of multitasking TV audience towards mobile app ads

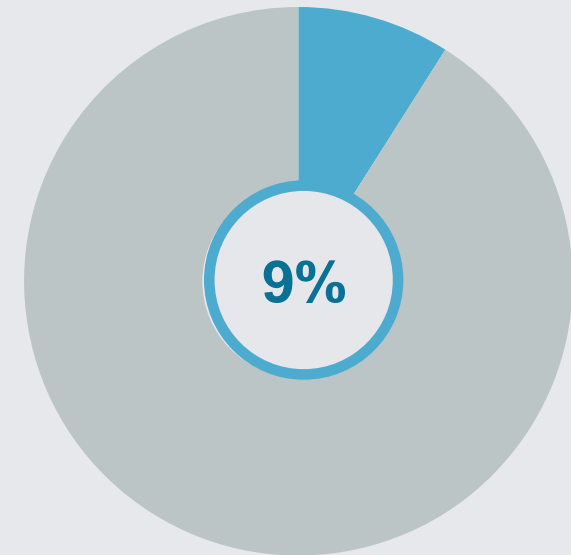
"I got interested in the app"



"I downloaded the app"



"I payed for the app"



Multi-screening brings the high-street to the living room



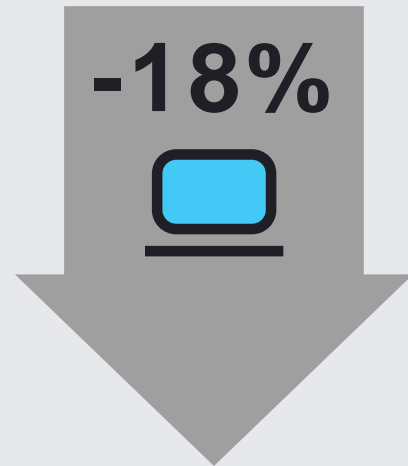
41 minutes

spent using internet
while watching TV per
day

Multiplatform TV's halo impacts Digital ROI

Multiplatform TV's halo drives a portion of short-term ROI usually attributed to Digital advertising, which also undervalues ROI attributed to Multiplatform

Note: Digital includes Paid Search, Display, and Short-Form Video advertising

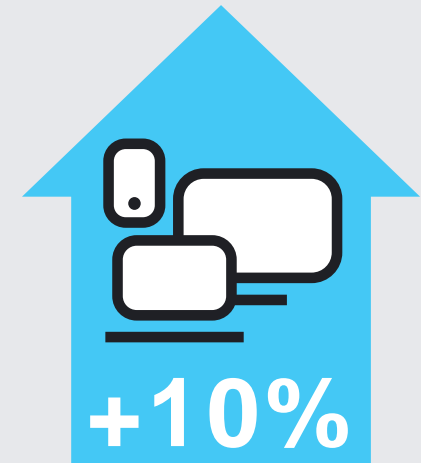


Standalone Digital ROI

Without Multiplatform TV's halo, Digital's average ROI would decline

Multiplatform TV's Halo On Digital Advertising

Impact of Multiplatform TV advertising on Digital within integrated advertising campaigns



Multiplatform TV's Adjusted ROI

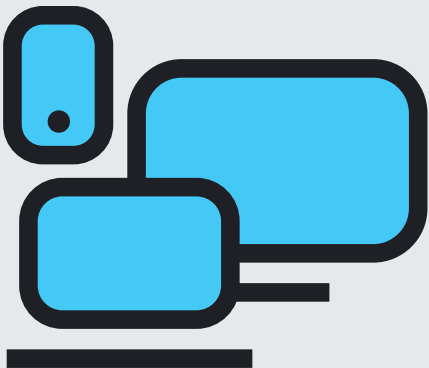
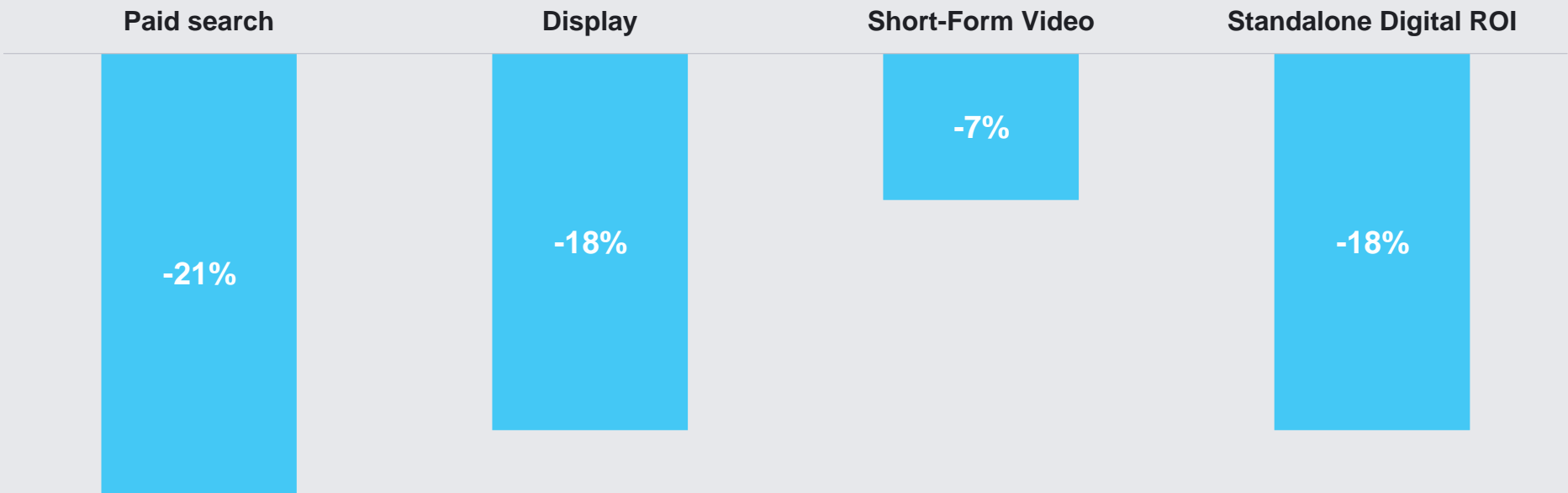
Due to Multiplatform TV's halo, Multiplatform TV's average ROI is understated

Multiplatform TV's halo impacts Digital ROI

If we consider the halo effect by type of digital channel, Multiplatform TV's halo effect is most significant for paid search and display advertising.

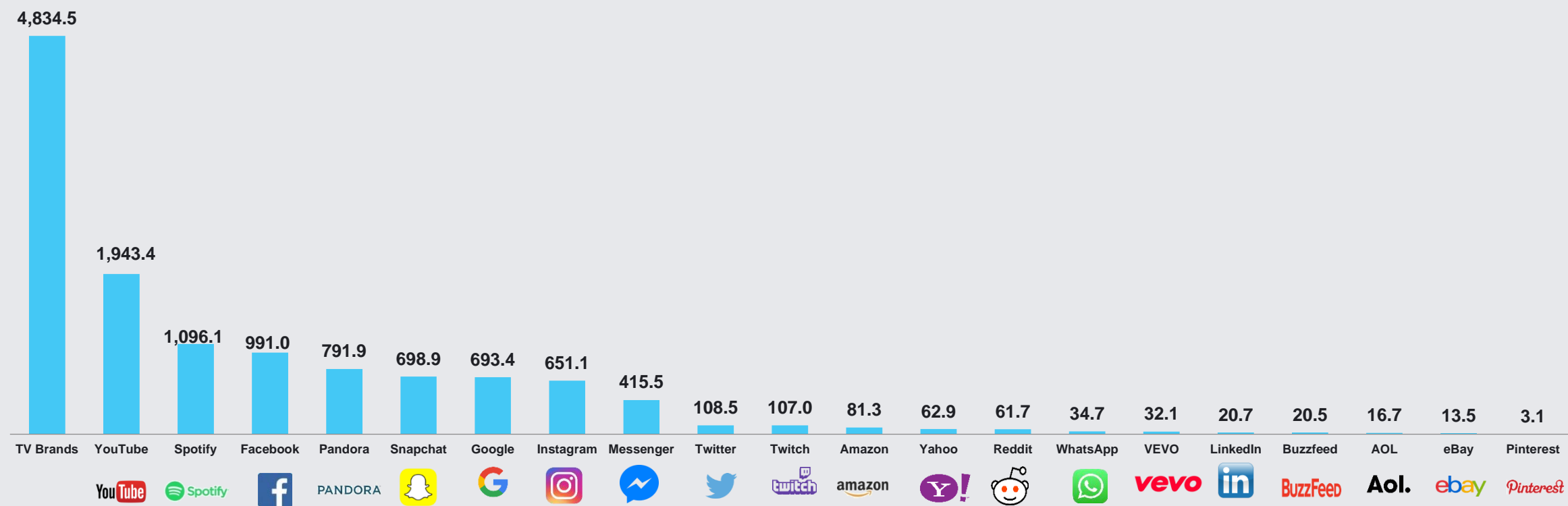
Note: Standalone Digital includes Paid Search, Display, and Short-Form Video advertising

Without Multiplatform TV's halo, average ROI would decline by:



Multi-Screen TV Reaches More Millennials Than YouTube, Facebook, Snapchat and Instagram Combined

5x more people are watching ad-supported TV content than are on Facebook and 3x more Millennials are watching ad-supported TV content than are on YouTube



Ready for what's next

TV keeps reinventing itself

It is future-proof



TV is the medium of the future

... that constantly re-invents itself by embracing new technological developments to provide viewers and advertisers with the highest quality products and services:

- Connected TV / Addressable TV
- VOD / MCN / MPN exposure
- Targeting & Data
- Drive to shoppers & customers
- Content / Influencer marketing
- Creative /immersion experience (AR / VR)
- Ad tech (Total Video Market Place)

g r : v : t :
alliance data & media

TVNOW

rtbf
auvio

VELOCITY
by Discovery™

SH STYLEHAUL

EBX
EUROPEAN BROADCASTER EXCHANGE
MEDIASET | TFI | ProSiebenSat.1 Media SE

ALL 4

ADD+
PLUS

Discovery^{vr}

viaplay

ONEDATA TFI PUBLICITE

RTL MCN

STUDIO 7

Stievie

Molotov.TV

Lovestv

OPEN
Λ . P .

... And many more



TV has it all