



The Global TV Deck

The global proof of TV's power and popularity

www.theglobaltvgroup.com



Background: 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.

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 a class apart in the video world



High completion rates



Robust measurement



Full Screen



Brand safe and pre-cleared ads



Sound on



Shared viewing







Viewed by humans



Broadcasters spent billions on high quality TV 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

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

“More targeting is positive, but it is important not to lose sight of the **power that television has as a broadcast medium** for one message to everyone.”

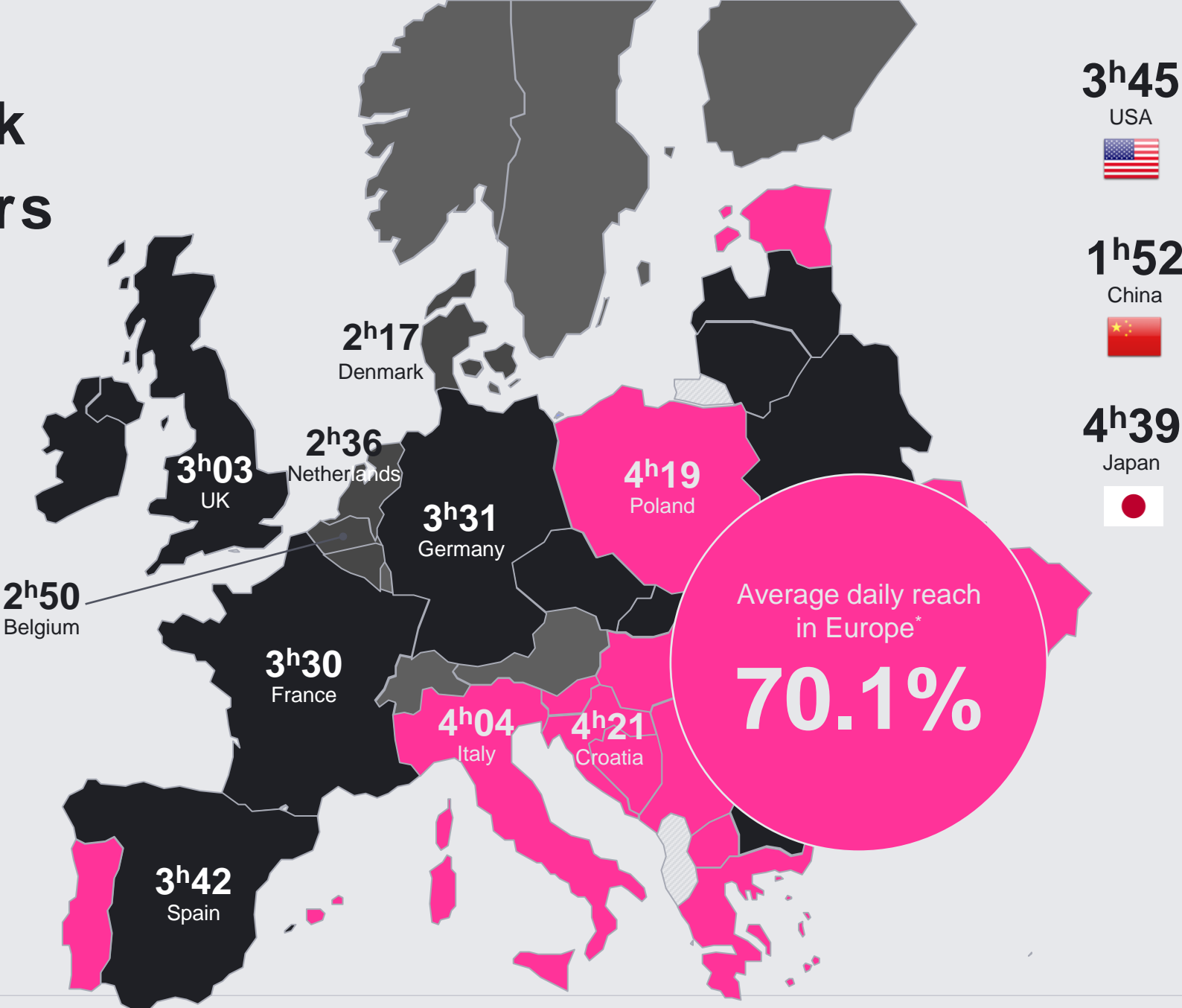
Andy Pilkington, Media Director, Europe at Adidas

December 2019

TV is the fast track to reach consumers

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

Daily Viewing Time
3h39
+30 min
vs 1993



3h45
USA

1h52
China

4h39
Japan

Average daily reach in Europe*
70.1%

Unbeatable daily, weekly and monthly reach

% of the Argentinean population



62.9%



86.1%



95.0%

Unbeatable daily, weekly and monthly reach

% of the Australian population



55.2%



75.6%



89.1%

Unbeatable daily, weekly and monthly reach

% of the Austrian population



66.5%



89.7%



97.4%

Unbeatable daily, weekly and monthly reach

% of the North Belgian population



71.1%



91.8%



98.3%

Unbeatable daily, weekly and monthly reach

% of the South Belgian population



67.3%



89.5%



98.1%

Unbeatable daily, weekly and monthly reach

% of the Canadian population



78%



92%



98%

Unbeatable daily, weekly and monthly reach

% of the Chilean population



36.5%



77.4%



93.2%

Unbeatable daily, weekly and monthly reach

% of the Colombian population



70.9%



87.0%



97.7%

Unbeatable daily, weekly and monthly reach

% of the Czech population



68.9%



88.3%



95.1%

Unbeatable daily, weekly and monthly reach

% of the Ecuadorian population



53.7%



80.5%



94.2%

Unbeatable daily, weekly and monthly reach

% of the Finnish population



66%



87%



95.6%

Unbeatable daily, weekly and monthly reach

% of the French population



71.0%



88.5%



96.7%

Unbeatable daily, weekly and monthly reach

% of the German population



69.8%



88.2%



95.2%

Unbeatable daily, weekly and monthly reach

% of the Italian population



72.0%



88.9%



95.0%

Unbeatable daily, weekly and monthly reach

% of the Irish population



61.5%



85.3%



99.5%

Unbeatable daily, weekly and monthly reach

% of the Mexican population



61.1%



87.4%



96.1%

Unbeatable daily, weekly and monthly reach

% of the Dutch population



67.6%



89.5%



95.6%

Unbeatable daily, weekly and monthly reach

% of the Peruvian population



42.1%



71.7%



91.0%

Unbeatable daily, weekly and monthly reach

% of the Polish population



59.6%



79.2%



88.9%

Unbeatable daily, weekly and monthly reach

% of the Portuguese population



84.9%



99.2%



99.7%

Unbeatable daily, weekly and monthly reach

% of the Russian population



65.8%



89.2%



98.1%

Unbeatable daily, weekly and monthly reach

% of the Slovenian population



70.9%



88.9%



96.3%

Unbeatable daily, weekly and monthly reach

% of the Spanish population



68.6%



88.2%



95.7%

Unbeatable daily, weekly and monthly reach

% of the Swedish population



58.6%



81.4%



91.7%

Unbeatable daily, weekly and monthly reach

% of the Swiss population



53.9%



79.4%



89.5%

Unbeatable daily, weekly and monthly reach

% of the British population



69.5%



90.4%



97.1%

Unbeatable daily, weekly and monthly reach

% of the Ukrainian population



65.5%



88.7%



96.4%

Unbeatable daily, weekly and monthly reach

% of the American population



64.1%



80.5%



88.9%

Resilience

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

“TV is in a naturally **strong position** as the pendulum swings back to brand building.”

Andy Pilkington, Media Director, IEurope at Adidas

December 2019

“Success depends on a fully integrated campaign... There is a time and a place for targeting through the obvious channels, digital and CRM, but there is also a **time to talk to the nation** and our TV campaigns do that brilliantly and successfully.”

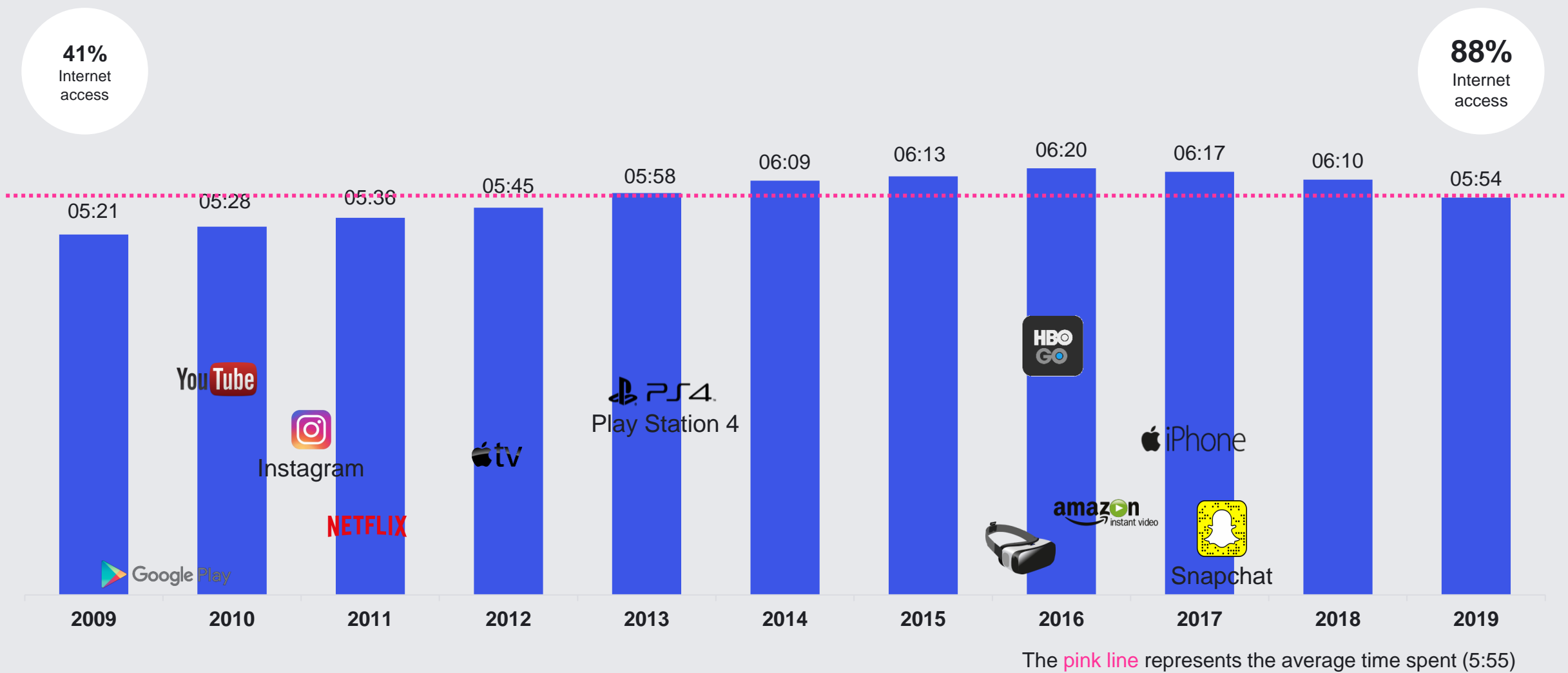
Ian Hampton, Senior Campaigns Manager NHS England

October 2019

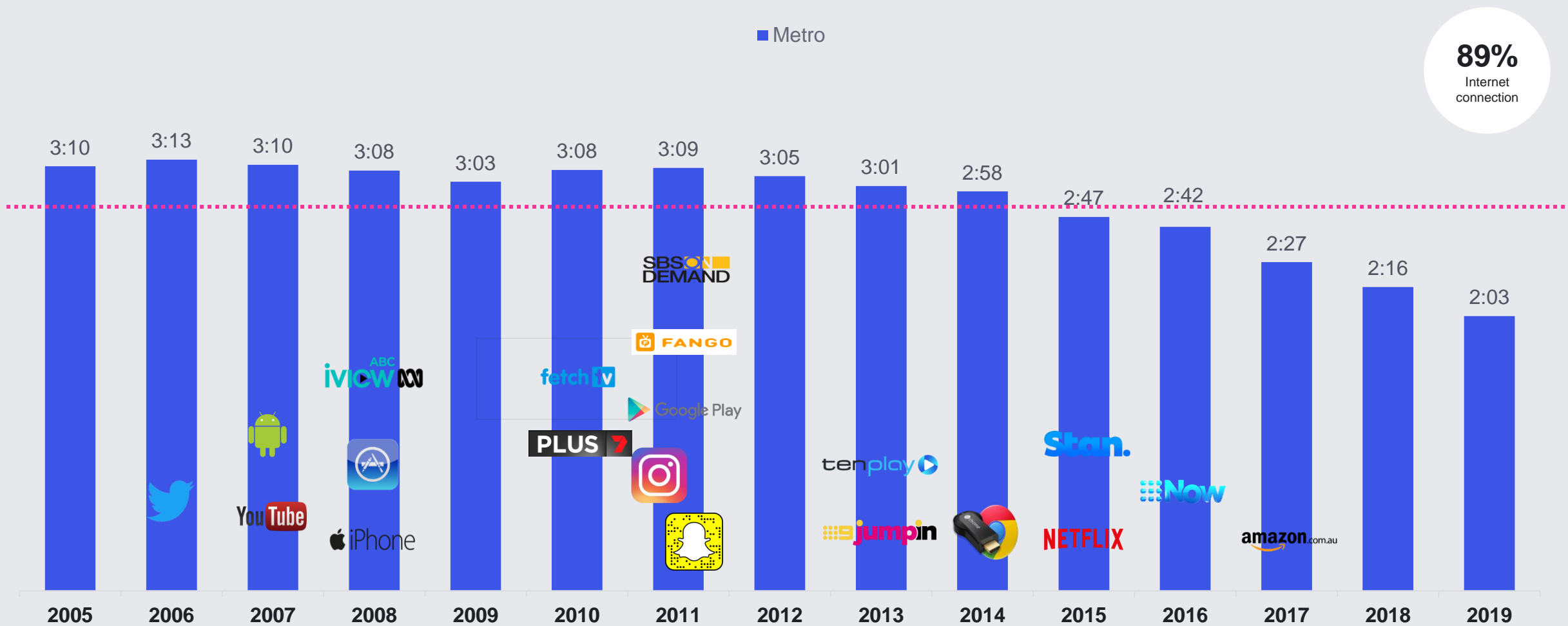
**Despite a decade of
potential disruptions,
TV viewing on a TV set
has remained
remarkably stable**



TV's resilience: Hours of Linear TV viewed on a TV set per day

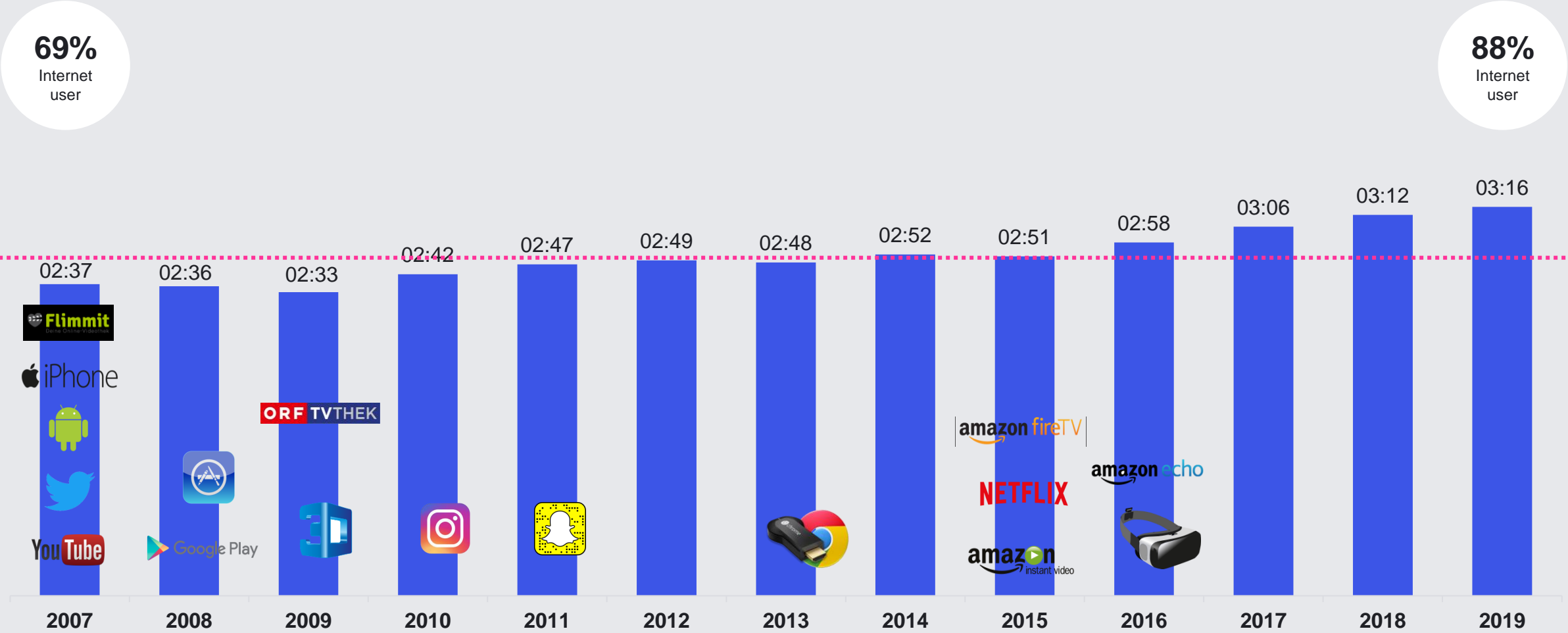


TV's resilience: Hours of Linear TV viewed on a TV set per day



The pink line represents the average time spent (2:53)

TV's resilience: Hours of Linear TV viewed on a TV set per day

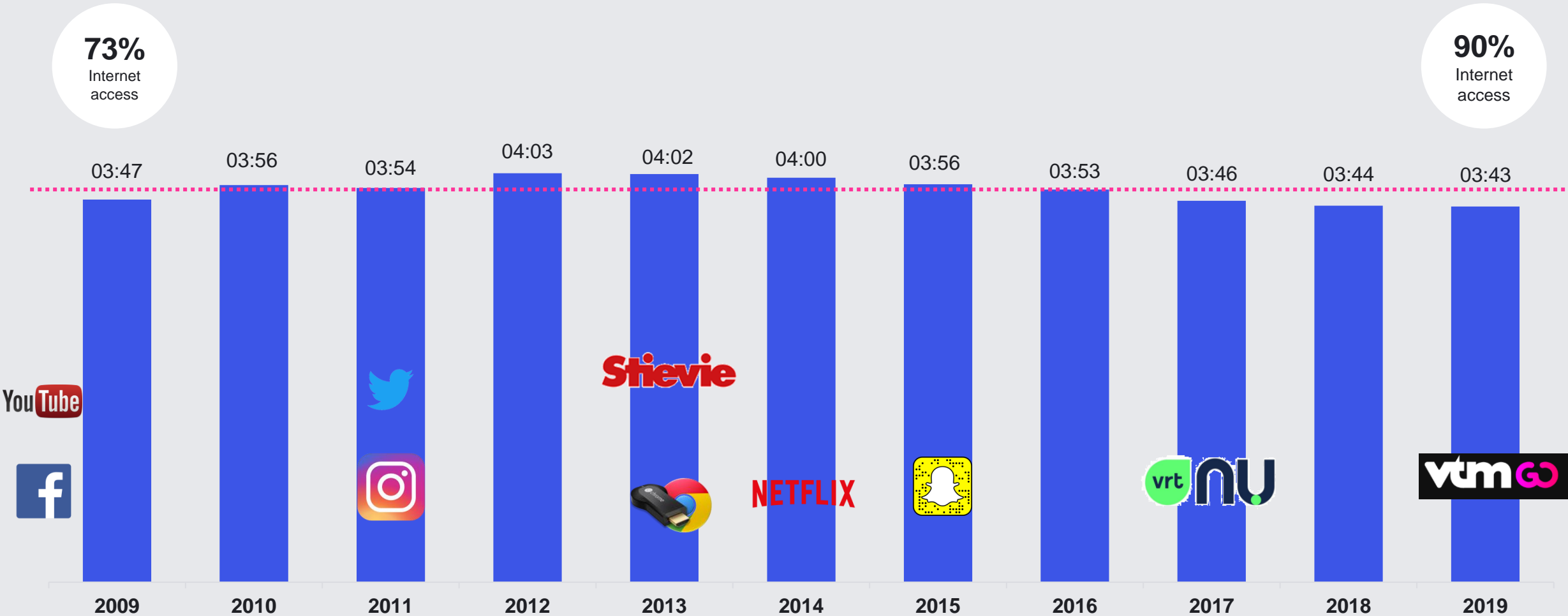


69%
Internet
user

88%
Internet
user

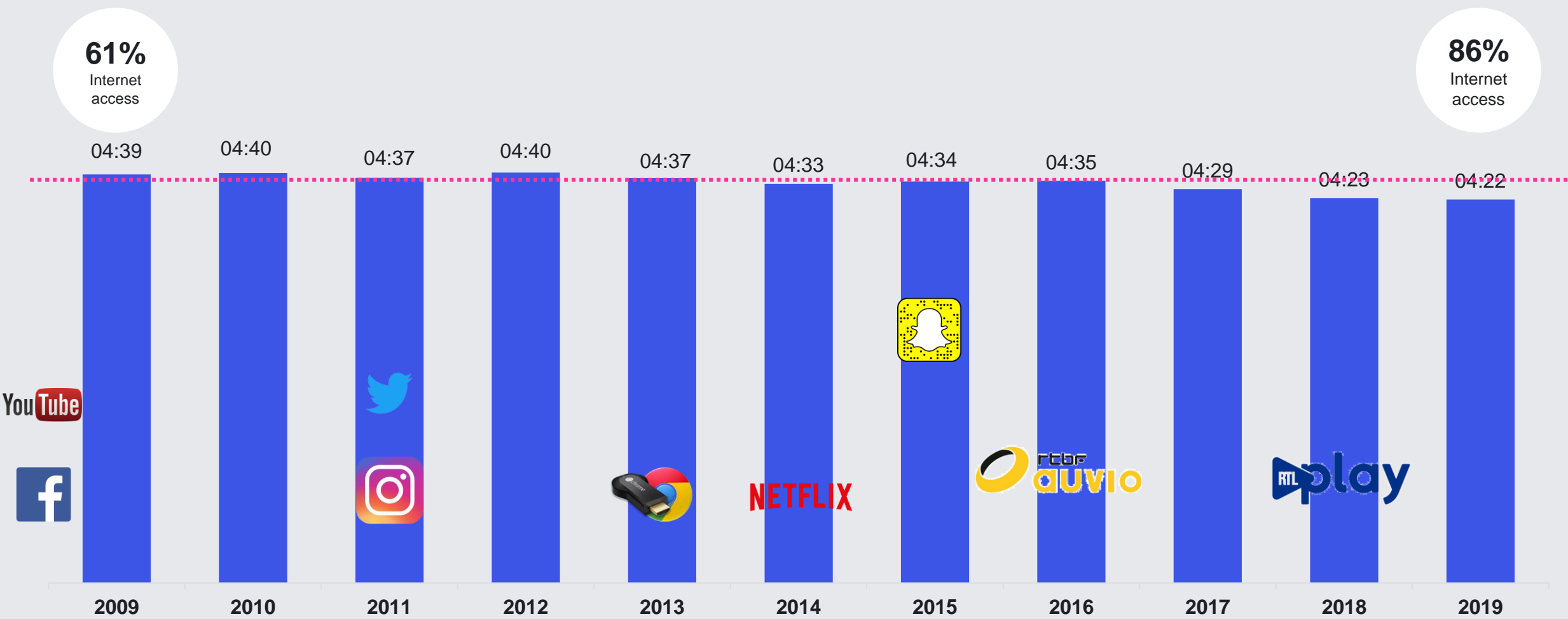
The pink line represents the average time spent (02:51)

TV's resilience: Hours of Linear TV viewed on a TV set per day



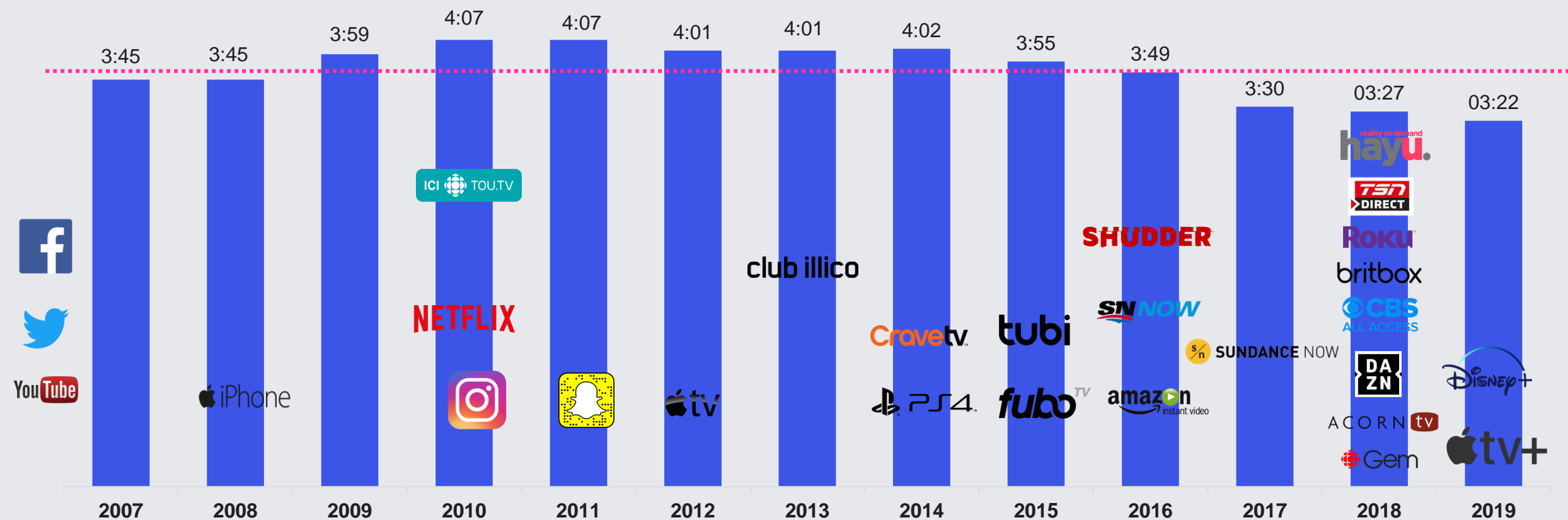
The pink line represents the average time spent (03:53)

TV's resilience: Hours of Linear TV viewed on a TV set per day



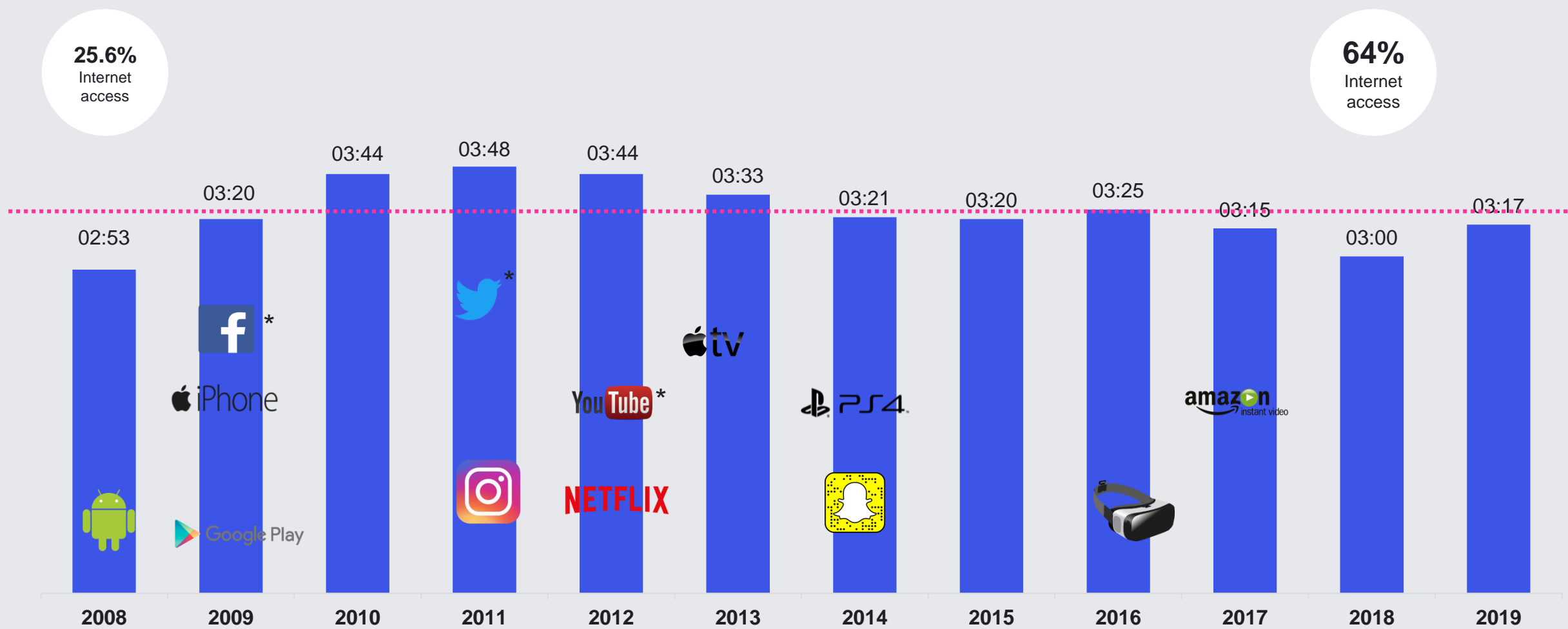
The pink line represents the average time spent (04:34)

TV's resilience: Hours of Linear TV viewed on a TV set per day



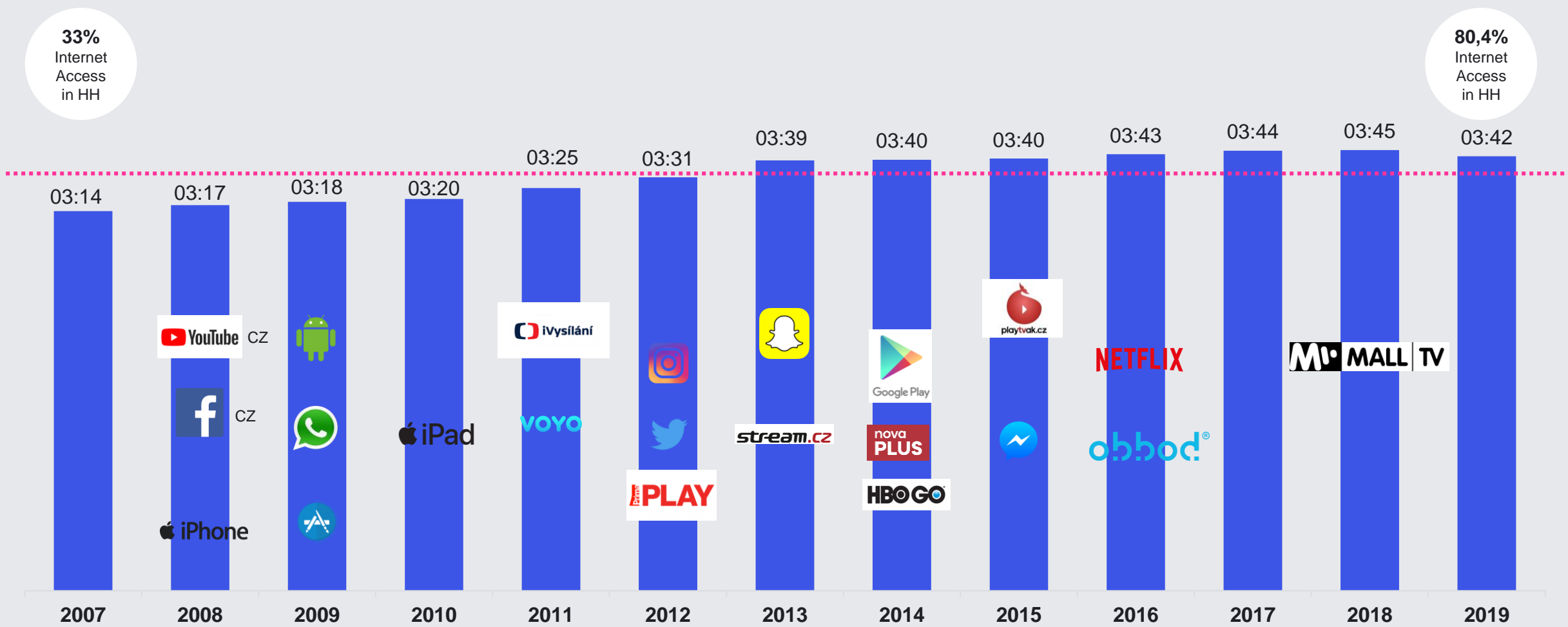
The pink line represents the average time spent (03:50)

TV's resilience: Hours of Linear TV viewed on a TV set per day



The pink line represents the average time spent (03:23)

TV's resilience: Hours of Linear TV viewed on a TV set per day

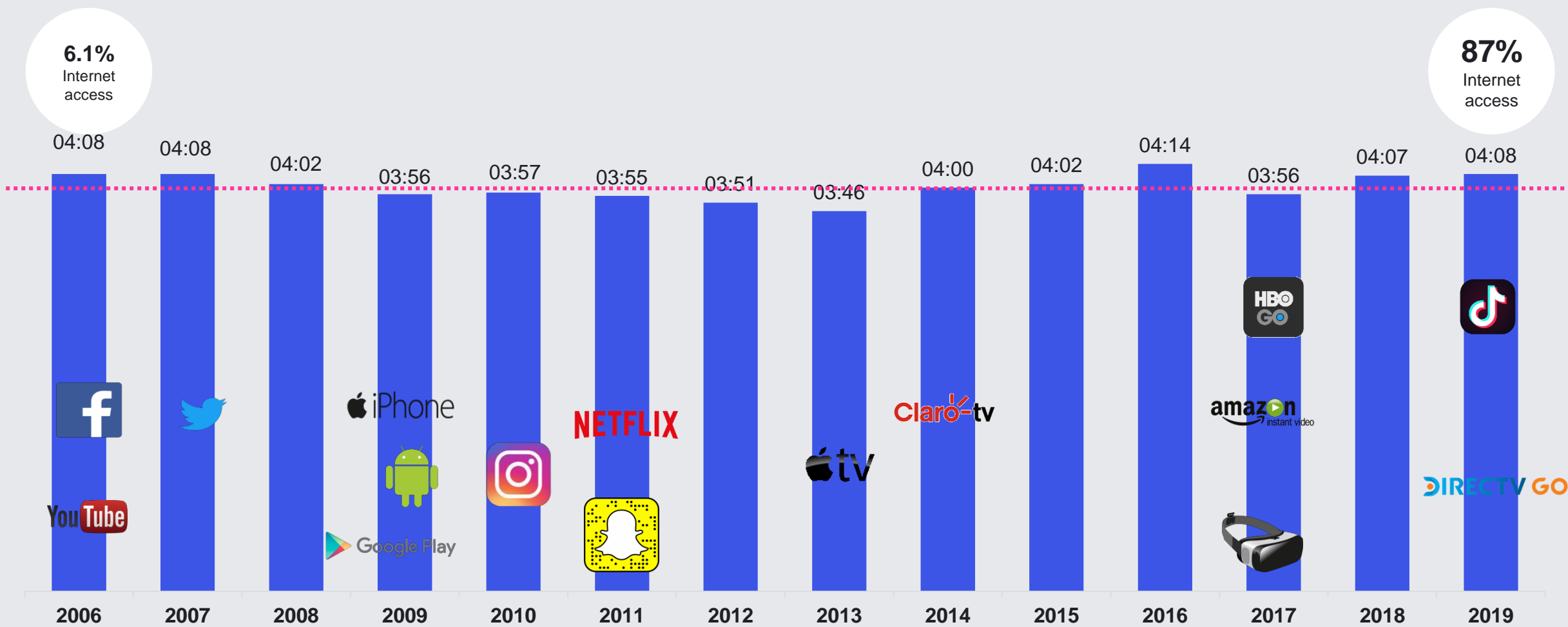


33%
Internet
Access
in HH

80,4%
Internet
Access
in HH

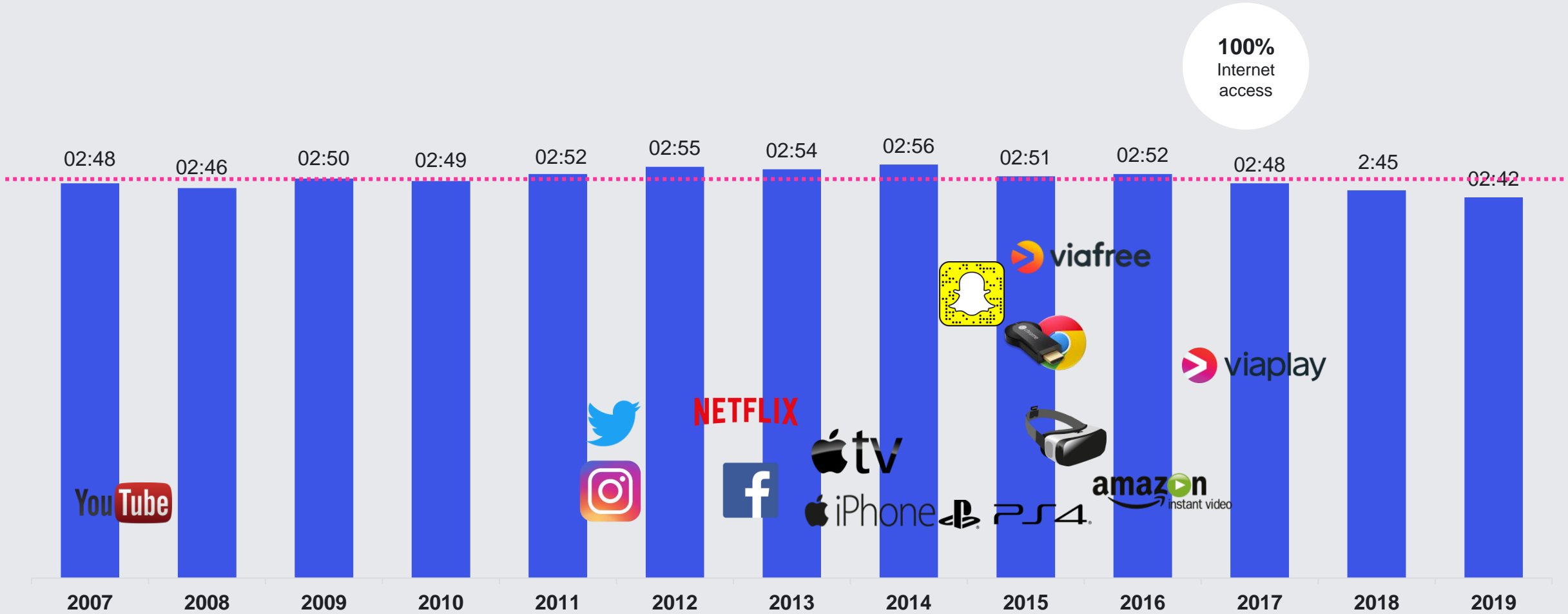
The pink line represents the average time spent (03:32)

TV's resilience: Hours of Linear TV viewed on a TV set per day



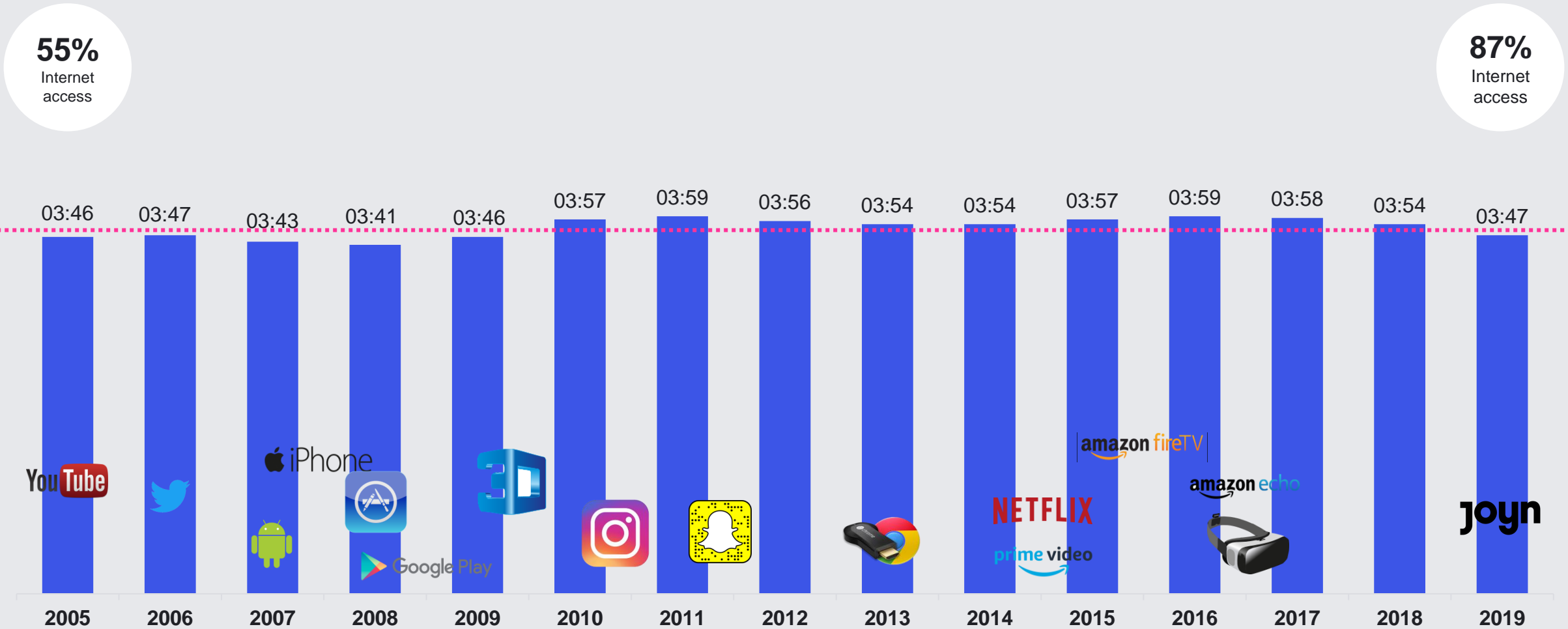
The pink line represents the average time spent (04:00)

TV's resilience: Hours of Linear TV viewed on a TV set per day



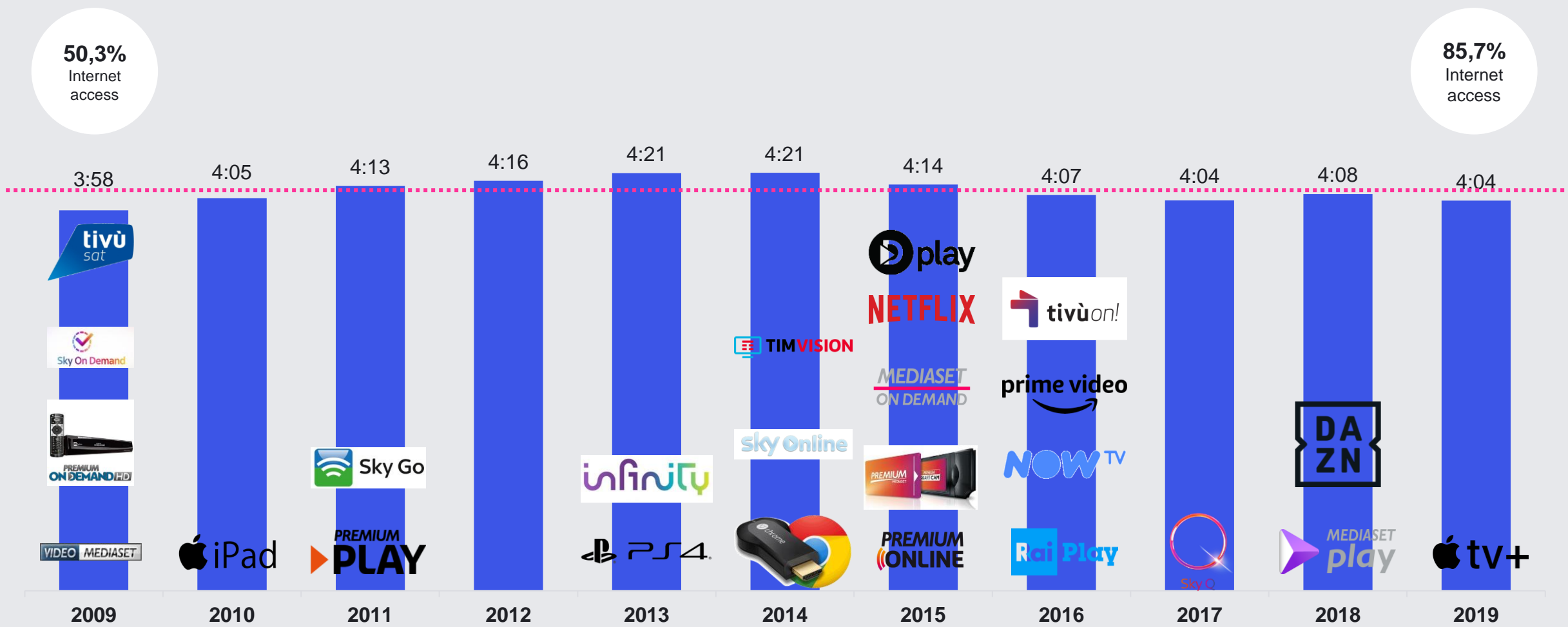
The pink line represents the average time spent (02:50)

TV's resilience: Hours of Linear TV viewed on a TV set per day



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

TV's resilience: Hours of Linear TV viewed on a TV set per day

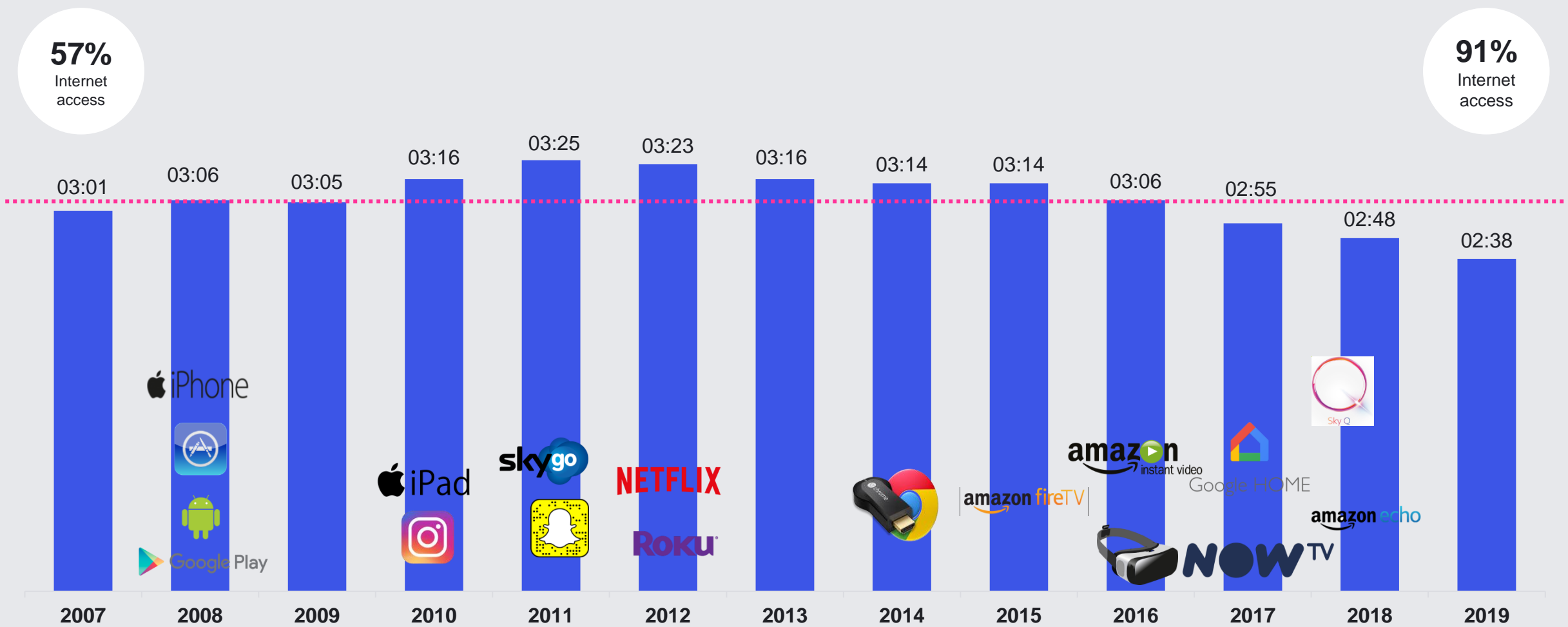


50,3%
Internet
access

85,7%
Internet
access

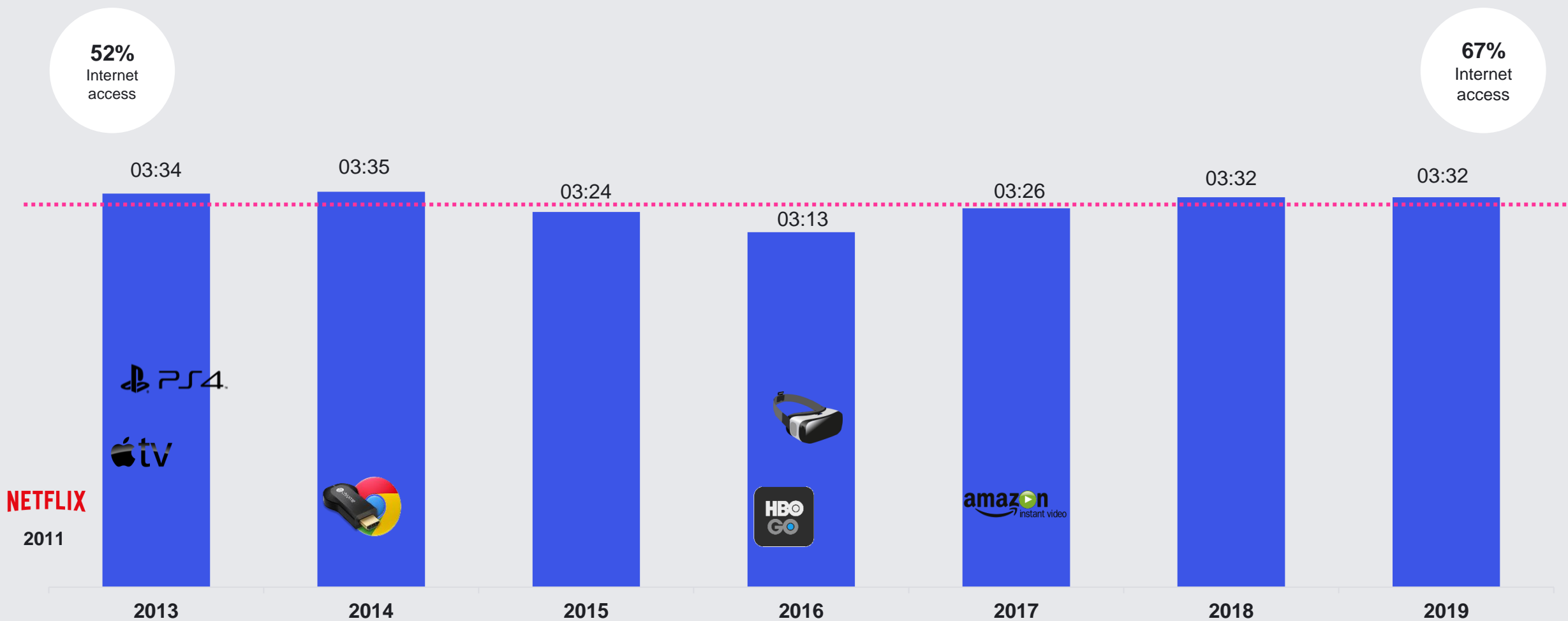
The pink line represents the average time spent (04:10)

TV's resilience: Hours of Linear TV viewed on a TV set per day



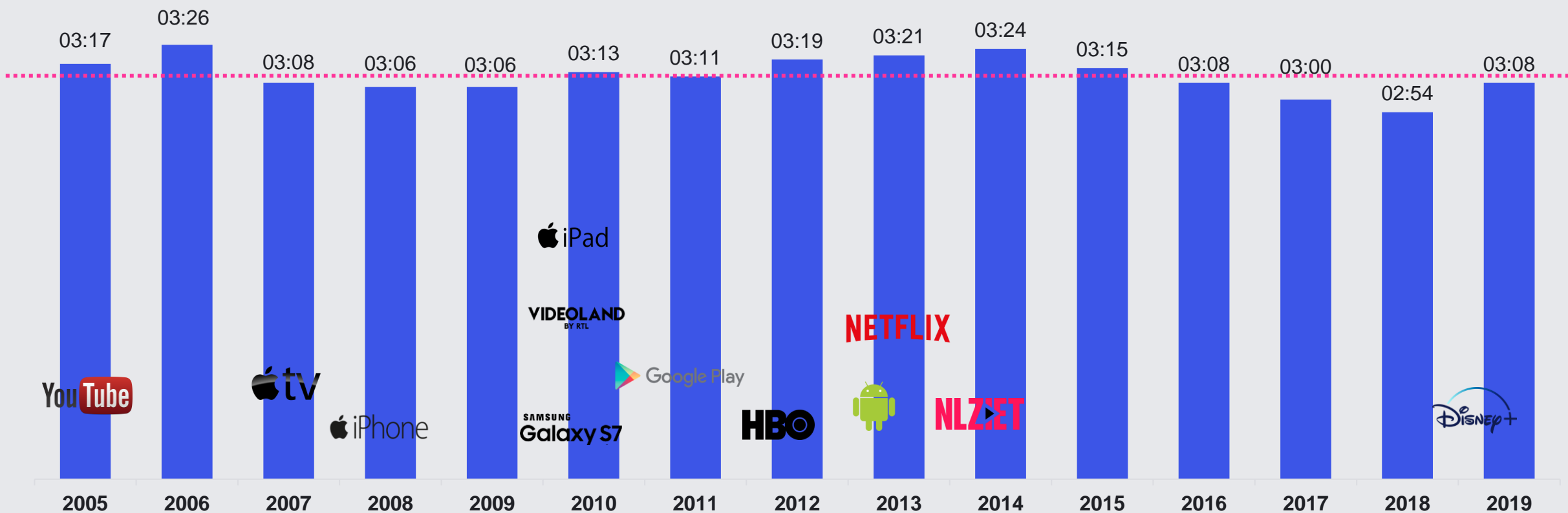
The pink line represents the average time spent (03:06)

TV's resilience: Hours of Linear TV viewed on a TV set per day



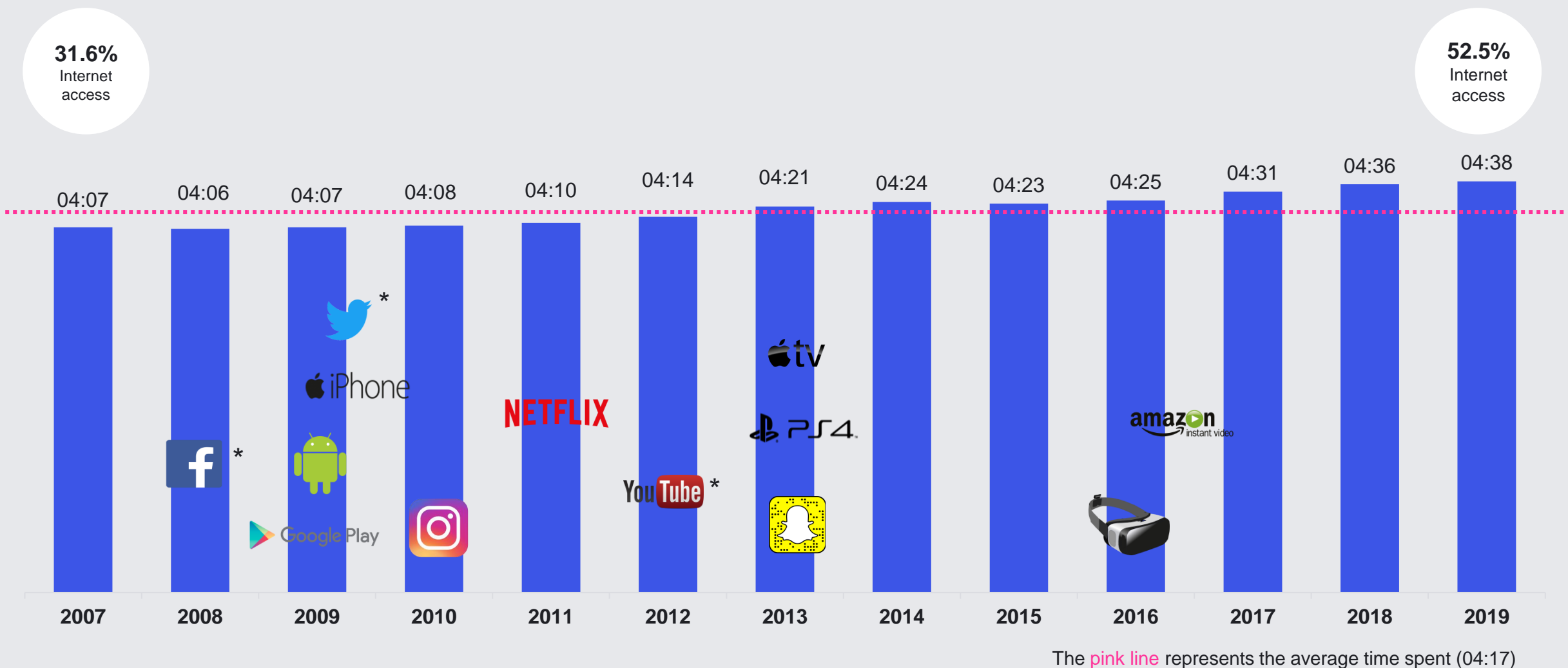
The pink line represents the average time spent (3:28)

TV's resilience: Hours of Linear TV viewed on a TV set per day

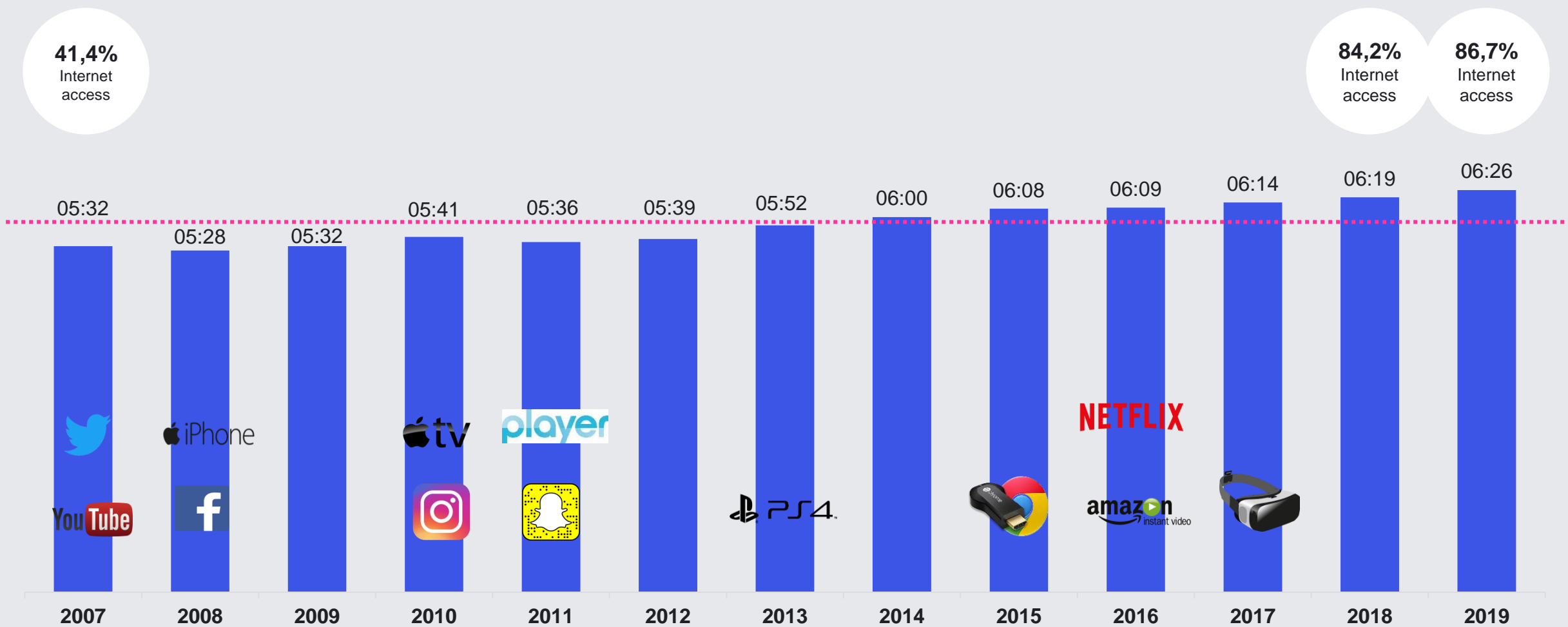


The pink line represents the average time spent (03:11)

TV's resilience: Hours of Linear TV viewed on a TV set per day

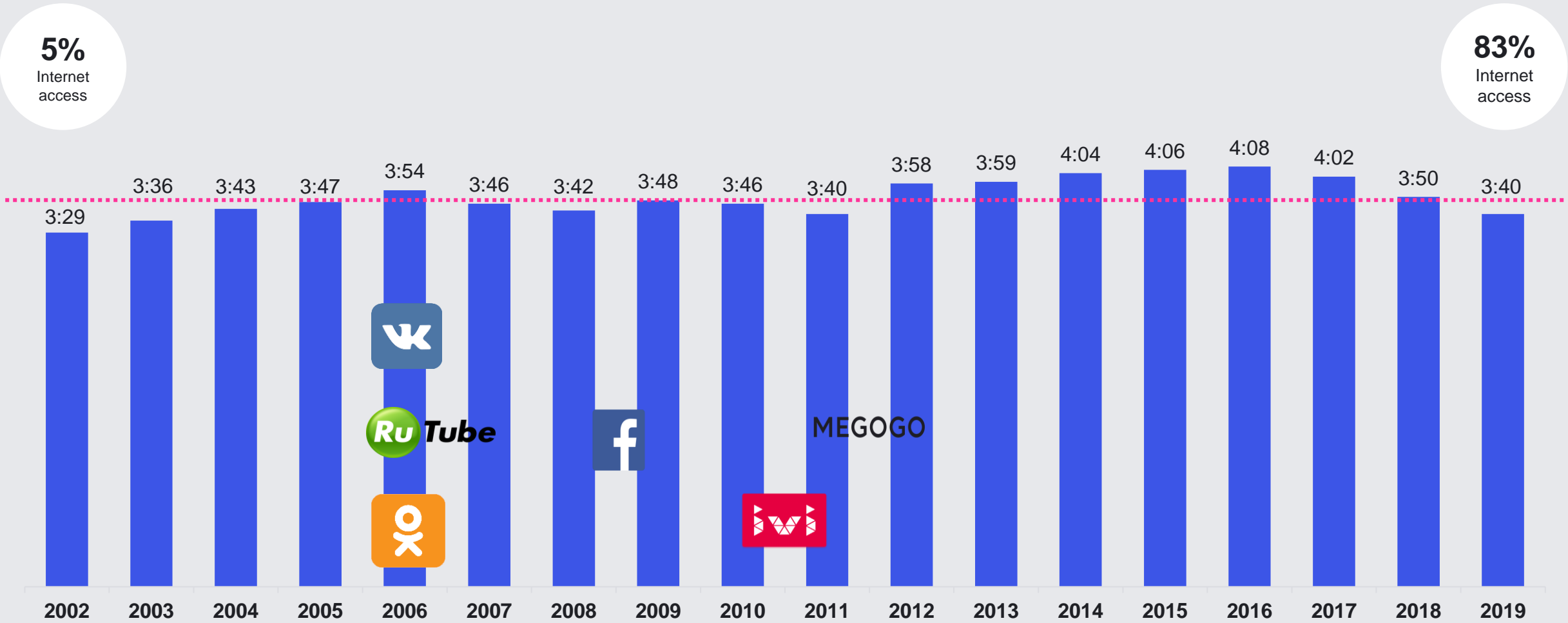


TV's resilience: Hours of Linear TV viewed on a TV set per day



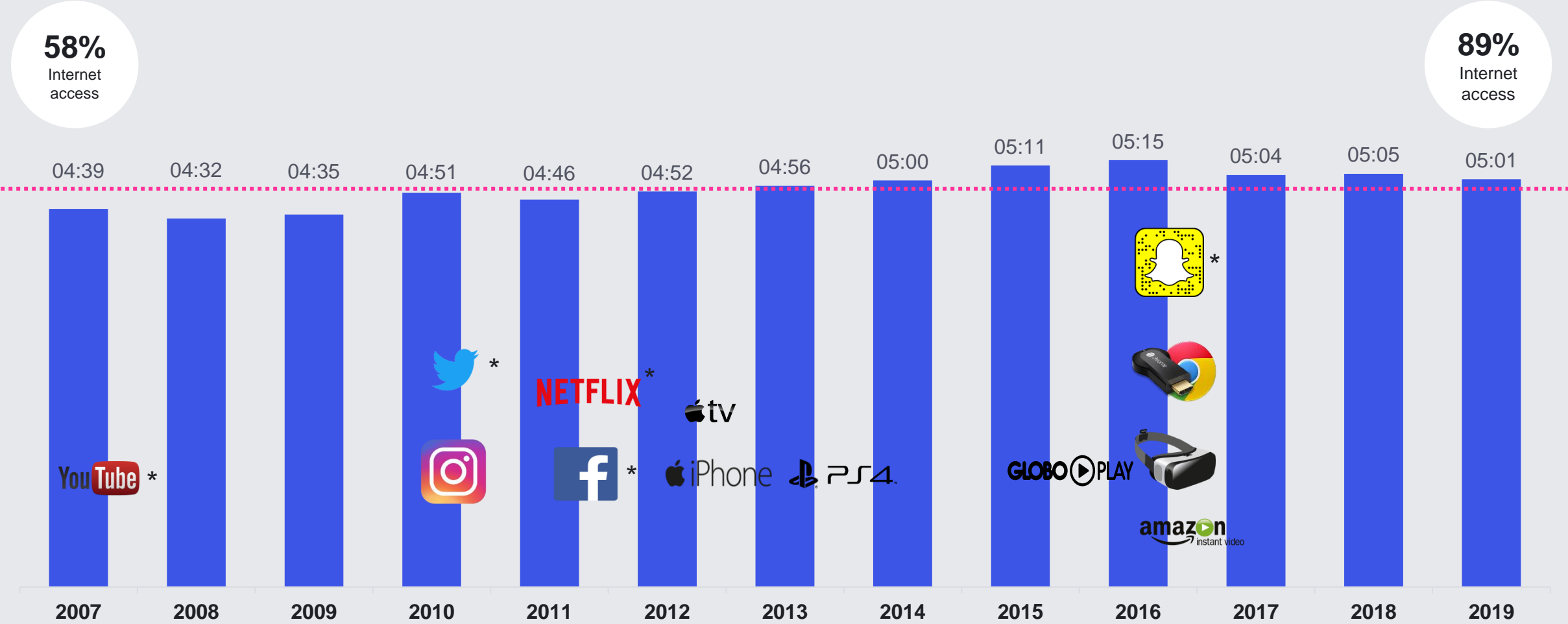
The pink line represents the average time spent (05:53)

TV's resilience: Hours of Linear TV viewed on a TV set per day

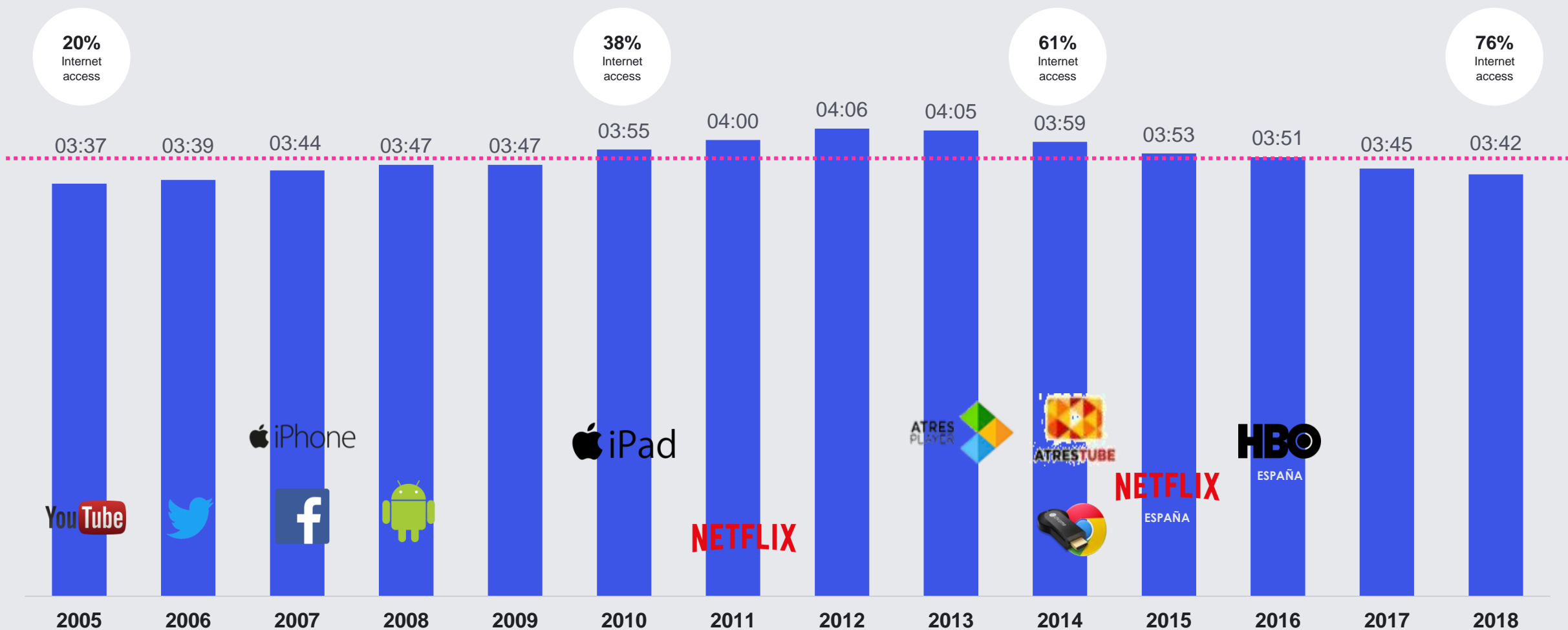


The pink line represents the average time spent (03:49)

TV's resilience: Hours of Linear TV viewed on a TV set per day

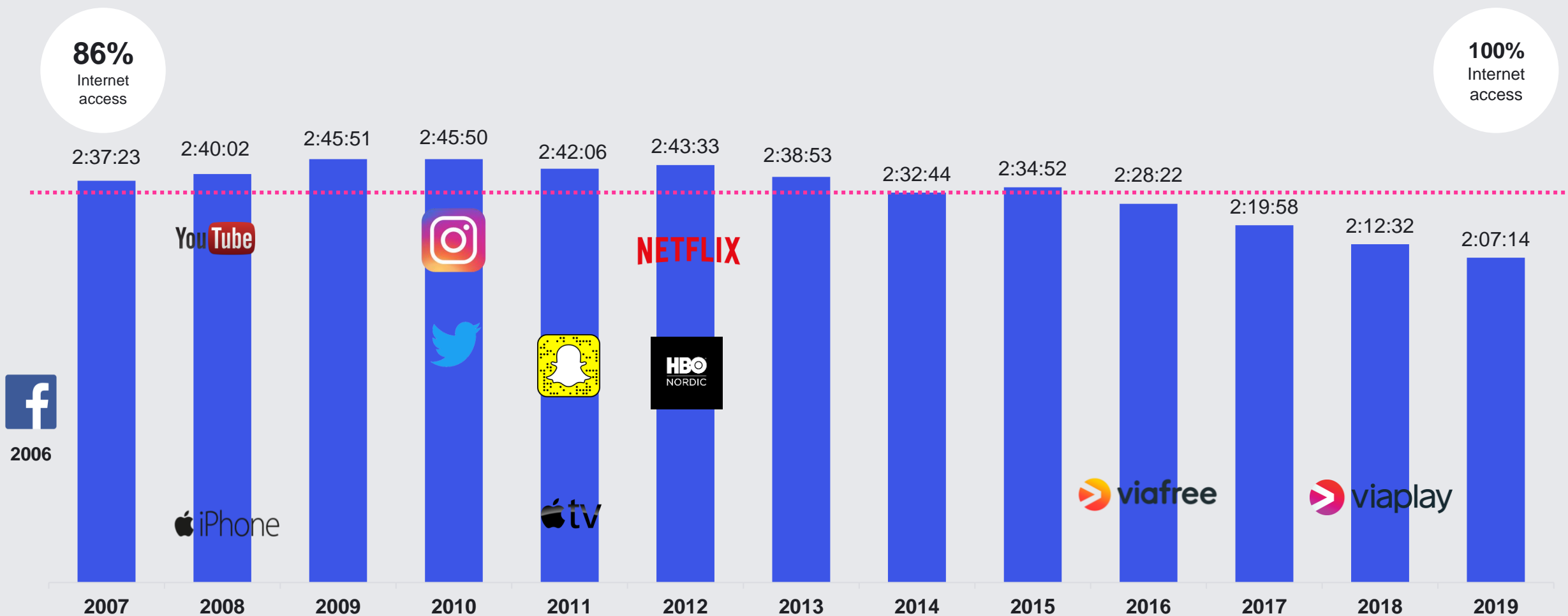


TV's resilience: Hours of Linear TV viewed on a TV set per day



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

TV's resilience: Hours of Linear TV viewed on a TV set per day*



86%
Internet
access

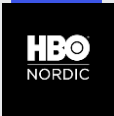
100%
Internet
access

f
2006

You Tube



NETFLIX



iPhone

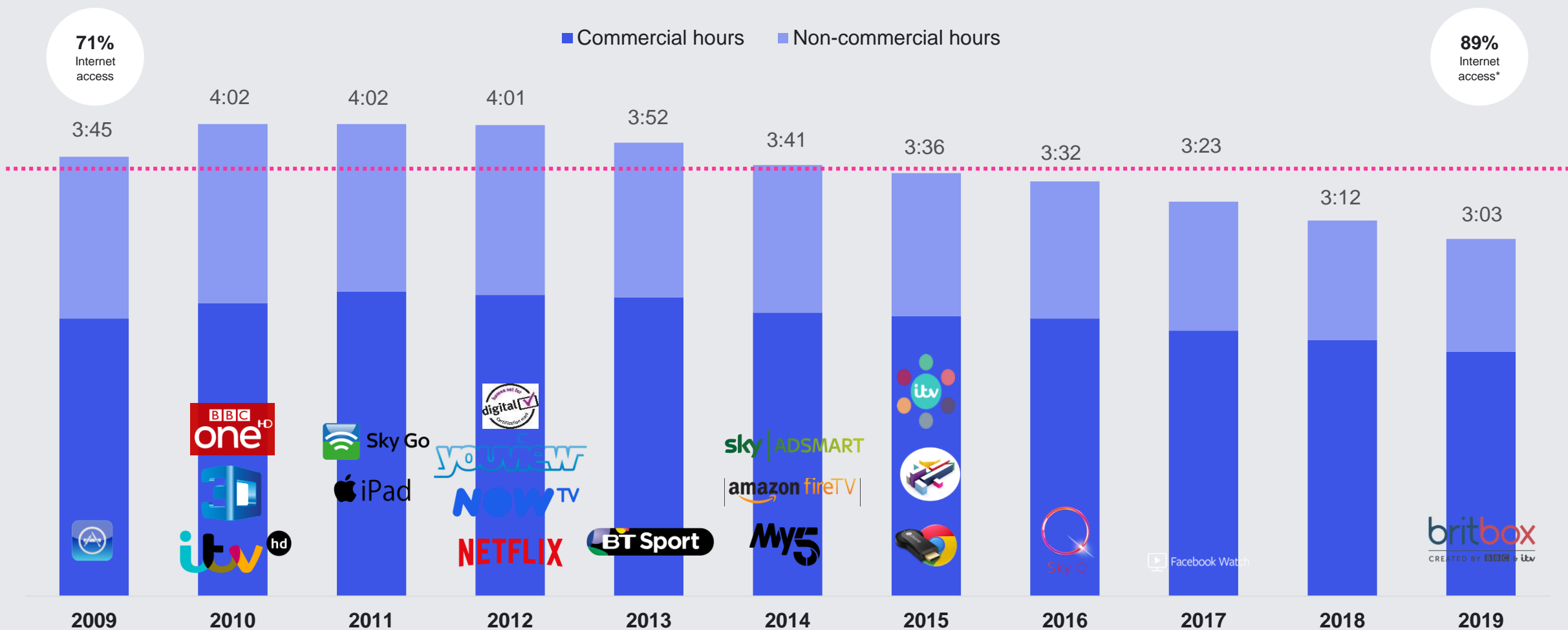
Apple tv

viafree

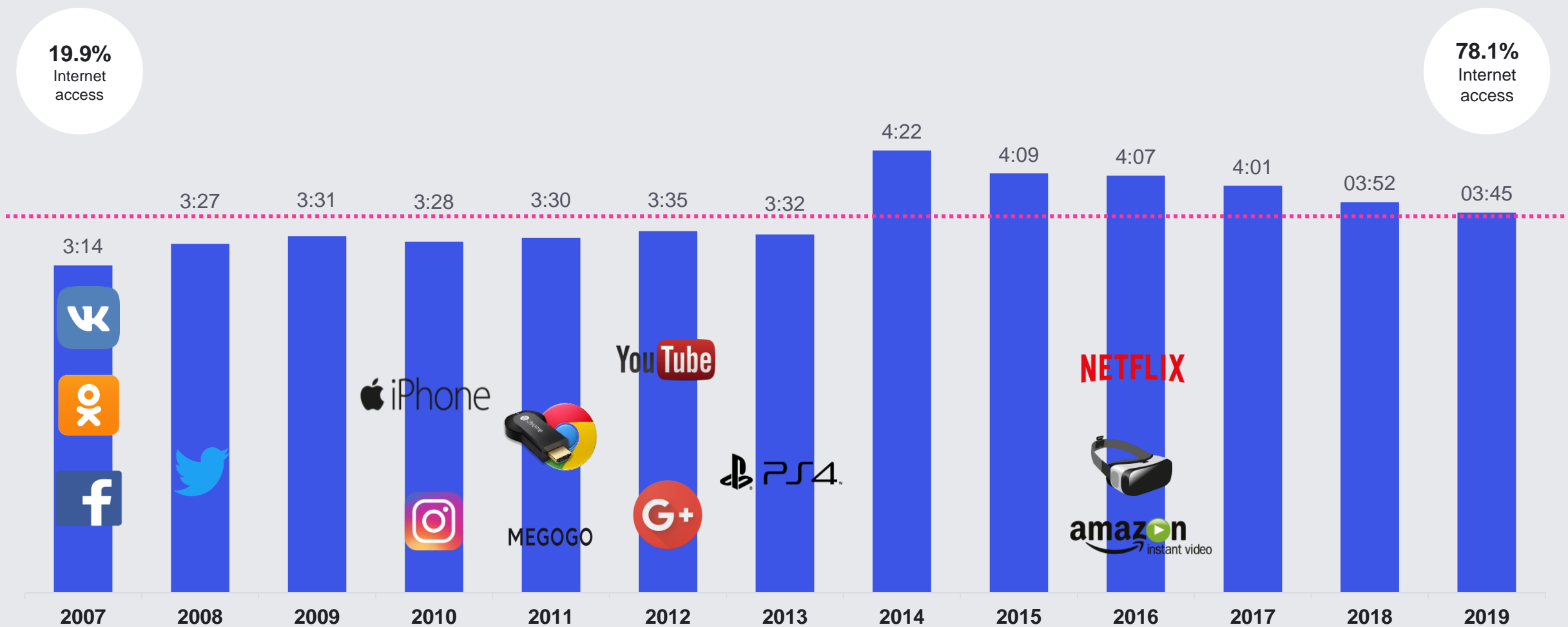
viaplay

The pink line represents the average time spent (02:33)

TV's resilience: Hours of Linear TV viewed on a TV set per day



TV's resilience: Hours of Linear TV viewed on a TV set per day

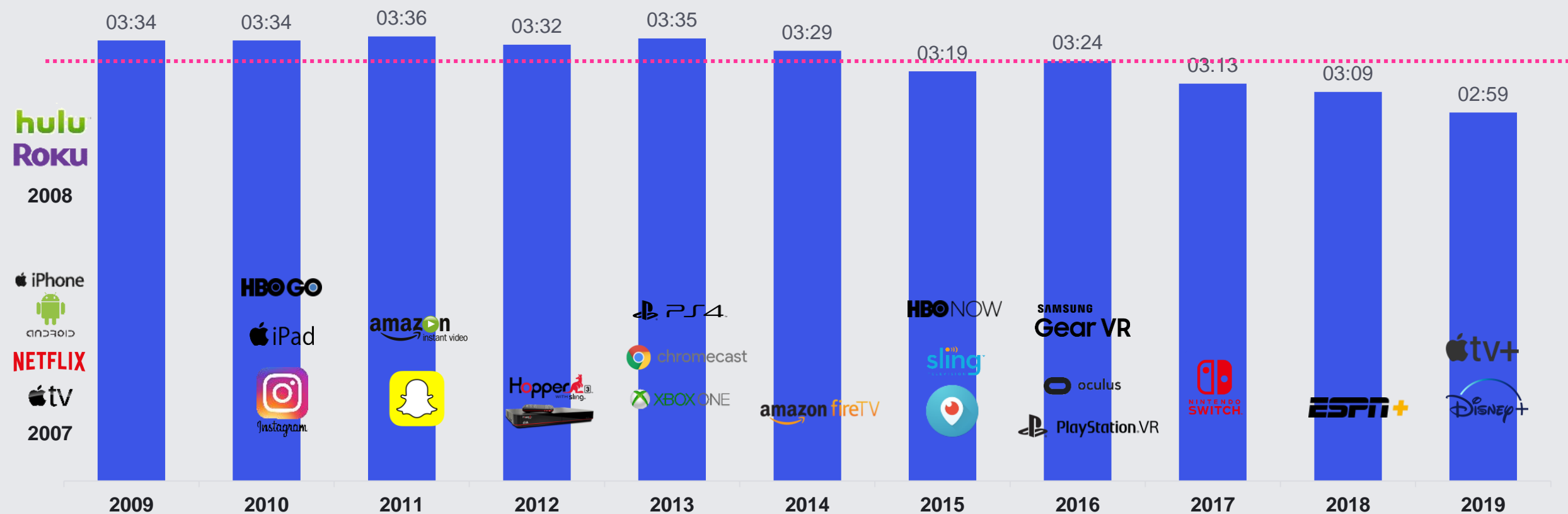


19.9%
Internet
access

78.1%
Internet
access

The pink line represents the average time spent (03:44)

TV's resilience: Hours of Linear TV viewed on a TV set per day



The pink line represents the average time spent (3:24)

Popularity

TV has by far the biggest share of attention

“What better way to **get into the hearts and minds** of Britain’s families than to team up with the biggest family show on TV. This partnership brought us into the homes of over eight million viewers each week, telling more families than ever about our great value, great quality food.”

Sharry Cramond Marketing Director, M&S Food

January 2020

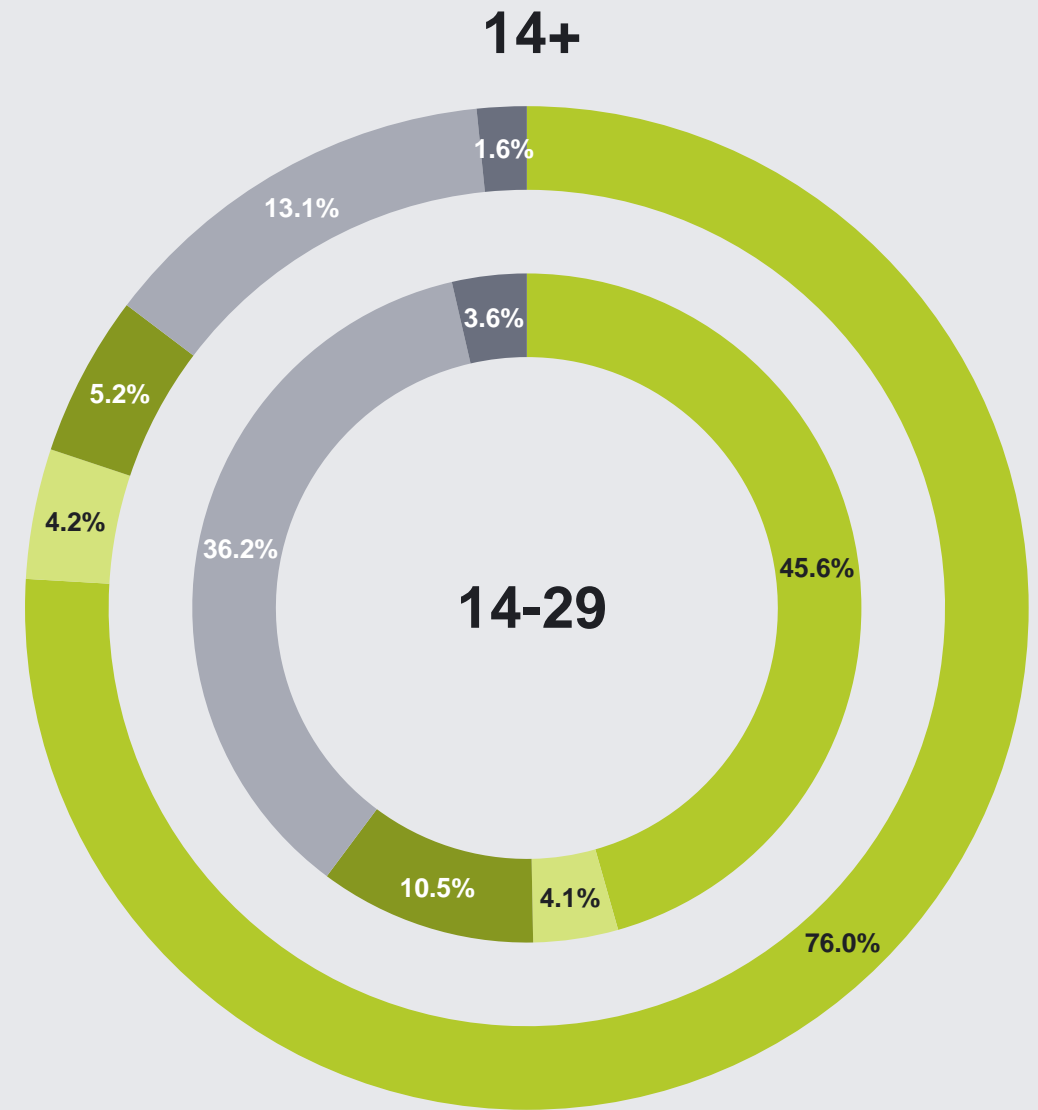
TV is 85% of video time in Austria

Average video time per day

Adults 14+: 219 minutes

14-29: 197 minutes

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



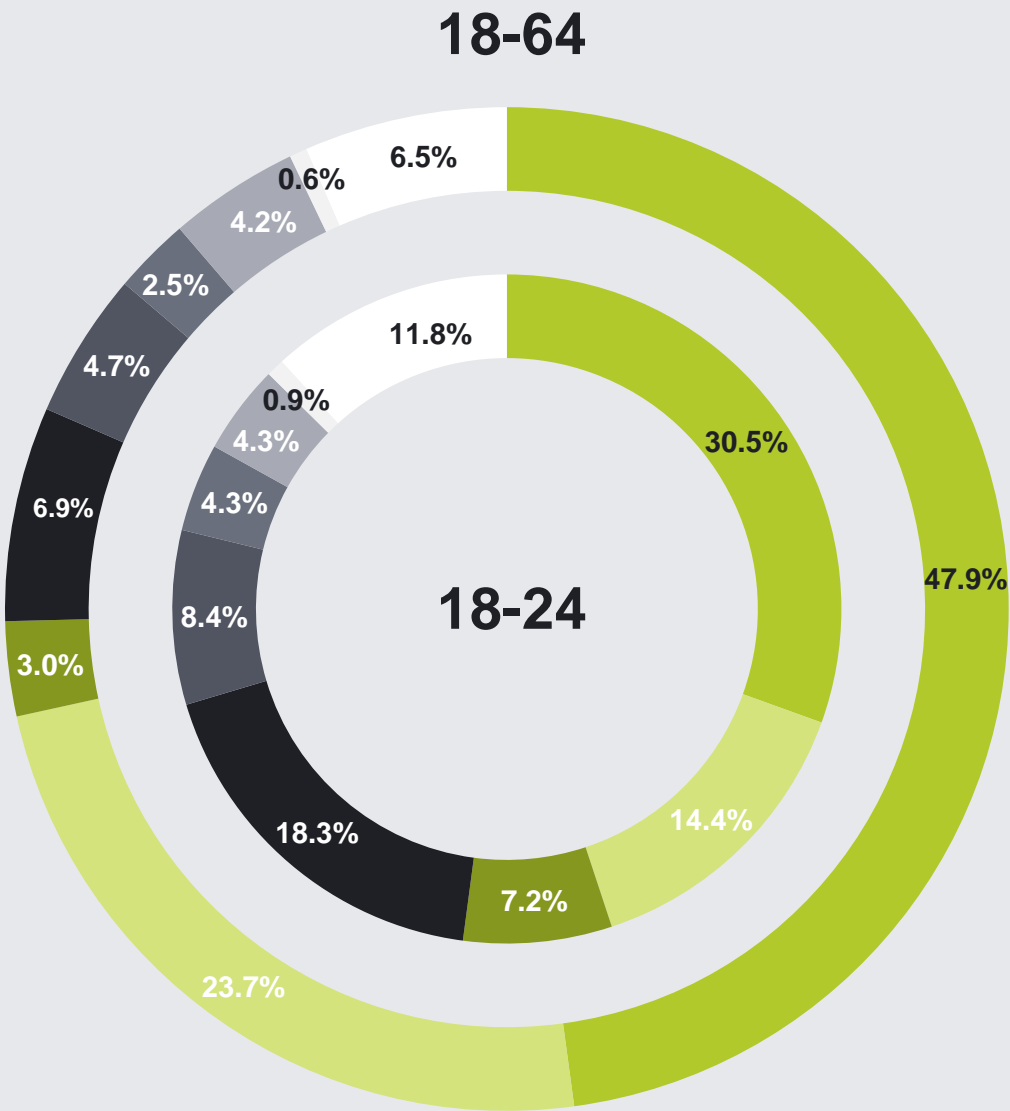
TV is 75% of video time in Belgium North

Average video time per day

Adults 18-64: 268 minutes

18-24: 268 minutes

- Live TV
- Playback/catch-up TV
- Broadcaster VOD
- Videos on youtube, etc.
- Videos on Facebook, etc.
- DVD, etc.
- Download, legal or not
- Cinema
- Subscription VOD



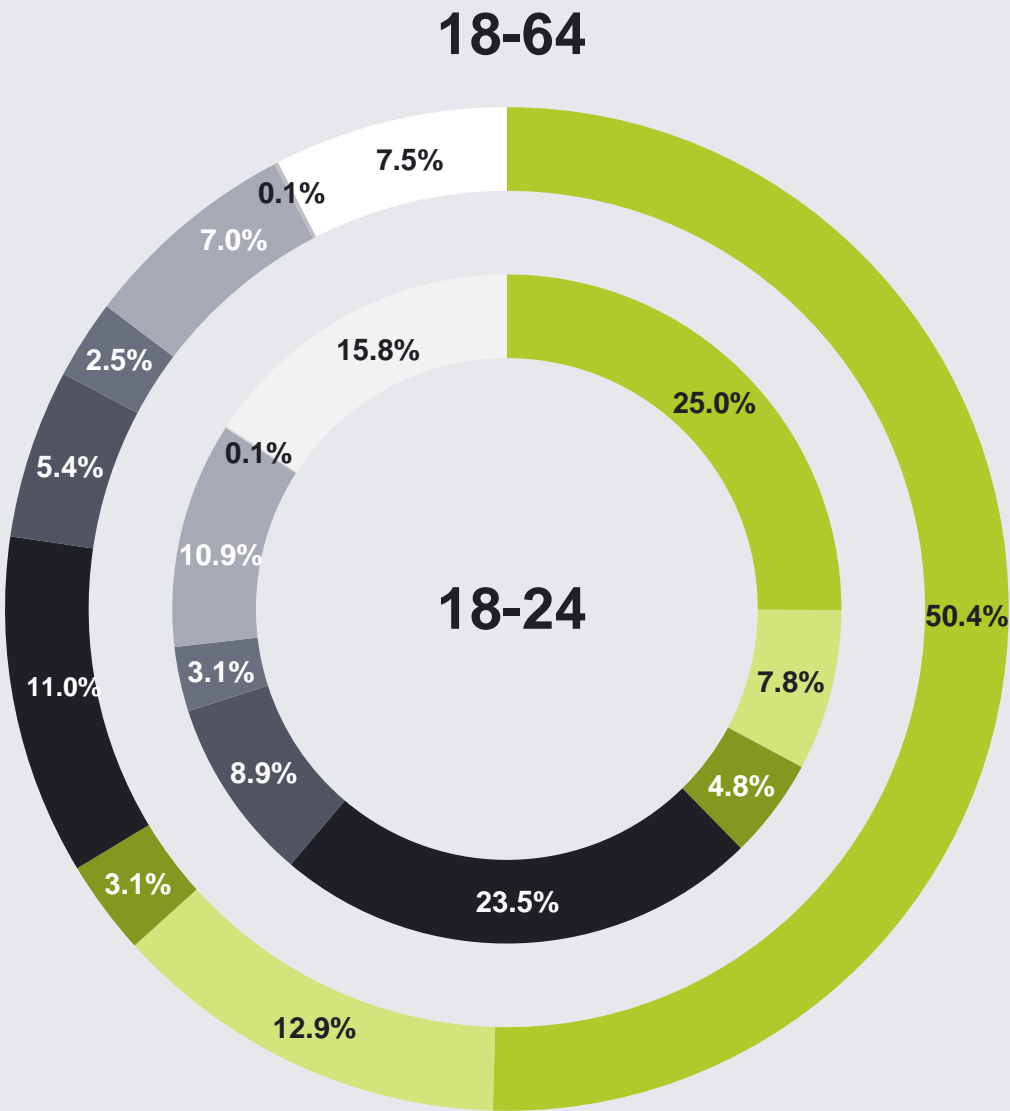
TV is 66% of video time in Belgium South

Average video time per day

Adults 18-64: 307 minutes

18-24: 315 minutes

- Live TV
- Playback/catch-up TV
- Broadcaster VOD
- Videos on youtube, etc.
- Videos on Facebook, etc.
- DVD, etc.
- Download, legal or not
- Cinema
- Subscription VOD



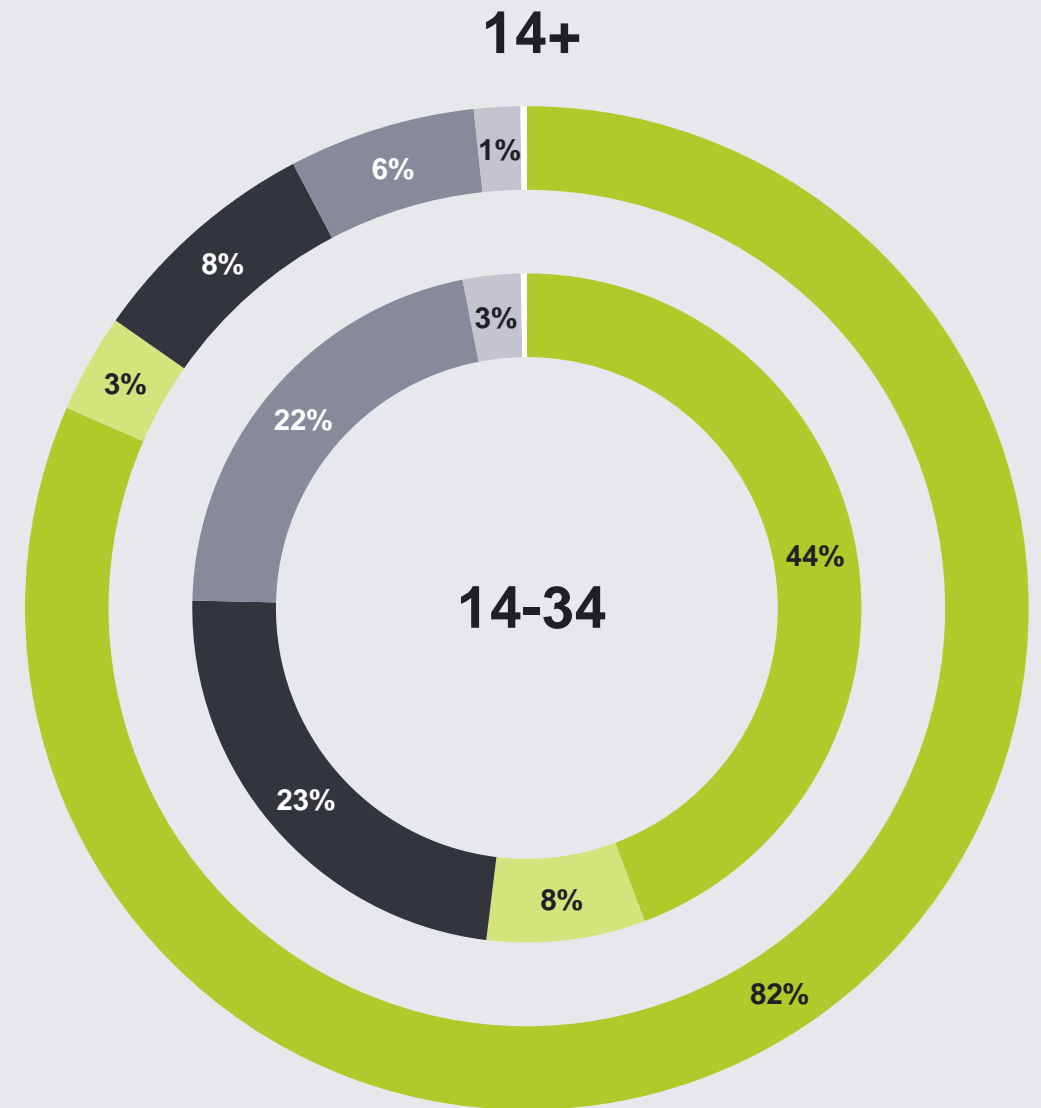
TV is 85% of video time in Germany

Average video time per day

Adults 14+: 279 minutes

14-34: 216 minutes

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



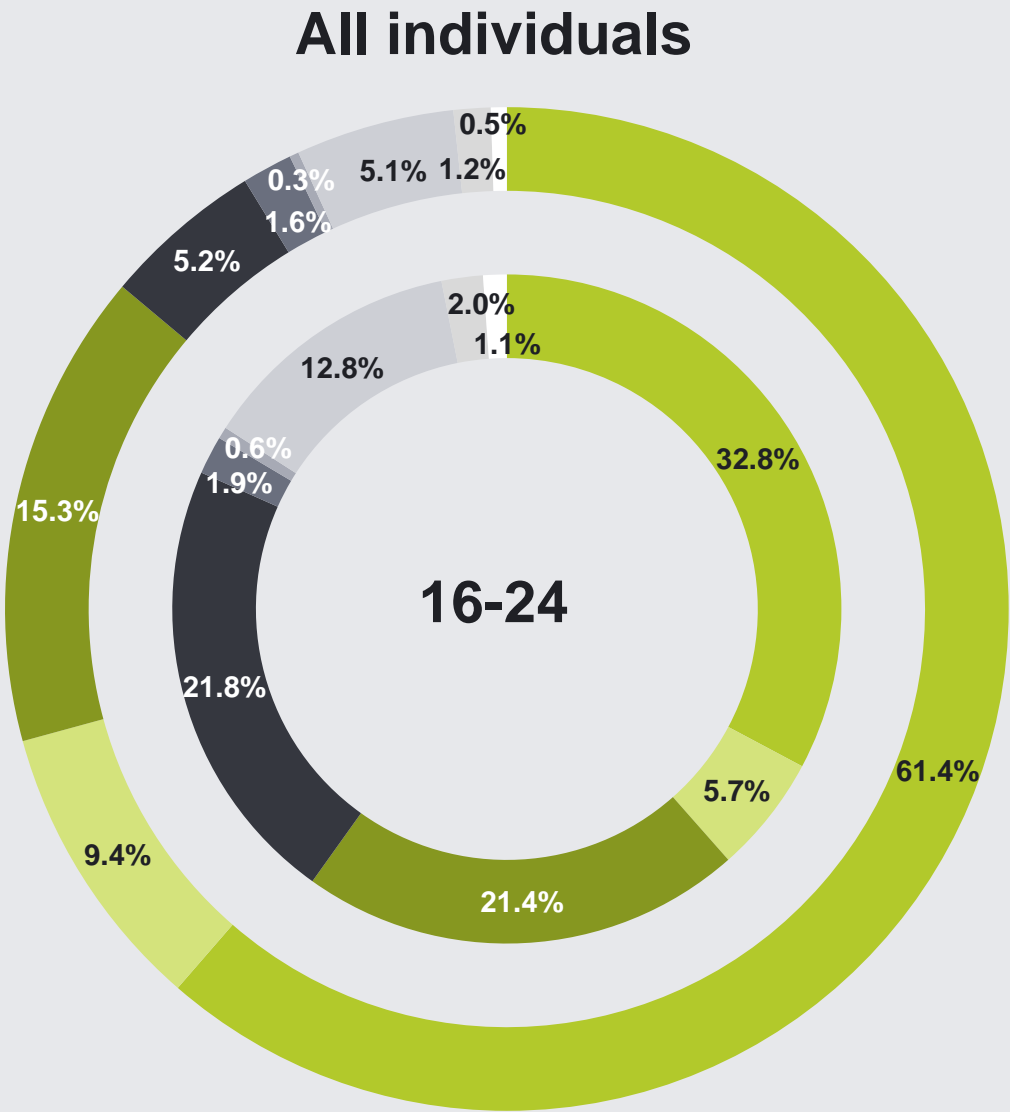
TV is 86% of video time in the Netherlands

Average video time per day

All individuals 13+: 234 minutes

16-24: 140 minutes

- Live TV
- Playback TV
- Other content via TV-screen
- YouTube
- Facebook
- Other online video
- Subscription VOD
- VOD broadcasters
- Cinema

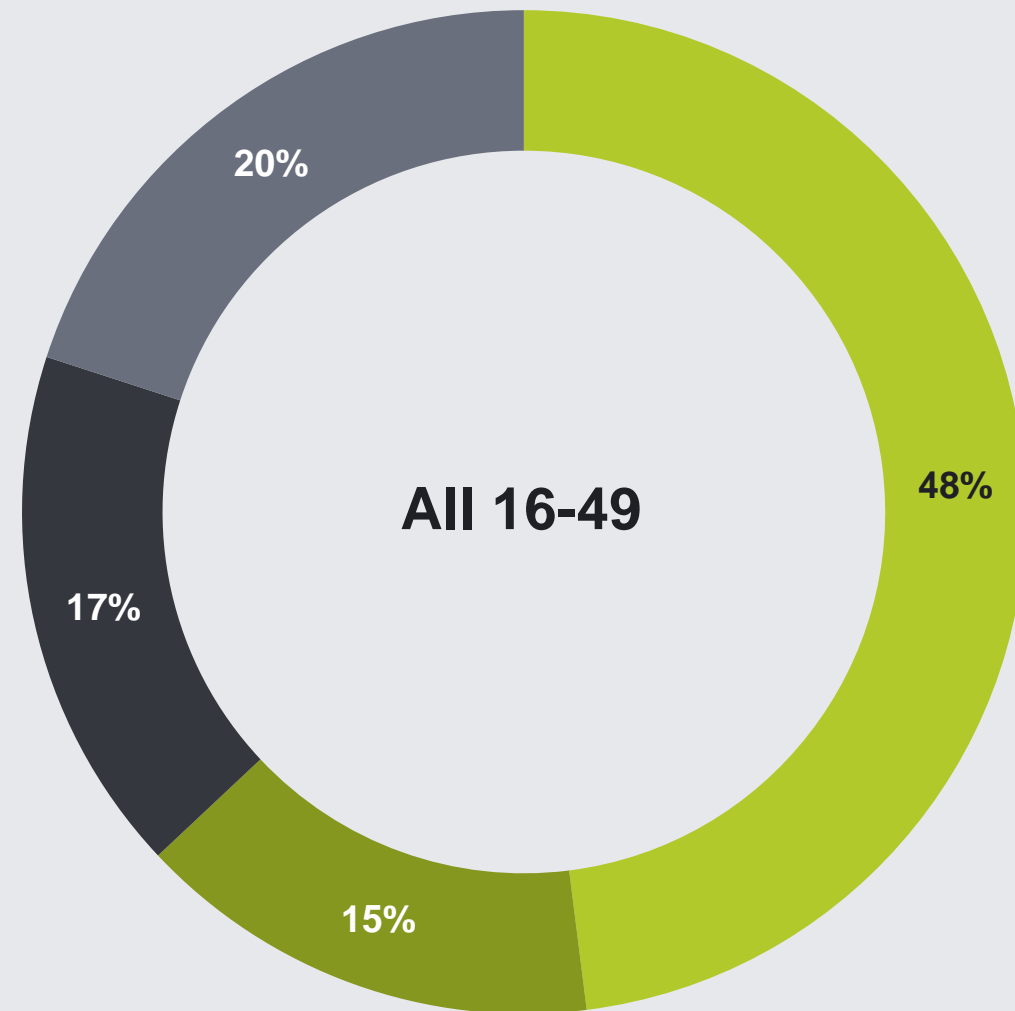


TV is 63% of video time in Poland

Average video time per day

All 16-49 = 277 min

- Live TV
- TSV+BVOD
- SVOD
- YouTube



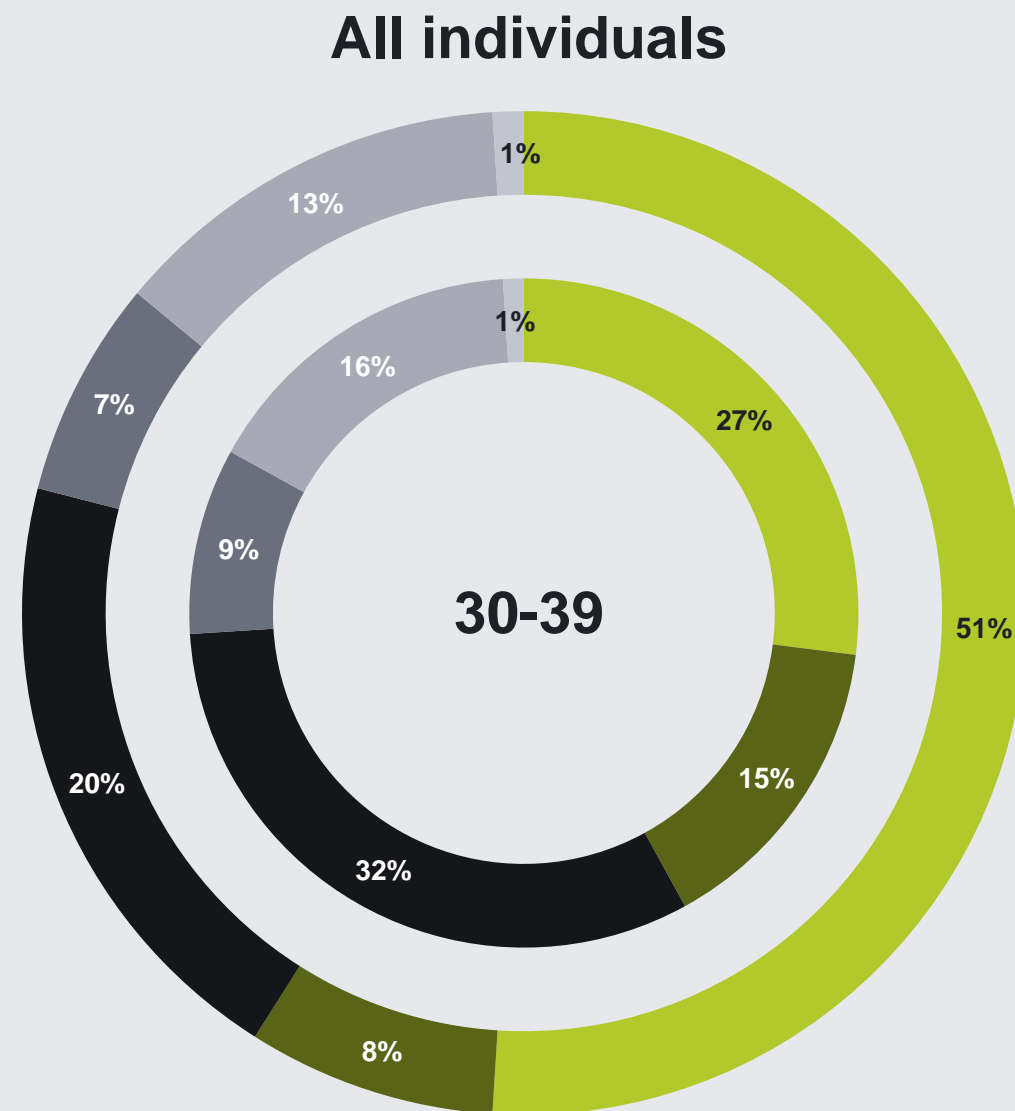
TV is 51% of video time in Sweden

Average video time per day

All individuals: 253 minutes

30-39yrs: 192 minutes

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



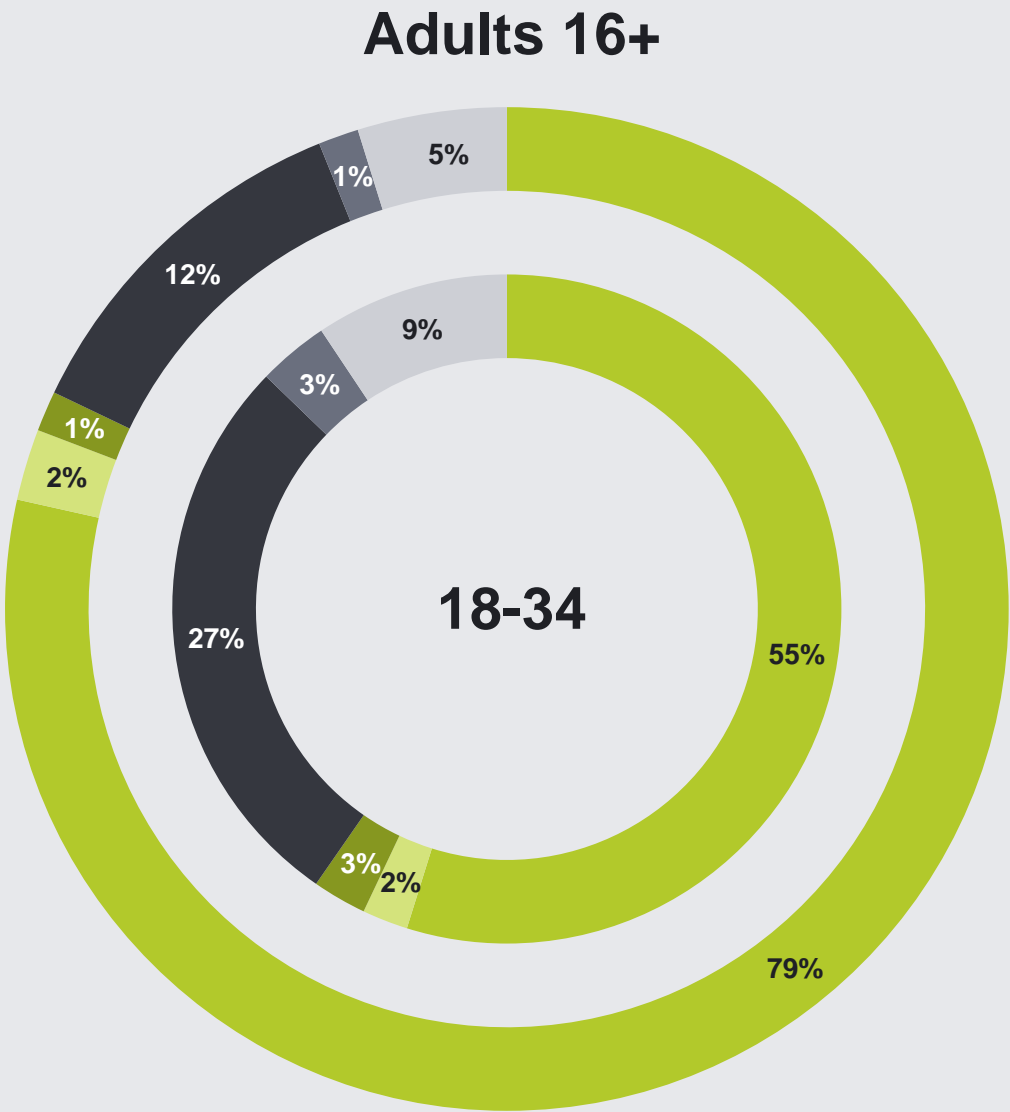
TV is 79% of video time in Spain

Average video time per day

Adults 16+: 305 minutes

18-34 yrs: 226 minutes

- Live TV
- Time Shift 7 days
- Broadcaster VOD
- YouTube
- Subscription VOD
- Other Online Video



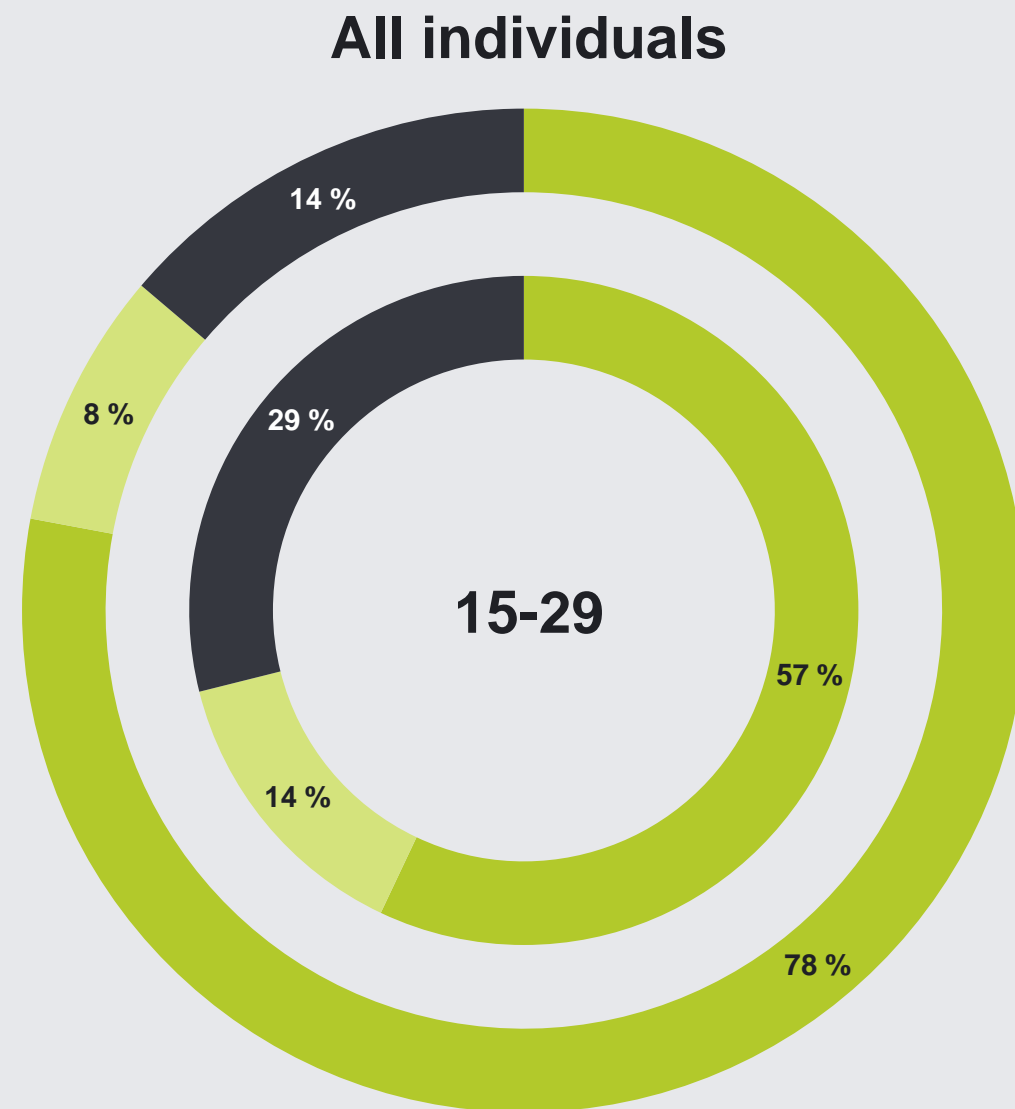
TV is 86% of video time in Switzerland

Average video time per day

All individuals: 145 minutes

15-29: 128 minutes

- Live TV
- Playback TV
- Other online video



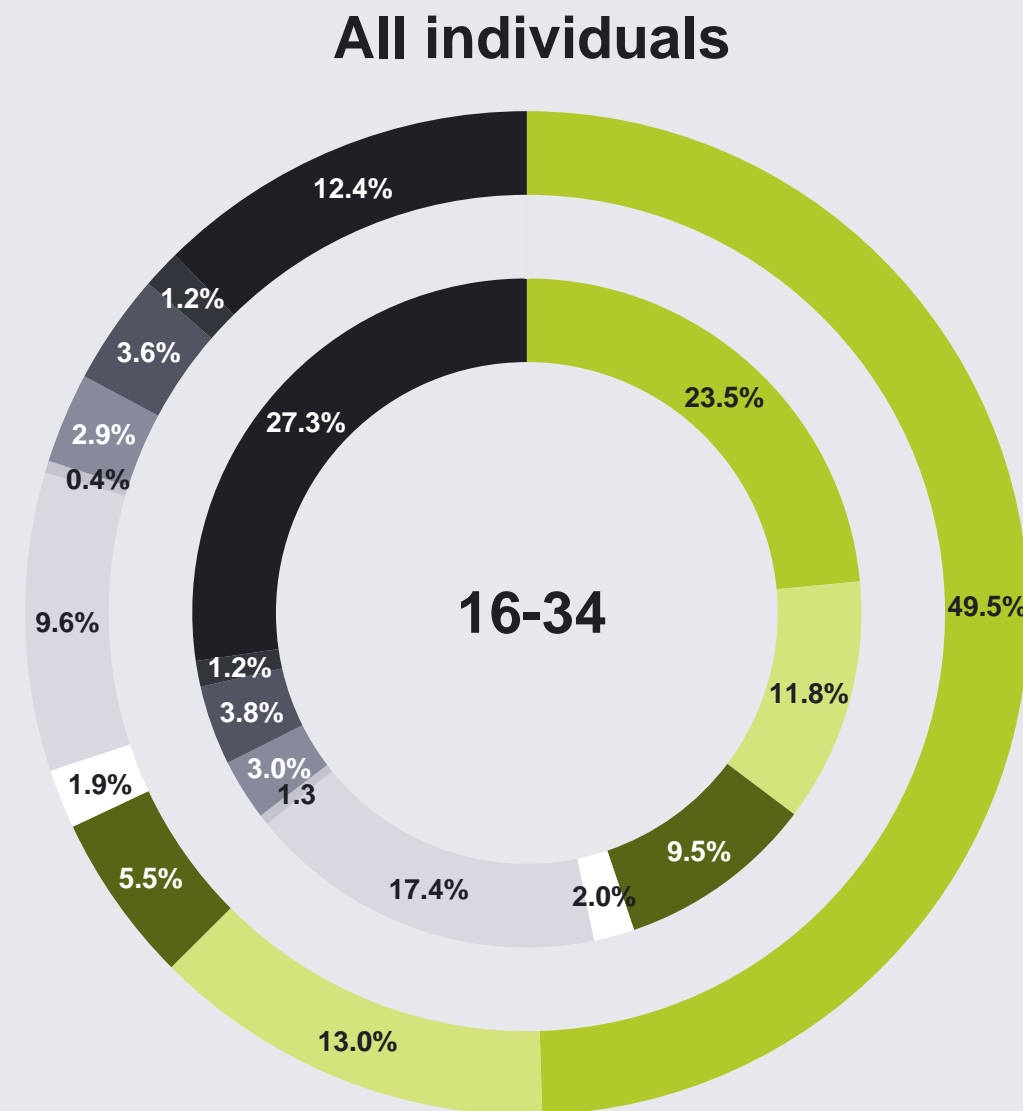
TV is 68% of video time in the UK

Average video time per day

All individuals: 282 minutes

16-34s: 253 minutes

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



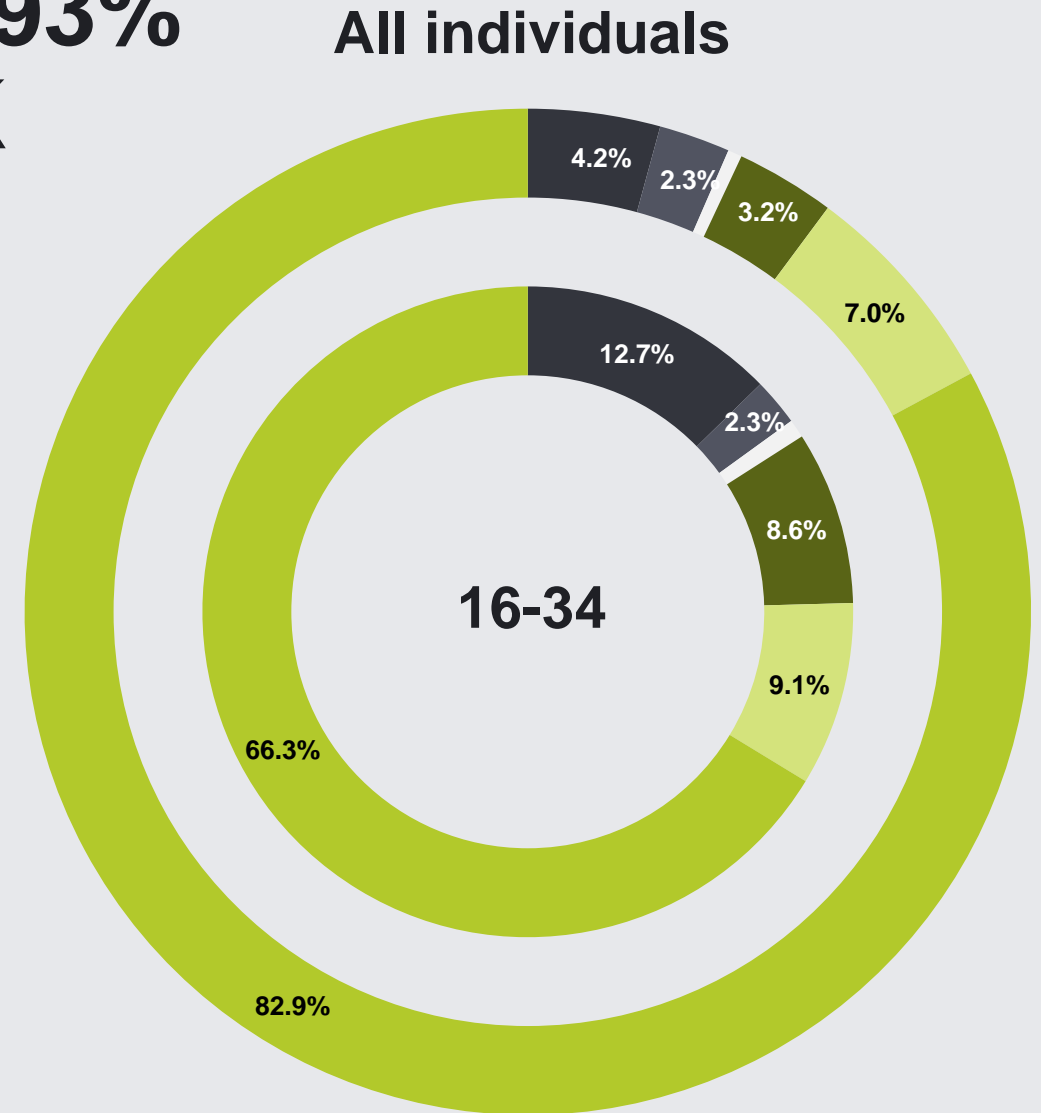
Broadcaster TV accounts for 93% of video advertising in the UK

Average video advertising time per day

All Individuals: 18 mins

16-34s: 12 mins

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



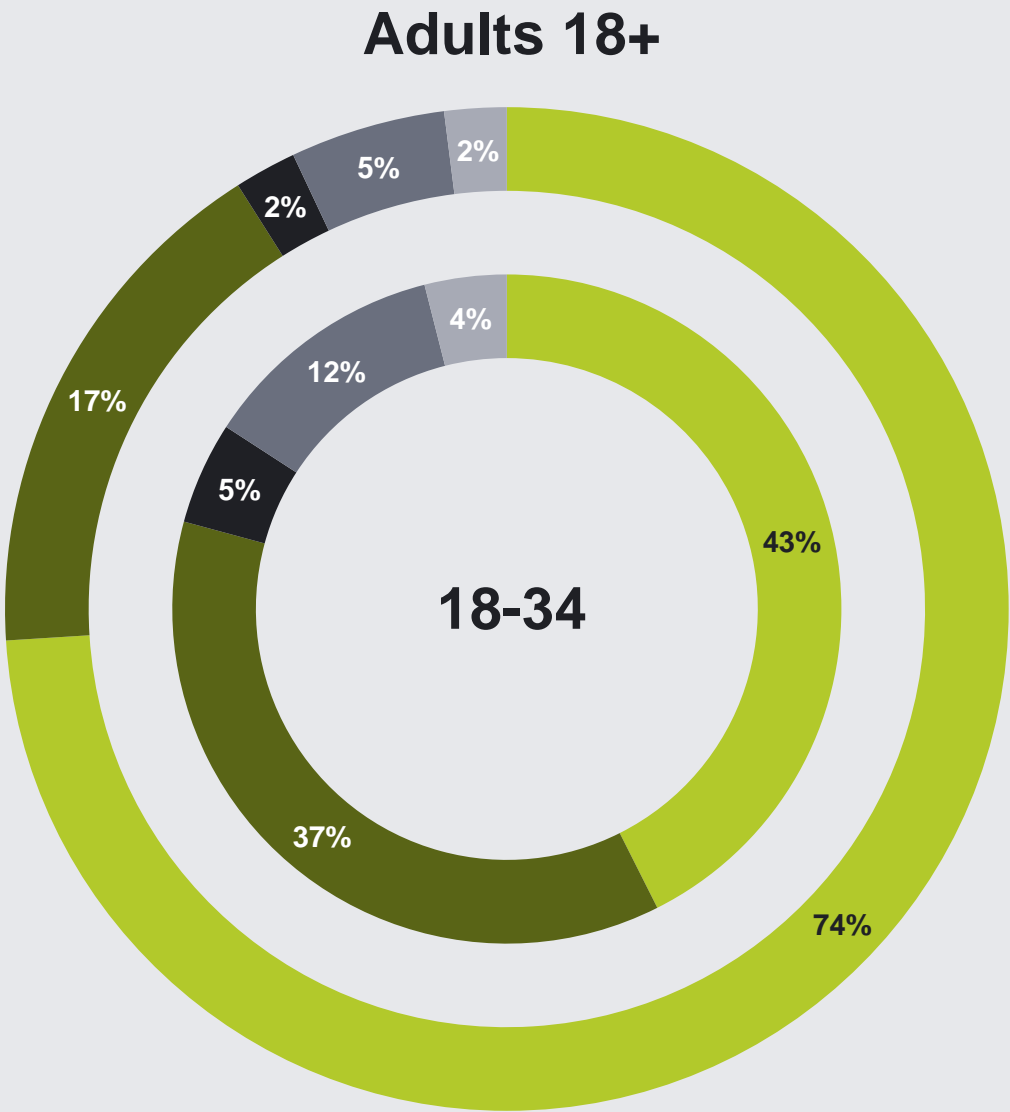
TV is 74% of video time in the U.S.

Average video time per day

Adults 18+: 321 minutes

18-34: 219 minutes

- Live + Time-Shifted TV
- TV-Connected Devices
- Video on a Computer
- Video Focused App/Web on a Smartphone
- Video Focused App/Web on a Tablet



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



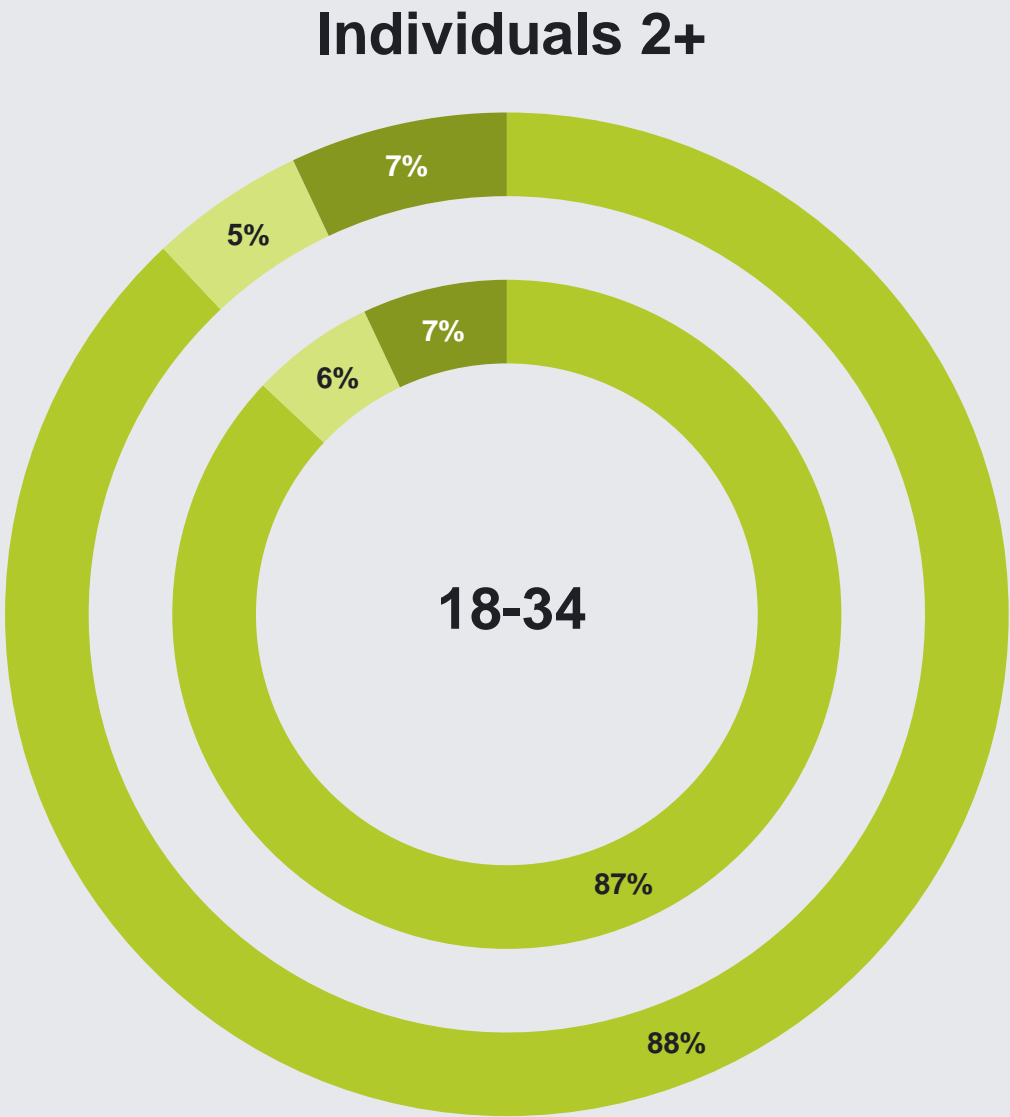
In Canada, 88% of TV is watched live

Average TV time per day

Adults 2+: 187.7 minutes

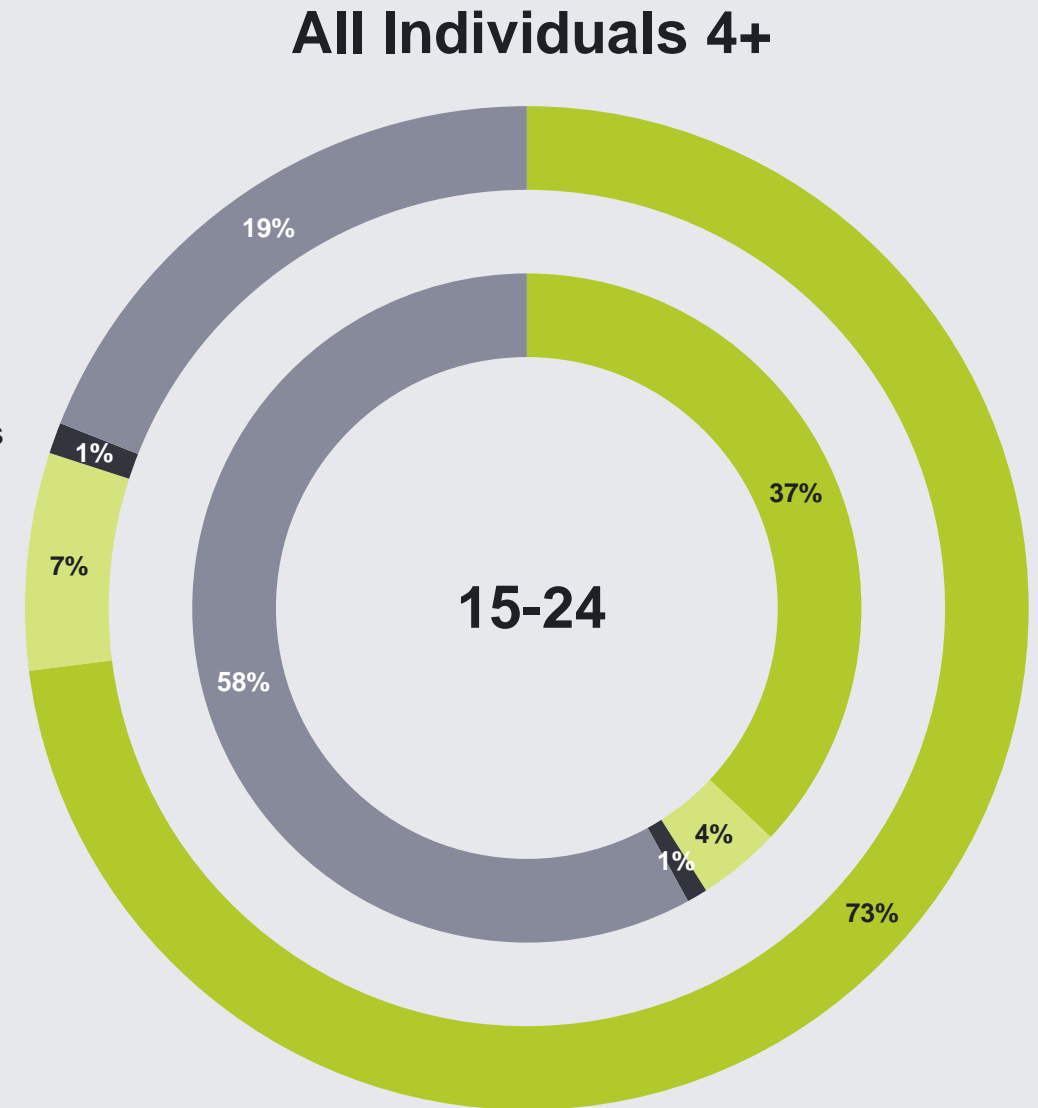
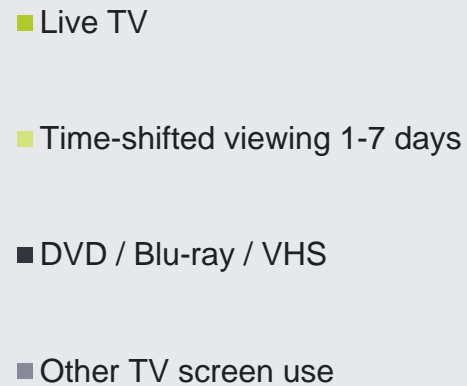
18-34: 108 minutes

- Live
- Same day play back
- Playback 1-7 days



In Finland, 73% of TV is watched live

- Average TV time per day
- All individuals: 202 minutes
- 15-24: 88 minutes

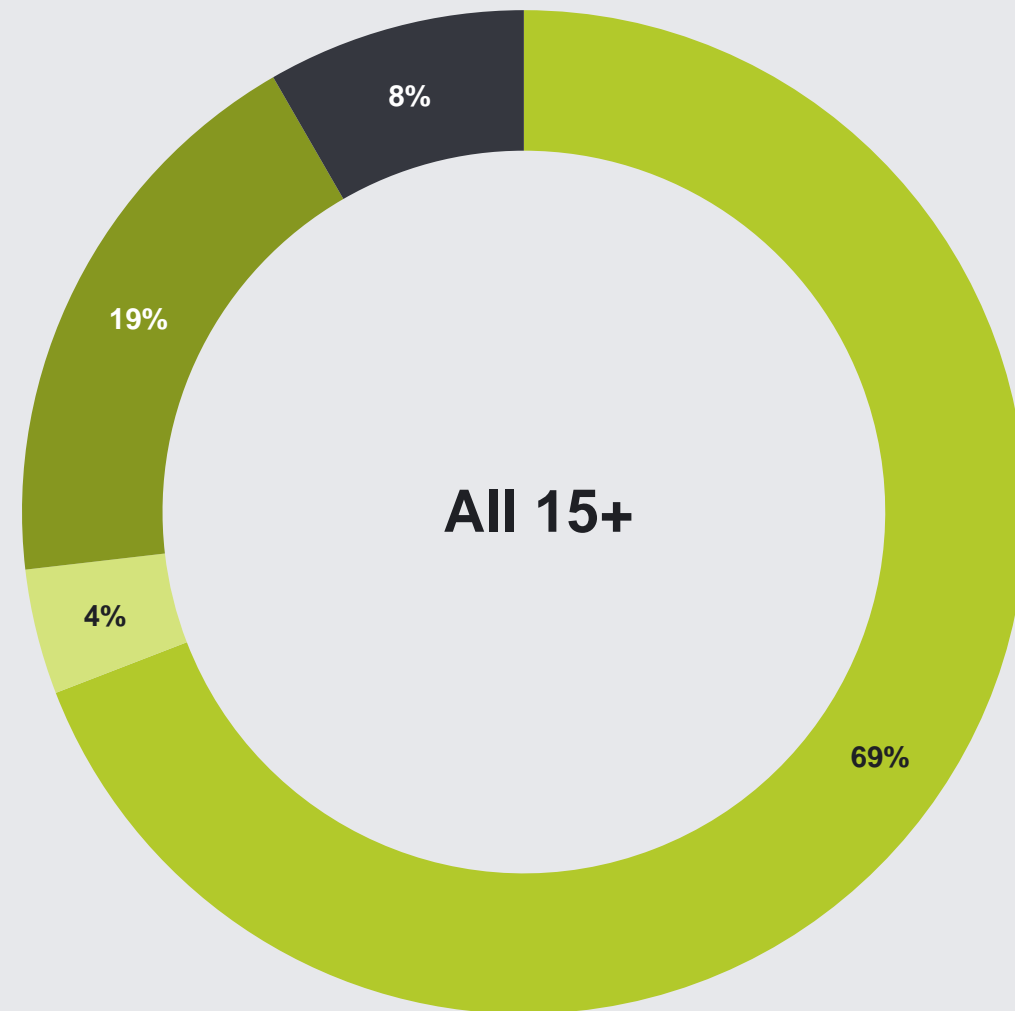


Live TV is 73% of video time in Russia

Average video time per day

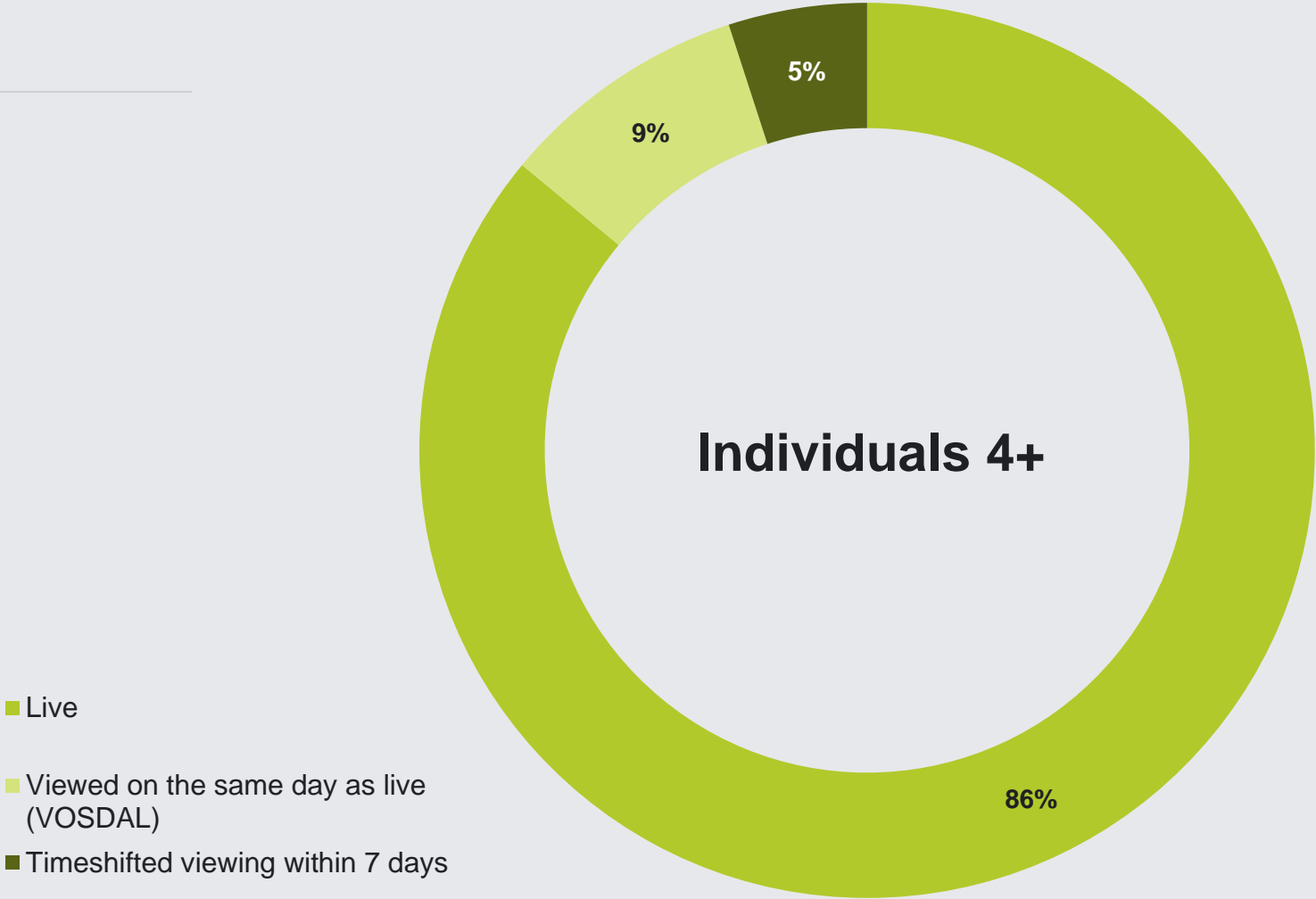
Adults 15+: 230 minutes

- Live TV (on TV set)
- Live TV via OTT
- VOD
- online-video



In Slovenia, 86% of TV is watched live

Average TV time per day
Adults 4+: 227 minutes



Impact

TV is the most trusted and impactful form of advertising



“Most importantly this was not a one-hit wonder, we have continued to use TV as part of our campaign mix and this uplift in results has continued – we have delivered our 2019/20 objectives after only six months, having spent just 30% of the previous year’s budget. It has helped to embed confidence in the power of TV as a credible channel for MHA across the organisation and that great results are achievable even on a low budget.”

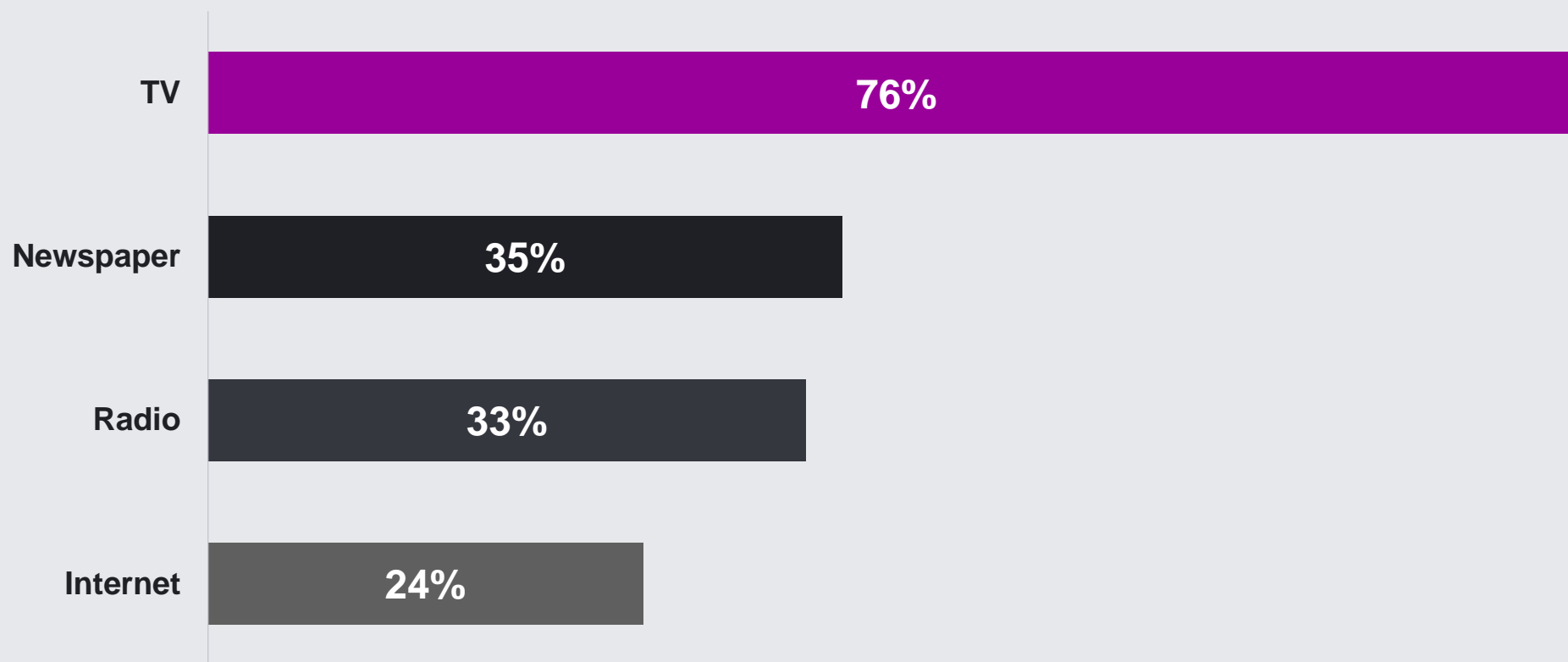
Nick Williams, MHA Head of Marketing

November 2019

TV is the main source of news

TV is our main source for news

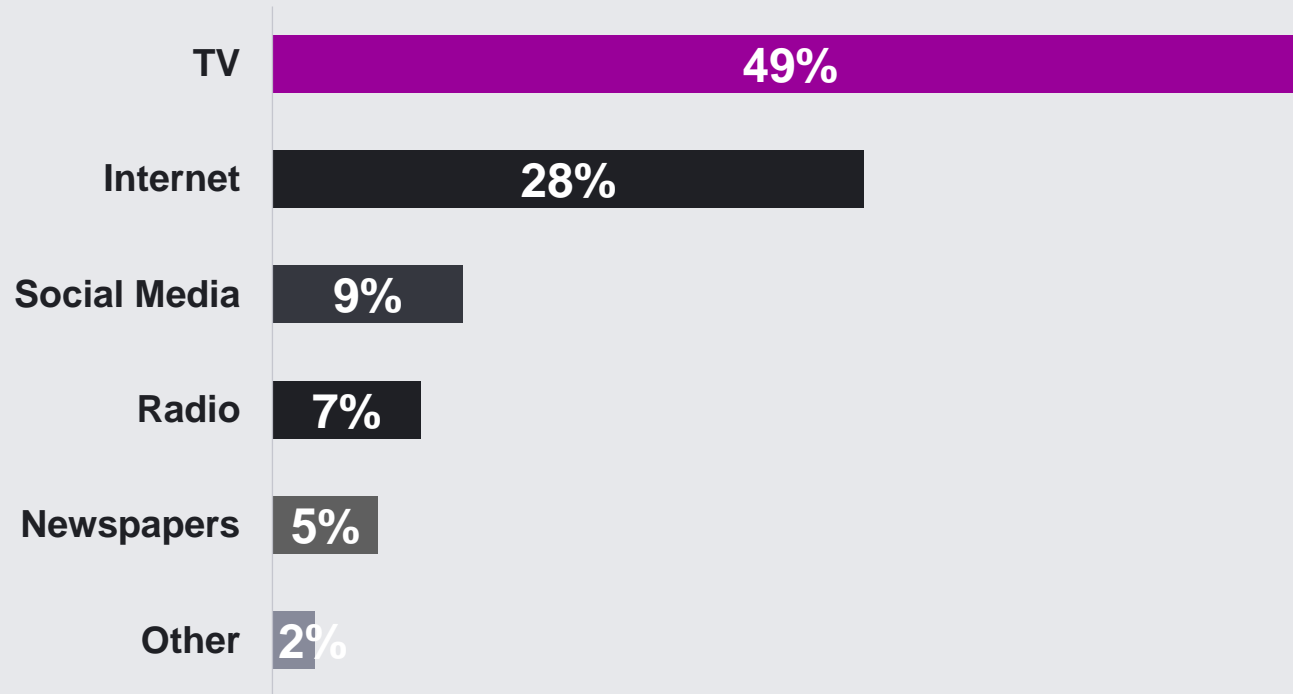
% of adults (+20) who often get news on each platform daily



TV is our main source for news

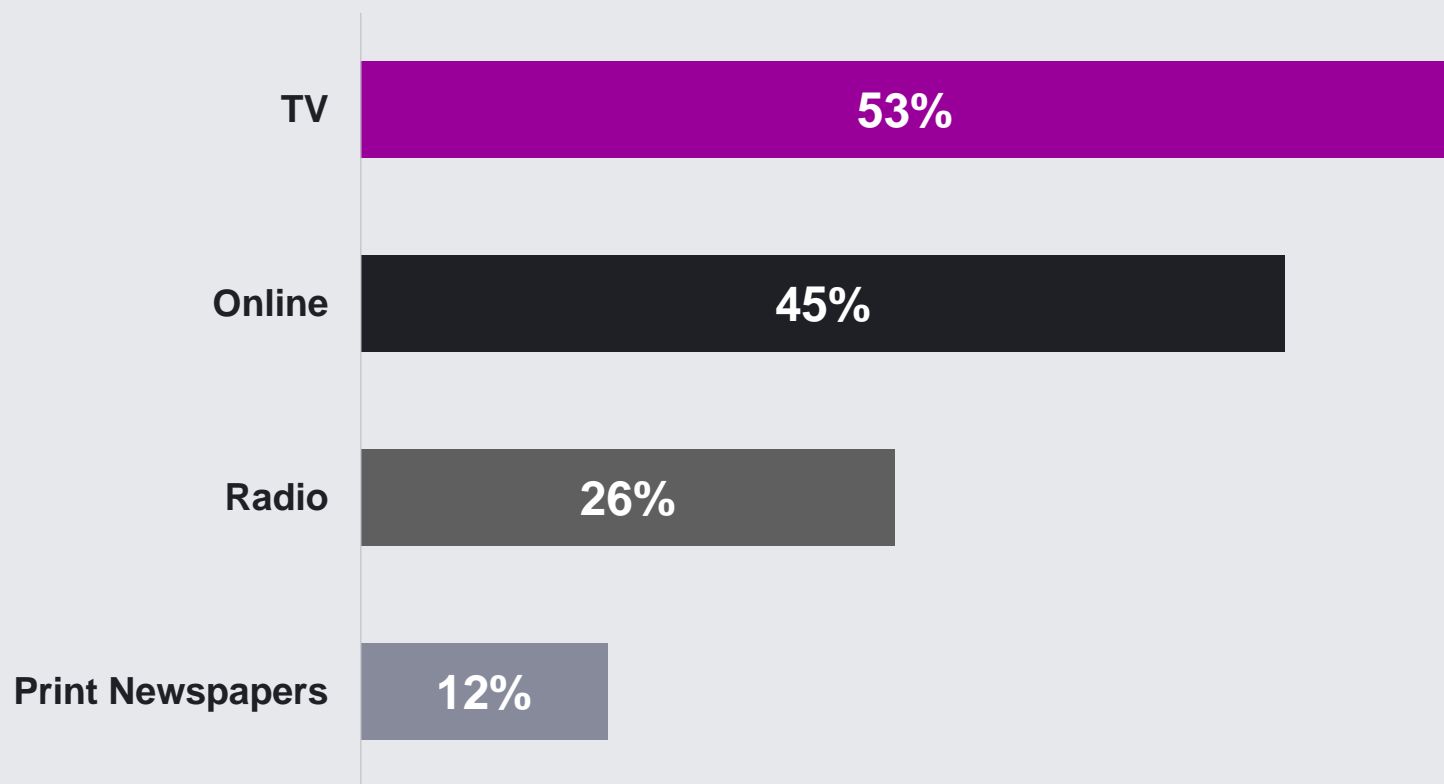
Canadians turn to TV as their primary source for news during the COVID crisis.

Which of the following has been your primary source of news during the COVID crisis?



TV is our main source for news

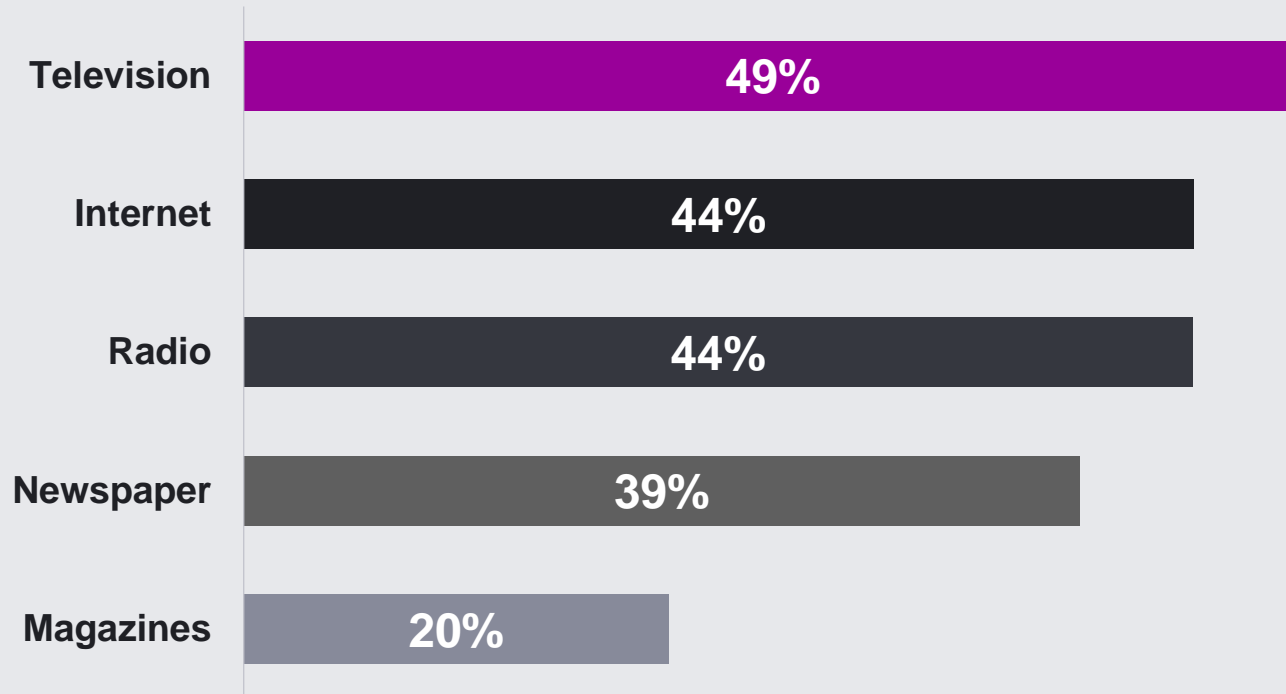
% of adults who search for news on each platform daily or several times a week



TV is our main source for news

% of adults 18+ who often get information on each platform daily

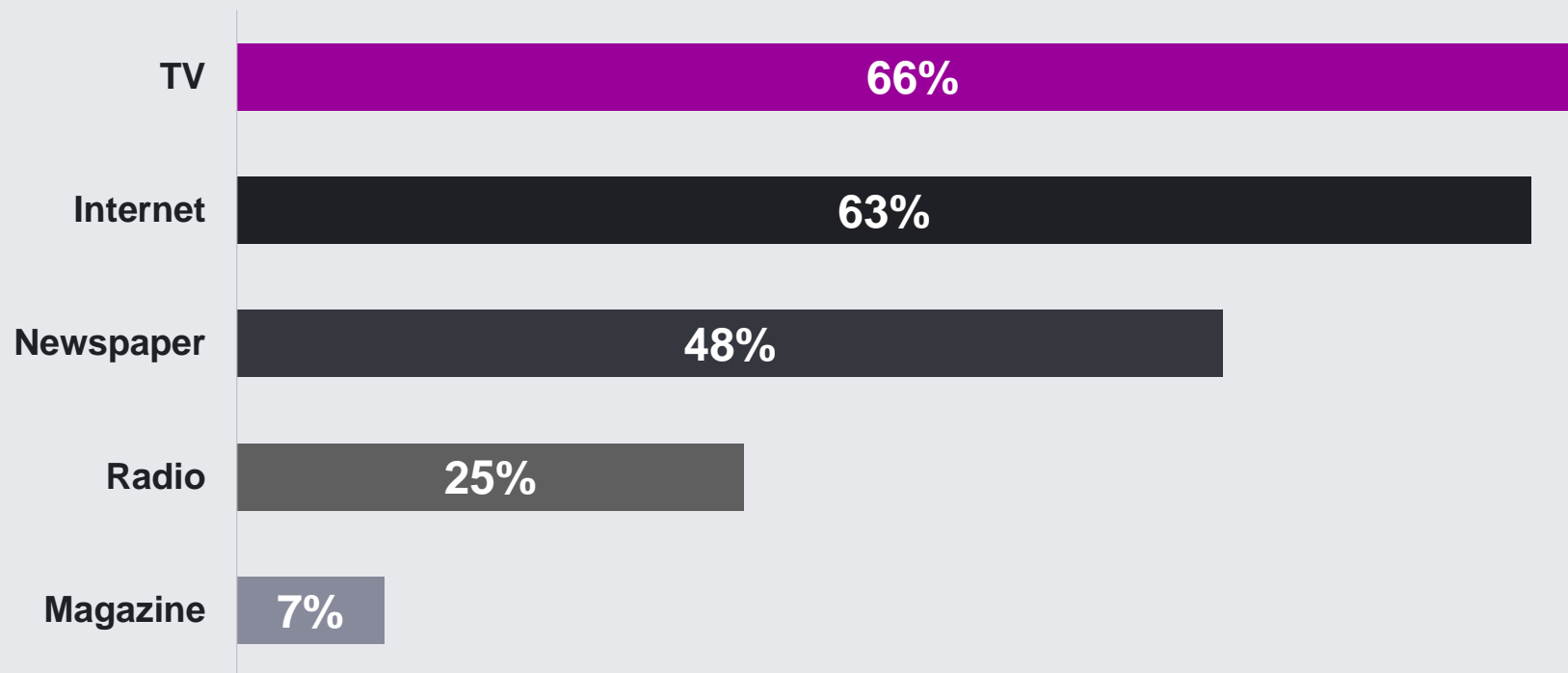
I rely on the following media to keep me informed



TV is our main source for news

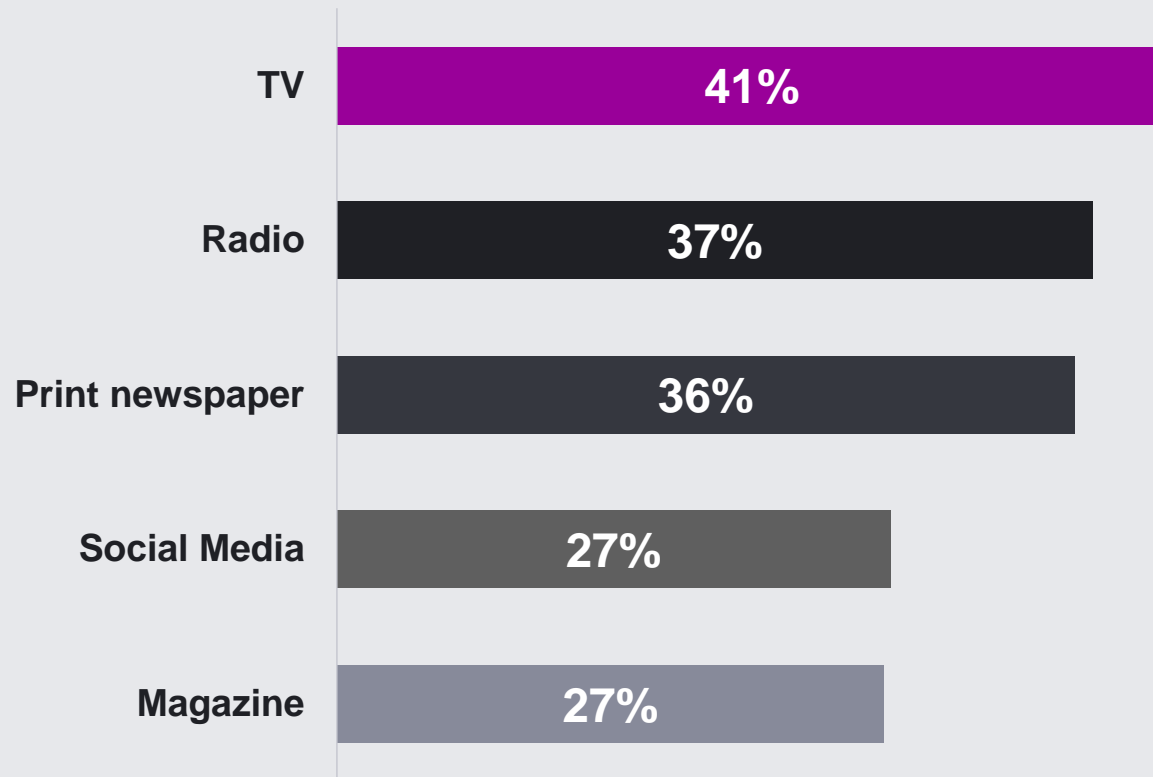
% of adults 18+ who often get information on each platform daily

It serves as a source of information



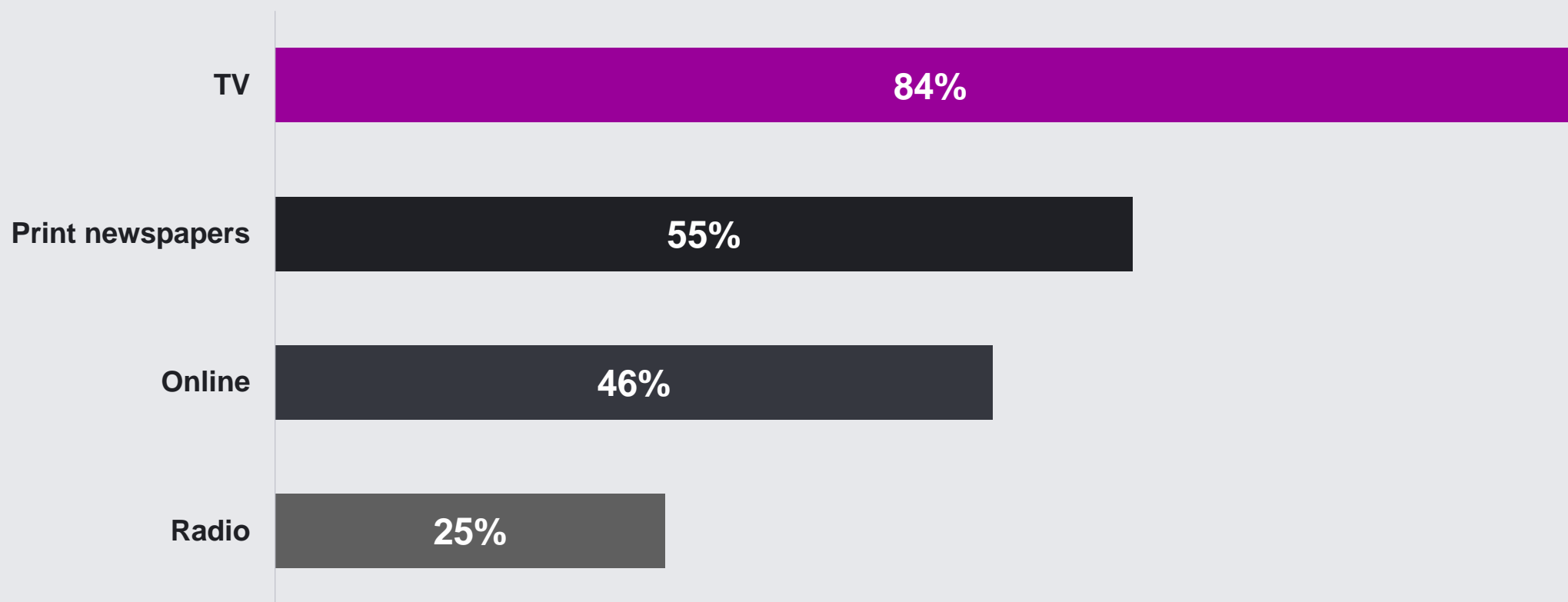
TV is our main source for news

% of adults who often get news on each platform daily

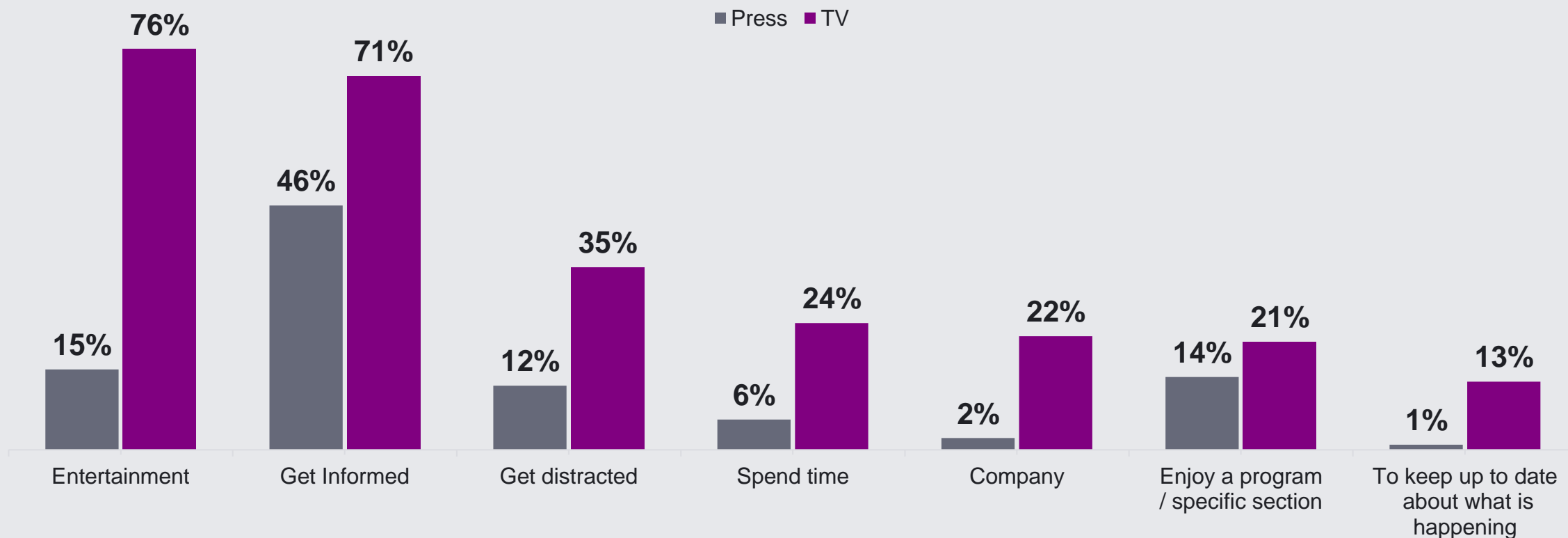


TV is our main source for news

% of adults who often get news on each platform daily

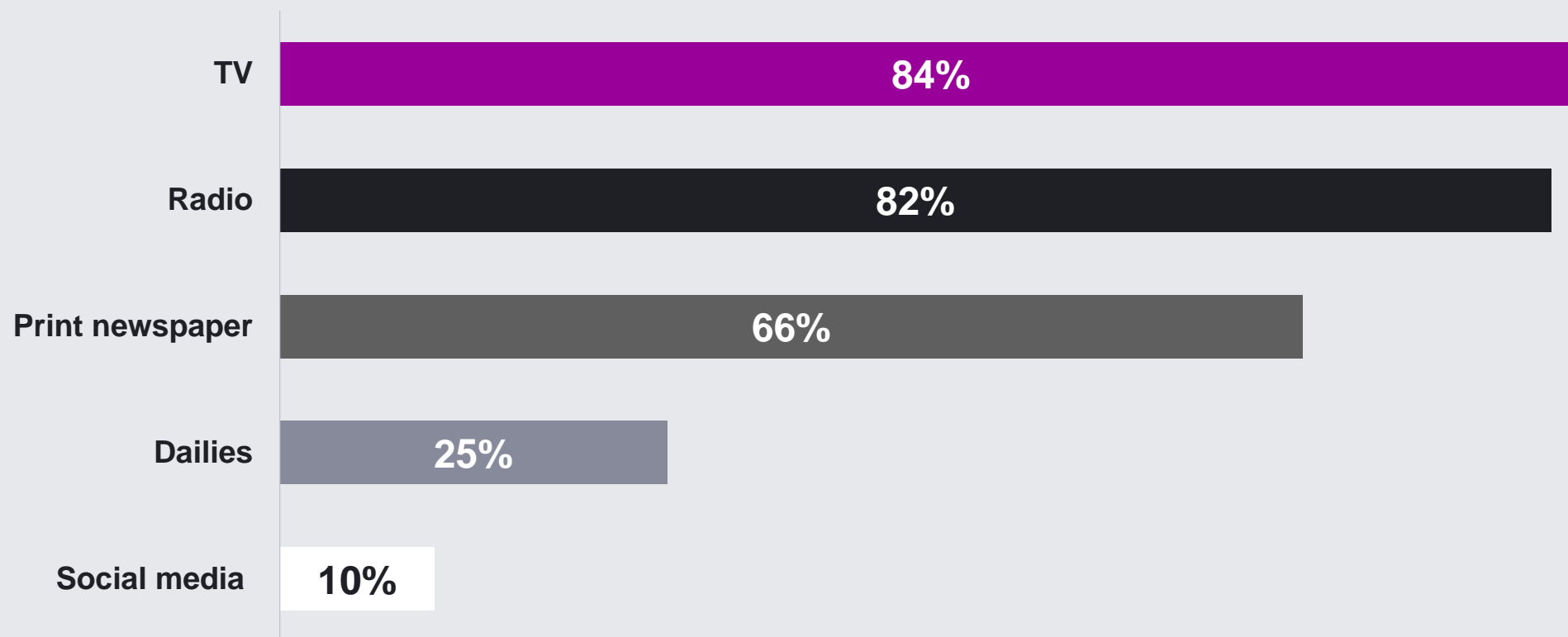


Television is more informative than newspapers



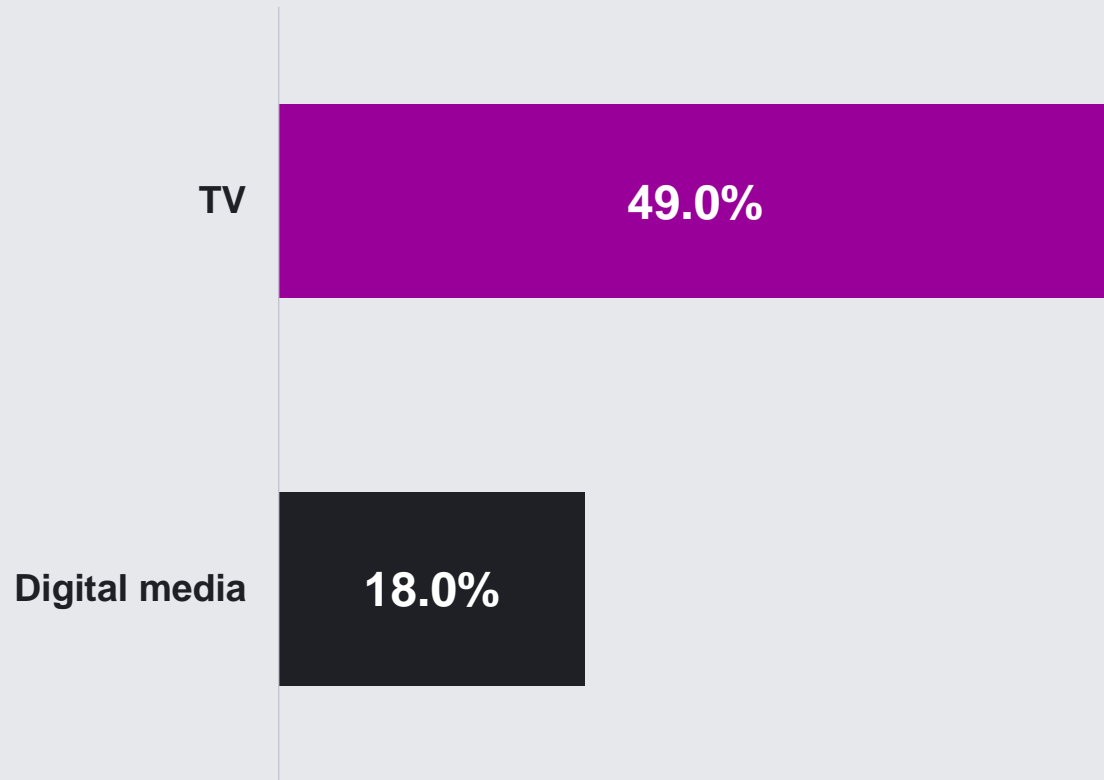
TV is the main source for news

% of adults who often get news on each platform daily



TV is our main source for news

% of adults choosing the media as their main source of information

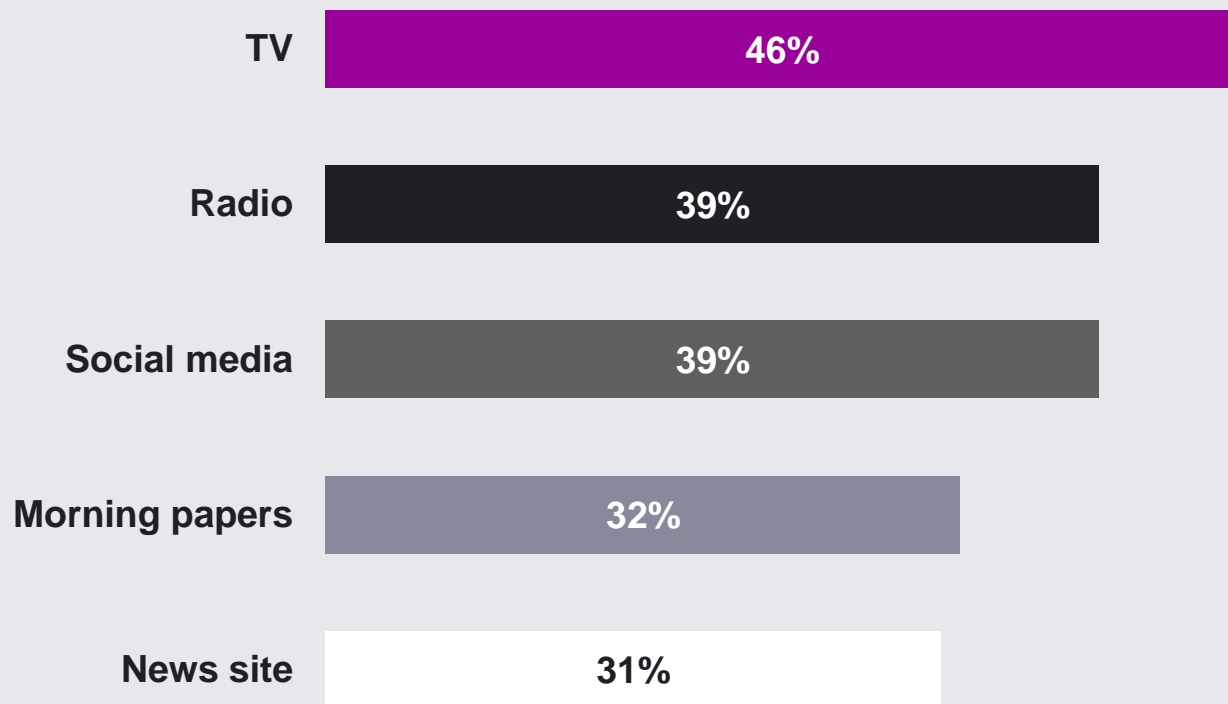


71% of respondents believe that TV is the most credible media in the **COVID-19 crisis**.

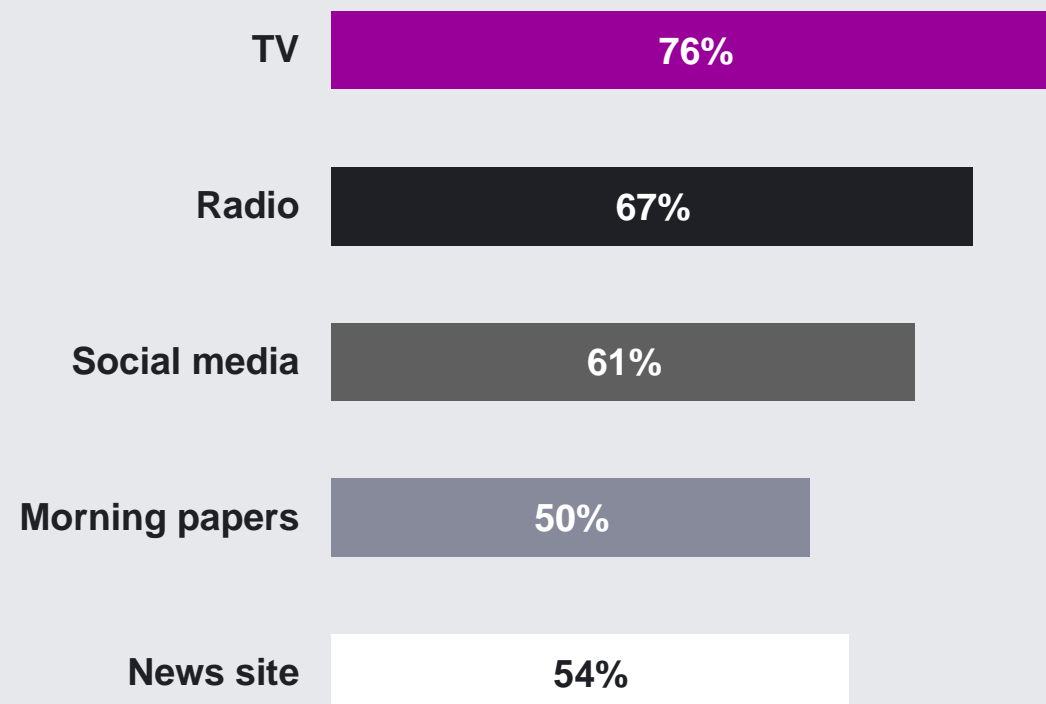
TV is our main source for news

% of adults who take part of news on each platform on a daily and weekly basis

% daily reach

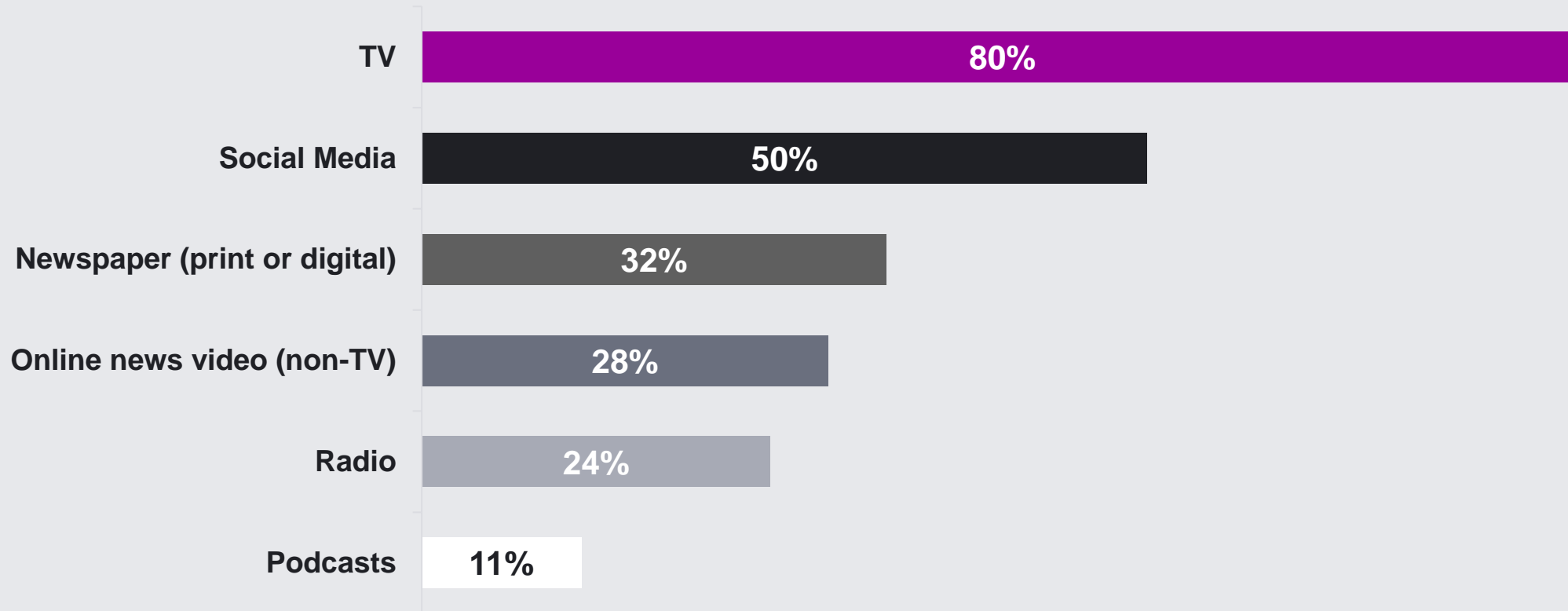


% weekly reach

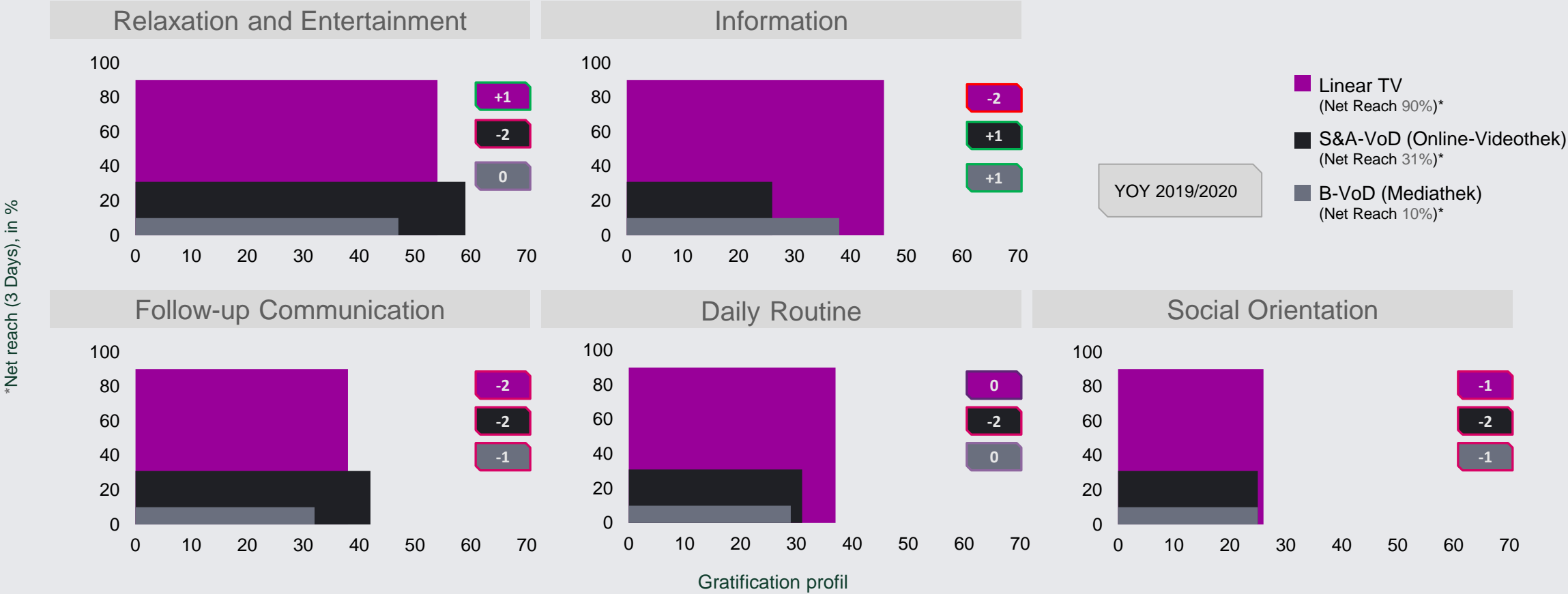


TV is our main source for news

% of adults who often get news on each platform

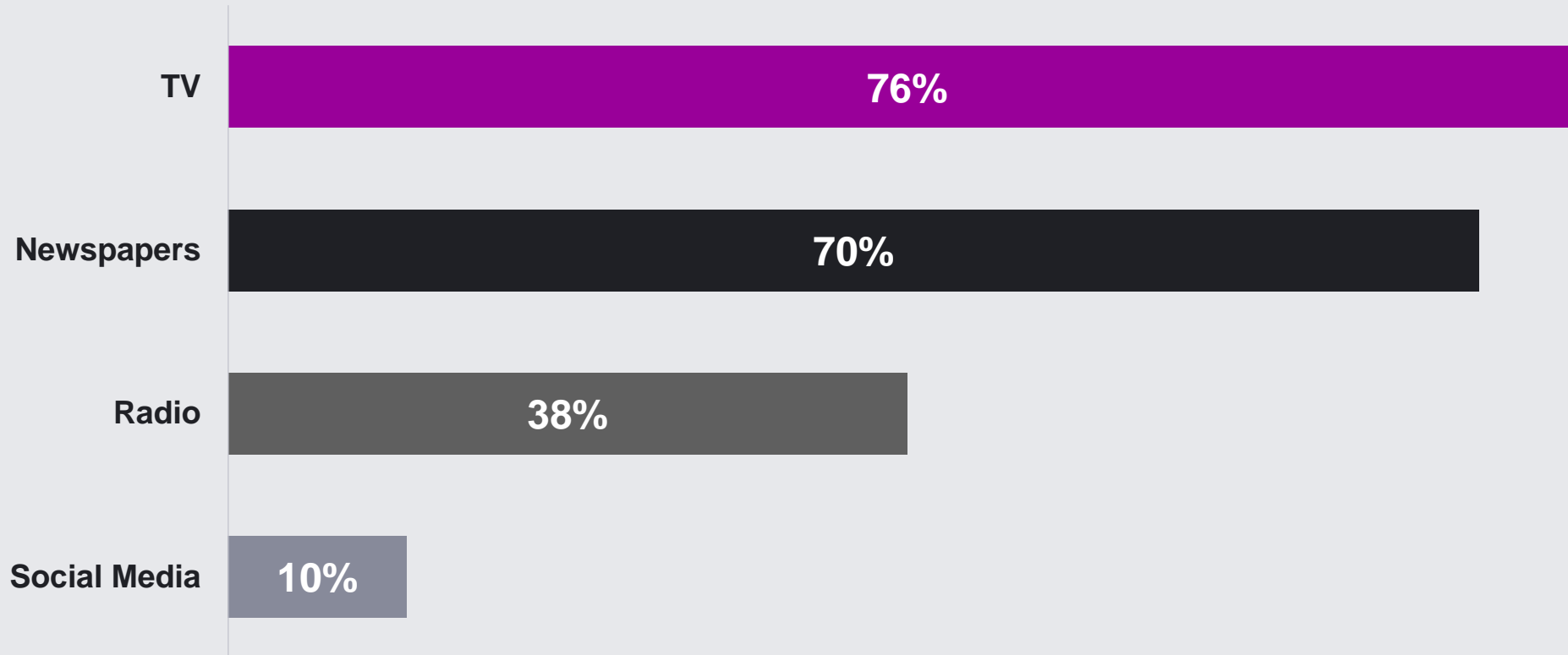


TV stands for high quality information and daily routine



TV is the most trusted source for news

% of adults that have trust in a medium as source of news



Trust in TV advertising

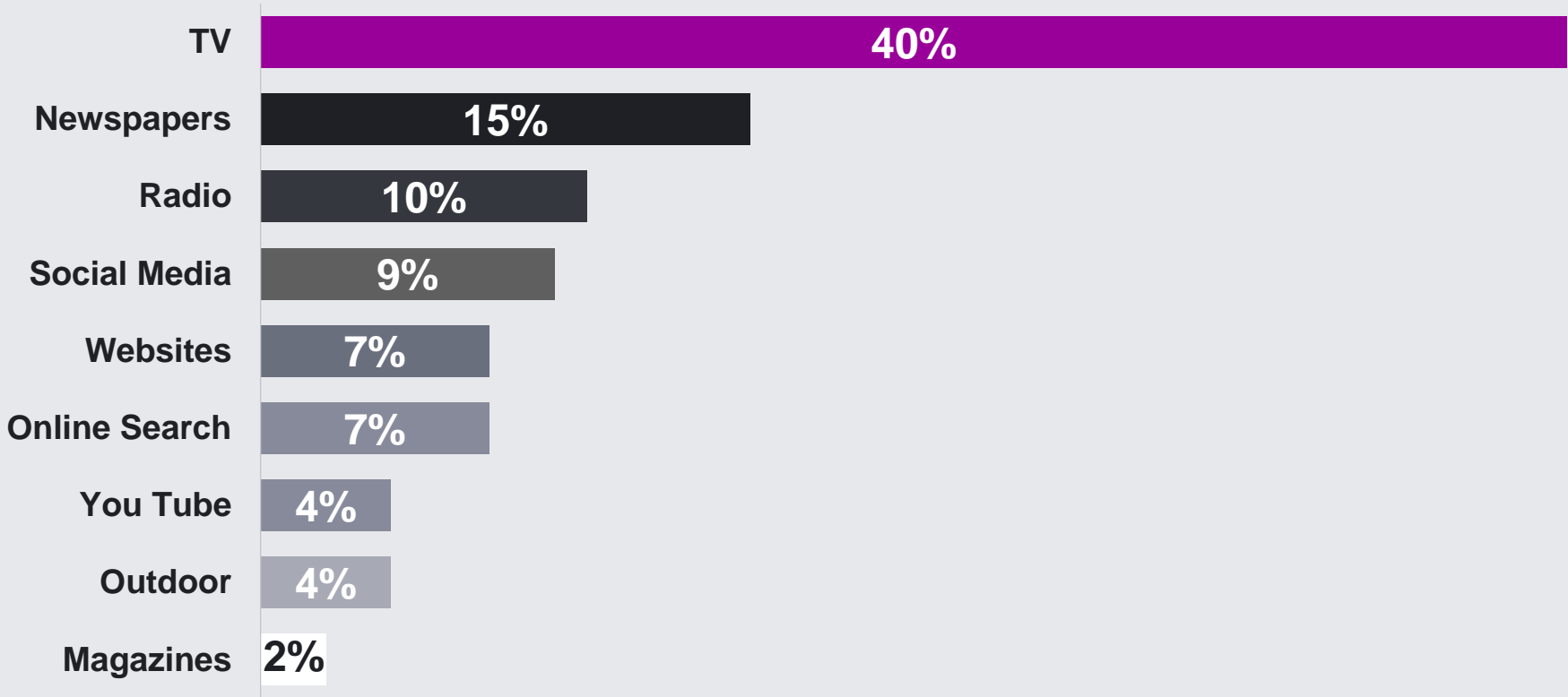
“Our advert has had such a **positive impact** on the Village as whole. Incredibly our village bus driver has been approached by people in towns 20 miles away having **recognised our logo from the TV ad**. This has never happened before.”

Karen Slater, Regional Director Auchlochan

November 2019

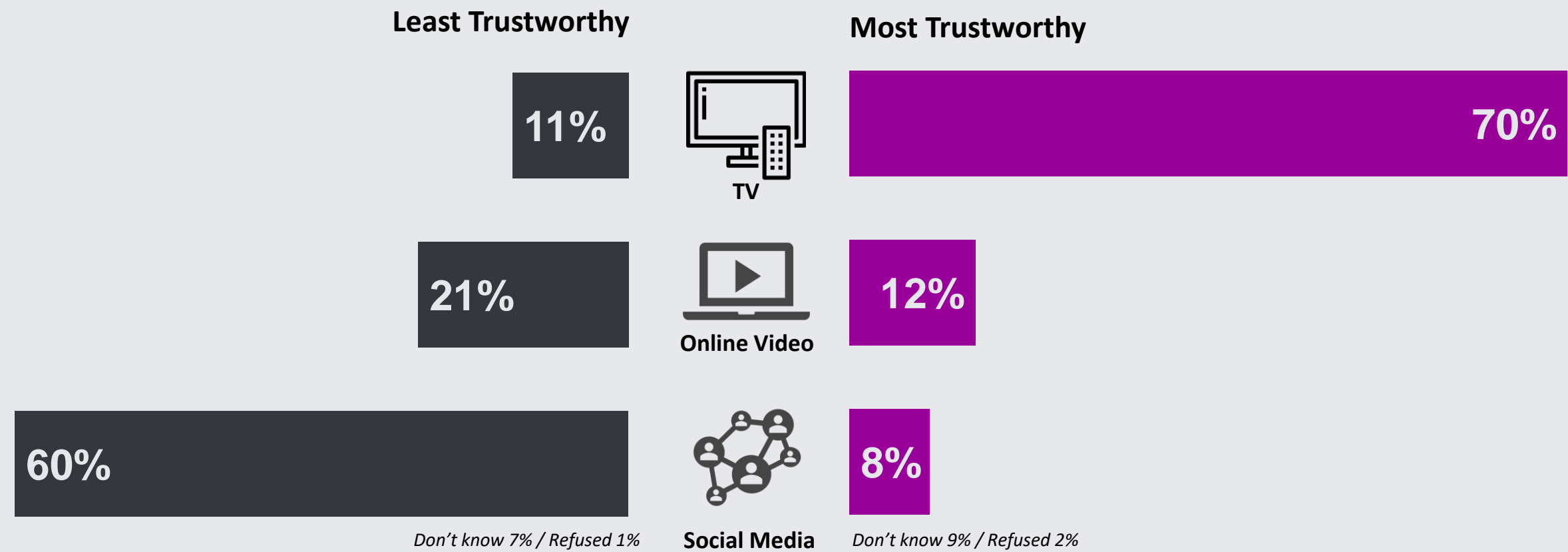
Australians trust TV advertising the most

% of adults who often get news on each platform



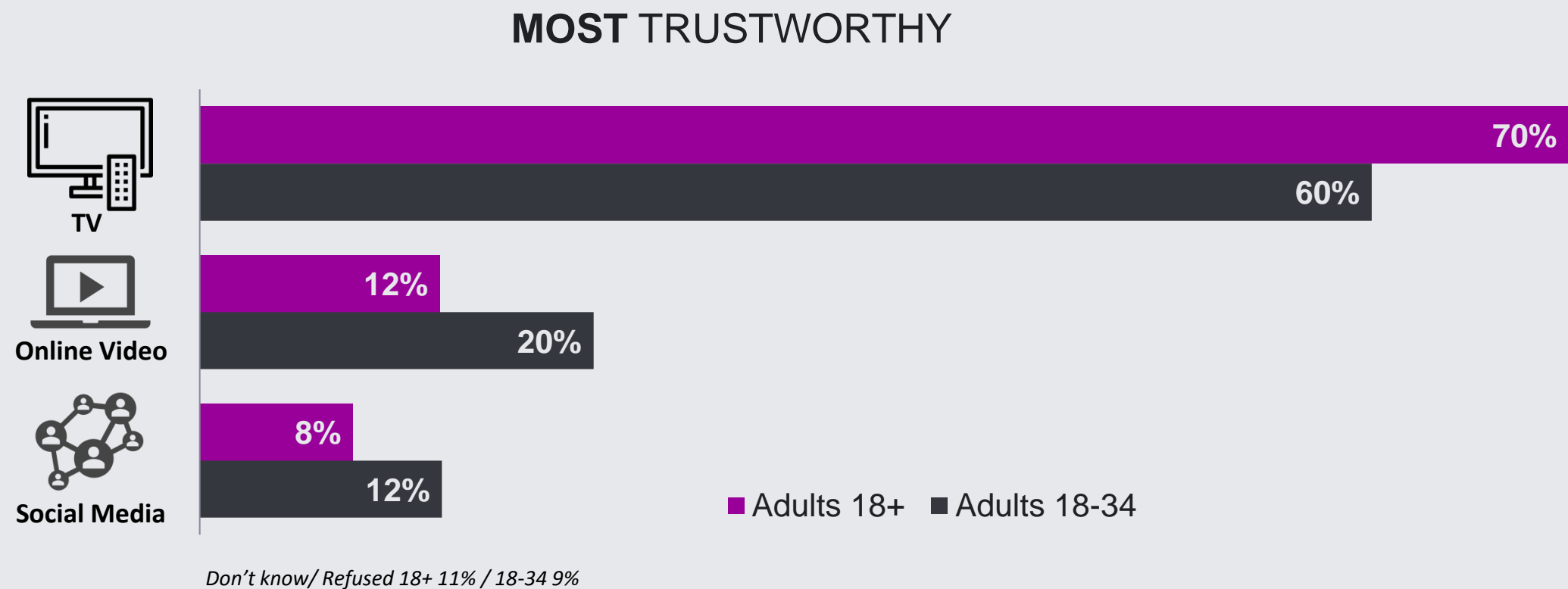
TV is the most trusted medium

Q: Which one of the following media carries video advertising that you believe to be most trustworthy? Least trustworthy



TV is most trusted across all demos

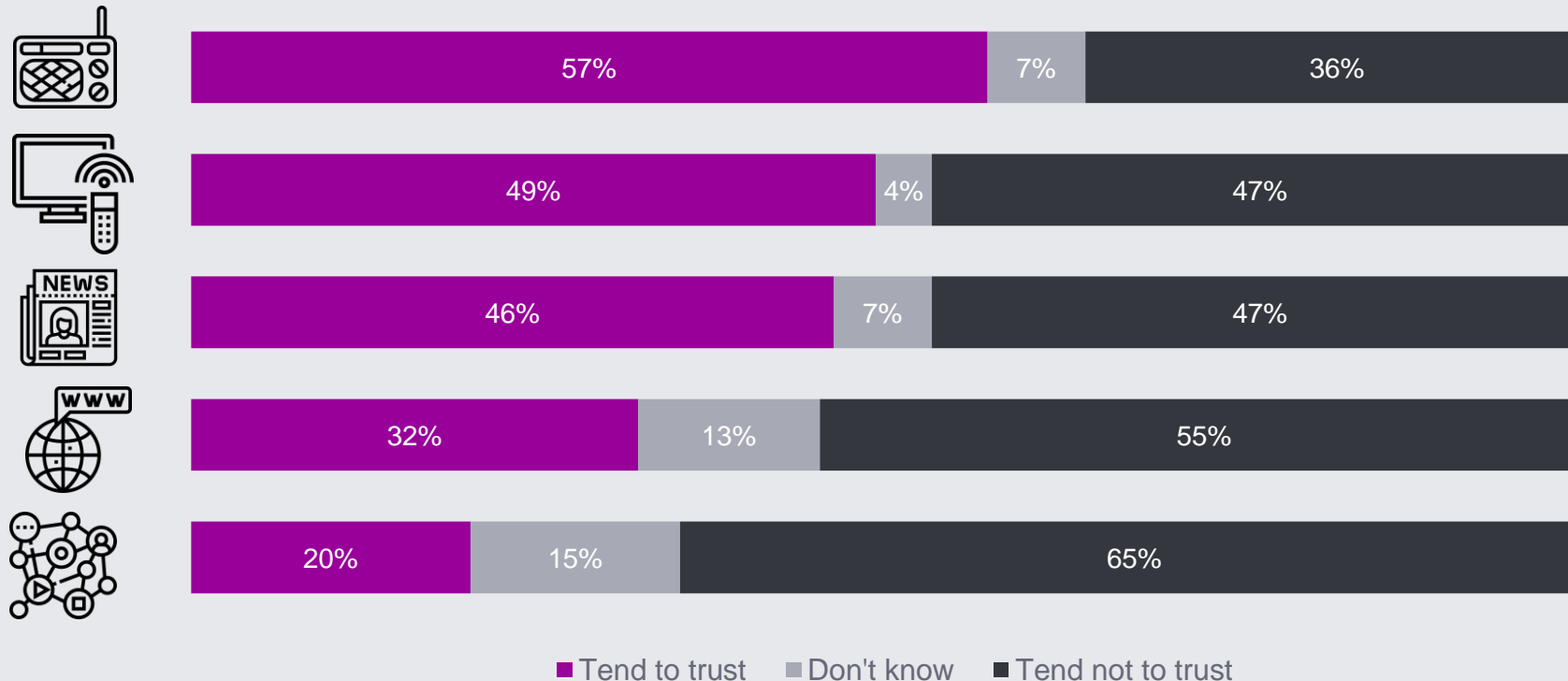
Q: Which one of the following media carries video advertising that you believe to be most trustworthy?



Across Europe, TV & radio are the most trusted

At EU level, traditional media enjoy the highest trust level

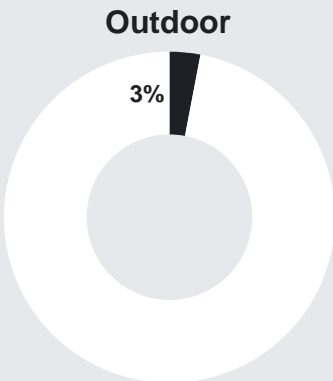
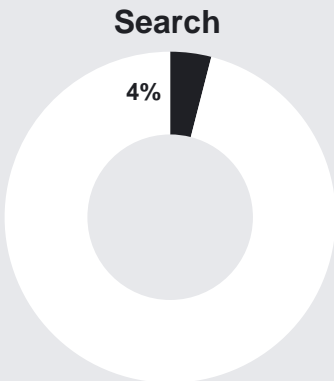
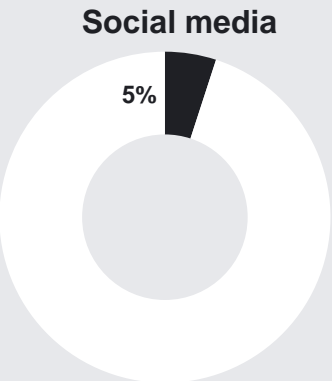
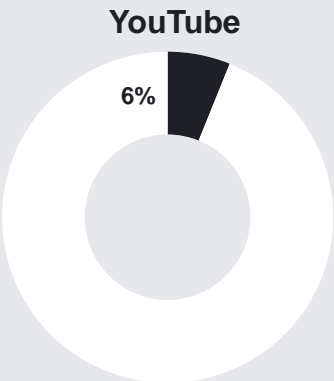
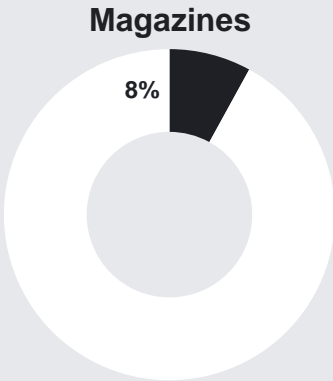
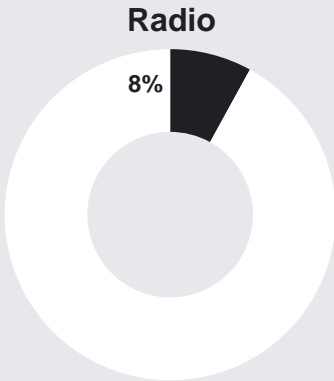
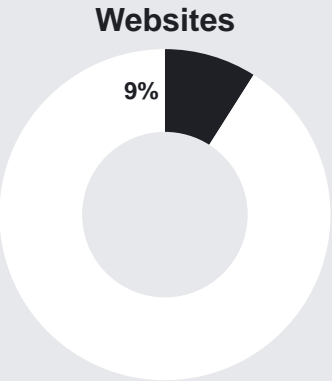
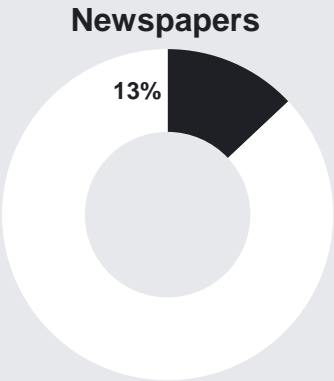
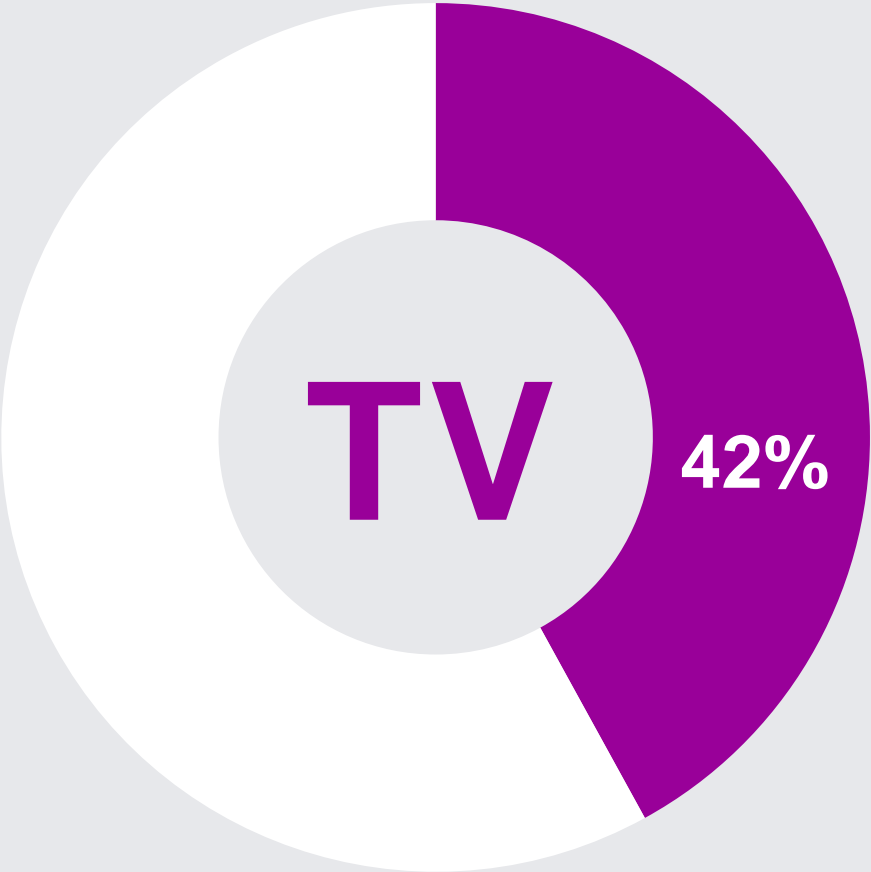
Trust in Media in the EU (% of population, 2019)



- Nearly half of EU citizens trust TV. Almost equal shares of citizens tend to trust and not to trust the written press.
- The Internet and social networks are the least trusted media at EU level.

Note: Survey results at EU level represent a weighted average across the 28 EU Member States, applying official population figures provided by EUROSTAT.

TV is by far the most trusted form of advertising



TV ads get the most attention

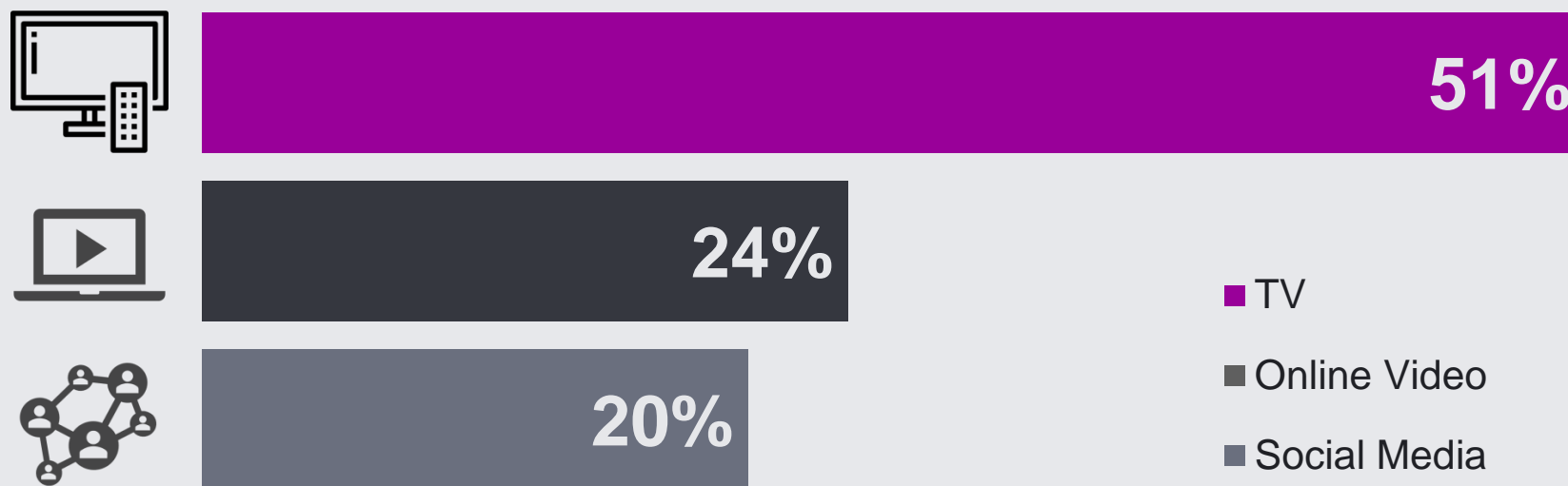
“The campaign delivered **above and beyond our expectations**, to not only successfully engage our two audiences*, but more importantly, help us surpass our **sales targets** and maintain our leading position as the #1 cheese snack format during the World Cup for both audiences.”

Celina Leroyer, Brand Manager, Mini Babybel

December 2019

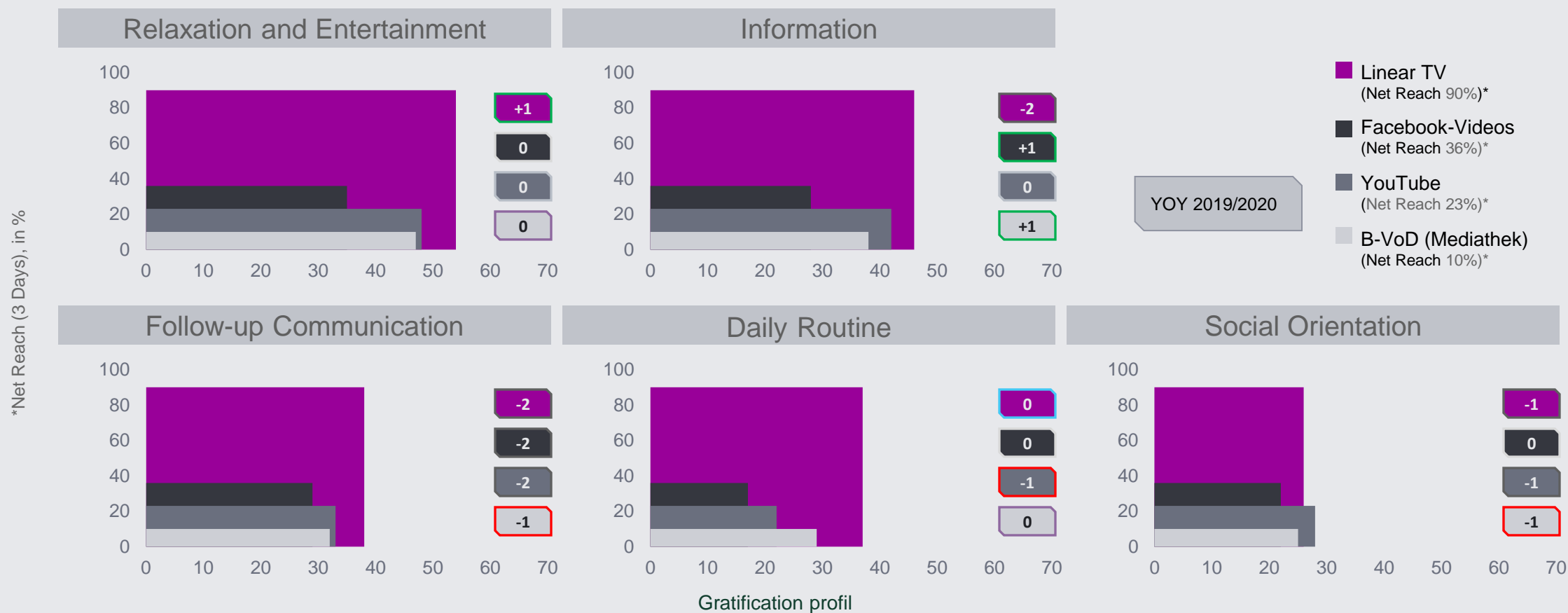
TV advertising gets the most attention

Q: Which one of the following media carries video advertising that best captures your attention?



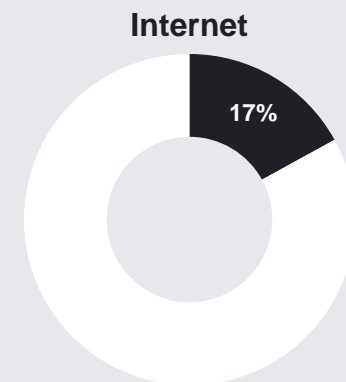
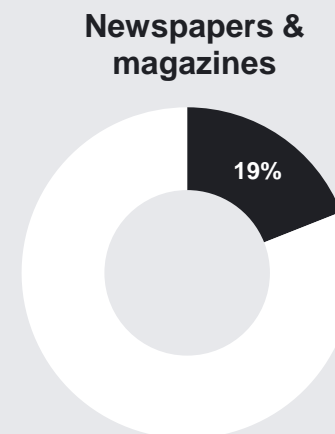
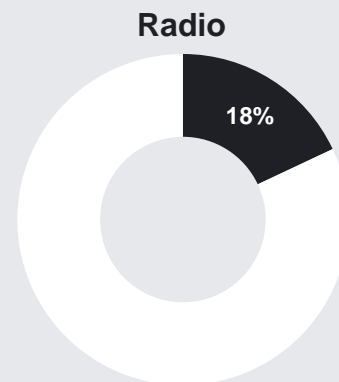
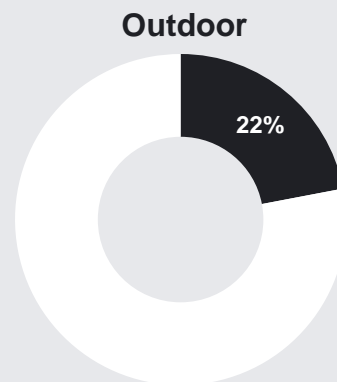
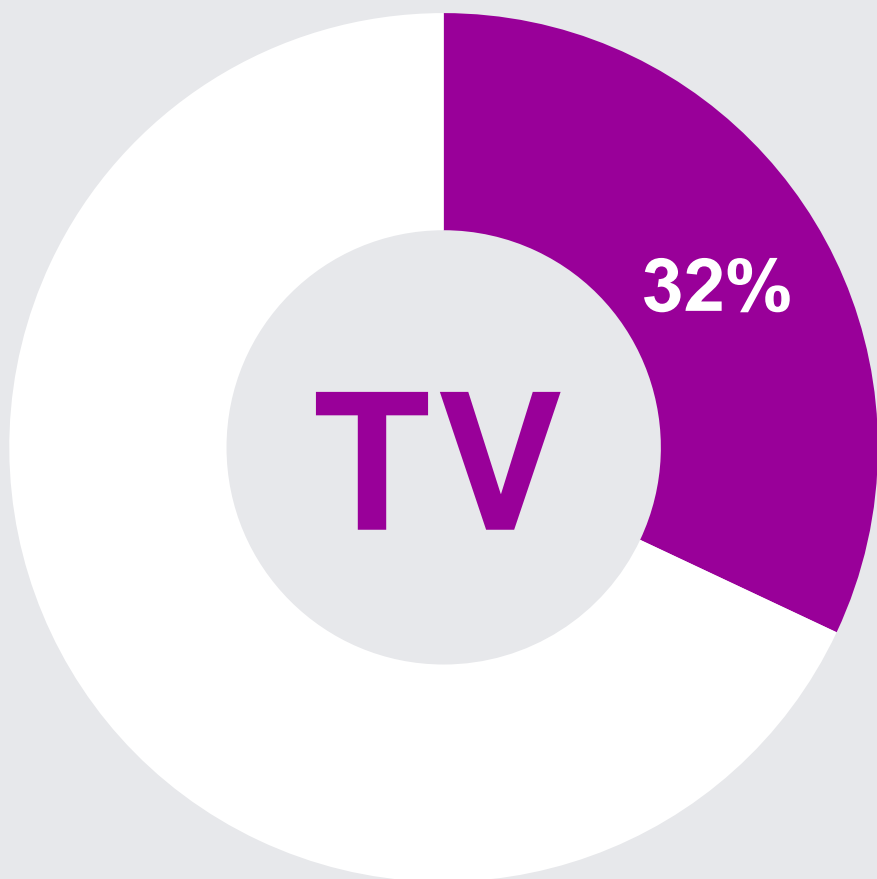
*Don't know = 4%

TV offers the most comprehensive gratification profile compared to Facebook and YouTube



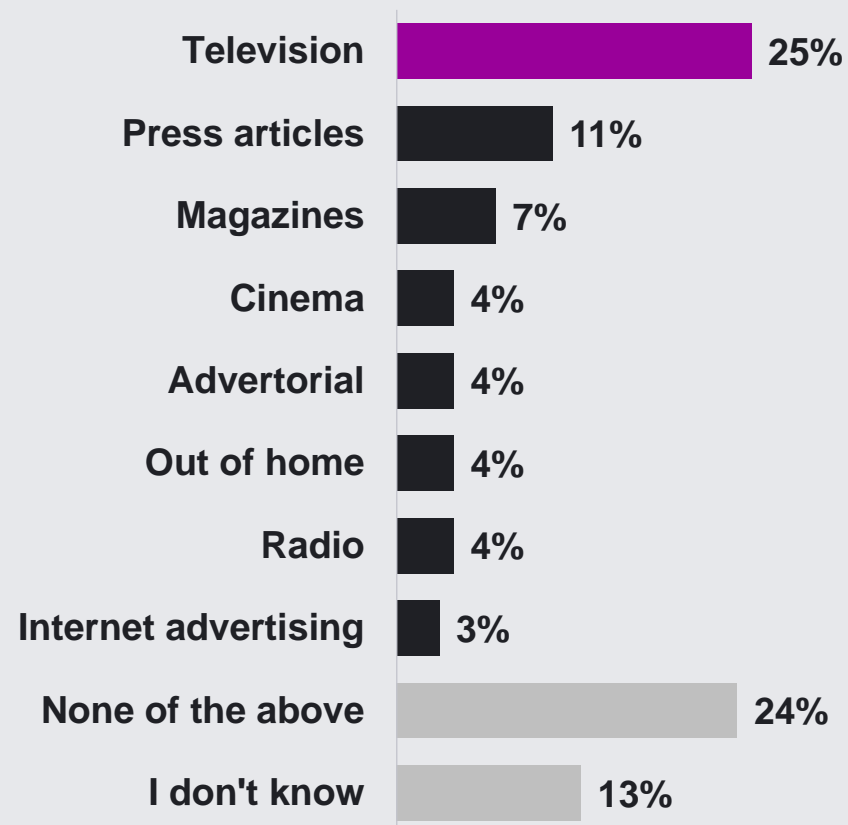
TV is by far the most useful form of advertising

Q: Do you think that these kinds of advertisements are useful for you? Do they give you useful information?

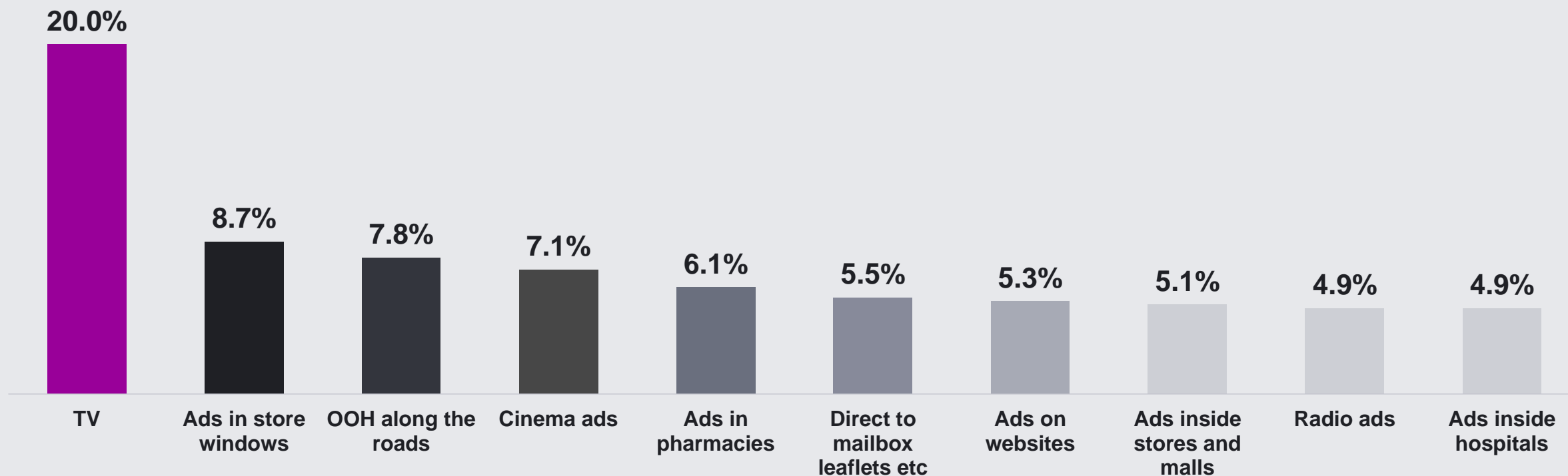


We trust TV advertising the most

Q: Amongst the following, in which media do you find advertising that you trust the most ?

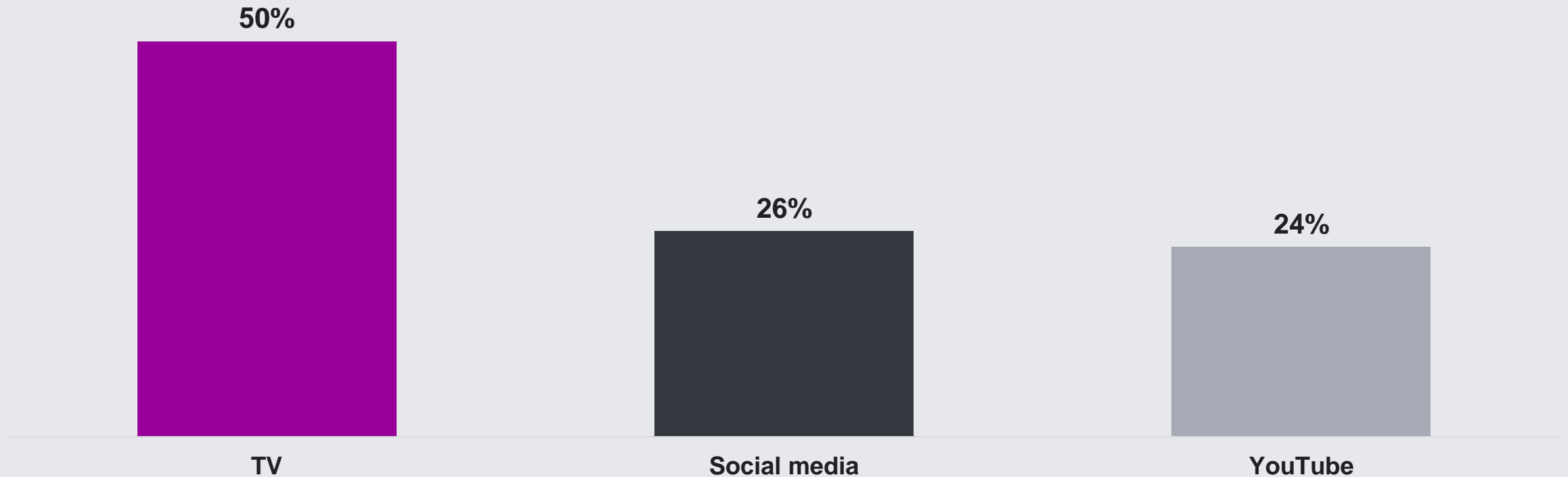


TV advertising gets the most attention

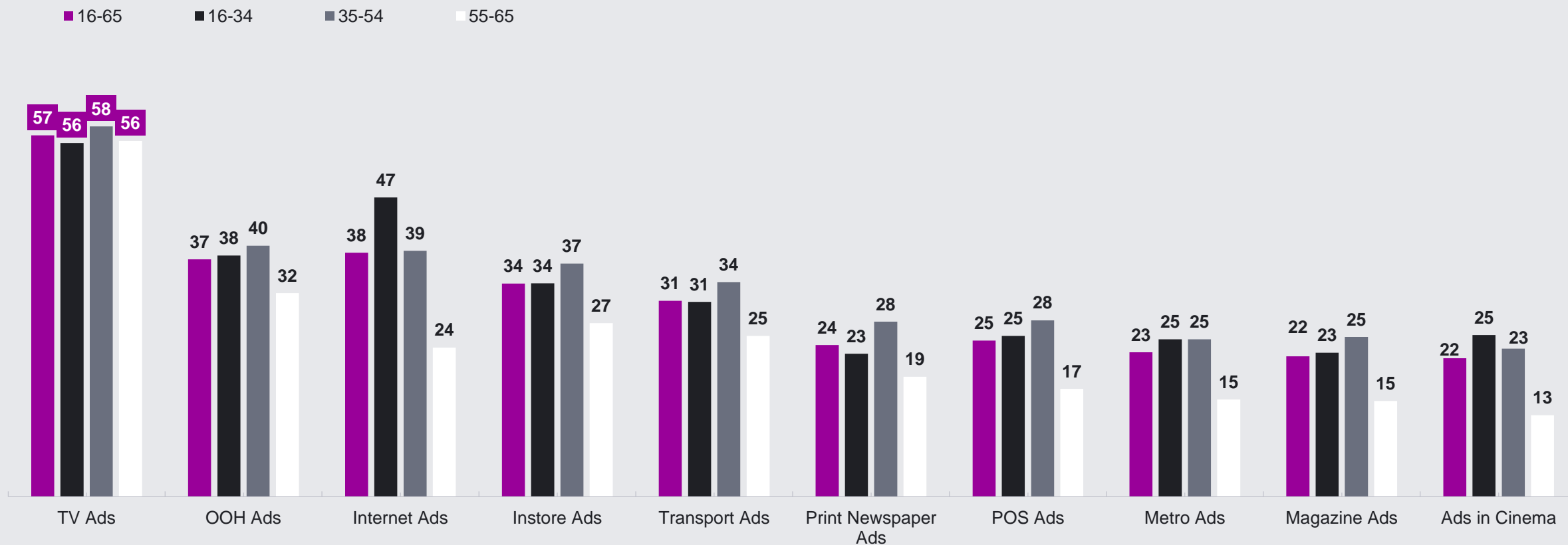


Young People notice TV advertising most

On which medium (TV, Social Media, YouTube) do you notice advertising most?



TV advertising gets the most attention



Effectiveness

Advertisers invest in TV advertising because it pays back



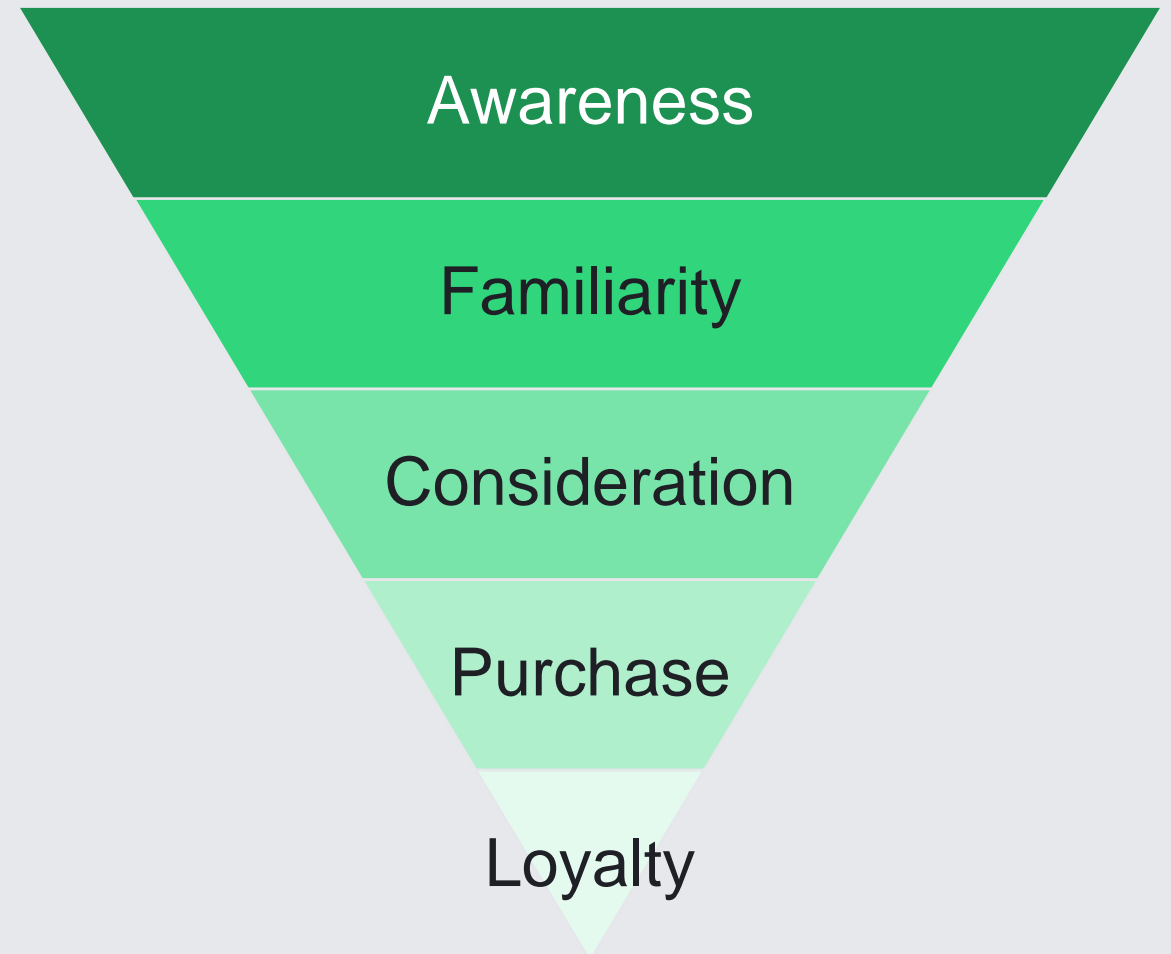
TV works throughout the funnel

TV is your best store-front window

- Top of the Funnel
- Awareness
- Brand building
- Interest / purchase intent

Bottom of the Funnel

- Activation via sales promotions messages
- TV ads drive website visits
- Thanks to digital, you can literally buy online while watching the TV commercial



“TV has been at the foundation of driving the transformation and reinvigoration of our brand. It is a mainstay of our communications strategy and plays a **fundamental role in driving awareness** of our key brand assets and the most important medium for driving long-term emotional connection with our brands.”

Sarah Koppens, UK Marketing Director, Birds Eye

April 2020

“Addressable will be a critical complement to broad-reach TV in the purchase funnel. The value is reaching consumers who are not in your target today but could be tomorrow. Or someone who is not in your target but could be a word of mouth to someone who’s in your target. So there’s a value in **reaching people outside of your target** and addressability is about just reaching that target effectively. They’ll coexist together but we don’t see a world where it’s entirely addressable.”

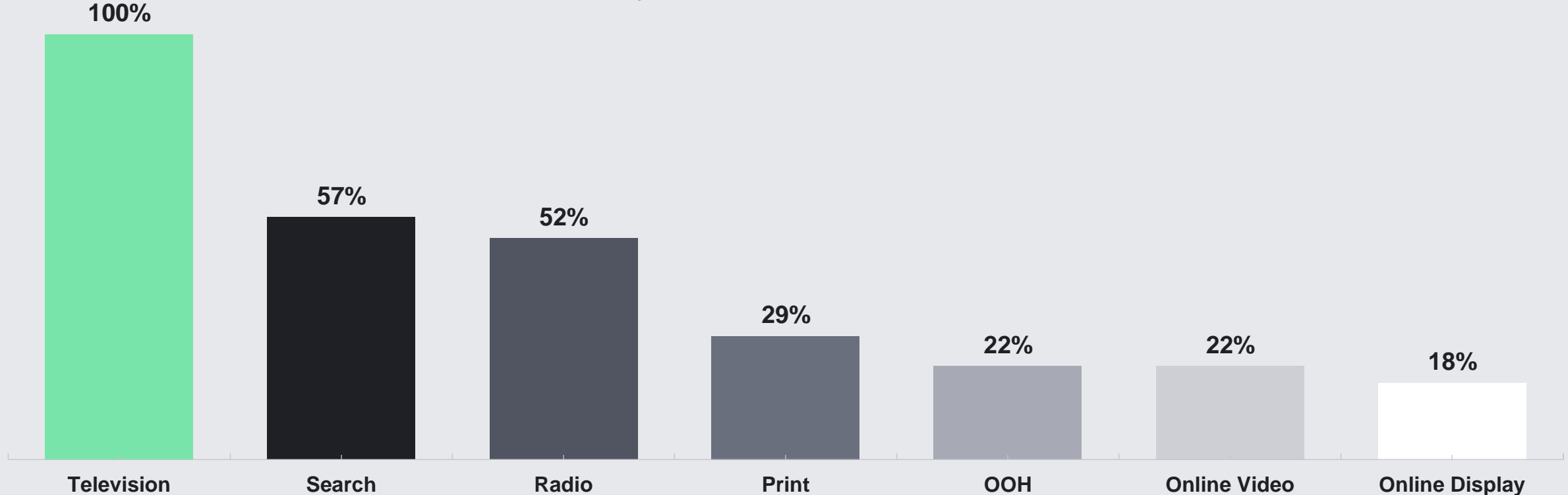
David Campanelli, EVP, Co-Chief Investment Officer, Horizon Media

October 2018

TV is the most efficient media channel

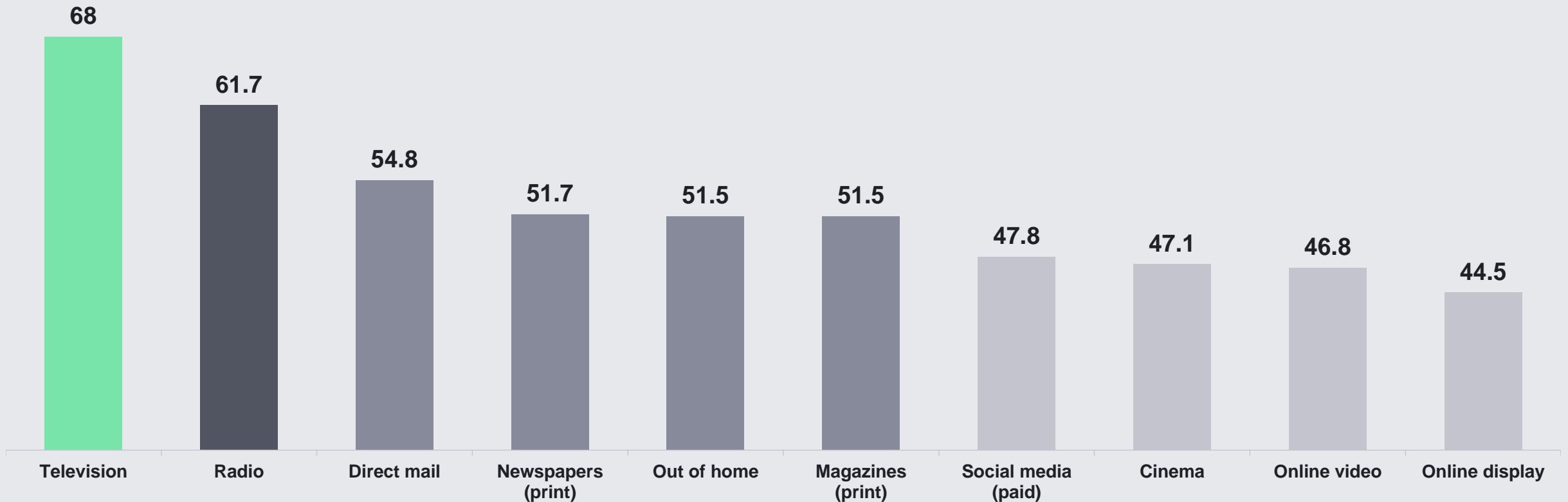
When indexed across advertisers drawn from 4 of the biggest sectors – FMCGs, Auto, Finance, and E Commerce. Tv is almost twice as efficient as Search – which index's 57% of Tv's efficiency.

Overall Efficiency: Media Channel ROI Indexed to TV



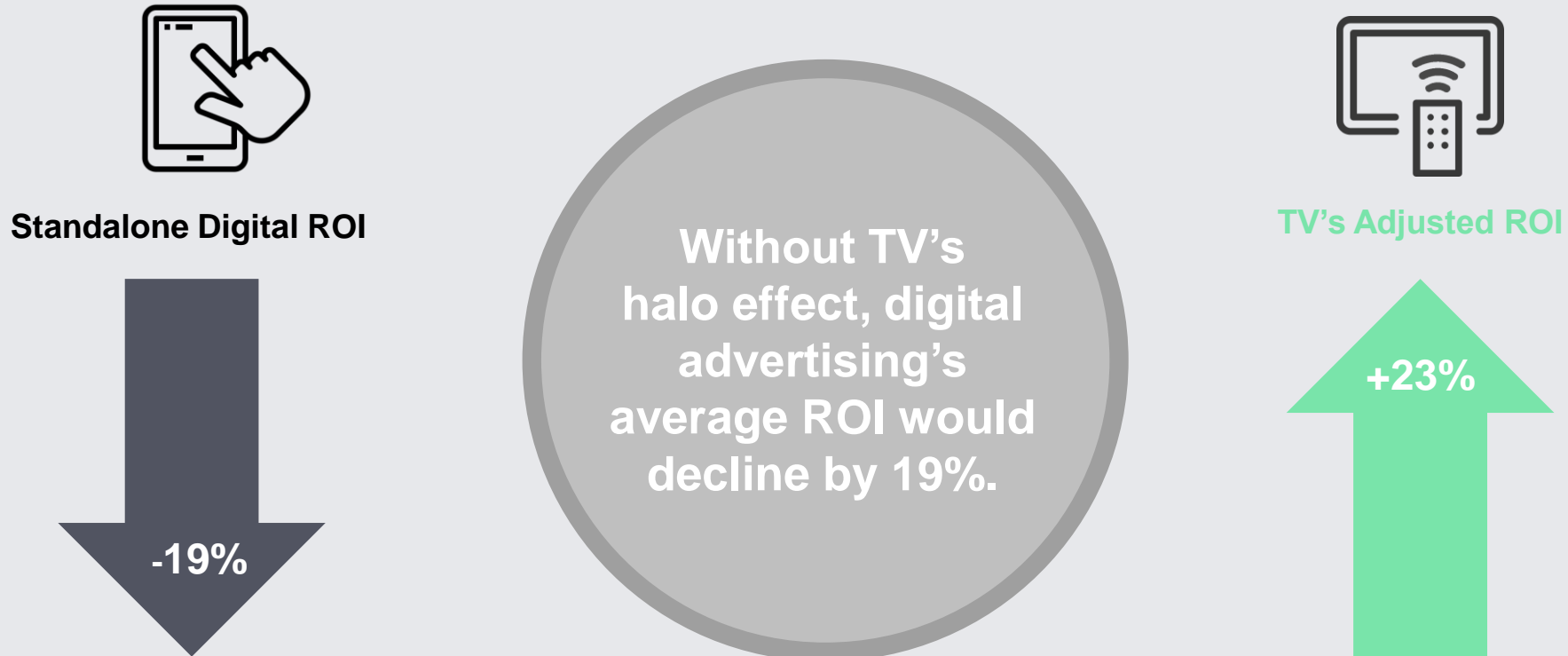
TV scores best in delivering campaigns that grow a business in the long term

Sum of the weighted scores of each medium on 9 attributes that matter most to advertisers



TV improves digital's performance

TV has a significant halo effect on digital media, increasing it's sales ROI by 19%



TV delivers the best ROI

Driving \$14.34 in return for every dollar spent

ATTRIBUTED SALES ROI BY MEDIA CHANNEL



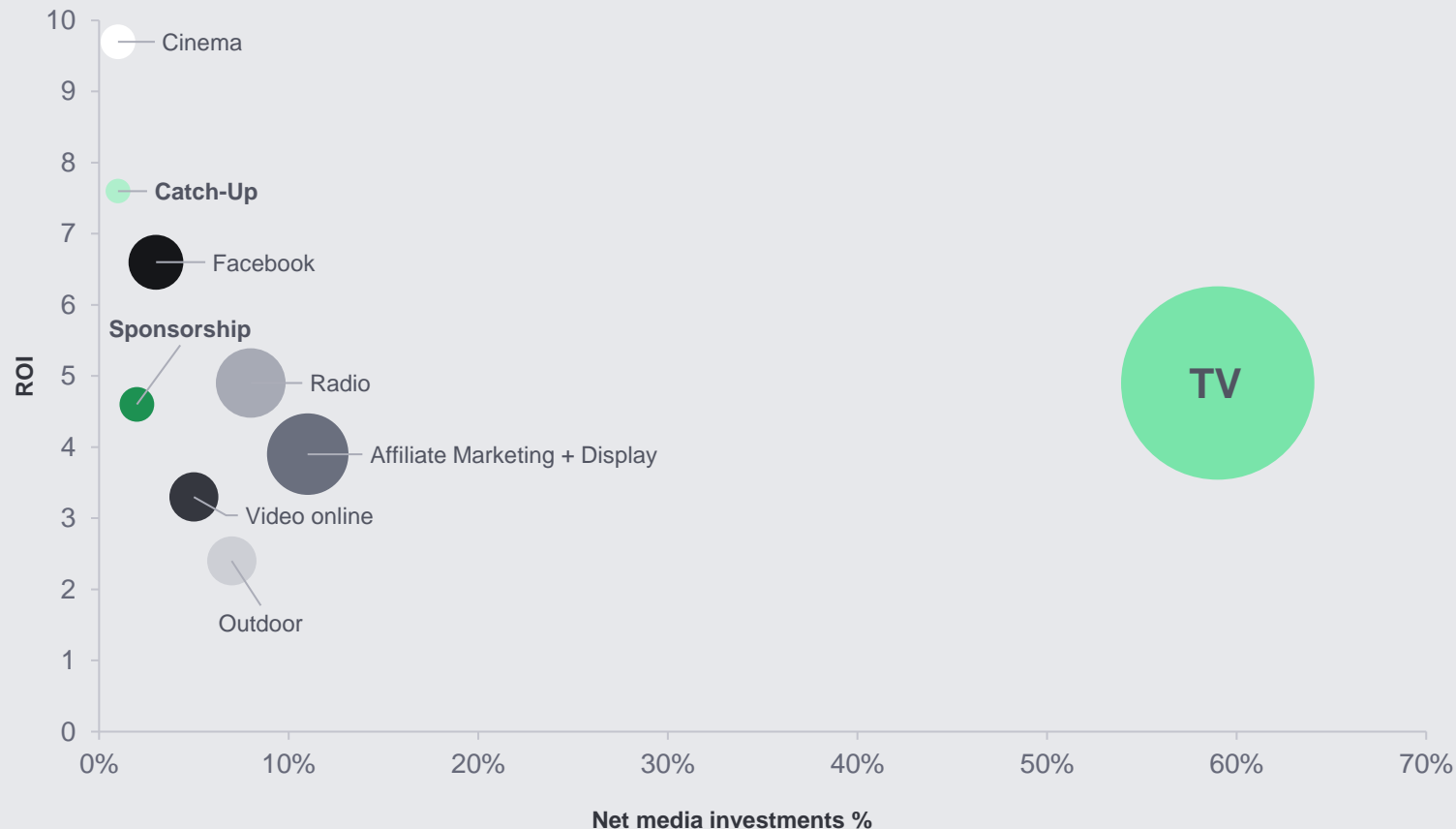
TV ads are the best for brand recall

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



TV is by far the most effective form of advertising

TV's R.O.I. and contribution to sales is unbeatable: 4.9 € for 1 € invested. About 2/3 (65%) of the media effectiveness can be attributed to television.



ROI

- TV* - 4,9
- Catch-up – 7,6
- Sponsorship – 4,6
- Radio* – 4,9
- Display* – 2,4
- Cinema* – 9,7
- Video online* – 3,3
- Affiliate Marketing + Display* – 3,9
- Facebook – 6,6

i Size of circles in proportion to the contribution to sales

* Contributions ≥ 5%

TV's effectiveness on the long and short term

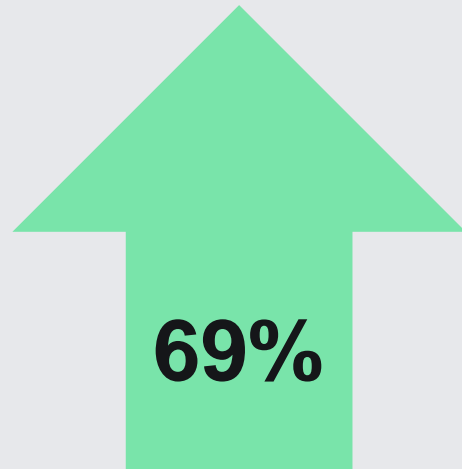


	ROI	Carry-over effect	Long term effect*
TV	4,9	26 days	211
TV catch-up	7,6	29 days	193
TV sponsorship	4,6	22 days	195

TV drives traffic to the web

On average, there is a 61% increase in traffic to an advertiser's website (and/or mobile app) during a TV campaign.

This increase is even stronger for e-commerce advertisers (also called D2C or “pure player”).



e-commerce brands



“Click and Mortar” brands

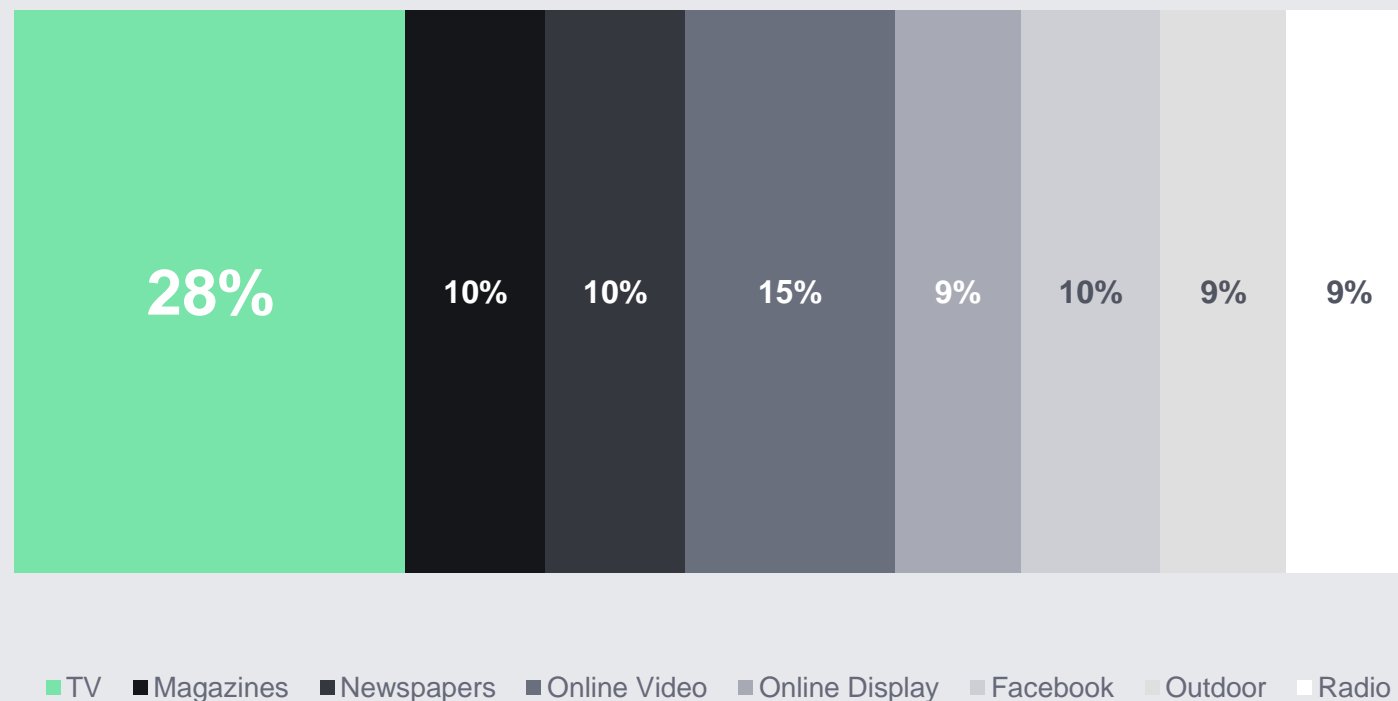


Good to know: Brands whose website usually get low traffic (less than 25 000 per month) experience an even bigger uplift in traffic: on average +166%.

TV is one of the best media that generates the highest brand equity

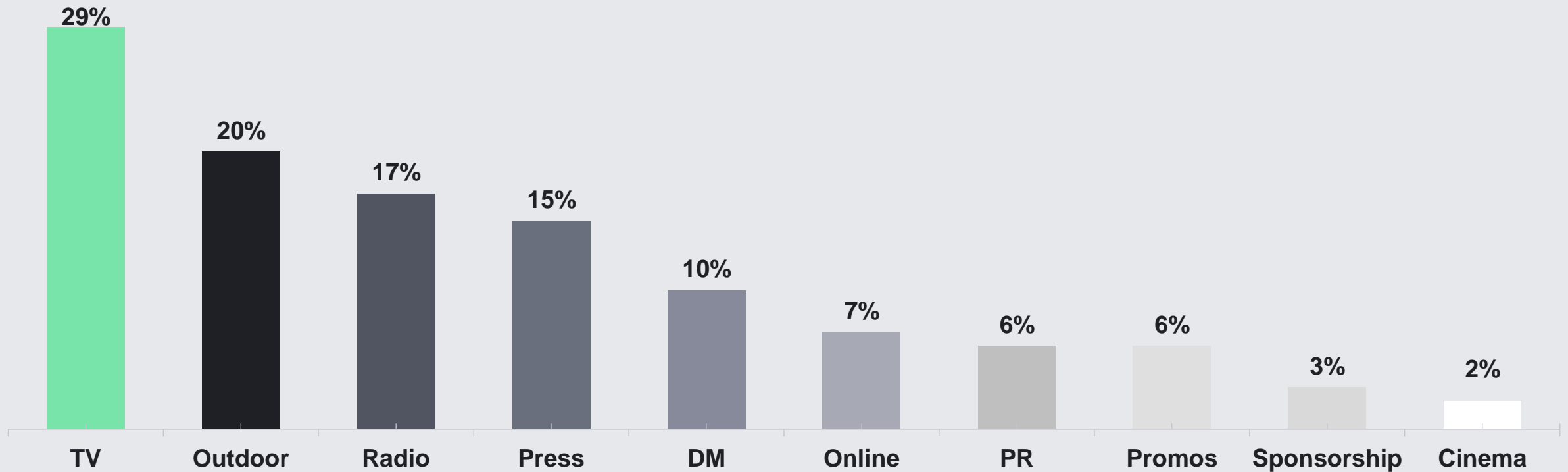
Share of contribution to brand equity

With online broken down by its main formats and platforms, TV becomes the media with the highest contribution to brand metrics.



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.)



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 %

	TV	Digital
 Hotels.com™	100,0%	0,0%
 Vinted	97,6%	2,4%
 JUST EAT	95,9%	0,4%
 trivago	95,7%	4,3%
 AUTO 1.com	90,2%	6,2%
 eltenedor <small>a TripAdvisor company</small>	86,4%	0,2%
 priceline	86,0%	13,8%
 mestic	80,2%	1,5%

Source: Arce media, 2019

“TV works very well for us. It’s where we are spending a **significant portion of our brand marketing** ad dollars.”

Vic Walia, Global Marketing Vice President, Expedia Group

June 2018

“Our brand is only a little over six years old and we’ve been able to build it as a **household brand** in the US very quickly over just the last few years. Without using television, I don’t think we would be where we are today.”

Niraj Shah, Co-Founder, Wayfair

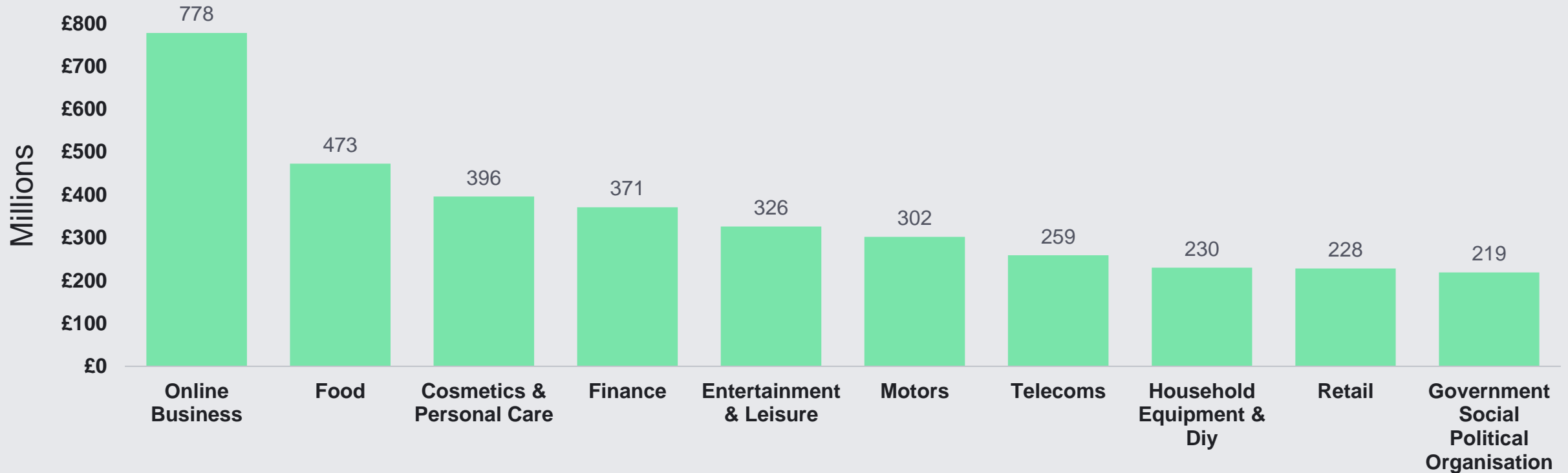
May 2018

“A lot of people oftentimes don’t understand the economics of TV and how to measure it. TV can be less expensive and more beneficial than digital. It just takes more to get an initial test off the ground, but from a CPM basis, it’s comparable, if not better, in some places, especially now that people are buying for these hyper-targeted custom audiences in digital.”

David Webb, Director of Growth & Analytics, **HelloFresh**

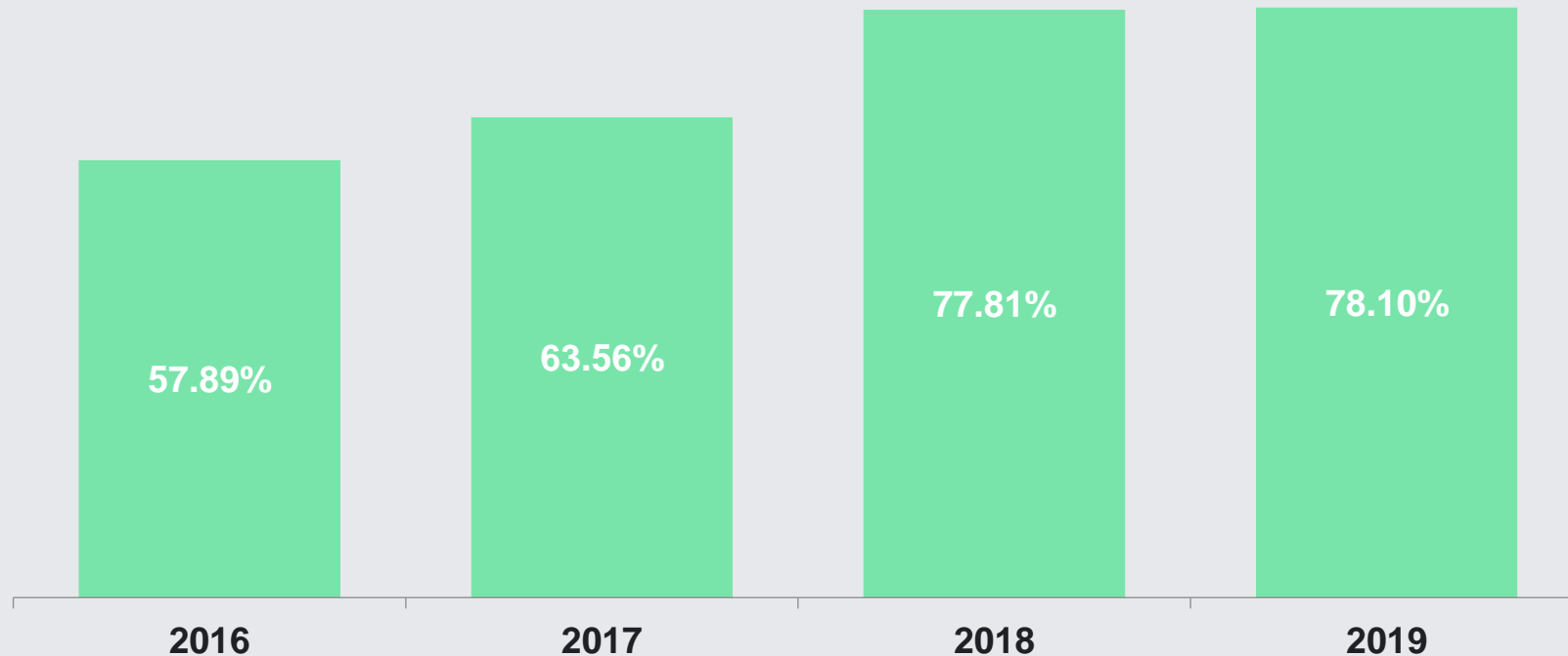
June 2018

Online businesses are the biggest investors in TV



Online advertisers' TV investment has grown significantly

The share of TV within the total media adspend of online players has been increasing constantly since 2016.



Sample of the top online advertisers

NETFLIX

Uber

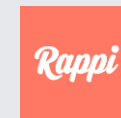


mercado
libre

trivago®

amazon

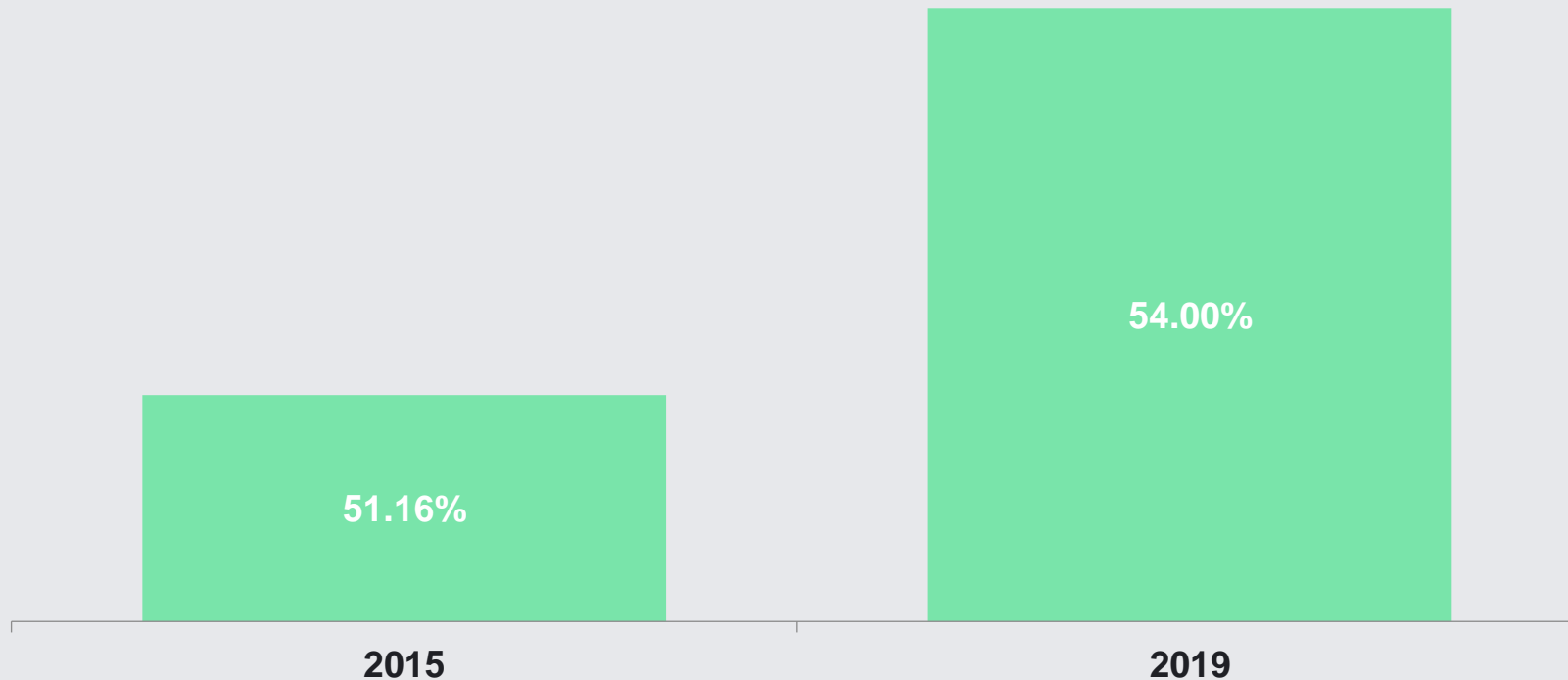
despegar



iünigo

Online advertisers' TV investment remains dominant

The share of TV within the total media adspend of online players continues to be more than half their total media expenditure



Sample of the top online advertisers

sportsbet
.com.au



Uber Eats

Uber

Ladbrokes

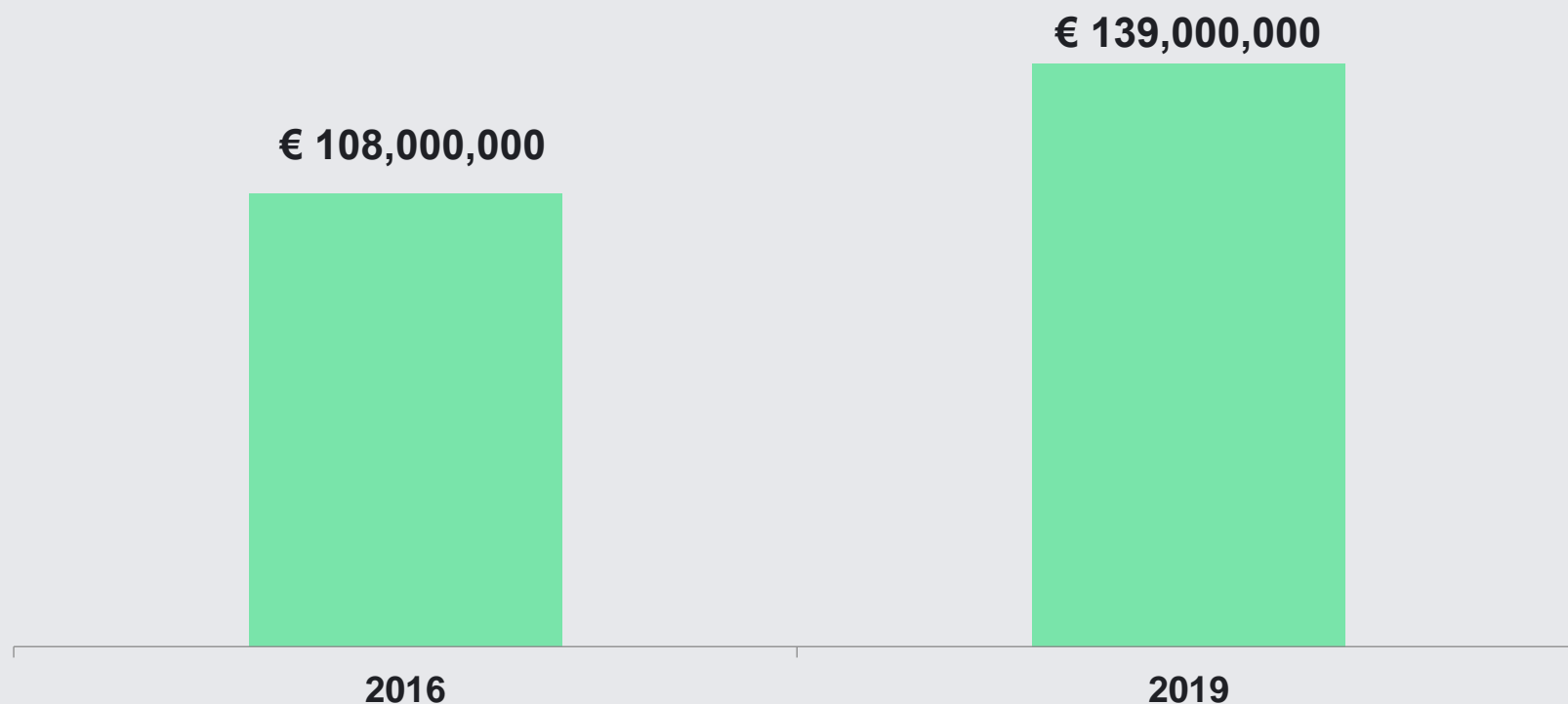
trivago®

SAMSUNG



e-commerce players' TV investment has grown significantly in only three years

The total TV adspend of e-commerce players increased by 28 % from €108M in 2016 to €139M in 2019.



Sample of e-commerce players

amazon

trivago®

derStandard.at

zalando

bet-at-home
.com

prime

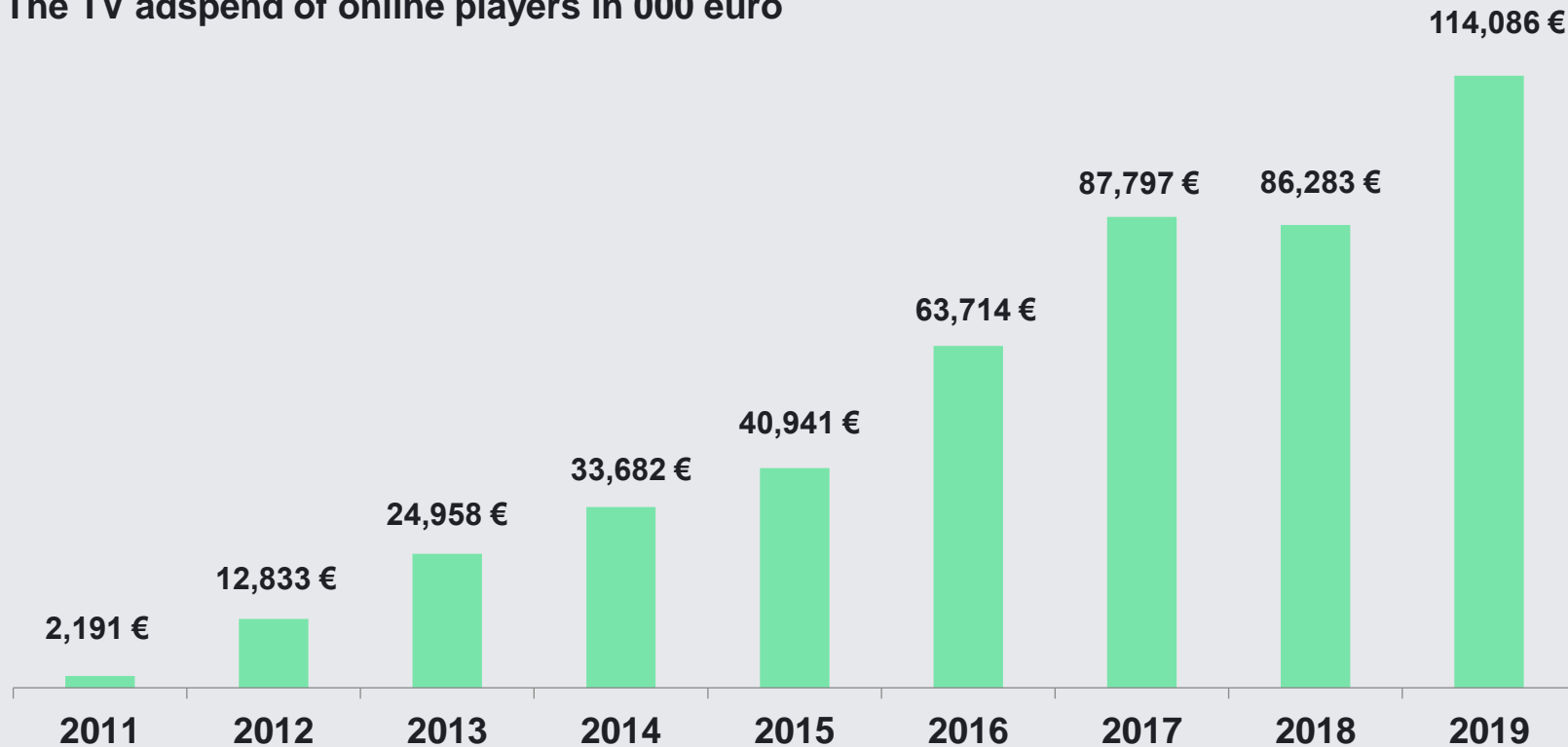
Parship ♥

Die Presse

Online advertisers' TV investment has grown significantly

The total TV adspend of e-commerce players keeps steadily increasing.

The TV adspend of online players in 000 euro

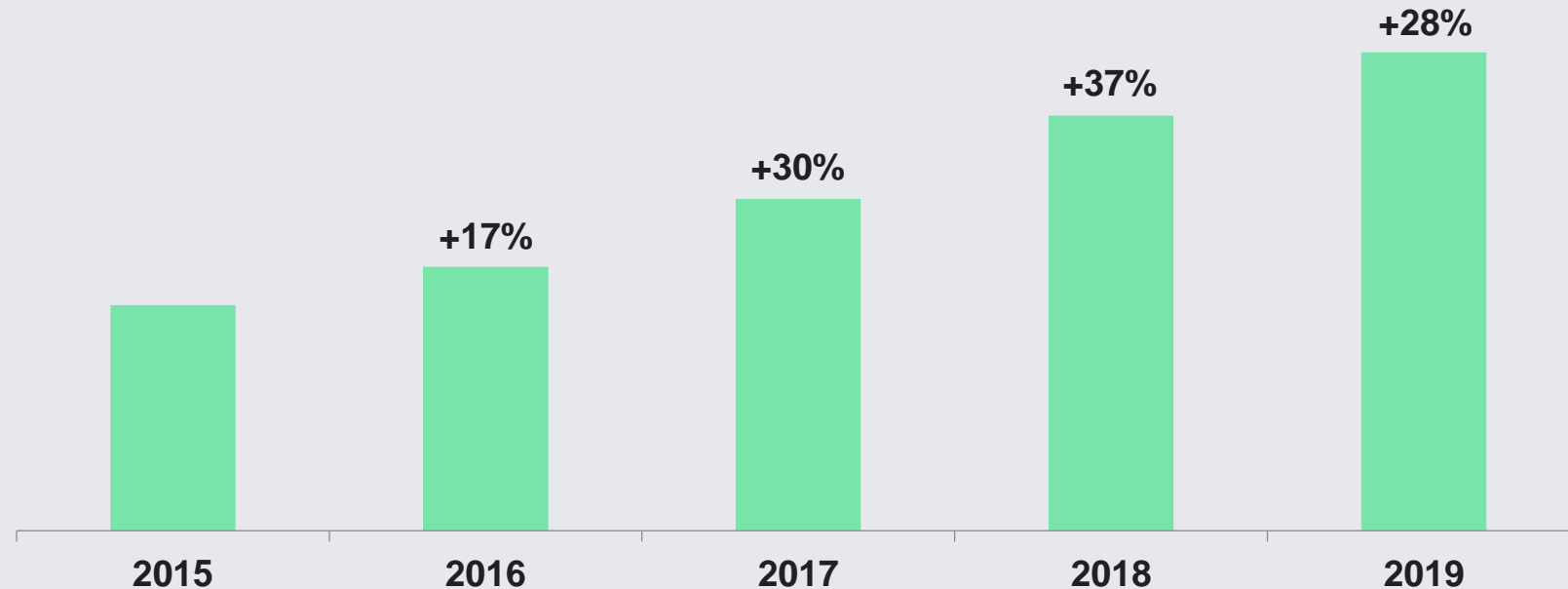


Sample of the top online advertisers



Online advertisers' TV investment has grown significantly

Internet-related businesses have collectively **upped their TV ad spend by 170%** over the past 4 years.

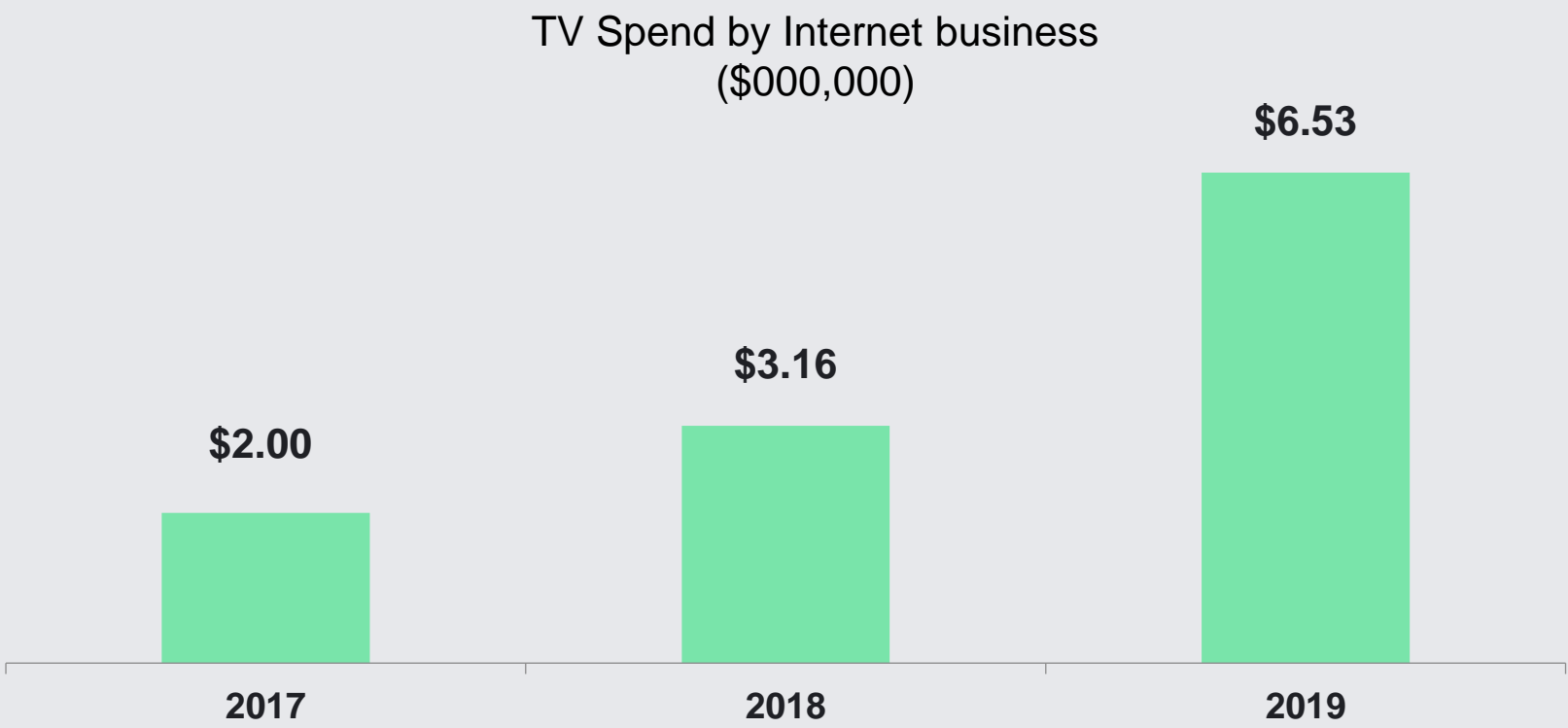


Sample of the top e-commerce advertisers



Online advertisers' TV investment has grown significantly

The share of TV within the total media ad spend of online players has been increasing constantly since 2017

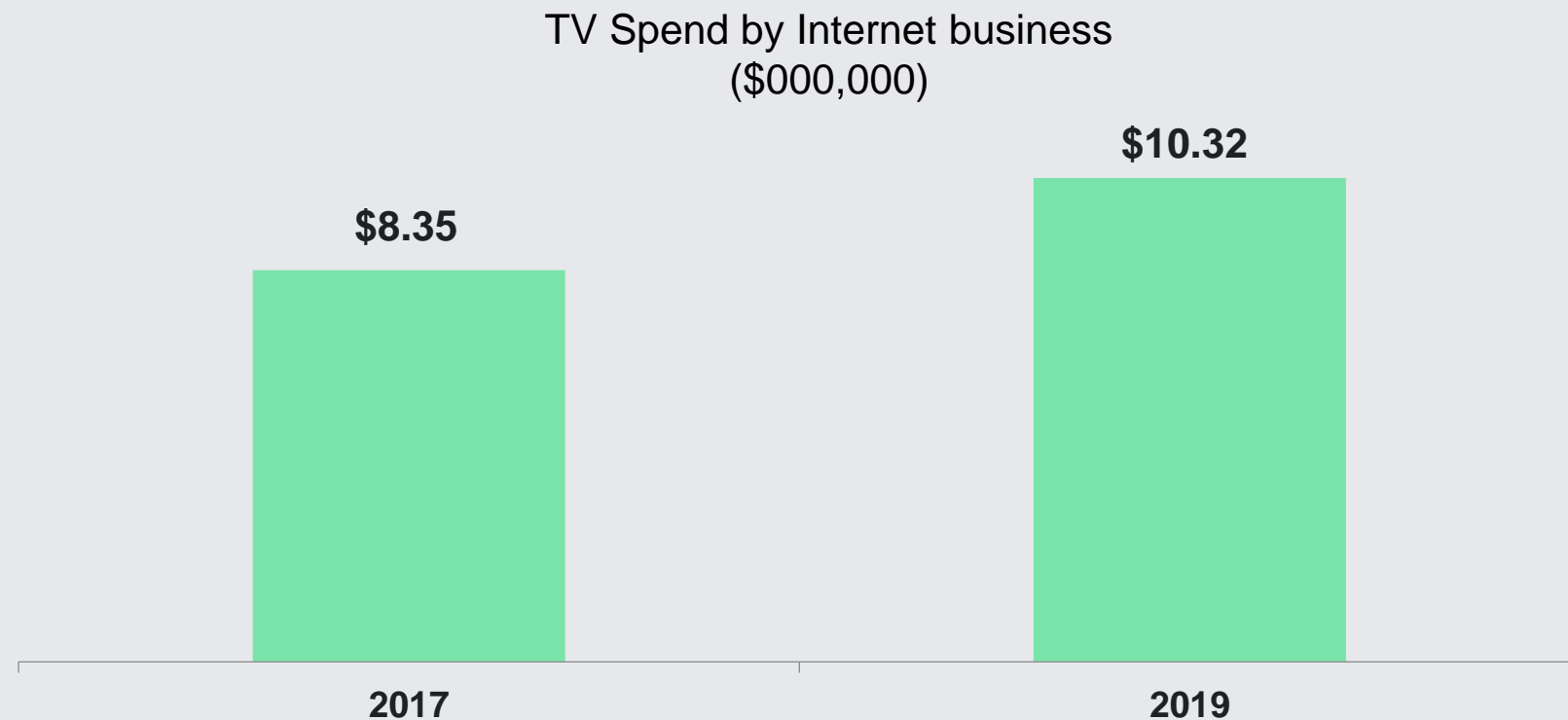


Sample of the top e-commerce advertisers



Online advertisers' TV investment has grown significantly

The total TV adspend of online services advertisers from grew almost 2 million



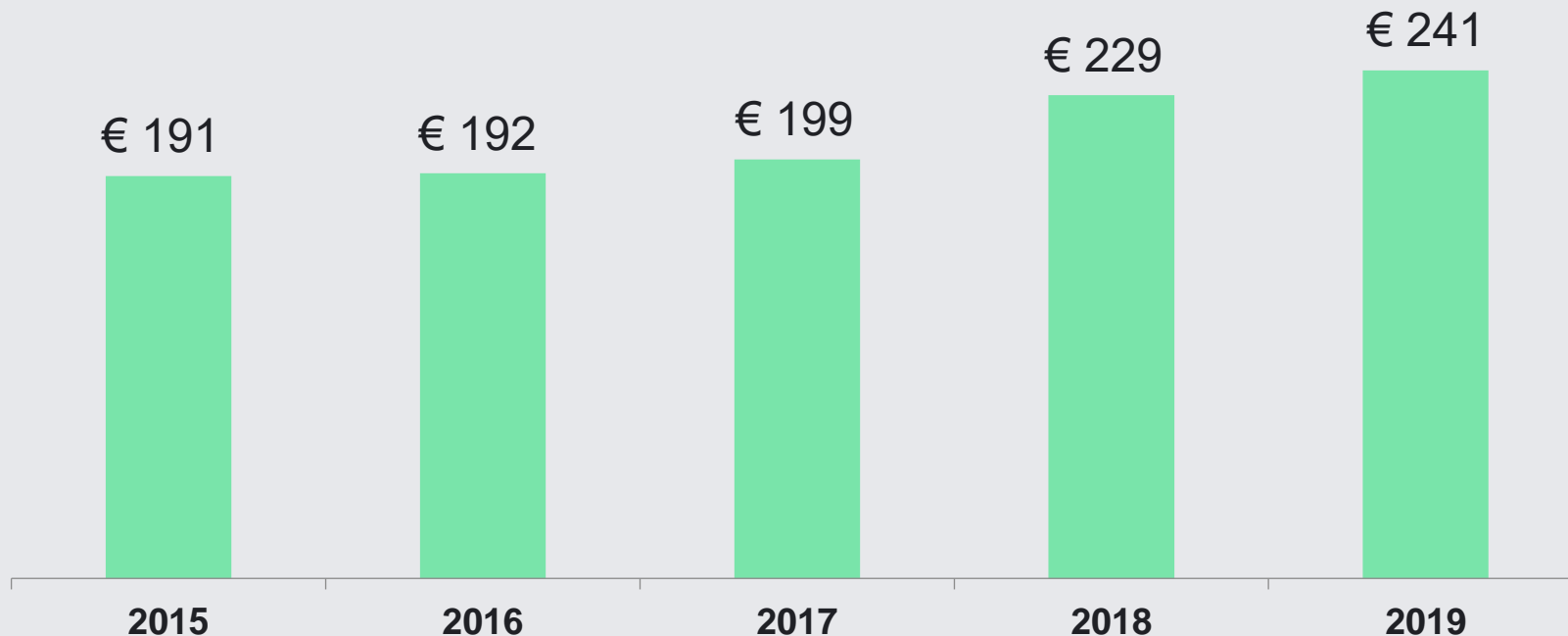
Sample of the top e-commerce advertisers



Online advertisers' TV investment has grown significantly

Spending in TV of online players has increased by 26% between 2015 and 2019

Online brands TV advertising investment in mio €

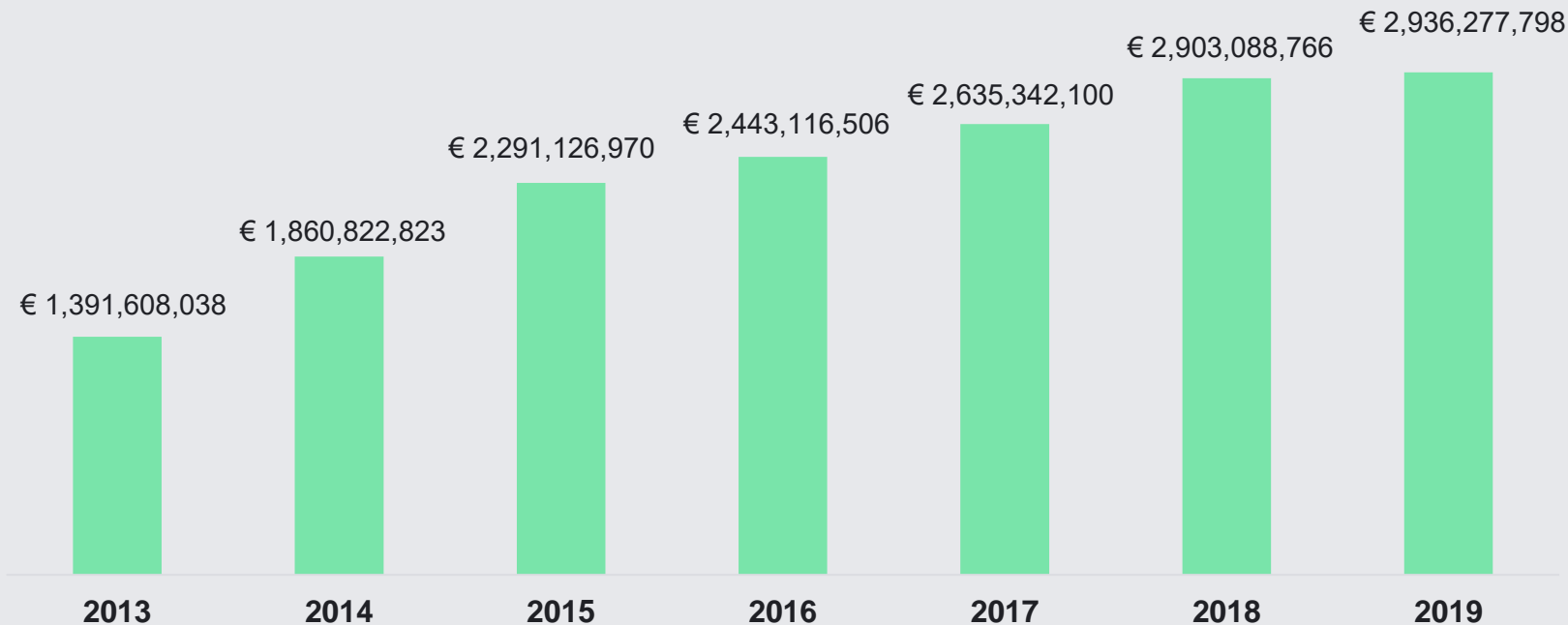


Sample of the top brands 2019



Online services advertisers' TV investment has grown significantly

The total TV adspend of online services + e-commerce advertisers increased from €1.4B in 2013 to € 2.9B in 2019.



Sample of the top online services advertisers

amazon

PARSHIP ELITE
Group

CHECK24

trivago

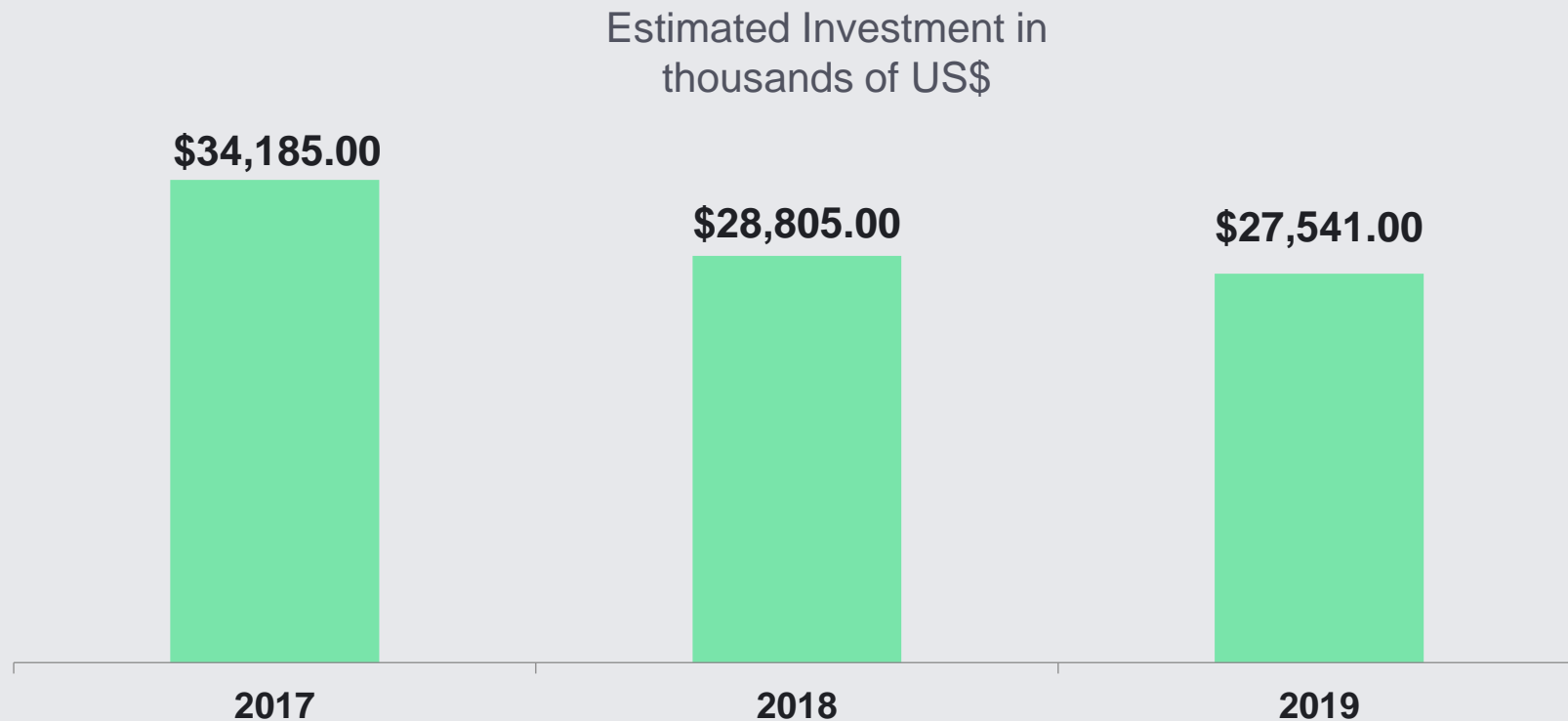
MEGAPIXEL
ENTERTAINMENT
LTD

Lieferando.de

wirkaufendeinauto.de

Online advertisers' TV investment

The total TV adspend of e-commerce players

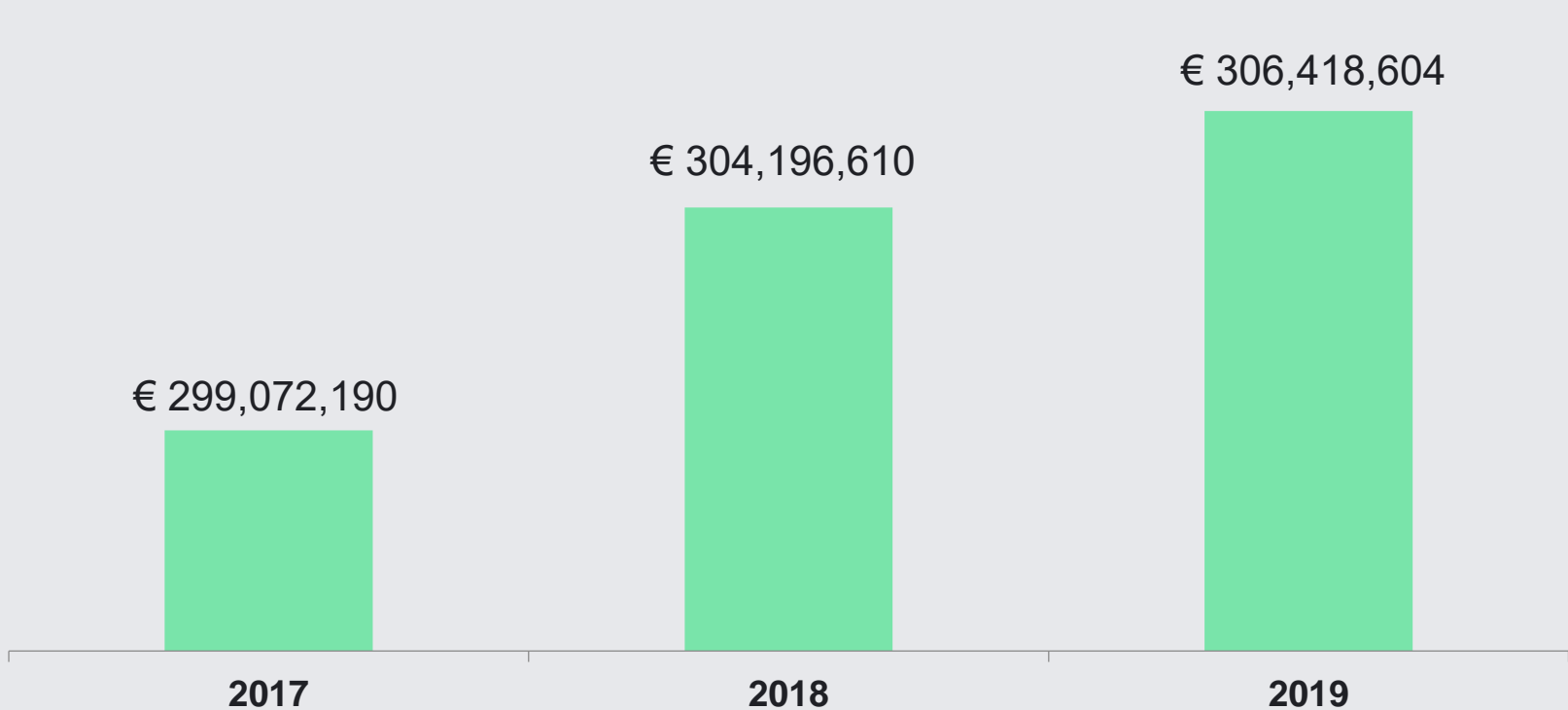


Sample of the top e-commerce advertisers



Online advertisers' TV investment has grown significantly

The total TV adspend of e-commerce players keeps steadily increasing.

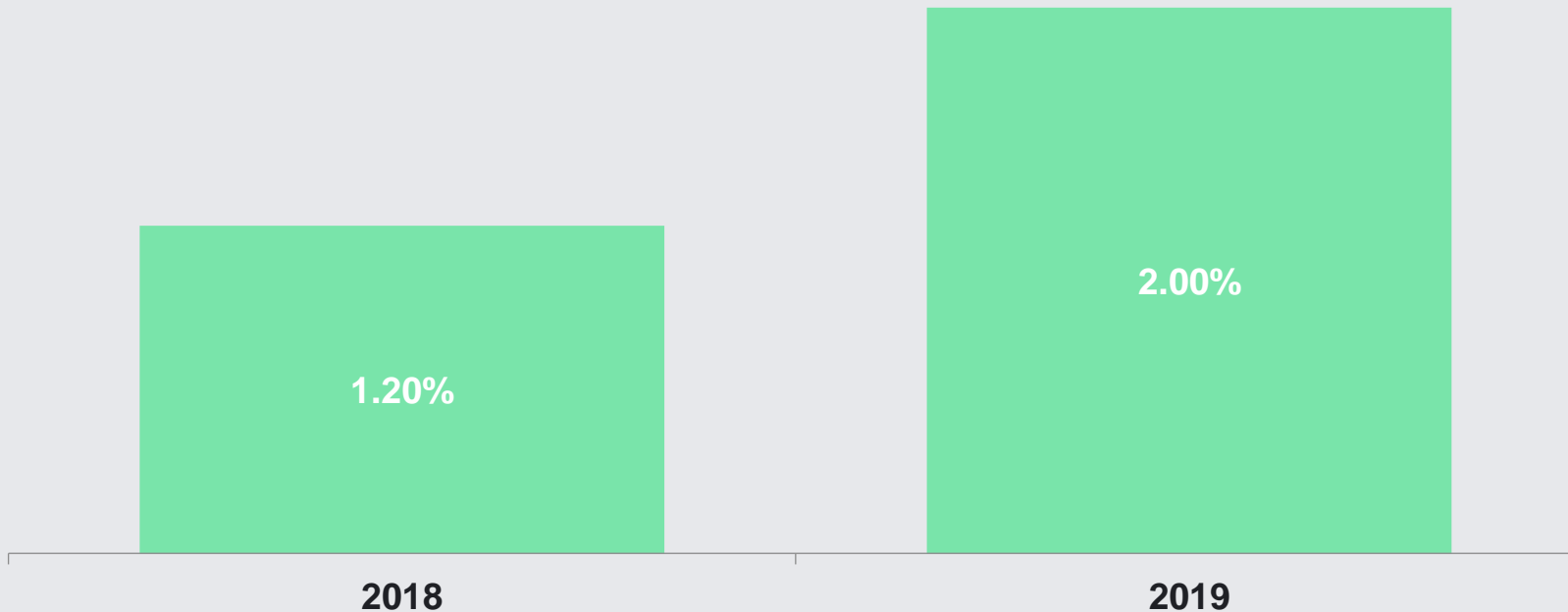


Sample of the top 25 e-commerce advertisers



Online advertisers' TV investment has grown significantly

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



Sample of the top e-commerce advertisers

betsson

despegar

INIO
.COM.PE

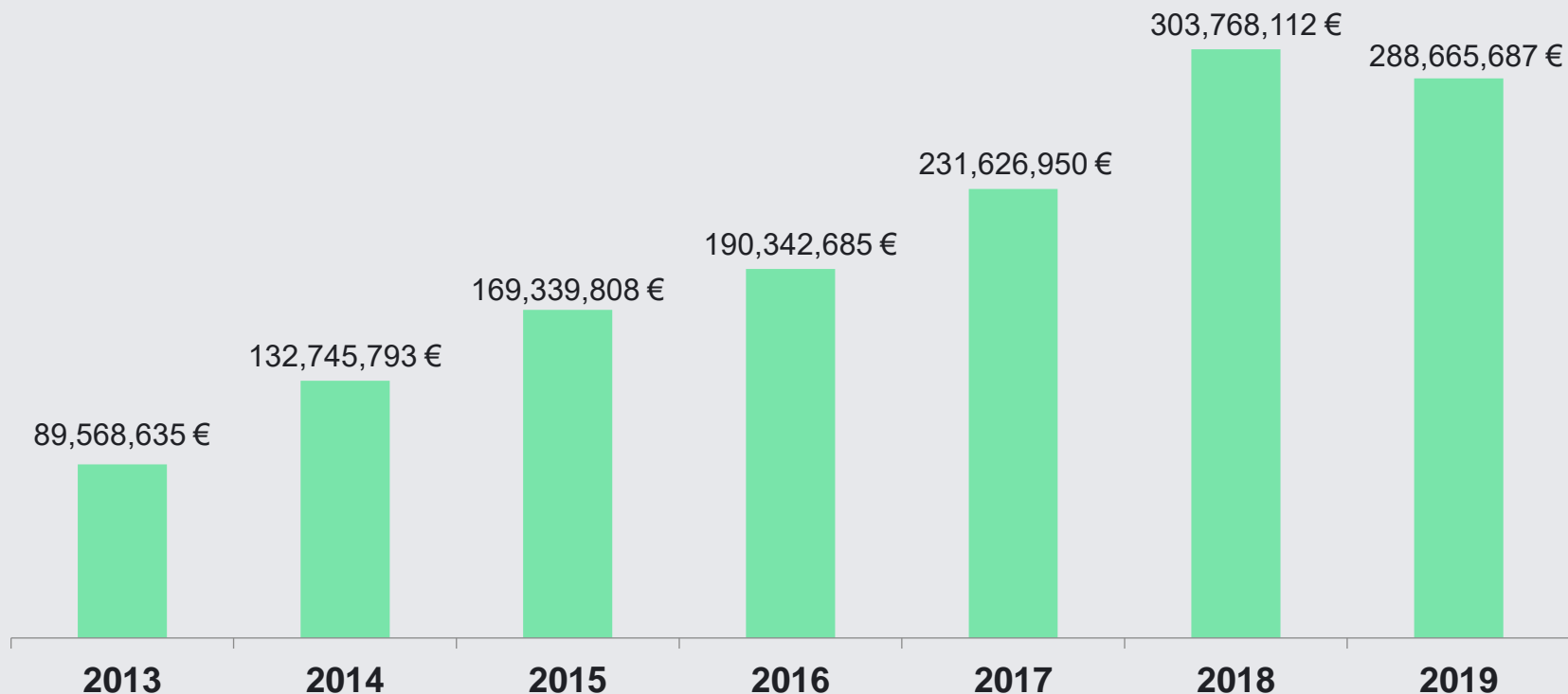
adondevivir

NETFLIX

Online Brands spend billions on TV

Online brands are spending € 119M more on TV annually than four years ago, which represents a 69% increase.

Online Brands' global investment

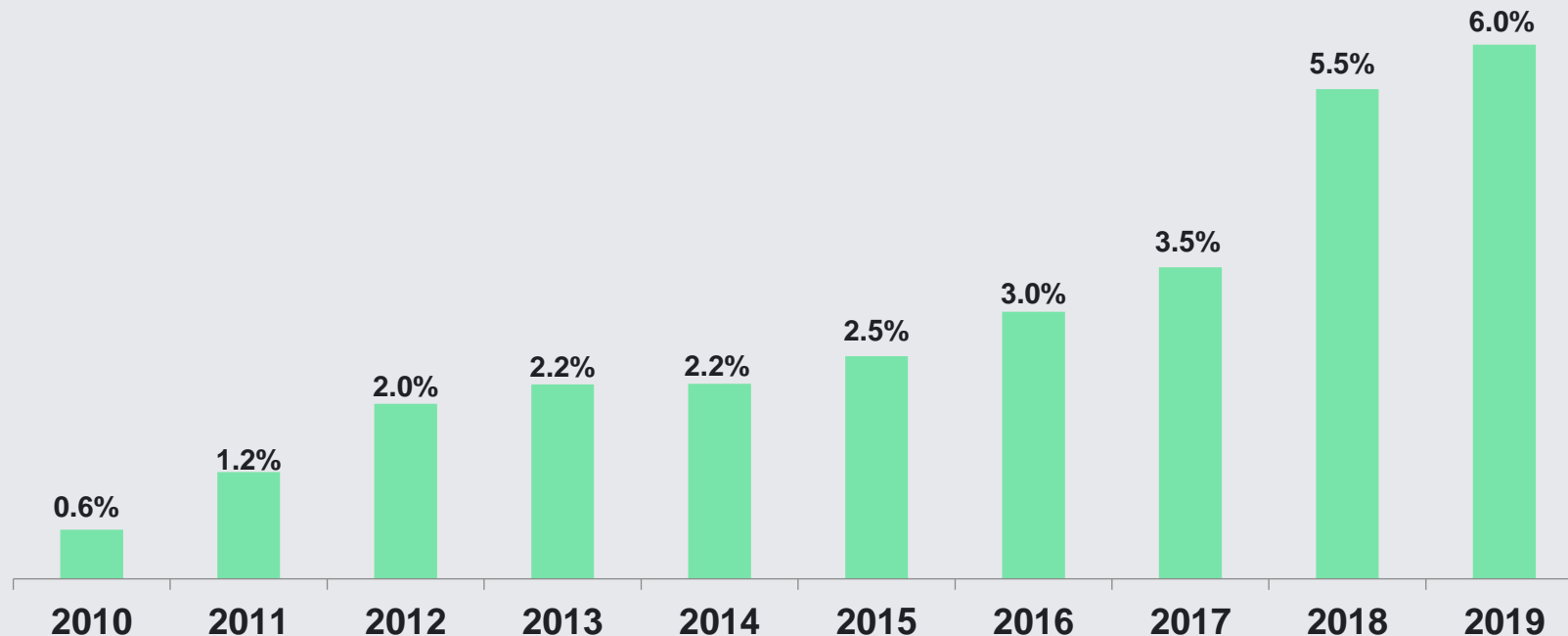


Sample of the top e-commerce advertisers



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.

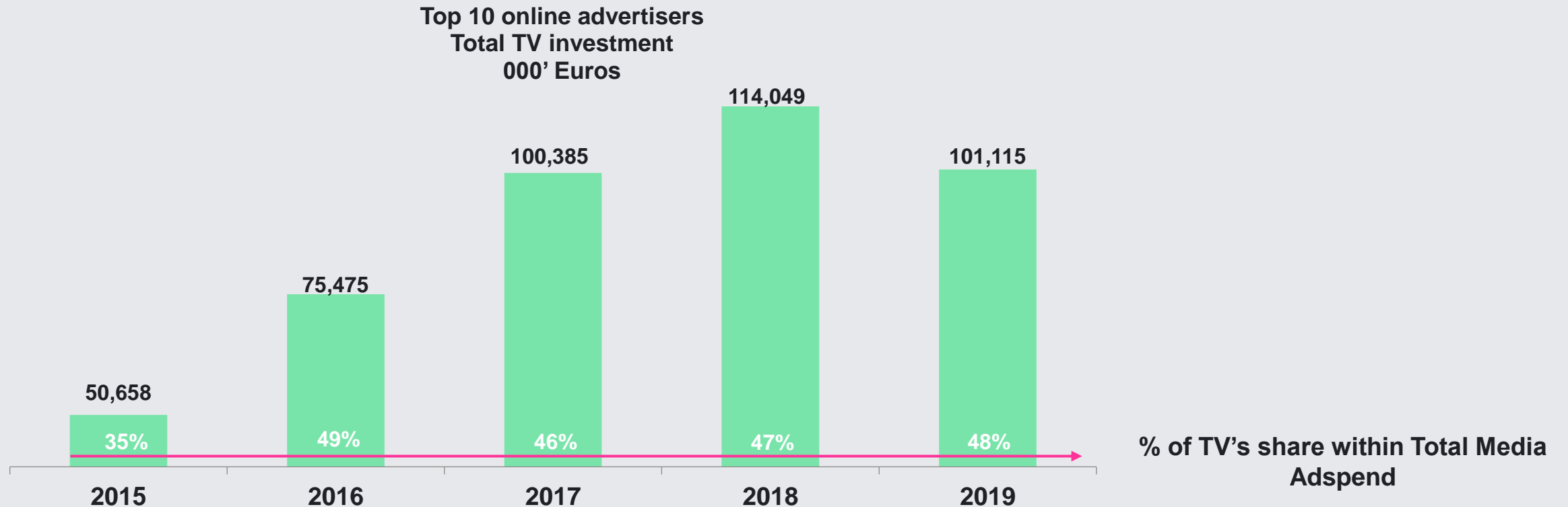


Sample of the top e-commerce advertisers



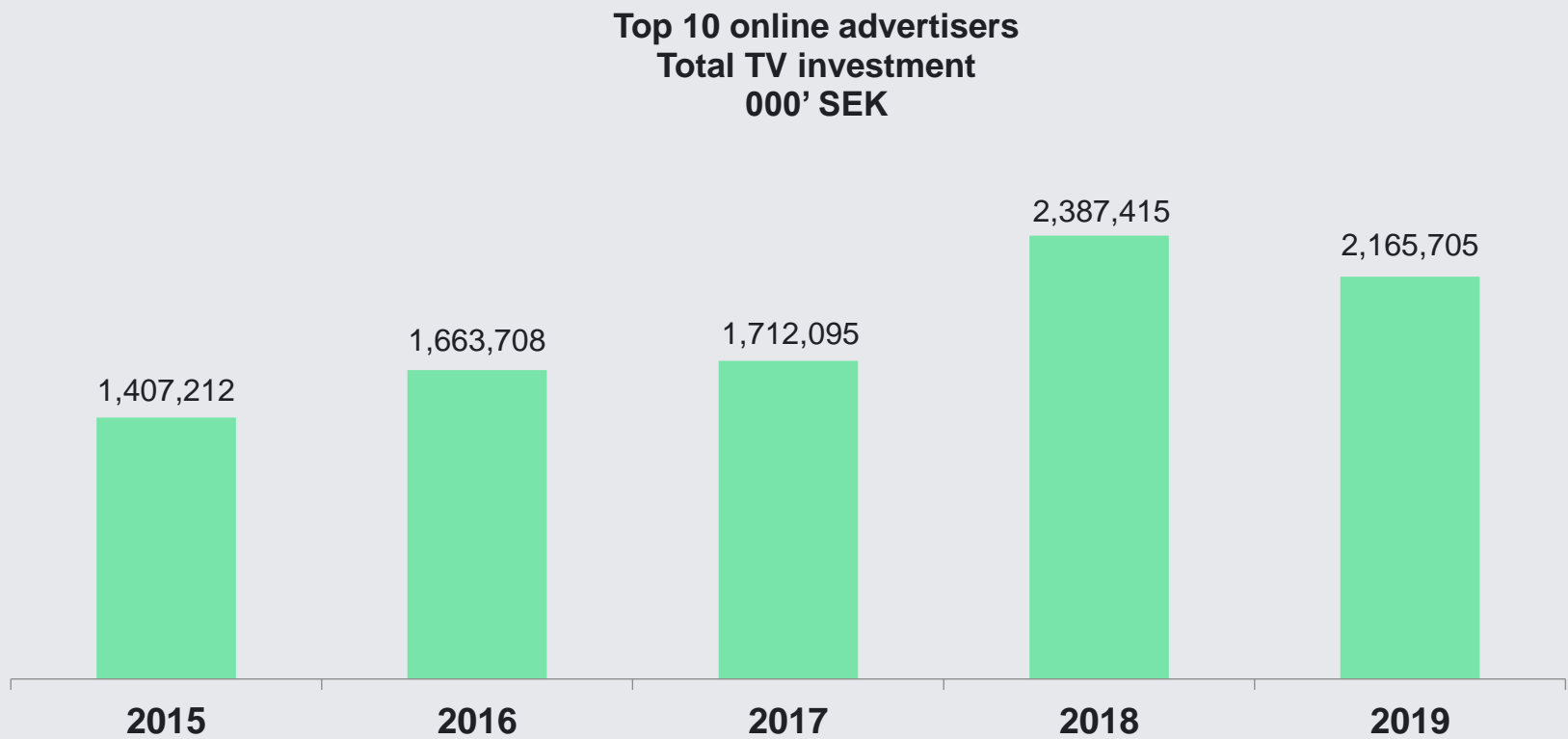
Online advertisers' TV investment has grown significantly

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



Online advertisers' TV investment has grown significantly

The total TV adspend of top 10 online advertisers has been increasing since 2015 with a peak in 2018.

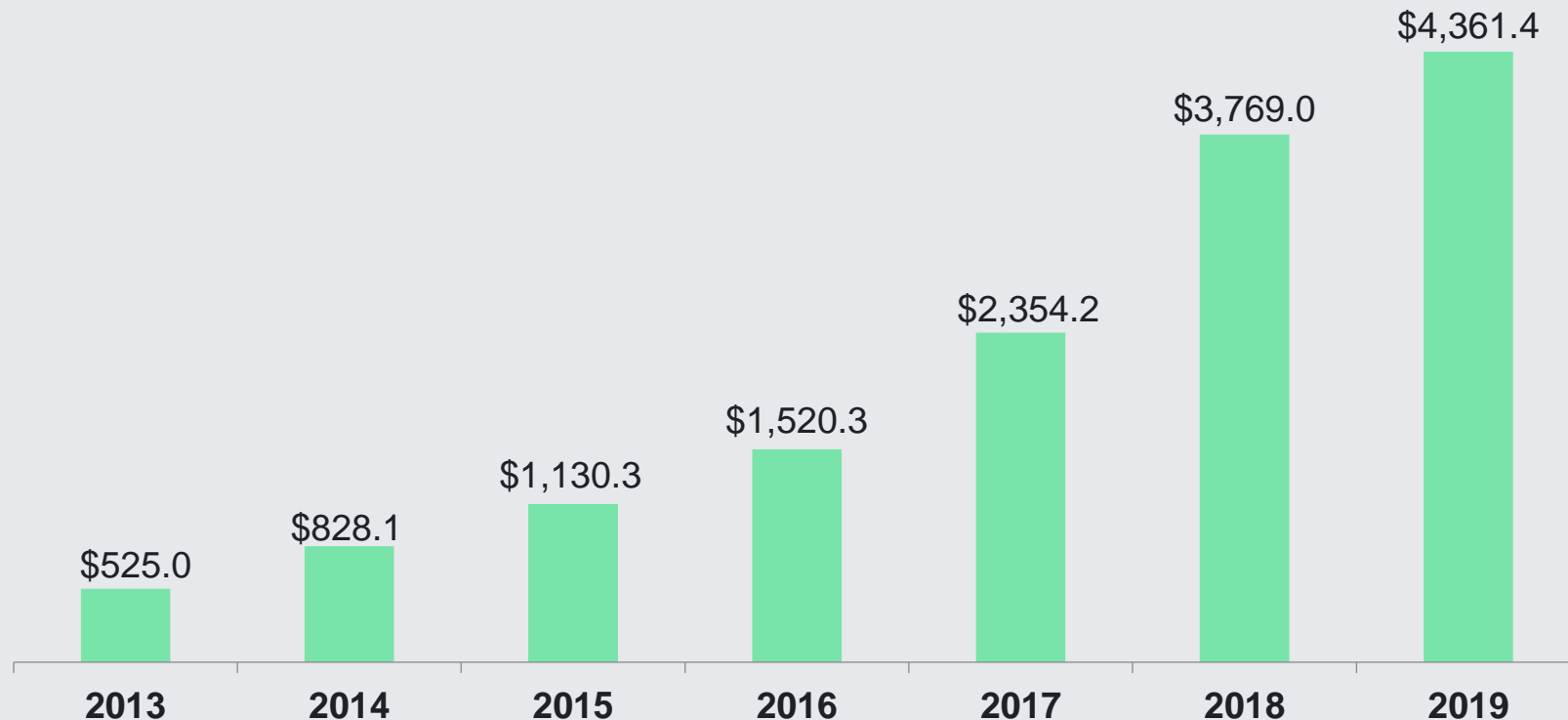


Top 10 online advertisers
in TV 2019:



Emerging direct-to-consumer brands collectively spend billions on TV

“Emerging” direct-to-consumer brands have almost tripled their TV investment over the last three years to \$4+ billion.



Sample of the emerging brands



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)

joyn

britbox
CREATED BY BBC & itv

d-force

Disney+

sky | ADSMART

EBX
EUROPEAN BROADCASTER EXCHANGE
MEDIASET | TF1 | ProSiebenSat.1 Media SE

LOvestv

PLANET V

hulu

cynch
audience buying made easy

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