## 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



This video is only here as an example to illustrate the concept of TV (please note that rights haven't been cleared with NFL). Feel free to replace it with your own material.

#### 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





## 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



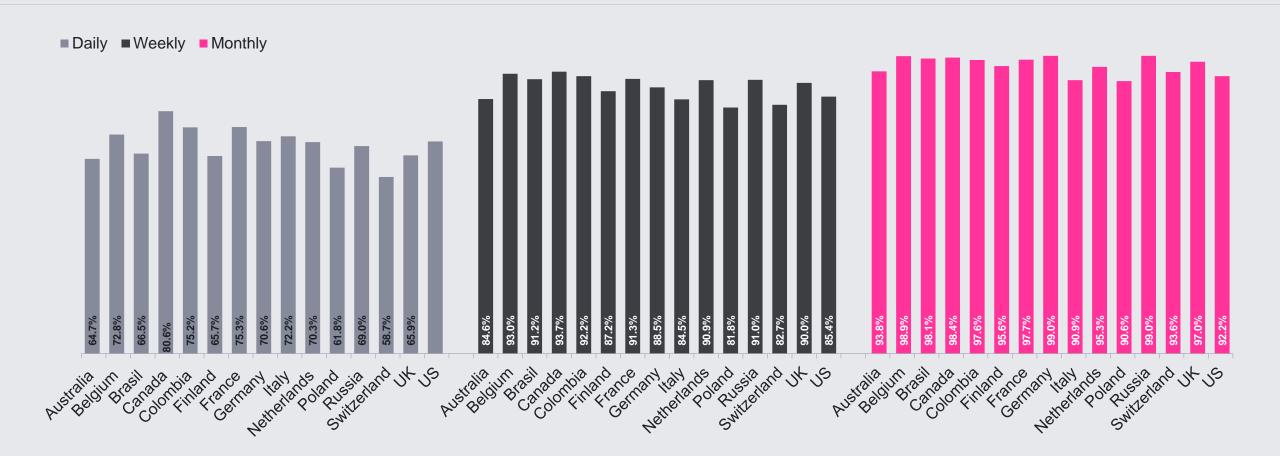
#### "TV is still really powerful for us. It is still the most mass reaching audience and it still works for us"

Marisa Thalberg, CMO of Taco Bell

*April 2017* 

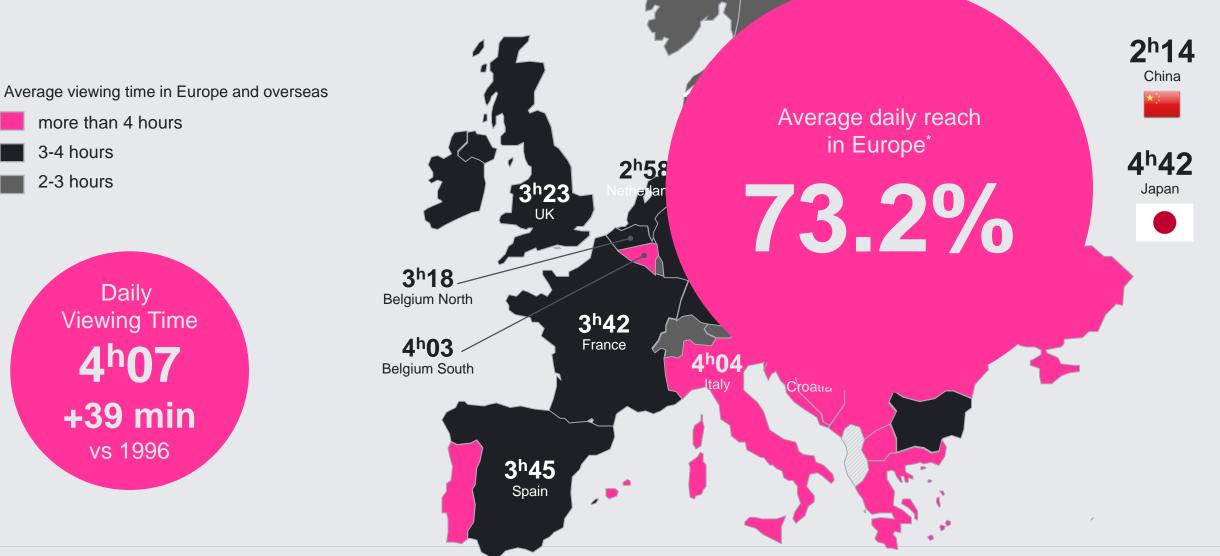


#### Incomparable reach all over the world





# TV is the fast track to reach consumers





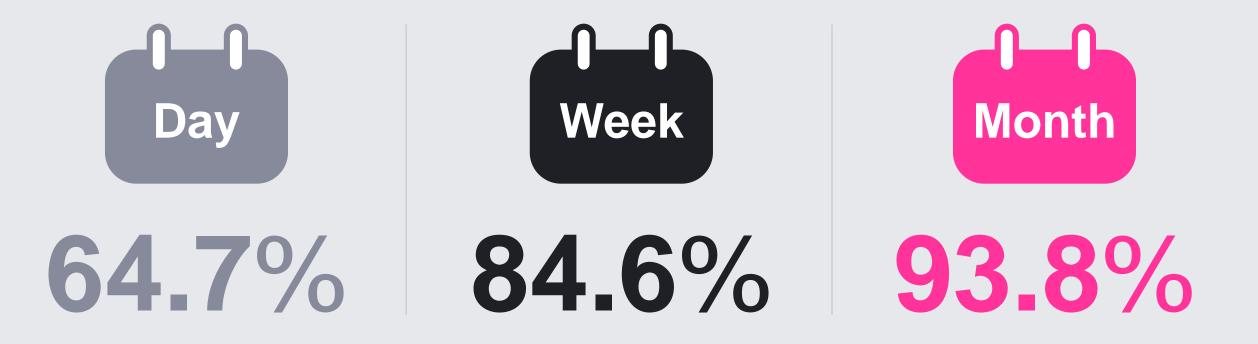
Source average viewing time: \*RTL AdConnects own calculations. Source: TV Key Facts 2018, Médiamétrie, Eurodata TV worldwide, all individuals, all day, January-December 2017 Source average daily reach : European Daily TV reach excluding Greece, Norway, Portugal and Slovenia, Development of daily TV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

EUROPE

4<sup>h</sup>16

USA

% of the Australian population

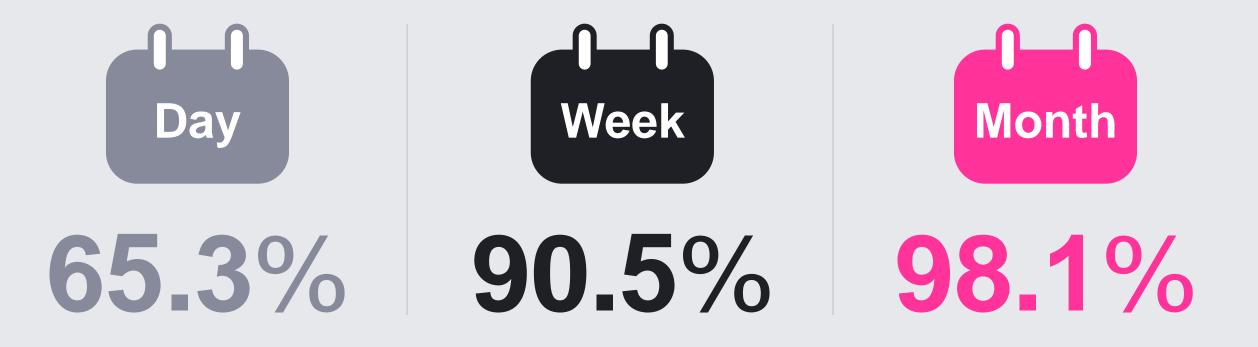




Source: OzTAM Metro, RegTAM Regional Agg+WA, Total Ppl, 1 minute reach Total TV National (inc. Central Australia), 0200-2600. Jan 2017 To Dec 2017 Includes live viewing and playback through the TV set at the time it is watched within 28 days. Time bands use the industry standard 26-hour TV clock: 0200-2600

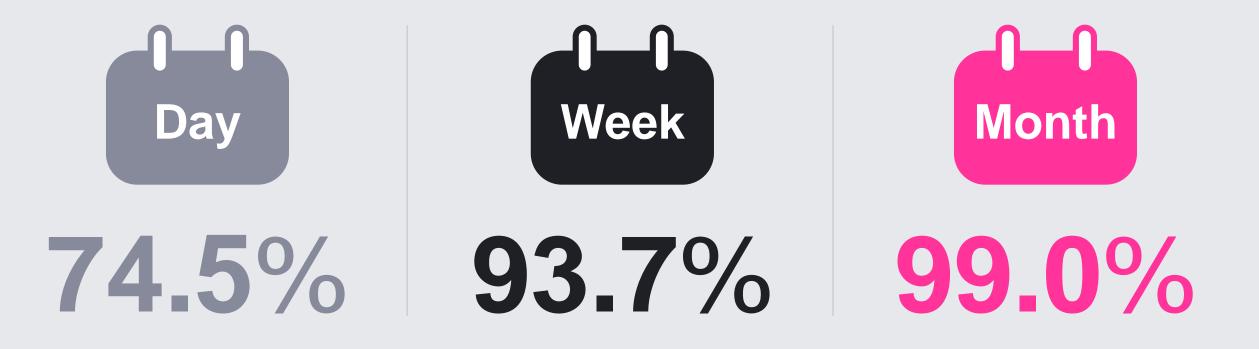
AUSTRALIA

% of the Austrian population





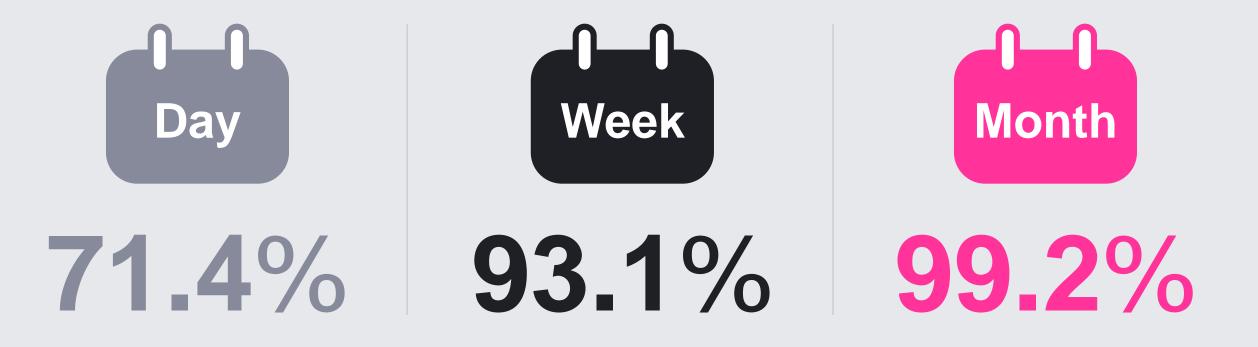
% of the North Belgian population





**BELGIUM NORTH** 

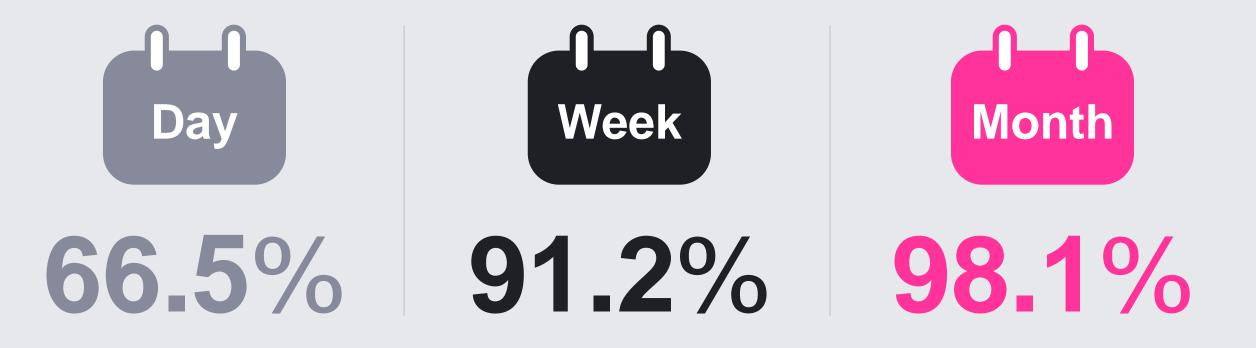
% of the South Belgian population





**BELGIUM SOUTH** 

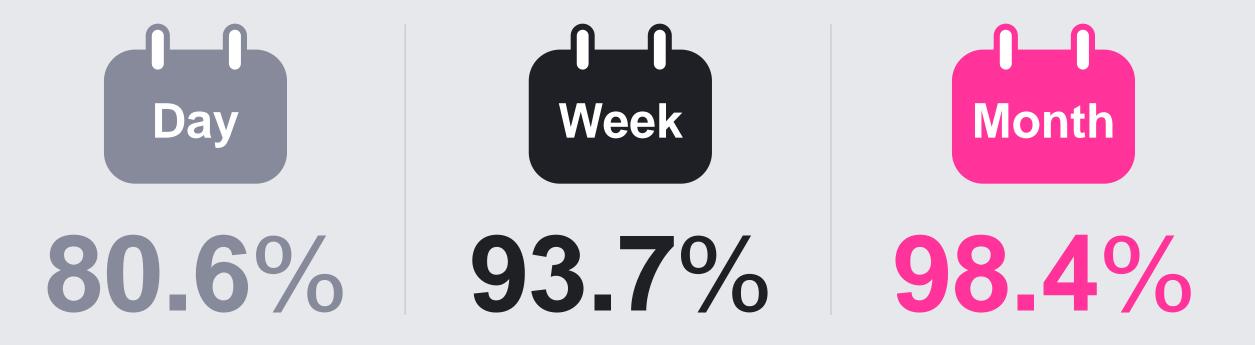
#### % of the Brazilian population





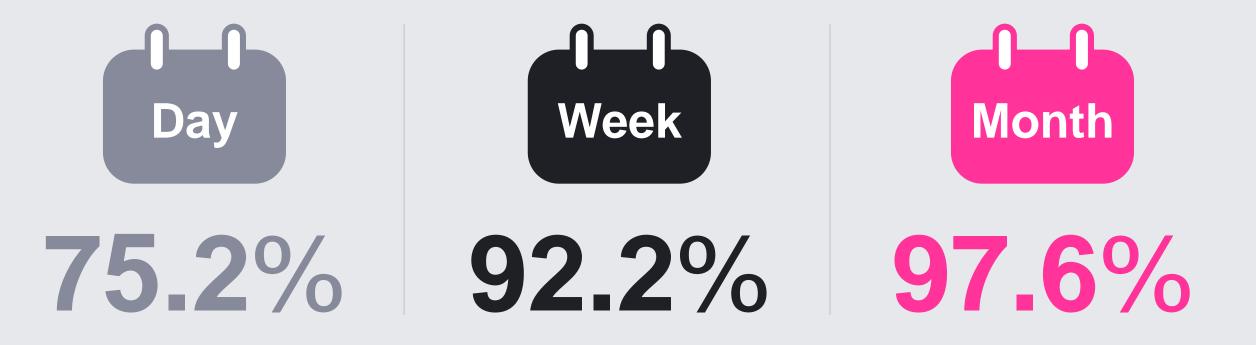
BRAZIL

% of the Canadian population





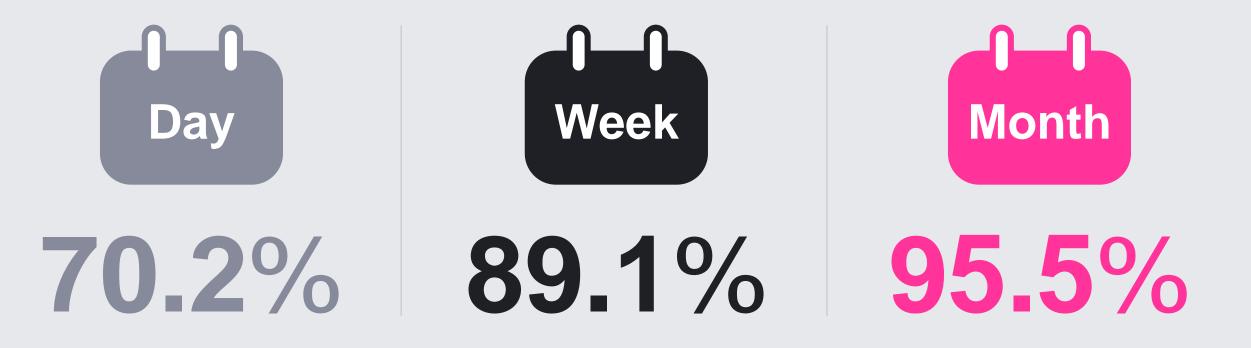
% of the Colombian population





COLOMBIA

#### % of the Czech population

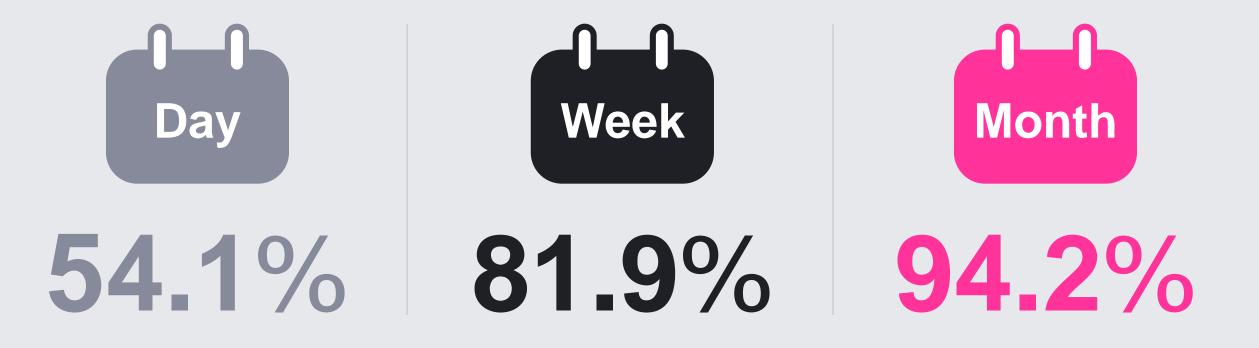




Source: y2017, ATO - Nielsen Admosphere, TV live + TSO-3. Reach: at least 3 min continuous viewing. Population: 4+

CZECH REPUBLIC

#### % of the Ecuadorian population

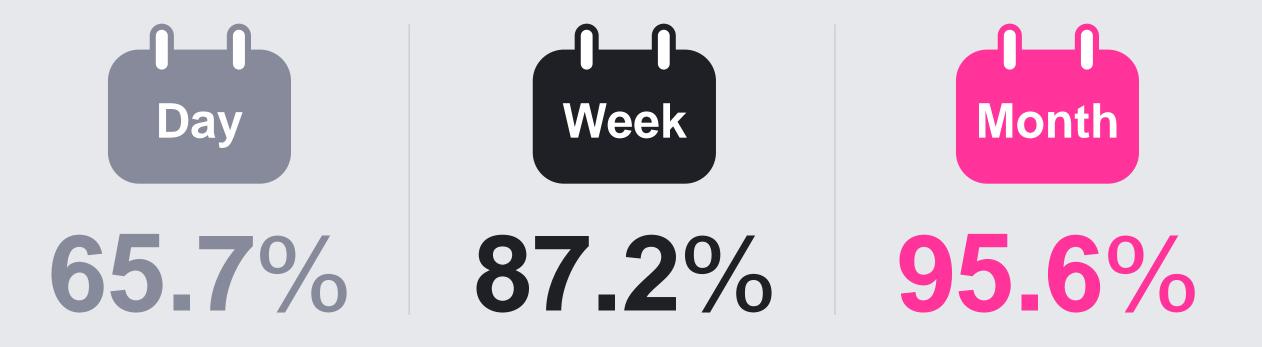




Source: Kantar Ibope Media Ecuador - Total TV. Period: January to November, 2017. From 06 to 06. Population: (3 years +) 4,850,550

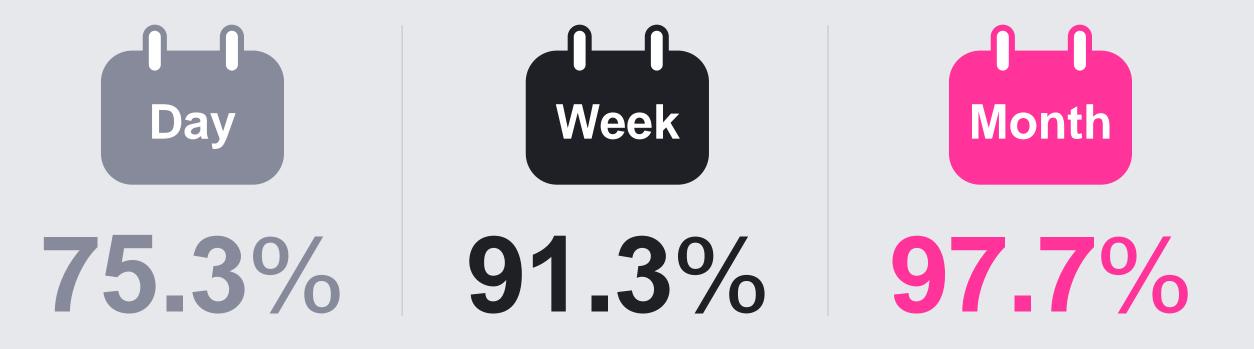
ECUADOR

#### % of the Finnish population



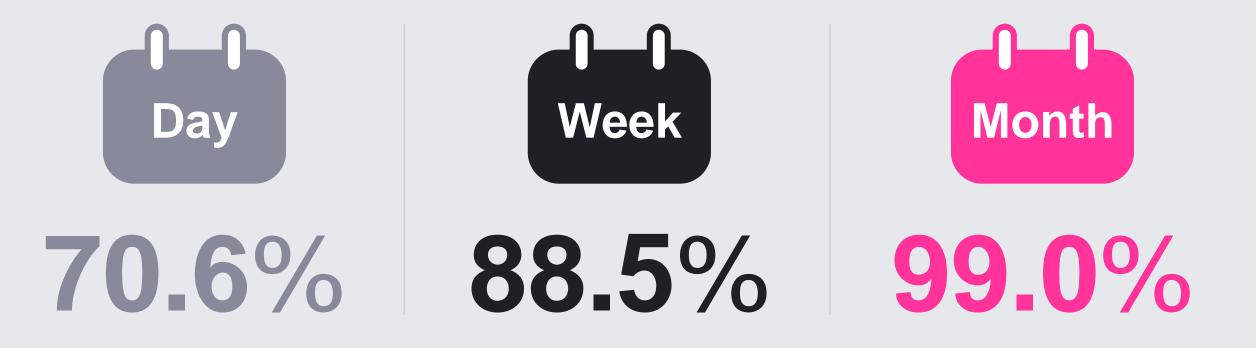


#### % of the French population





#### % of the German population

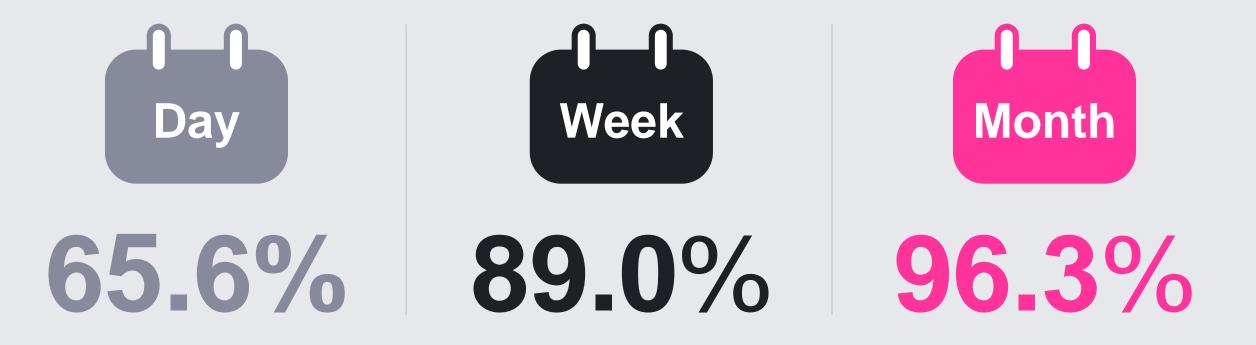




Source: AGF videoresearch in collaboration with GfK; videoScope 1.1, 2017; data weighted. Base: Adults 14+ years.



% of the Irish population

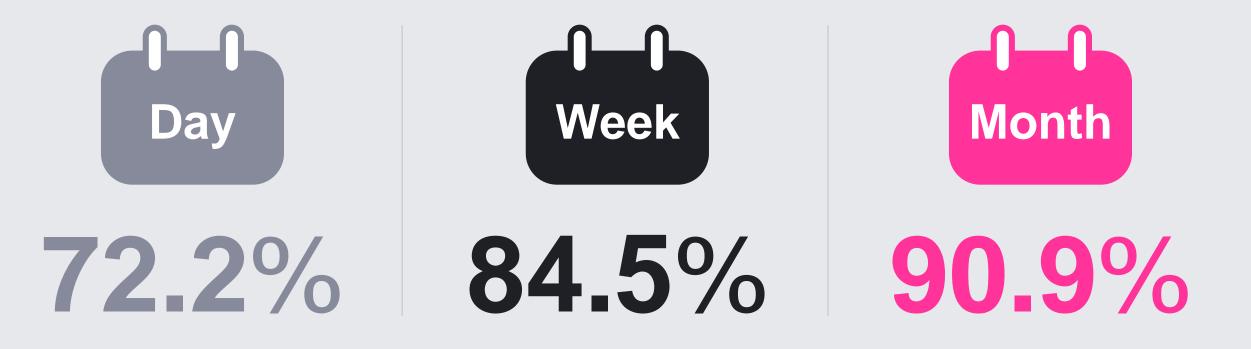




Source: All individuals. Period for Daily and Monthly reach: 01-01-2017 - 30-06-2017. Period for Weekly reach: 02-01-2017 - 25-06-2017

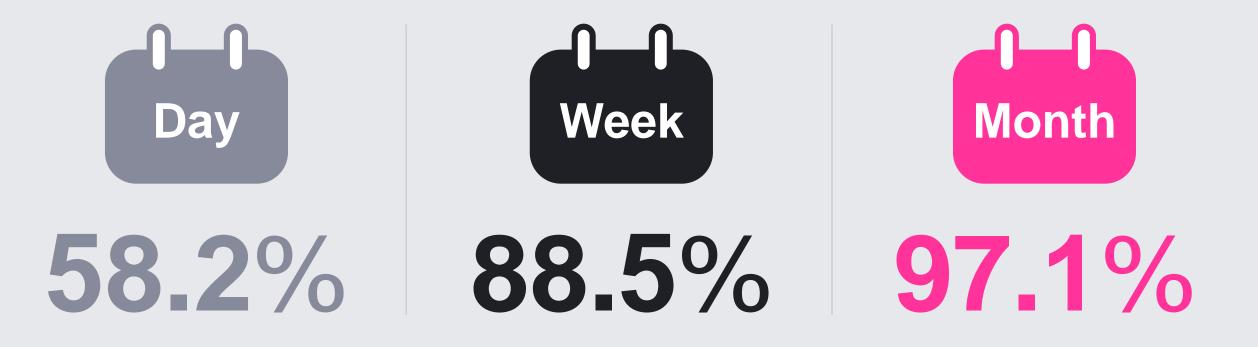
IRELAND

#### % of the Italian population



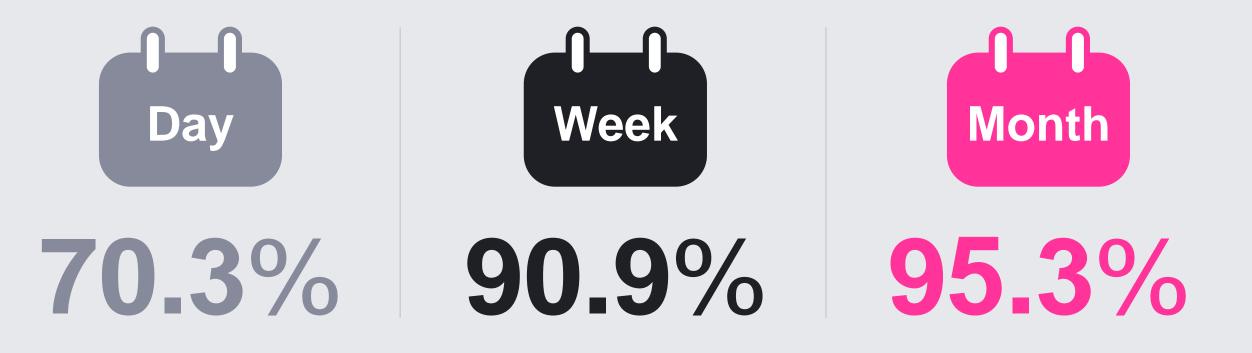


% of the Mexican population



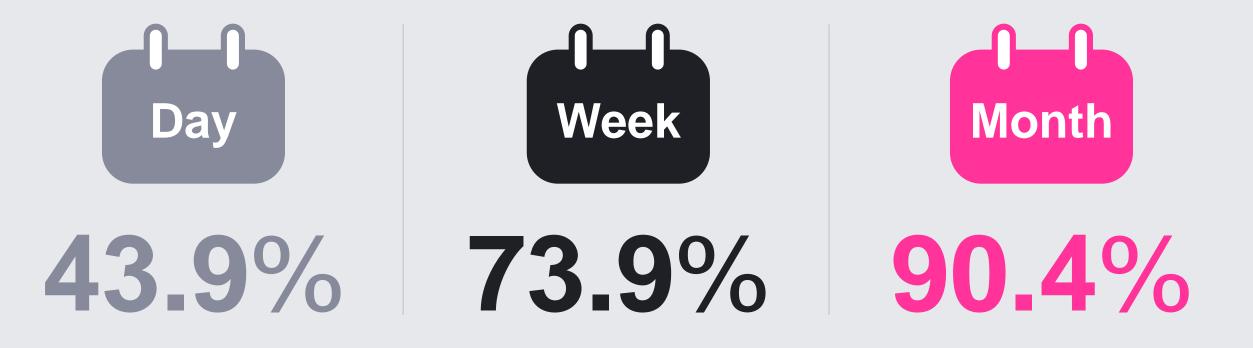


#### % of the Dutch population



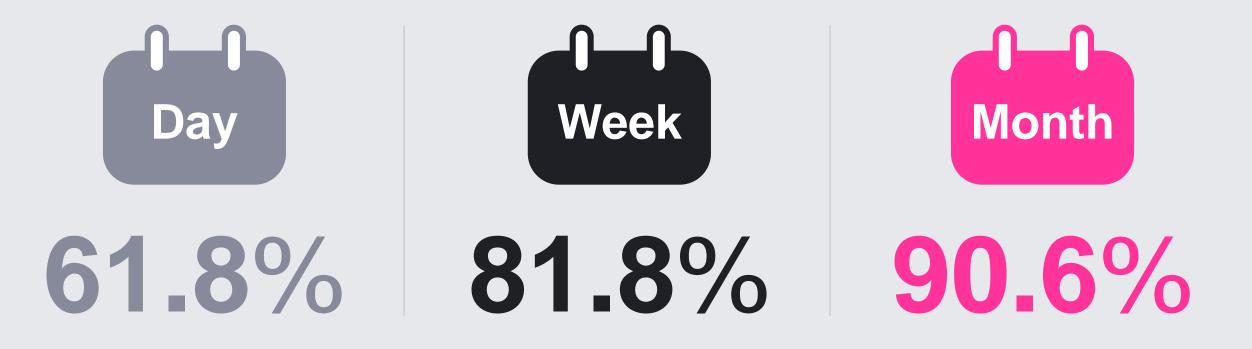


#### % of the Peruvian population





#### % of the Polish population



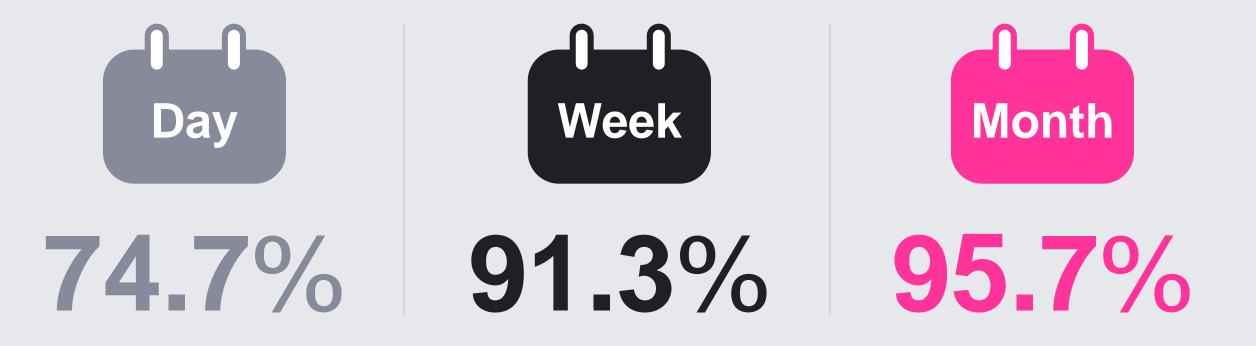


#### % of the Russian population





#### % of the Slovenian population

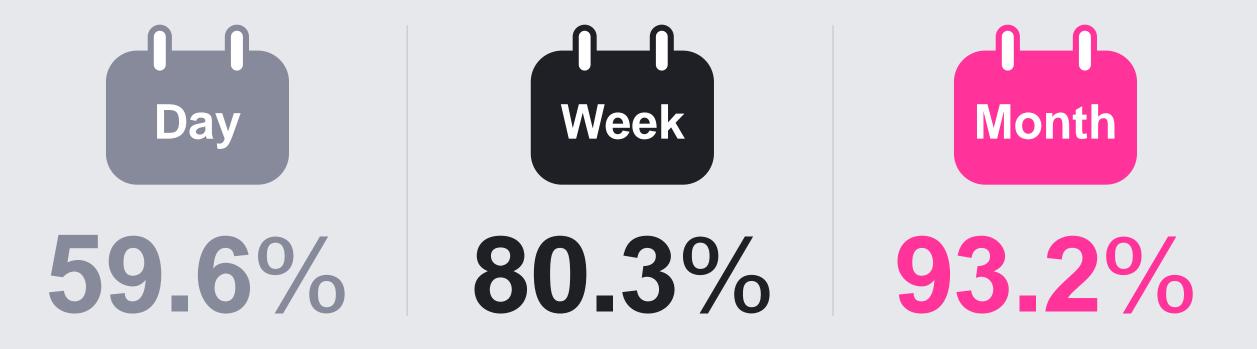




Source AGB Nielsen, based on average daily reach, average weekly cumulative and average monthly cumulative reach, based on 1 min of viewing, total individuals, total television. Q1 2018

SLOVENIA

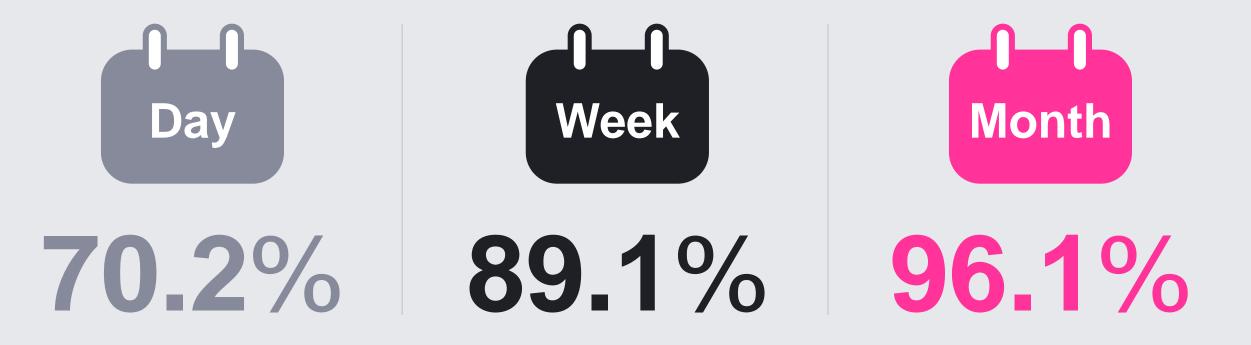
#### % of the Korean population





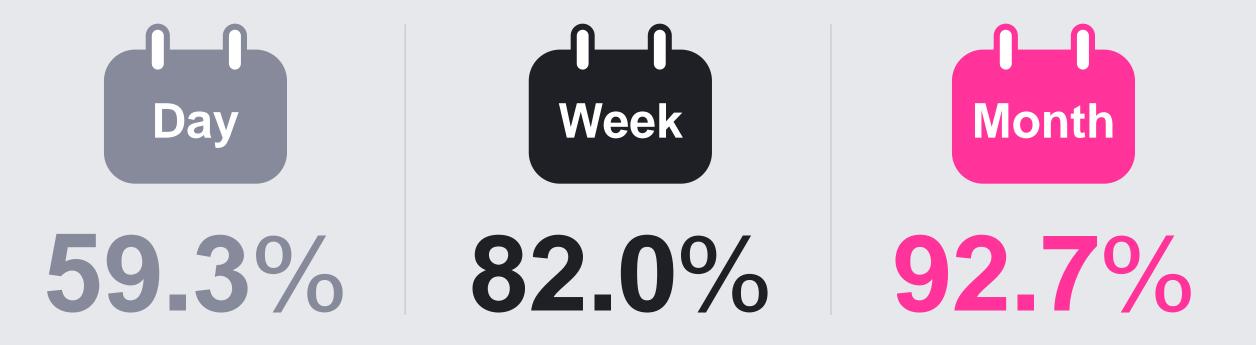
Source: Nielsen, year 2017, individuals 4+, reach 1min+. TV set viewing within 7 days of broadcast

% of the Spanish population





% of the Swedish population

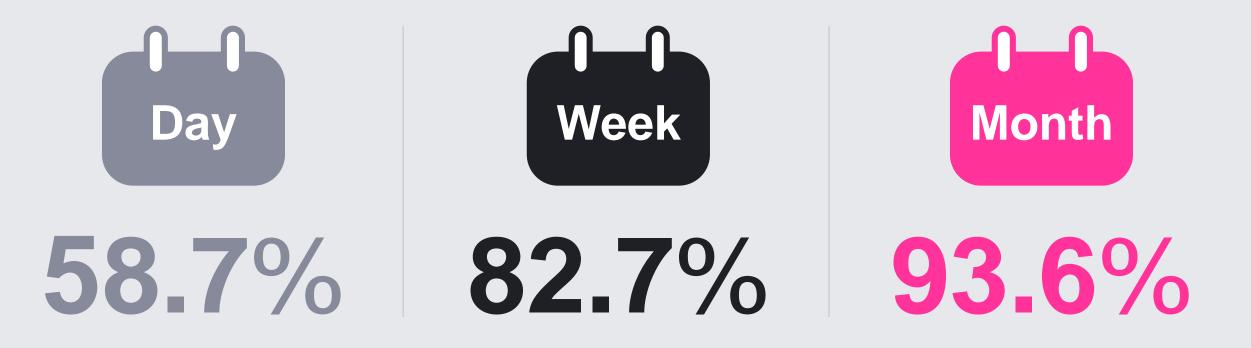




Source: MMS Advantedge, based on average daily reach, average weekly and average monthly reach, based on 1 min of viewing, total people, total broadcast television. Jan-sept 2018.

SWEDEN

#### % of the Swiss population





Source: Mediapulse TV-Panel (Instar Analytics), Total Commercial TV, Switzerland, Target group: individuals 3+ incl. guests, 2017, Mo-Su 24h, all platforms, Overnight +7, CH-Signal, reach 1 second

SWITZERLAND

#### % of the British population





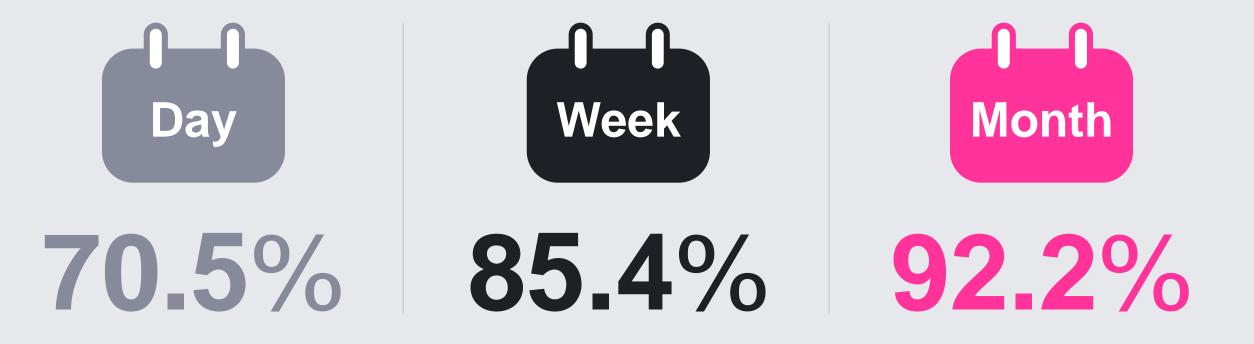
#### % of the Ukrainian population





# Unbeatable daily, weekly and monthly reach

% of the American population





# An average TV campaign gets millions of views Average number of contacts (in million) per country, based on a 400 GRP campaign

38,5



1,300

· ~ ~ ~

An average broadcast TV campaign in Australia gets:



#### **Million views**

Base: 400 TARP. Total Population, 5 metropolitan Cities, 3 Station Buy, Main Channel. Source: TV Map 2018

An average broadcast TV campaign in Austria gets:





An average broadcast TV campaign in North Belgium gets:



#### **Million views**

Base: 400 GRP. Source: CIM TV, 4+ / North / 2017

An average broadcast TV campaign in South Belgium gets:



#### **Million views**



Base: 400 GRP. Source: CIM TV, 4+ / South / 2017

An average broadcast TV campaign in Brazil gets:



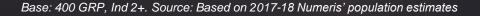
#### **Million views**

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:







### 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:



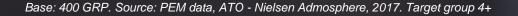
#### **Million views**

Base: 400 TGRPS. Source: Ibope, June of 2017, Universe: 19.368.910 . Total TV (Broadcast TV + Cable) - Cable = Channels disaggregated by Ibope. Actual Figure: 77.475.640



An average broadcast TV campaign in Czech Republic gets:







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:





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:



#### 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**



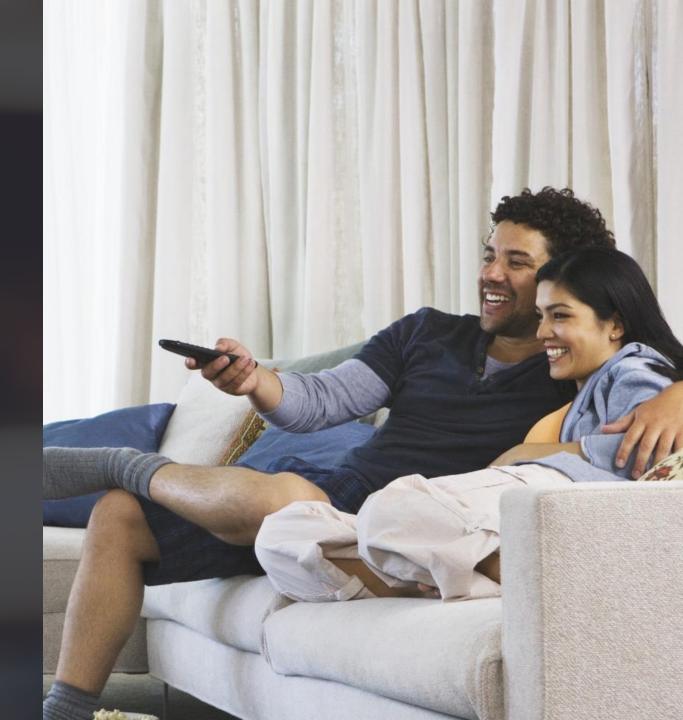
Base: 400 GRP. Source: 2016 Stichting KijkOnderzoek (SKO)

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:





An average broadcast TV campaign in Russia gets:



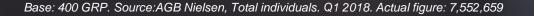
#### **Million views**

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:







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



#### **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:

#### **Million views**

38.5

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:







An average broadcast TV campaign in the UK gets:

### Million views

238

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

138

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:



#### **Billion views**

Base: 400 GRP. Source: Nielsen Universe Estimates 2018/2019, P2+ TV Population: 315,600,000



# 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

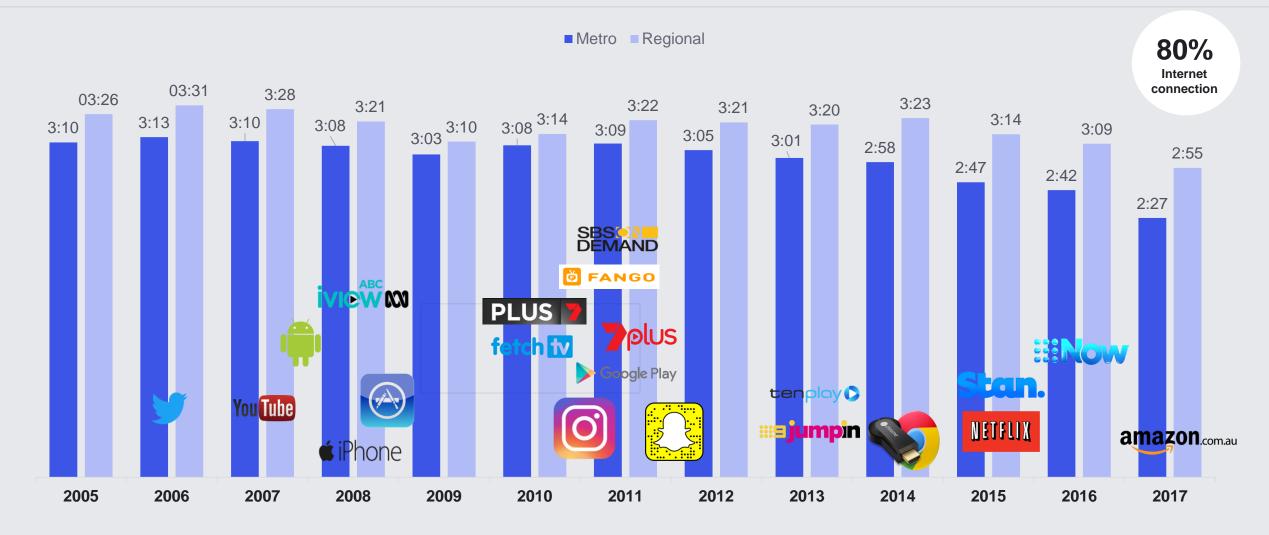
September 2018



Source: https://adage.com/article/cmo-strategy-columns/tv-advertising-works/314810/

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

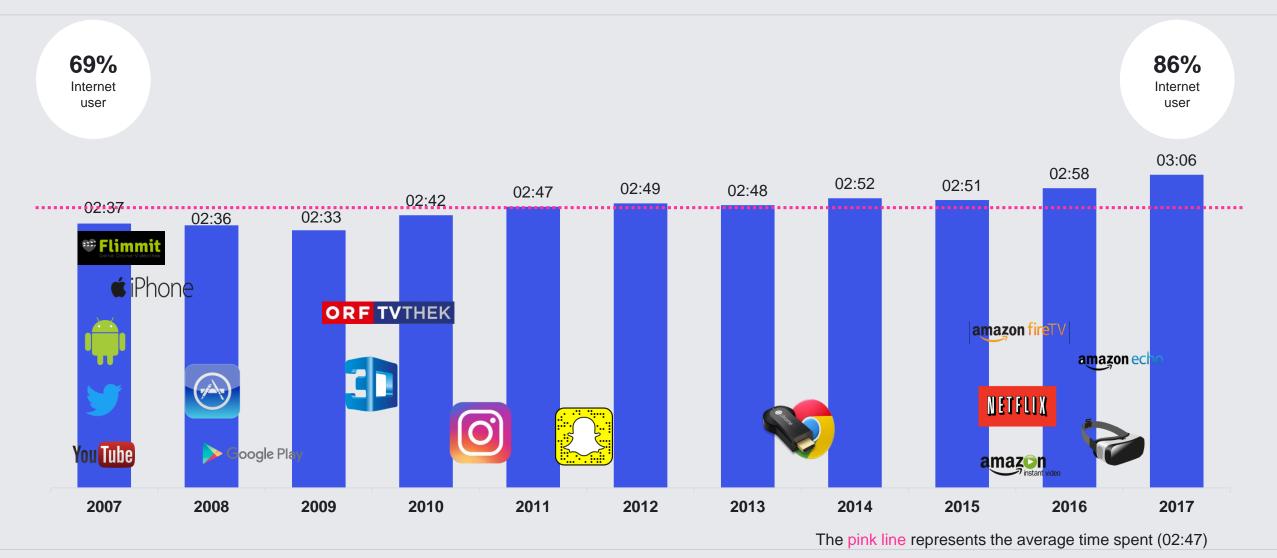




Source: OzTAM Metro, RegTAM Regional Agg+WA, Total Ppl, Average Time Viewed (Universe) HH:MM, Total TV, 0200-2600. Jan 2005 To Dec 2017.

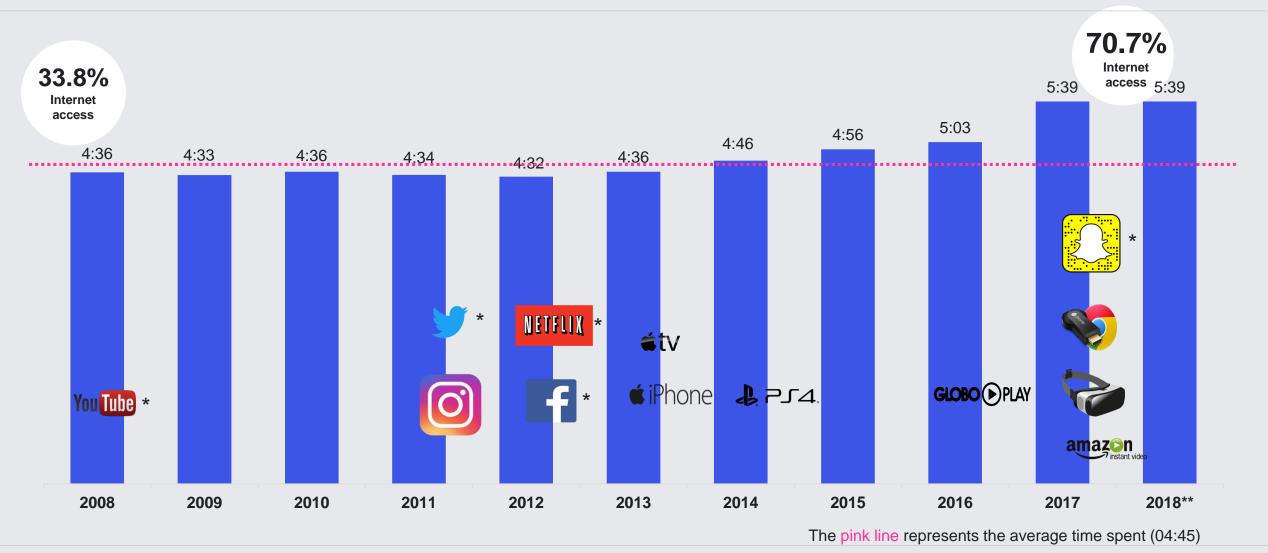
#### The Clobal TV Group Includes live viewing and playback through the TV set at the time it is watched within 28 days. Time bands use the industry standard 26-hour TV clock: 0200-2600. Does not include any live streaming or VOD

#### **AUSTRALIA**





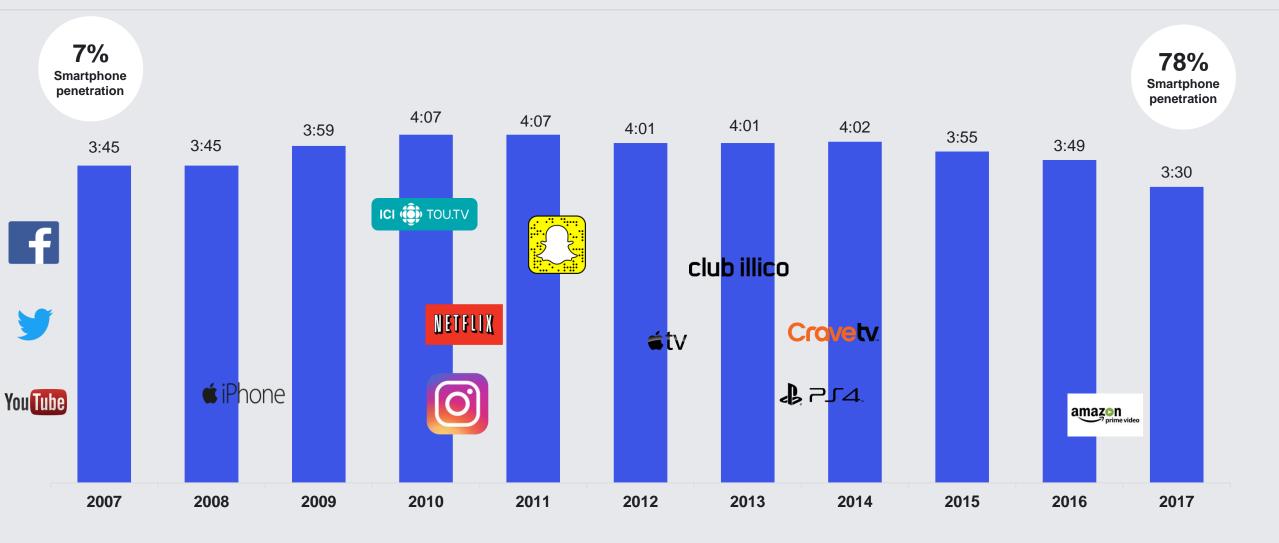
AUSTRIA





Source: Kantar IBOPE Media – MW Telereport – Jan'07 to May'18 – (main broadcast television) (\*\*) May '18 - Target: Viewers from Atlas Globo – 202.420.696.. Internet data source: Internet World Stats – Internet Usage and Population Statistics (December 31, 2017). (\*) Brazilian version.

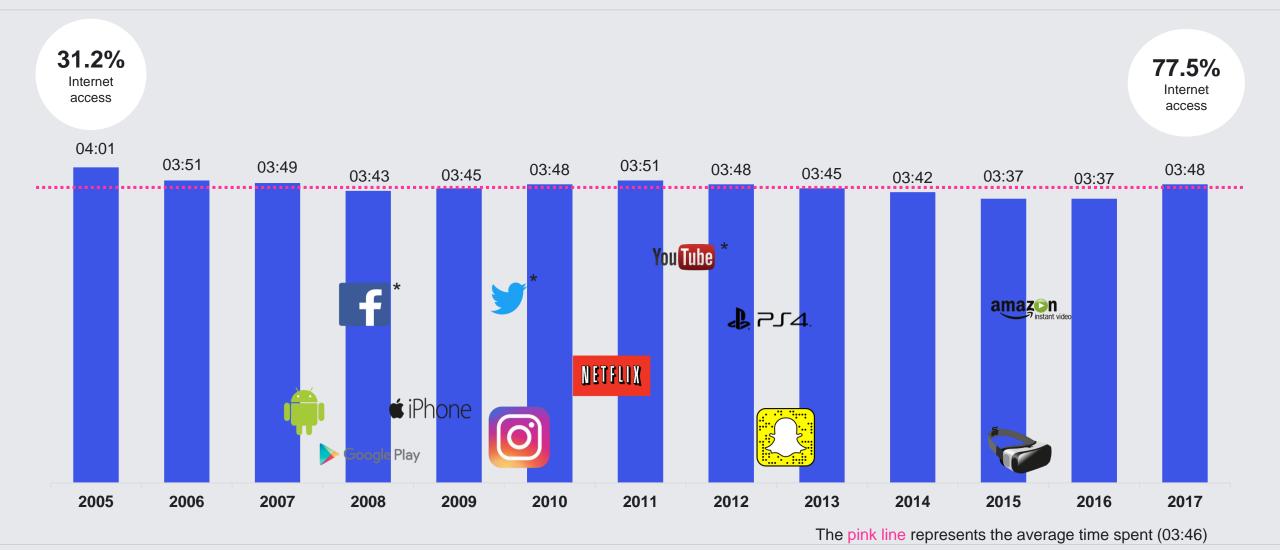
#### BRAZIL





Source: Numeris PPM Total Canada, Total TV, A18+, M-Su 2a-2a, Consolidated, All Locations, Calendar years. OMD Canada, Media Technology Monitor. Smartphone penetration figures: MTM.

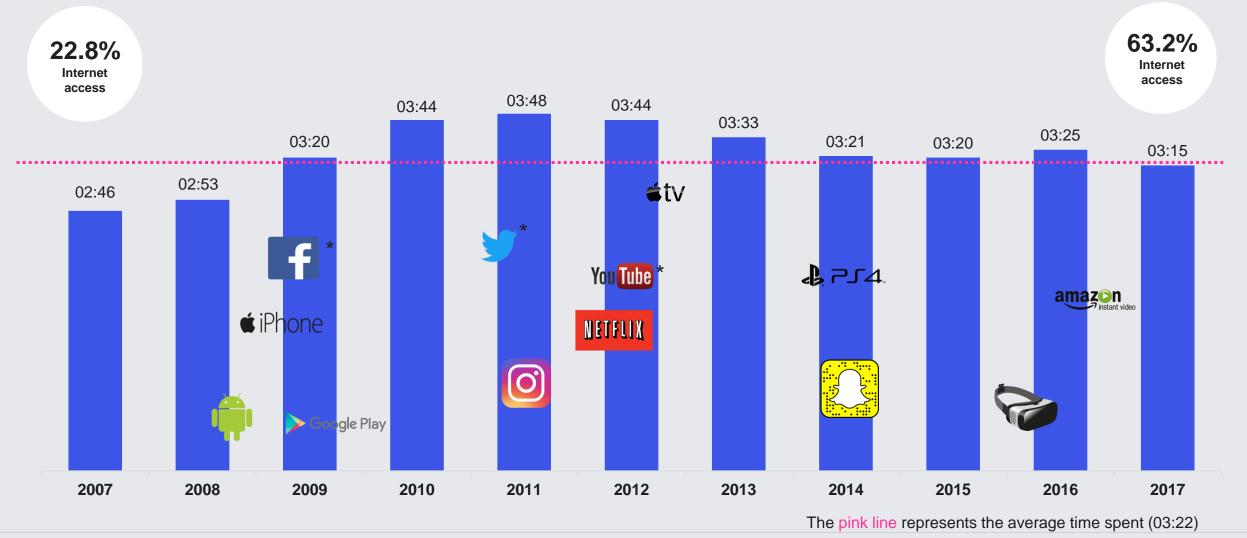
CANADA



The Clobal TV Group

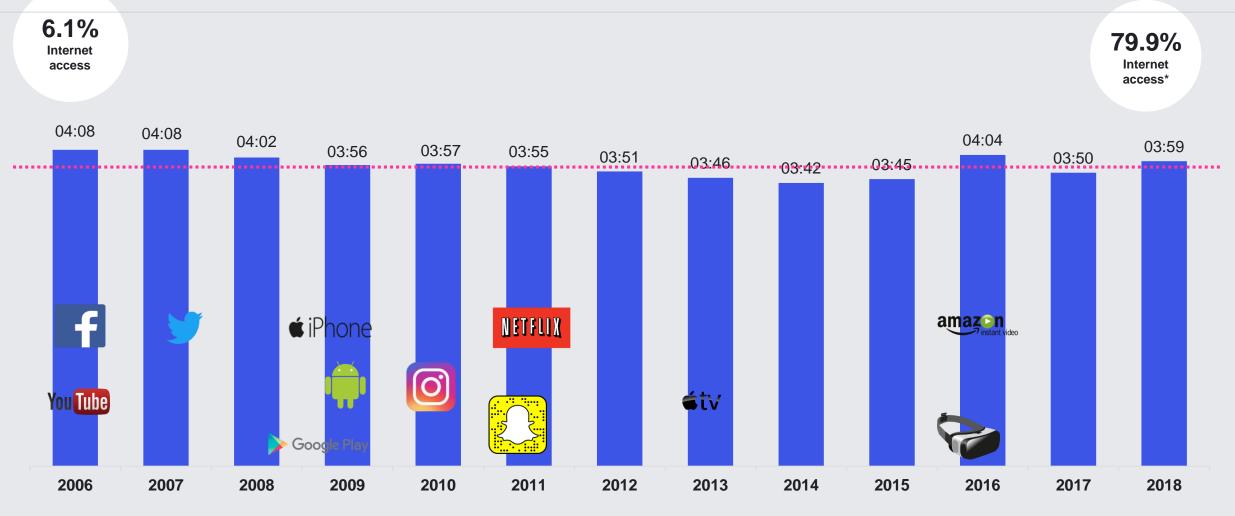
Source: Source: Kantar Ibope Media, ATS variable used to extract this information. Channels - MEGA - TVN - CHV - LA RED - CANAL 13 - UCV + TOP 15 CABLE. Total population 4+. Internet data source: Internet World Stats – Internet Usage and Population Statistics (December 31, 2017). Services launch Dates Source: Centro Internacional TV Abierta (\*) local version.

CHILE





#### COLOMBIA

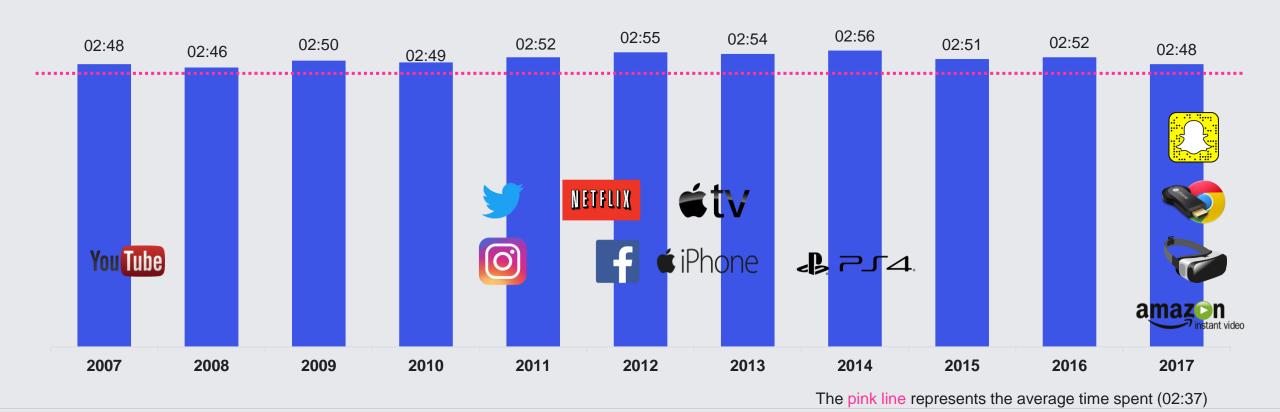


The pink line represents the average time spent (03:55)



Source: Kantar Ibope Media Ecuador. January 1, 2006 to June 30, 2018 – Broadcast TV. Internet Data Source: IInternet World Stats – Internet Usage and Population Statistics (December 31, 2017). (\*) Estimated 2018's number.

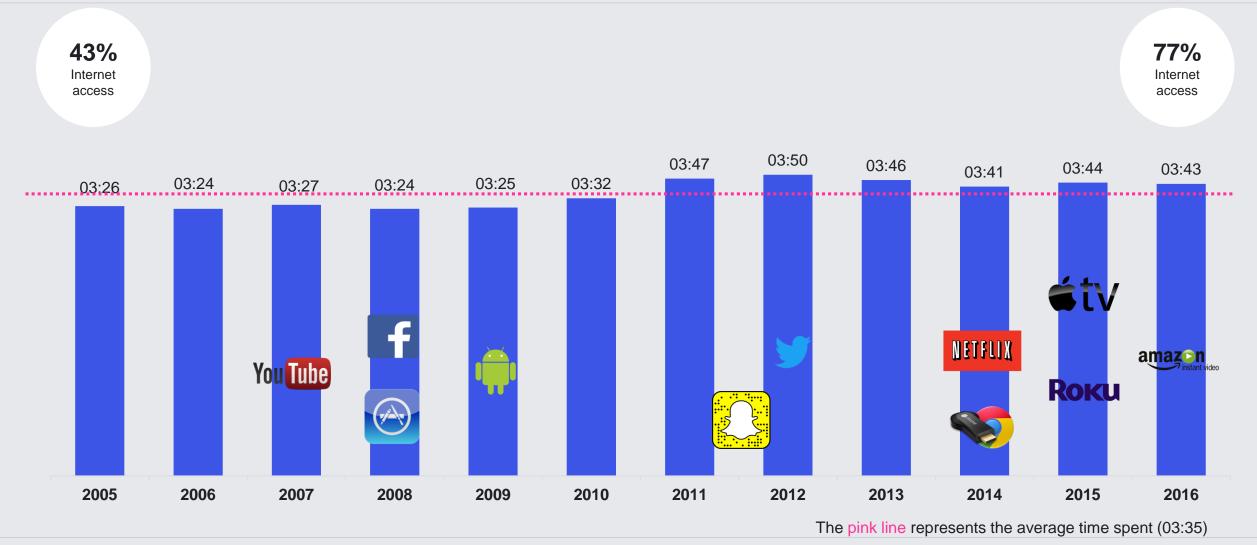
#### ECUADOR



The 💽 Global Source: Finnpanel Oy, TAM, 2018.

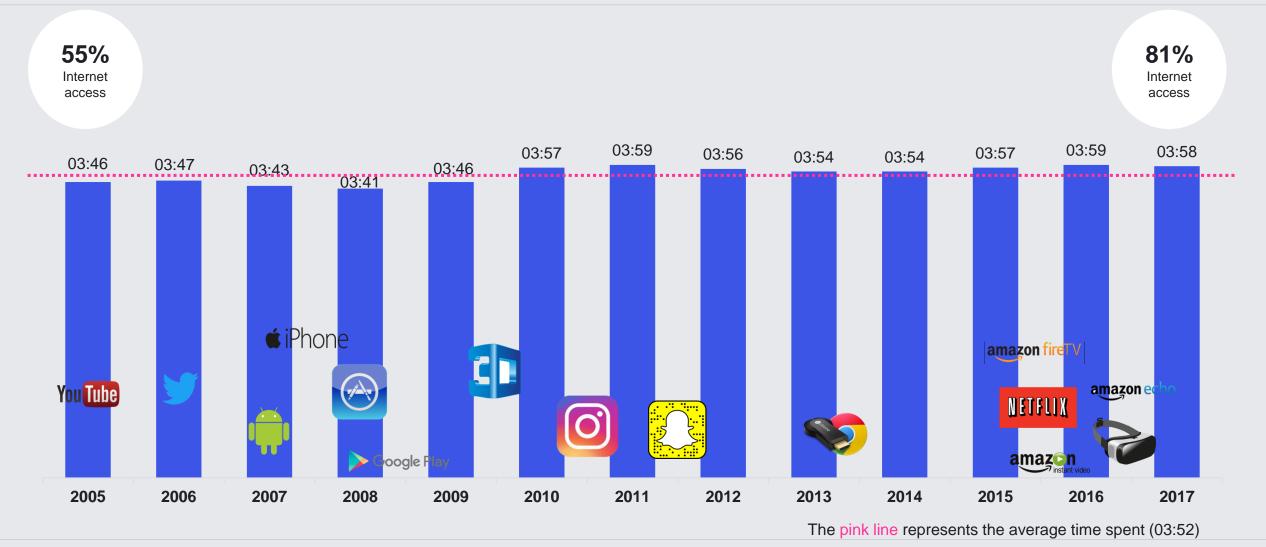
TV Group

#### FINLAND





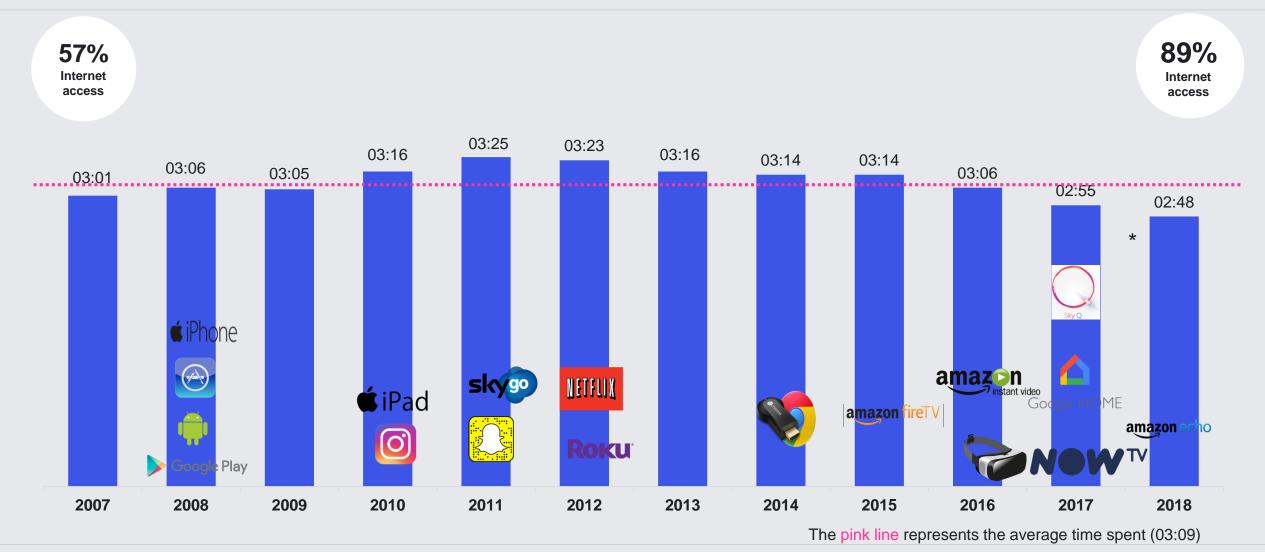
### FRANCE





Source: AGOF internet facts 2005-IV; AGOF digital facts 2017-12; AGF videoresearch in collaboration with GfK; videoScope 1.1, 01.01.2005-31.12.2017, SevenOne Media

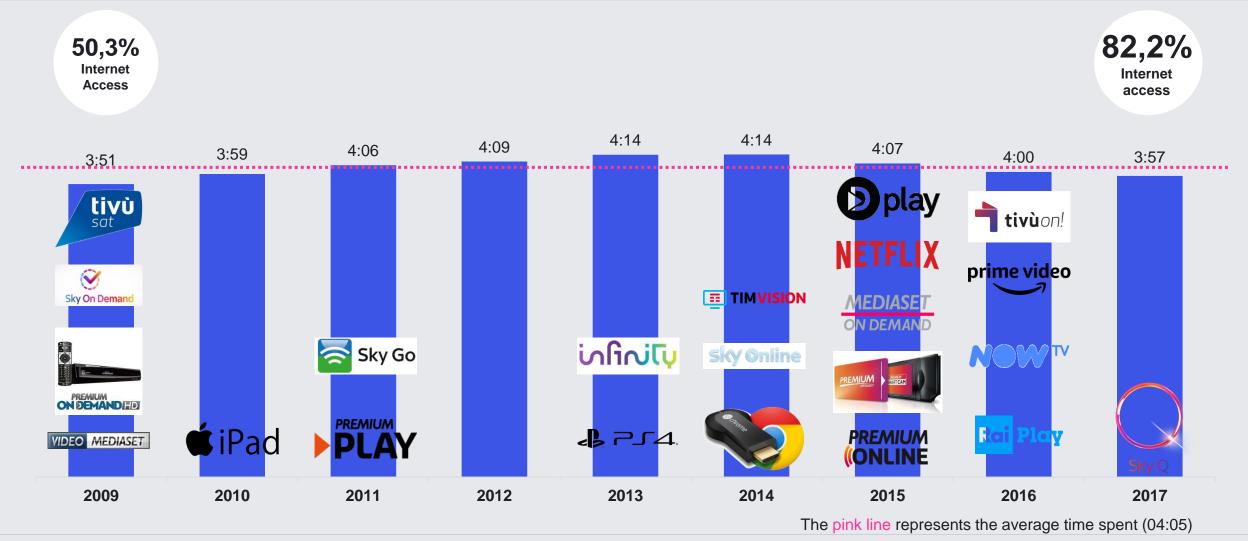
#### GERMANY



The Global TV Group

Average time spent per person Source: TAM Nielsen – Jan'07 to 18 Jul'18 – (main broadcast television) 2007 % of households with internet access source: CSO.ie ICT Ireland 2007 2017 % of households with Internet access source: CSO.ie

#### IRELAND

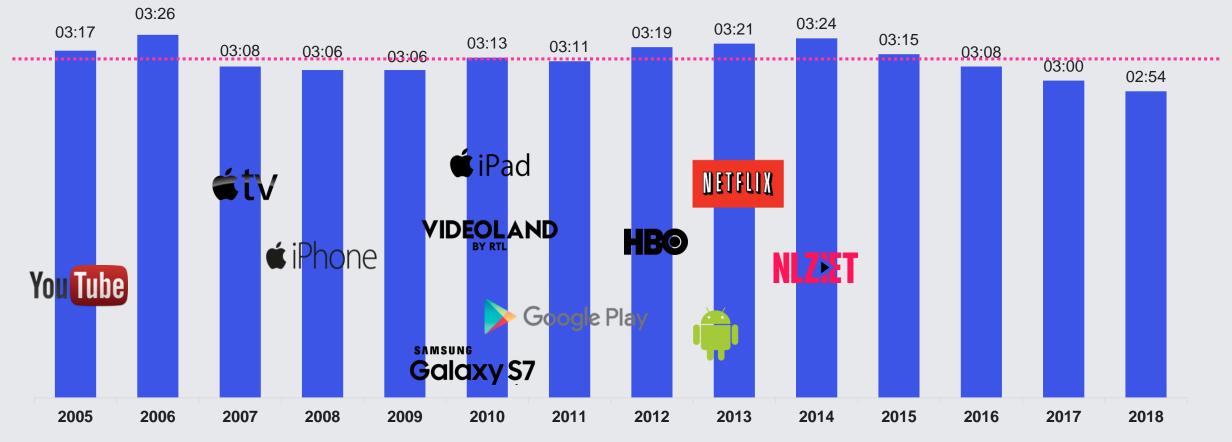




Sources – Internet access: Audiweb Trends, September 2009; Auditel/Audiweb establishment survey 2017 (Households with Internet access via at least one device). Hours of TV viewed: Auditel. Target: Individuals +4 y.o.



### Hours of Broadcast TV viewed on a TV set per day

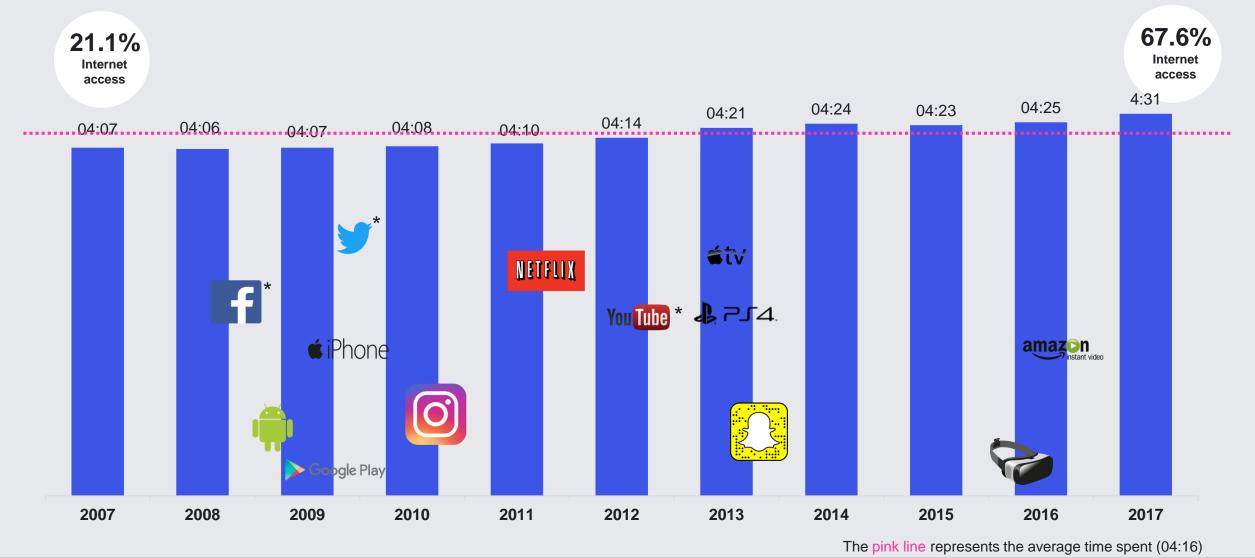


The pink line represents the average time spent (03:12)



#### **NETHERLANDS**

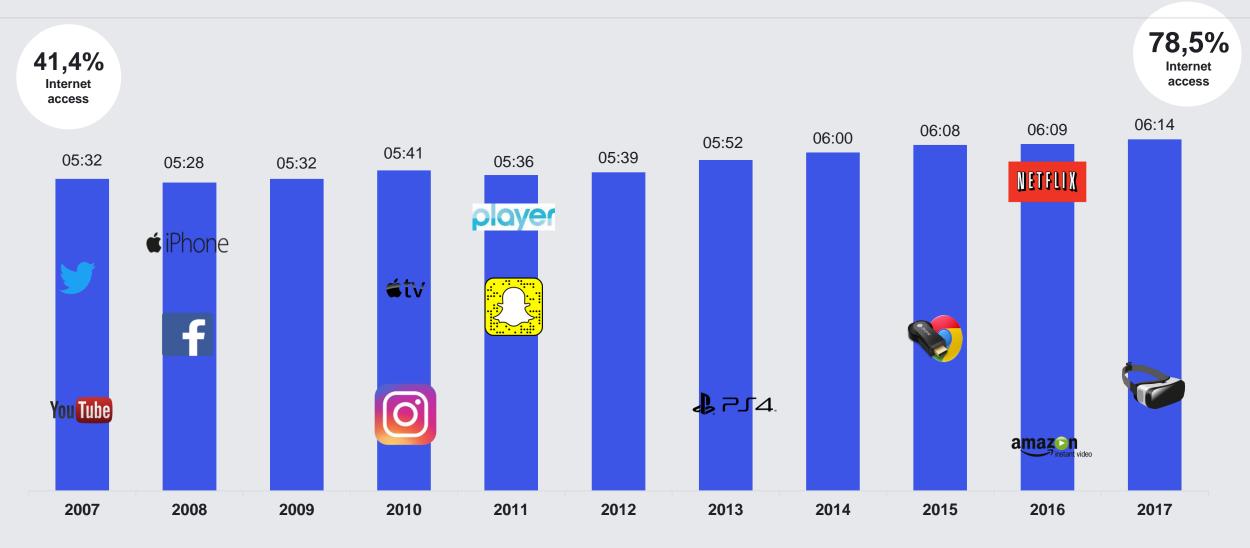
### Hours of Broadcast TV viewed on a TV set per day





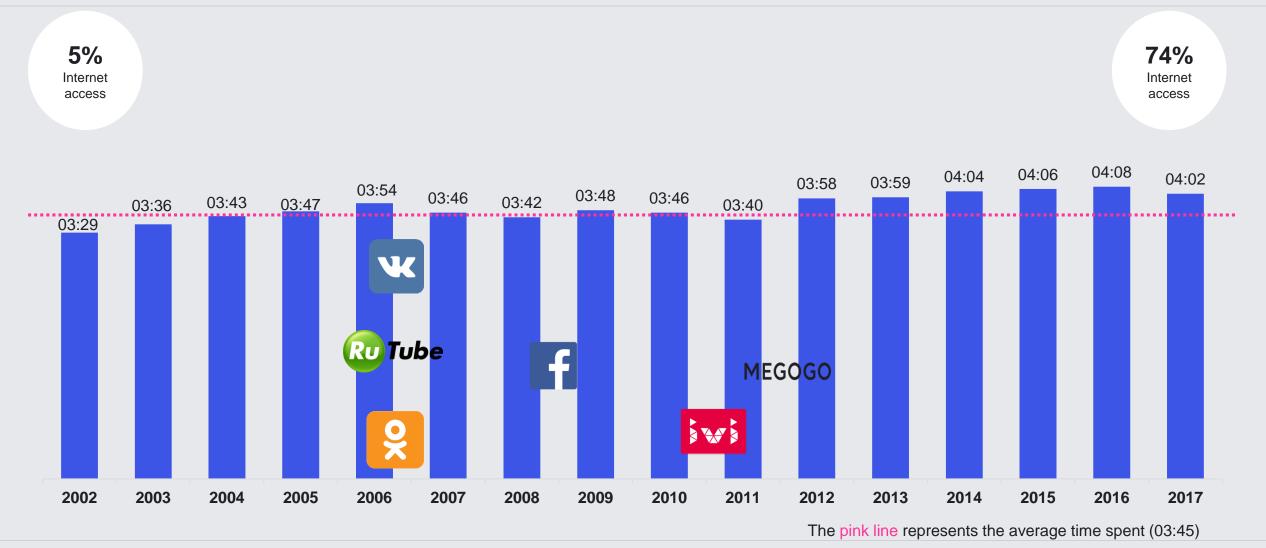
Source: Kantar Ibope Media. Total Population (age +4 in 2007 to 2011; age 3 to 99 in 2012 to 2017). Lima + 6 Cities. 07:00 a.m. to 12:00 a.m.. Mon to Sun – Free-to-air TV (main broadcast television). Internet World Stats – Internet Usage and Population Statistics (December 31, 2017). Services launch Dates Source: Centro Internacional TV Abierta (\*) local version.





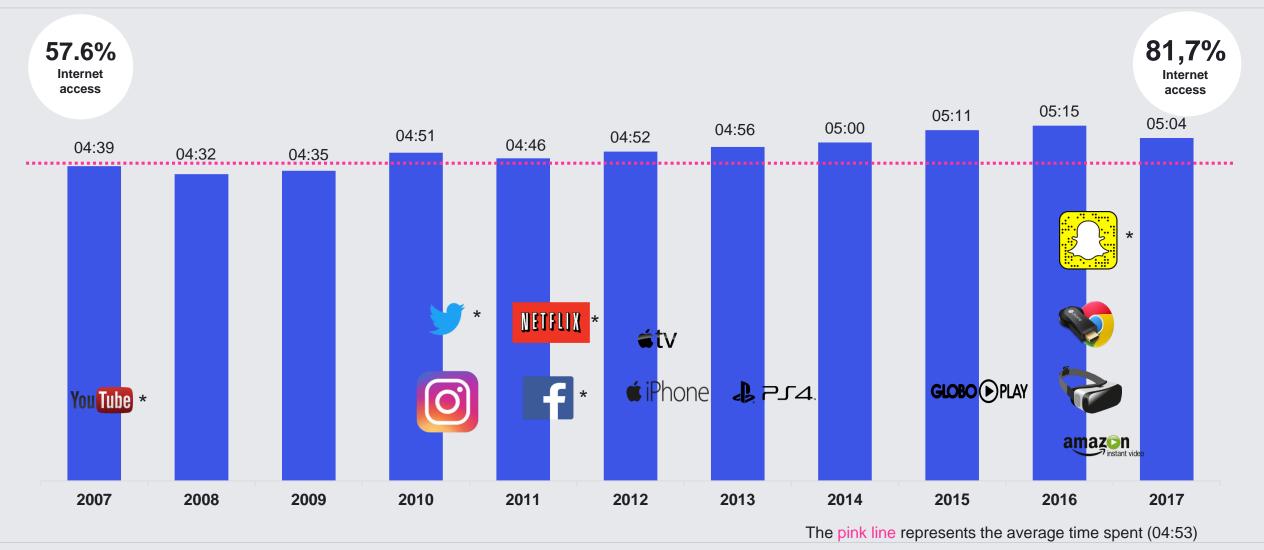


POLAND





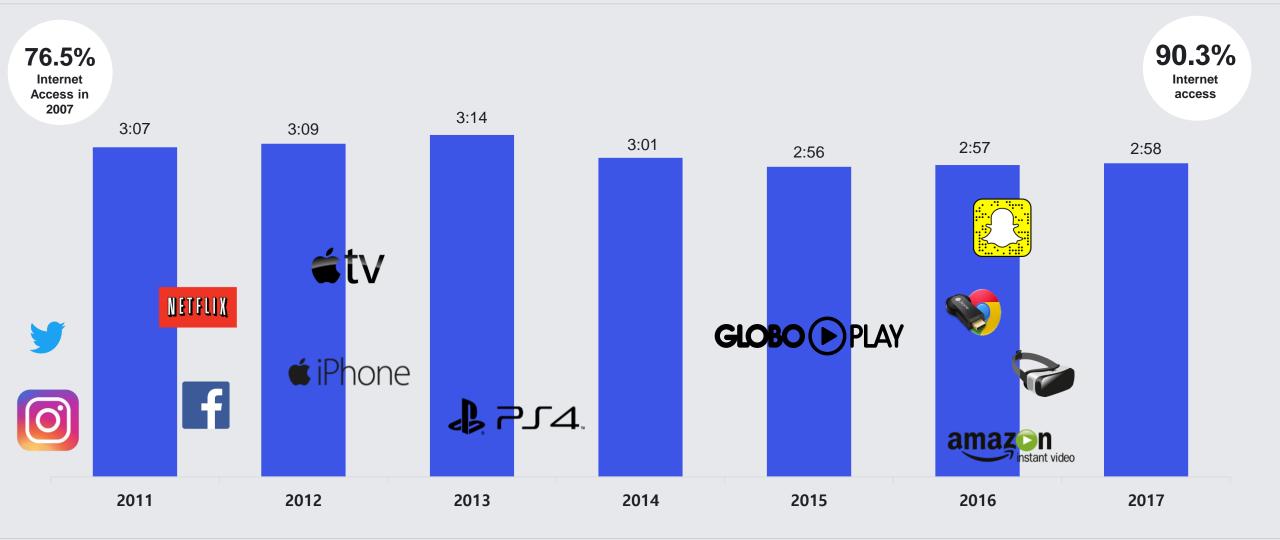
#### RUSSIA





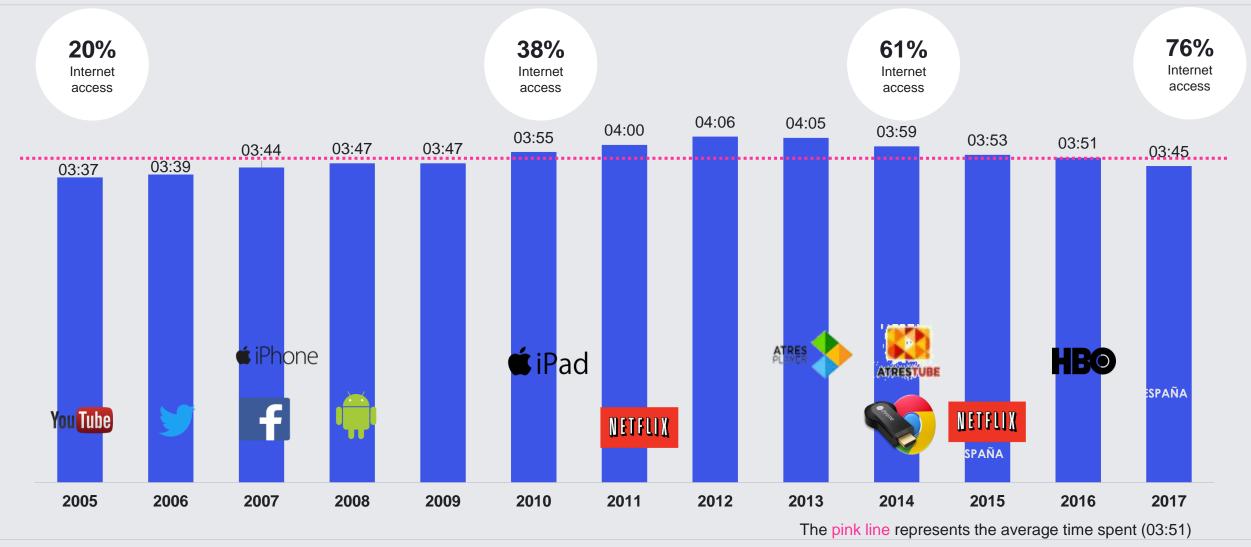
Source: AGB Nielsen Media Research – Jan'07 to Dec'18. / Target Group total individuals, total television. Internet Data: Source SURS, HousEholds 2007 & 2017

#### SLOVENIA

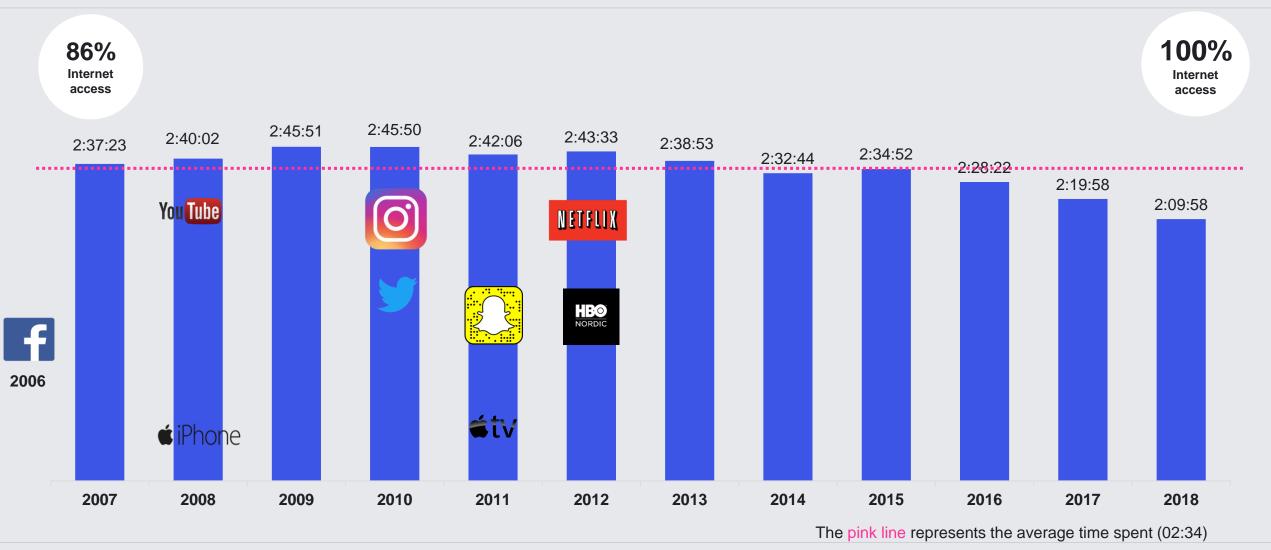




#### SOUTH KOREA



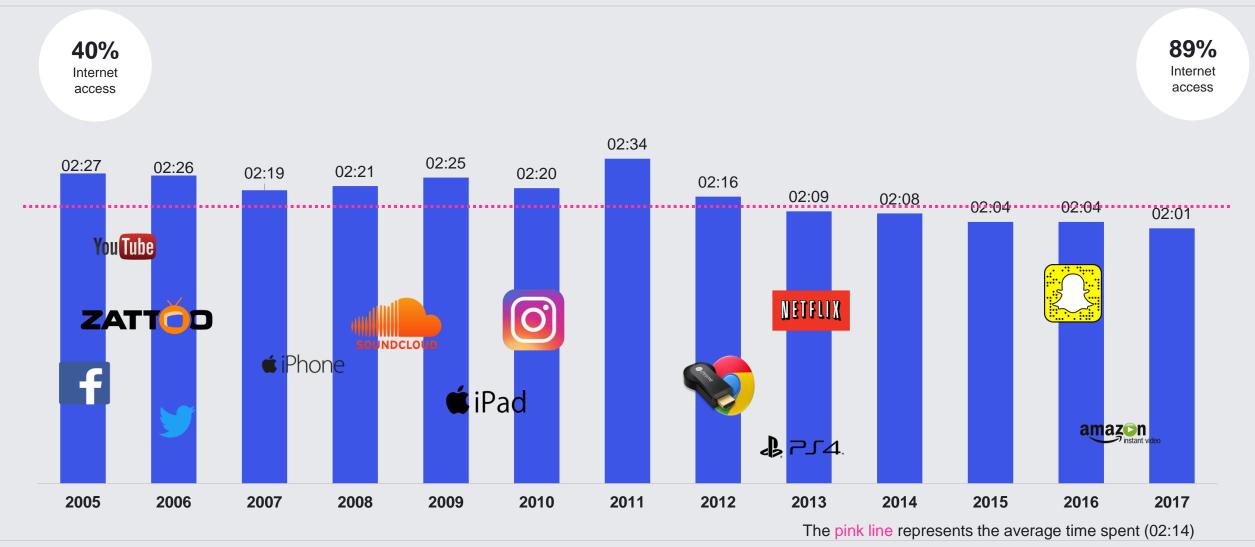




The Global TV Group

Source: MMS Advantedge, 3-99yrs, total TVviewing, 2007-2017 fullyear, 2018 jan-sept.

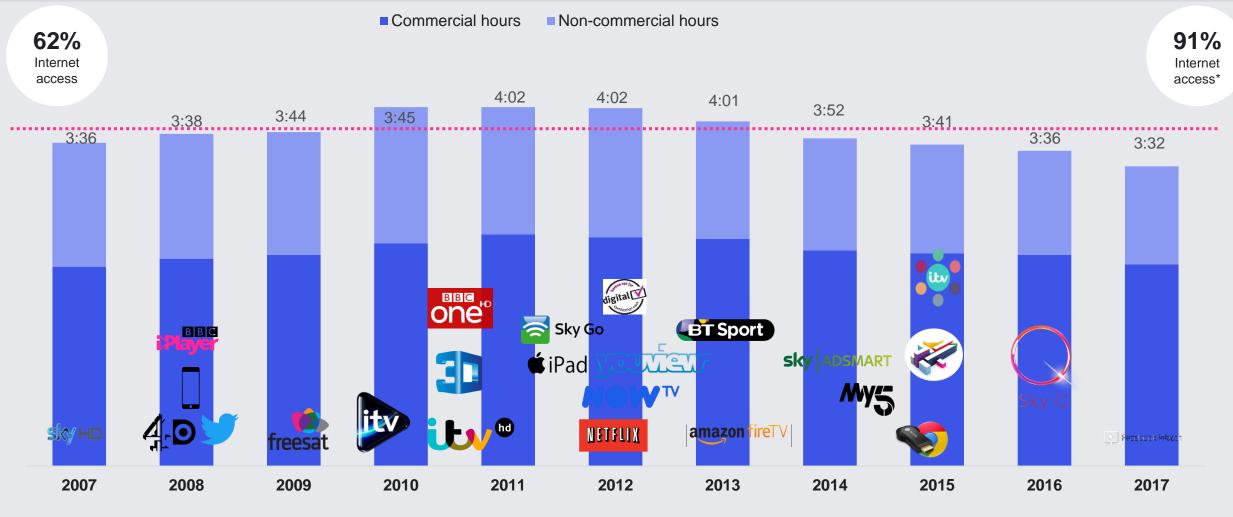
#### SWEDEN





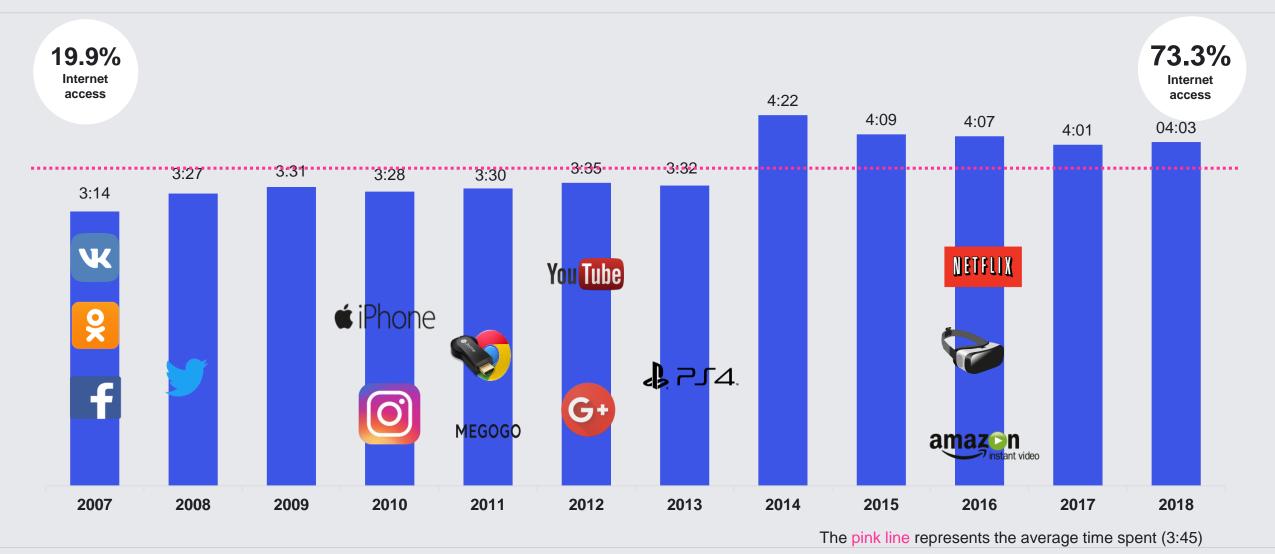
Source 2000-2012: Mediapulse Fernsehpanel, (GfK) TV Nutzung D-CH; 3+, 24h, SD (TV Nutzung in Min. pro Tag). Source 2013 onwards: Mediapulse Fernsehpanel (Kantar), TV Nutzung D-CH, Overnight+7. Source digital: Net-Metrix Base 2017-2, Bundesamt für Statistik, widest circle of users

#### SWITZERLAND



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





The Global TV Group

Source: GfK Ukraine – Markdata – Jan'07 to Dec'13. Nielsen Ukraine - Markdata – Jan`14 to June`18 Internet Data: TNS Ukraine, Galileo , MMI Ukraine'2007/4 – Dec`07, MMI Ukraine'2018/2 – June `18

#### UKRAINE

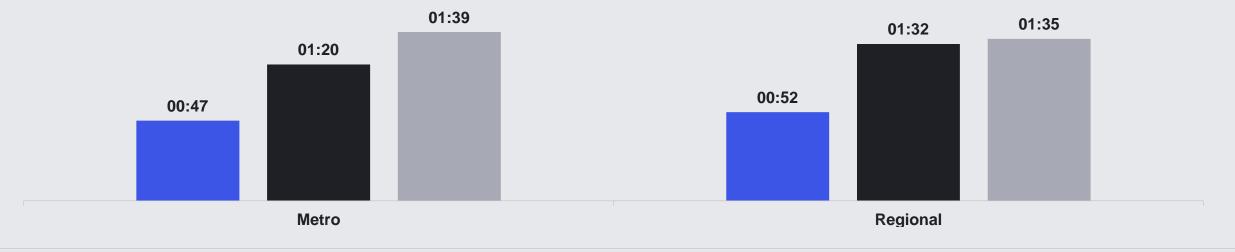
### Today's younger generation is tomorrow's heavy TV viewers



## 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





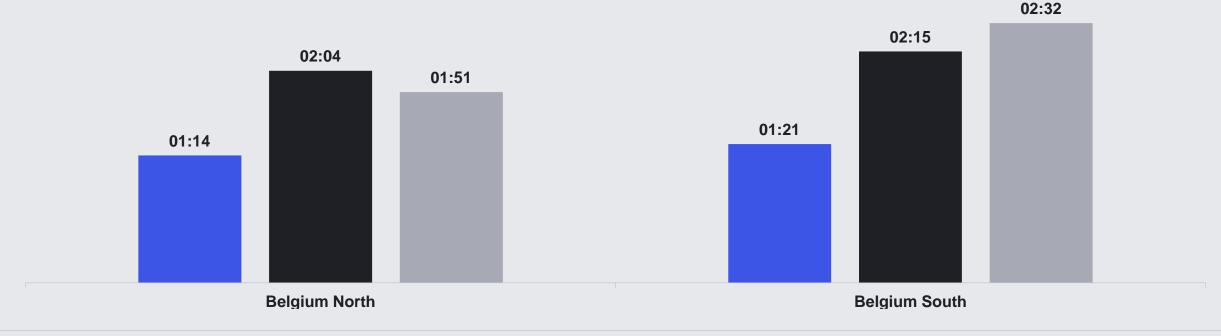
Source: OzTAM Metro, RegTAM Regional Agg+WA, Total Ppl, Average Time Viewed (Universe) HH:MM, Total TV, 0200-2600. Jan 2018 to June 2018 . Includes live viewing and playback through the TV set at the time it is watched within 28 days. Time bands use the industry standard 26-hour TV clock: 0200-2600

#### AUSTRALIA

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

Average hours viewed per day

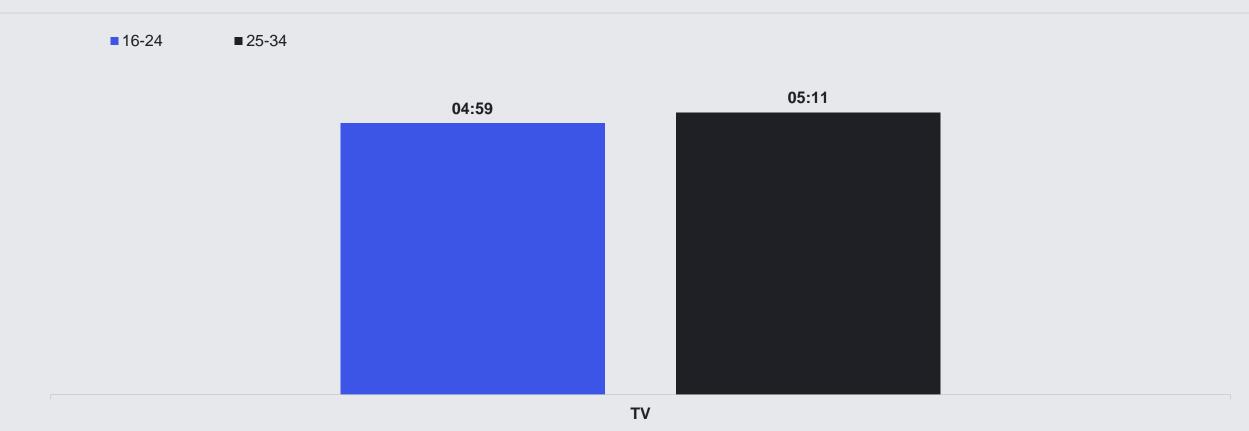
■ 15-24 ■ 25-34 ■ 25-34 with children





# Brazilian Millennials' Broadcast TV viewing increases as they get older

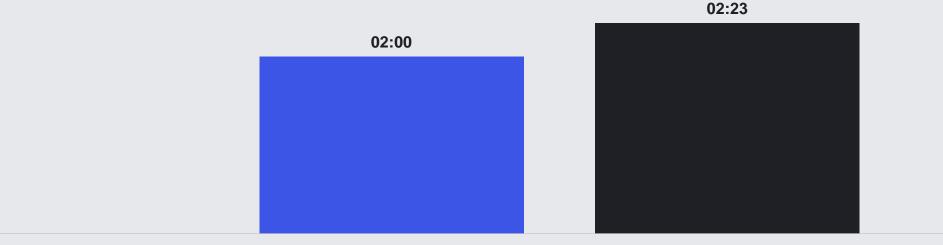
Average hours viewed per day



# Colombian Millennials' TV viewing increases as they get older

Average hours viewed per day

■ 18-24 ■ 25-39



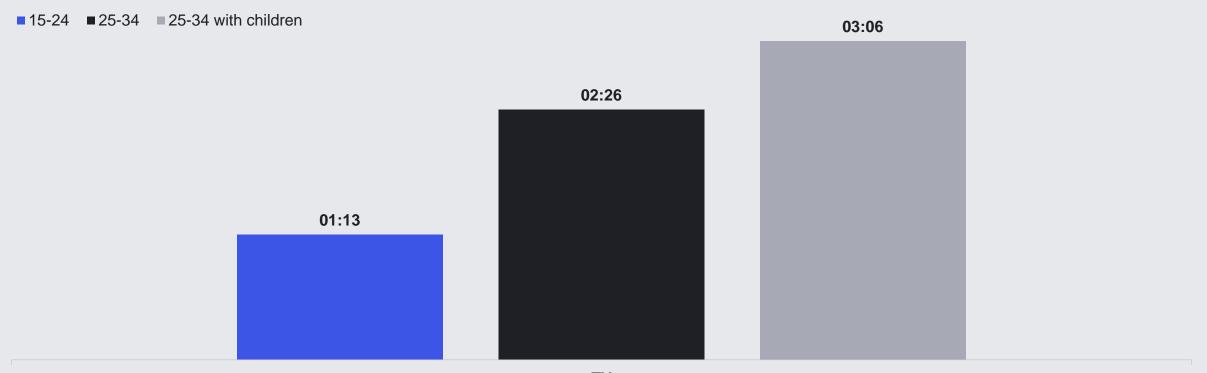
TOTAL TV



COLOMBIA

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

Average hours viewed per day

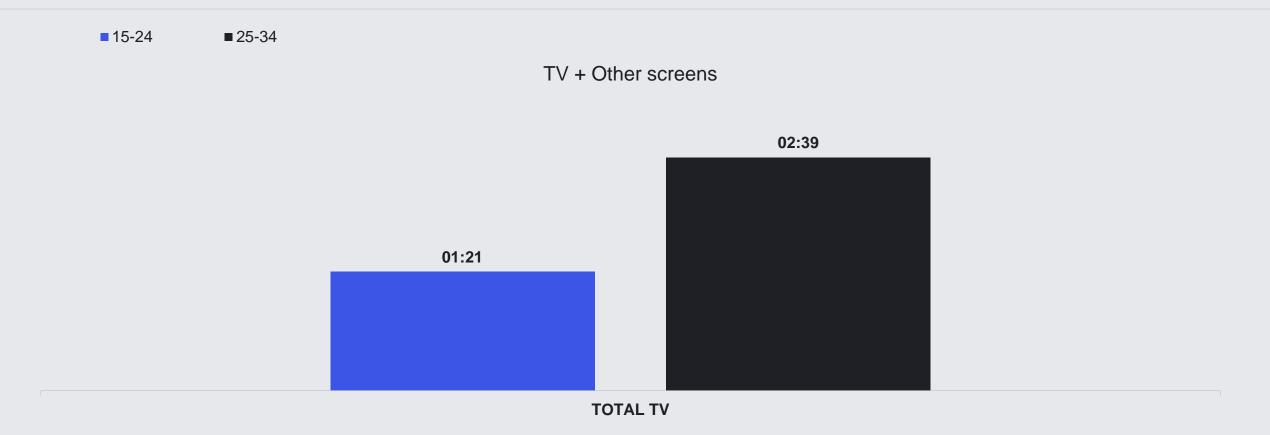




#### **CZECH REPUBLIC**

## **Finnish Millennials watch TV**

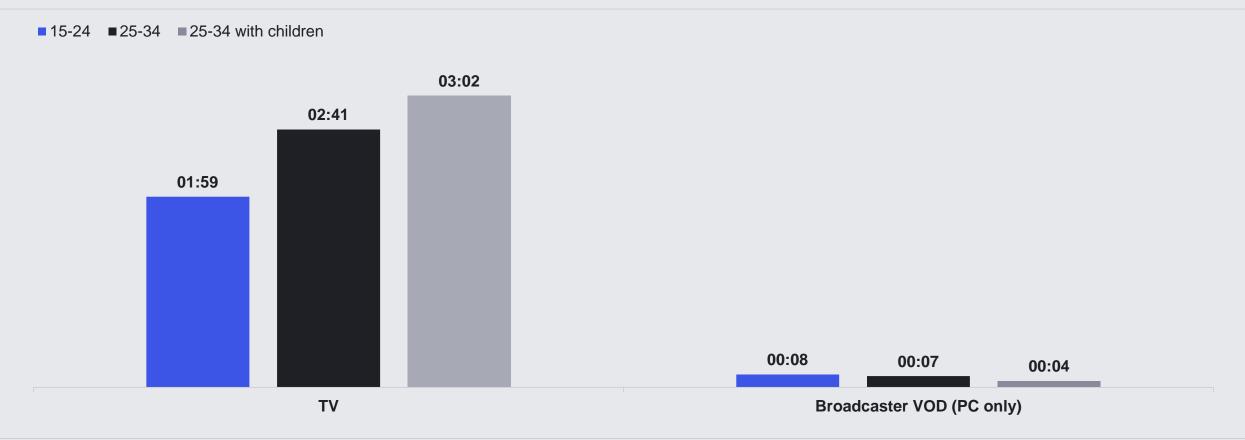
Average hours viewed per day





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

Average hours viewed per day





## Mexican Millennials' TV viewing increases as they get older

Average hours viewed per day

■16-24 ■25-34





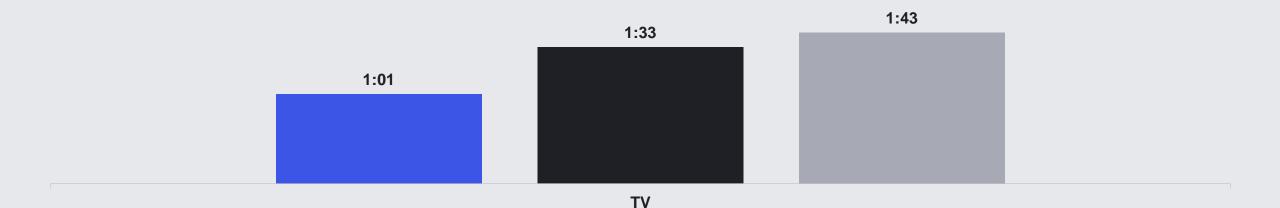
Source: Nielsen IBOPE Mexico. P4+, Jan - Dec 2017 Universe P 16-24: 9,328,950 - P 25-34: 7,897,620 Total TV (Free TV + Cable + VideoGame + DVD + OTT)

**MEXICO** 

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

Average hours viewed per day

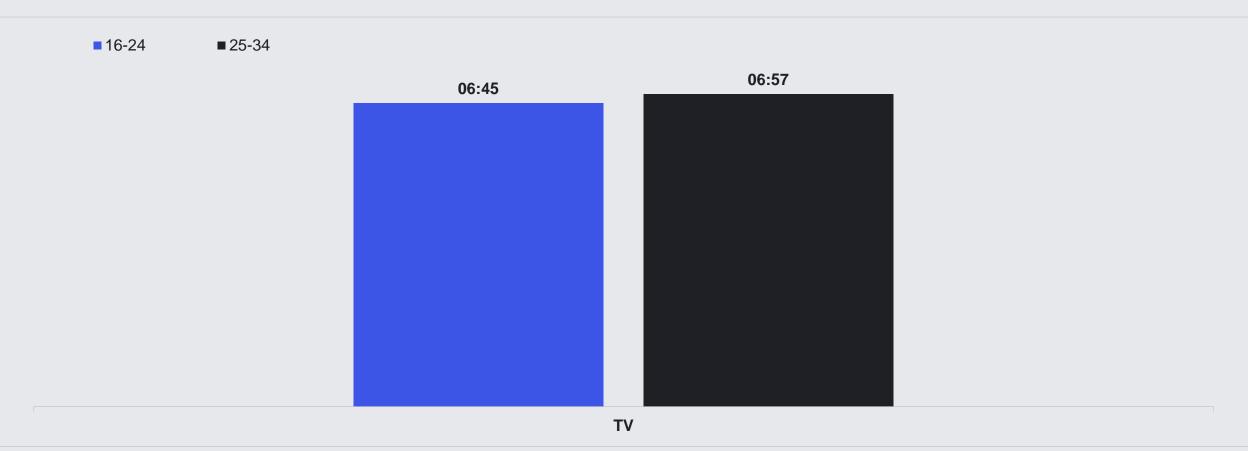
■ 13-19 ■ 20-25 ■ 20-34 with children



#### **NETHERLANDS**

# Peruvian Millennials' TV viewing increases as they get older

Average hours viewed per day

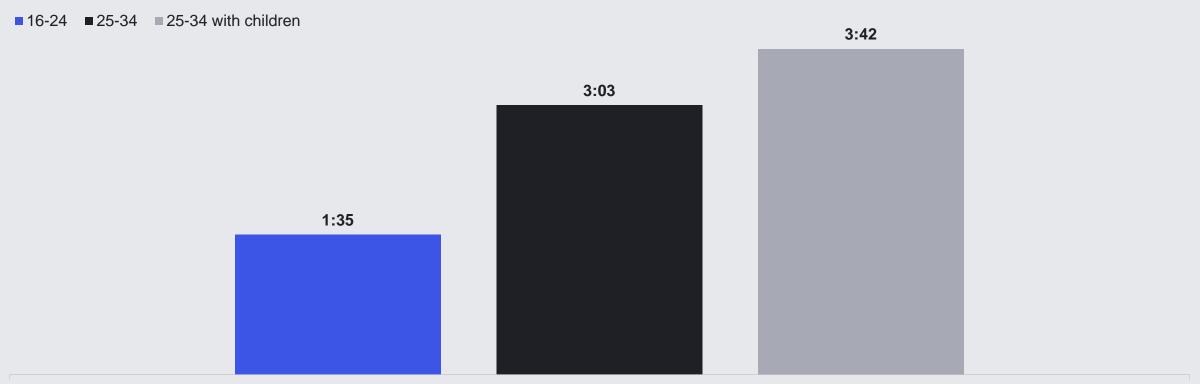




### PERÚ

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

Average hours viewed per day

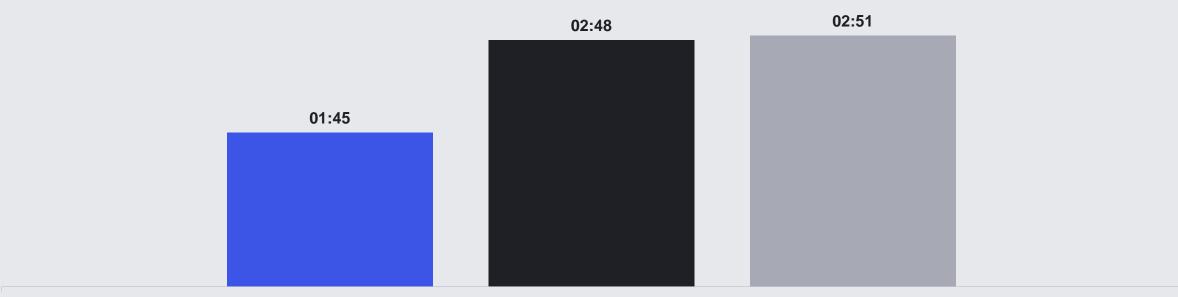




## Russian Millennials' TV viewing increases as they get older and have kids

Average hours viewed per day

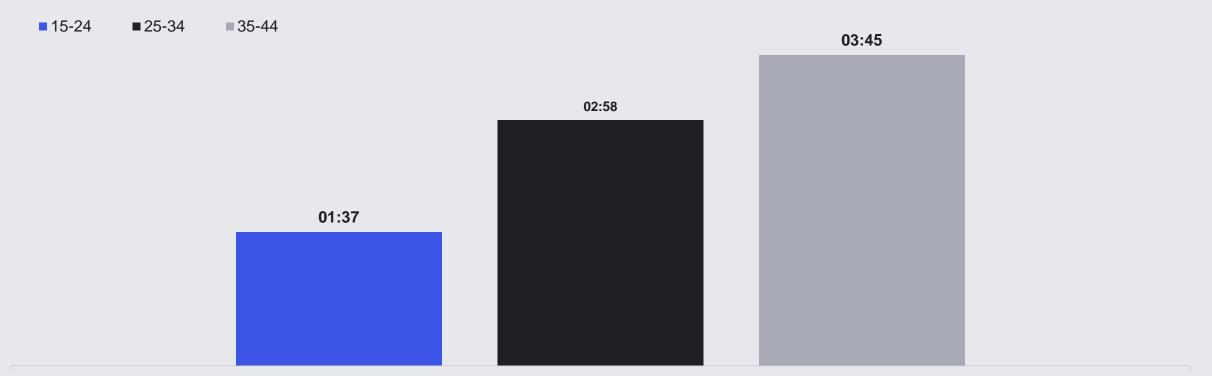
■ 15-24 ■ 25-34 ■ 25-34 with children





# Slovenian Millennials' TV viewing increases as they get older

Average hours viewed per day

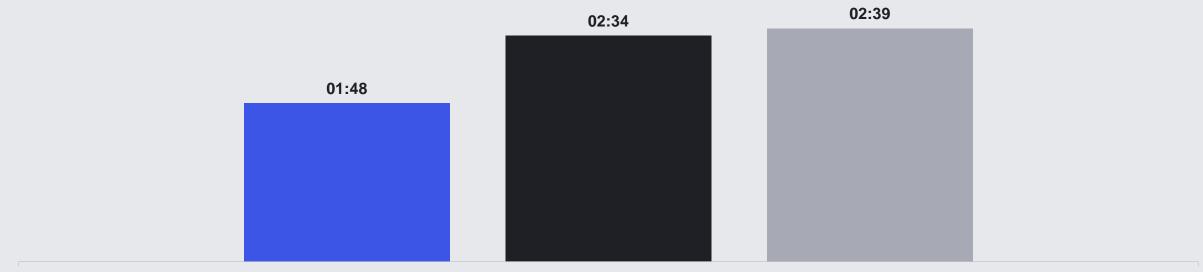




# Spanish Millennials' TV viewing increases as they get older and have kids

Average hours viewed per day

■ 15-24 ■ 25-34 ■ 25-34 with children



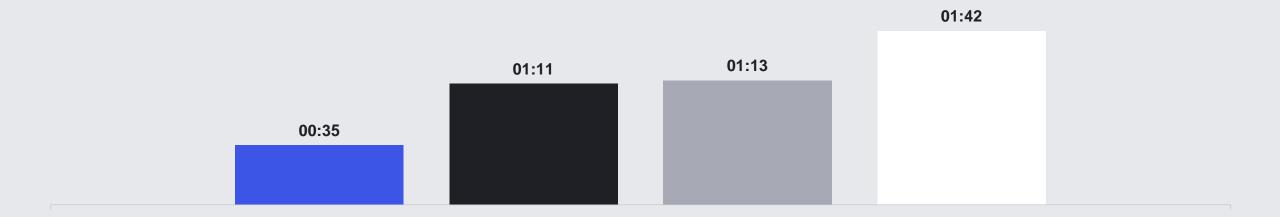
ΤV



## 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

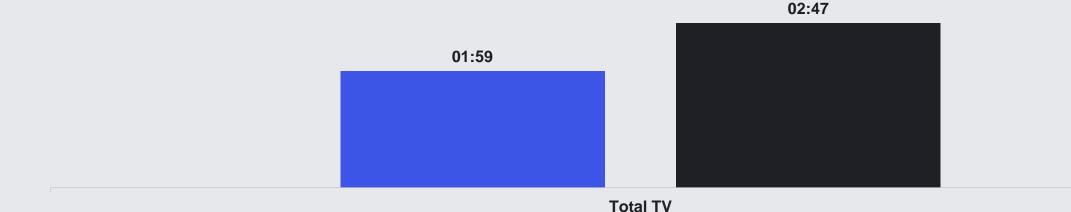




# Swiss Millennials' TV viewing increases as they get older

Average hours viewed per day

■15-24 ■25-34

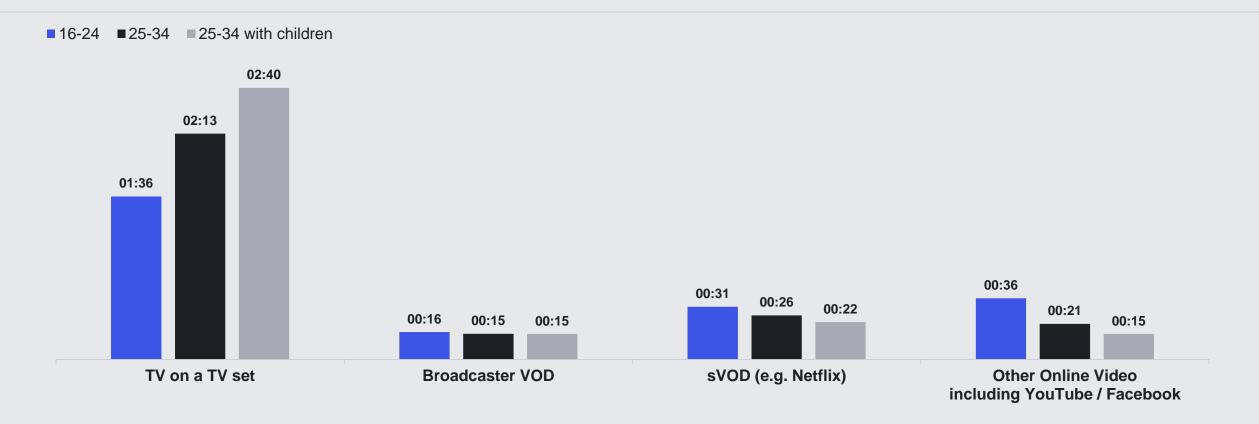




#### SWITZERLAND

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

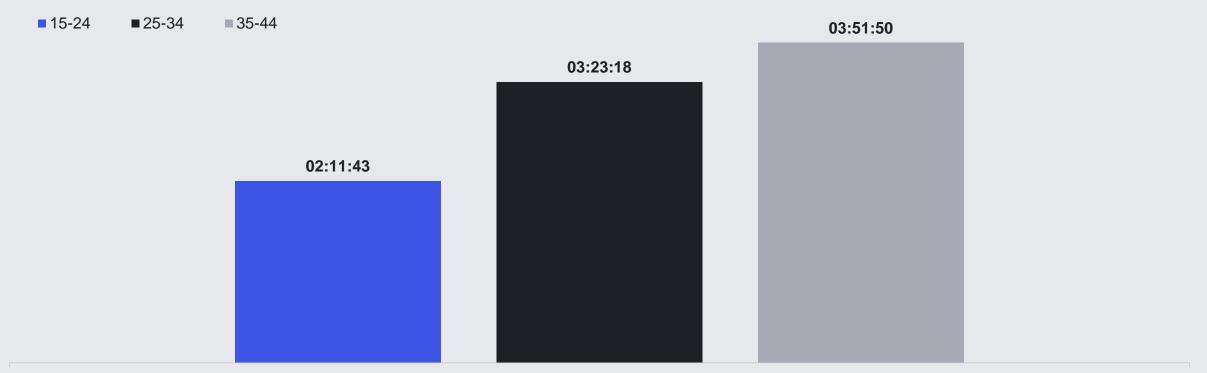
Average hours viewed per day





## Ukrainian Millennials' TV viewing increases as they get older

Average hours viewed per day



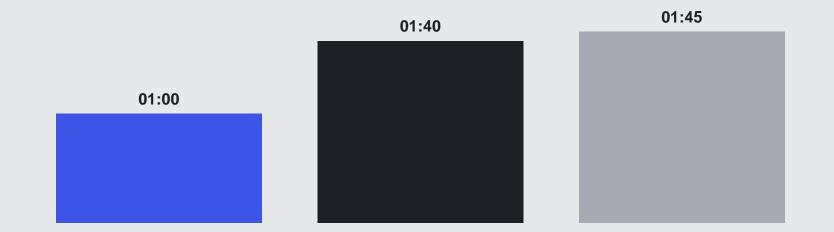
UKRAINE



## 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





Source: Nielsen R&F Time Period Report, Live +7, Q2 2018 through 6/26/18, "TV" reflects all ad-supported broadcast & cable TV (includes Hispanic).

### 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."

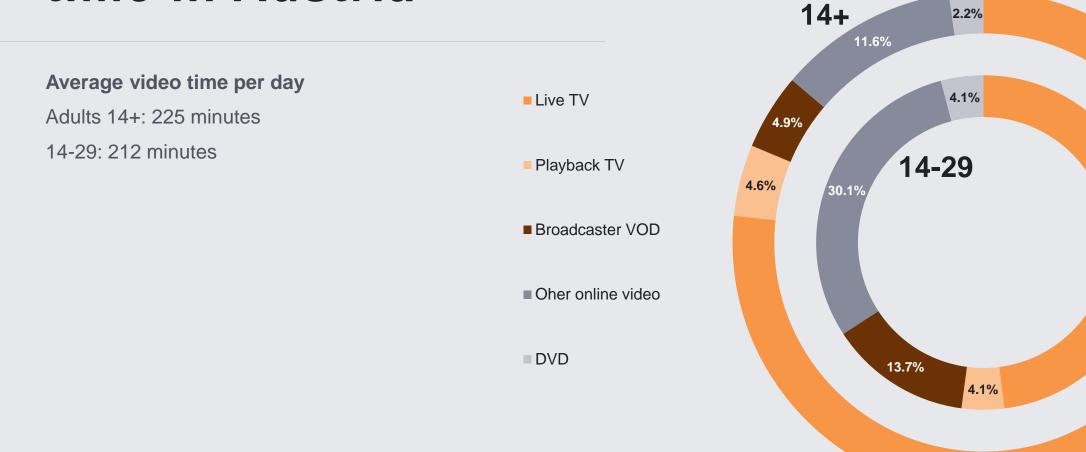
Andrew Clarke, CMO of Mars

February 2017



Source: http://www.campaignlive.com/article/exclusive-q-a-mars-cmo-andrew-clarke-transparency-faith-super-bowl-fighting-agencies/1422939#dkUSjhX7xwxTDtp4.99

## TV is 86% of video time in Austria





AUSTRIA

48.0%

76.7%

## TV is 88% of video time in Finland

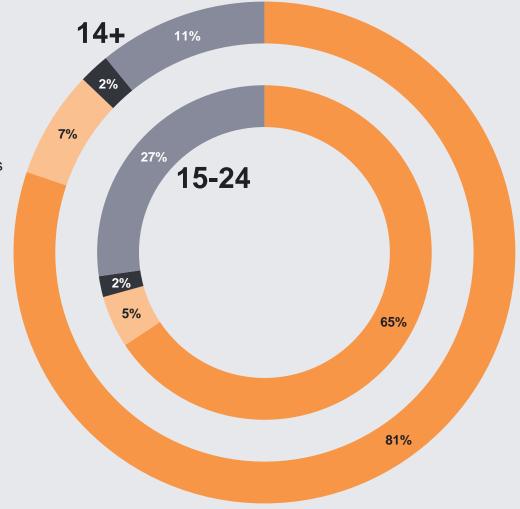
Average video time per day All individuals: 172 minutes

Live TV

Time-shifted viewing 1-7 days

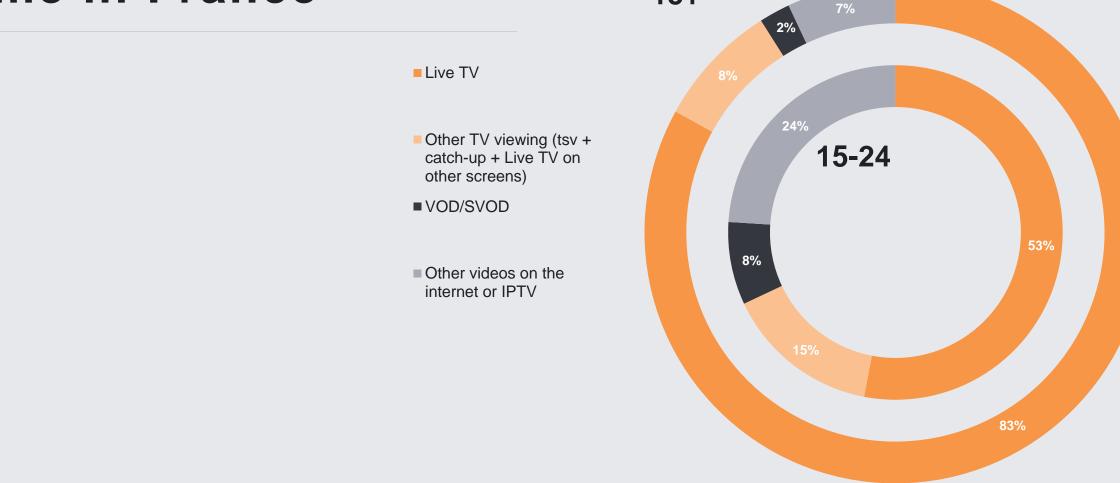
DVD / Blu-ray / VHS

Other TV screen use





## TV is 91% of video time in France



15+



Source : Médiamétrie – Estimations based on Médiamat panel data in 2017, Global TV april-june 2017. Internet Computer and Video Computer Médiamétrie/NetRatings. Internet mobile, Internet tablet in 2016.

FRANCE

## TV is 88% of video time in Germany

	6%	
TV classic	3%	3%
TV via alternative access	<sup>16%</sup> 14-3	4
■ Free online video		
■ Pay VoD	19%	53%
DVD/Blu-ray		
Cinema	8%	
		85%

14+

2%

4%

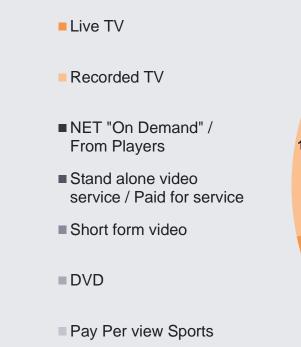


Source: ViewTime Report Q3/2017 – Q2/2018, SevenOne Media/forsa. Alternative TV usage: Usage of linear TV program via internet stream, TV card or DVB-T on laptop, PC, smartphone or tablet; Base: A 14+, n=7,515

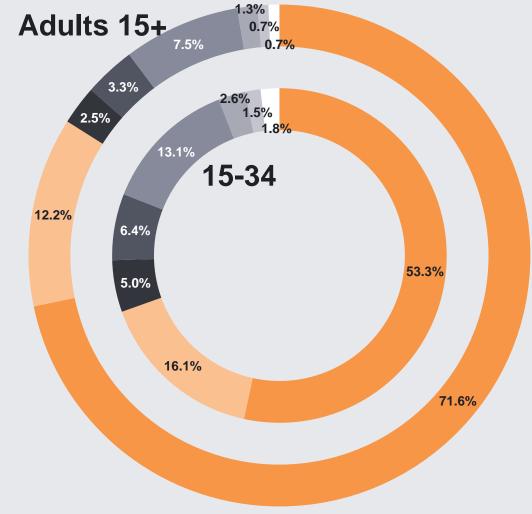
GERMANY

## TV is 84% of video time in Ireland

Average video time per day Adults 15+: 221 minutes 15-34: 212 minutes



Other Internet



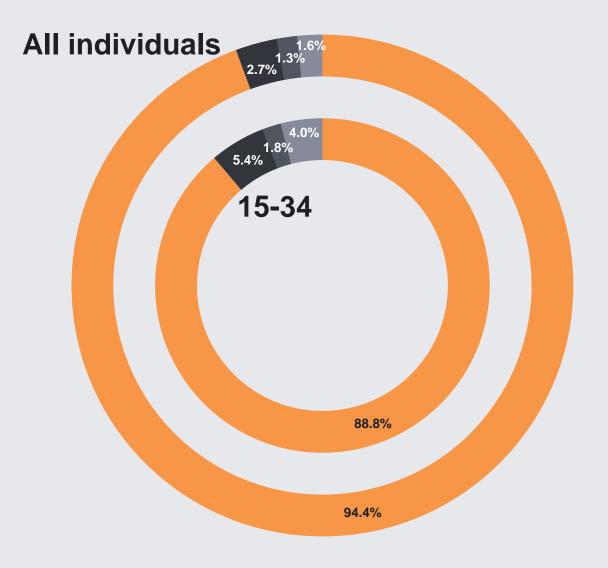


IRELAND

### TV is 94% of video time in Italy

Average video time per day All individuals: 292 minutes 15-34: 180 minutes

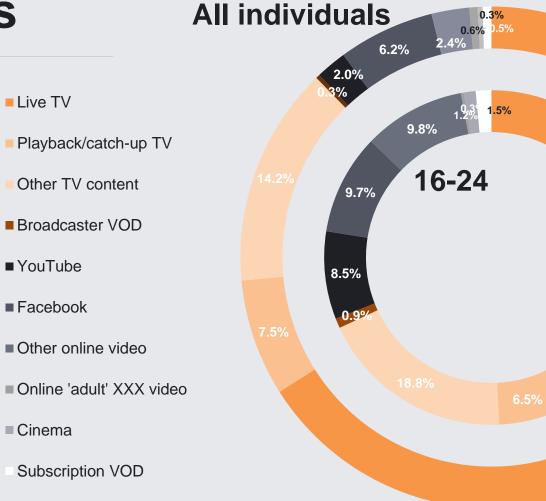




**TV Group** 

## TV is 88% of video time in the Netherlands

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





42.7%

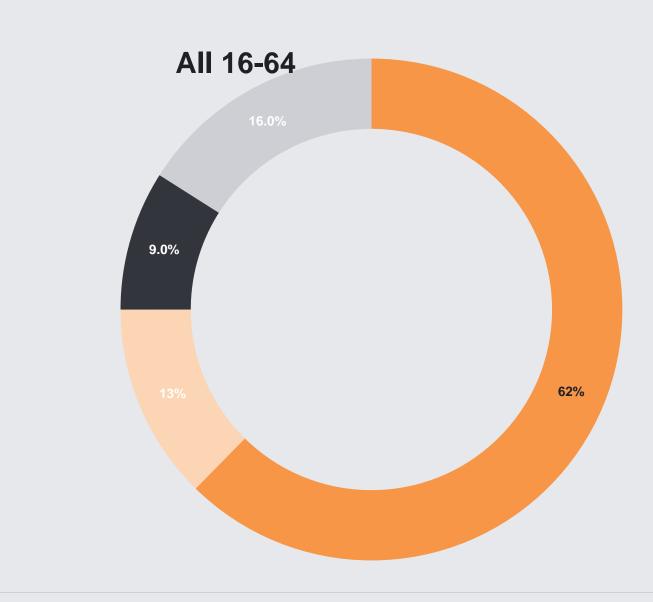
66.0%



## TV is 75% of video time in Poland

Average video time per day

All 16-64 = 229 mins





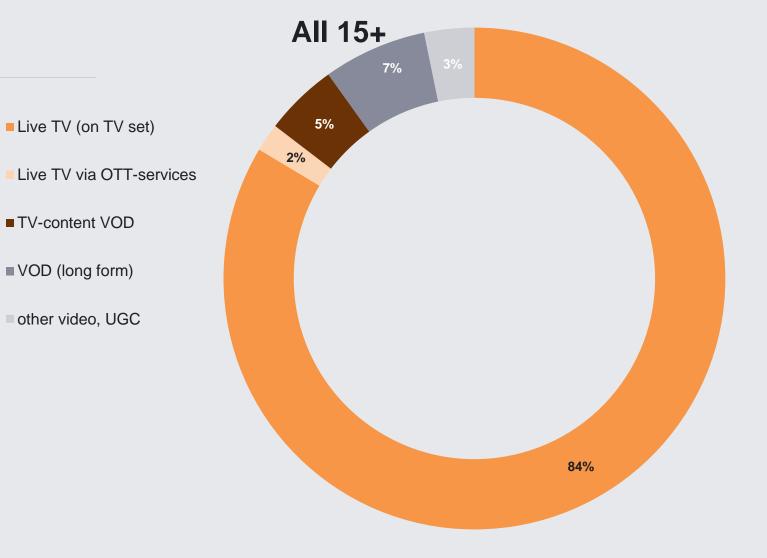
Live TV

■ SVOD

YouTube

TSV+BVOD

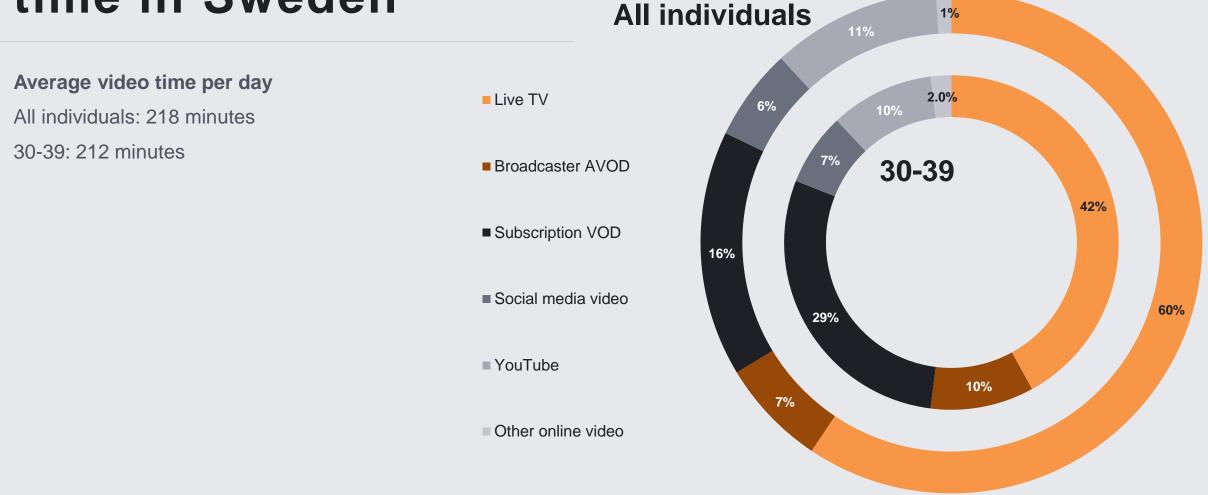
### TV is 91% of video time in Russia





RUSSIA

## TV is 67% of video time in Sweden



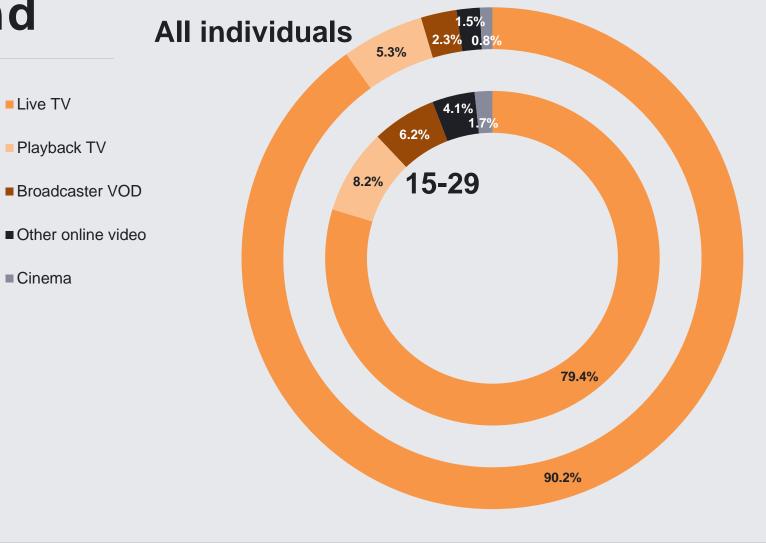


Source: MMS, Trend&Tema 2018:1. All individuals = 9 to 99 years old. Avod=SvT Play, TV4 play, Viafree, Dplay. Svod=Netflix, Viaplay, C more, HBO Nordic. Other online video= Barnkanalen, Dreamfilm, AB TV, Telia Play+, Piratebay. Social media video= Facebook, Twitter, Instagram, Snapchat etc

SWEDEN

## TV is 97% of video time in Switzerland

Average video time per day All individuals: 132 minutes 15-29: 97 minutes

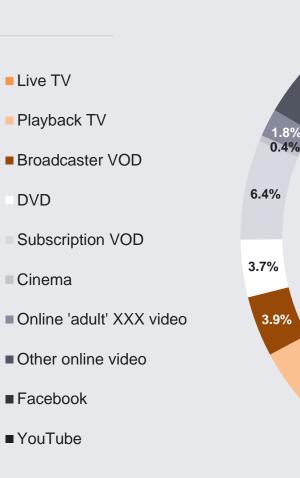


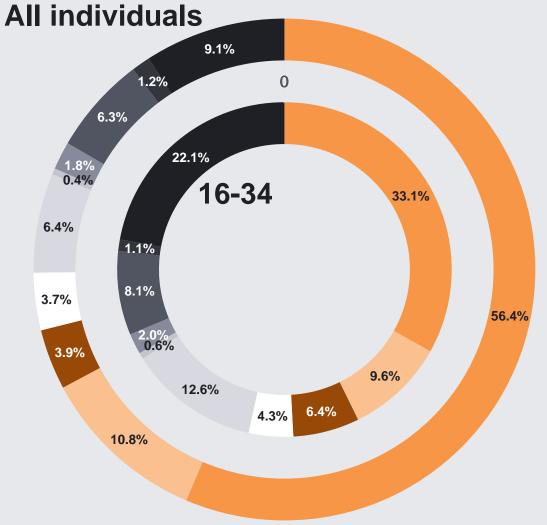


#### SWITZERLAND

## TV is 71% of video time in the UK

Average video time per day All individuals: 279 minutes 16-34: 259 minutes



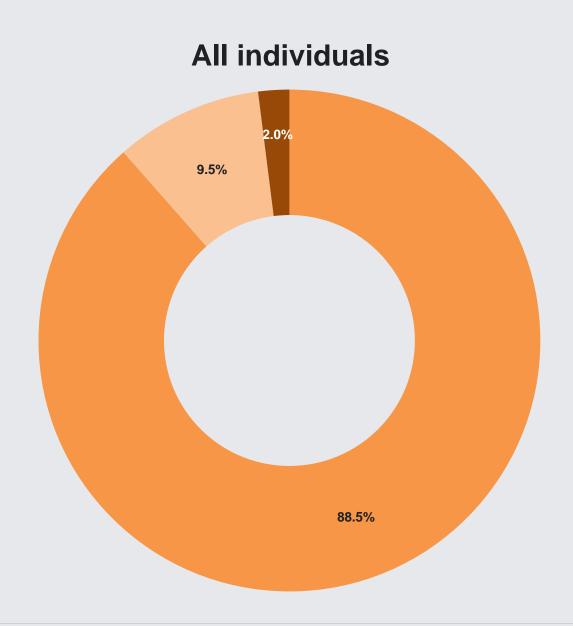




On top of being the world's favourite form of video, the majority of TV viewing is live



## In Australia, 89% of TV is watched live





Source: OzTAM Metro and Regional Data. Total TV. 0200-2600. Jan 2017 to Dec 2017. % of Playback viewing Includes live viewing and playback through the TV set at the time it is watched within 28 days. Time bands use the industry standard 26-hour TV clock: 0200-2600

Live

Playback within 7 days

Playback within 8-28 days

#### AUSTRALIA

## In Austria, 99% of TV is watched live

Individuals 14+ 99.0%

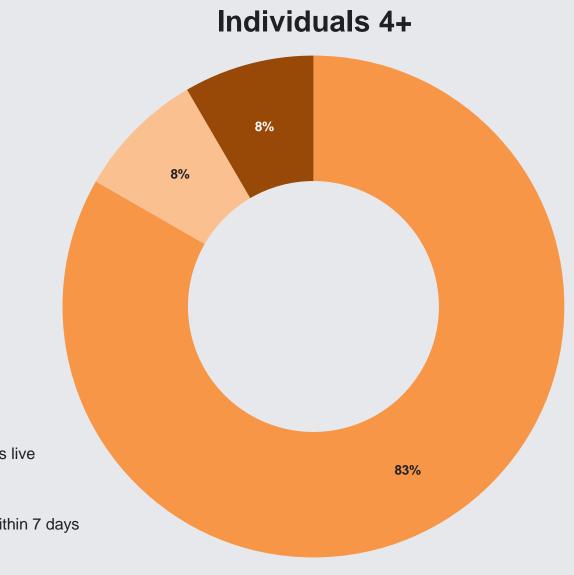
Live

 Viewed on the same day as live (VOSDAL)

Timeshifted viewing withing 7 days



## In Belgium North, 83% of TV is watched live



Live

 Viewed on same day as live (VOSDAL)

Time-shifted viewing within 7 days

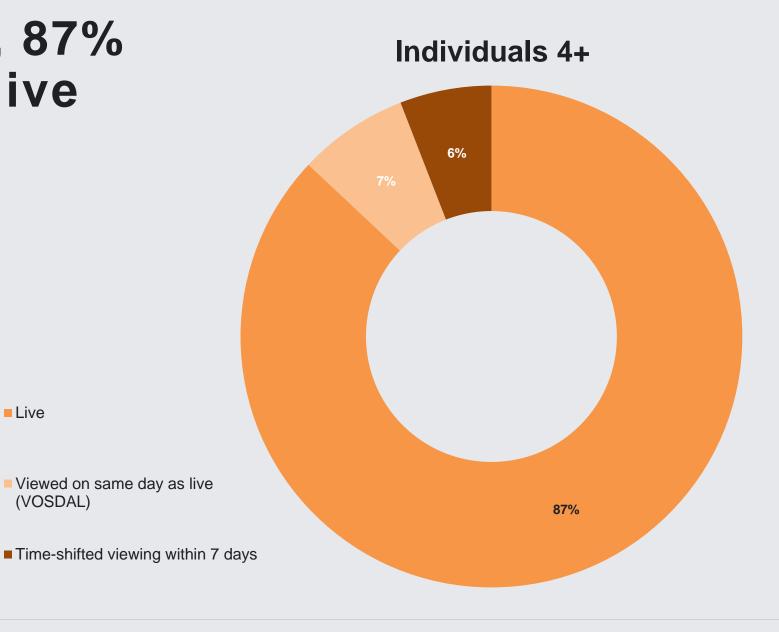


#### **BELGIUM NORTH**

### In Belgium South, 87% of TV is watched live

Live

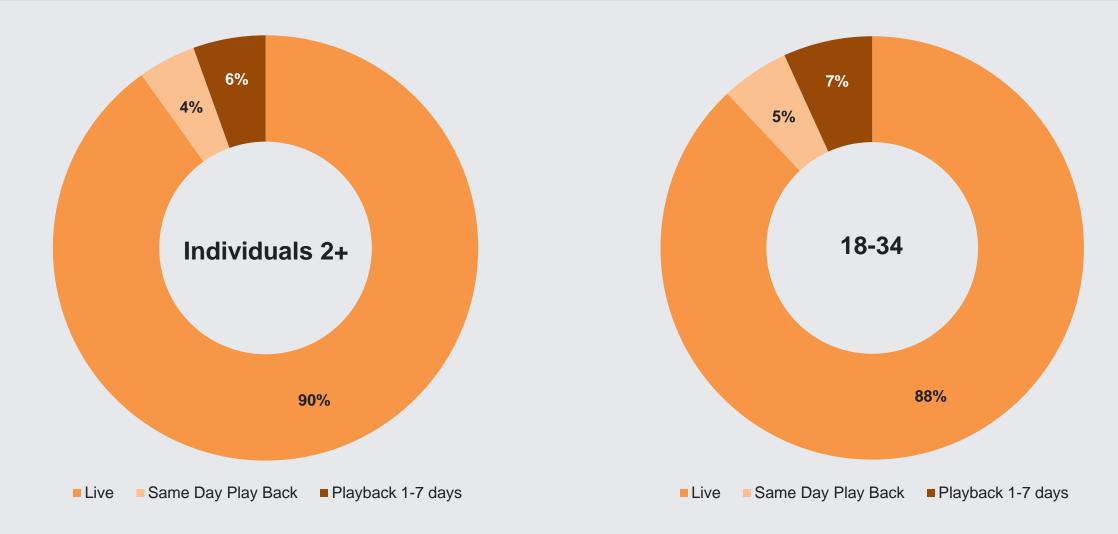
(VOSDAL)





#### **BELGIUM SOUTH**

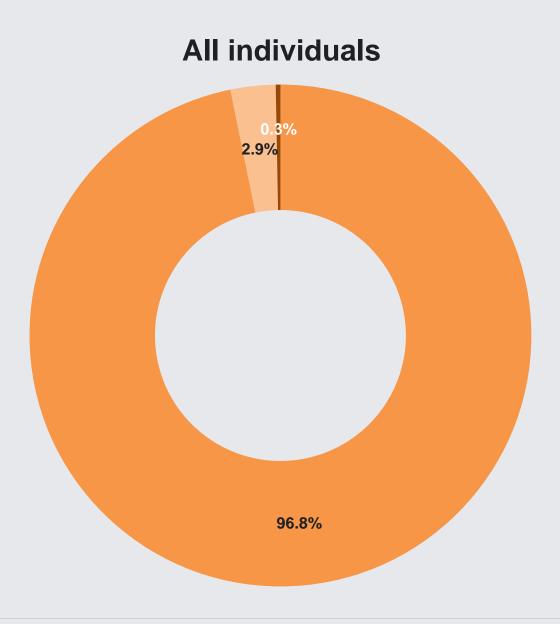
### In Canada, 90% of TV is watched live





#### CANADA

## In Czech Republic, 97% of TV is watched live



The Global TV Group

Source: y2017, ATO - Nielsen Admosphere, TV live + TS0-7; Target group 4+

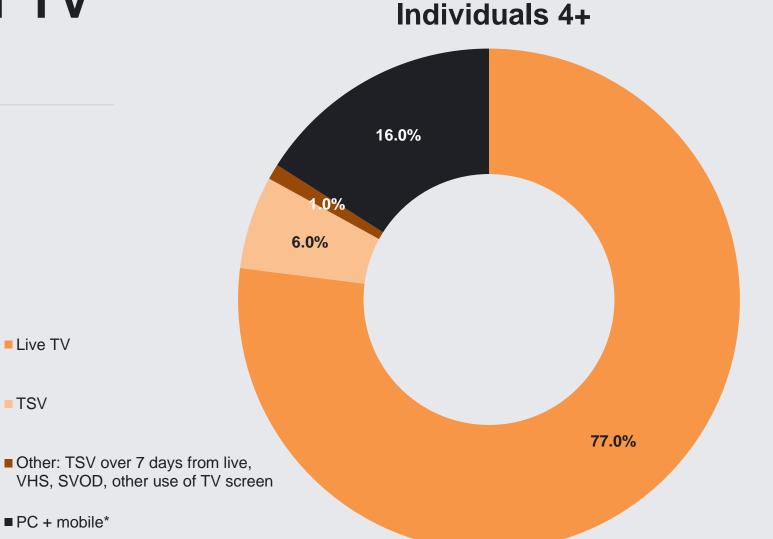
Live

Playback within 0-3 days

Playback within 4-7 days

#### CZECH REPUBLIC

### In Finland, 77% of TV is watched live

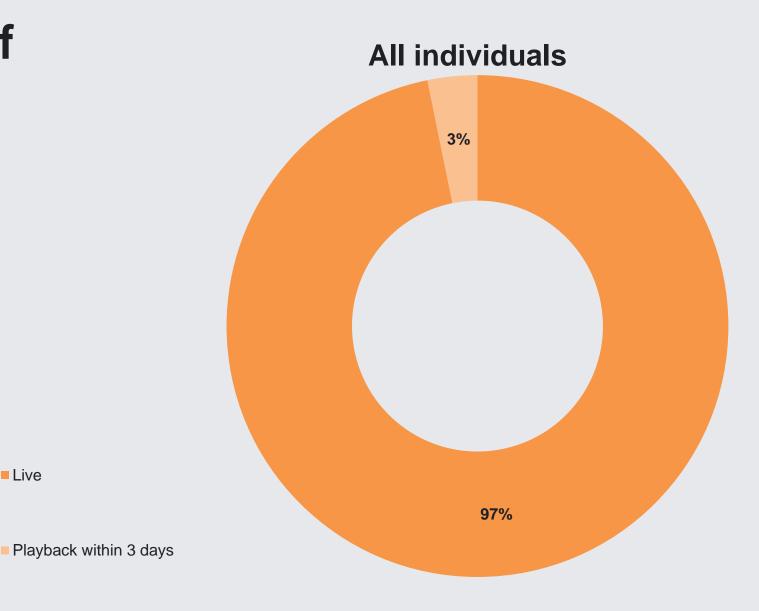




Live TV

TSV

### In Germany, 97% of TV is watched live





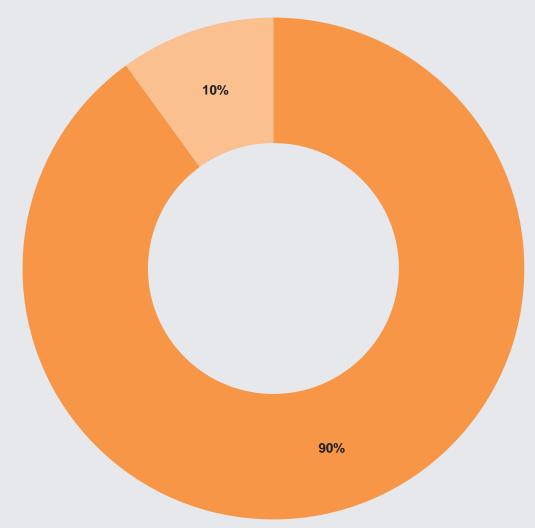
Source: AGF in collaboration with GfK; Videoscope 1.1, Total TV, ø Jan-May 2018; data weighted. Base: Adults 14+ years.

Live

GERMANY

## In Ireland, 90% of TV is watched live

#### All individuals





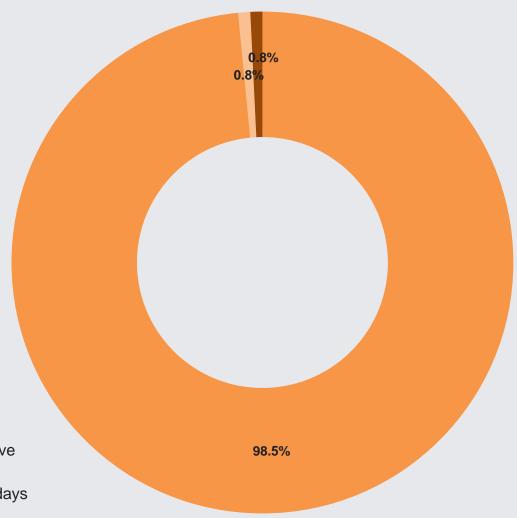
Live TV

Non-Live

#### IRELAND

# In Italy, 99% of TV is watched live

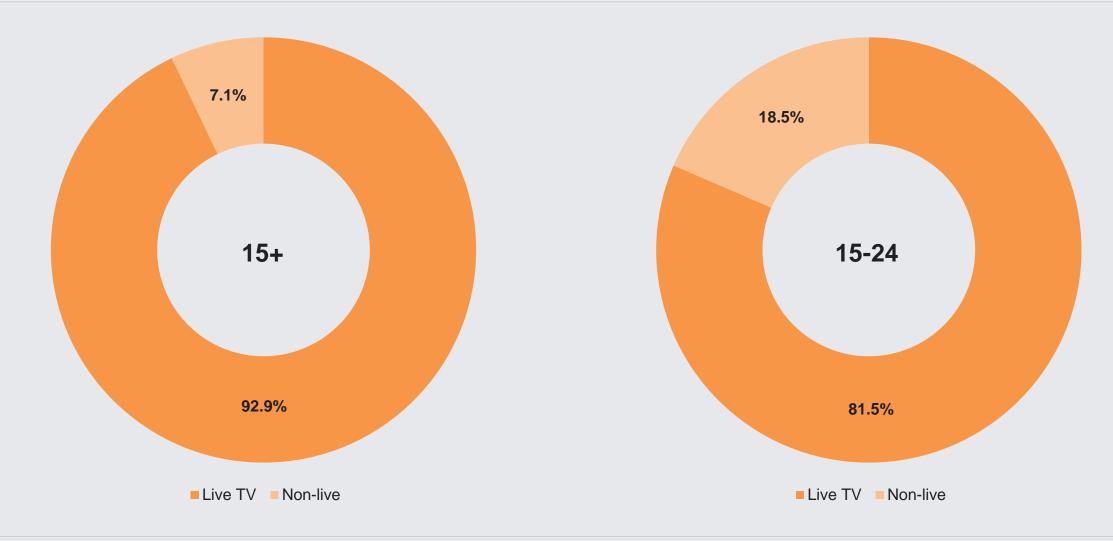
Individuals 4+



Live

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

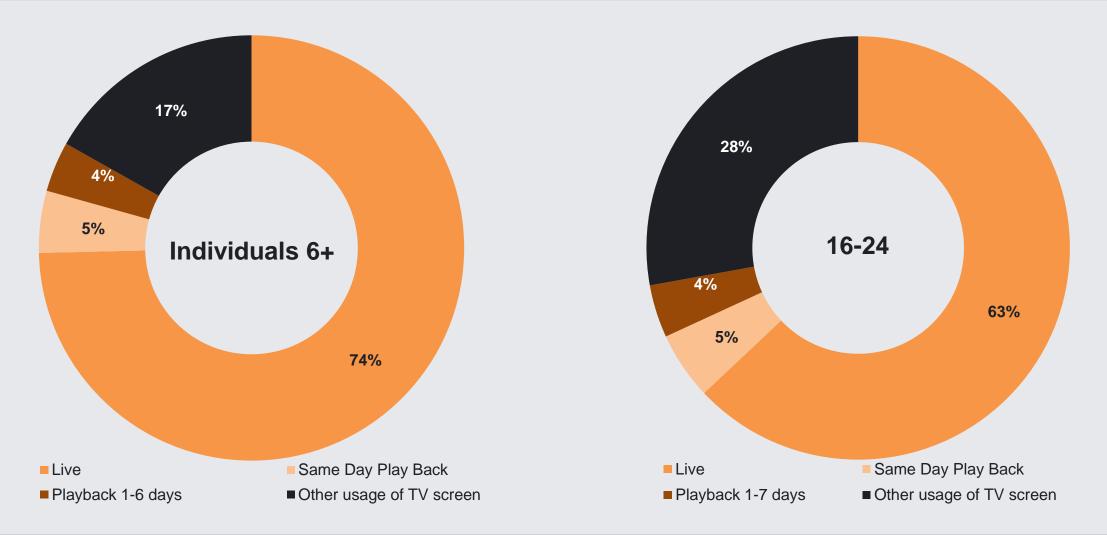
### In France, 93% of TV is watched live





#### FRANCE

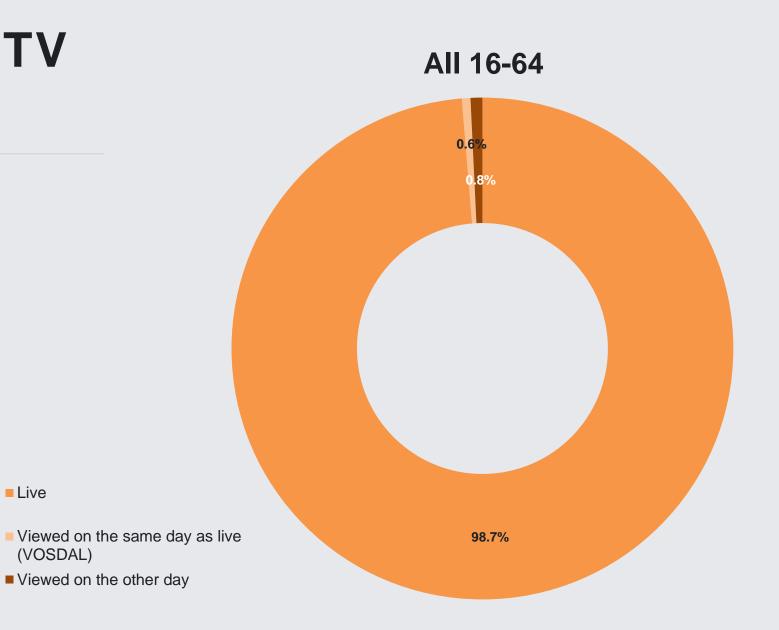
### In the Netherlands, 74% of TV is watched live





#### **NETHERLANDS**

### In Poland, 99% of TV is watched live





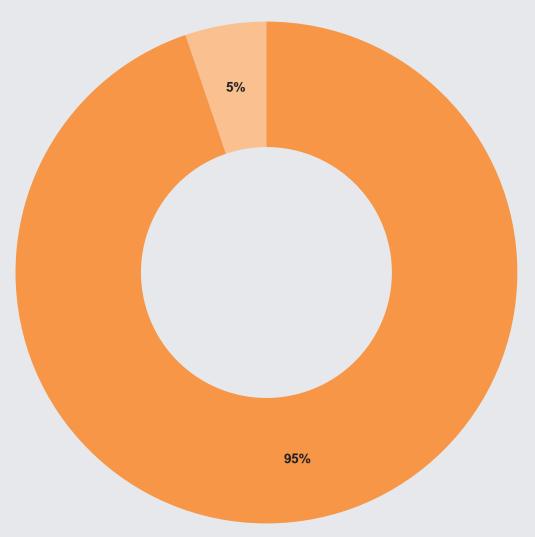
Live

(VOSDAL)

#### POLAND

## In Russia, 95% of TV is watched live

All individuals 15+





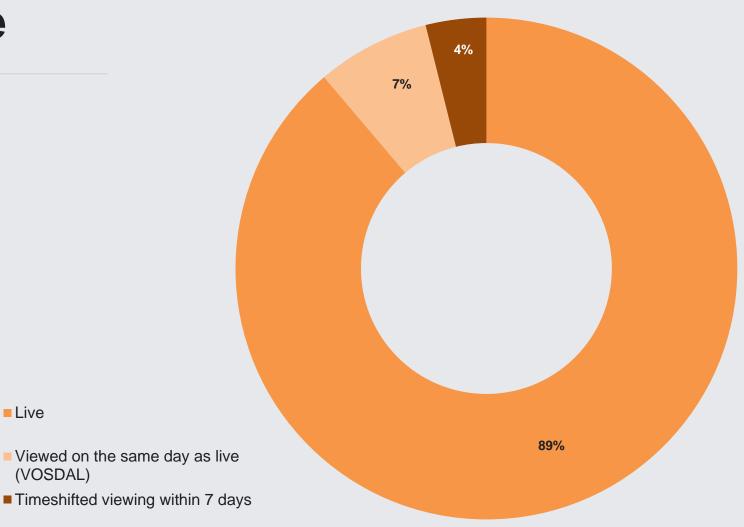
Live

catch up, VOD

RUSSIA

### In Slovenia, 89% of **TV** is watched live

**Individuals 4+** 



#### The 💽 Global ⊆ TV Group

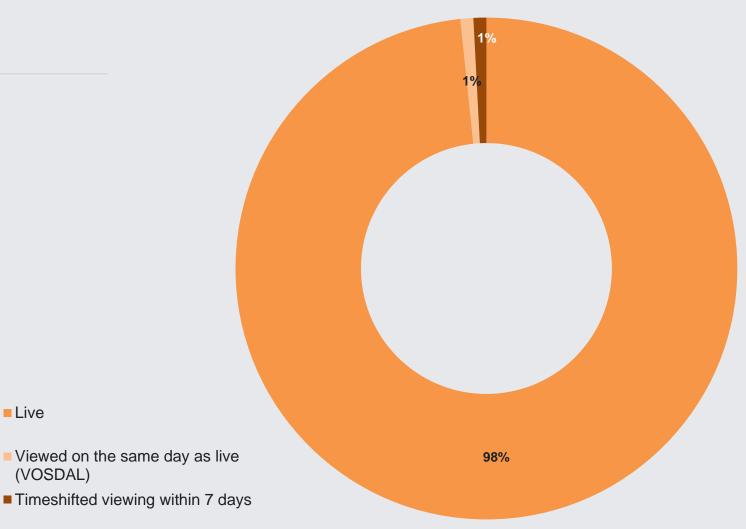
Live

(VOSDAL)

#### **SLOVENIA**

### In Korea, 98% of TV is watched live

Individuals 4+



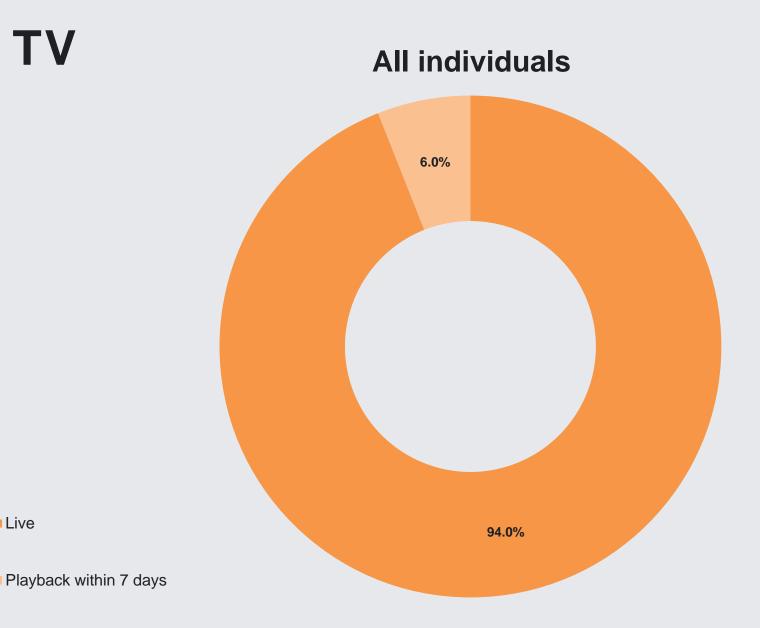


Live

(VOSDAL)

#### SOUTH KOREA

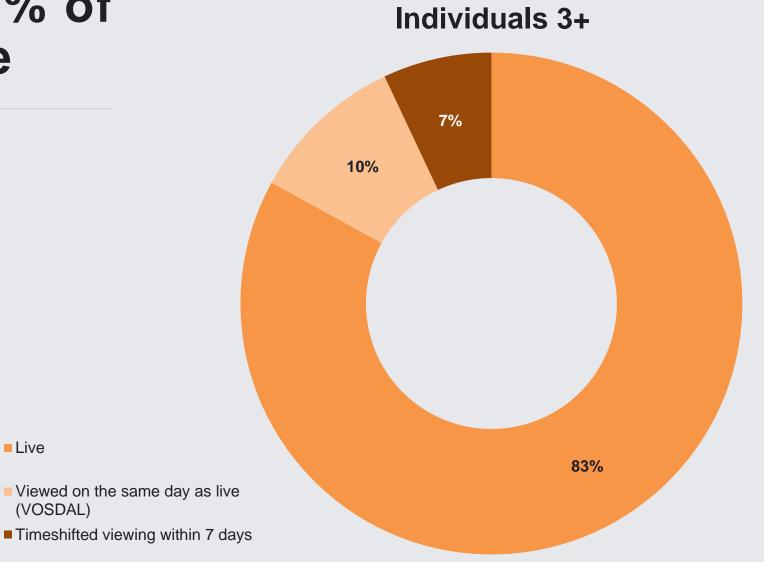
### In Sweden, 94% of TV is watched live





Live

### In Switzerland, 83% of **TV** is watched live



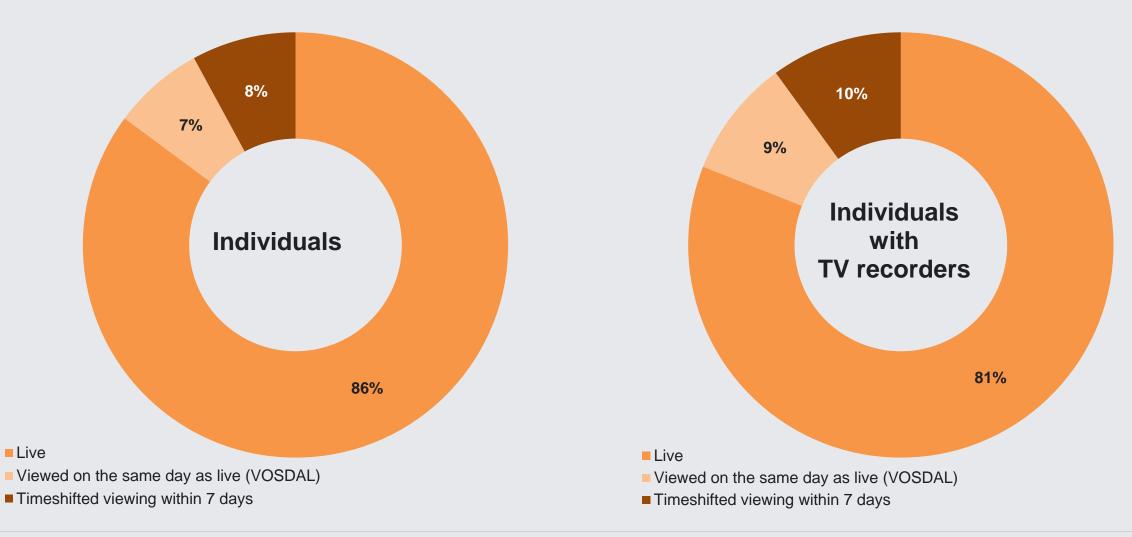


Source: Mediapulse TV-Panel (Instar Analytics), German Switzerland, TG Individuals 3+ incl. guests, 01.01.2017 – 31.12.2017, Mo-Su 24h, all platforms, Overnight +7, CH-Signal, viewing time.

Live

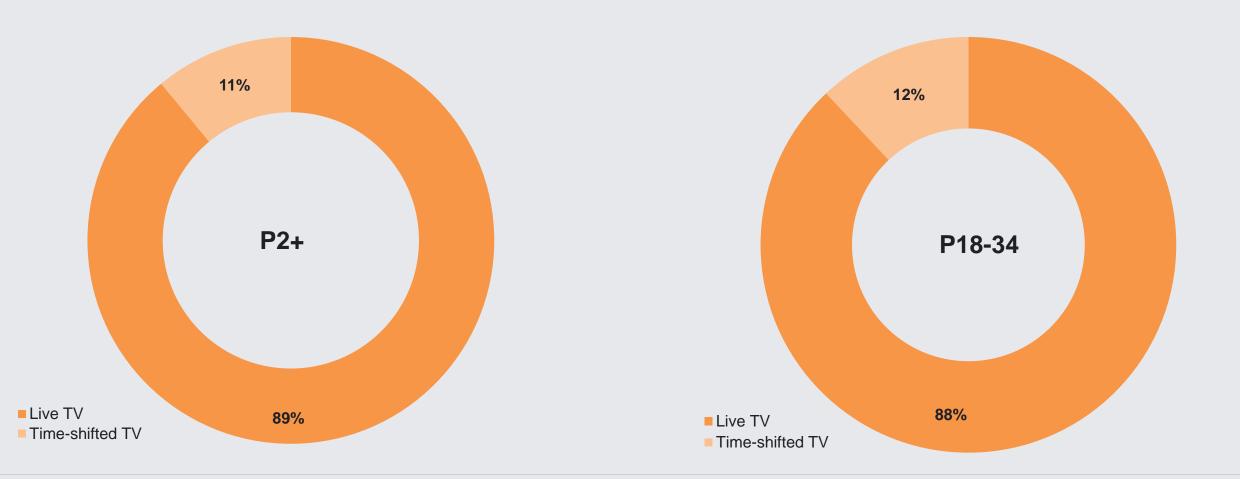
#### SWITZERLAND

### In the UK, 86% of TV is watched live





#### In the US, 89% of TV is watched live





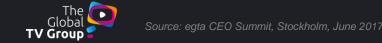
### Impact

TV is the most trusted and impactful form of advertising

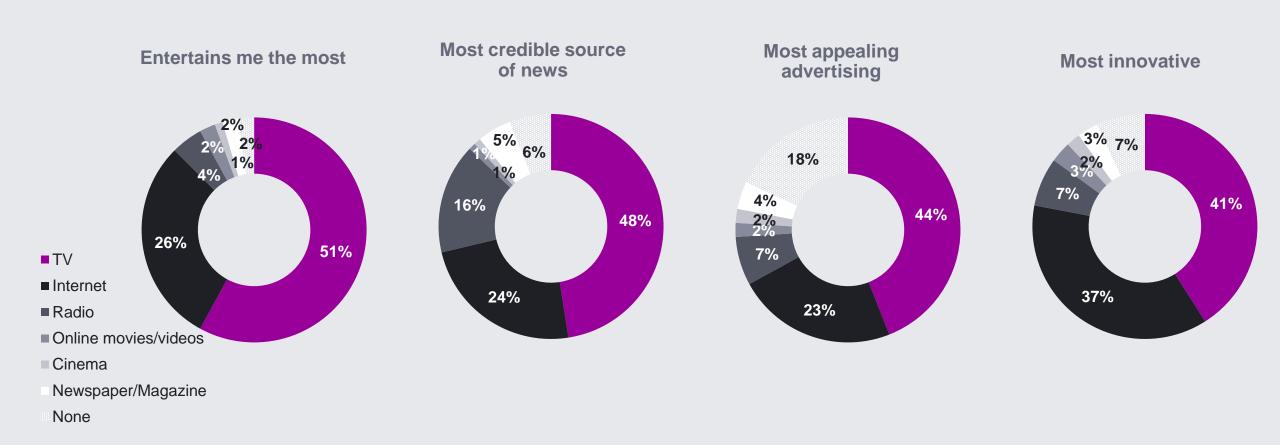


#### "A lot of our campaign recall comes from TV and not from Digital. When ads on Facebook just flow by, with TV ads we're really able to tell our story."

**Per Carleo**, Marketing Director Sweden of Volvo *June 2017* 

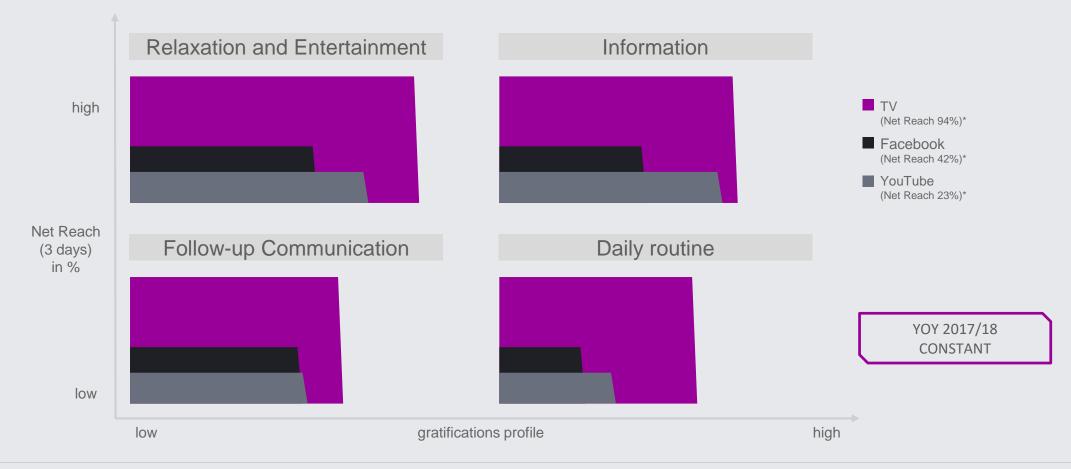


## TV is the preferred media across various characteristics





## TV is the preferred media across various gratification criteria



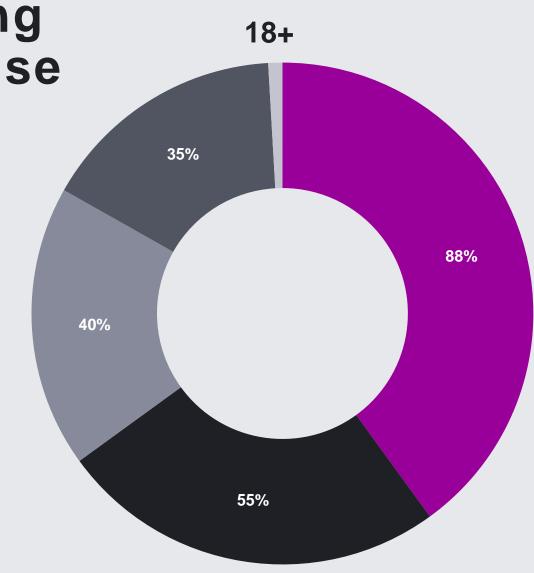


Source: IP Deutschland 2018; Gratification with video III; Base: TV: n = 2,485 | Facebook: n = 1,765 | YouTube: n = 2,360 | Question: How much do you agree with the following statements?; \* Source: IP Fourscreen Touchpoints 2017 | Base: Adults 14-59 years (Net Reach (3 days), in %)

#### GERMANY

## Consumers prefer watching content on TV above all else

% of preferred device to watch TV content





Source : YouGov/SNPTV « Media behavior» Nov, 2017. Base : 1 007 individuals representative of the national French population, aged 18 and more. Q. «What are the devices you used, even just once, to watch TV? – multiple answers possible»

■ TV

Laptop

Tablet

Smartphone

Smartwatch

## Consumers prefer watching content on TV above all else

35% 47% TV ■ Mobile 10% ■ PC 8% No difference

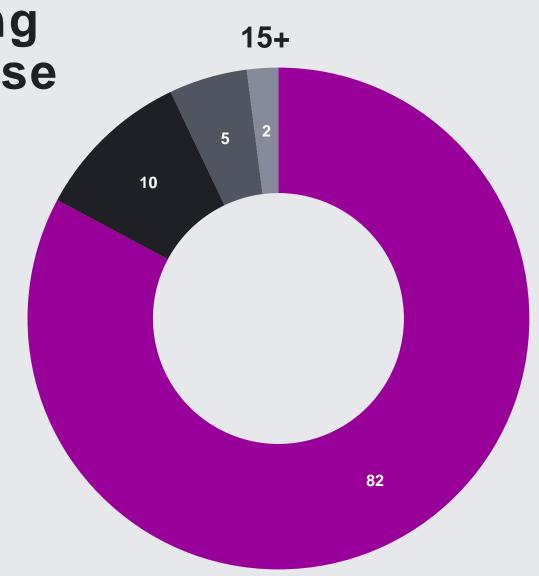
Q: Which media do you prefer the most?



#### SOUTH KOREA

# Consumers prefer watching content on TV above all else

Index of preferred device for using TV content or video





■ TV

Laptop

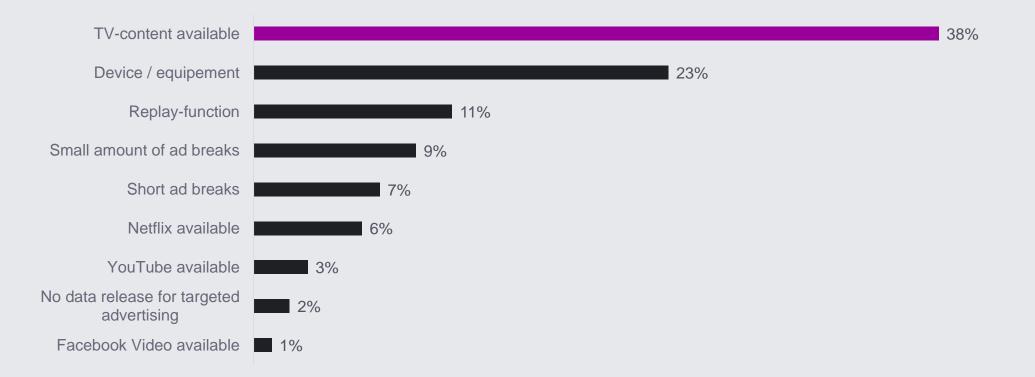
■ Tablet

Mobile

#### SWITZERLAND

### **Consumers prefer TV content above all else**

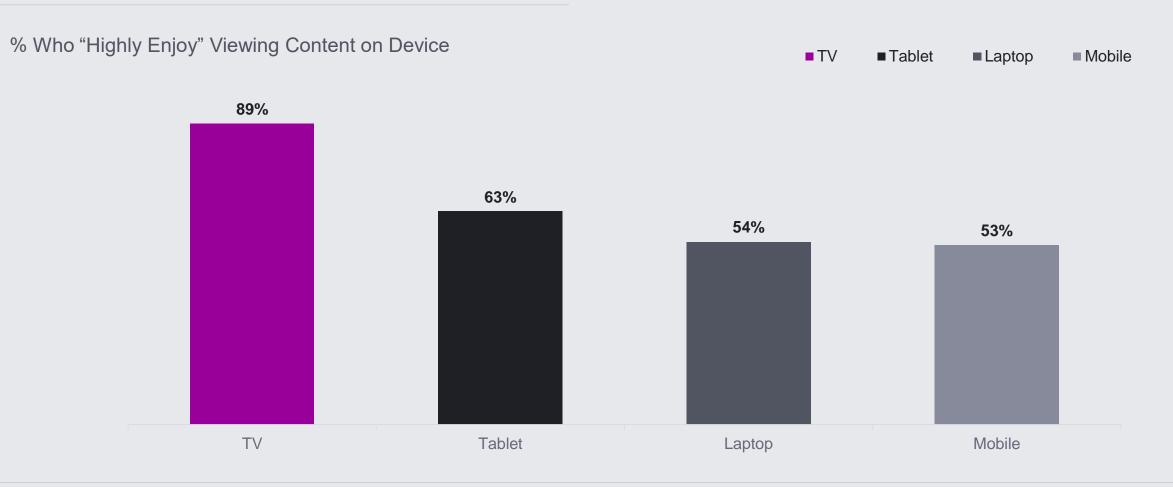
What influences the use of video? Respondents had to choose between different packages varying content, device, presence of advertising, duration of the ad break etc. When TV content was available in package, the package was chosen more often.





Source: Screenforce Switzerland: Studie "Bewegtbild Packages 2018", conjoint analysis / video packages, persons 15-74, n = 1'999. See methodology details in the note section below.

SWITZERLAND

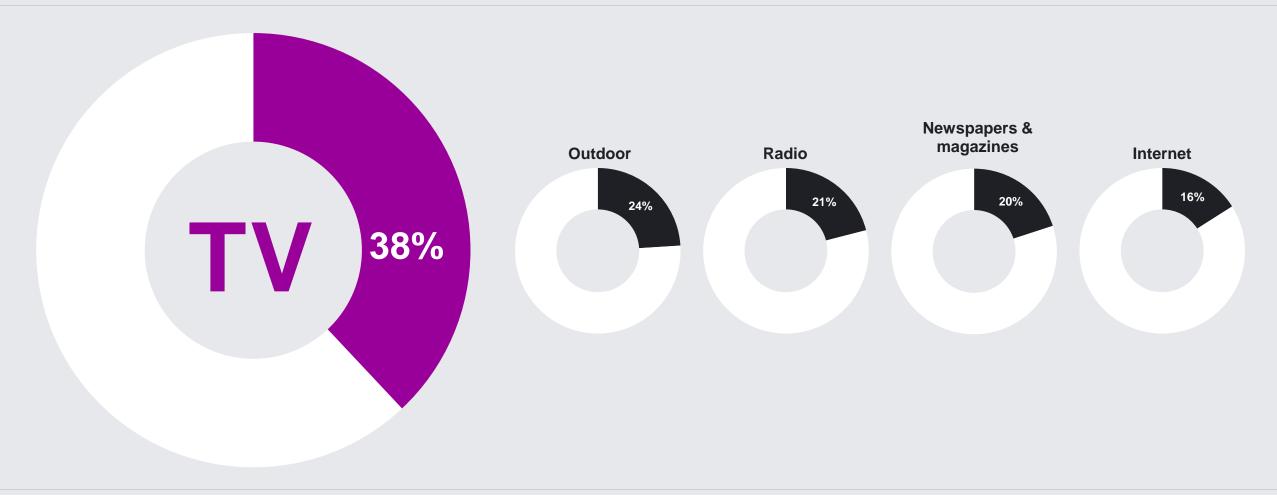




Source: CRE and Hub Research custom study "New study finds that TV outperforms Digital platforms in viewer ad attention & recall" 6/26/16

**Consumers prefer watching** 

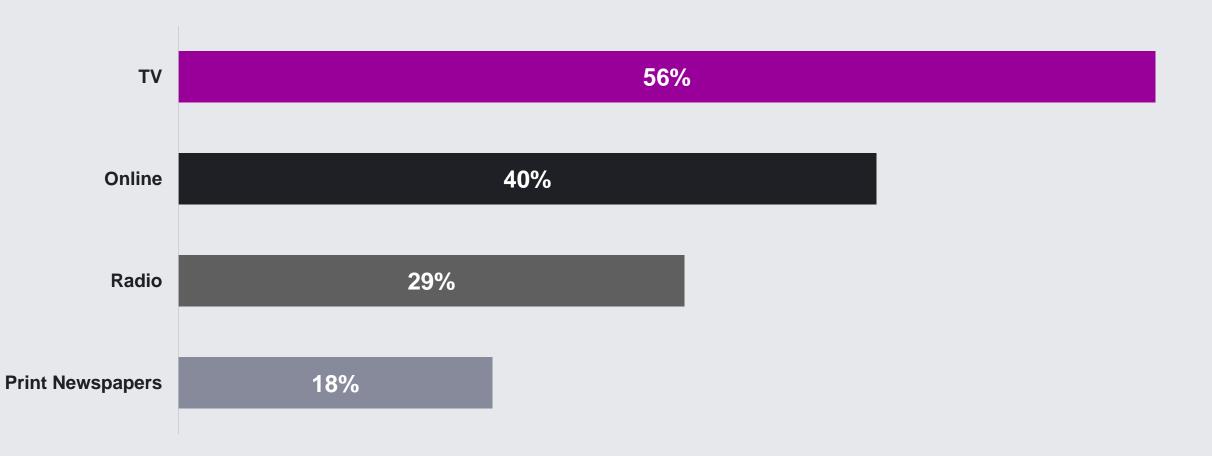
content on TV above all else





Source: GFK TSSP (September 2016 – July 2017). Sample: 12.000 Adults +14 y.o. "Do you think that these kinds of advertisements are useful for you? Do they give you useful information?"

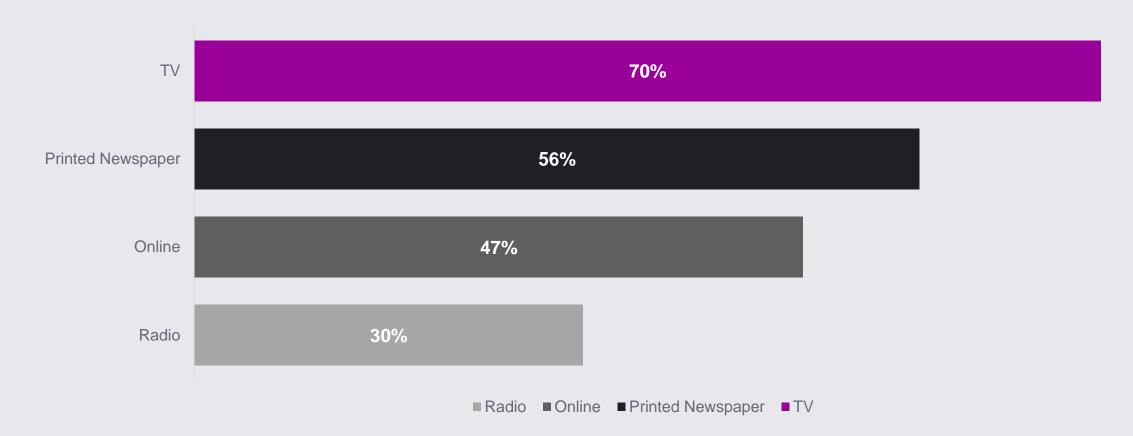
% of adults who search for news on each platform daily or several times a week





CZECH REPUBLIC

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

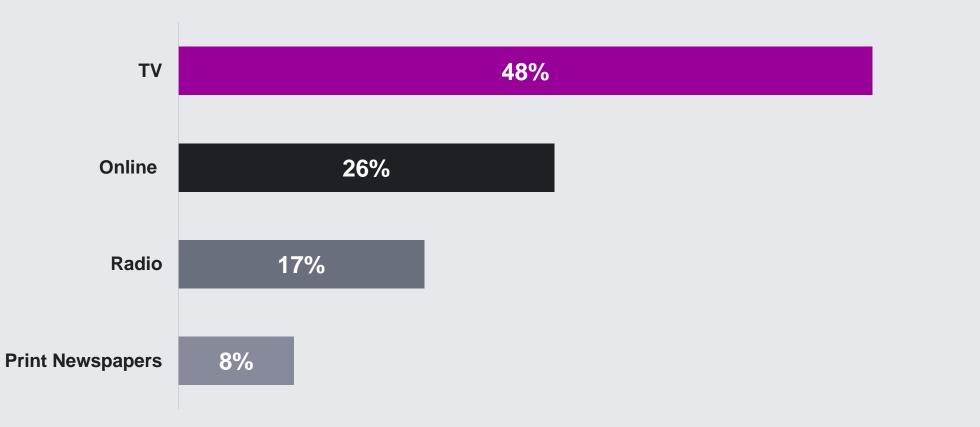




#### ECUADOR

### TV is the main source for news

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

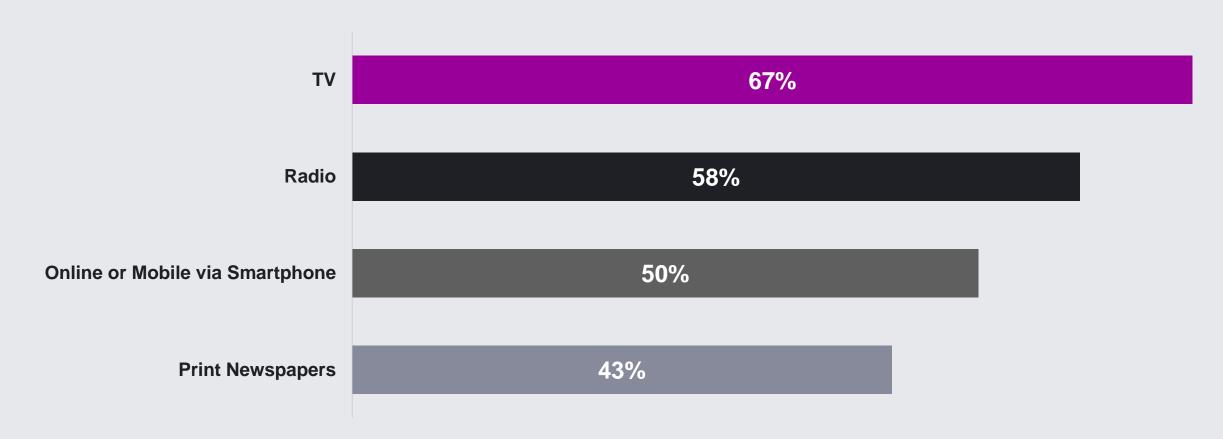




Source: Kantar Sofres/Kantar Public for « La Croix » French people's trust in media - January 2018. Base : 1 000 individuals representative of the national French population, aged 18 and more – from January 4 to 8 of 2018. Q. « In general, how do you get access to international or national news? »

#### TV is the main source for news

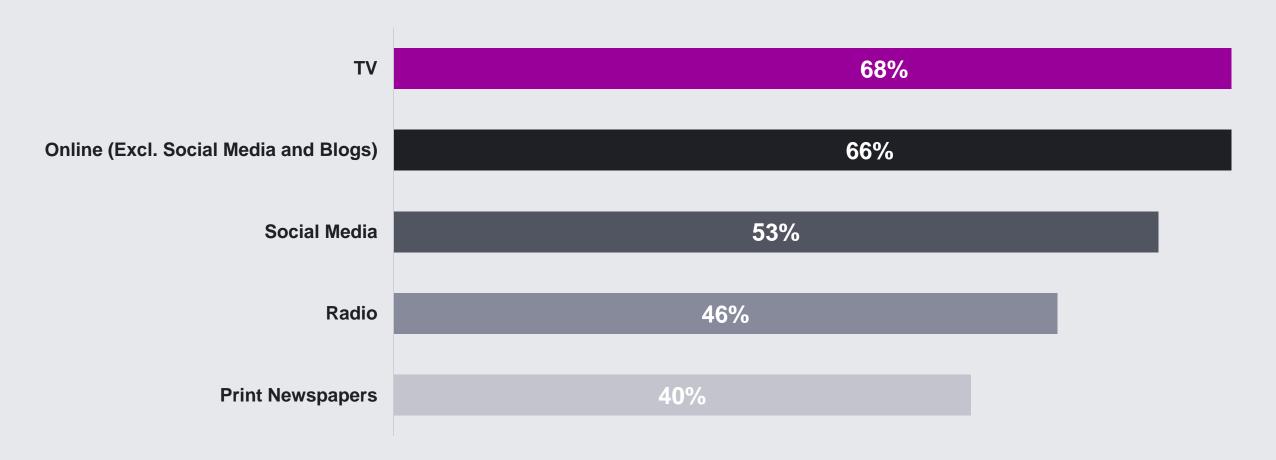
% of adults who (very) often get news on each platform





#### GERMANY

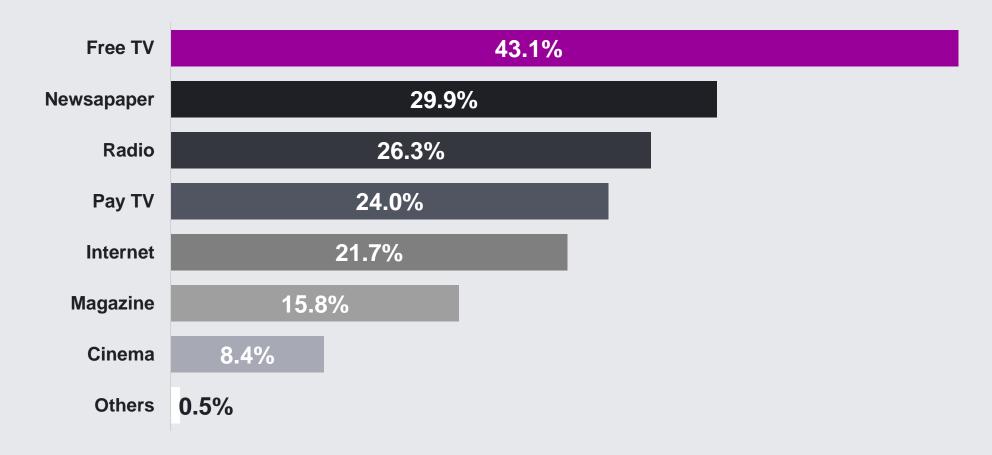
% of adults who used each platform last week as a source of news





IRELAND

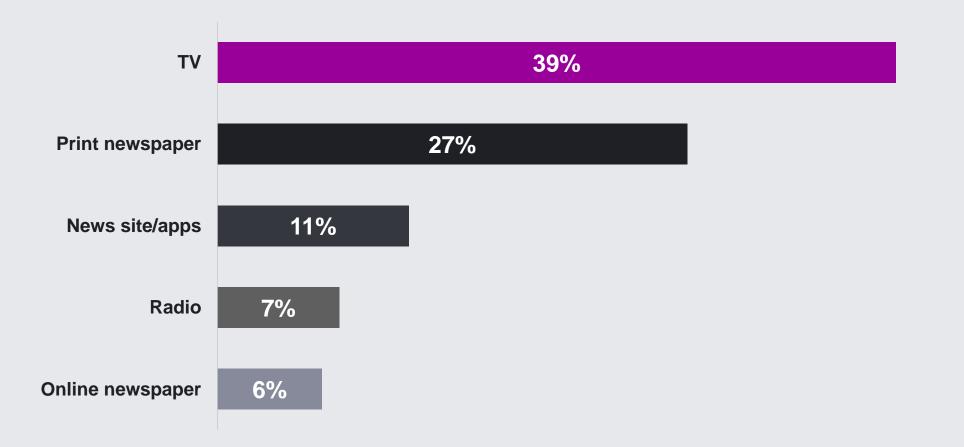
% of adults who consider the following medium as credible





### TV is the most trusted source for news

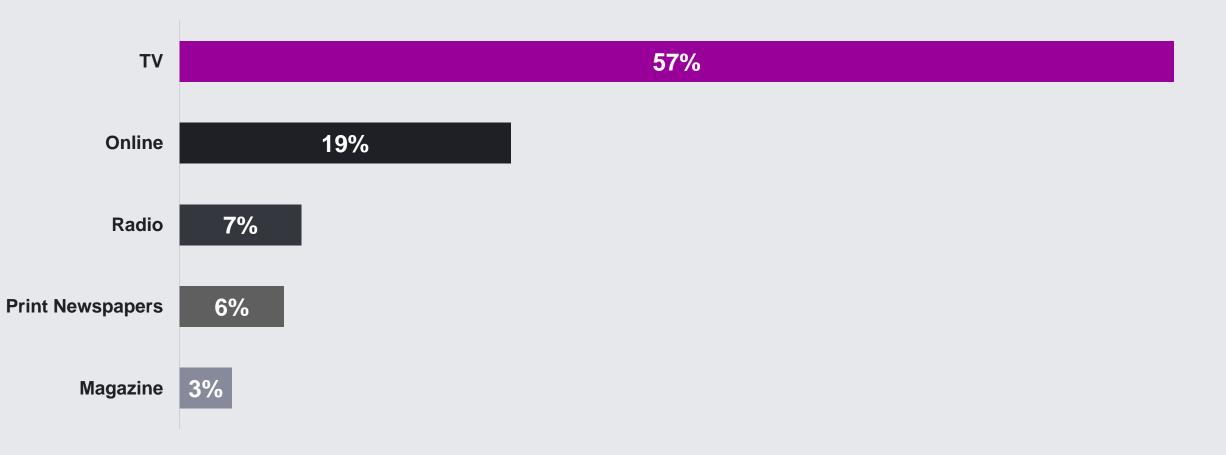
% of adults who often get news on each platform daily





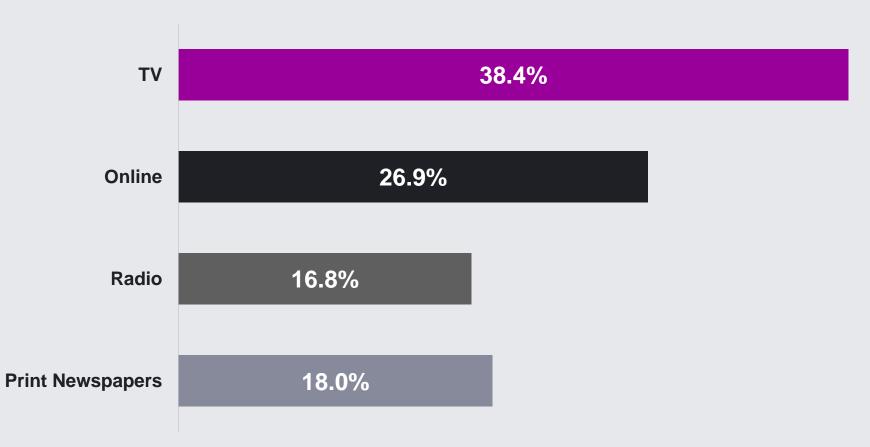
#### NETHERLANDS

% of adults who often get news on each platform



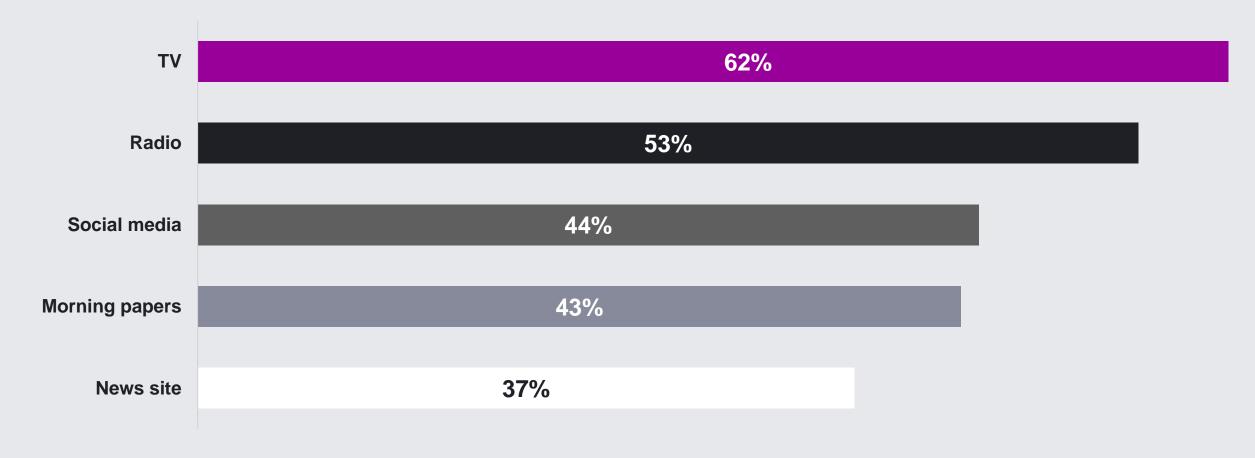


% of adults answering about their preferred media to enquire about a relevant topic



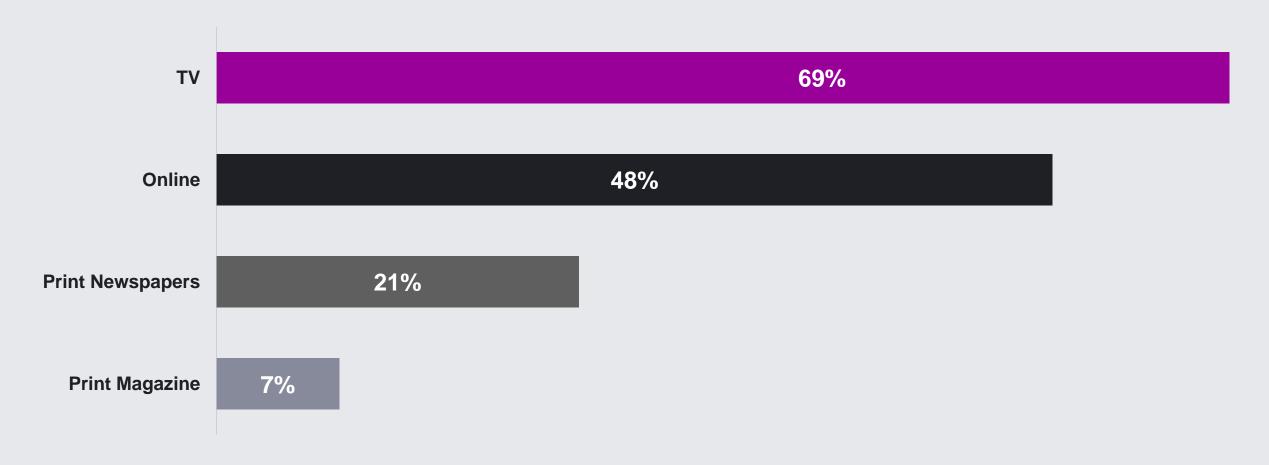


% of adults who get news on each platform on a daily basis





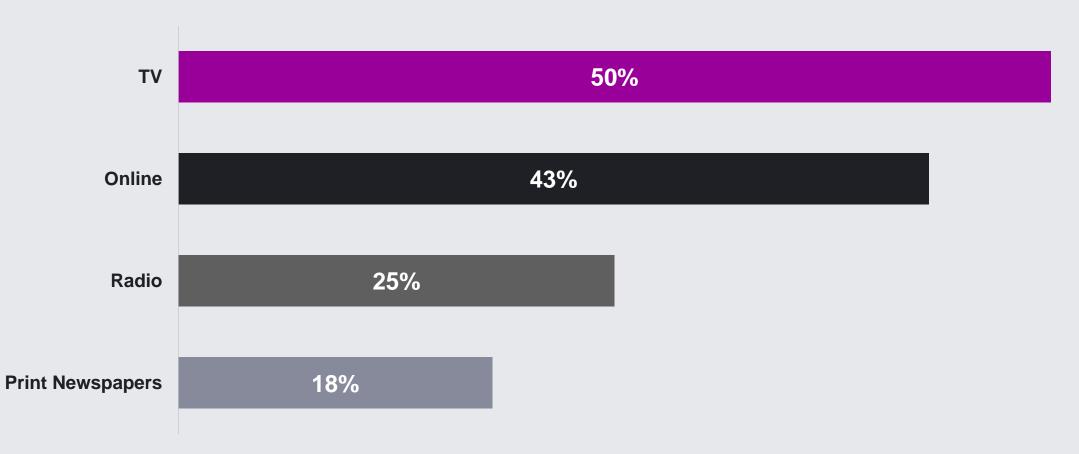
% of adults who often get news on each platform





UKRAINE

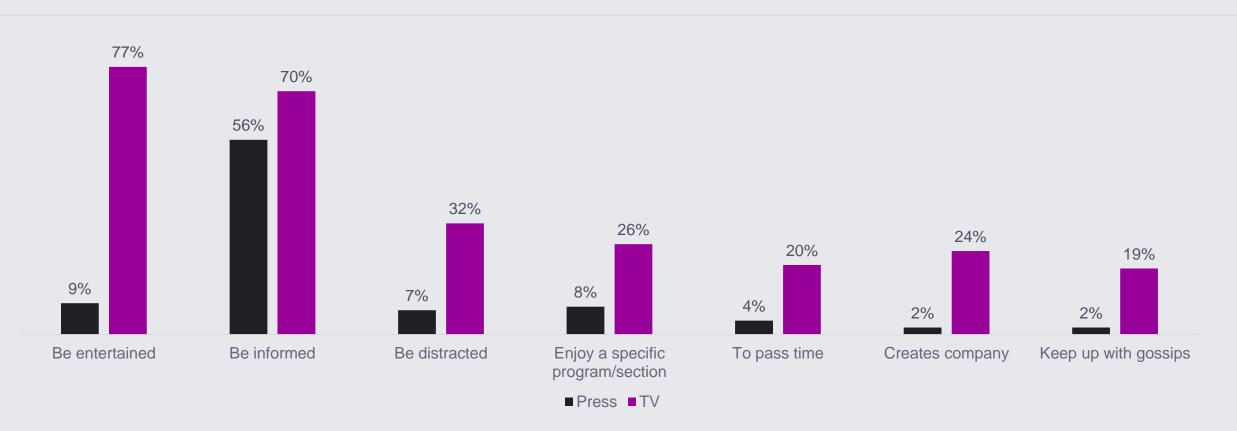
% of adults who often get news on each platform





#### **Television is more informative than newspapers**

The preferred media to...

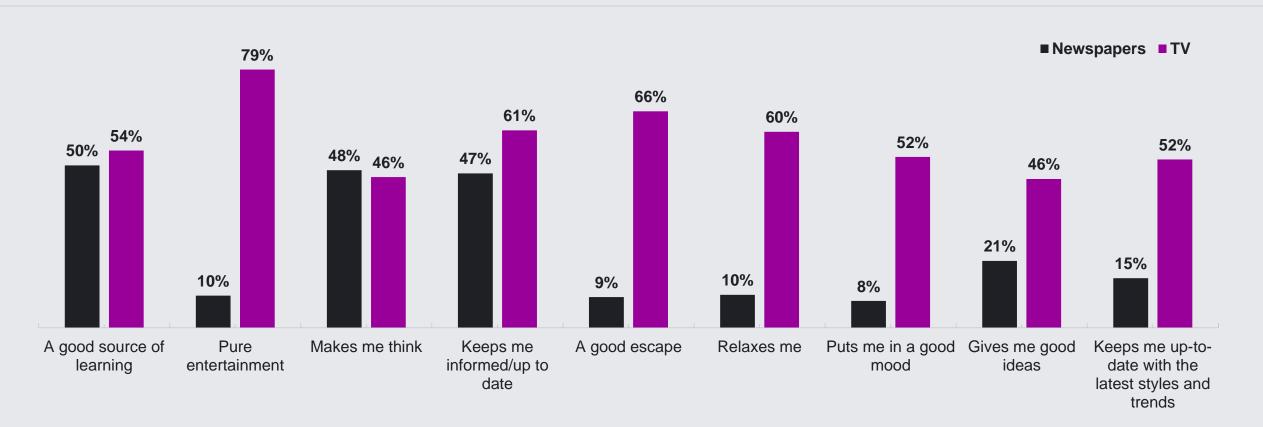




#### ECUADOR

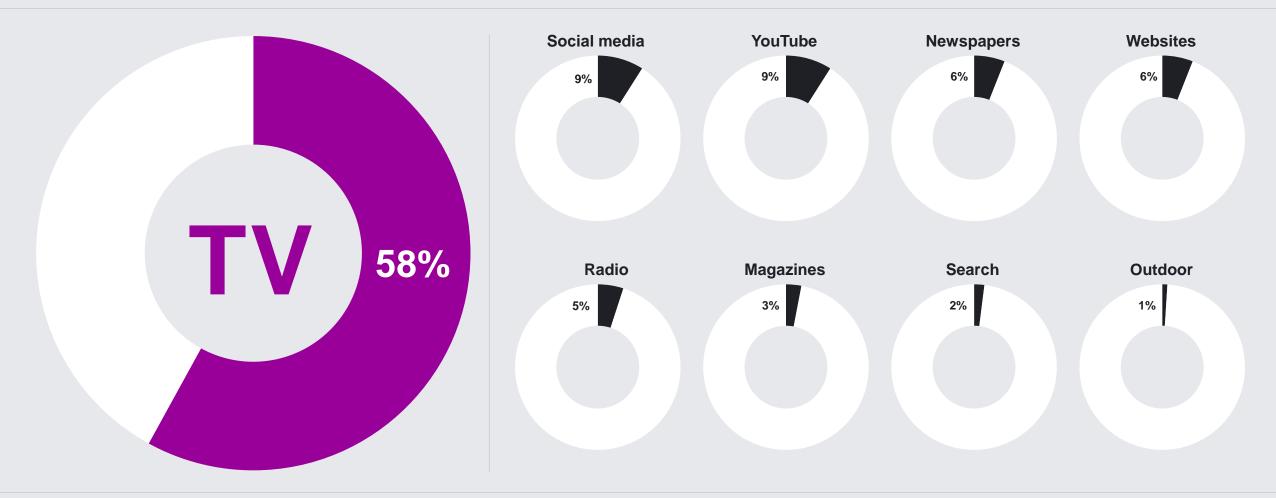
### TV is more informative than newspapers

#### Attitudes Towards Media (Adults 18+)





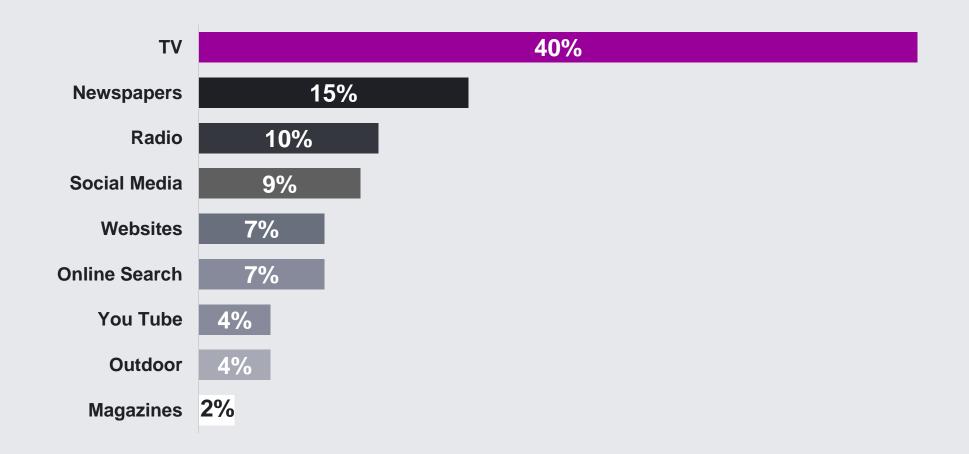
## TV ads evoke emotions more than ads in other media





### Australians trust TV advertising the most

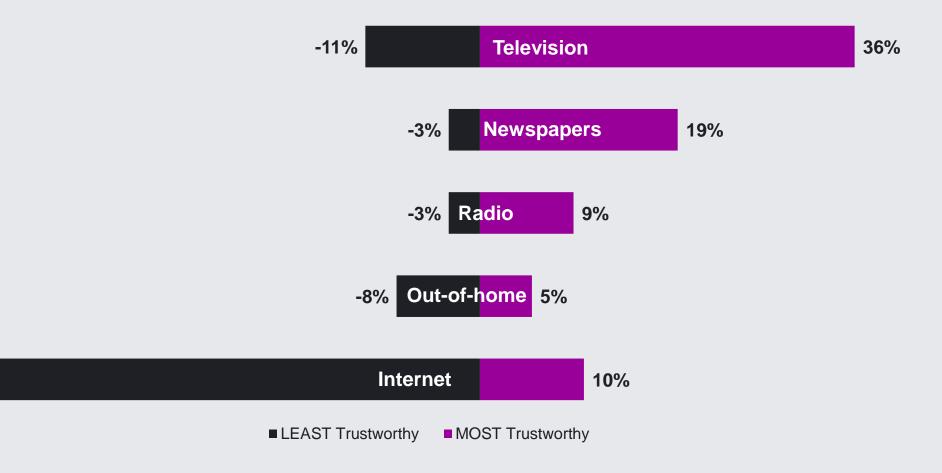
% of adults who often get news on each platform





Source: ThnkTV Ad Nation Study. April 2017. In which, if any, of the following places are you most likely to find advertising that...you trust?

AUSTRALIA





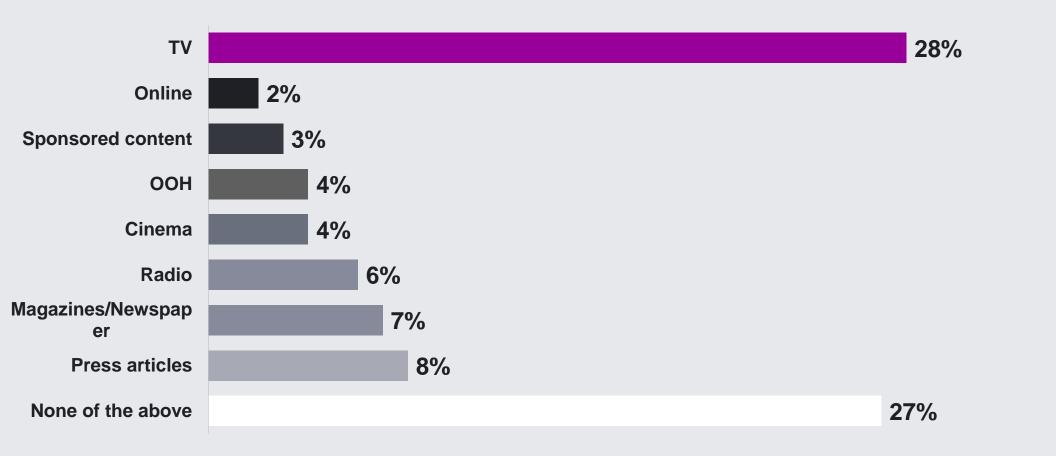
-49%

Source: nlogic, OmniVu, Total Canada, Adults 18+, June 2017. Q: Which one of the following media carries advertising that you believe to be the most trustworthy? The least trustworthy? - Read as: 45% of Canadians say that the news source they trust most is television. 49% of Canadians say that the news source they trust least is the internet.

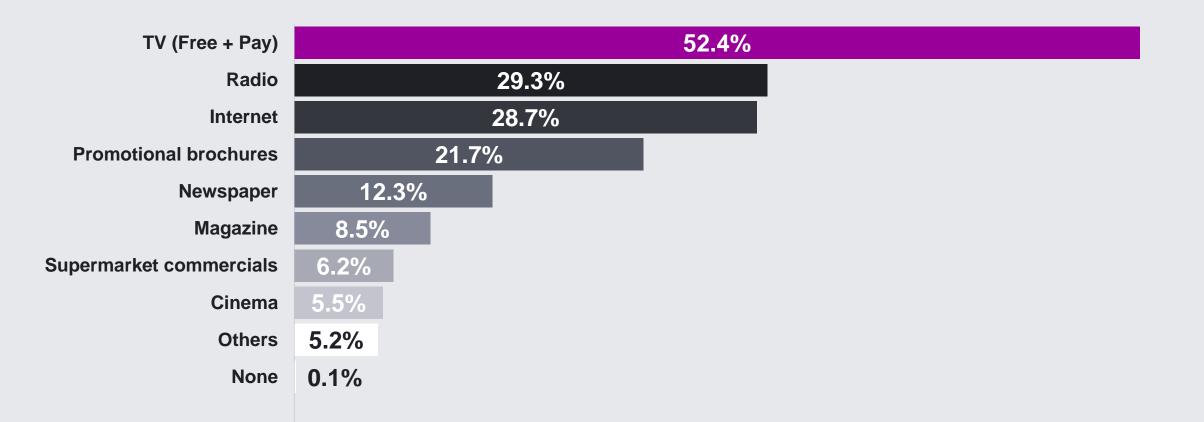
CANADA

### French viewers trust TV advertising the most

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

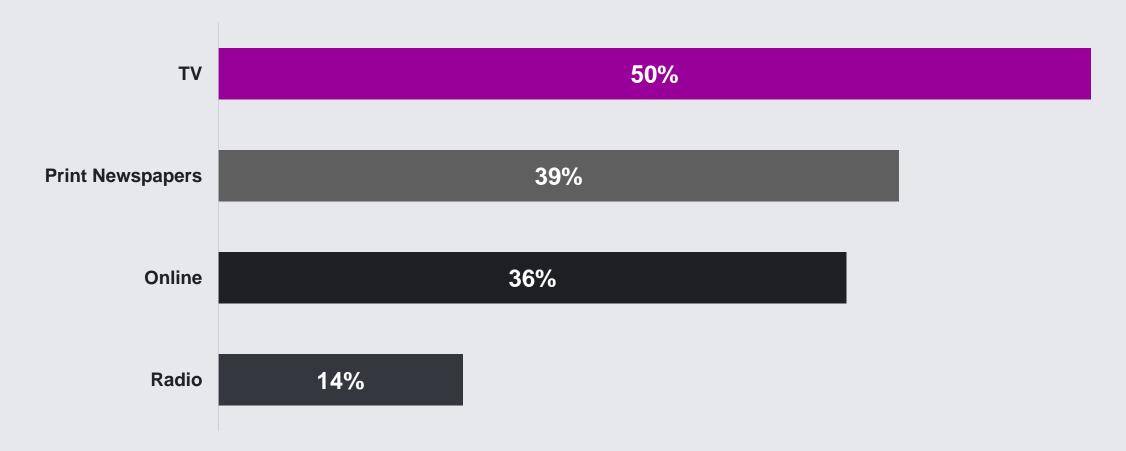








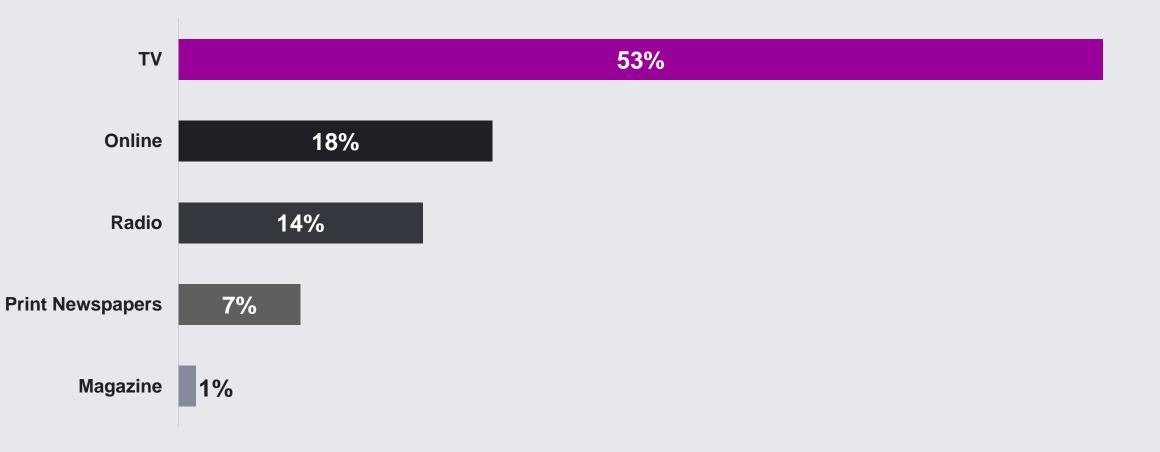
% of adults who consider the following medium as credible



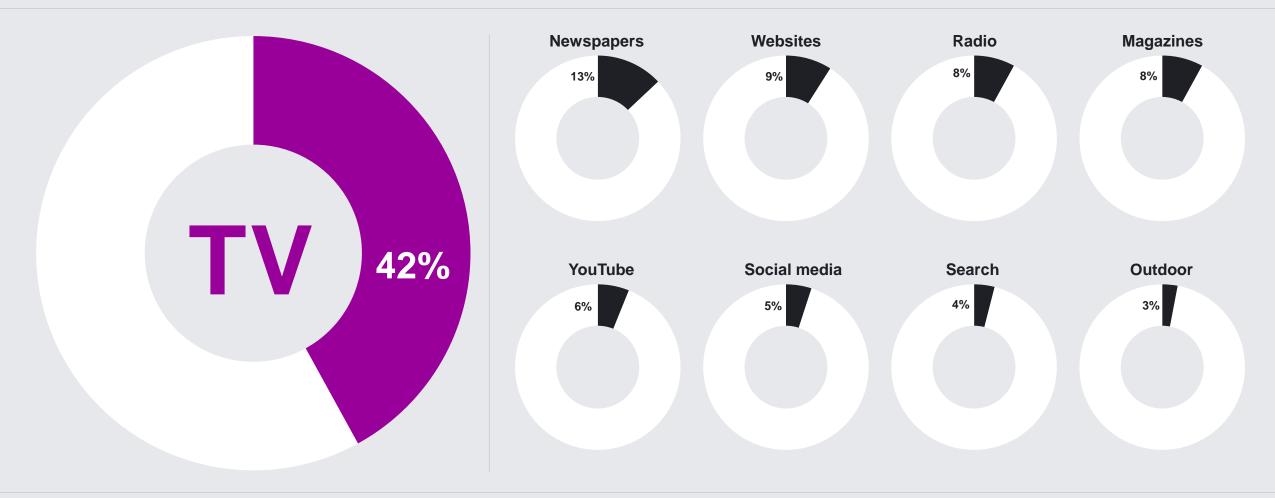


NETHERLANDS

% of adults who consider the following medium as credible





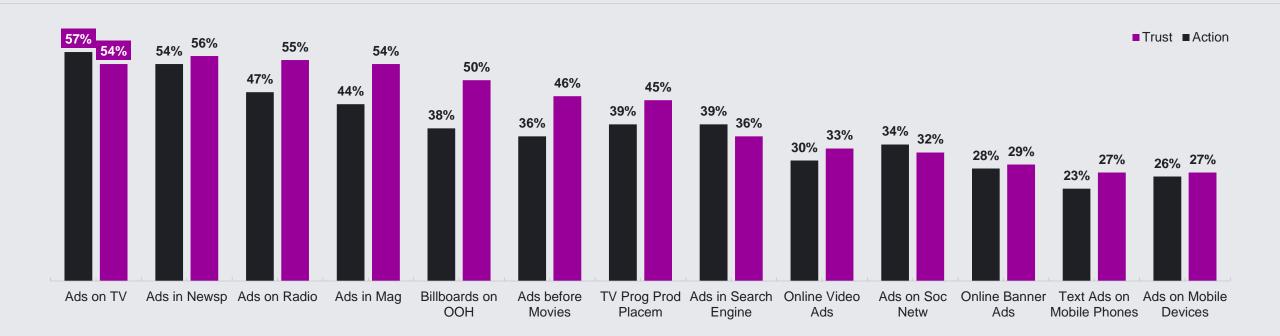




#### TV ads makes us act

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

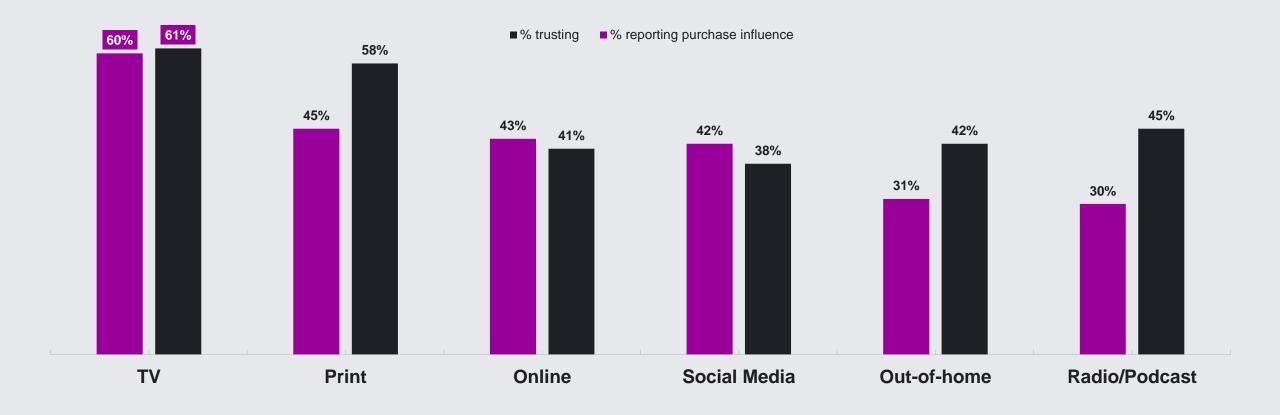
- 46% more than Search Engines
- 68% more than Social Networks
- 90% more than Online Videos





Source: Nielsen, ACA – Leading Canadian Marketers Survey Nov. 2015/Jan. 2016, A18+ Q1: To what extent do you trust the following forms of advertising? – Trust completely + Trust somewhat. Q2:To what extent do you take action on the following forms of advertising? – Always take action + Sometimes take action

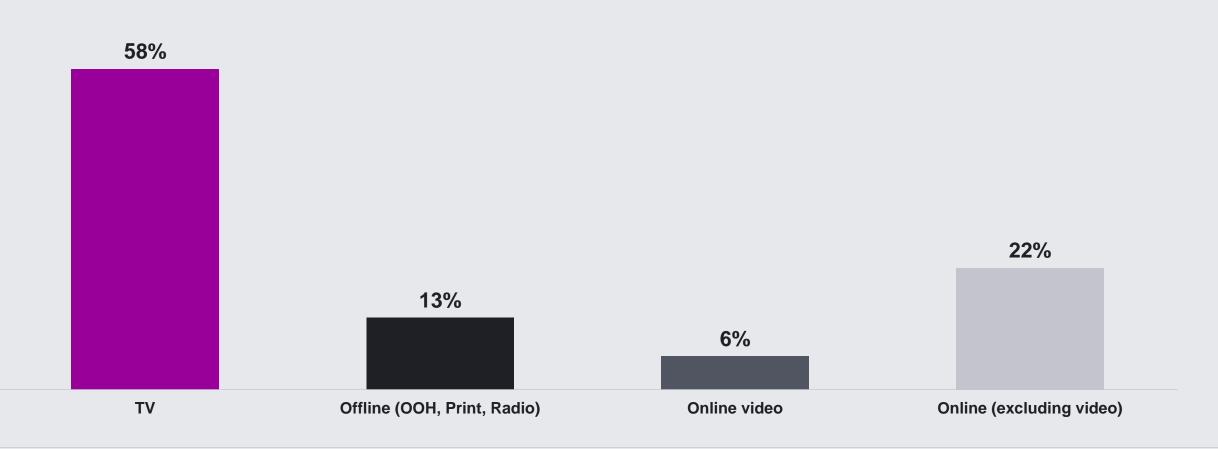
#### TV ads have the most influence on purchase





#### **TV drives sales**

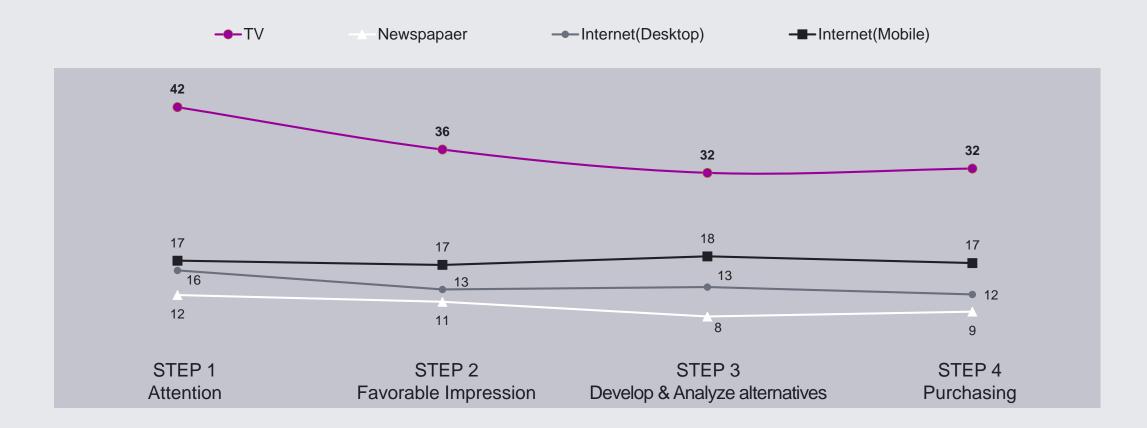
TV has a higher impact rate than all other media combined





POLAND

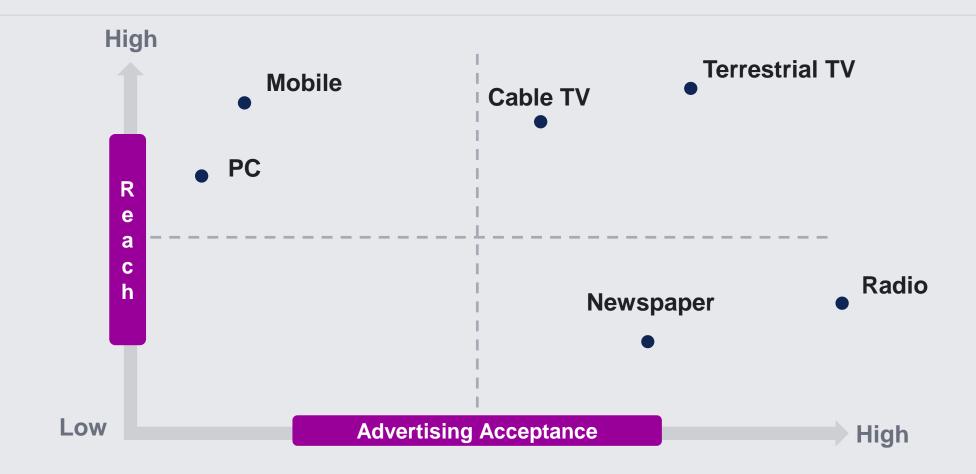
# TV is the most useful media throughout all the decision-making process





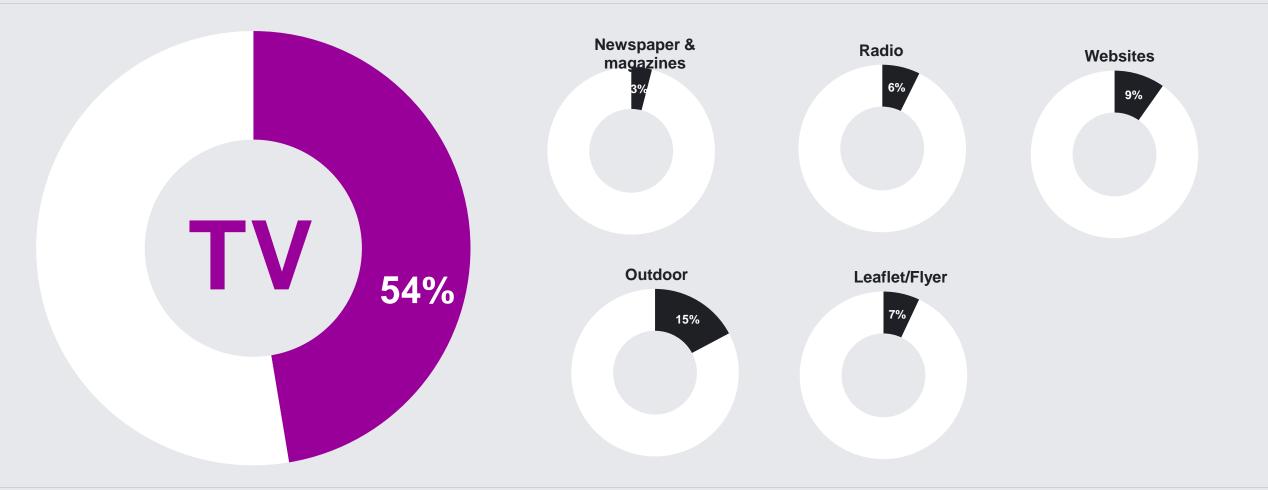
#### SOUTH KOREA

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





#### SOUTH KOREA

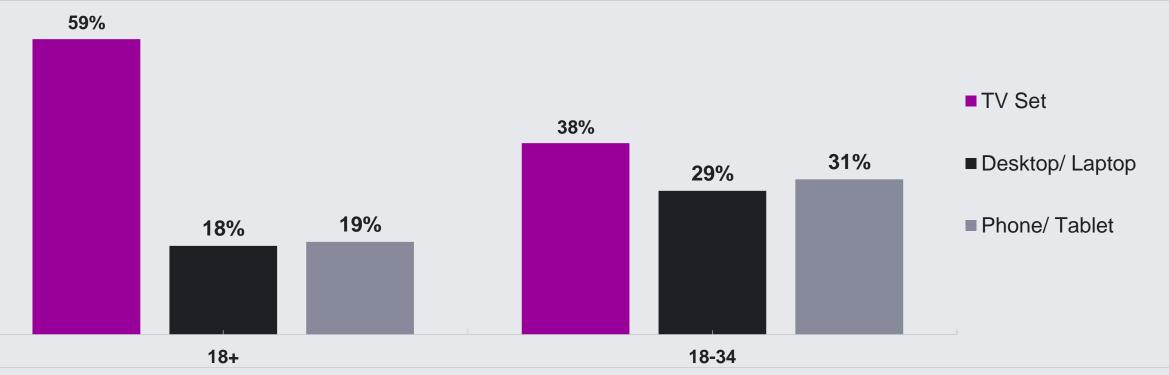




How does TV compare to video ads on other platforms?

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)

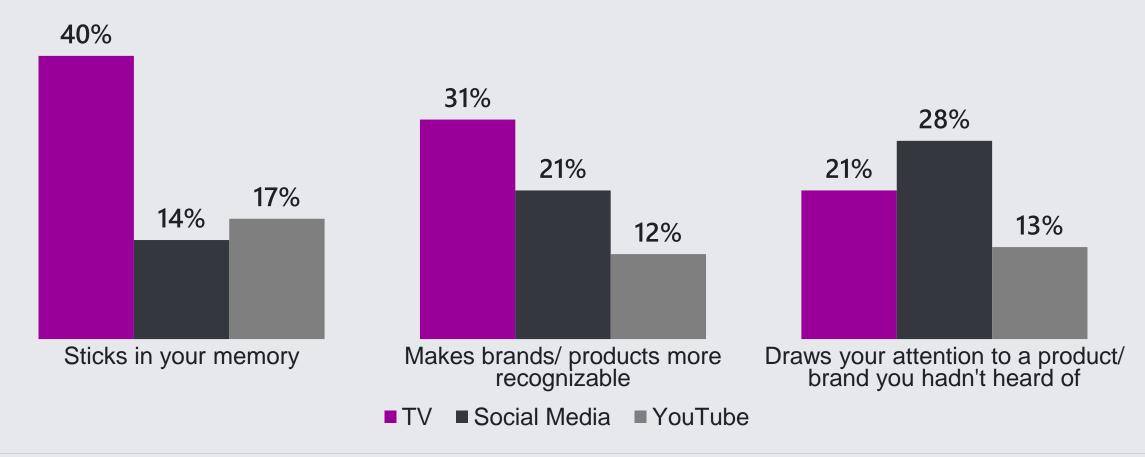




Source: nlogic thinktv OmniVu Survey, March 2018

Q. Which one of the following types of VIDEO advertising are you MOST likely to watch? Commercials viewed on a...

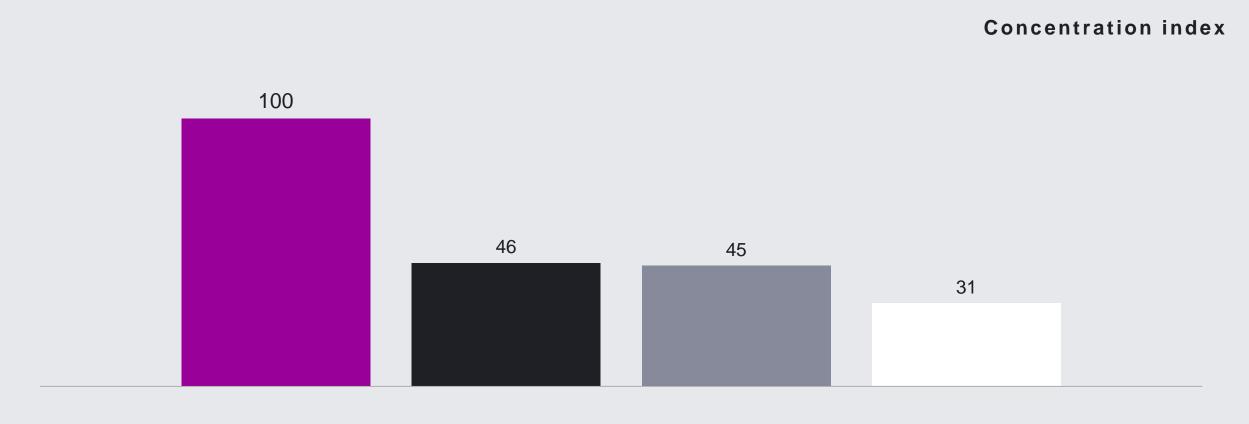
For Millennials, TV advertising is the most likely to stick in memory and make brands recognizable



The Global TV Group

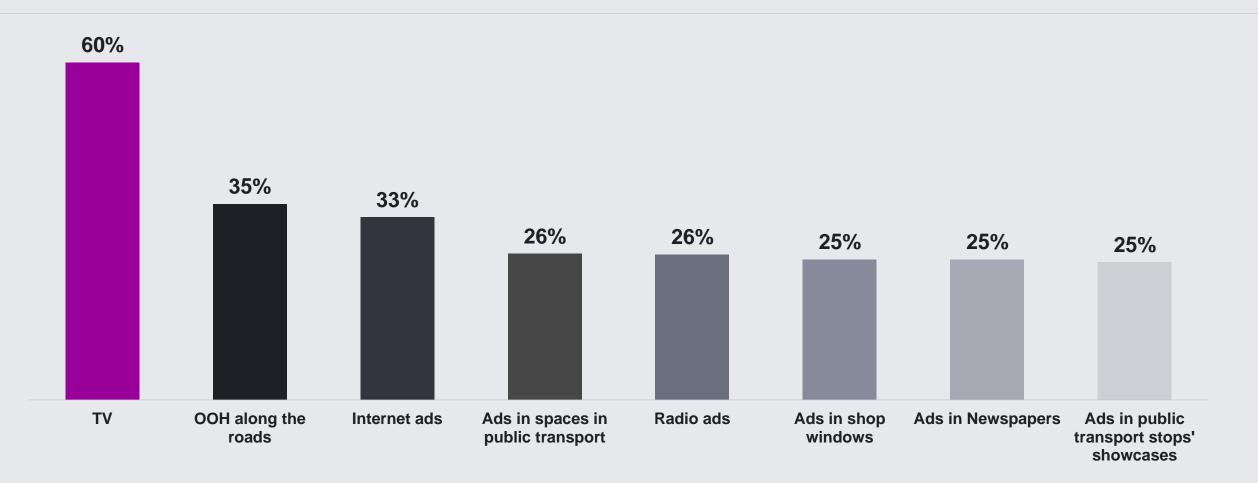
Source: Ad Nation 2017 thinktv/lpsos October 2017: Millenials 18-34 In which of the following media are you most likely to find advertising that...?

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



TELEVISION (SPOTS / TELEPROMOTIONS)
RADIO (SPOTS)
PRESS (NEWSPAPERS / MAGAZINES)
INTERNET (DISPLAY / VIDEO ADS)







■ TV

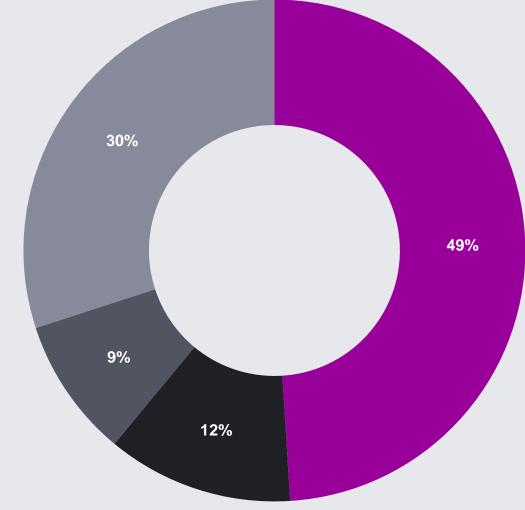
■ Mobile

■ PC

■ No

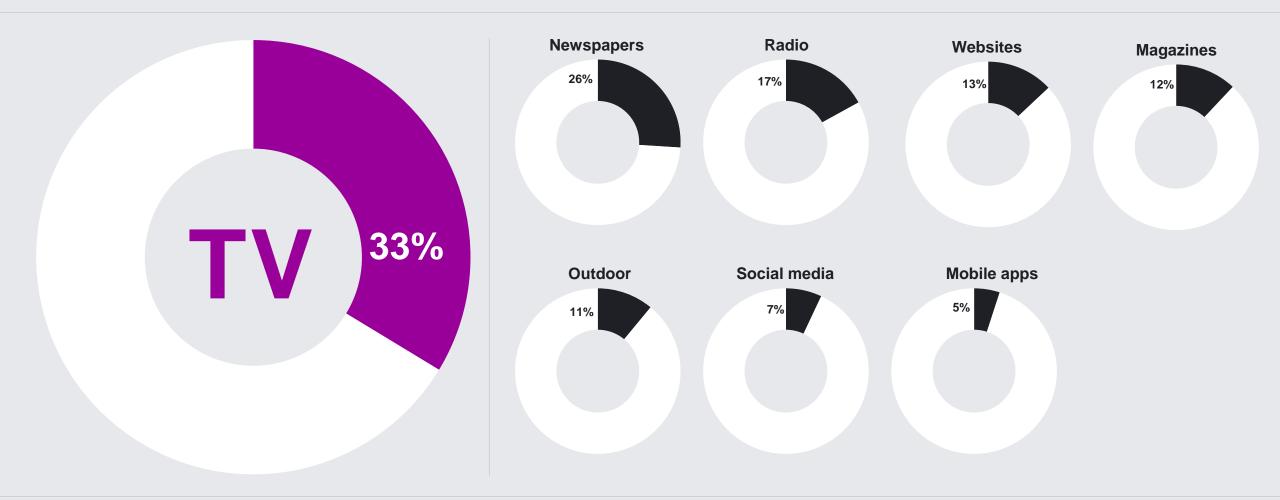
difference

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





SOUTH KOREA





Source: MA Strategy Consumer 2017. Switzerland. Individuals 14+. Question: 'How often do you pay attention to advertising on the following media? Answer: Media XY, every day / many times per week'

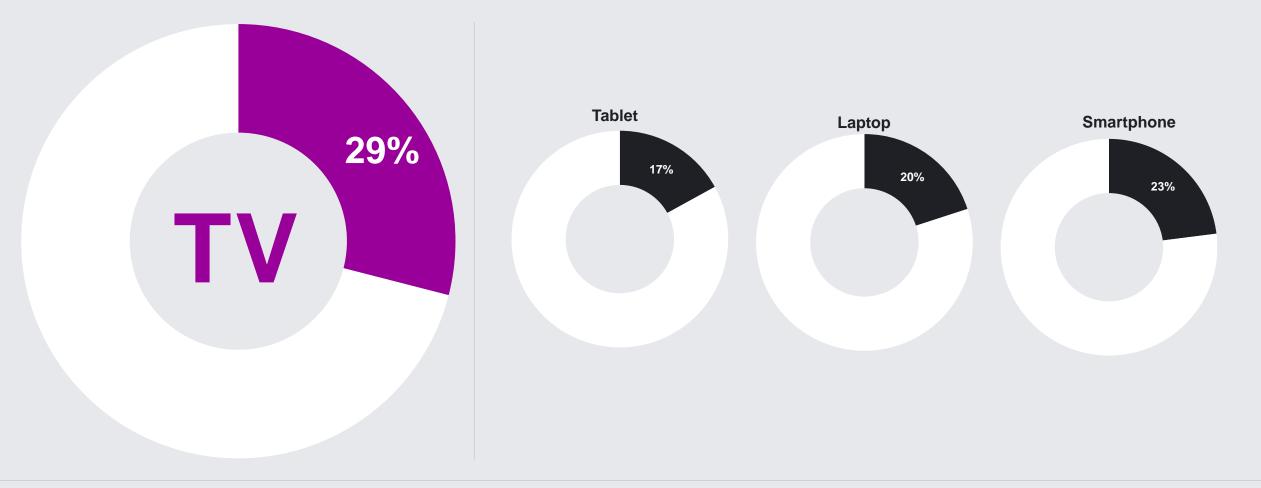
SWITZERLAND





UKRAINE

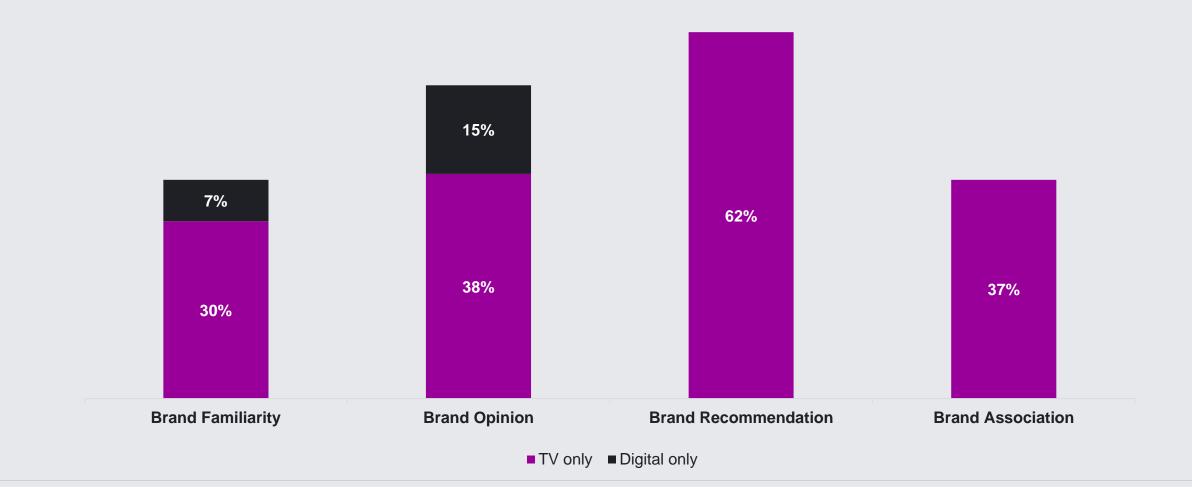
% of viewers who reported full or nearly-full attention





### 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

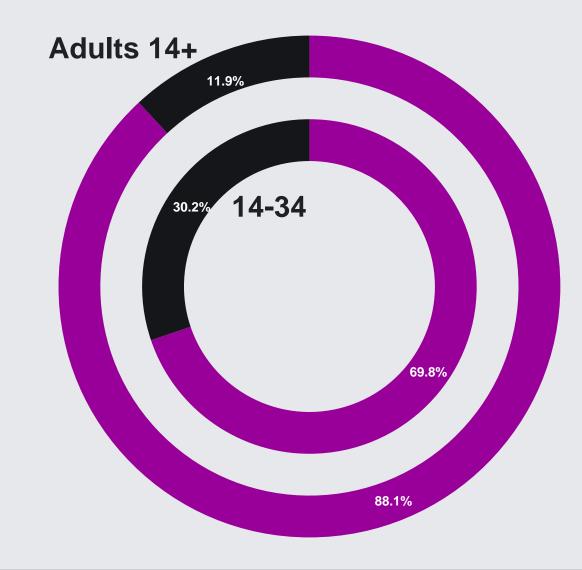
TV content

■ Video

Average video advertising time per day

Adults 14+: 220 minutes

14-34: 190 minutes





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

Live TV

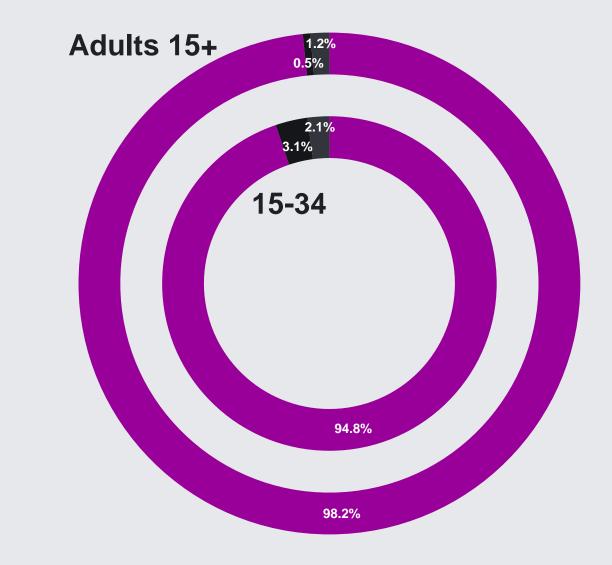
Others

■ YouTube

Average video advertising time per day

Adults 15+: 25 minutes

15-34: 15 minutes



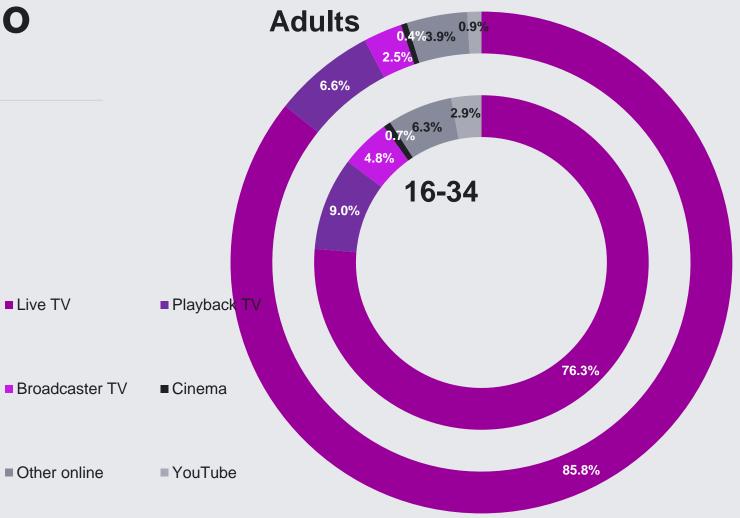


#### In the UK, TV accounts for 95% of all video advertising time

Average video advertising time per day

All individuals: 21 minutes

16-34: 14 minutes





## Effectiveness

Advertisers invest in TV advertising because it pays back



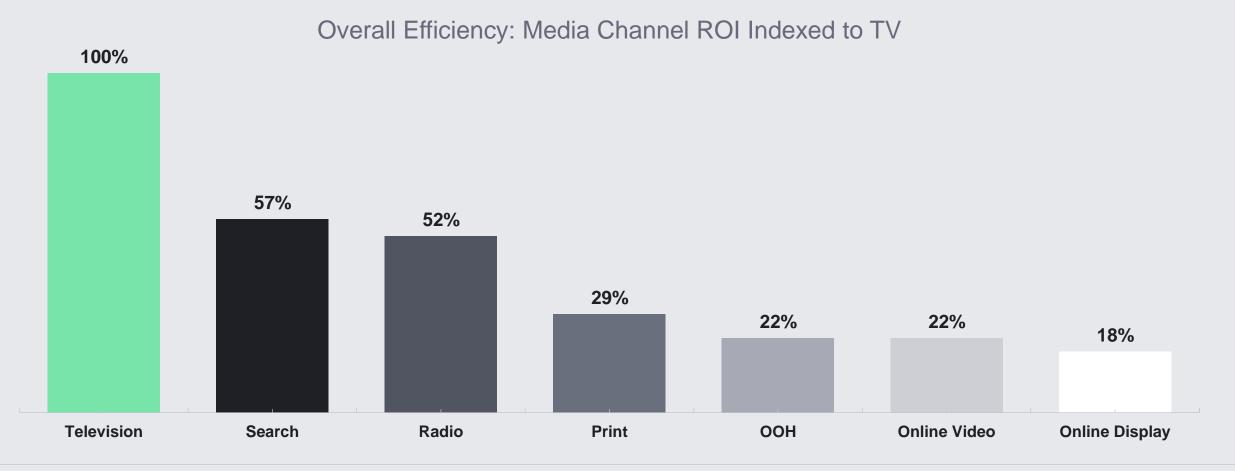
"According to the ad industry, TV has been 'dead' for 10 years. But we haven't found that to be true. TV remains the top mass-media channel for us and it has a great impact across sectors. Today, we attribute TV across continents and optimize campaigns at a much more granular level."

**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.

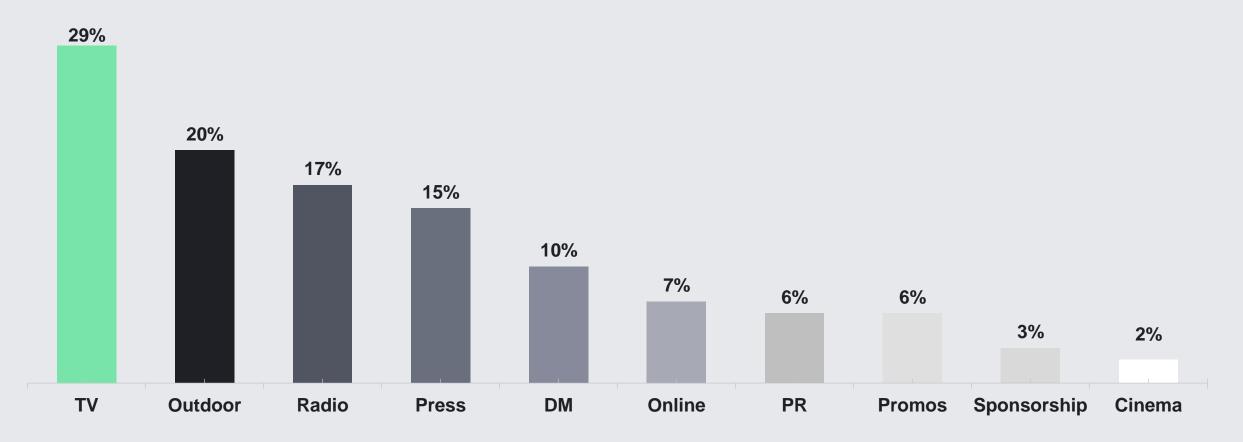




#### AUSTRALIA

#### TV is the most effective medium

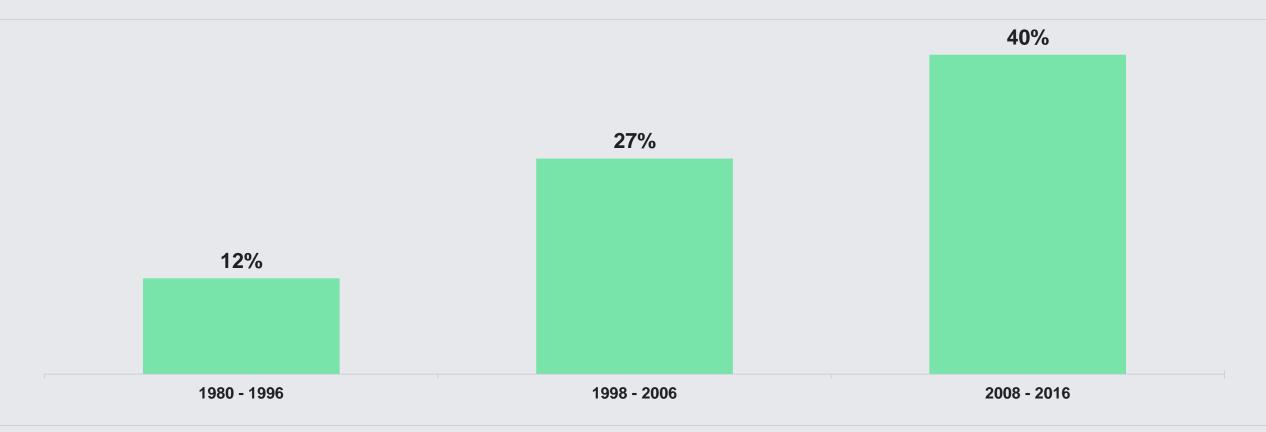
Effect of adding a medium to the mix - % increase in average number of very large business effects from adding TV (e.g. market share, brand loyalty, profit, sales, etc.)





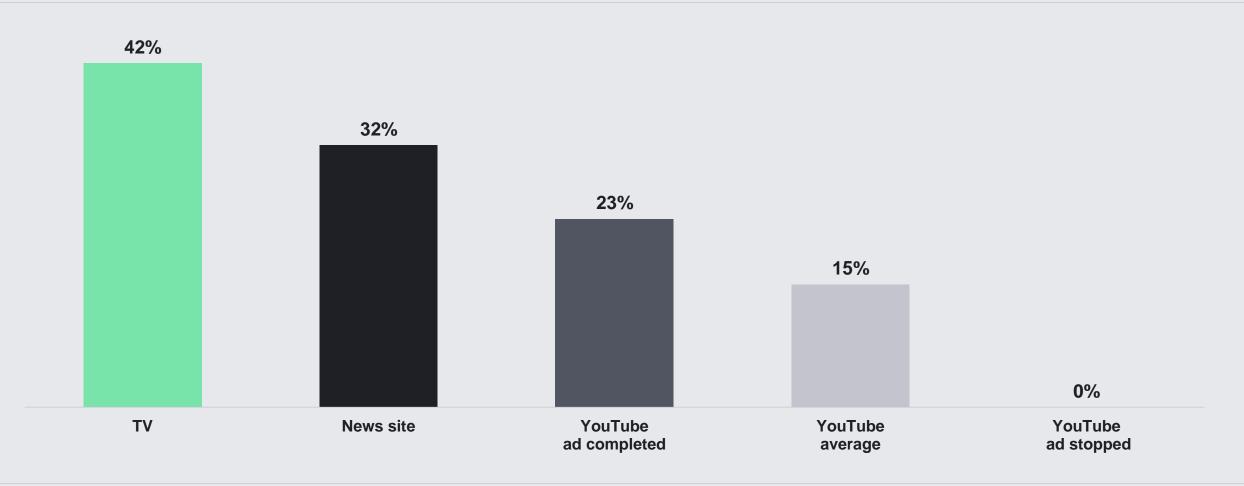
#### TV is becoming more effective

% 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



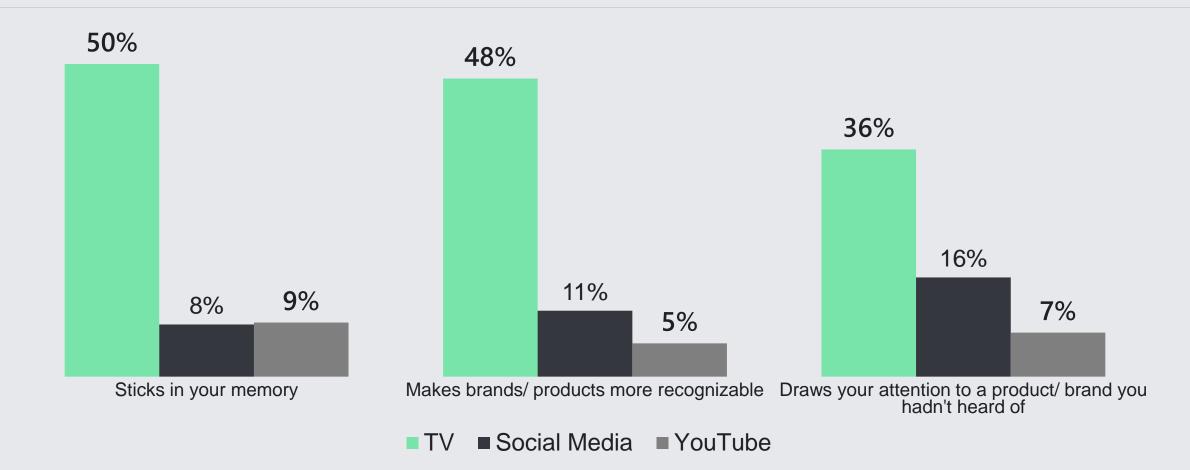


Source: IP Belgium + Mind Insights 2016, research by Mind Insights based on Eye-tracking, 84 French speaking persons between 20-60 years old

#### **BELGIUM SOUTH**

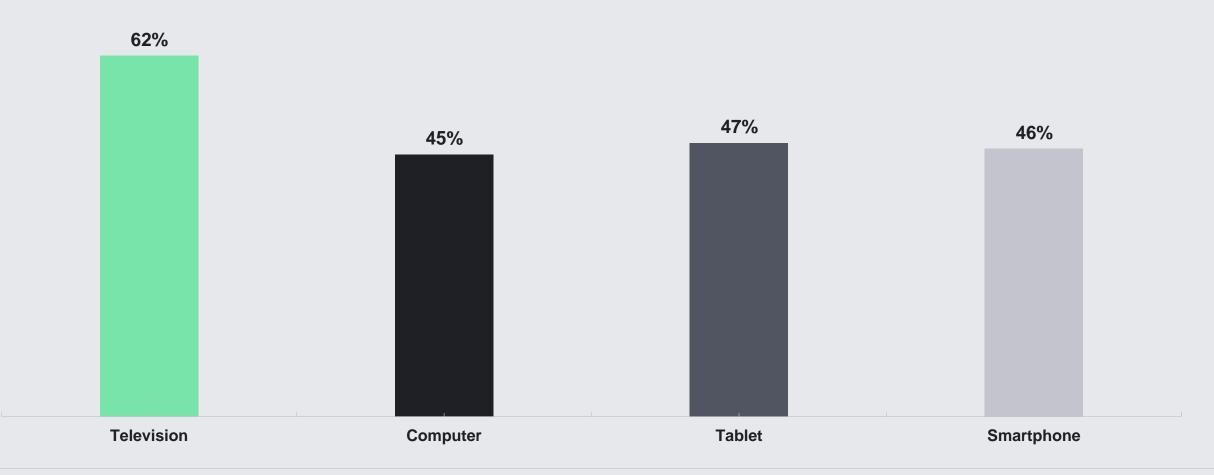
### TV ads are the best for brand building

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





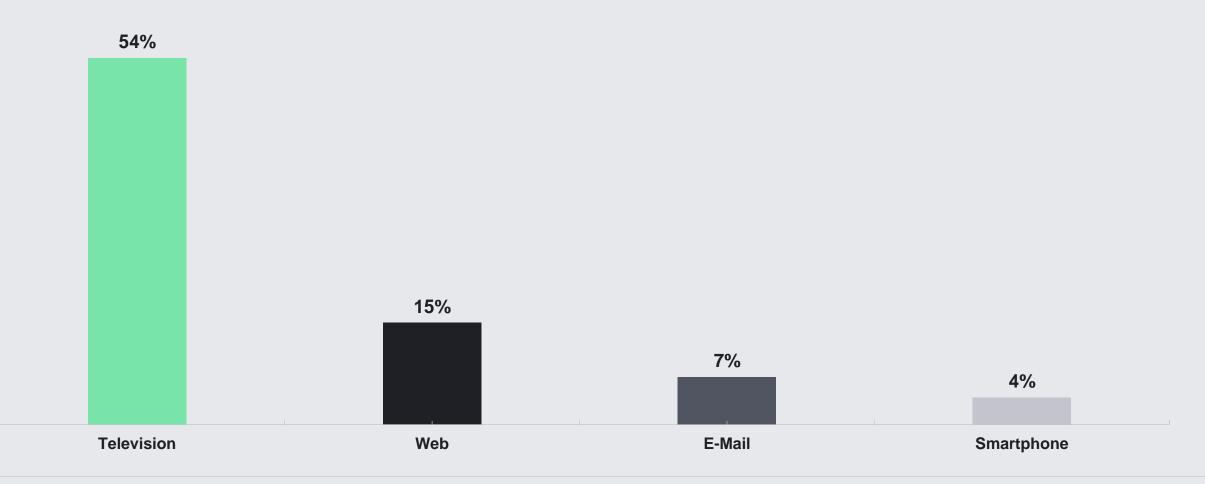
Percent who correctly recall half or more of advertisers





Source: Evaluating Engagement & Recall by Platform. Council for Research Excellence, June 2016, A18+. QF3B: During the show, did you see commercials for any of these brands/products? – Total or 38 national ads tested across five shows.

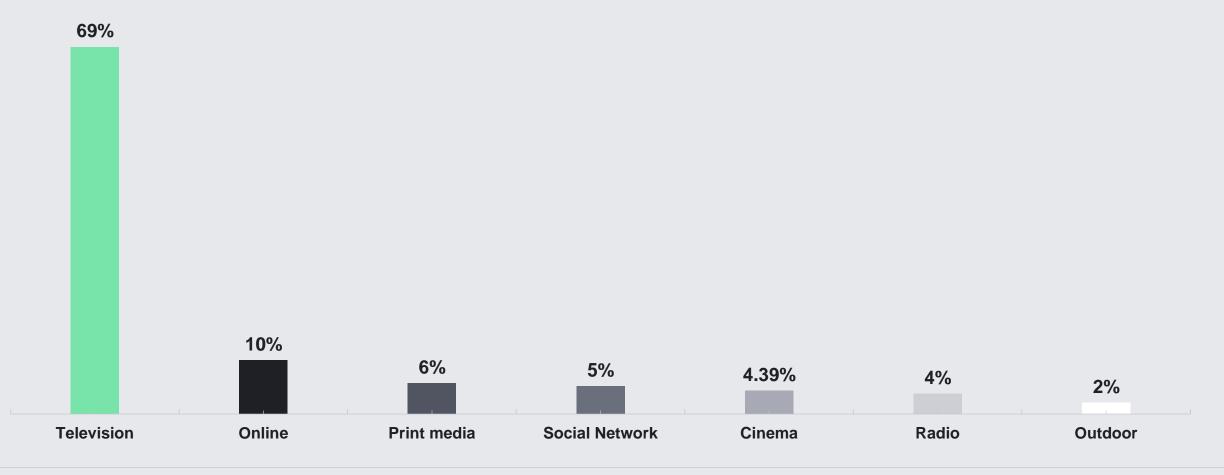
Q: What kind of advertisements is the most memorable to you?"





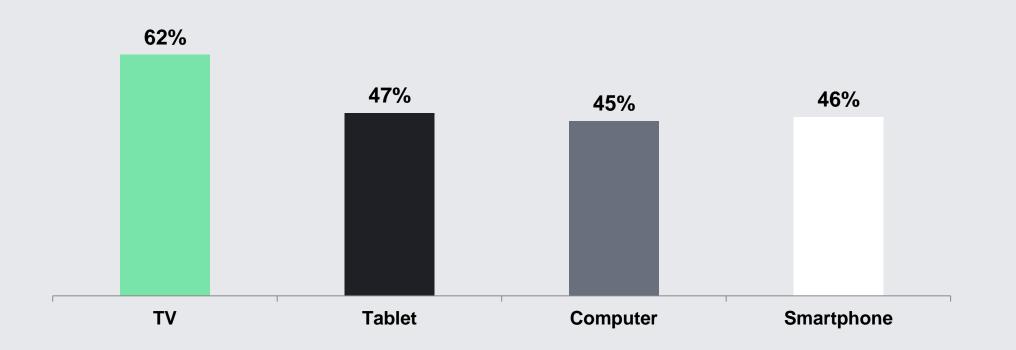
Source: Nielsen homescan panel survey; Adult population. March 2017. Answers from almost 18.000 respondents who have been asked the following question: "What kind of advertisements is the most memorable to you?"

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





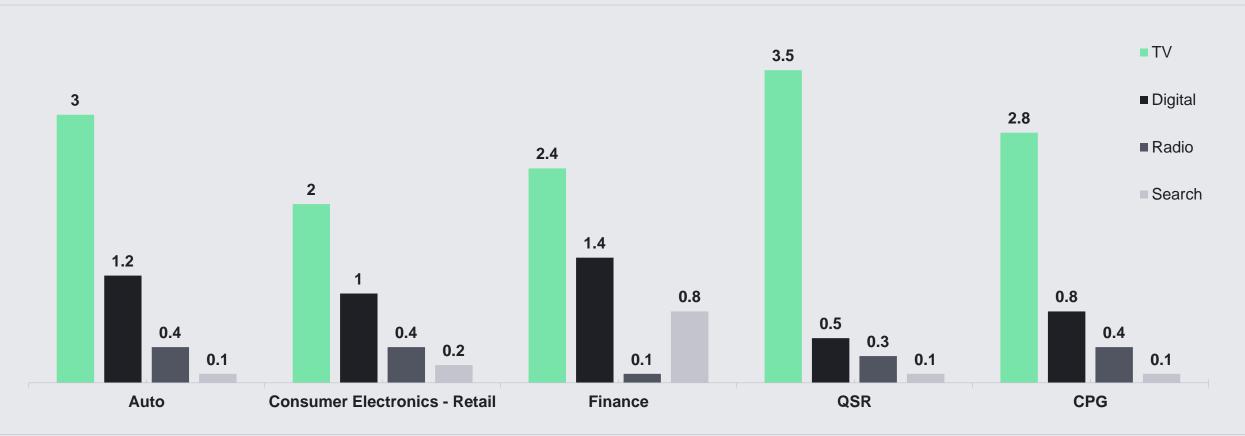
% of viewers able to identify half or more advertisers after viewing content





#### TV is the most efficient medium to drive sales

Relative lift factor on outcomes





Source: GroupM Canada, 2015-16, Econometric Marketing Mix Models of clients across 5 categories: Auto, Retail, Consumer Electronics, Finance, Quick Service Restaurant (QSR) & Consumer Packaged Good (CPG); Report "Target the (Whole) Market"

CANADA

#### 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

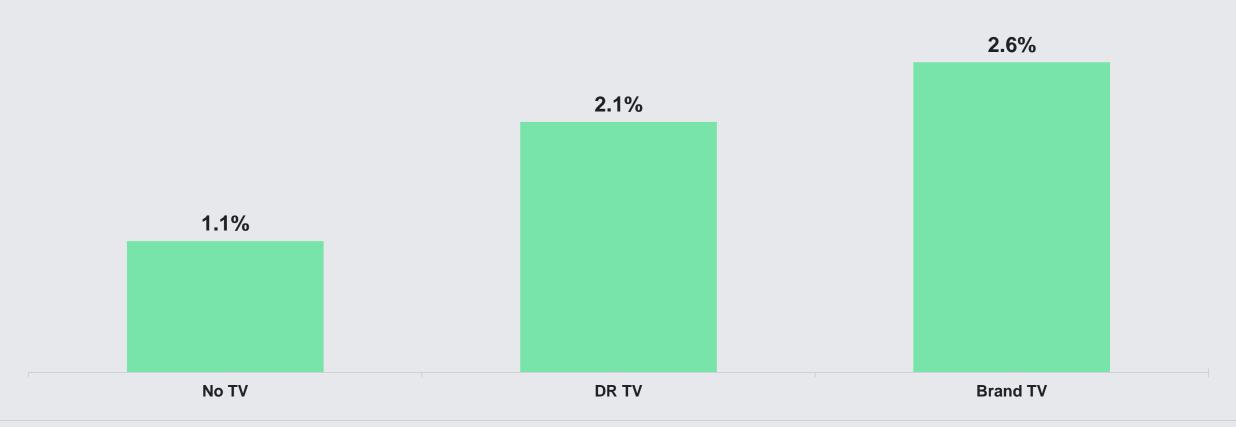


Source: MarketingScan. Findings based on campaigns since 2007 from Single Source TV-Achats. Base : 877 observations.

#### TV is the best media for market share growth

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

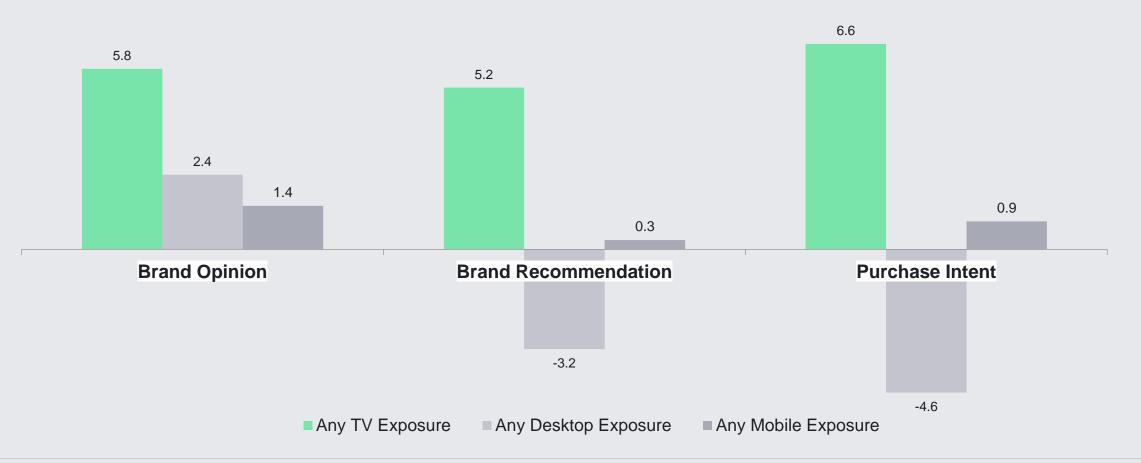
Average market share points gained per annum





#### 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.

τν	Online	Newspapers	SEM	Radio	Magazines	ООН	Cinema
99%	89%	81%	75%	58%	56%	35%	0%



Source: Dagmar & Screenforce Finland – Tv Advertising Effectiveness Study (Dagmar econometric sales models 2012 – 2016).

#### 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

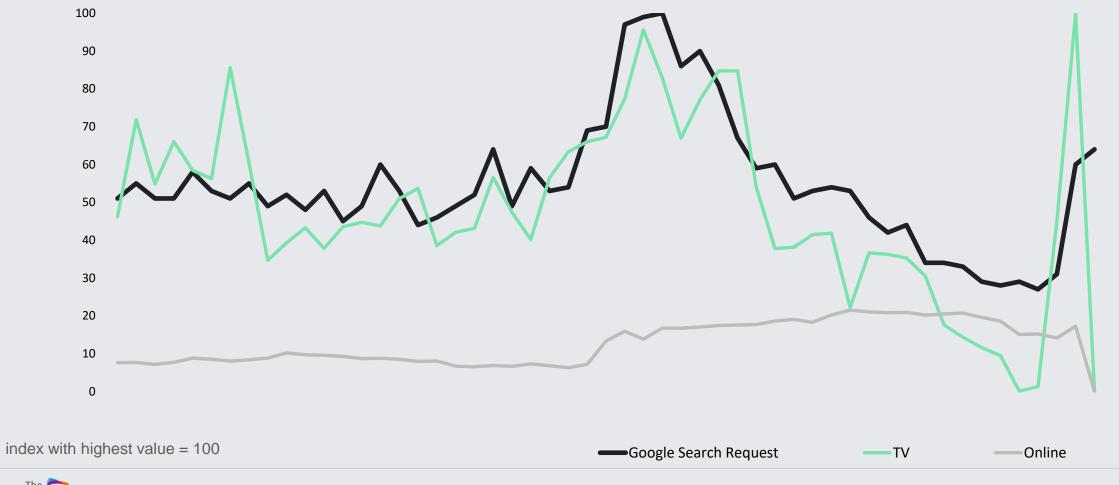
	All advertisers	Pure-players	Multichannel advertisers
Campaigns	100%	50%	50%
Average organic traffic increase in %	55%	43%	66%



Source: SNPTV Guide 2018. Realytics - Classical space campaigns and sponsorship tracked between july 2016 and june 2017. \*Direct + Search Engine Optimization (SEO) + Search Engine Advertising (SEA). Average organic traffic calculated from the organic traffic of the advertiser on its website and/or mobile app.

#### TV drives traffic to the web

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



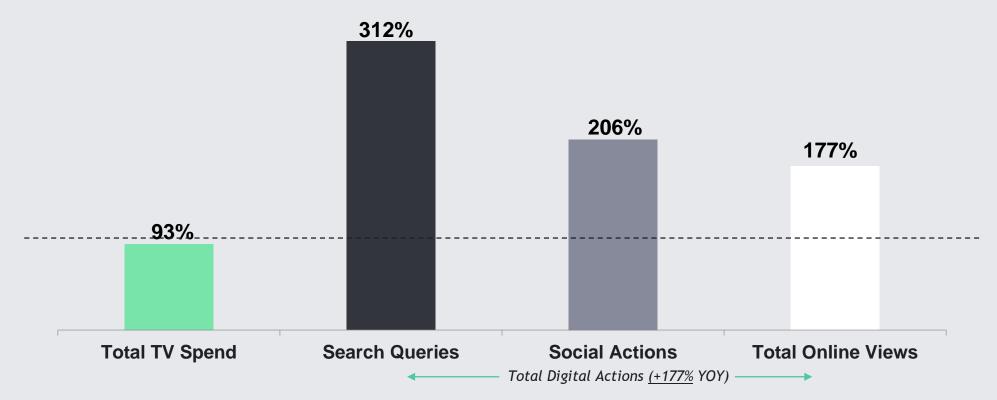
#### SWITZERLAND

Global Source: Google Trends / Mediafocus AdWizzard

#### 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

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

Month prior to TV Monthly average: % difference Company TV launch-Jan 2018 launch Blink Health 449 +72% 261 Chewy 1.732 5.570 +222%Eloquii 165 200 +21% +221% Flipp 2,133 6,835 Harry's 764 1,118 +46% MVMT 192 912 +375% Nerdwallet 4.269 12,005 +181% +82% Poshmark 5.865 10.680 +130% Remitly 117 269 Saatva 184 343 +86% Stitch Fix 2,241 1.151 +95% Sun Basket 197 479 +143% ThredUp 2.554 2.991 +17% **Top Hatter** 1.891 4.317 +128%



Source: VAB analysis of comScore mediametrix multiplatform media trend data; total audience (Desktop P2+. Mobile 18+), February '15 – January '18 (calendar months). 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), Feb '15– Jan '18 (calendar months). N/A = not enough traffic for comScore to measure.

Monthly website unique visitors comparison (in thousands)

### TV advertising positively impacts the advertiser's brand image

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

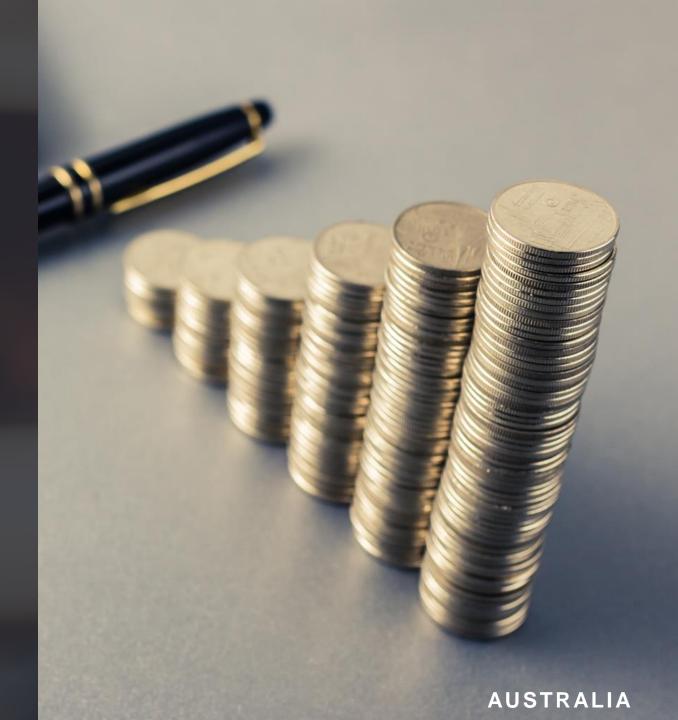




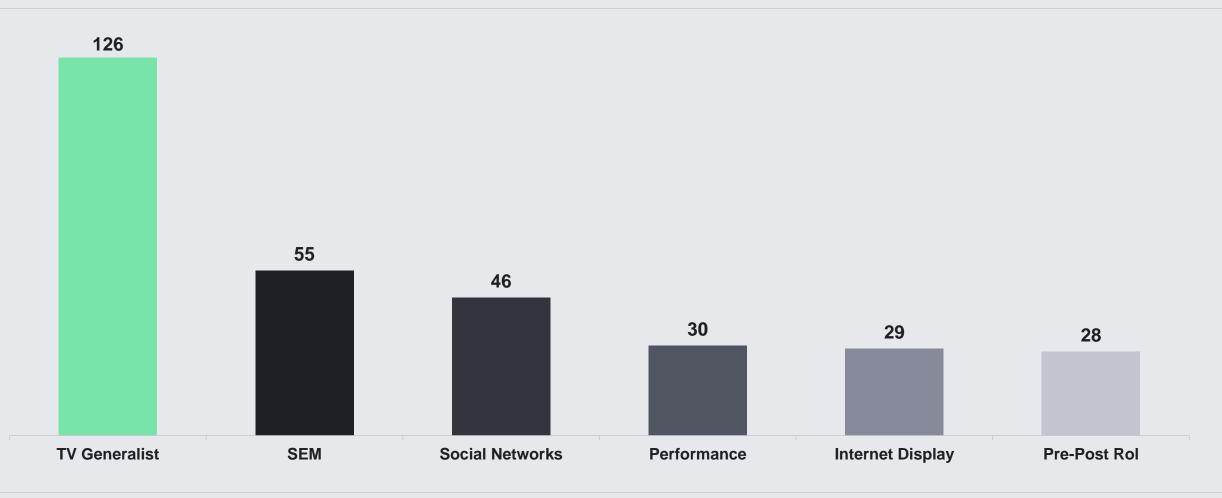
#### TV is the greatest profit generator



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



#### TV provides the best ROI for advertisers



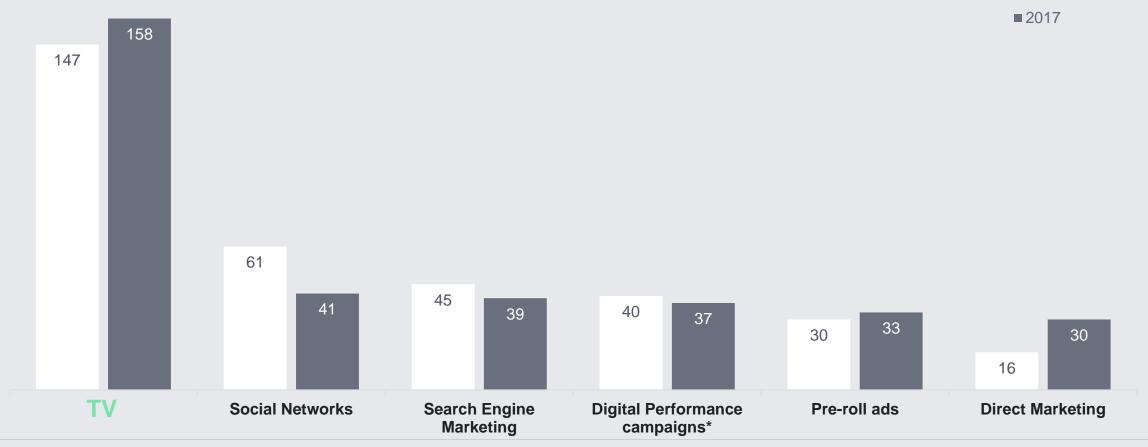


Source: Study on investment trends in Marketing and Media, Trendscore 1S 2016. Marketing Directors were asked the top 3 media in terms of ROI, giving 3 points to the biggest ROI provider, 2 to the second and 1 to the third.

**SPAIN** 

#### 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.



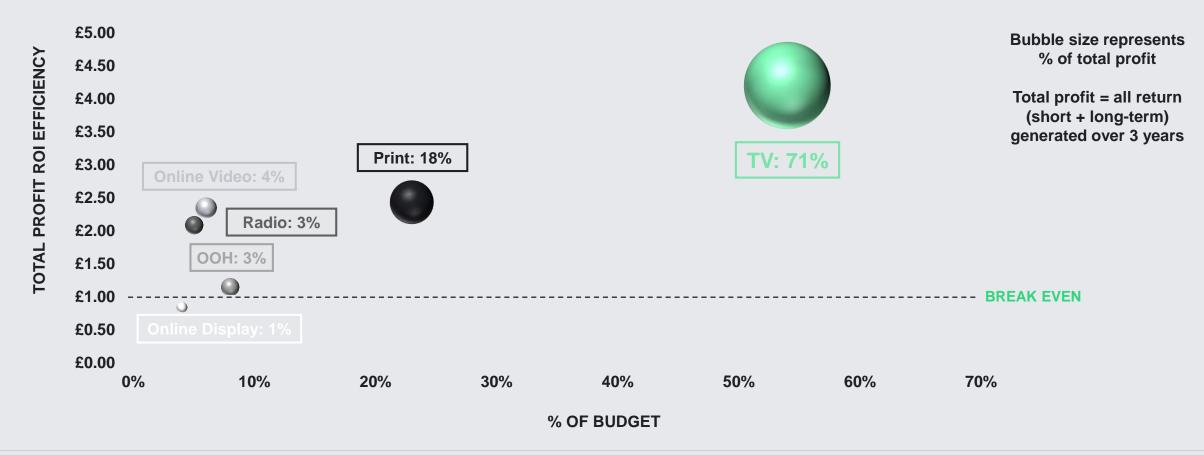
2016

SPAIN



Source: Study on investment trends in Marketing and Media, Trendscore September 2017. \*Campaigns with possible targeting, with purchase based on Cost Per Lead (a lead is an individual that has expressed interest in your (type of) product of service by completing a goal) or Cost Per Action.

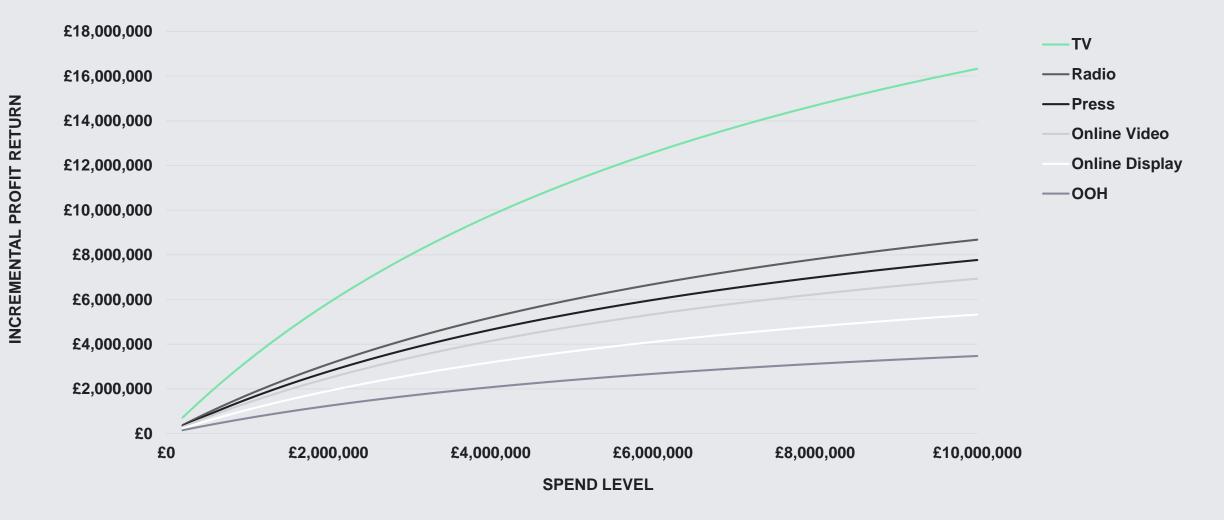
### Proportion of advertising-generated profit by medium





Source: Thinkbox. 'Profit Ability: the business case for advertising', Nov 2017. Ebiquity ROI campaign database (Feb'14-May'17) & Gain Theory. Campaign obs: 1,954. Online Video includes Broadcaster VOD, YouTube, Facebook video & online programmatic video

#### 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.



### Advertising investment in %

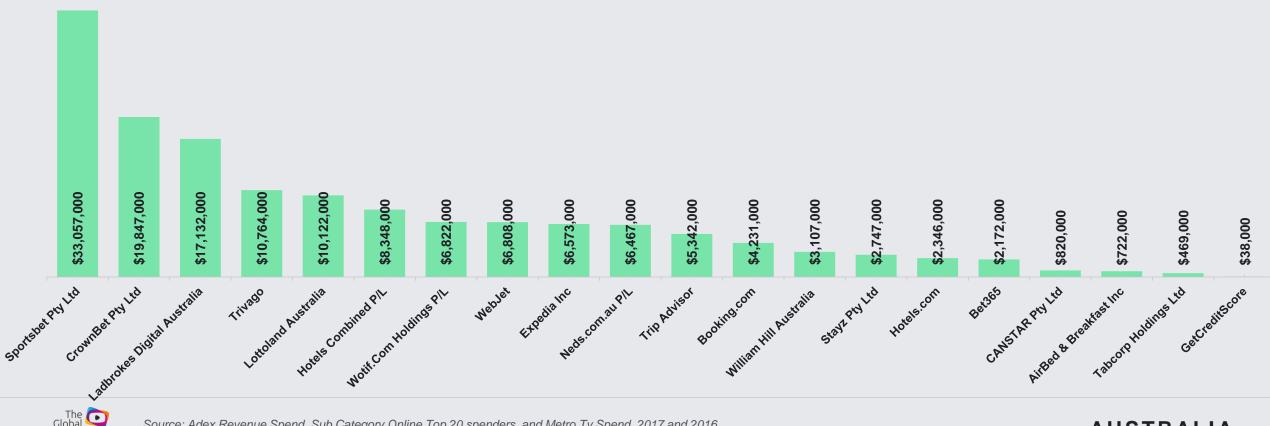
	τv	Online		
trivago	95,9%	4,1%		
vivus.es	78,3%	6,9%		
Rastreator.com	83,2%	0,3%		
mazon	79,6%	15,3%		
A Y A K	99,5%	0,5%		
hundredrooms	100,0%	0,0%		
mestic	92,6%	0,1%		
<b>room</b> prive <b>•com</b>	99,7%	0,3%		

Κ

show

SPAIN

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

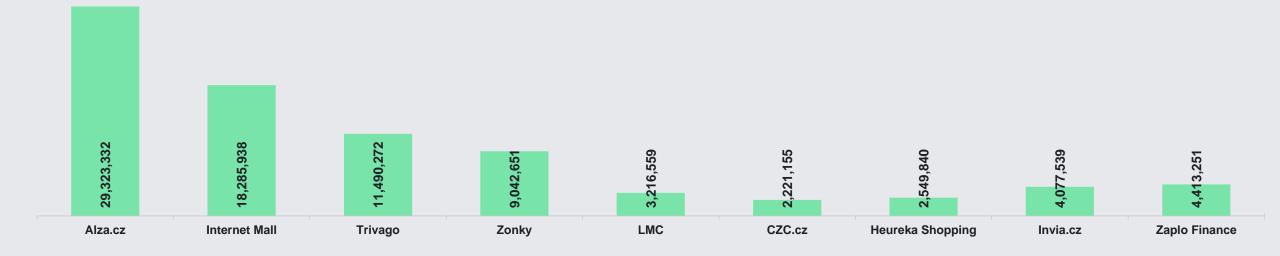


Source: Adex Revenue Spend, Sub Category Online Top 20 spenders, and Metro Tv Spend, 2017 and 2016

TV Group

#### **AUSTRALIA**

€ 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.



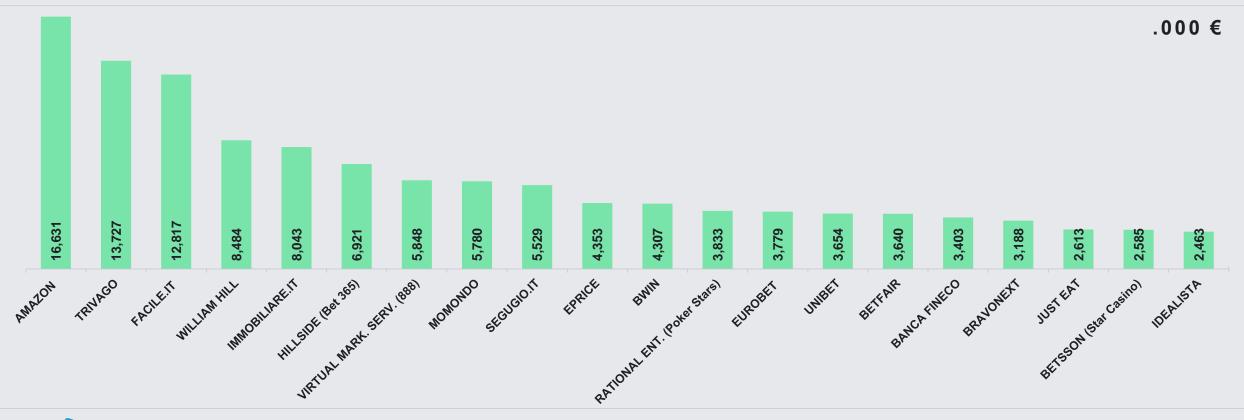


#### CZECH REPUBLIC

€ 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.



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.



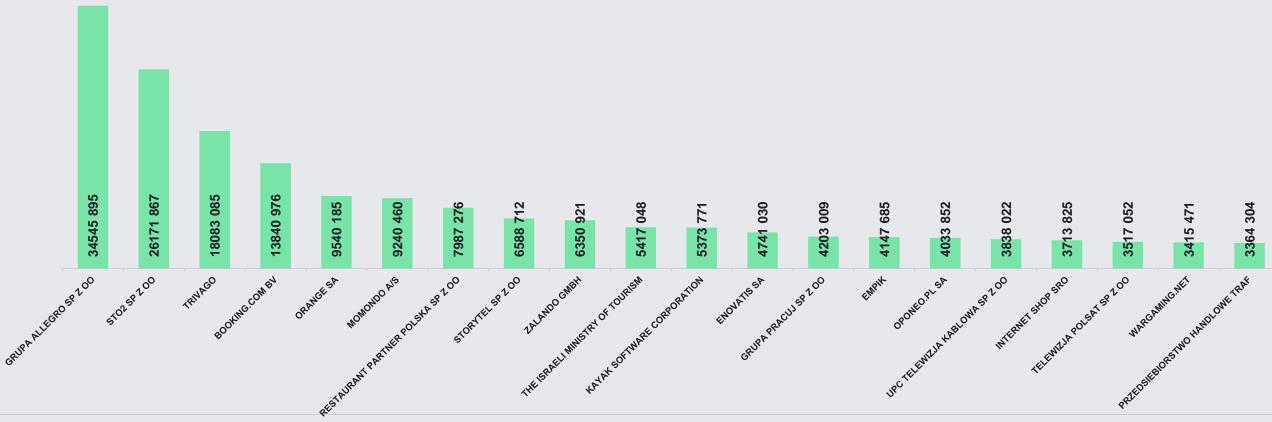




Source: Nielsen IBOPE Mexico; ADSPEND Jan – Dec 2017 Estimated investment Figures in Euro (Value of the Euro on 08/17/2018 - (0.047 pesos))



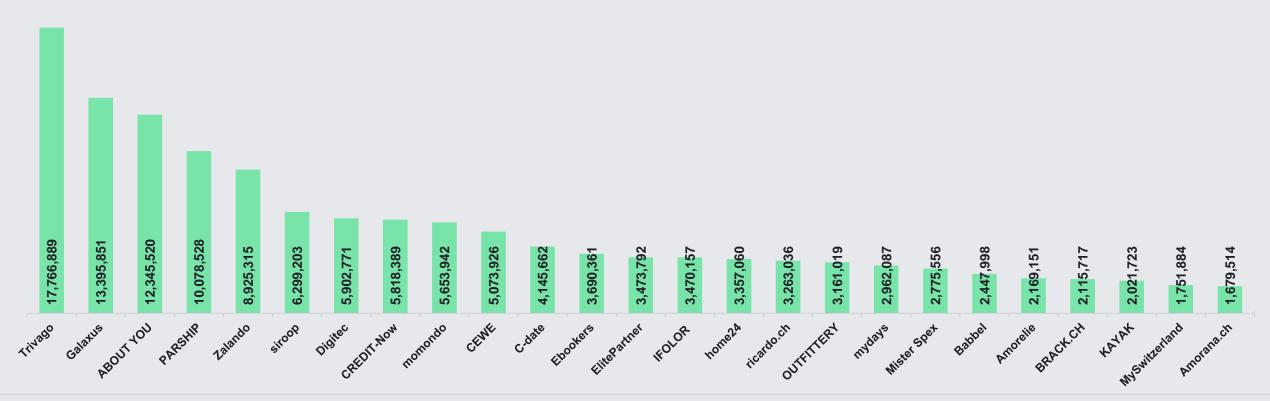
€ 178M gross is the amount invested in TV advertising by the top 20 pure player advertisers in 2017, compared to € 73M in 2013.





POLAND

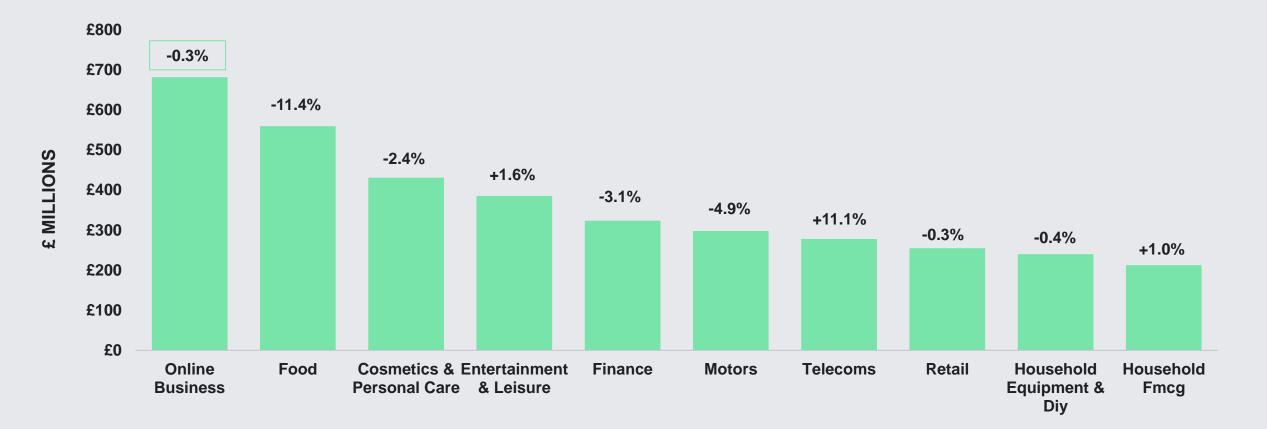
2017: +40% more spendings by the top 25 pure player advertisers in TV than 2014 (€ 112 M vs. 84 M)





#### SWITZERLAND

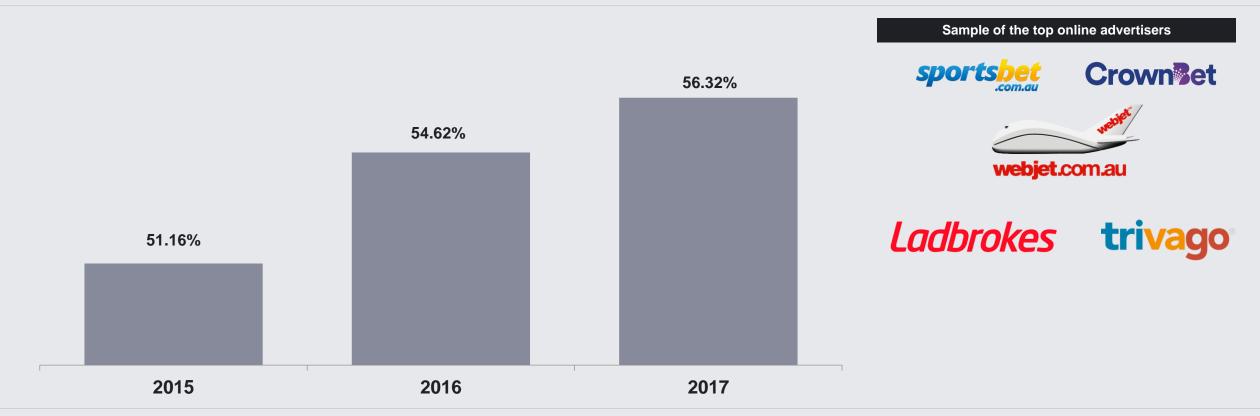
### Online businesses are the biggest investors in TV





### 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.





Source: Adex Revenue Spend, Sub Category Online Top 20 spenders, and Metro Tv Spend, % of Total Spend 2017, 2016 and 2015

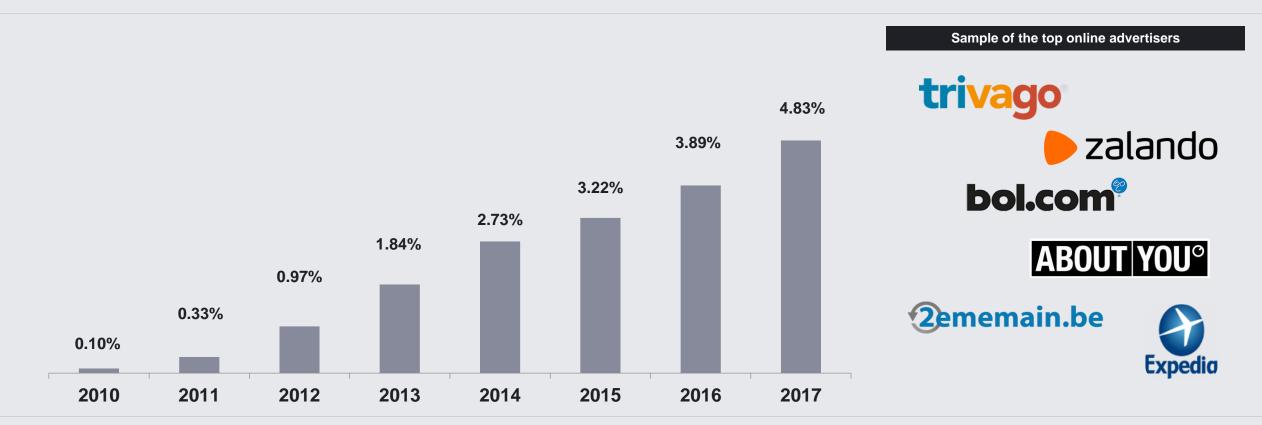
AUSTRALIA

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





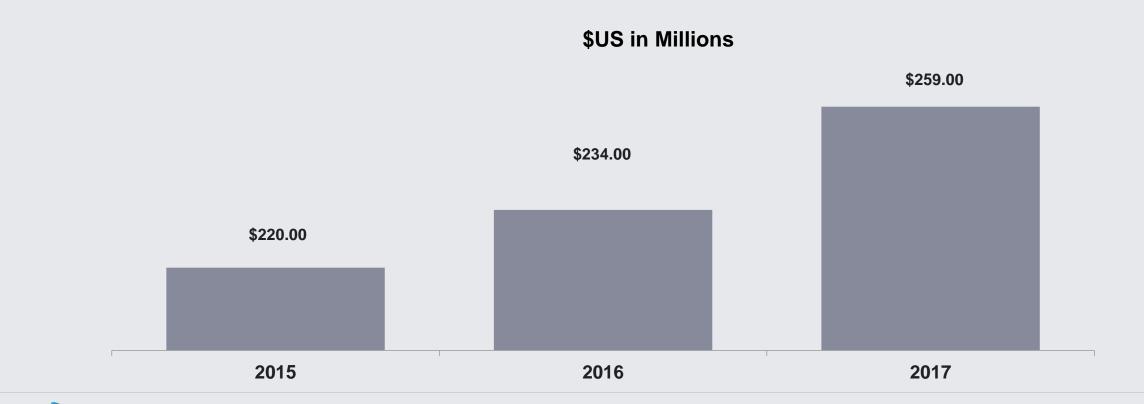
The share of TV within the total media adspend of online players has been increasing constantly since 2010.





### 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.

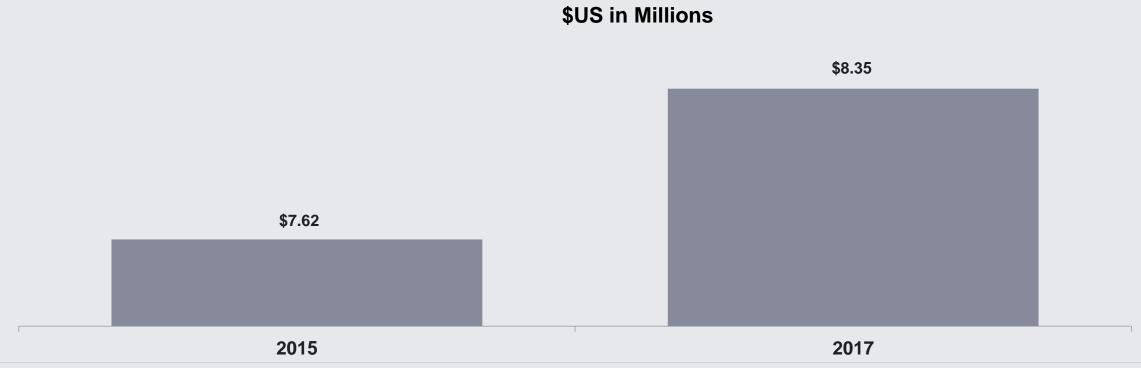


Global Source: IBOPE TV Group December/2017

Source: IBOPE Monitor Evolution - Gross investments in Reais (R\$) converted to dollar of the month of display. January 2015 to December/2017. Total TV (Broadcast + Cable + TV product placement). Applied average trading discounts.

### 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.

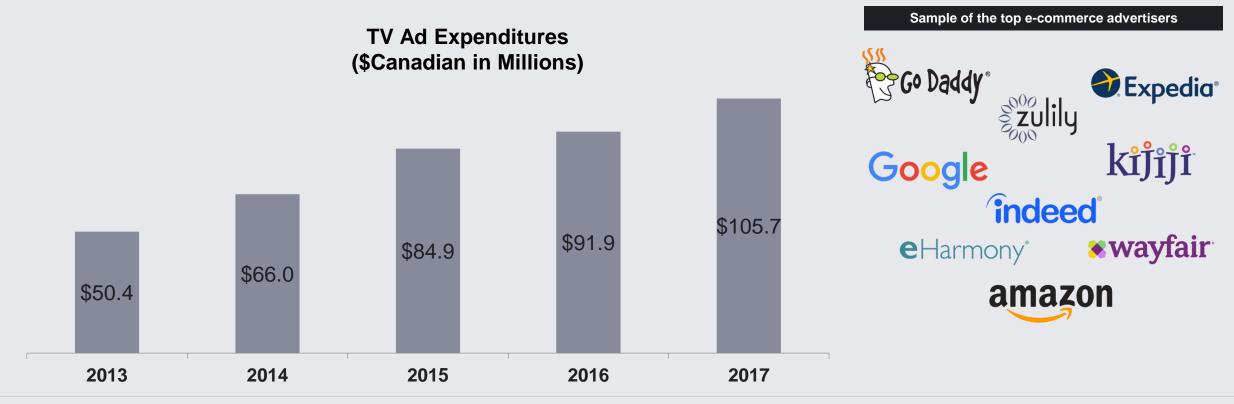




Source: IBOPE; Broadcast TV (National + Local). Gross investments in colombian pesos converted to dollar (US\$ 2,951.32).

#### COLOMBIA

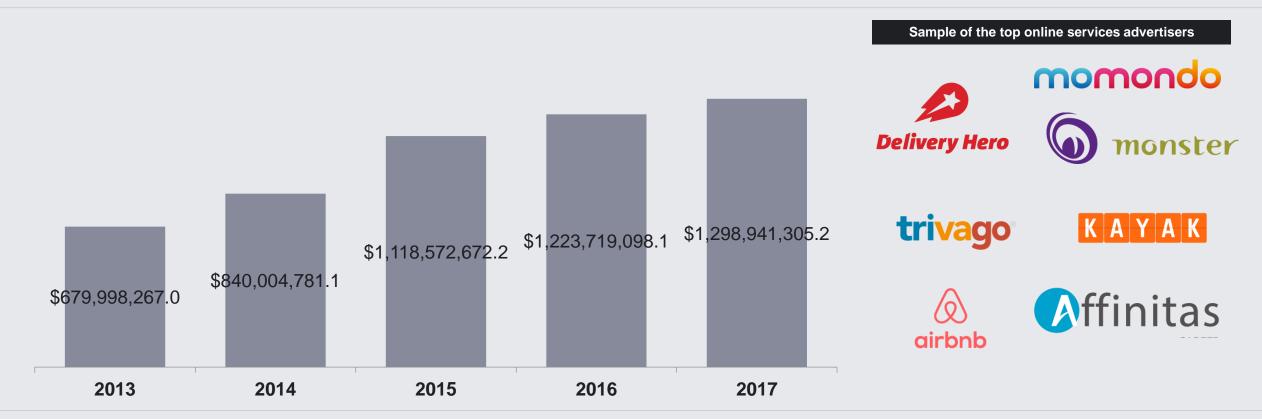
Spending in TV of online players has more than doubled over the past 5 years





Source: Ad Dynamics, National, TV Expenditures, Internet Related Sites & Services category + E-Harmony.com Inc. + Elite Singles, Expedia Inc., Indeed, Justfabulous, Priceline Group, Sunwing Travel Group, Wayfair, Web.com

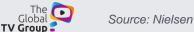
The total TV adspend of online services advertisers doubled from €680M in 2013 to € 1.3MM in 2017.





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





#### **NETHERLANDS**

#### **Online Brands spend billions on TV**

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





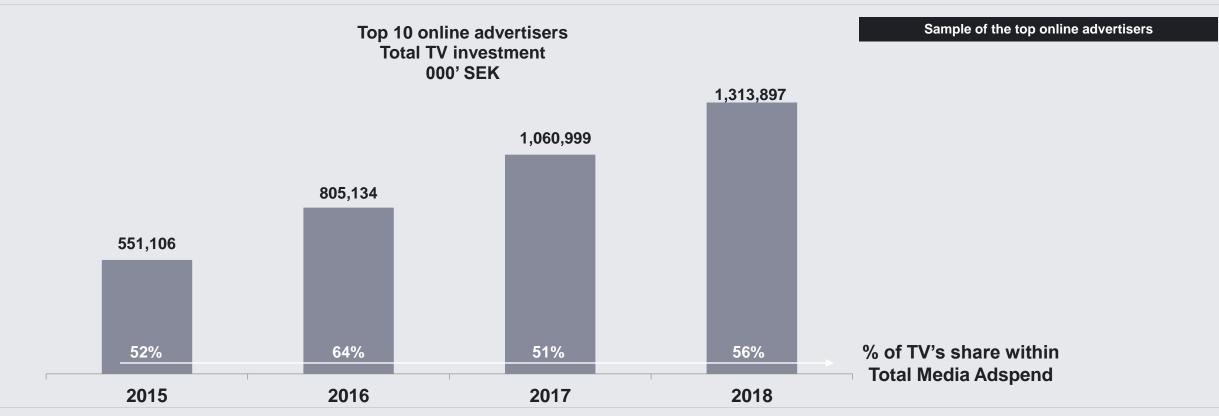
POLAND

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





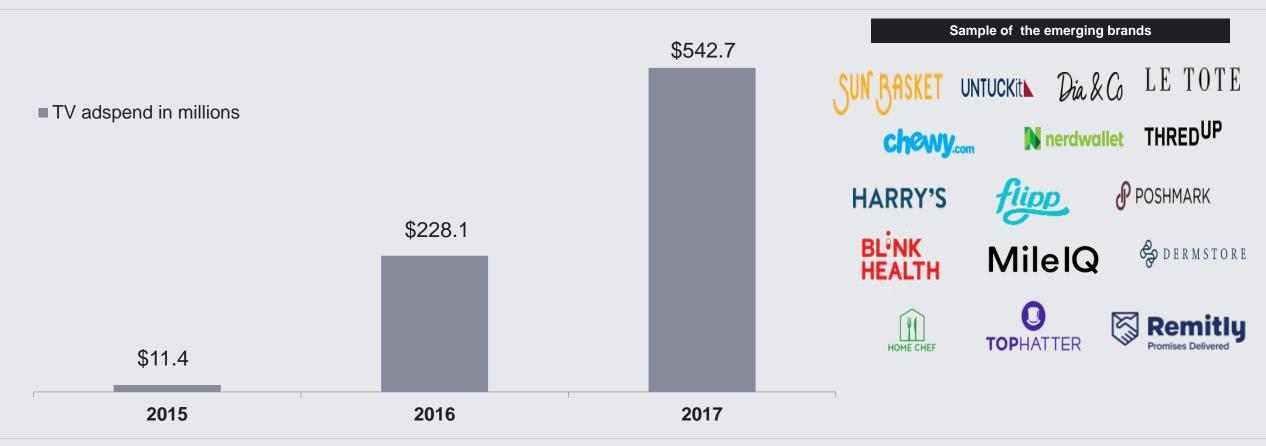
The share of TV within the total media adspend of online players has been increasing constantly since 2015.





# 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

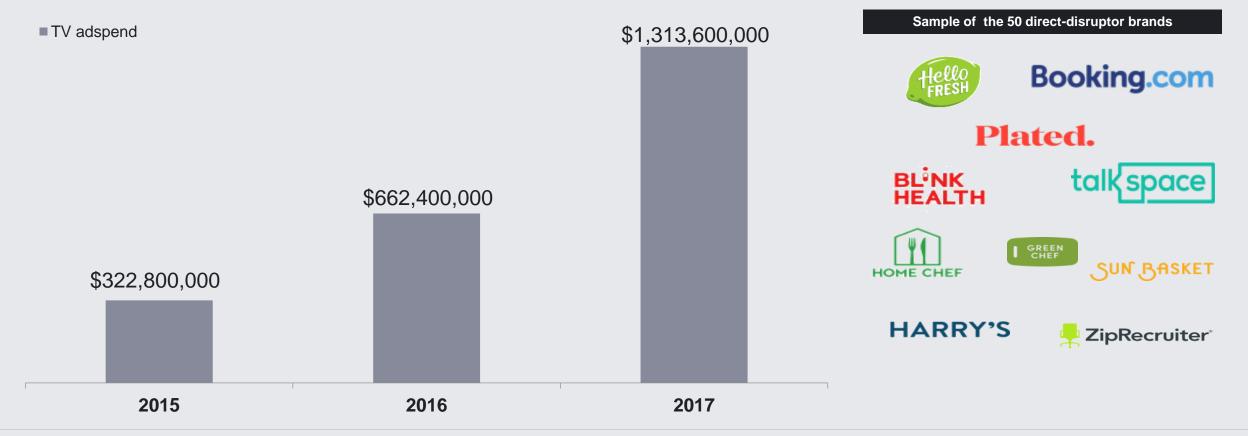




Source: VAB analysis of Nielsen Ad Intel data, calendar year 2015-2017. TV spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV, spot TV, syndication TV. Reflects the cume TV spend of the 50 direct brands identified in this report. All 50 companies existed since 2015, except for Hubble, which was founded in 2016.

# 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

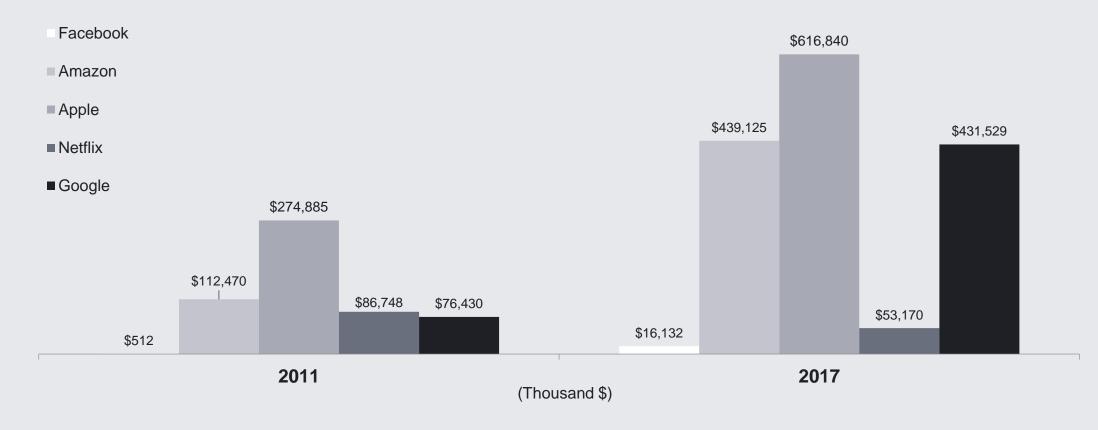




Source: VAB analysis of Nielsen Ad Intel data, calendar year 2015-2017. TV spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV, spot TV, syndication TV. Reflects the cume TV spend of the 50 direct brands identified in this report. All 50 companies existed since 2015, except for Hubble, which was founded in 2016.

### 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





Source: Nielsen Ad Intel. TV spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV, spot TV, syndication TV. Reflects all monitored TV spend by parent company; Google includes YouTube.

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

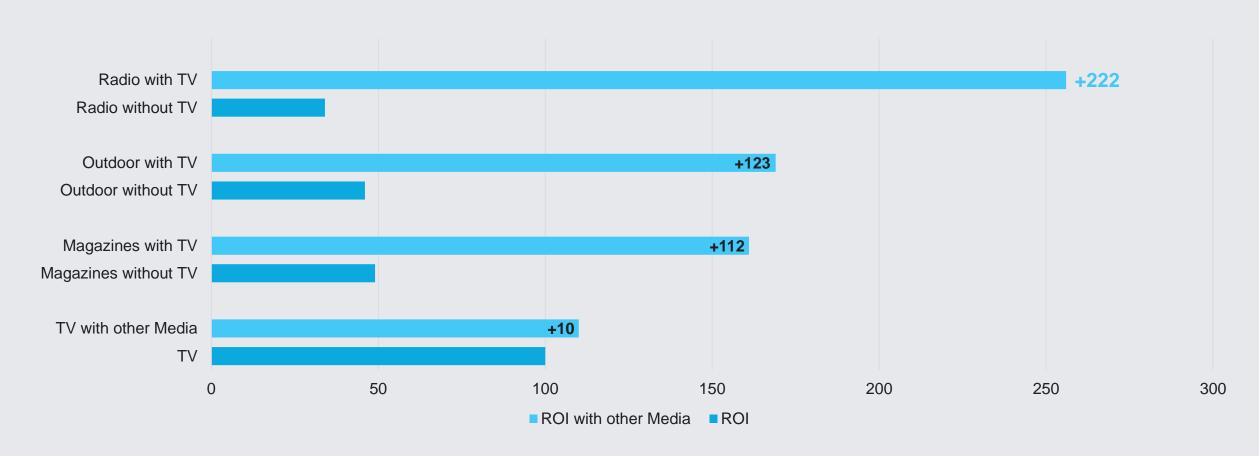
тν	Online	SEM	Social	Newspapers	Radio	Magazines	Outdoor	Cinema
93%	100%	98%	88%	75%	73%	69%	50%	0%



Source: Source: Dagmar & Screenforce Finland – Tv Advertising Effectiveness Study (Dagmar econometric sales models 2012 – 2016).

#### **TV boosts other media**

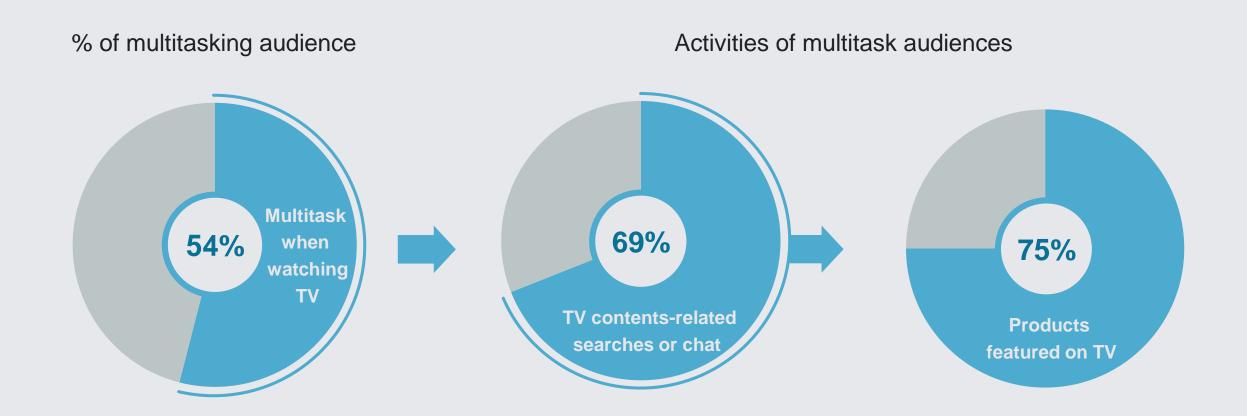
Average ROI per Medium, Mono- versus Mix with TV, Index\*





GERMANY

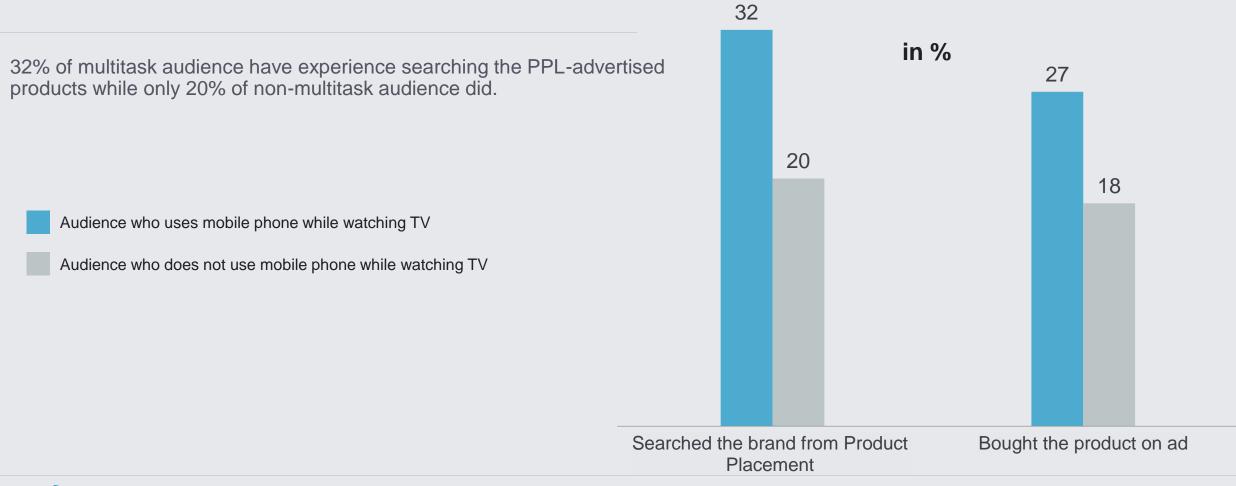
### Multiplatform TV's halo impacts advertisers' ROI





#### SOUTH KOREA

#### For multitasking audiences, Product Placement directly affect the sales

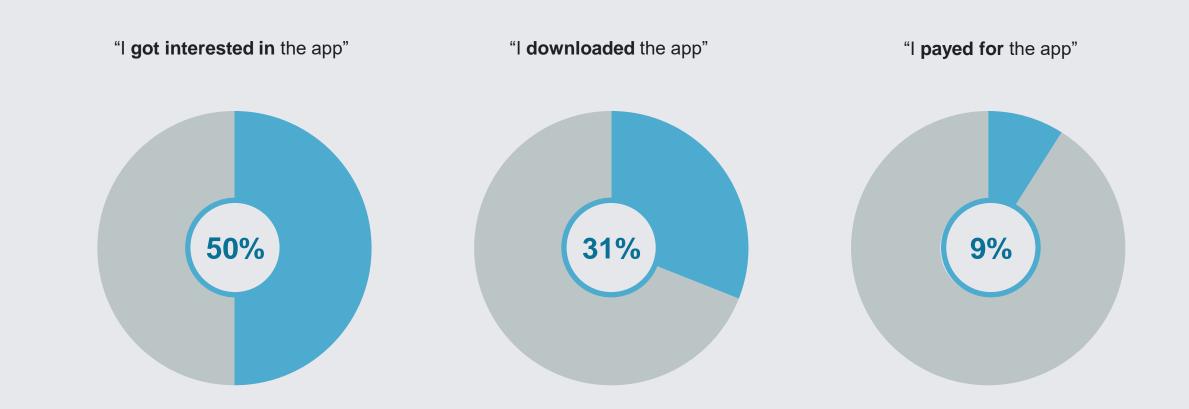


The Global TV Group

#### SOUTH KOREA

#### TV ads lead to mobile app download

Attitude of multitasking TV audience towards mobile app ads

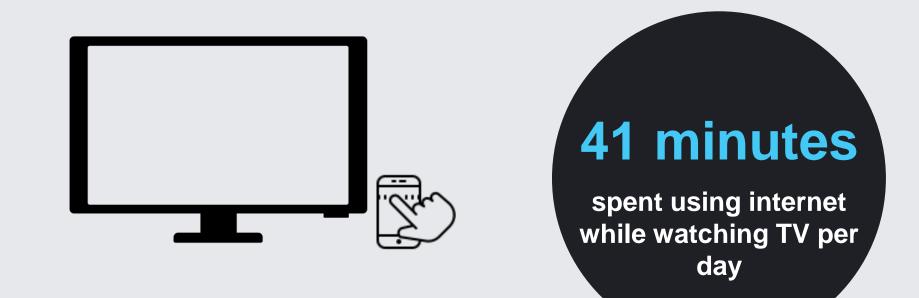




Source: KOBACO "2016 Media & Consumer Research", Base : multitask audiences who watching mobile app advertisement; n = 1,533

SOUTH KOREA

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





#### 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



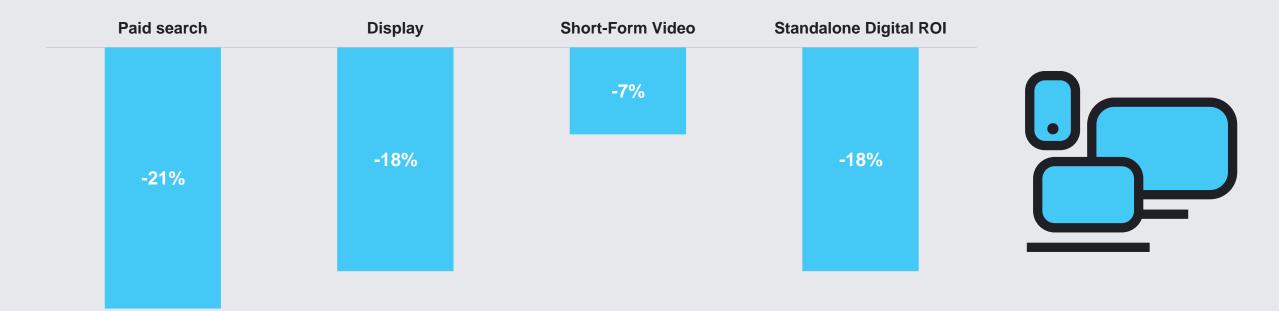


#### Multiplatform TV's halo impacts Digital ROI

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

4,834.5 1,943.4 1,096.1 991.0 791.9 698.9 693.4 651.1 415.5 108.5 107.0 81.3 62.9 61.7 34.7 32.1 20.7 20.5 16.7 13.5 3.1 TV Brands Twitch Yahoo Reddit WhatsApp VEVO LinkedIn AOL Pinterest YouTube Spotify Facebook Pandora Snapchat Google Instagram Messenger Twitter Amazon Buzzfeed eBav Ś G In 0 vevo **Duff** Y Aol. amazon ebav Pinterest PANDORA You Tube Spotif



Source: comScore MediaMetrix Key Measures (multiplatform), February 2018; A18-34 Nielsen R&F Time Period Report, Live + SD, Total Day. February 1-28, 2018; A18-34. "Average Audience" is based on the average minute, which is factored across the full month for websites and TV. TV Brands include linear TV and TV-related websites. Digital website measurement includes all visitor activity, not just video consumption.

#### 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)







