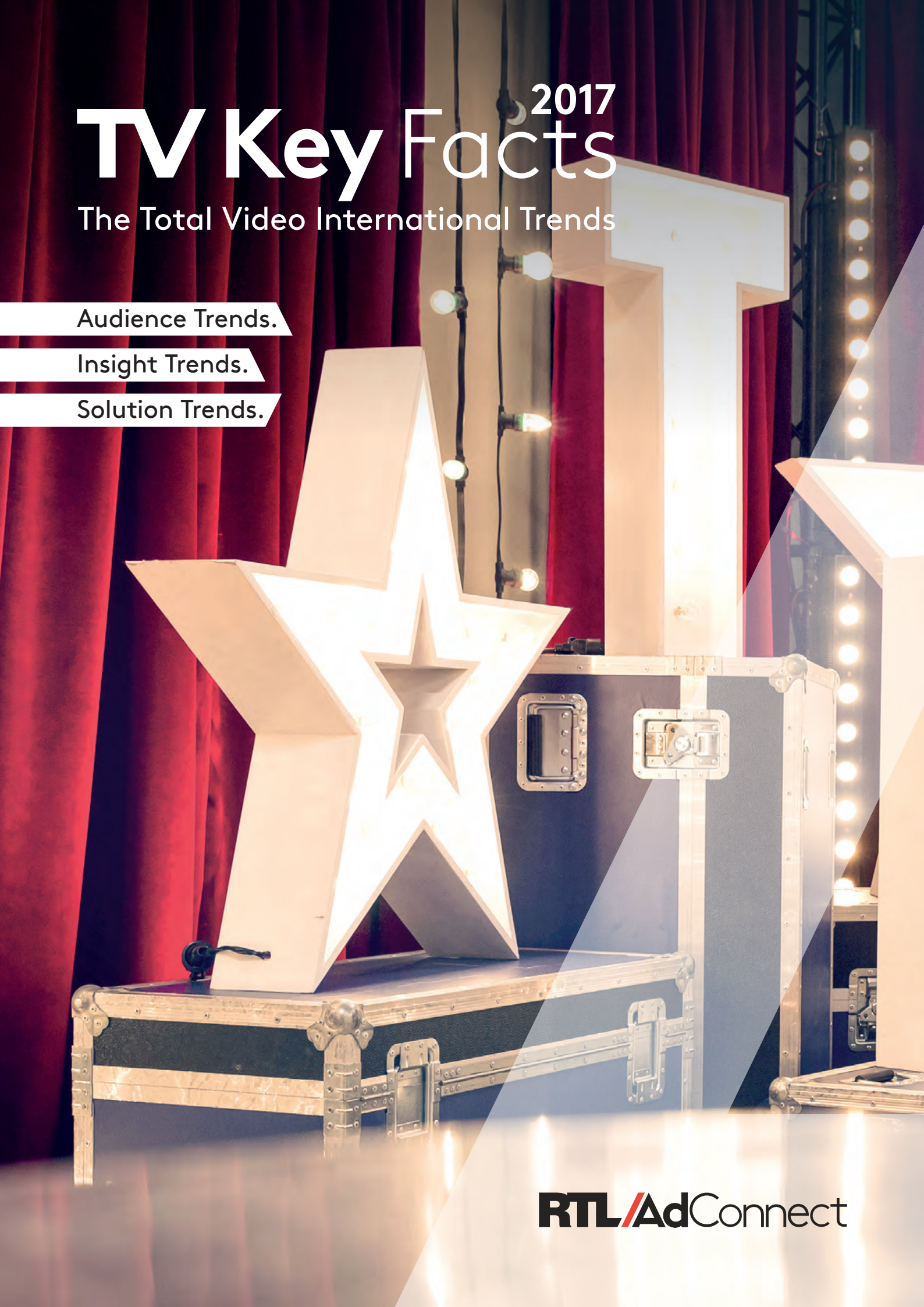
TV Key Facts 2017

The Total Video International Trends

Audience Trends.

Insight Trends.

Solution Trends.



RTL/AdConnect


LA FRANCE A UN INCRO
LEN

Country-by-Country Database

The TV Key Facts 2017 database is available on **www.rtl-adconnect.com/tvkeyfacts**

Once connected with your personal code, you will be able to browse our exclusive country-by-country database which provides a detailed outline of the television landscapes, market by market.

In particular, it details the TV landscapes with domestic and foreign channels, pay TV and digital TV as well as viewing patterns, differentiated audience figures and advertising expenditures, covering:

39
countries

35 European countries

Austria, Belarus, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Macedonia, Netherlands, Norway, Poland, Portugal, Romania, Russia, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey, Ukraine, United Kingdom.

4 overseas countries

India, China, Japan, United States.

Personal access activation

1.

Enter this 6-letter activation code:

2.

Enter your own e-mail address.

3.

Create a personal password which you can easily remember.
You will immediately receive a confirmation by e-mail.
For future connections to the database, you will only need your e-mail address and your personal password, the activation code won't be needed again.

Table of Contents

Facts & Figures.

Audience Trends.

Insight Trends.

Solution Trends.

Advertisers Case Studies.

Key Tables.

The Pioneering Spirit

The TV industry is becoming more complex and increasingly fragmented. With digitisation, consumer behaviour keeps on changing at a staggering rate. That's why maintaining RTL Group's pioneering spirit is more important now than ever before.

For most people, TV today still means the screen in their living room. But the business model of TV, and the wider industry behind it has moved on, and that definition of TV is no longer valid. Thinkbox, the UK's television marketing body, defines TV nowadays as "the high quality, professionally-made, predominantly long-form, audio-visual shows we watch on any screen."
But there is a wider and even easier definition. Here at RTL Group, TV stands for 'Total Video'. We offer free-TV and pay-TV channels; mainstream channels and niche channels; online video in short and long form; traditional ad sales and tech-driven programmatic online advertising. Yet at the same time we have one clear focus: video content.
And with FremantleMedia, we produce high-end dramas and big shows for all major free-TV channels, pay-TV channels and streaming services such as Netflix, Amazon Prime and Hulu. With our growing number of digital studios and multi-platform networks, we also produce and aggregate more and more short-form content for platforms such as YouTube and Facebook. To summarise all this: maximising the consumers' attention to our broad variety of video offers, across all devices – this is what we mean by Total Video.
For example: With more than 238 million views, 2.7 million shares and 230,000 interactions, the audition of 12 year-old Darci Lynne for *America's Got Talent* became the most-watched video on Facebook, reaching over 393 million people.
Within 24 hours, the clip had already got more than 100 million views. This demonstrates the opportunity for content producers and owners to monetise their content on platforms such as Facebook.
In WPP's most recent ranking, 'Top 100 Most Valuable Global Brands', four of those in the top five

Guillaume de Posch and Bert Habets, Co-CEOs of RTL Group, have a clear strategy for the age of 'Total Video'

positions are placing big bets on video: Amazon, Google, Apple and Facebook. To work with, and yet compete with, the internet and tech giants of this world, we need well-coordinated responses across RTL Group. And this also means closer co-operation between our business units. You could even go one step further and say: we have to re-invent ourselves. And this is true for all 'traditional' TV players.

"Follow consumers wherever they are"

Creativity in programming is the essence of success in our business. It is the starting point for everything we do and it's what makes us stand out. Producing, aggregating, distributing and monetising the best content, across all formats and genres – that is our successful business model. As the importance of exclusive local content is growing, so do our opportunities. ➤

RTL AdConnect acts as a kind of 'connecter' within RTL Group, bringing together all of our assets along the 'Total Video' value chain.

Having said that, leadership in creativity means allowing freedom to experiment, and not being afraid of failure. That is the culture we should foster. This also means we have to pull out all the stops to follow consumers wherever they are. The consumer perspective should guide what we do, as has been the case in other industries for decades. Consumers no longer mind where or how they watch our content, so why should we still draw strict lines between linear and non-linear, offline and online? Undoubtedly, consumers are now more willing to pay for their favourite video content in all markets. In recent weeks, both CBS and Disney announced to enhance their direct-to-consumer businesses, because "the media landscape is increasingly defined by direct relationships between content creators and consumers" as Disney CEO Bob Iger described. This is only the beginning of more direct-to-consumer offers and we will be part of this development.

Nevertheless, advertising will remain our biggest revenue stream for many years to come. And we can only carry on successfully selling advertising if we continue to innovate, to reach as many viewers, users and listeners as possible. Figures suggest that growth in the total video industry is mainly coming from non-linear and streaming. This means a more complex value chain, with tech and big data playing a bigger role for all successful business models in the digital media world. Therefore, investments in technology are no longer a nice-to-have in our industry, but a must-have. There is a lot of potential in further expanding and strengthening our data and technology-based competencies. Together with the very experienced management teams of SpotX and Smartclip, we are working on an ambitious growth plan for our ad-tech businesses. This plan includes close collaboration between SpotX and Smartclip, rolling out their solutions across our operations and scaling up the business with further acquisitions and partnerships.

The international 'total video' sales house

At RTL Group, the pioneering spirit has been part of the Group's DNA ever since its creation: from our first steps into radio back in the 1920s, to bringing moving

pictures to the screen in the living room and now – finally – to catering for consumers on all platforms, in all genres. Most of our programme spend is invested in local productions, news, magazines and sports. In total, RTL Group invests €2 billion in Europe's creative industries, every year.

Our advertising sales houses, and also RTL AdConnect, are at the forefront of this development. Following a comprehensive strategic review, IP Network rebranded to RTL AdConnect this summer. It is a gateway for advertisers wishing to communicate outside their home territory and keen to benefit from local expertise. The company's USP encompasses incomparable reach, international insights and advanced strategic advertising solutions.

At the same time, RTL AdConnect acts as a kind of 'connecter' within RTL Group, bringing together all of our assets along the 'Total Video' value chain with one dedicated purpose: to serve the needs of our advertising clients. **X**

At RTL Group, the pioneering spirit has been part of the Group's DNA ever since its creation.

Reach More with Total Video!

The *Total Video Key Facts* brings guidance and expertise into the international advertising world. More than ever, in a complex media ecosystem, data and insight, latest trends and efficient and creative solutions are crucial.

Stéphane Coruble,
Managing Director
RTL AdConnect

What astonishes me the most when I'm travelling in Europe and around the world is that the world is becoming a global village. Just look at the very similar selection of retailers and shops on high streets all around the world. As a result of globalisation, you can find your favourite stores everywhere you go, from Paris to New York, Singapore to Berlin, London to Sydney.
As an international advertising sales house, we need to take this trend into account and respond to global marketing objectives and KPIs more than ever. On the other hand, the world is not yet one giant common marketplace where all consumers live and act the same way.
For example, you might find it easier to roll out a marketing plan in the US, but when it comes to Europe, you'll need to be more granular, to take into account local customs and behaviour, local competition, local legislation, local media habits, and so on. Moreover, it's been proven that localised media plans will guarantee success and efficiency in Europe.

What astonishes me the most when I'm travelling in Europe and around the world is that the world is becoming a global village.

The combination of global objectives with local insight and expertise is at the core of our DNA at RTL AdConnect.
We combine our expertise across the different markets in which we operate, while providing scale, premium content, technology, innovation, access to influencers and efficient advertising solutions to make sure advertisers succeed in reaching their global or multi-local objectives. Our mission is to provide simplified access to a Total Video marketplace across 12 territories and more. Thanks to our strong portfolio of media partners and state-of-the-art ad technology, we can offer advertisers self-served or programmatic buying for our digital ecosystem.

The whole is greater than the sum of its parts

The media industry has changed dramatically in the past decade. The ways to watch content using different screens and players on the market has proliferated in recent years, leading to a very complex and fragmented media world.
To stand out from their competitors, advertisers need a clear and simplified solution: more transparency, efficiency, brand safety and trust.
A local advertiser looking to branch out in the global market needs simplicity. Our role at RTL AdConnect is to give a clear breakdown of how our group's local knowledge and expertise can make an impact in this complex media market, as we strongly believe that "the whole is greater than the sum of its parts".
Our pledge at RTL AdConnect for added value is based on three pillars: Audience, to represent the power of our unique scale in Europe; Insight, to illustrate our recognized expertise, studies and data collected in each country, and Solution, to show how we engage our audiences with premium content in a secured environment.
RTL AdConnect represents all of RTL Group's media partners and beyond (ITV, Rai, Medialaan). In an environment where efficiency is a key factor, the decision-making process is shifting: sales are going from local to global or vice versa, resulting in a "glocal" approach.

The *Total Video Key Facts* serves as a tool, a guiding light in this complex and sophisticated advertising world.

Thanks to our portfolio of more than 100 TV channels, 30 radio stations and 300 digital platforms, we reach 160 million consumers every day and accumulate more than 26 billion video views each month.
Our Adtech partners help us to give advertisers simplified access to premium content and facilitate the development of pan-European campaigns. This is also the mission for this edition of *Total Video Key Facts*.

Audience Trends

The Audience Trends section highlights the challenges faced by today's media players who are adapting to the viewer's interests and demands. Content is essential on linear TV, where producers and broadcasters invest in more qualitative and creative programmes. The same goes for multi-platform networks where influencers rule advertising. New consumption habits make it more and more challenging to reach Millenials, which is why content creators are becoming an asset in developing innovative solutions.

Insight Trends

The Insight Trends section covers new behaviours in viewing habits, audience measurement, ad investments, screen technology (HD, VOD, and smart TV) and ad technology. The database linked to the magazine gathers information on 39 European countries as well as United States, China, Japan and India.

Solution Trends

In the Solution Trends section, you'll get an inside look at the most recent strategies and products developed by our industry to respond to advertiser's needs. It explores the latest visions in targeting with data collection, return on investments, effectiveness, simplification using programmatic buying and brand safety.
In collaboration with RTL Group and all our partners, the *Total Video Key Facts* serves as a tool, a guiding light in this multifaceted advertising world.

2016 Facts & Figures.

3h54*

2016 average viewing time in Europe,
-1 minute vs 2015

Highest viewing time: Romania **5h29** Serbia **5h17** Hungary **4h42**

Biggest increases vs 2015: Slovenia **+9 minutes** (3h35)
Austria **+7 minutes** (2h48) Belarus **+7 minutes** (3h53)

260 M VIEWERS

watch TV during
prime time in Europe

Latest prime time in Greece and Spain (22:30), earliest in Austria, Czech Republic, Denmark, Hungary, Russia and Slovakia (20:45).

Biggest audiences 2016 around the world

158 M

viewers for the
Spring Festival
on CCTV 1+3
in China

113 M

viewers for the
Super Bowl
on NBC
in the USA

30M

viewers for the
Euro 2016 semifinal
Germany/France
on ZDF in Germany

Biggest share of time-shifted TV viewing

UK **13.8%** Switzerland G. **13.4%** Switzerland F. **13.3%**

**RTL AdConnect's own calculations.*
Source: IHS Markit, EURODATA TV, local institutes – reproduction forbidden, all rights reserved by MÉDIAMÉTRIE

Most watched movies

Number of times in the Top 10 cinema movies in 24 markets

Frozen

7x

Home Alone

4x

Qu'est-ce qu'on a fait au Bon Dieu ?

4x

Most popular entertainment shows

Number of times in the Top 20 Programmes

YOUR FACE SOUNDS FAMILIAR **9x**

The Voice **7x**

GOT TALENT **7x**

Most popular series

Tatort

4x

3x *Camping Paradis, Castle, Coronation Street, Criminal Minds, Der Bergdoktor, Clem*

80% of the top series in 24 markets were local productions

TV programme genres split in Europe

Sports **58.8%**

Entertainment **18.1%**

Fiction **13.3%**

Factual **9.8%**

2016 Facts & Figures.

81.4%

of European TV households own a HDTV

87.7%

of European TV households receive a digital TV signal (even more than 90% in the EU)

35.1%

Most of the digital TV households in Europe receive their signal by satellite

Top 3 European audiences 2016

Football European Championship Germany/France Semifinal

ZDF (Germany)

Rating **39.8%**
Share **80.3%**

Football European Championship France/Portugal Final

M6 (France)

Rating **36.0%**
Share **71.8%**

Football European Championship Germany/Italy

Rai 1 (Italy)

Rating **28.3%**
Share **66.%**

Source: IHS Markit, EURODATA TV, local institutes – reproduction forbidden, all rights reserved by MÉDIAMÉTRIE

169M+

TV spots were broadcast in Europe in 2016 vs 99M in 2010

22.2 sec

2016 average spot length in Europe

Biggest panels

(in households)

- Italy **5 666**
- UK **5 100**
- France **5 006**

Highest TV share in the media mix

TV share of media expenditure

increased in

17

of the European TV markets

Biggest TV ad spenders in 32 markets

P&G

Unilever

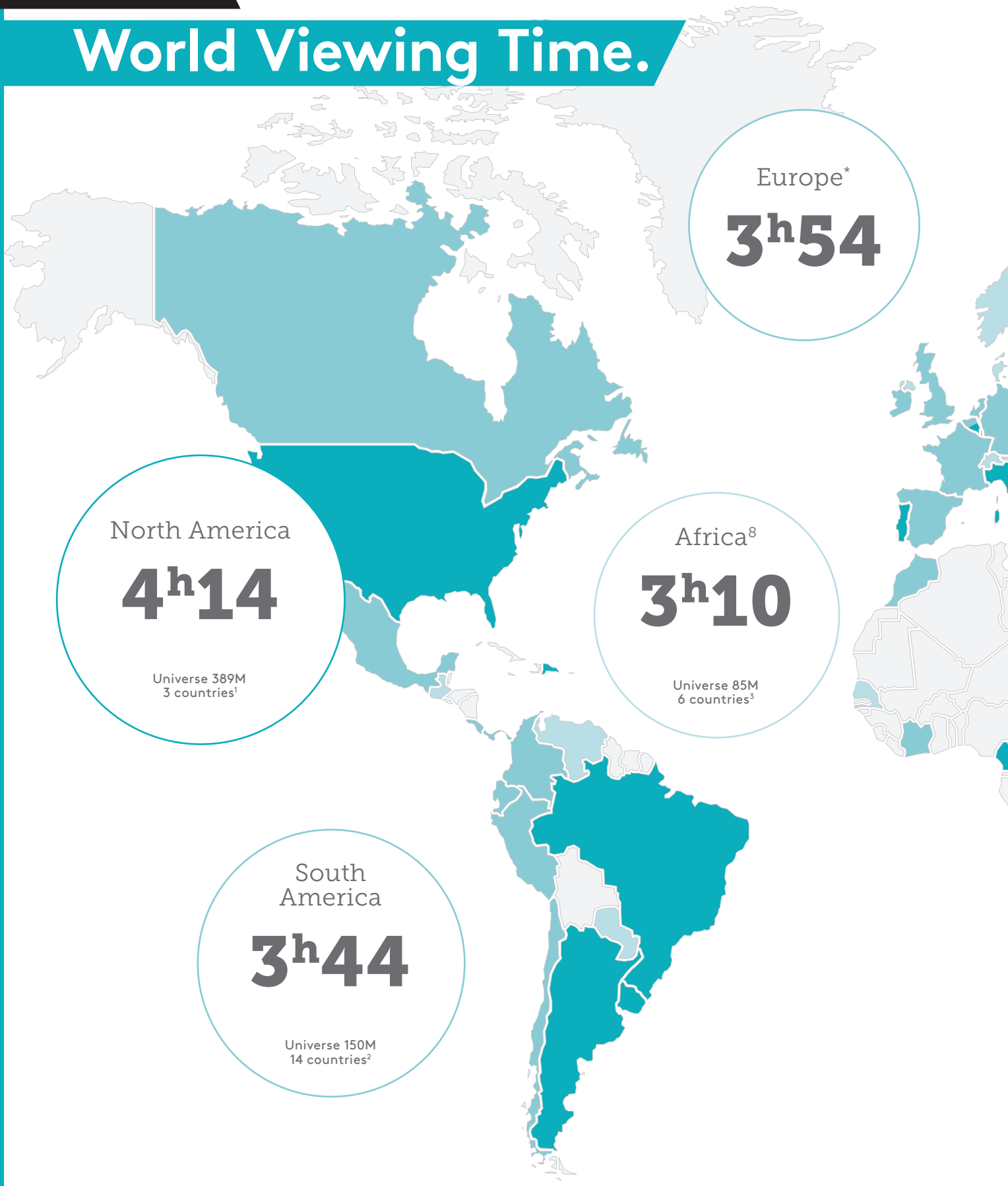
Reckitt Benckiser

Most advertised sectors on TV in 32 markets

Source: IHS Markit, EURODATA TV, local institutes – reproduction forbidden, all rights reserved by MÉDIAMÉTRIE

2016

World Viewing Time.



*[1]Canada, USA, Mexico; [2]Argentinia, Brazil, Chile, Colombia, Costa Rica, Dominican Republic, Ecuador, Guatemala, Panama, Paraguay, Peru, Puerto Rico, Uruguay, Venezuela; [3]Cameroon, Ivory Coast, Senegal, Madagascar, Morocco, South Africa; [4]Australia (Regional), New Zealand; [5]Armenia, Bahrain, Egypt, Iraq, Israel, Jordan, Kazakhstan, Kuwait, Lebanon, Oman, Qatar, Saudi Arabia, Syria, Turkey, United Arab Emirates; [6]Bangladesh, China, India, Indonesia, Japan (Kansai, Kanto, Nagoya), Malaysia, Mongolia, Pakistan, Philippines, Singapore, South Korea, Sri Lanka, Taiwan, Thailand, Vietnam; [7]Including Hong Kong and Myanmar; [8]Only South Africa and Morocco are measured on a people-meter basis; [9]Only Armenia, Azerbaijan, Israel, Lebanon and Turkey are measured on a people-meter basis. *RTL AdConnect's own calculations.*
Source: EURODATA TV – One Television in the World 2017 issue – reproduction forbidden, all rights reserved by MÉDIAMÉTRIE

World

3h00

Universe 3.9Bn
92 countries

Daily viewing time

- more than 4 hours
- 3 to 4 hours
- 2 to 3 hours
- less than 2 hours
- n.a.

Oceania

2h58

Universe 12M
2 countries[4]

Asia[7]

2h29

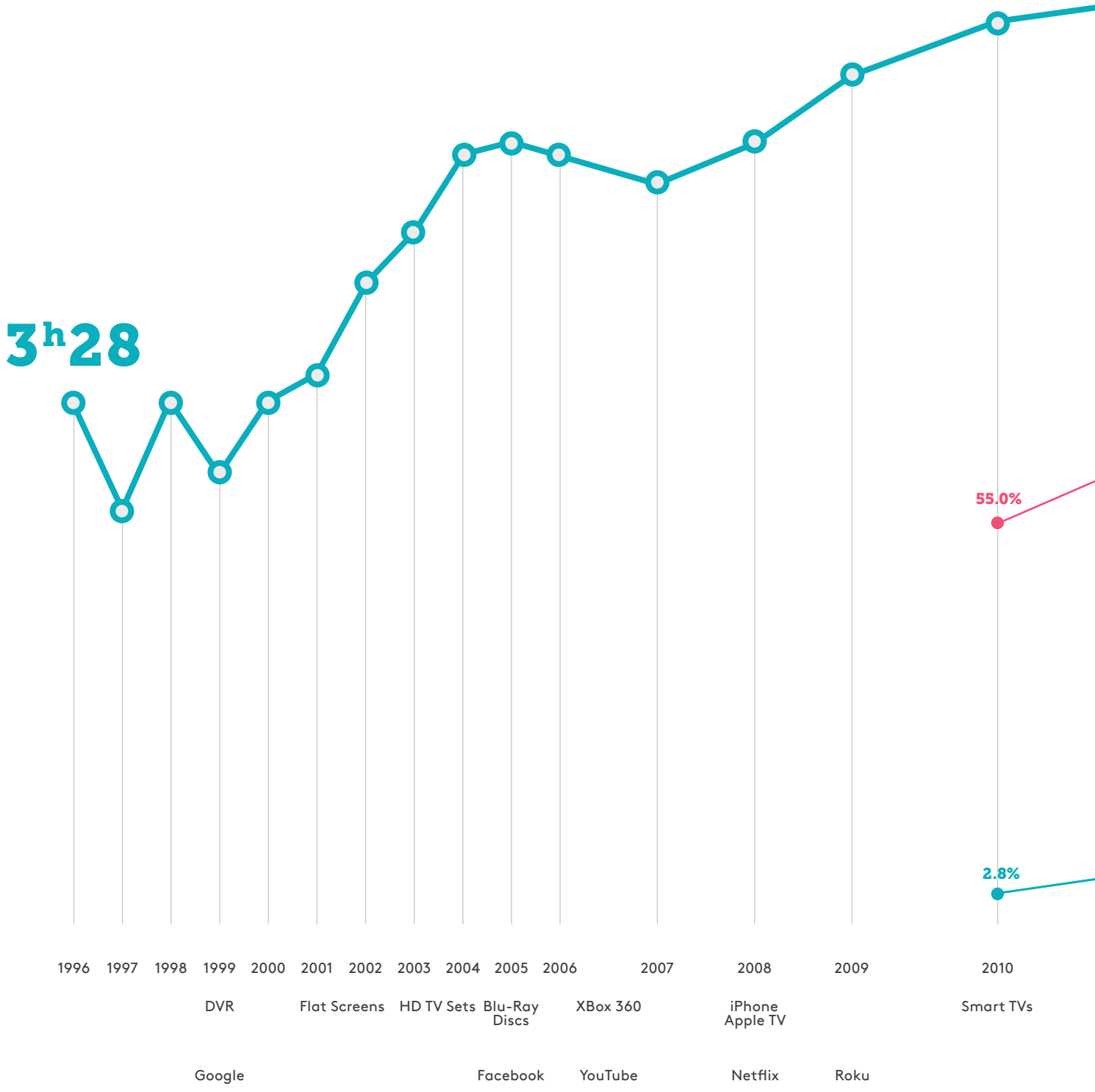
Universe 2.5Bn
15 countries[6]

Middle East[9]

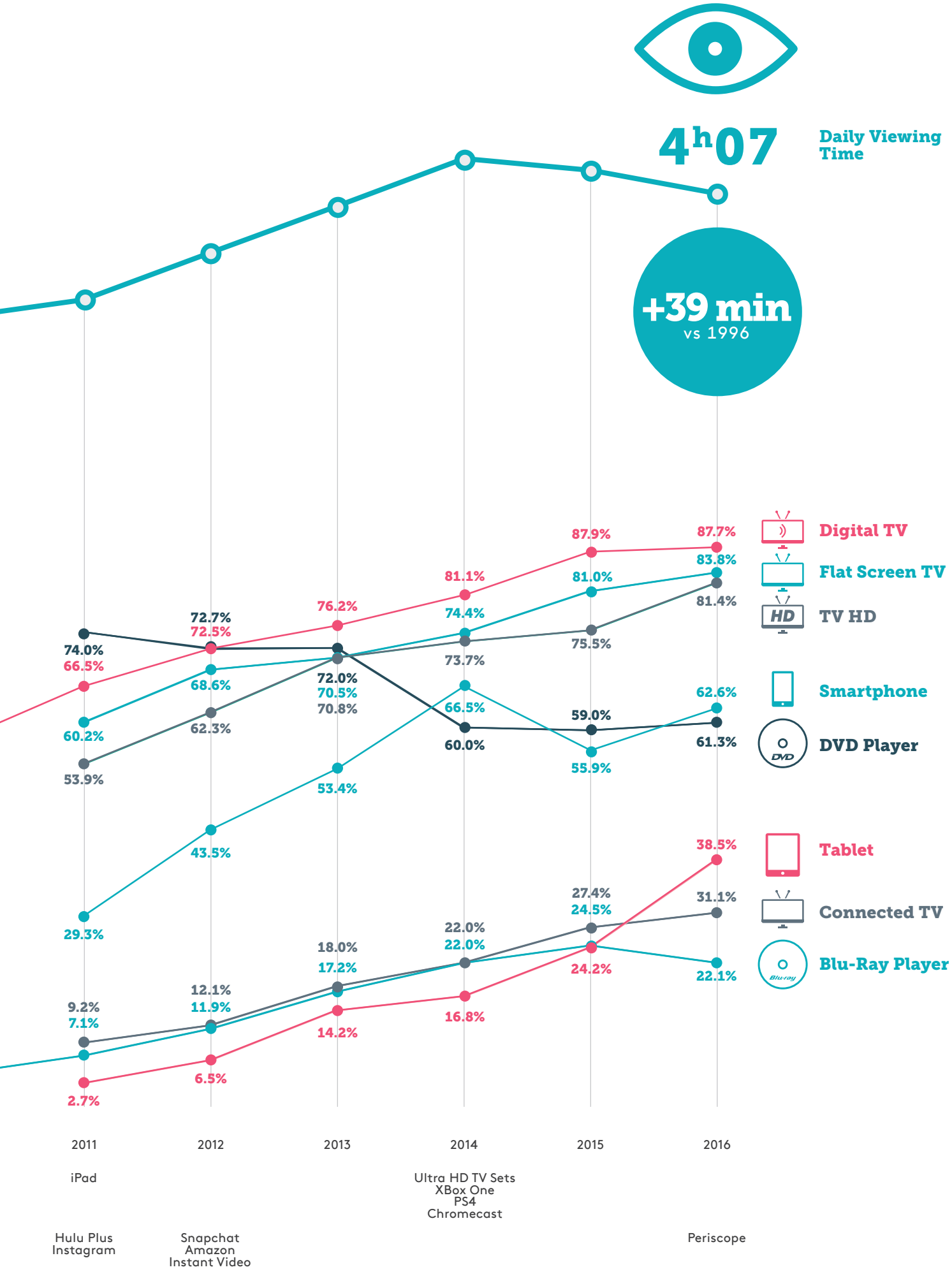
3h50

Universe 160M
14 countries[5]

European TV Viewing Time & Technological Developments.



Source: IHS Markit, local institues, viewing time for adults


4h07
Daily Viewing Time
+39 min
vs 1996
Digital TV
Flat Screen TV
TV HD
Smartphone
DVD Player
Tablet
Connected TV
Blu-Ray Player
87.9%
87.7%
83.8%
81.1%
81.0%
81.4%
76.2%
74.4%
75.5%
73.7%
72.7%
72.5%
74.0%
66.5%
68.6%
72.0%
70.5%
70.8%
66.5%
62.6%
59.0%
60.0%
61.3%
60.2%
62.3%
53.9%
55.9%
53.4%
43.5%
38.5%
27.4%
24.5%
31.1%
29.3%
22.0%
22.0%
18.0%
17.2%
24.2%
22.1%
12.1%
11.9%
9.2%
7.1%
16.8%
14.2%
6.5%
2.7%
2011
2012
2013
2014
2015
2016
iPad
Ultra HD TV Sets
XBox One
PS4
Chromecast
Hulu Plus
Instagram
Snapchat
Amazon
Instant Video
Periscope

Audience Trends.

Today, content is watched in multiple forms: linear, non-linear, big screens, small screens – the list goes on. The fact is, regardless of the size or format, screens are still inspiring worldwide audiences. And it's all about the content!

Carine Jean-Jean
Communications Director
RTL/AdConnect

The worldwide viewing time for linear TV is far ahead of other screens, and is still ranked the second best leisure activity after sleeping. With a daily worldwide viewing time of 3 hours, TV stands its ground as the most consumed media.
As Duncan Stewart from Deloitte explains, social media is dramatically increasing among the young target groups: "As of December 2016, over 60 % of US 18- to 34-year olds were on Snapchat, over 75% were on Instagram, and 95 % were on Facebook." Yet, their social media consumption is far behind linear TV consumption: "Daily use of each platform averaged 14 minutes, 13 minutes and over 30 minutes, respectively ... meaning between the three, total daily social media approaches one hour."
Often said to be a dying medium, TV continues to thrive as a media leader, despite an important part of TV consumption measurement still being lost in the mix: content viewed on online screens.
The ongoing success behind linear and non-linear formats, and influencers on YouTube, lies in their talent for storytelling, evoking emotions, entertaining, and informing the audience. No media other than total video is as effective in bringing out powerful emotions.
The sports, fiction, and factual genres are the most watched in the world, and live programmes are still on top of the programme rankings.
Local fictions are also tremendously successful. Nico Hofmann, head of the production company UFA, explained that the key to fiction success is "to be authentic, unique and new".
Even if TV narratives are historical, involving the audience in the casting, storytelling and directing is a key strategy to reach younger target groups.
The search for more authenticity is reinforced by Médiamétrie's programme trends survey. The key take away words are: "understanding another's reality, the importance of family bonds, and playing with space and time". Of course, some kinks still need to be sorted out concerning the measurement and monetisation of TV. But one thing is certain: Total Video is king! X

La France a un Incroyable Talent

M6, France

13 Reasons Why
Netflix

International Trends 2016-17

During the 2016-17 season, more than 7,500 new programmes were launched in the 50 countries covered by NoTa. Factual and fictional genres remain the key groups when it comes to new launches.

Candice Alessandra
Media Consultant
Eurodata TV
WORLDWIDE

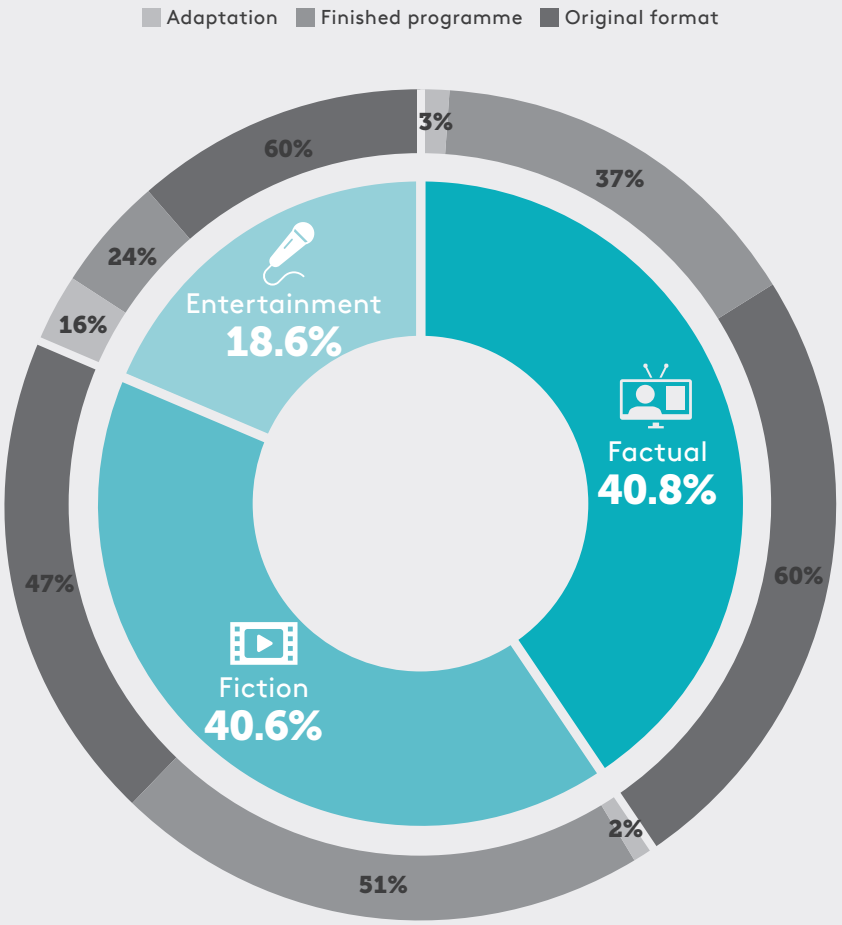
Most of these new launches are original creations, but there are features in each genre which are worth mentioning. Indeed, scripted content is mostly imported, whereas unscripted programmes are mainly original creations. The amount of adaptation in entertainment is quite significant between fictional and factual narratives.

Last season, people and characters questioned themselves in several ways, and the trend followed into this season too. However, this season delves into the multiple sides of reality. Both in TV programmes and online creations, broadcasters and producers seek to evoke the world we live in.

Some decide to portray our present reality in a frank and open way so that viewers are confronted with it, while others prefer to escape reality to better relate to it. As authenticity was one of the key words at the last MIPTV, playing with space and time was also highlighted, especially with virtual reality. In the end, the aim is the same: people and characters try to build bonds to face their lives and the tough world we experience. It brings families from all walks of life together. ➤

Both in TV programmes and online creations, broadcasters and producers seek to evoke the world we live in.

7,500 new programmes launched in 2016-17



Source: Eurodata TV Worldwide / NoTa / – All rights reserved.

/ Authenticity in new programmes is not only about fear and news headlines. It's also at the core of shows in which people are trying to understand each other.

Facing authenticity

Teaming reality with authenticity often promotes sensitive topics. This season saw an increasing number of factual docu-series as well as fictional trends involving military and terrorism.

Viewers want to make sense of the current conflicts and the "who's who" on all sides. In the Flemish documentary, *Is In Het Vizier* launched on Canvas, journalist Rudi Vranckx braves the ISIS front lines and questions soldiers as well as ex-jihadists, cyber analysts and civilians. *War Watchers*, the American documentary project, is digging even deeper by confronting war tourism. On the fictional side, Turkey develops numerous series about terrorism such as *The Oath*, where a special unit is created to stop terror attacks in the country. Distributed by Global Agency,

Facing authenticity

The Oath

Star, Turkey

Distributor: Global Agency

April 2017

5+, 6 episodes

+60%*

Rich House, Poor House

Channel 5, UK

Distributor: Hat Trick Productions

March 2017

16-34, 4 episodes

x2.5*

The Bridge

Movistar, Spain

Distributor: Endemol Shine Group

May 2017

**Rating evolution vs regular time slot. Source: Eurodata TV Worldwide / NoTa / Relevant partners – All rights reserved.*

the 13-episode series performed very well with young adults. Other territories delve into this trend even if they are far from the front such as the Danish series *Below the Surface,* which tells the story of 15 hostages in captivity underground.

Authenticity in new programmes is not only about fear and news headlines. It's also at the core of shows in which people are trying to understand each other. The Netflix hit fiction series, *13 Reasons Why,* about an American high school girl who commits suicide, has created a buzz in the media and on social networks. On the unscripted side, and with a lighter tone, the British reality show *Rich House, Poor House,* follows families from different social classes after they swap lives. The 4-part series was especially a hit with young adults, multiplying the channel slot average by 2.5. Understanding and group trust is the idea behind the Spanish reality show, *The Bridge*.

Distributed by Endemol Shine Group, the reality show sees participants working together to achieve one common goal, building a bridge to find a treasure. But there's a twist: there's no elimination, no real competition. Participants decide who wins the treasure, and the winner decides if he/she wants to share it or not, with some people or everyone.

Playing with space and time

Portraying the present reality is a complex feat. Several producers and broadcasters prefer to do it from another angle, basing their programmes on the past or in a not too distant future. ➤

The Orville
Fox, USA

Particularly this season, plots and concepts played with space and time. Several elements are muddled to confuse people and characters, in genres across the board!

In the Norwegian game show, *Lost in Time*, broadcast on TV Norge, contestants are transported into different eras, thanks to interactive mixed reality (IMR) technology, to face challenges and win a cash prize. Despite some technical issues during the first two episodes, the results among young adults were in line with the channel's slot average.

In September 2016, Talpa launched the pilot *The Story of My Life*. Broadcast on the Dutch channel RTL4, the talk show sees a couple of celebrities purposely made to look aged with makeup. After a convincing broadcast, the format has been bought to be adapted in countries such as Germany, Finland, Brazil and Russia. Following the trend, the British dating show *Game of Clones* involved a bachelor having the choice between several admirers who are dressed and made up to look the same. The format has been adapted for the French young adults channel NRJ12.

Fiction-wise, several series are also playing with time and space concepts. The French mini-series, *Beyond the Walls*, from Arte, immerses viewers in the journey of a young woman in a labyrinthine, parallel world hidden in an abandoned house she inherits from a complete stranger. Another season hit from the American Cable channel HBO, *Westworld* has to be mentioned in this category. Set in a high-tech Wild West park populated by android hosts, every day restarts all over again, at least at the beginning.

Playing with space and time

Game of Clones

E4, UK

Distributor:

The Story Lab

February 2017

Westworld

HBO, USA

Distributor: HBO

October 2016

18-34, 10 episodes

x5.4%*

Transfer

Arte, France

Distributor: Lagardère Studios Distribution

Coming up

**Rating evolution vs regular time slot. Source: Eurodata TV Worldwide / NoTa / Relevant partners – All rights reserved.*

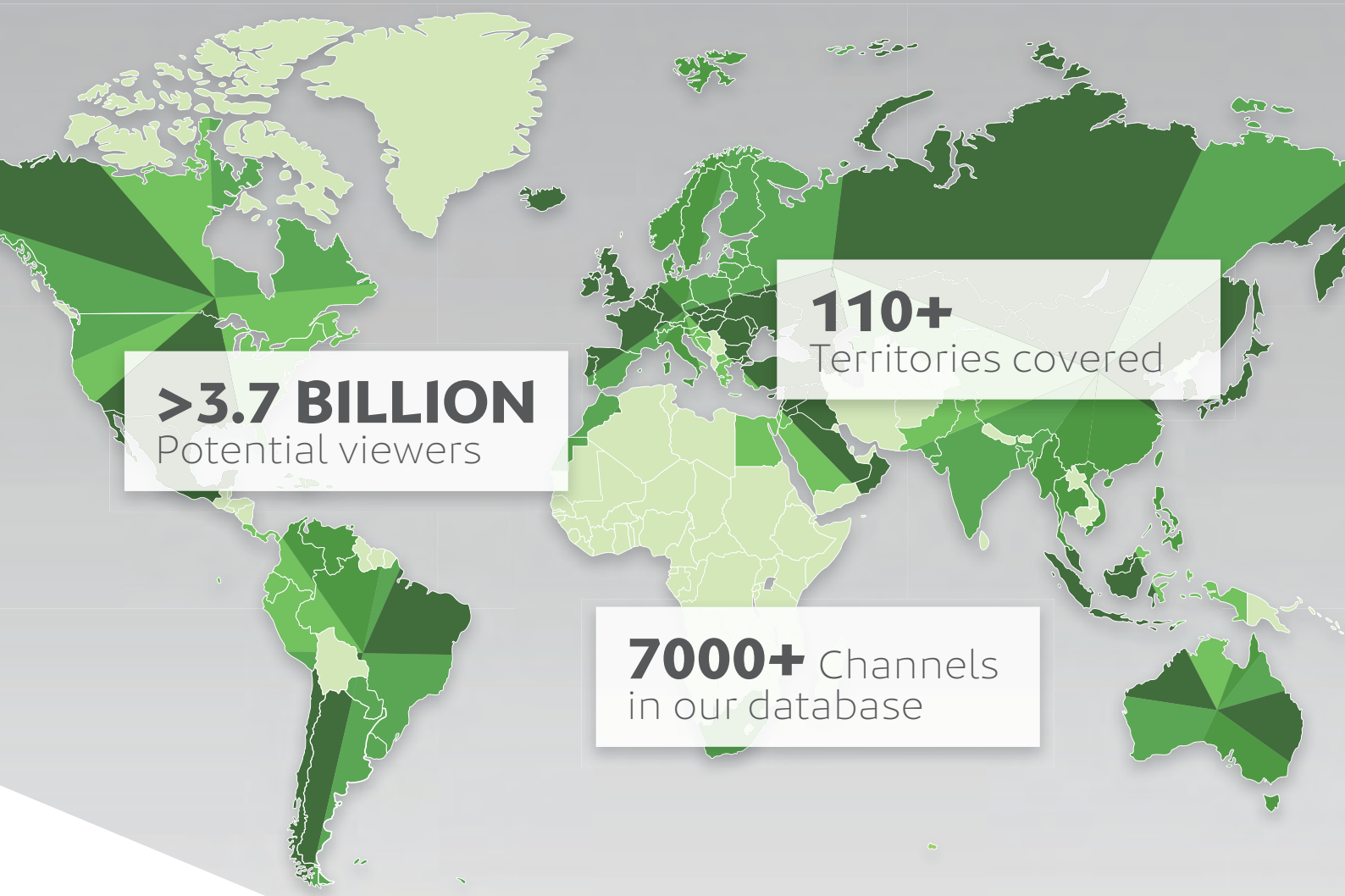
In the same vein, the upcoming French mini-series, *Transfer*, imagines the future of science, in which it's possible to transfer minds from one body to another. In a more light-hearted mood, *The Orville*, which is set to launch in fall 2017 on the US channel FOX, centres on a not so top-of-the-line exploratory ship in Earth's interstellar fleet, 300 years in the future.

Gathering with a family

Whether these characters want to confront reality by looking for authenticity, or by trying to understand each other, or even by escaping to another space and time, this season proves that getting together with family and loved ones builds bonds to help face reality and life together. >

Sometimes, people decide to confront the reality with a new family, a family they've chosen themselves.

Access to a unique volume of TV and Online data



WORLDWIDE CONTENT AND AUDIENCE INSIGHTS

Eurodata TV Worldwide is the specialist of international TV markets and the unique provider of **official TV ratings of 7,000+ channels** in more than **110 territories.** Eurodata TV Worldwide **tracks and monitors** the latest TV and online contents and gives insight analyses based on **global expertise.**

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Email: eurodatatv@eurodatatv.com

www.eurodatatv.com

Eurodata TV
WORLDWIDE

One of the best examples of this trend this season is the American hit series, *This Is Us*. Launched on NBC in September 2016, the series follows three siblings throughout three different times in their lives: birth, childhood and present day. For 18 episodes, viewers follow the evolution and unforeseen developments the families go through, and how events from the past affect their beliefs and actions in the present. On the factual side, and also a worldwide hit this season, is the documentary *Planet Earth II*.

In the BBC hit series narrated by Sir David Attenborough, viewers watch a string of episodes, featuring different kinds of animals and habitats around the globe with one main thread: building a family and protecting it in a dangerous environment. Sometimes, people decide to confront the reality with a new family, a family they've chosen themselves. In Flemish Belgium, VTM launched *Amigo's* in January 2017, a humorous series about five ex-prisoners who try to start a better life by setting up a restaurant. Jumping on the bandwagon, competitor public channel, Eén, will launch the series *Tytgat Chocolat*, a combination of a road trip and a love story about a group of mentally challenged workers at a Flemish chocolate company.

Source: Médiamétrie / Eurodata TV Worldwide / NoTa International TV Trends 2016-2017 / Relevant Partners

Gathering with a family

This is Us

NBC, USA

Distributor: 20th Century Fox Television Distribution

September 2016

18-49, 18 episodes

+130%*

Planet Earth II

BBC One, UK/USA/France/China/Germany

Distributor: BBC Worldwide

November 2016

4+, 6 episodes

+87%*

Tytgat Chocolat

Eén, Belgium

Distributor: Flanders Image

Coming Up

**Rating evolution vs regular time slot. Source: Eurodata TV Worldwide / NoTa / Relevant partners – All rights reserved.*

Interview.

Success Story: UFA

Interview with Nico Hofmann, CEO of UFA, to learn how a very strong local production company like UFA managed to become a successful international company.

Nico Hofmann
CEO
UFA

What has been your biggest international success so far?

I would definitely say the two TV series that both received the international Emmy award. The first really big success was *Generation War,* a WWII story basically about my own father and what happened during the war to that generation. It was a very controversial film, not only in Germany but worldwide. A lot of topics, feelings and emotions came to the surface from a generation which is now 90-95 years old. Another big success was surely *Deutschland 83;* other than winning the international Emmy, it was also seen in more than 110 countries around the world, and a huge hit in the UK on Channel 4.

Where do you get your inspiration from?

First I was a director and now I've been a producer for almost 20 years. Most of my films in these years are based on factual German History; about WWII, but also about the reunification of the Eastern part of Germany. It was really a decade of big interest for the audience that has to do with a long search of German identity. ➤

We called it cinema for the big screen on television: so the production value was very high because they were TV events as cinema pieces.

Deutschland 83

So there was a huge appetite on the viewers' side to watch these films, but at the end of the day, it was really a personal approach, taken from my own family history. I was always having big debates with my parents about their lives in the Third Reich but also the aftermath of the Third Reich; how they came back to somewhat of a normal life in a democratic country. It really opened up a market. We called it cinema for the big screen on television. The production value was very high because they were TV events as cinema pieces. In the last three years, we really opened it up even more internationally, which we saw with the success of *Deutschland 83*.
The show was written by an American writer, Anna Winger, and it's a different style, very international, not typically German. The historical topics were the same but the angle was much more ironic, fresher and edgier. That's why we continue working in cooperation with Fremantle, Amazon and RTL; sharing a big platform market with RTL is a unique opportunity for us.

Is there a German touch in storytelling?

There are really no boundaries now. People are coming from German film schools and working for German TV, then working all around the world, nearly everywhere. Florian Cossen, who's one of the directors of *Deutschland 86*, for example, has done a huge and successful co-production about the NSU last year. The younger generation is building up their own style and bringing fresh ideas. My hope is that we get an individual style with different directors and show runners, but not by individual country.

How do you explain the success in the US?

I'm sure it has to do with the way it's written. You can feel the difference in the style: it's totally focusing on the creativity of Anna Winger, the creator and head writer of the series. She brought her own touch to the production, her way of telling German history. Sometimes the German way can be didactic; everything is based on true stories and facts. Here it's very ironic and humorous, which is not typically German.

Do you feel that you have a duty to younger generations?

Yes, I'm absolutely sure we're doing that and I'm very proud of it. Our films are used in more or less 80% of

Generation War

the programmes in high schools. Of course it's very controversial as many historical topics are, you never have one agreed opinion amongst historians. What we have learned is that you always have a very personal viewpoint to talk about History. Yet or probably because of the controversy, our programmes were very successful, like the bombing of Dresden or the event movie about the refugees coming from the Eastern part of Germany in the end of WWII. Both programmes had about 40–50 million viewers, more or less everybody in Germany saw it. I think we speeded up the progress about German identity in the past few years speaking about it frankly. For me it's a very positive outcome with an enormous impact.

Is fiction the main vector to talk about history?

Firstly, I think you have much more freedom in storytelling. Nevertheless, the historical research is a big part of the writing and very detailed and precise. It is coming directly from authentic historical data, and is quite close to what really happened. We also have historians, who are working together with us. ➤

The most important rule is that it has to be authentic, unique and new.

My hope is that we get an individual style with different directors and showrunners, but not by individual country.

Charité

But you have a much more complex structure; if you have, for example, an 8 or 10 part mini-series, which is what we do now with *Deutschland 86* and *Deutschland 89,* at the end of the day we'll have 20 more episodes to tell the story. It's fascinating how deep you can delve into the characters and German History, but also world History.
We're telling the story throughout the Cold War, the fall of the Berlin wall. There are so many elements to talk about from 1983–1989, it's fascinating. You can build up much more complex characters, and people love to watch it. There's a huge difference between a big fiction show and a documentary on German TV. The big fiction shows are drawing three times more viewers than the documentaries, based on so much more material and, of course, you need much more money to produce it.

Do you write with a specific target group in mind?

Yes, we really talk about who we want to reach each and every time before we start the production: is it for a certain platform or for a very young audience, are we trying to get the biggest audience in the evening programme? It's a crucial discussion to have; we want to be very clear and focused about our target group. We had a very huge success a few weeks ago with our mini-series *Charité,* about a big hospital in Berlin that drew in more than 7 million viewers. It was produced for that exact purpose, to get a mass audience in the evening.

How do you adapt to the new way of consuming video content?

In Germany, people can have the choice between 120 programmes every night, so they have a distinct decision to make about what they want to watch. But there's a very clear rule recently: they are only interested if it's authentic, unique and new. If they have the feeling that they've seen it before, they'll switch it off. So you have to bring really fresh new ideas. The other thing we noticed is that it's helpful to get the younger generation actively involved; young cast, young storytelling and young directors on the show, e.g. from the film schools. We recently had a lot of success on the second public channel ZDF about a dancing school in Berlin called *Ku'damm 56,* set in the 1950s. It was a huge hit as well on the media page and platform. We really got the target group, even the 15 and 20 years old, because it had a very young cast and was done in a very modern way.

Do you develop new concepts for the international market?

That's the most exciting prospect at the moment. I just saw what's in the pipeline for the next 5 years and I strongly support how Cecile Frot-Coutaz is pushing the fiction market, which is growing stronger and stronger. It's something that Fremantle is really powerful at right now. They had such a big success with *Young Pope* and *American Gods* and also with our production *Deutschland 83*. I'm pretty sure that the American platforms will turn out more heavily in the next five years than they do at the moment. So, the whole fiction strategy is a huge perspective for me. I feel greatly supported in the group, with my own material, and that gives me a lot of hope.

What's the biggest challenge for the future?

The biggest challenge is really to have the best creative people on board. It's all about content and creativity. I see a lot of younger start-ups coming with fresh money, and the Americans doing the same thing in Germany with younger start-ups. It's our major goal for UFA, but especially at Bertelsmann and RTL Group we have to get the most creative people and exciting talents to come to us in order to survive the next 10 years. The other thing is to have a clear distinction about what we can produce for platforms, for bigger channels, and where audience trends are going. So the debate is much deeper and more complex than ever before.


TANZSCHULE

Ku'damm 56

Titanic
20th Century Fox

It's True Even If It Never Happened

On Cult classics, myths and true success

Star Wars, Harry Potter, The Lord of the Rings, Titanic, Pretty Woman, The Matrix – these are all cult films and box office hits, which are sure to outlive contemporary fads. They belong to the collective consciousness of entire generations. They frequently involve totally complex stories whose meanings simply escape us at first glance. Still, they fascinate us. Is there something that they all have in common? Yes!

Carsten Göttel
Programme Director
SUPER RTL

The monomyth

In all of these films, the story involves the big picture, or the profound; fundamental, universal ideas that stay with us our entire lives. When these recurrent patterns of our experience are processed into narratives, they become mythical tales. They tend to follow a certain scheme, according to the mythologist Joseph Campbell. It is the so-called hero's journey or "monomyth", a basic pattern which he deciphered after analysing thousands of historical myths. Campbell's classic model has since become a blueprint used by scriptwriters and fiction authors alike; a manual for good storytelling. It's composed of three acts, which comprise twelve chapters, in a strict systematic scheme, revolving around the central figure.

Let's now apply this method to cult classics to find out whether they too follow Campbell's hero's journey. But let's not be too pedantic. We'll focus only on the three central acts and emphasize the parts that are representative of the whole. >

"Though this be madness, yet there is method in't"
Hamlet, Shakespeare

1. The departure

Mythological tales always begin in the hero's homeland, often a place that evokes longing. We might think of the Shire, the idyllic home of the Hobbits. But in *The Lord of the Rings*, and many other classics, the characters abandon their comfort zone. Why is it that all of the protagonists in the cult classics do this? It's the call to adventure, with all its seduction and fantasy. It can be symbolised by an invitation, as received by Harry Potter from the Hogwarts School of Witchcraft and Wizardry, or a call for help as received by Luke Skywalker in *Star Wars*. Sometimes the hero's destiny leaves no choice. Consider Peter Parker, who, as Spiderman, is forced into an adventure by a spider's bite. In *Pretty Woman*, the filthy rich Edward meets the hooker Vivian, who shows him the way to his hotel. In this case, they both end up gaining insight into a totally new world. These encounters evoke the call to adventure.

"I'm trying to free your mind, Neo. But I can only show you the door. You're the one that has to walk through it."
Morpheus, *The Matrix*

The mentor

In the departure phase, the hero may initially refuse to yield to his or her fateful calling. It's then that a mentor appears to give the decisive nudge needed to undertake such a daring adventure. These are mentors like Dumbledore in *Harry Potter* or Gandalf in *The Lord of the Rings*. Luke Skywalker in *Star Wars* is shown how to exploit the powers of the force by Yoda. The hotel director in *Pretty Woman* helps

Harry Potter

Vivian out with the right outfits and also instructs her in proper table etiquette.
Thanks to the mentor's impetus, our hero ultimately and irrevocably embarks into the world, and an uncertain future.

2. The journey: no pain, no gain

On the journey to a new world, there are unanticipated visitors. New enemies appear, but also new friends. In *Harry Potter*, Hermione and Ron are at Harry's side. In *The Lord of the Rings*, Frodo can count on his fellow hobbits Sam, Pippin and Merry. In *Star Wars*, Luke Skywalker meets Han Solo and Chewbacca. A host of characters teach our cinema heroes the rules of the world. It's at the very pinnacle of their journeys that they then plunge into some dark abyss, where a decisive battle awaits them. Armed with newfound experience and resourcefulness, they may prevail.
The protagonist is face-to-face with a seemingly invincible foe. But somehow, by reaching deep inside, some unexpected source of strength is found to combat his or her fear. Frequently, this is symbolised as the greatest inner fear that has been harbored for a lifetime. For Luke Skywalker's legendary battle with his father, Darth Vader, Luke is also battling with himself. It's an interior battle as well as exterior battle. Or, simply consider the rebellious gestures of Rose in *Titanic*. She hides from her fiancé and instead accepts Jack's gift, which symbolises her new independence.

3. The homecoming

In *Pretty Woman*, Vivian, fully transformed, continues her bourgeois existence; she ends up going back to university and starts a new life. Luke Skywalker is victorious in the decisive battle in *Stars Wars*, when he destroys the death star. Afterwards, he returns home to join up with Jedi Knights.
In the course of their travels filled with trials and tribulations, our heroes grow up. They are transformed from creatures of dependency to self-reliant forgers of their own destinies. Their final task is to pass on their new wisdom; they must now take on a new role of responsibility, and with that the hero's journey is over.

"Where are we really going? Always home."
Novalis

"The cave which you fear to enter holds the treasure you seek."
Joseph Campbell

Upshot

Cult cinema and box office hits all operate according to the same methodology. As different as these stories appear on the surface, they are based on the scheme of the hero's journey, or monomyth, as coined by Joseph Campbell. Existing beyond space and time, these mythical stories are fictitious yet true – the "forever-always there", as Thomas Mann so aptly called it. Ultimately, the hero's three-act epic of departure, journey and homecoming is a reflection of life itself. **x**

Entertainment Evolution: Online Screens, OTT and New Technologies

Four-screen measurement started in September 2016 in France on the main channels, and it's already had a strong impact on the viewing figures, especially for the channels watched by younger viewers.

Abed Laraqui
International Research Manager
Eurodata TV WORLDWIDE

Among the channels whose online screen ratings were measured, W9 has boosted its entertainment show audiences – the most thanks to tablets, computers and smartphones. This viewing behaviour is completely in line with the channel's audience profile, which is younger than the other channels studied in the report.

Additionally, when looking at the programmes that have the biggest online screen audience, it's interesting to note that they also have a large proportion of young viewers. This suggests a strong correlation between the results of online screens and the number of young adult viewers.

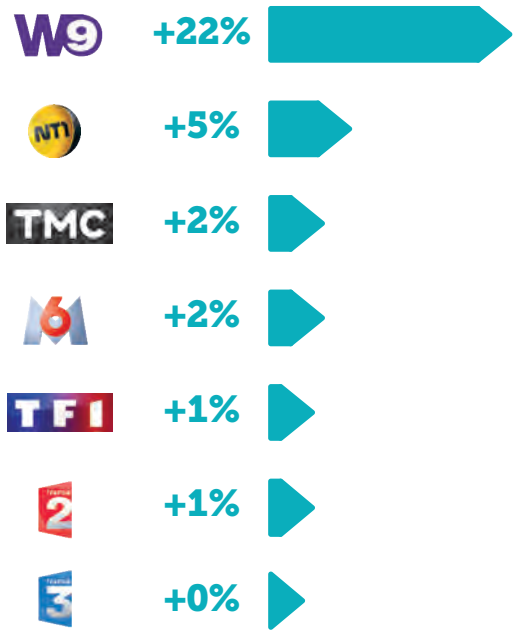
Les Princes de l'Amour, the second best programme in terms of additional viewers on the 3 online screens, also has the biggest proportion of 15- to 24-year olds in its TV audience. Overall, W9 is leading the way with *Les Marseillais et les Chtis vs. le Reste du Monde* in the top two slots. The show gains 257,000 viewers on average on other screens. Coming in third is the local adaptation of *Married at First Sight* on M6.

Overall, regarding the split by screen, the online screen that's most often used for TV viewing is the computer. Among the studied channels, it represents almost half of the total online viewing. ➤

The online screen that's most often used for TV viewing is the computer.

Entertainment additional viewing on other screens vs TV

Prime time only



Sources: Médiamétrie / Médiamat – September 2016 – February 2017

Mariés au Premier Regard

M6, France

Top programmes on the 3 online screens

3 screens average contribution

+257,000 viewers
+27%

+180,000 viewers
+28%

+142,000 viewers
+4%

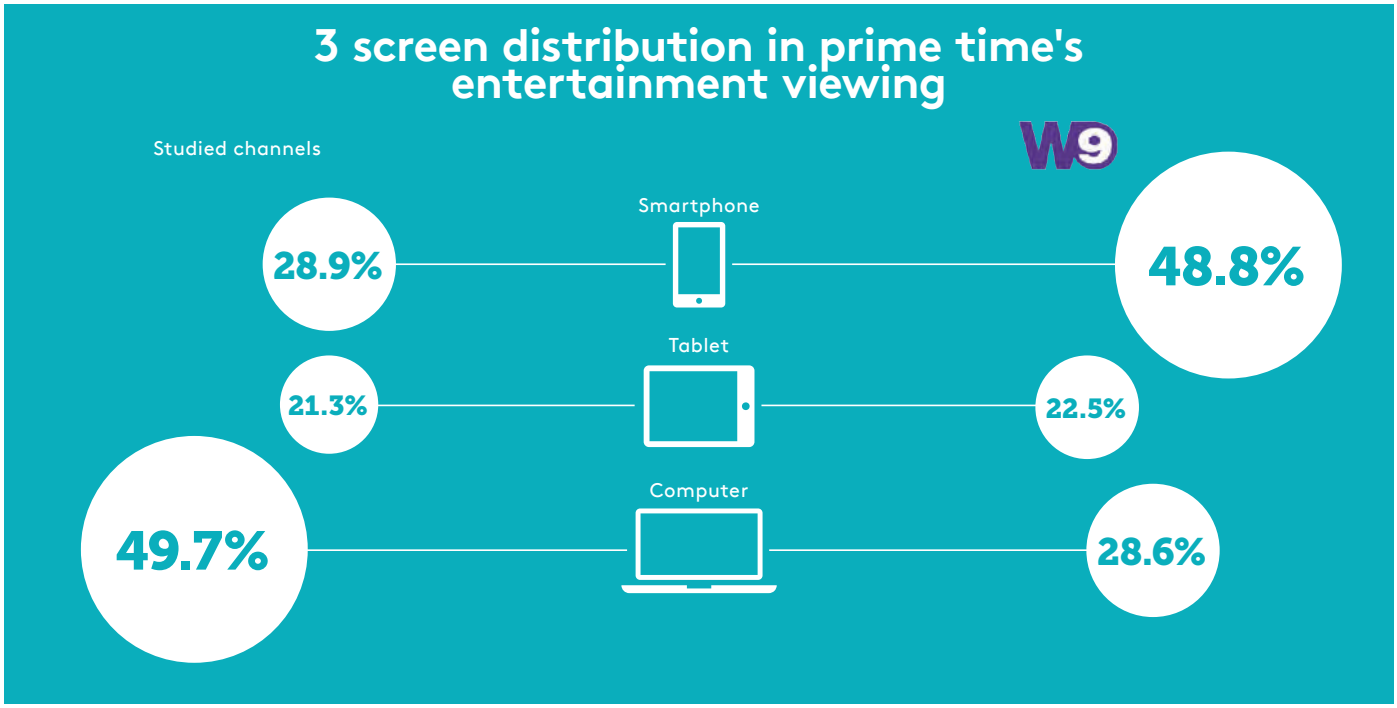
Sources: Médiamétrie / Médiamat – September 2016 – February 2017.

However, on channels that attract young viewers, the smartphone takes the lead. For instance, on W9, smartphones have the upper hand, representing almost half of the total online screen viewing.

The increasing importance of online screens in unscripted content

At the beginning, online screens were used to emphasise the reach of traditional, linear entertainment programmes. Channels and producers created additional content on other platforms based on the main programme: mobile games, online or social media companion shows. The idea behind this supplementary content was to boost the programme and strengthen the original broadcast; it wasn't included in the show's original structure. Then, new technologies came in handy by immersing the viewer in the main programme thanks to live streaming and VR experience. The next step is to use all of these

The Stream gives musicians a chance to be discovered through the internet and social media by getting participants to upload their videos to an online platform. Viewers then share and stream the performer's music, with the top 100 most streamed musicians then being invited to perform in front of a panel of music industry experts. When the artists have been signed, they compete in a weekly live show, with the most streamed artists staying in the competition and the least streamed risking eviction.



technologies and platforms to create global concepts across the board. The number of programmes following this strategy is on the rise.
In fact, new shows like *All Against 1* (DR1, Denmark) have already kicked off the trend of using online screens. The show's multi-screen mechanism is quite basic and was a huge success with the audience. The potential for TV multi-screen and cutting-edge technologies is limitless, and the latest programmes are jumping on board with these possibilities.
Another notable platform is *The Stream,* which was a huge success in 2016 in Norway on TV2.

The rising stars of entertainment

While TV teams up with tech firms, OTT platforms are the new trend and have recently started to broadcast entertainment shows. Chinese platforms are way ahead of the game on that matter, but US platforms only recently tapped into it. After producing scripted series and then documentaries, they enlarged the spectrum of streamed genres to offer entertainment programming. According to 7PARK DATA's newest study of OTT viewership, reality TV viewing is up 10.3% from last year on Hulu and up 28.3% on Netflix – making reality one of the fastest rising genres for the two services. It's also interesting to note that while Netflix and Amazon originated from scripted content, Apple Music – which announced two entertainment shows, *Carpool Karaoke* and *Planet of the Apps* – directly broke into the entertainment market. This is a logical strategy, as the music world and the entertainment world have strong ties.

While TV teams up with tech firms, OTT platforms are the new trend and have recently started to broadcast entertainment shows.

Secret Story

Plug RTL, Belgium

Golden Moustache

MPN
& Original Content

The growth in audiovisual crowdsourcing content – calling for ideas from a crowd of people (YouTubers) – has never been as evident as it is today. With millions of subscribers and viewers per month, YouTube channels have started to play a key role in the audiovisual market.

Siglinde Martínez
Media Consultant
Eurodata TV
WORLDWIDE

The growth in audiovisual crowdsourcing content – calling for ideas from a crowd of people (YouTubers) – has never been as evident as it is today. With millions of subscribers and viewers per month, YouTube channels have started to play a key role in the audiovisual market. YouTube videos are versatile, flexible and have a big advantage: they can be produced at a low cost and create a big impact. Moreover, they can be launched to test the audience's response and re-launched if they're successful.

As this content can be customizable, marketers have seen a tremendous opportunity for their brands and are considering innovative ways to work with YouTube celebrities. In general, Multi-Platform Networks (MPNs) are the main intermediary between influencers and brands. These MPNs have a pool of YouTube channels from which marketers can select the best influencer that matches their brands' DNA to produce branded content. Among the most important MPNs are Awesomeness TV (acquired by DreamWorks Animation), Fullscreen (owned by Otter Media – a joint venture between AT&T and The Chernin Group), Maker Studio (acquired by The Walt Disney Company), among others. >

Some MPNs have moved towards being digital-first production companies.

MiTú Network's reach has become such a success that the platform even became a political tool by launching the multi-platform campaign TACO (Take Action, Commit Others) in May 2016.

To compete with these big MPNs, other companies have started to specialize in niche markets to offer expertise and to help brands fine-tune their research. This is the case for MPN Machinima (owned by Warner Brothers) which is specialized in video games, or StyleHaul (owned by RTL Group) whose YouTube channel catalog is specialized in fashion, beauty and lifestyle.

However, branded content has started to be available beyond YouTube and has also moved to Facebook, Instagram, Snapchat, Twitter, among other "off YouTube" social media sites. Some MPNs have moved towards being not only an intermediary between YouTube influencers and brands, but also digital-first production companies. Awesomeness TV's business model, which – besides being an intermediary – set up an entire team to produce original content to match brands' DNA, and other niche MPNs such as MiTú Network have followed suit.

Brands & MPN: joining forces

MiTú Network is a MPN especially focused on targeting *millennial* Latinos living in the US – who are now becoming *billennials (bilingual-millennials)* – with more than 6,000 video creators and 2 billion accumulated video views each month on YouTube. It offers brand-funded content exploiting its already well-established digital media brand. Knowing that Hispanic billennials have a strong desire to keep in touch with their cultural background, MiTú Network

Multi-Platform Networks (MPNs)

Generalist MPNs

MAKER, OCTOLY, FULLSCREEN, AtV

Specialized MPNs

Latino: mitú

Animation: Channel Frederator

Video Games: MACHINIMA

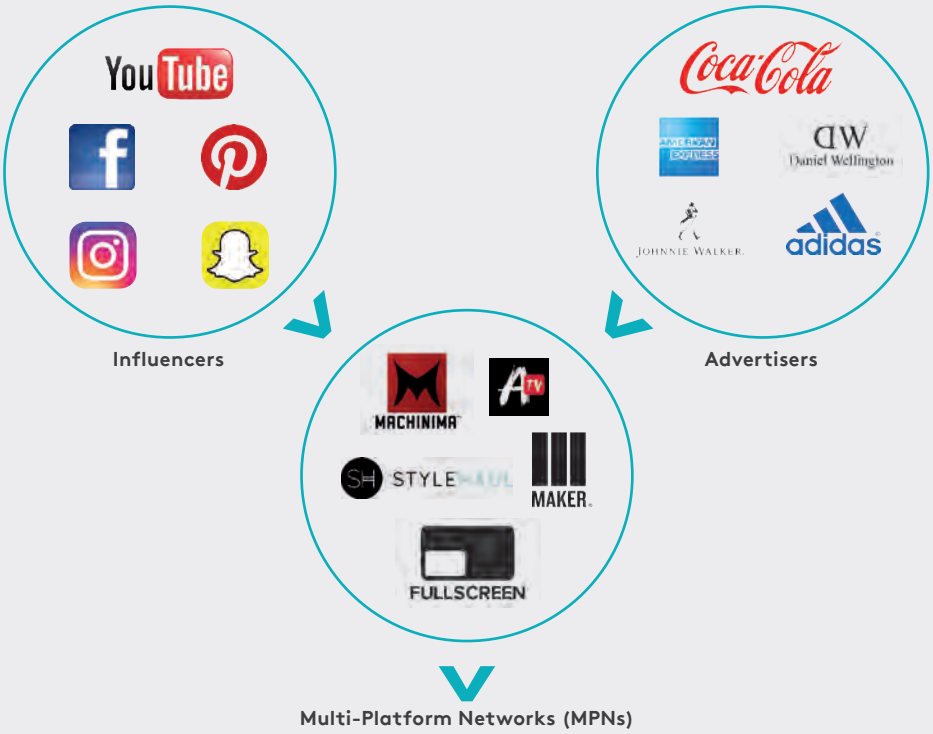
Food: Tastemade

Sports: WHISTLE SPORTS

Mode: SH STYLEHAUL

A standard business model

MPNs are more than intermediaries, and have expanded to become also talent networks, content producers and marketing advisers. In this model, YouTubers and brands are in contact through a MPN.



Intermediaries + Talent networks + Content producers + Marketing advisers

has taken advantage of this by producing original content which Latinos can identify with. Brands such as MLB (Major League Baseball), whose aim is to attract young multicultural Latinos for its February 2017 season, spotted this opportunity and sealed a creative partnership to produce "Always On", a campaign built to generate original content around the baseball season. Producing around 300 pieces of content every week, MiTú Network's impact on the Latino community is important: not only do these pieces of content evoke childhood memories and grandma's sayings, they also make viewers discover other Latino expressions and share them with non-Latinos by translating them into English.

MiTú Network's reach has become such that the platform even became a political tool by launching the multi-platform campaign TACO (Take Action, Commit Others) in May 2016. This political campaign, whose content gained around 75 million media impressions, involved original content, apps and challenges to mobilise the Latino millennial vote. More recently, in November 2016 the former President of the United States, Barack Obama, and the actress Gina Rodriguez, partnered with MiTú Network to empower the Latino vote for the 2017 elections.

Another important MPN targeting Latinos in the United States is Univision Creator Network (UCN). Since the beginning, Univision production facilities and media resources in Los Angeles and New York have helped UCN to advance. This has not only attracted influencers, who eagerly wanted to join UCN to increase their value and visibility, but also brands such as Kia, AT&T, P&G, Target and Honda, who wanted to produce branded content. ➤

It seems that MPNs are no longer merely intermediaries, but rather talent networks, content producers and marketing advisers.

The McClure Twins

Honda produced with Flama (a communication division of Univision) *The Tamal Taste Race*, a video lasting 6 minutes with the influencer Josh Leyva in pursuit of finding the best Tamale in Los Angeles.

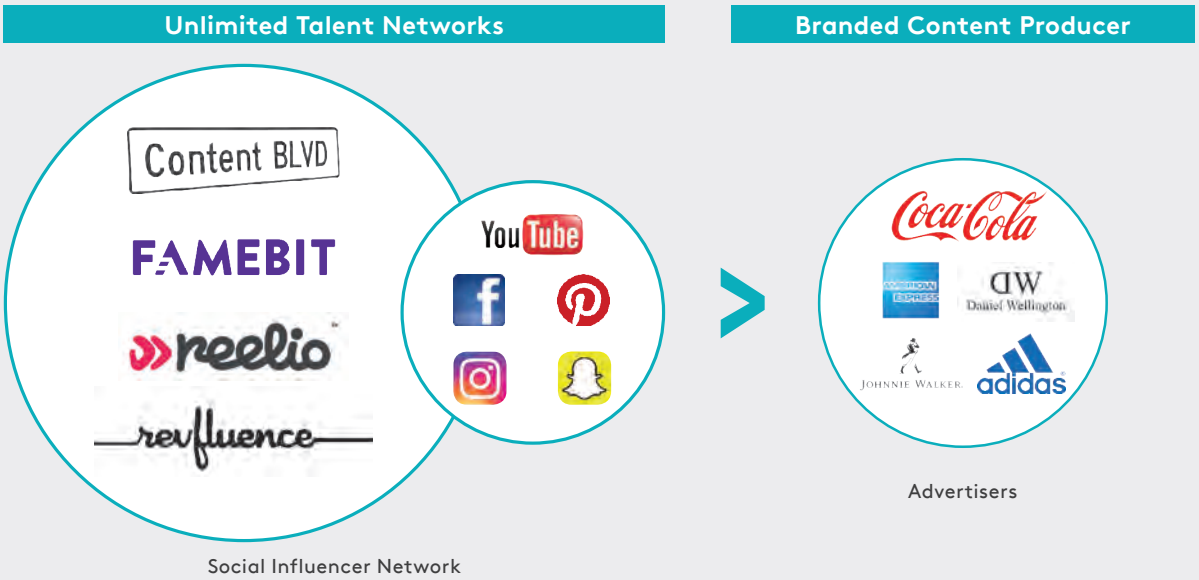
Social influencer network

As marketers get used to this new ecosystem, they need more direct contact with YouTubers, without limiting themselves to the affiliates of only one MPN. Brands that look for simple agreements with influencers can contact them via web-based marketplaces like Reelio, Content BLVD, Revfluence or Famebitt – acquired by Google – which are also known as Social Influencer Networks.

These new web-based marketplaces have a fresh advantage which is that they consider "long- and mid-tail creators", allowing marketers to look for new emerging talent that matches their brands' DNA, and not only going after the well-established influencers. This again shows that the desire for YouTube content is real; it's transforming the strategy of media companies who are now taking this disruptive pattern and transforming it into a new business model.

A new business model

Web-based marketplaces known as Social Influencer Networks. These platforms allow a simpler and more direct agreement between the YouTuber and the brand, without limiting themselves to only one MPN affiliation. (A kind of talent pool of Youtubers that can be contacted directly. No need to discuss with the intermediary, the MPN.)



Insight Trends.

In a Total Video world, advertisers have to take investment decisions based on ever changing advertising possibilities, as well as "alternative and competing" truths in media research and measurement. Which figures are "the truth", which are just "fake truths" and how can advertisers navigate their messages to their prospective customers? In the end, they ask themselves: where can stability be found on which to base effective and efficient media plans?

Daniel Bischoff
Marketing Director
RTL/AdConnect

With the keen insight from contributors in this *TV Key Facts* issue, advertisers will find answers, orientation and advice on how to tackle the total video world successfully. Starting with two great articles looking at the Kids' target group from different perspectives, one can already grasp some new – or maybe old? – insights.
As Cornelia Krebs from Mediengruppe RTL Deutschland argues, kids need continuity in brand messages and it has to cater to their needs of safety, but also curiosity. Rupert Schäfer from Nunatak Group takes a different angle on the topic of kids and media, describing a connected kid's world. Both acknowledge that kids' communication and media needs evolve with their age, and brands need to accompany them along this journey; they need to become anchors of continuity in an age of instability.

Television remains the gravitational centre of the total video world. Both Duncan Stewart as well as Alain Beerens take a look at the power of television in their articles, again from two different angles. Stewart delves into the viewing time of millenials and comes back with a counterintuitive thought for today's media discussion – the decline in TV viewing of millennials appears to level off, at least when looking at US data. The disruptive effects of VOD, SVOD and mobile devices on the media usage of millennials seem to flatten out and television remains the video base with over 2 hours per day for 18- to 24-year olds. Beerens argues that television remains "resilient in an era of immense disruption" and that all other forms of media develop better ROIs when combined with television, especially digital video.

Quantico

M6, France

Audience Measurement Is Catching Up on TV Consumption Habits

Eurodata TV Worldwide's *One TV Year in the World* report gives an annual overview of TV consumption and audiovisual landscapes in more than 100 territories around the world. In 2016, the daily TV viewing time is still solid with 3 hours per individual. To give even more accurate ratings in the upcoming years, TV audience measurement institutes are looking at ways to deliver a fully unified 4-screen TV audience measurement.

Florent Carême
Head of Research
Eurodata TV WORLDWIDE

TV consumption worldwide

Worldwide daily TV viewing time: waning but still solid

TV viewing time calculated over the total population of 92 countries worldwide reaches the very round number of 3 hours per day per individual, a figure averaged over nearly 3.9 billion people. This is a 3-minute decrease compared to 2015, a very similar dip to the one observed last year. This decrease is a tendency shared by most regions in the world, and is stronger in North America and Oceania. However, a noticeable exception is South America, where the average daily TV viewing time has significantly increased between 2015 and 2016. Although on a decline, 2016's average daily TV viewing time is still very high and remains mainly steady from an evolutionary perspective of nearly 25 years. On a regional level, this long-term outlook shows that Europe is at a consistently high level and that South America is on the rise, while North America, the Middle East and Asia show more significant decreasing tendencies.

The good news is that 4-screen TV audience measurement became accessible to the market in 2016.

10%

Average audience boost among Young Adults

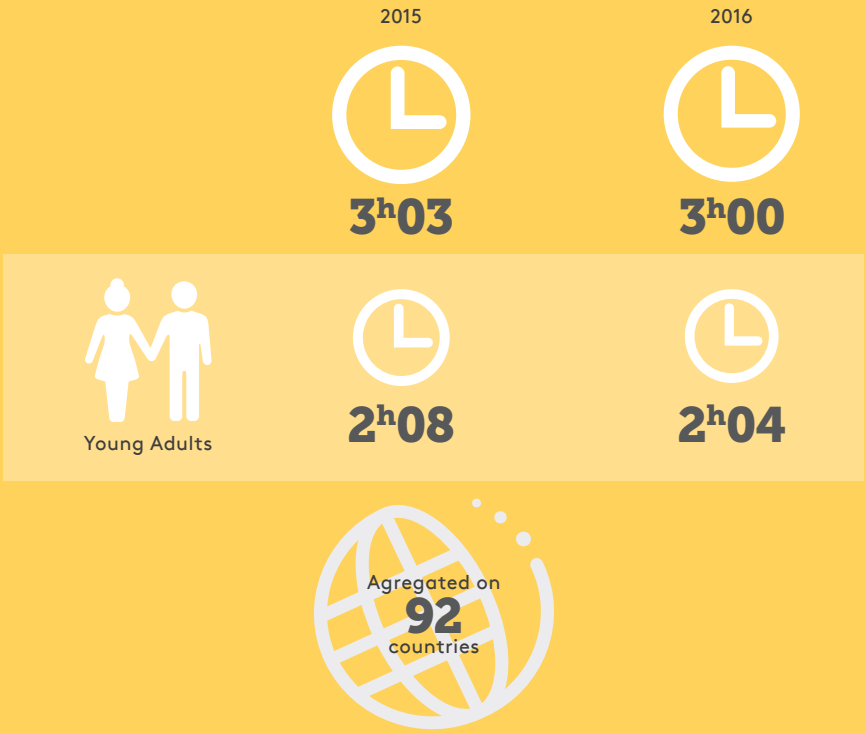
/ Online figures are sometimes impressive, but are in no way comparable to the TV audience figures the market is actually dealing with.

Time-shifted viewing on TV sets makes headway

In 2016, 39 countries measured time-shifted viewing in their TV audience measurement.

In the 30 countries where the split between live and time-shifted viewing is available, we note that time-shifted viewing brought in an audience hike of 7% on average in 2016, over the entire population and the entire day. This percentage has slightly increased over the last few years. However, it should be noted that, overall, most TV viewing remains live. Of course, the weight of time-shifted viewing strongly depends on the studied market; countries like the United Kingdom, Switzerland, the United States, Belgium, Ireland and Canada show a far better performance in that respect. A similar analysis of young adults shows parallel trends. Although we note a stronger slump in

Worldwide daily TV viewing time



Based on total individuals, total day. Computed on 92 countries. Guests and time-shifted viewing included when included in national audience currency.
Averages are weighted with the country's TV universe for total individuals and young adults.
Source: Eurodata TV Worldwide / One Television Year in the World 2017 issue / Relevant Partners – All rights reserved

the total daily TV viewing time amongst young adults compared to the whole population, this decrease mainly impacts live viewing and not so much time-shifted viewing, which remains steady.
The relative audience increase among young adults is therefore stronger than for the whole population; we've recorded an average audience boost of nearly 10%, which has been slightly rising for the past two years.
This analysis shows that an important part of the TV consumption measurements are lost in the mix: TV content viewed on online screens.

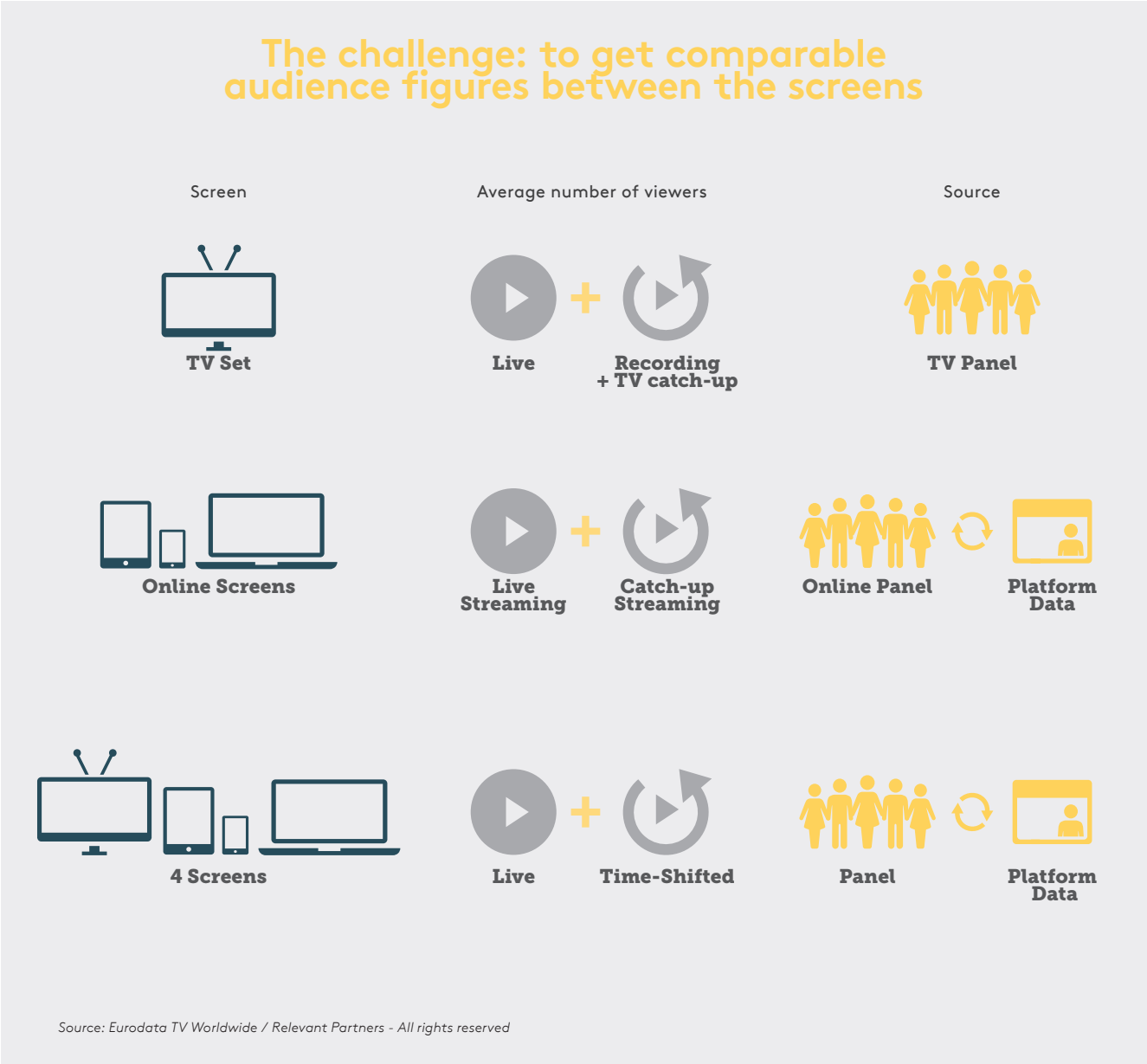
Fully unified 4-screen ratings is a must

A new step in TV audience measurement is in the works

For nearly a decade now, TV audience measurement has been put to the test by new habits in TV viewing. The development of TV catch-up services and hard drives that can easily connect to TV set-top boxes has led to the measurement of time-shifted viewing. This is effective in an increasing number of countries: 39 countries measured time-shifted viewing in 2016, which is 8 more countries than in 2015, and several more has taken the leap in 2017 (Croatia, Serbia, Chile, and more).
However, while more and more online services allow viewers to watch television programmes on their devices (computers, laptops, mobiles or tablets), audience measurements have mainly been limited to those in front of their TV sets – until now. In response to their local TV market needs, many TV audience measurement institutes have worked on ways to pick up these additional figures, to be up to date in reflecting today's new modes of TV consumption. This is what we call a fully unified 4-screen TV audience measurement.
Without access to this key data, channels and platforms communicate about online viewing using the number of launched streams or the number of unique visitors, often adding data over different episodes of the same show. >

France and the Netherlands are among the most advanced countries for online screen measurement of TV programmes.

With 3 hours daily viewing time worldwide in 2016, TV remains the cornerstone of the Total Video world and a unique opportunity for advertisers to develop their communication strategy.



As a result, the online figures are sometimes impressive, but are in no way comparable to the TV audience figures the market is actually dealing with. Let's keep in mind that the most commonly used "number of viewers" figure in TV is weighted in proportion with its viewing duration, which is quite different from the number of launched streams.

So, the first aim of 4-screen TV audience measurement is to provide comparable figures between audiences on different screens. Then, of course, the goal is to provide the market with the same level of precision that is available today for TV-set audience measurement: a variety of indicators (ratings, market shares, reach, coverage, etc.) and targets (by age, sex, socio-economic status, etc.).

Tapping into comparable TV audience figures on all screens will allow the market to:

- **properly take into account the additional audiences** on these screens, especially among

millennials and young adults that are heavy consumers of videos on mobile devices

- **better understand how a programme is watched** in order to adapt its content or its broadcasting format to improve the viewer experience
- **increase the monetisation of TV viewing on other screens.**

Bearing this in mind, the good news is that 4-screen TV audience measurement became accessible to the market in 2016 in some countries (such as the Netherlands and France) and several more have it in the cards for 2017 or 2018, starting with Denmark (launched on 1 January, 2017), the US, Sweden, Singapore and many more!

How does it work?

Let's start with a recap of how TV audience on TV sets is measured. In most developed TV markets, an establishment survey (often updated on a yearly basis) provides us with detailed information on a specific population regarding their TV equipment, TV subscriptions and platform availability depending on their gender, age and revenues. From this data, a TV panel is drawn up to represent the global TV population. Then each household in the panel is equipped with an audience meter that records TV viewing by each panellist. This data is then automatically transmitted to the TV audience measurement institute that projects the TV consumption over the entire studied population. This process allows TV audience figures to include live viewing as well as time-shifted viewing (with some technical adaptations) given a great variety of indicators, such as ratings, viewing times, and coverage, as well as a breakdown according to demographic group.

TV consumption across online screens is far more spread out than viewing on TV sets alone, which makes it difficult to get consistent and accurate 4-screen ratings using only the panel process. That's why the first step in the release of consistent 4-screen TV audience measurement is for online platforms to collect "site-centric" data, or "census data". Unlike panel data, site-centric data gives extensive information about the number of launched streams or the viewing duration, but it comes up short when tracking the exact viewer profile (age, gender, revenue, and so on). With site-centric data we can divide the accumulated viewing duration of a video by its length to get an average number of complete viewings. This ratio is very similar to usual TV ratings. Site-centric data thus provides us with ratings (in number of viewers) for programmes viewed on a live stream or on a replay platform, with a breakdown by screen, but not by target group.

This is why the second step of the 4-screen rating development is to mix site centric data with online panel data, which is thought to be representative of the online video consumer population. This merging between panel data and exhaustive data is called hybridisation, allowing the 4-screen ratings to be broken down by target group, as well as target group percentage, just as usual TV ratings.

First results of 4-screen TV audience measurement

France and the Netherlands are among the most advanced countries for online screen measurement of TV programmes. Major TV channels are already measured on all 4 screens in these countries and the first feedback on online screens (computers, tablets and mobiles) is out. In France, 1 out of 5 people watched TV on an online screen in December 2016, while in the Netherlands, this proportion reached 50% of the population over the course of the same year.

Here's another interesting insight from these online screen results: the audience profile on online screens is very different from the one on TV sets. Although young adults represent only 17% of the TV-set profile, this number rises to 50% for the online screen audience, in place of seniors. This result was to be expected, but it's now confirmed using comparable data! X

France: 1/5 people watch TV on an online screen vs 1/2 in the Netherlands.

The World of Television

We live in fascinating times. Cars drive themselves, men are preparing to go to Mars and artificial intelligence has become an integral part of our lives. The advertising industry, in turn, has undergone tremendous changes over the past decade.

Alain Beerens
Marketing & Communication Manager
egta.

In this evolving media landscape where brand safety and the looming influence of tech giants on advertising is centre stage, there is one value that has stood the test of time: *television*.

The power of TV – often more aptly described as *total vision* or *total video* – has endured more than 10 years of digital disruption and boundless innovation. This is not a random observation or a one-off phenomenon, but a measurable reality across countries, continents and generations, according to research done by *The Global TV Group*.

With *The Global TV Group* as a unified voice, major players in the television industry have rallied around their common cause to get behind TV's new narrative. Determined to walk the talk, the industry is exchanging data and technical expertise to shape a positive message for television.

As industry-audited figures are pouring in from around the world, *The Global TV Group* is, for the first time, able to provide an in-depth, international case for television advertising. This collective voice brings home the unrivalled effectiveness of TV to advertisers and agencies and lets young digital natives in on the myriad possibilities of TV advertising. ➤

The power of TV has endured more than 10 years of digital disruption and boundless innovation.

$1.74

payback sales revenue for $1 invested on TV in Australia.

These collected insights have put forward a number of undeniable arguments.

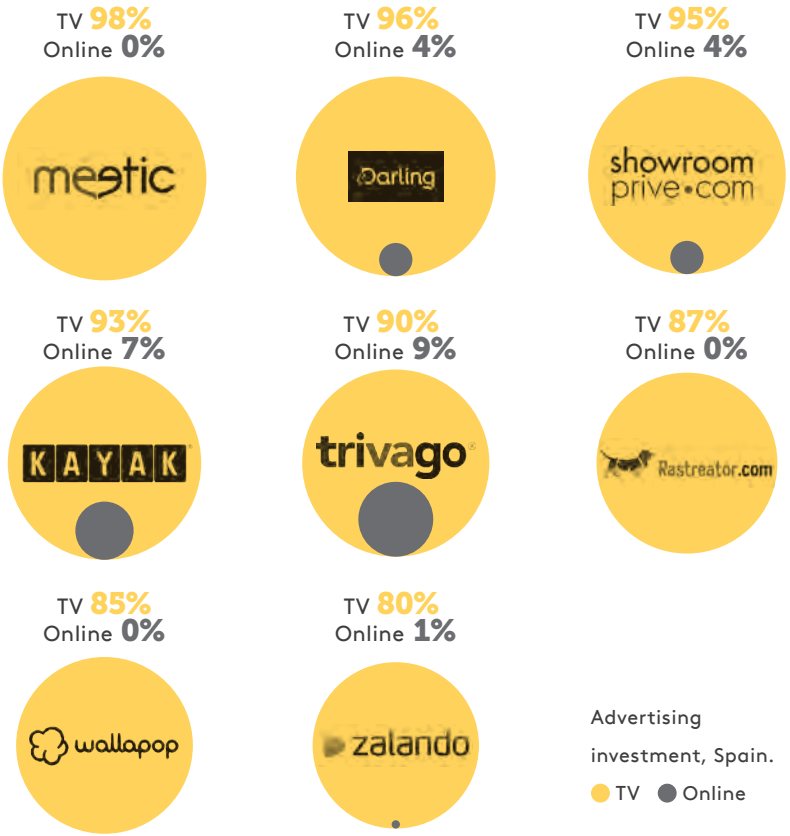
Consumption & viewing

Over the past decade, TV has proven remarkably resilient in an era of immense disruption. Despite the emergence of new services such as Netflix and the further establishment of YouTube or on-demand services, TV consumption has remained steadfast all around the globe. TV viewing across all platforms even steadily increases with age across markets. Furthermore, the unique combination of volume and reach makes television a powerful brand-builder. On average, TV reaches about 70% of a population within a day, 90% within a week and nearly everyone in a month. Likewise, combining television with digital has proven to be another enticing argument. The effectiveness of cross-media campaigns is clear: the combination of TV and digital drives the highest return on investment. TV advertising also remains most likely to make consumers laugh, move them to tears or trigger emotions, compared to other media. This is an essential asset, given that the majority of purchasing decisions are emotion-based.

We do live in fascinating times, but as artist Andy Warhol once said: "They always say time changes things, but you actually have to change them yourself." So enough smugness – with these key arguments and many more, *The Global TV Group* is ready to tell TV's new story and meet the needs of advertisers who are eager for transparent, reliable data and fresh insights. x

Online advertisers have faith in TV

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



Source: Arce media. Net investment 2015. theglobaltvgroup.com

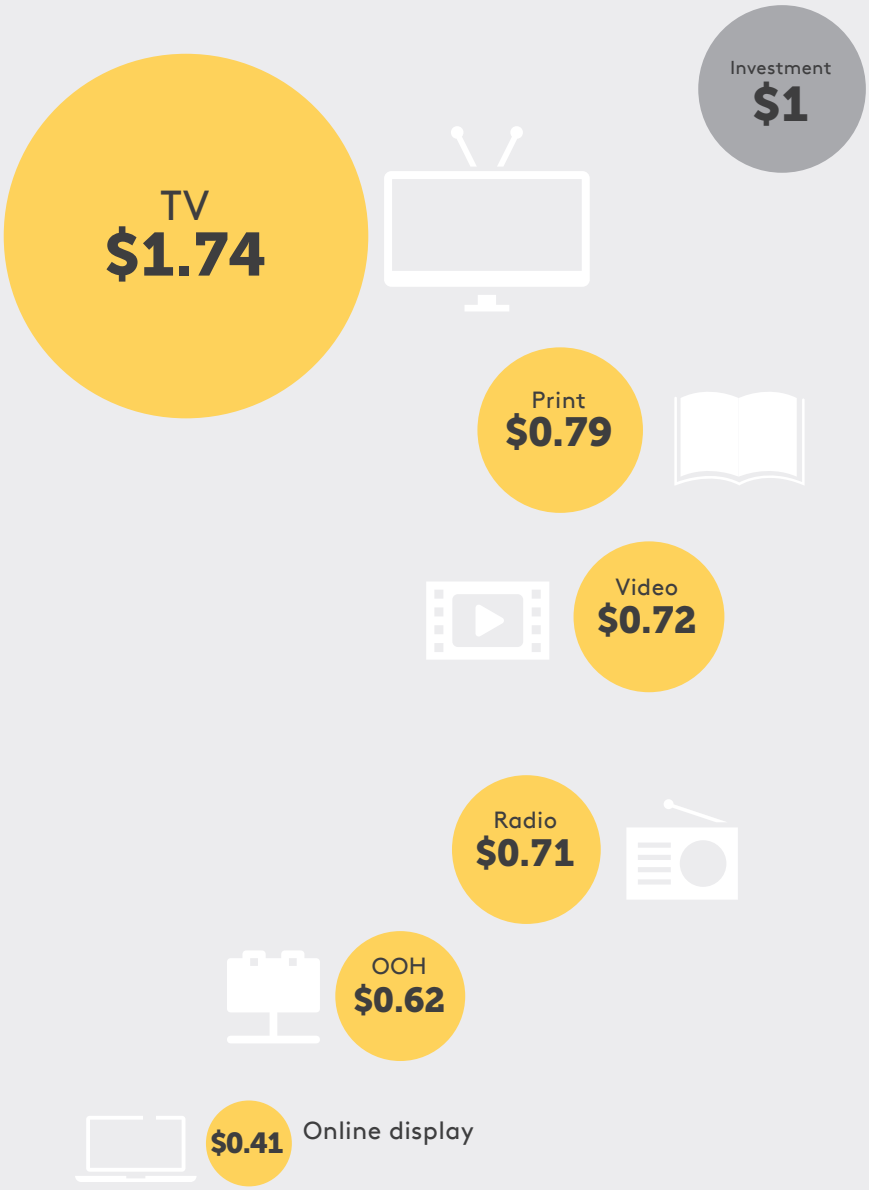
TV undoubtedly generates more money for advertisers

TV is
2x more
effective than online video, print and radio

TV is
3x more
effective than OOH

TV is
4x more
effective than online display

Payback sales revenue for $1 invested, Australia.



Source: Ebiquity & Thinktv Australia "Payback" Study Wave 1 (FMCG, OTC and Beverages) November 2016. theglobaltvgroup.com

The Global TV Group, formerly known as PEPPTV, is an informal grouping of broadcasters' and sales houses' trade bodies in Europe, the USA, Australia and Latin America, whose joint objective is to promote television.

The Global TV Group

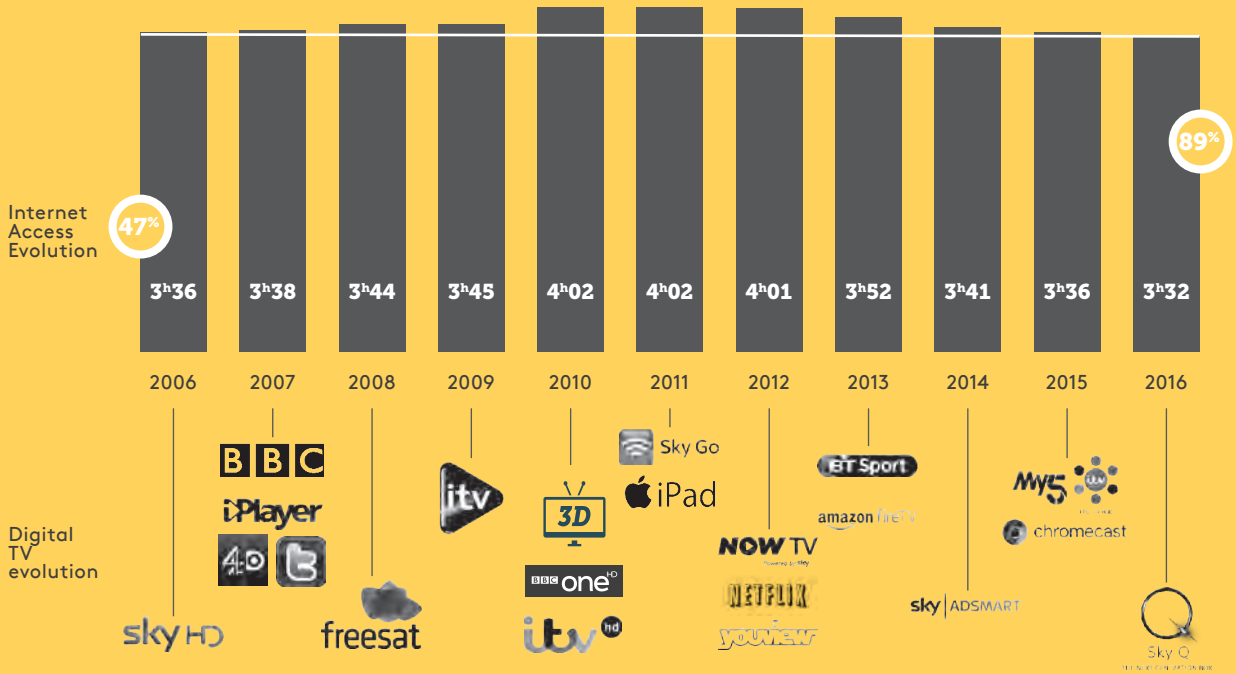
The effectiveness of cross-media campaigns is clear: the combination of TV and digital drives the highest return on investment.

Focus.

Facts & Figures
About TV Effectiveness

Despite a decade of disruption, standard viewing is resilient

Hours of TV viewed on a TV set per day, UK.



*Source: Thinkbox - BARB, 2006-2016, individuals. TV set viewing within 7 days of broadcast. *Ipsos Tech tracker Q1-4 2016. theglobaltvgroup.com*

TV ads have a stronger emotional impact than any other medium

Information

40% of Italians believe that TV advertising is the most useful form of advertising.

Emotion

58% of British claim that TV ads are most likely to make them feel emotional.

Attention

61% of Canadians consumers say that ads screened on TV are the ones they pay the most attention to.

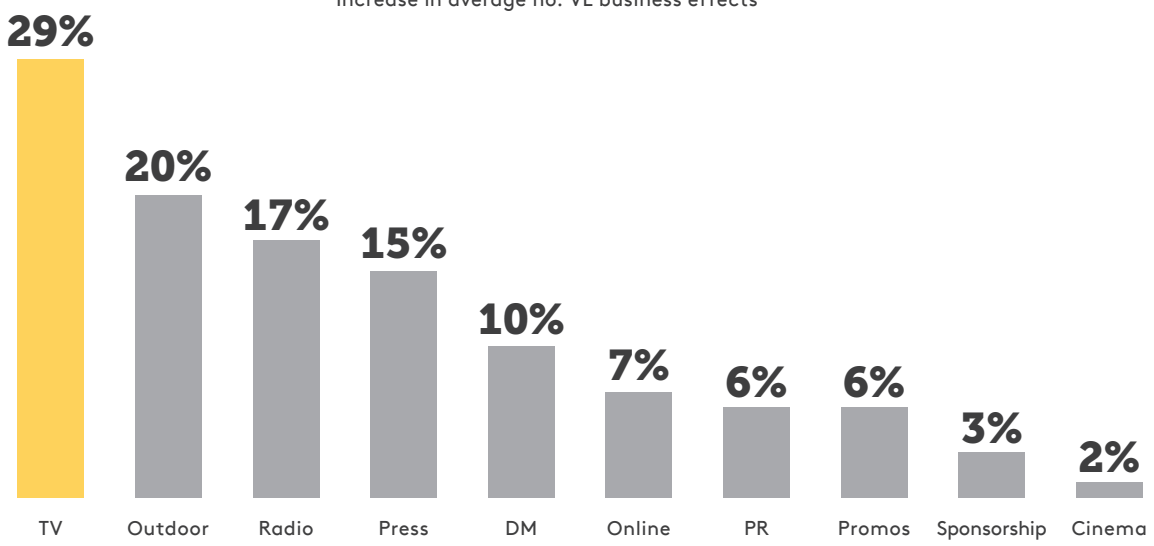
Action

6 in 10 Australians take action as a result of an ad seen on TV.

Sources: Information: GFK TSSP (data for 2016). Sample: 12.000 adult 14+ "Do you think that these kinds of adverts ...are useful for you? Do they give you useful information? Emotion: TV/Ad Nation, 2016, Ipsos Connect/Thinkbox, adults 15+. Question: 'In which, if any, of the following places are you most likely to find advertising that...' Attention: nlogic thinktv OmniVu Survey March 2016. Action: Nielsen Global Trust in Advertising Survey Q1 2015.

TV is the most effective medium ...

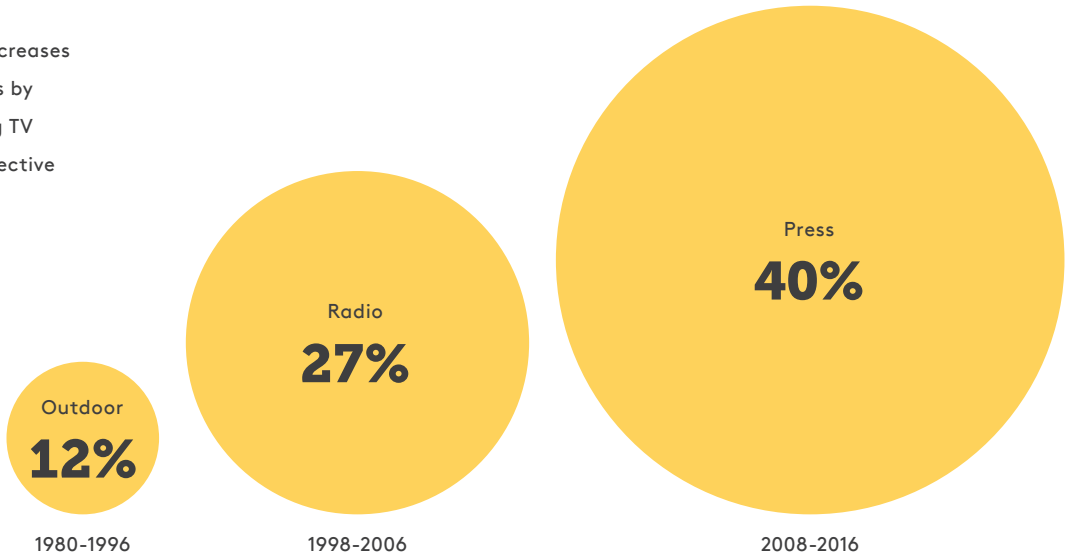
Effect of adding medium
Increase in average no. VL business effects



... and has become more effective over time

% increase in avg. no. VL business effects from adding TV

Adding TV increases effectiveness by 40%, making TV the most effective medium

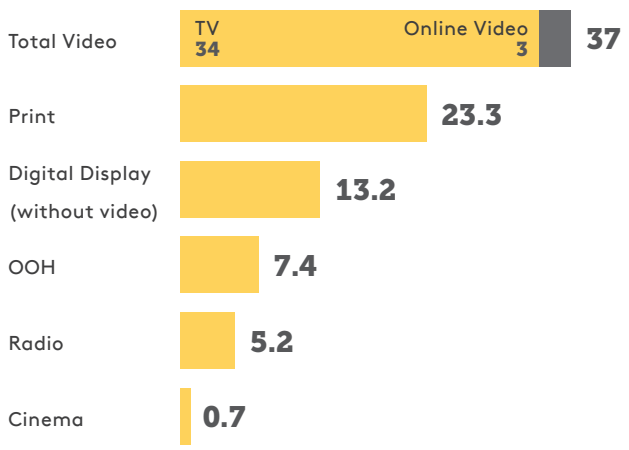


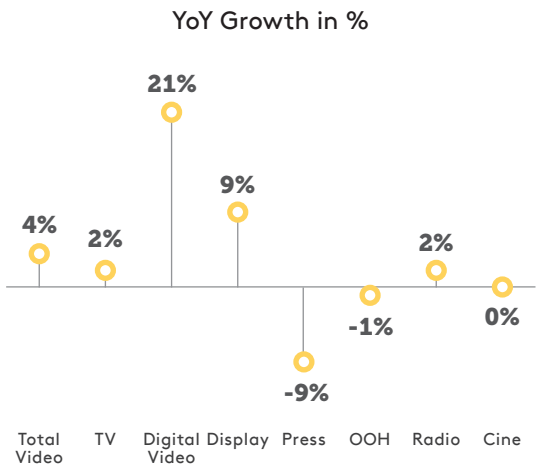
Source: Marketing Effectiveness in the Digital Era, 2016, Binet & Field / IPA Base: all IPA cases

Focus.

Facts & Figures
About European Online Ad Spend

Net European AdSpend 2016 (in €Bn)

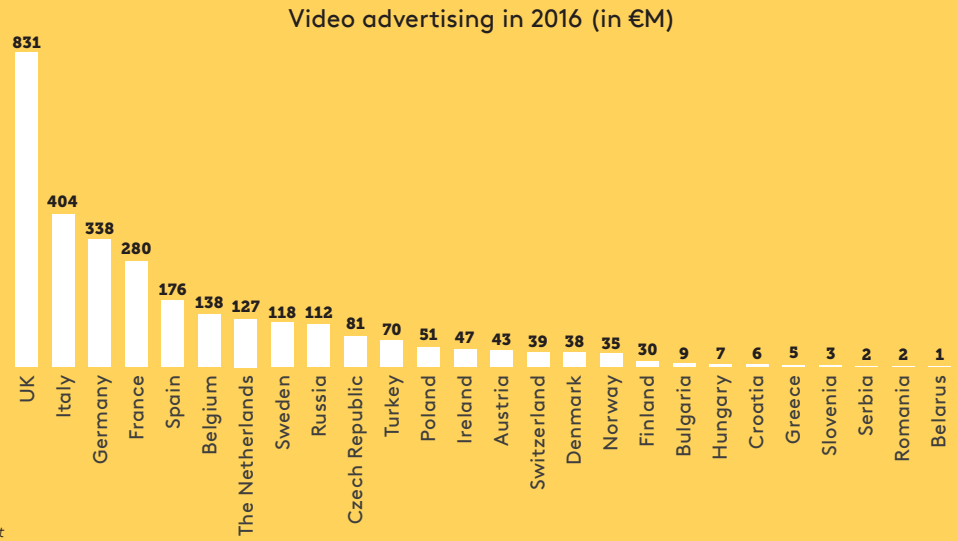




Source: IAB, IHS Markit, Adex Benchmark 2016. Estimated Net on 27 Markets

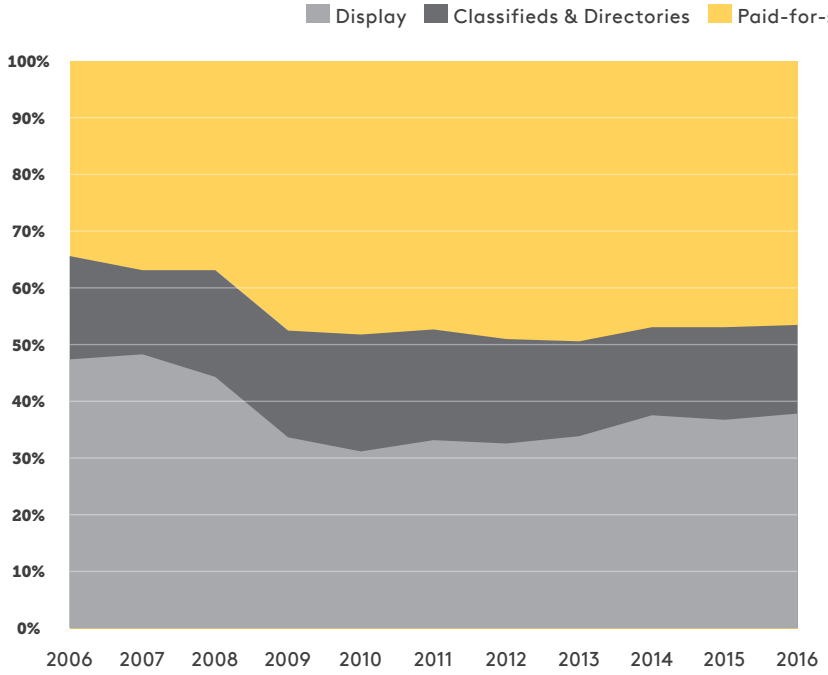
Mature markets were the major contributors to the European video ad spend, but highest growth came from the emerging markets

- 24 markets reported data
- Value: €3 Bn
- Year-on-year growth of 24.4%
- Top 5 markets by value: UK, Italy, Germany, France and Spain
- Top 5 markets by growth: Slovenia, Serbia, Belarus, Ireland, Croatia



Source: IAB Europe and IHS Markit

Format shares of online ad spend (%)



Europe

- Display was the only format in 2016 to gain share, with a small increase from 36.9% to 38.0%. For display to see a substantial increase, the European market needs to see online video play a bigger role.
- The contradiction of search share has stabilised over the last 3 years, floating around 46.0%
- While display and search have eaten into the classifieds and directories share, it has held its share base above 15.0% over the last 5 years.

Western Europe

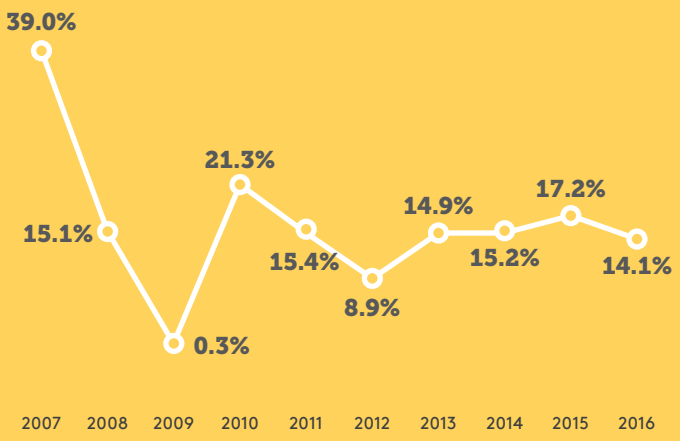
- Within Western Europe, the composition of format share resembles the total European market, which was a reflection of the market values of the mature markets within the region.
- Display decreased slightly from 38.0% to 37.8%
- Paid-for-search remained the same year over year.
- Classifieds and directories were strong and gained a small share from display.

Source: IAB Europe and IHS Markit

Display advertising year-on-year growth (%)

Display experiences the fastest growth amongst al the formats, up to 14.1% from 2015.

- Value: €16.2 Bn
- Accounts for 38.6% of all online advertising spend
- Year-on-year growth of 14.1%
- Top 5 markets by value: UK, Germany, France, Italy and Spain
- Top 5 markets by growth: Ireland, Slovenia, Romania, Slovakia and Bulgaria.



Les Experts

Club RTL, Belgium

Video Is Becoming Increasingly More Important To Children

Children have access to a wide range of different media options. This choice includes professionally produced and user-generated content, games and social media. The institute iconkids & youth regularly conducts media research into families on behalf of SUPER RTL and surveys what types of devices they have, how they're being used and what other activities children engage in during their spare time.

Brigitte Bayer
Senior Project Manager
Advertising Research
MEDIEN GRUPPE RTL DEUTSCHLAND

How do children spend their free time?

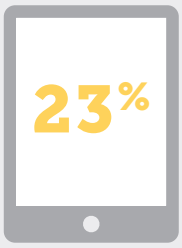
The use of mobile devices plays a minor role in children's spare time activities, dominated by traditional forms of play: alone or with friends, at home or outdoors.

Around 30% of 6- to 12-year-olds are brought to school by car. Same for travelling by bus or train: ample time to use a smartphone on the way.

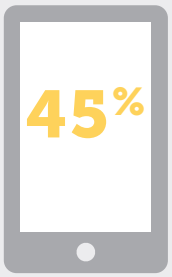
Devices used by children to go online

Desktop computers & notebooks

Tablets



Smartphones



75%
of 6 to 13-year-olds are on the internet at least once a week

47%
use it on a daily basis

Linear television dominates video consumption

TV is more important in the day-to-day lives of children than Internet use:

93%
of 6 to 9-year-olds and 95% of 10 to 13-year-olds watch traditional, linear television several times a week

26%
of 6 to 9-year-olds and

61%
of 10 to 13-year-olds watch videos on the Internet.

Even considering consumption across all screens, traditional TV content convinces the most:

89%
of 6 to 9-year-olds and

94%
of 10 to 13-year-olds watch TV programmes at the time they are broadcast

only 2%
of the 6 to 9-year-olds and

6%
of 10 to 13-year-olds watch shows via fee-based streaming services.

Variety of choice leads to additional use

Consumption of video content has risen year after year on nearly all platforms without substitution taking place. Linear TV is primarily used for relaxation, whereas the mood state associated with YouTube, for example, is characterised primarily by activity.

87%
of children use traditional TV on any given day...

YouTube

17%
...vs 17% for YouTube and other Internet video sources

Dragons
Super RTL, Germany

Virtual Nannies, Apps & Augmented Reality

In the last 25 years, the internet has profoundly changed our lives, but that's just the beginning. New technology already comes naturally to the next generation of digital and social media natives, and what's coming next will drastically change their behavior.

Rupert Schäfer
Managing Partner
THE NUNATAK GROUP

With new apps like PopJam, musical.ly, Toca Boca, a generation of parents that grew up with Panini-scrapbooks, Pac-Man and "Wetten, dass...?" currently looks on with astonishment at how their kids are spending their free time. And because the pace of innovation is exponentially increasing, it's becoming more important for parents to keep up. Mobile apps are just the tip of the iceberg. If artificial intelligence makes its way into children's playrooms, it might seem unnatural at first, but it could also open up new possibilities. Parents will have to mull over how digital nannies can support them and relieve some of the burden of parenting, especially on the topic of education. Though virtual nannies may not have the same emotional closeness to children as parents do, they could help foster the children's knowledge and teach media skills in a playful way. With the help of digital nannies, kids can make their first steps in the future's vast digital media landscape. And let's face it, the next generation is taking the internet, smartphones and virtual reality for granted – like eating bread with Nutella in the morning. >

If artificial intelligence makes its way into children's playrooms, it might seem unnatural at first, but it could also open up new possibilities.

The children's market is all about mobile

A survey of 2,700 parents in the United States, Canada and Great Britain – conducted by Ipsos and DHX Media – shows that the majority of children (61%) prefer mobile devices for watching different forms of content, and 40% of them watch content on their smartphone. That comes as no surprise: they've been tinkering with those devices since their early days of childhood.

As of now, Germany is trailing behind on that front. According to a representative survey by Iconkids & youth, 87% of mothers said that their children had been watching linear TV the previous day – YouTube and other web services were only named by 17%. And yet, smartphones and tablets are on the rise: 51% of 10- to 12-year olds already own a smartphone. This is an interesting development, considering Apple launched its first iPhone only ten years ago. The tablet is taking off with the younger audiences as well: 54% of kids own one, a 13% boost compared to last year. Many companies have already adapted to the new user behavior and are offering an exclusively mobile ecosystem. For example, the tremendously successful karaoke-app from China, musical.ly, with around 200 million registered users worldwide, is only accessible on the smartphone and tablet. The Mini Playback-Show 4.0 is also outrageously popular in Germany, especially with a very young audience. Around 19 million fans follow the videos of the 14-year-old twins, Lisa and Lena. Last year, the duo was awarded the Otto by *Bravo* magazine, proving that these devices have reached the mainstream. It also serves as an important cue for the advertising industry and its customers who naturally see a lot of potential in the market.

Another example of a mobile-only approach is the British mobile app, PopJam – a kind of safe Instagram for teens, already used by 30% of all 8- to 12-year olds. Similar to its big role models like Instagram and Facebook, PopJam lets children share pictures and stickers, follow channels and generate followers in a safe space. Its success in the UK sparked a launch in the US this year.

These apps and networks are increasingly becoming a challenge for traditional broadcasters, particularly because more and more video content is being shared on those platforms, and kids today are more accustomed to a digital, on-demand service than linear television. For instance, the app Toca Boca connects thousands of original videos with online games and information for parents.

Children usage of mobile devices and TV

61%
of children prefer mobile devices for watching content.

40%
of children watch content on their smartphone.

87%
of mothers said that their children had been watching linear TV the previous day – 17% for YouTube and other web services.

54%
of kids own a tablet, +13% vs last year.

The internet of things is changing the way we play, consume and learn

The digital revolution sweeping through our children's rooms will gain much more ground in the future. Virtual reality, augmented reality and the Internet of Things are all speeding up the process. Forecasts expect 50 million connected devices in the mix by 2020, and I'm not only talking about thermostats and cars. Even toys and games will become digitally connected, interacting with their users through an app which will gather and analyze lots of data. What's the result? The way children play will drastically change. Pokemon Go – a kind of scavenger hunt 2.0 – was only the beginning. The emerging technologies will also alter the way we learn; new devices can quickly and easily customize content to be precisely in tune with the user's needs. Microsoft already lets us position information in rooms via VR glasses, no matter where we are. Another example is Cognitoy, which is no more than a simple toy dinosaur at first glance. But if you connect it to the internet, it can answer almost any question, like a children's version of Wikipedia. Considering the sorts of questions children ask, it might be even better than their parents.

Artificial intelligence is moving into children's rooms

Voice control might be breaking one of the last barriers into the virtual world. It allows us to consume and interact with media without having to read, write or type. The smart speaker, Amazon Echo, connects to Amazon via voice control. On 8 August, Google has introduced its rival product – Google Home – in Germany. Mattel recently launched, among other products, Aristotle, Baby's First Voice Assistant. Said to be an "Amazon Echo that understands your kids too," the baby phone films your child and sends updates to your phone. It recognizes the child's speech patterns, puts on his or her favorite tunes and adjusts the light in their room. Another perk for parents is that Aristotle notices when the child needs a nappy change. These are only some of the ways that parents can benefit directly from the digital revolution.

CogniToys,
The Educational
Toy Dinosaur

Check out the infographics by Brigitte Bayer from IP Deutschland on pages 70-71 for more information on children's screen usage.

Everyday Heroes For Kids

How Brands Become – and Stay – Relevant

Development is far quicker during childhood than at any other stage of life. Children are constantly acquiring new skills, and the way they perceive their physical and social environment is always changing. Whatever a four-year-old's world revolves around today may well be completely forgotten in a few days' time.

Cornelia Krebs
Head of Advertising Research
MEDIEN GRUPPE RTL DEUTSCHLAND

Childhood means change. This presents particular challenges to brands targeting kids in their marketing and communication. Children's needs and their developmental level have to be taken into account, and the brand should ideally retain long-term relevance. The key to achieving this was demonstrated in a number of presentations at this year's Kinderwelten conference in Cologne, Germany.

The concept m and iconkids & youth institutions presented the results of various studies which examined the subject from different perspectives. The findings of iconkids & youth are based on regular quantitative investigations in the target group of children. Children and their parents are interviewed on subjects including leisure activities, media usage and consumption. Concept m was commissioned by IP Deutschland with the task of finding out how brands establish themselves in the awareness of children and what the role of TV ads may be in the process.

Children between 5 and 11 years of age were encouraged to play in a natural setting in association with a brand. >

Brands have an ideal audience children, who are naturally interested in novelty.

Inspector Gadget
SUPER RTL, Germany

Woozle Goozle
SUPER RTL,
Germany

An advertiser who only communicates their product's benefits without offering creative stimuli won't be up to par in the imaginative world of the child.

Depending on their character, they painted and did crafts with the experiment leader, while other kids reenacted brand experiences themselves or with toy figures. This atmosphere allowed the kids to express themselves in a way they might not have been able to articulate verbally. This combination of quantitative and qualitative results gave rise to specific advice for brand communication.

Brands have an ideal audience in children, who are naturally interested in novelty.

What's more, they get to know a lot of products through brand names in their daily lives. The brand (for instance, Nutella) is then synonymous with the product category (hazelnut chocolate spread), and it's often only many years later that children become aware of the actual category behind the product. But even leading brands that make it to pole position because of their prevalence in very early childhood development are not guaranteed long-lasting relevance.

Brands have to adapt their storytelling to fulfill kids' imagination and safety needs.

Triggering the imagination

Children's ideas about brands and what they offer change according to their stage of development. The preschool period, for example, is distinguished by the very gradual cut off of the child's symbiotic relationship with its mother. The child very carefully begins to assert its independence, which can quickly lead to overwhelming feelings. Brands can adapt to this tension by gearing their communication towards freedom and safe spaces for retreat. A child's imagination is boundless; it only needs the smallest amount of stimulus to register brand communication and it only takes short stories that convey to children the qualities of the brand characters to turn brands into heroes. But the reverse is true as well: an advertiser who only communicates their product's benefits without offering creative stimuli won't be up to par in the imaginative world of the child. They'll then also be faced with an uphill struggle in the real world.

"This is for you"

The art of effective children's advertising is to maintain the balance between creative impulses and quality communication of the product. Even in advertising directed at preschool children, the perks of the product should be clear. It goes without saying that kids need to understand that they are the target group. Certain key signals – such as colours, typography or the features of the characters in the ad – can be used to define the user category. Preschool kids don't make strategic use of brands. The connection with a brand arises primarily out of what it offers the child on an emotional level; whether the product is attractive to the child or if he or she has any interest in using it.

Even primary school children think strategically

At primary (elementary) school age, brand functions change. The egocentric perspective of a preschool child, "me and the brand", gives way ›

To be sure your brand will still be used by the next generation, your ads need to be continuously present with attractive brand stories that are relevant to the times.

The Adventures of Puss in Boots
SUPER RTL, Germany

to a sociocentric one "what can the brand offer me in my social environment?". After all, when you meet with friends in the playground, it starts to matter what you own and consume. Brands become accessories.

In this age group, the primary function of brands is an integrative one. Kids want what their friends have. It's important for children to join forces with friends to occupy shared terrain. This is another step towards breaking away from mum and dad – especially if mum and dad don't share the same fascination with the current trends. At secondary (high) school, the focus increasingly shifts to the differentiation function of brands.

Secondary-age kids are now well on their way to expressing themselves. While they still basically want the same things as everyone else, they want them with a personal touch. In every generation, brands offer typical products with an integrative function but also a design that provides scope for distinction.

The comfort of the cocoon

Whether preschoolers or teens, children always have periods of yearning for refuge and support. In this safe cocoon, they recharge their batteries in order to experience new discoveries. Products that are advertised as family friendly, or used in a family setting, give rise to a feeling of dependable security, emotional closeness and care.

Experts for target sub-groups and lifelong favourite brands

Depending on the sector and product segment, it can be useful either to address a target sub-group defined by age, or to position the brand as suitable for children of all ages. Favourite brands that focus on target sub-groups stay relevant as long as they continuously re-evaluate the sub-group's specific needs. This tactic helps them win over future generations.

Favourite brands with a broad target group, on the other hand, should focus on the product benefits, and avoid design codes which suggest over-identification with too narrow an age category. This reduces the risk that the product will lose its cool factor as the children age.

One thing is true for both types of brands: continuity is important. If brands stop advertising for long periods of time because they assume they've made their mark forever, they'll be booted out by the competition. If you want to be sure that your brand will still be used by the next generation, your ads need to be continuously present with attractive brand stories that are relevant to the times.

TV ads build bridges between brands and the imagination

TV ads have a central role in the communication of successful brands: they are the link between the product, the personal environment and the child's imagination. In an ideal world, TV ads would use compelling storytelling to communicate not just the relevance of the product in kids' daily lives, but also a sense of what the brand stands for. Brands should technically have an easy ride in this case, as they can build on the imaginative way children think.

A brand story suitable for children needs time in TV ads to develop its message. Although overly quick cuts may have a dynamic effect, children are overloaded by them, and the character of the brand falls by the wayside. It's a better idea to rely on short, concise stories about the qualities of the brand heroes. With sharp storytelling, brands have the best chance of staying present, even in the absence of direct advertising contact.

The Kids Are Alright:
Millennial TV Viewing Trends
Might Be Getting Better

Deloitte predicts that traditional TV viewing[1] by 18- to 24-year olds (the youngest sub-group of the millennial generation, also known as Gen Y) will decline by 5-10% in the US, Canada and the UK in 2018 compared to a year earlier. In each country, that would be a rate of decline lower than a few years ago.

Duncan Stewart
Director of Research
Deloitte.

Deloitte further predicts that it is probable that the trend for the next few years will be ever more modest annual drops. Why? Over the last few years, young people were pulled away from traditional TV by the astonishing growth in digital competition. In the last five years, young people have been lured by the siren songs of alternatives such as smartphones, computers, social media, streaming platforms like YouTube, SVOD systems like Netflix, and video piracy, from either downloading or more increasingly, streaming. All of those distractions are piling up and showing stagnating annual usage, meaning that the erosion of TV minutes won't stop, but will likely slow down.

Overall, TV viewing for the total population has been resilient. For example, in 2017, TV daily minutes in the US are down less than 2%. But it was a common assumption that these average viewing numbers were mainly supported by a rising audience in elderly people, while younger viewers were abandoning TV at an ever increasing rate.

Figure 1 is a chart showing the annual changes in traditional TV viewing for similar young age groups in

The erosion of TV minutes won't stop, but will likely slow down.

the US, UK and Canada from 2011 to the present. As far as I know, there has never been a comprehensive graph of the three largest (mainly) English speaking markets before, focused on young viewers, and over such a long period.

The first conclusion I would draw looking at Figure 1 is that traditional TV viewing by 18- to 24-year olds appears to be in structural decline. This is hardly news, of course, but seeing the trends over six plus years and across three countries reinforces that message. Second, the annual declines tend to range from about -5% to about -10%. Of the seventy or so individual data points, over 80% fall into that range. As anyone in the print newspaper business can tell you, single digit declines are MUCH preferable to double digit declines! Finally, the trend does not seem to be accelerating: there were some declines of over 15% in the UK and nearly 20% in the US, but they are outliers. UK declines look stable, and in both Canada and the US there seems to be a moderating trend in annual drops in TV viewing by this youngest age group. That could change, but the worst seems to be behind us. ➤

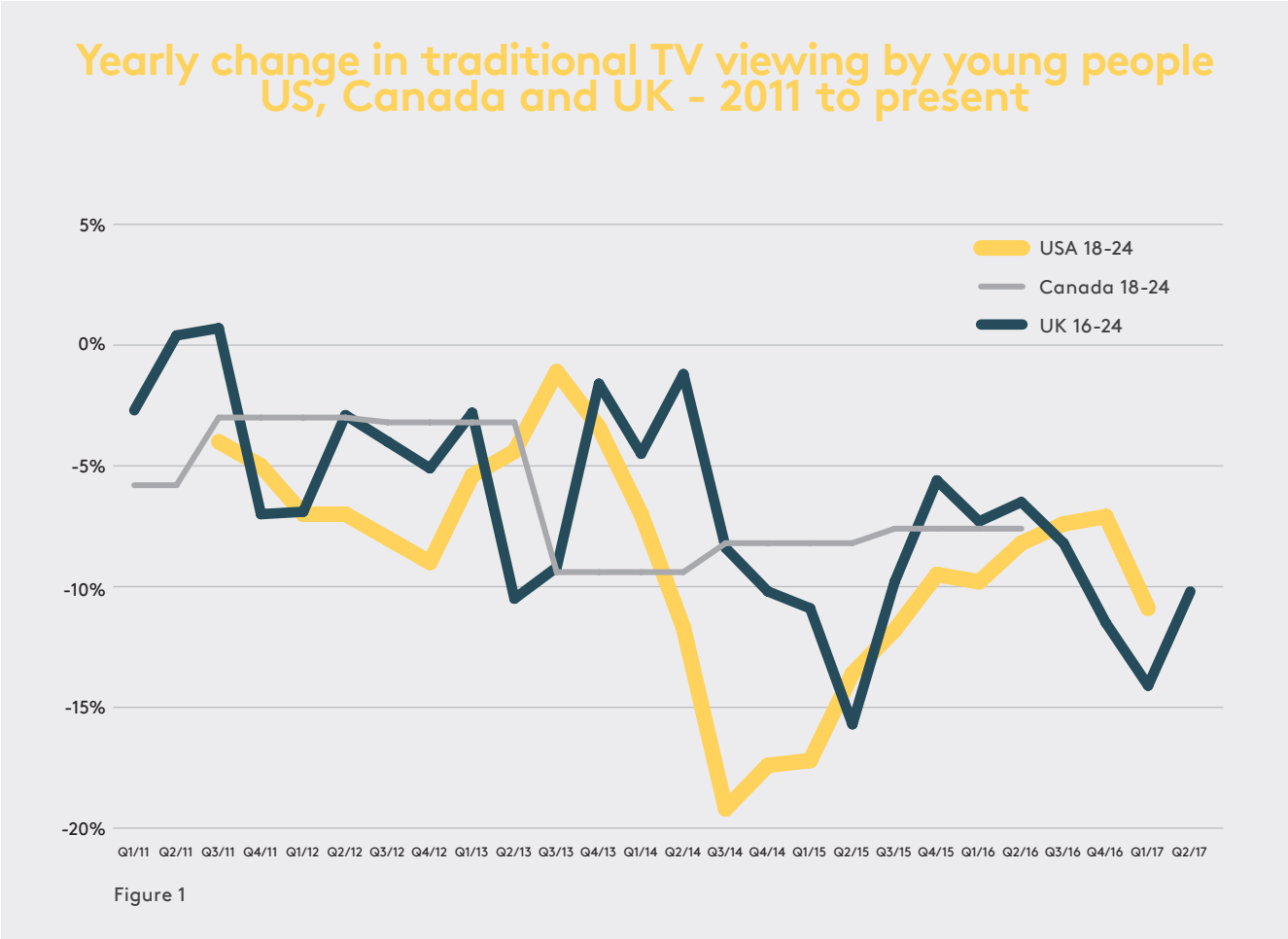


Figure 1

It seems likely that, for the rest of 2017, we'll see viewing declines of closer to -10% than -5% in the US and the UK. Both the US Presidential election and Brexit/UK election had a positive effect on TV news viewing by young people, and therefore the year-by-year comparisons will likely suffer for the rest of 2017 now that these major TV news events are over. But it's possible that we'll see smaller declines in 2018.

Why?

I think that recent declines in traditional TV viewing by 18- to 24-year olds were largely caused by tech and media trends that acted as competitors or substitutes for traditional TV: smartphones, streaming video on demand services, social media, piracy and ad-supported online video. (Some might wonder why I don't mention video games, but those have appealed to young people and competed with television for decades. They did not spike in the 2014/2015 time period.) Those all existed before 2013, but entered the steep part of adoption and usage curves, and acted as a "perfect storm" that took 18-24 year olds' eyeballs away from TV sets. None of them are expected to become less important going forwards, but neither are they capable of becoming materially more significant threats than they are already. At some level, the worst may be past!

1. **Young people are more likely to have a smartphone.** Smartphone ownership by 18- to 24-year olds in the US was only 55% in 2012 and was 94% in 2016, the same number in 2015. Not only are smartphones nearly ubiquitous, the penetration is not growing[3].

2. Smartphones have much bigger screens, which are better for using as a TV alternative. In September 2014, Americans owned only 60 million phones with screens over 4.5" and 120 million phones smaller than that. By December 2016 the smaller phone category had gone down to about 40 million, while there were now about 160 million larger phones[4]. Given new product launches, we may see over half of all new phones have screens over 5.5".

3. More young people have SVOD services such as Netflix, and use them more each day. Only 28% of US millennials had Netflix in 2012, a rate that nearly doubled to 50% by 2015. Tacking on to the growth in Amazon Prime, Hulu and HBO Go, SVOD penetration in this demographic is now likely over 75%. Daily usage for Netflix was about 1.2 hours per subscriber per day in 2012, and 1.8 hours in 2017[5].

4. Young people are consuming more streaming video from services such as YouTube. Streaming video hours weekly for US millennials rose from 1.6 hours in Q4 of 2013 to 5.7 hours in the same quarter of 2015, more than tripling in two years[6].

5. Social media apps are ubiquitous and time consuming. As of December 2016, over 60% of US 18- to 34-year olds were on Snapchat, over 75% were on Instagram, and 95% were on Facebook. Daily use of each platform averaged 14 minutes, 13 minutes and over 30 minutes, respectively – meaning between the three, total daily social media approaches an hour[7]. Snapchat was used by 38% of 18- to 24-year olds in the US in December of 2013, and 78% by December of 2016[8].

6. Peak piracy? Although millennials are now less likely to download, they are still pirating video content; 42% of 18-24 year olds in 2016 said they illegally streamed video on their desktop or laptop, and 41% said they were streaming illegally on their mobile devices[9].

Cf. the article by Florent Carême from Eurodata TV Worldwide that gives an interesting insight on the share of non-measured viewing by younger target groups and its effect on the global viewing figures.

Details on interpreting the chart:

1. I have chosen to use line thickness as a rough indicator of population size, with the US the thickest and Canada the thinnest: the line width is not exactly proportional to population size, but close. In the period measured there were about 25-27 million 18-24 year olds in the US, about 7 million 16-24 year olds in the UK, and over 3 million 18-24 year olds in Canada.
2. Data in each country is sourced from the traditional leader in TV viewing measurement: Nielsen in the US, BARB in the UK, and Numeris in Canada.
3. There are multiple important differences in measurement methodologies used by the three data providers. Far too many to enumerate, but they almost certainly matter.
4. The age break used in the US and Canada is 18-24 year olds while the UK age break is 16-24.
5. The Canadian data is annual instead of quarterly, and is not as current, ending in the 2015/2016 broadcast year. Equally, we have Q2 2017 data for the UK, while the matching US data will be published in October. >

Finally, the trend does not seem to be accelerating: there were some declines of over 15% in the UK and nearly 20% in the US, but they are outliers. ... The worst seems to be behind us.

6. There are important country differences. Just a few examples:

a. BBC iPlayer is a significant factor in the UK which appeals to younger viewers. There's no real equivalent in the North American markets.

b. In Canada, TV habits for English-speaking and French-speaking viewers (about 22% of the population) are sharply different, with French-speakers watching more traditional TV each day, and annual declines being lower. The Netflix take rate in French Canada is less than half of that in English Canada.

c. And in the US market, there are even larger differences within the population. The average 18- to 24-year old watches about 151 minutes of live and time-shifted TV per day in Q4 2016, while the average African American of the same age watches 246 minutes (63% more than the composite average) and the average Asian American watches only 83 daily minutes (45% less than the composite).

7. Although younger viewers are moving some of their daily video minutes away from traditional TV comedy and drama, other categories, such as sports viewing, has remained relatively strong. Therefore, sports viewing now makes up an increasing percentage of total traditional TV viewing for young people. That's great news for sports and traditional TV, as it's watched live and with strong ad loads and subscription fees. But, it also means that analysing annual trends is more complicated, volatile and country specific.

a. Whether it's the Football World Cup or Champions League, a strong or weak performance by any of the UK teams would have a large positive or negative effect on viewing in the UK market. Although some in North America watch that kind of football, the effect is much smaller.

b. Meanwhile, NFL football is the dominant TV sport in the US. A period of weak ratings (as was seen in the first half of the 2016/2017 season) would have a material impact on TV viewing by young people. Assuming they watch an average of 120 minutes of TV per day in that fall football quarter, even a 6 minute decline in NFL viewing would mean a 5% drop!

c. In Canada, neither kind of football is as important for traditional TV. Instead it's NHL ice hockey. A playoff year which saw no Canadian-based teams perform well would literally see a 50% drop in audiences compared to a year where several Canadian teams (especially in larger markets) made it through several rounds. 5-10 minutes per day impact for 18- to 24-year olds would be a conservative estimate.

8. Equally, although Figure 1 shows stable single digit annual declines, data from other countries is not so positive. Recent data from Denmark, Norway, and Sweden for Q3 of 2016 show that TV viewing by 15- to 24-year olds is not declining at modest single digit rates, but 29, 21 and 23% respectively. The data is over a measurement period of one year, so it will be necessary to watch this trend over a longer time period to see if this decline is steady. Though this seems improbable, time will tell.

[1]This refers to live and time-shifted viewing of TV content on TV sets, connected TV devices, computers and smartphones. It does not include tablet viewing, and does not include SVOD services such as Netflix or online video content such as YouTube.
[2]http://www.smartbrief.com/s/2017/03/nielsen-millennial-viewership-rise-across-cable-news-networks
[3]comScore US Cross Platform Future in Focus 2017, page 24
[4]comScore US Cross Platform Future in Focus 2017, page 28
[5]Netflix quarterly reports.
[6]http://www.jayshemenski.com/blog/will-social-media-become-the-new-tv-for-brands
[7]comScore US Cross Platform Future in Focus 2017, page 32
[8]comScore US Cross Platform Future in Focus 2017, page 35
[9]http://www.broadcastingcable.com/news/news-articles/study-millennial-piracy-trends-shifting/159771
[10]http://www.newgeography.com/content/00269-number-18-24-year-olds-united-states-2000-2050
[11]http://www.statcan.gc.ca/tables-tableaux/sum-som/l01/cst01/demo10a-eng.htm
[12]Special thanks to Toby Syfret at Enders Research for the UK data, and to Lisa Eaton and Numeris for Canadian data. All US data is pulled from the various Nielsen Cross Platform and Total Audience reports over the years by me. I of course take all responsibility for the presentation and interpretation of Toby's and Lisa's data!

Solution Trends.

With the new Total Video world we live in, the broadcasting industry has harmonised mass media and customised solutions for advertisers. TV's unique reach works more effectively with digital ad possibilities that most broadcasters now offer: new video marketplace opportunities and innovative solutions (behavioural targeting, re-targeting, addressable TV, influence marketing, qualified and safe data).

Christophe Loisel
Deputy General Manager
RTL/AdConnect

Krane Jeffery
Head of Digital Solutions
RTL/AdConnect

Combining the power of linear reach with digital interactivity in customer relationships has a positive short-term effect on sales and long-term effect on the customer's brand experience.

- Bianca Stockreiter from TrendOne tackles how younger generations today are 'always on' in terms of their digital connectivity. Knowing how to credibly place a brand in the digital environments so that it gets people talking is vital.
- Marc Cain's experience testifies how you can rapidly "popularise" your brand and engage the young generation.
- The Haier experience on the German channel Vox is a fascinating case that shows how a TV brand partnership and licensing for a TV show can have a strong impact on sales and in-store activities.
- The new PayPal TV experience on Antena 3 in Spain breaks down how brands can deliver a clear message in a creative way, while delivering a strong national reach and boosting digital conversations.
- The Lastminute customer experience on ITV in the UK and M6 in France is an insightful case, showing how memorable TV content is the key for compelling "storytelling". It covers the wide range of Total Video advertising solutions that broadcasters can tap into to bring their message home.

TV remains the ultimate platform for making brands famous. This is not at the expense of innovation, with a plethora of "beyond the spot" solutions available to brands and marketers. In an interview with smartclip, we get an in-depth scope on the technical developments in addressable TV. Data is undoubtedly essential for tweaking content to achieve results with the biggest impact. However, data and digital channels should never be a substitute for bold and brilliant ideas, which TV itself is famous for. Thorsten Schutte-Gravelaar explains how ATV harnesses these new data sets and real-time opportunities, to broaden the timeless value of the traditional TV experience. X

El Hormiguero

Antena 3, Spain

The Rise Of Connected TV in Europe

Audiences across Europe are watching more TV than ever. New technology has created new methods of TV consumption and changed the way viewers can interact with their favourite TV content. The development of over-the-top (OTT), the delivery of TV content through an open internet connection, has allowed audiences to increase their viewing due to the consumer-friendly flexibility OTT offers.

Leon Siotis
Managing Director
UK & Southern Europe
SPOTX

Audiences across Europe are watching more TV than ever. New technology has created new methods of TV consumption and changed the way viewers can interact with their favourite TV content. The development of over-the-top (OTT), the delivery of TV content through an open internet connection, has allowed audiences to increase their viewing due to the consumer-friendly flexibility OTT offers.

The habitual shift in the way audiences view TV content has opened up opportunities for global broadcasters. Viewers can now watch content after the initial broadcast time and across multiple devices which has enabled a new TV ecosystem, a 'Total Video' universe. Major broadcasters are recognising the opportunities of offering their premium content to viewers in a more flexible way that enables them to generate more data and better targeting while still maintaining the premium big screen experience.

Viewers can now watch content after the initial broadcast time and across multiple devices which has enabled a new TV ecosystem, a 'Total Video' universe.

STV, the leading broadcaster in Scotland, is embracing the new ecosystem. The STV Player allows viewers to watch their favourite TV programmes such as World Cup Football or *The X Factor* live and on catch-up, free of charge within STV's licence areas. The broadcaster was the first in the UK to introduce dynamic ad insertion (DAI) to live channels in 2014, with Yospace. Since then STV has developed a cutting-edge data strategy, allowing their inventory to be monetised programmatically and is a perfect example of a broadcaster embracing the new TV ecosystem opportunities.

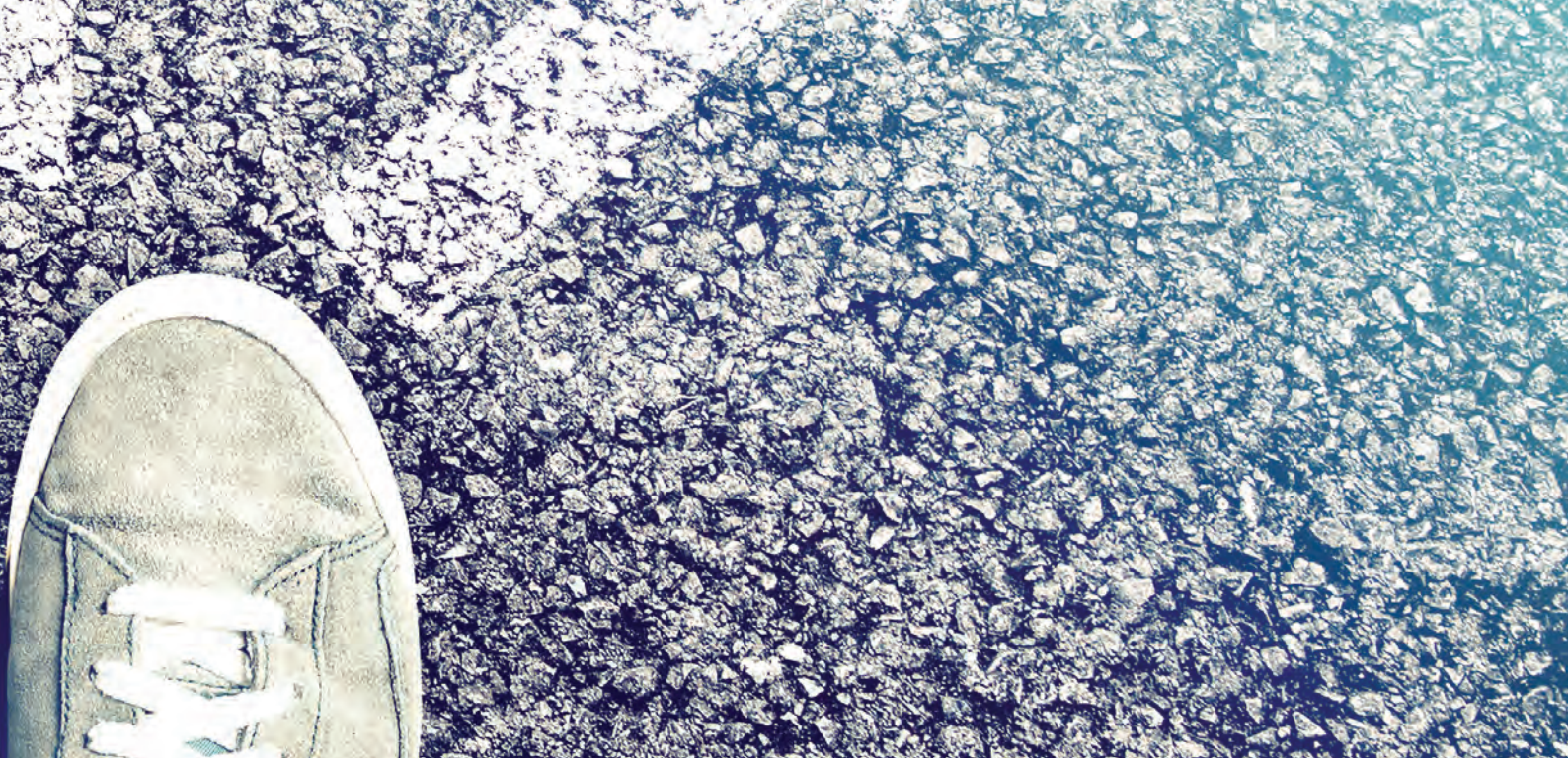
Interest in the development of connected TV is being driven by European advertisers who see enormous value in reaching consumers on the big screen in a brand safe environment. Adoption of OTT varies market by market in Europe and is dependent on several key variables such as connected TV penetration in the market, consumer awareness, broadband speed and the availability of free-to-air TV. In some countries, the use of connected devices is more of an urban phenomenon with the opportunity for development in rural areas.

In Germany, where TV remains hugely popular, there is a wealth of options for subscription-based VOD services with good competition amongst providers driving the uptake of OTT. There is room for further growth in the market, and as audiences are becoming more aware of how they can watch content through a streaming service, gaming console or smart TV, broadcasters' investments into the connected TV ecosystem will increase at a steady pace.

Like Germany, Spain has excellent broadband penetration giving an optimistic outlook for the future of OTT in the region and audiences are well informed about the connected TV options available to them. The strong demand from advertisers and their agencies for more connected TV inventory outpaces the supply available at the moment. As the amount of local content in Spain that is available on OTT platforms grows, the Spanish market will see the new ecosystem flourish.

Like Spain, the success of OTT in France is dependent on more local content being produced. However, according to eMarketer, half of France's internet users will access streaming video services at least once a month this year. Advertisers and their agencies would like to see more of this inventory become integrated with programmatic infrastructure. France also benefits from advanced video measurement which was introduced into the market by Médiamétrie in 2016 but there is still room for more integrated 'total video' measurement across digital and TV. The predominance of IPTV does remain a barrier to full penetration of OTT but awareness amongst consumers is high which will put pressure on broadcasters to meet viewer expectations.

Italians love free-to-air live TV and smart TV, while broadband penetration is low, resulting in diminished motivation for broadcasters to invest in a new



connected TV ecosystem. Despite this, advertisers are showing a strong demand for connected TV advertising options in the region. If broadcasters and manufacturers can co-operate to protect and develop the TV environment in Italy, the level of OTT adoption will increase.

According to SNL Kagan, the UK has one of the highest levels of broadband penetration in Europe: 91% of UK households have fixed broadband connections, of which 91% are over 4Mbps (Akamai, State of the Internet Q4 2016) and, like the US and Germany, smart TVs are extremely popular. There is also widespread audience awareness of OTT options with a rising culture for watching TV across multiple devices and through catch up or streaming services. Broadcasters in the UK believe that investing in OTT should be a top priority for them over the next three years. Fast-paced adoption will be facilitated by the already well established programmatic video industry.

There is a clear opportunity for European broadcasters looking for incremental revenue from OTT. As audiences continue to enjoy television, albeit on demand and through a variety of connected devices, advertisers demand will continue to increase. Awareness amongst consumers for these options across Europe is generally high and it is now in the hands of the broadcasters to capitalise on the opportunities of the new 'total video' ecosystem.

91% of UK households have fixed broadband connections, of which 91% are over 4Mbps.

Marketing of Tomorrow
The Four Factors For Success

Jens Pöppelmann, IP Deutschland's Media Operation Director, examines the four factors for success in the marketing of the future.

Jens Pöppelmann
Media Operation Director

Data

Quantity with quality

Technology and data go hand in hand. If technology is the engine, data is the fuel that drives the modern consumer, the media and the advertising world. There can no longer be any doubt that today – and to an even greater extent in the future – data is a key factor for success across all industries. The keyword here is "big data". To see where the true potential lies for marketing and advertising, however, we need to take a closer look.

Using data intelligently

Which data is relevant for brand communication? Who has control over it? How does big data become smart data? That is, how can data be processed to be useful in practice? The challenges are by no means trivial. The fact that even more types and greater volumes of data can be captured is both a blessing and a curse. While increasingly varied and useful insight can be gleaned from the flood of information, the data situation is in many cases still very heterogeneous in terms of origin and methodology. Reliable standards that would offer genuine comparability and meaningfulness have not yet become established in this dynamic market.

Reliable standards that would offer genuine comparability and meaningfulness have not yet become established in this dynamic market.

Data as a contact filter

In the media sector, the primary use of targeted data is in qualifying contacts. The potential benefits range from optimised targeting of the audience via improved targeting mechanisms and optimised control of the screen-independent contact rate, to so-called data creativity. In other words, the user-specific dynamic adaptation of advertising material and play-out using a variety of different sources of data, such as genre, current location, associated weather reports, information on search and purchasing behaviour, etc.

All of these benefits contribute to increasing budget efficiency in the long term, be it by reducing media waste, fine-tuning the campaign control, obtaining more meaningful KPIs for ex-post campaign analysis, or through achieving a better understanding of both the individual customer and the customer journey in general.

The rarer, the more valuable

Honing in on the target group is probably the most relevant area for data-driven optimisation, and it can be grouped into four categories, each of which relies on different information: technical and predictive behavioural targeting, re-targeting and the use of so-called user-declared data. >

These four categories differ in the type, quantity and availability of the data gathered, and – regardless of the volume – in how the quality of the data in question can influence the effect of a campaign. Basically, the rarer, more specific and exclusive the data, the more valuable it is.

/ In order to differentiate a brand from the competition, to bring it to life and plant it firmly in people's memories, you need integrated solutions that span across all channels.

Acquire, bundle and process data sources

Various suppliers have, as a consequence of their history, access to a variety of different data points that they can exploit. Some are striving to strategically extend their data expertise and sovereignty in order to increase their own relevance in the market, because linking different types of data creates added value.

Valuable panel data both in terms of quality and quantity

Number of panellists

- Quality assured
- Incentivised and valid
- Panel data superior to profile data

Orchestration

Creativity on all platforms

In order to differentiate a brand from the competition, to bring it to life and plant it firmly in people's memories, you need integrated solutions that span across all channels. Mutually complementary measures covering TV and the digital domain are now standard. It's important to adapt the storytelling mechanisms to the scenario of the channel in question. This makes creativity, storytelling and orchestration more important than ever. Forms of advertising, such as product placement, branded entertainment and content marketing have become firmly established in television. It's becoming apparent that brands and products are not only more tightly associated with TV shows, but are even protagonists in their own right, generating enormous advertising impact in the process.

Integrated solutions across all channels

If a brand is seen as credible, sympathetic and relevant – whether as part of a large-scale, high-reach comprehensive campaign or a custom split-screen during a show – content integration will continue to grow in importance and rapidly become the norm. Particularly in the digital domain, such as addressable TV for example, the number of options are growing daily. It's an important step for IP Deutschland to be involved in driving such future trends.

Greater impact – from tailor-made to off-the-peg

The demands being made of media providers are changing rapidly: attractive environments and competitive sales models are an essential basic requirement, of course. But there is an increasing tendency for expertise in areas outside the traditional core activities to explain the performance, cost-effectiveness, management and transparency to advertisers when assessing how attractive a product is. Only those who identify trends early enough, take a holistic view of the associated thematic fields and flexibly adapt to new developments will enjoy success in the long-term. For IP Deutschland, this means not just relying on its own solid market position, but having a vision focused on key areas, and a corporate culture that embraces constant change.

Interview.

StyleHaul's Data Ecosystem

StyleHaul, a contemporary marketing influencer agency and home to the largest global style community of content creators, develops multi-platform content strategies for brands, such as CoverGirl, Walgreens, Procter&Gamble, Johnson&Johnson and Sephora, through highly targeted campaigns designed for the 18 to 34-year-old female demographic.

Stephanie Horbaczewski
Founder & CEO

STYLEHAUL

Could you tell us more about StyleHaul's creation and purpose?

I'd read an article in FastCompany predicting that brands were going to need to build social networks to compete in the future. I decided that I wanted to be in the digital space. I met Allen and Aaron DeBevoise through the team that founded Machinima and they agreed to co-found StyleHaul with me.
Our vision was to translate the fashion and beauty editorial space into digital and social content. It's now evolved into a vast network of more than 20,000 content creators across 86 countries.

You're calling yourself a "marketing influencer agency" and not an MCN anymore. Are you changing your strategy?

To me, the MCN movement as you and I know it has gone in different directions. The whole space evolved to an MPN – a multi-platform network – so it's more of an industry movement. What links these businesses is that we've moved across the multi-platform. ➤

/ YouTube is still the most popular platform for creating and consuming content.

Zoella

We focus on the conversation, and what we can learn across platforms. For example, right now we're looking at the fact that YouTube has become more of a consumption platform than a creator platform. We're seeing trends completely changing. Facebook is more for consuming, Instagram is more for creating, and YouTube is still for creating and consuming.

Can you describe your global market?

We've found that being global and doing multi-region and multi-language campaigns has been very successful. For one P&G brand, we were able to run a campaign simultaneously for 5 different markets across South East Asia using the same products and the same line, which was a new advantage for them.

Where does your data come from? How do you organise it?

We have our own proprietary product, Society, which collects data from many sources, such as YouTube CMS, authenticated video and social channels, public APIs, indexing and much more, to provide unique cross-platform insights and strategies. Essentially, the data comes from first-party authentication from all of our 20,000 creators across major four social platforms: YouTube, Instagram, Facebook, and Twitter. More specific data, such as sentiment analysis, comes from a variety of third parties that we work with.

Tell us about your technology called the "Eye".

Until now, we've only been able to analyse an Instagram campaign by who liked it, who shared it, who commented on it; the typical engagement behaviour. The Eye allows you to see anyone who saw the content and created their own content as a result, as well as micro-groups within that.

For example, we did a programme for a cosmetics products retailer, and by using the Eye, we found that there were hyper-passionate subgroups such as hair, which is only one small section of the products

they sell. We could tell who the leading voices were and what type of content they were passionate about in the hair group. When they were going to launch new hair products in their store, the company could be practical about their ad investment, and consequently more effective as they're targeting a very specific group of customers.

How do you select the creators?

We have a certain set of criteria and engagement metrics that our talents have to meet to be part of our network, so we can say to a brand that they're all relevant, vertical and within a certain engagement threshold (e.g. how many followers on Instagram, how many monthly viewers on YouTube).

Do advertisers always follow your recommendations on the YouTubers choice?

It's really brand dependent; some brands still come in with a set idea of who their creator should be, others are open to learning from the data. A couple of years ago, we created the Vlogorithm to help advertisers understand our data-driven recommendations for creators. It allowed them to gauge what was most important to them, such as the demographic reached by the creator, the creator's age, if they were a mom, etc. It scans all the data points that we store on creators – hundreds of millions of likes a day – and give advertisers a list ranking the positive communication about their brand.

What's the big difference between the Vlogorithm and the Eye?

The connection between the two of them is that they're both part of Society, which is the StyleHaul product that captures all of our campaigns and our data, but they're not the same.
The Vlogorithm is a tool to help advertisers choose the best creators for them. For example, one brand was really fond of a particular creator, and although I agreed with her, the products were only carried in one or two retailers at the time, and she indexes really highly with the competitive retailer. She wasn't the best choice because her audience would end up buying similar products from the competitive retailer. The Eye shows us everyone who saw the brand's content on Instagram, and who created content as result of that. Those are their most highly engaged users. From there, we can show advertisers how to use the data to re-target users and continue the relationship with them, such as encouraging them to purchase or sign-up.

What makes you unique on the market?

We're fashion, video and style, now we're female and male with the launch of Hauk, and we're a focused group of individuals who are passionate about those topics. More than 80% of our community makes household decisions.
In the land of MPNs, we're leading the way with data strategy and internal products, with tools like Society and the Eye, and our work with targeting, re-targeting and localised modeling. X

StyleHaul, a market leader

- 12.7 billion views on YouTube in the first half of 2017
- 3.2 billion likes & almost 50 million comments on Instagram
- A community of over 18,000 highly curated influencers across all social platforms

Facing GAFA Players, European Media Groups Form Data Alliances

RTL Deutschland, ProsiebenSat.1 and United Internet's log-in alliance

In Germany, RTL Deutschland, ProSiebenSat.1 and United Internet have recently formed a log-in alliance to provide a simple, secure solution that manages opt-ins for the use of internet services, while remaining transparent and compliant with data protection laws.

- Creation of a cross-sector, open standard in line with the new European data protection law
- After its launch, 45 million users will be able to log in to partner websites easily and securely
- Transparency and control over personal user data – open to additional partner companies.

Three of Germany's media and Internet companies – Mediengruppe RTL Deutschland GmbH, ProSiebenSat.1 Media SE and United Internet AG – have launched a log-in alliance. This consists of a cross-sector registration and log-in procedure for accessing internet services with single sign-on.

The partners are developing an open standard that lets customers use the same log-in credentials to access all the cross-sector internet services part of the initiative, instead of repeatedly entering different log-in details for each service.

In addition, users are able to exercise data sovereignty. Each user has access to a standardised privacy centre from their account provider, which facilitates transparency and control over their personal data. Users can manage their data, change their password and grant or revoke permissions, all from a single location.

Zalando SE will be the first partner to use the log-in solution. As of its launch in 2018, users will be able to log in to their single sign-on, not just to watch TV NOW from Mediengruppe RTL and the ProSieben live stream, but also to check emails on WEB.DE and GMX and to shop online at Zalando. With over 45 million unique users each month*, the project's scope is essential for its future success.

Thomas Ebeling, CEO of ProSiebenSat.1 Media SE, weighs in: "With our alliance, we're adding substantial value for the customer. At the same time, we're strengthening the German digital market by counterbalancing the US monopolies and unclear algorithms."

**Source: Working Group for Online Media Research [Arbeitsgemeinschaft Online-Forschung])*

With over 45 million unique users each month, the project's scope is essential for its future success.

Gravity, the French data alliance

Centre France La Montagne, Condé Nast, FNAC DARTY, *L'EQUIPE, La Dépêche, La Nouvelle République,* Lagardère Active, *Le Télégramme, Les Echos-Le Parisien, Marie-Claire,* M6, NextRadio TV, Perdriel, Prisma, Media, SFR, SoLocal and Sud-Ouest: a dozen French mediacompanies have combined forces to form a data alliance called Gravity. Bundling and marketing their data through an innovative platform, these media groups hope to become the third major player on the digital advertising market, competing with Google and Facebook.

Amaury Lelong
Managing Director
in charge of data,
programmatic, search &
social advertising

Solocal GROUP

What is Gravity?

Gravity is based on the conviction that putting together their assets, a group of French companies can create a common dynamic and push the digital advertising market one step further. Our commitment to strengthen our positions in the market relies on :

- A rich, diverse data offer in socio-demographic, socio-professional, interests, intentions, purchasing patterns, etc.
- And a powerful media offer that brings together a set of formats for the alliance groups' websites and apps.

What was the motivation behind creating this alliance and what's at stake regarding data today?

Gravity is an offensive initiative, not a defensive one. The alliance was created in a context in which companies, notably GAFAM, brought innovative advertising solutions to the market. These solutions rely mainly on daily reach, constant communication with the user, and the sheer power of the data collected about the users to maximise ad targeting. Gravity gets inspiration from it and positions itself accordingly. However, we're convinced that by pooling our

The world of digital advertising should question itself and evolve, to find a practical and effective place within the user experience.

media, data, and know-how – particularly our technological expertise – this alliance can reach a turning point for digital advertising in France and steer the market to a new direction.

What guarantees can you give to advertisers?

The key values we propose to bring to the market are:

- Media power – 44% daily reach among the French population, equivalent to 16 million French people. This gives us a very competitive position in the market, pitted against Google and Facebook, who have 70% of the daily reach.
- Media granularity – we have the ability to restrict very precisely the broadcasting environments.
- Power and diversity of the data – we deliver an extremely diverse targeting quality. Our data targets are based on socio-demographic characteristics, geolocation, interests, intentions, brand affinity and even purchasing behaviour. More than 10 billion characteristics of internet users or mobile users are updated every month within the alliance companies.
- Brand safety, the core of our offer – we provide qualitative advertising environments along with qualitative and mastered audiences.

Gravity is made up of different groups. How can the standardisation of data achieve consistent targeting?

Well, that's the big challenge! That's why this alliance wasn't so straight forward, and why the market waited a long time to go for it. First, we chose to use a trusted third party, Mediarithmics, to simplify our internal communication. They collect, process and standardise the data, according to certain criteria that all of our partners follow.
Moreover, the alliance will be equipped with a data science team, whose work will be to validate and optimize the data cross-over between companies.

How would you define your current development status in terms of partners?

With close to 50% daily reach, we believe the launch has been a success. We'll be revealing new alliance members in the coming weeks and I think that within a year, we'll have reached our ambitious target: to be at least on par with Google and Facebook.

Since the alliance is composed of both large groups and smaller partners, how is the distribution and compensation organised?

Dividing up the profits is very simple: each member brings in their own media, reach and data. We work with a dual automatic remuneration model that pays each member when his or her media or data is used, through a platform created by Mediarithmics. It's a win-win situation: the alliance will let companies break into markets that are out of reach today. So, Gravity is a way to build up a collective experience that we wouldn't be able to have individually.

What do you think about the new European Personal Data Regulation (GDPR)?

We are fully concerned by the coming evolutions in European regulation. More broadly, the effectiveness and relevance of advertising is paramount to us. The world of digital advertising should question itself and evolve, to find a practical and effective place within the user experience. Gravity is a way to make advertising more relevant and therefore more in tune with the user, by sharing data and having an efficient advertising capacity.

Is a log-in agency something you might consider in the future?

We know that the world of cookies is likely to more restrained in the future, so there's already some brainstorming about media logs. It's not our priority now, but it's one of the projects that in the works.

General Data Protection Regulation (GDPR)

Personal data protection is nothing new, and the implementation of the GDPR will be the next step. New regulations and data protection laws are catching up with the consistent technology evolution. The original GDPR proposal started in 2012. The formal adoption of the laws have been ongoing since April 2017, and come into force on 25 May 2018.

On one hand, the GDPR guarantees new rights for data subjects.

A data subject is any personal data or information relating to an individual. With the new regulation, data subjects have to actively spell out consent; implicit consent will be banned and consent can be retracted. It'll also be possible to deny profiling. Moreover, the data subject can request their personal data and is allowed to transmit it.

On the other hand, the GDPR sets new obligations for the data controller and data processor.

The data collector decides how to process personal data. Processing personal data will still be possible, but the data collector/processor has to make sure that none of the subject's rights are infringed and has to prove that the GDPR rules are followed. Furthermore, international transfer of personal data is restricted and authorities have to be notified immediately in cases of breach.

14 million websites around the world currently offer the possibility to log-in with your Facebook details. As a result, Facebook can access personal data to track their users even outside their own platform.

This is something that Gravity (and similar structures) can provide to advertisers. Using the personal log-in, they could easily access viewing habits and shopping routines, as long as they ensure there won't be a joint data pool. Those are currently the biggest advantages. Furthermore, forgotten log-ins won't be a big issue anymore as click-and-buy will be the easy norm.

Interview.

Addressable TV in Europe

There is now a global picture of addressable TV in Europe and around the world: smartclip in Germany, SkyAdsmart in the UK, tests with Orange and SFR in France. Here is an insight into the recipe for success of smartclip, a leading programmatic video platform and technological innovator.

Thorsten Schütte-Gravelaar
Managing Director
smartclip

What is smartclip? How did the idea come about?

Today, smartclip curates the online video advertising inventory – more than 700 publishers and broadcasters worldwide – and manages the integration and delivery of online video advertising to all internet-connected devices for on-demand and linear content. As a leading programmatic video platform and technological innovator, smartclip develops marketing technologies such as addressable TV and out-stream video advertising.
In a nutshell, we intend to merge TV with digital ad technologies to effectively combine ads and delivery logistics. This is a huge step forward for the advertising sector and for RTL in turn. It also represents real value added compared to Google and Facebook, because as of now, they don't have any comparable, perfectly combined TV and digital products.

How does smartclip position itself when set against other offers?

Addressable TV advertising is the new wave of innovation, and experts predict that it will have a major ➤

Addressable TV advertising will have a major impact on the TV advertising industry within the next few years.

40%

of all households are already receiving addressable TV ads in Germany

impact on the TV advertising industry within the next few years. For instance, Google has recently announced the availability of traditional TV inventory in the US through DBM. But, addressable TV in the US and Europe must be considered separately, as the status, technologies and key players in these regions are very different.

Addressable TV in the US

A study conducted by the Video Advertising Bureau[1] claims that the footprint of addressable TV is 50 million households in the US alone.

Addressable TV households are enabled through set-top boxes using the infrastructure of operators like AT&T, DISH and Comcast, with the inventory limited to two minutes per hour. Google's scoop about addressable TV is about ad inventory now accessible on DBM through partnerships with SSPs like WideOrbit, or using their own ecosystem, Google Fiber. Most of these concepts make TV inventory available in proprietary ecosystems, and only allows 1:1 real-time ad delivery on a limited scale, if at all. In some cases, addressable TV refers to delivering ads to TV content that isn't broadcasted, but available through the operator or TV channel's on-demand selections.

/ Addressable TV is about to take off in all major European TV markets like France, Spain, the UK, Italy and Sweden.

Addressable TV in Europe

In Europe, addressable TV is defined as the merge of online ad technology and traditional TV broadcasting. Advertisers and broadcasters have already been delivering 1:1 real-time ads into the broadcast live stream since the end of 2015. Market-wide technology standards in Europe have paved the way in allowing advertisers to provide real-time ad delivery into broadcast TV on a large scale. In Germany, more than 40% of all households are already receiving addressable TV ads, delivered by ad serving technology, for more than 90% of all adfunded TV channels.

Smartclip is one of the key players for standardizing addressable TV ad technology in Europe. By the end of this year, smartclip will serve more than 50 premium TV channels throughout Europe using its addressable TV solution.

In 2015, the first live case of addressable TV in Europe was set up via the smartclip addressable TV platform. This allowed advertisers and agencies to deliver their advertising into linear TV in adserver-based real time. Based on the HbbTV model, which is integrated in web-enabled TV sets, advertising can be served via the smartclip adserver structure into broadcast channels according to online criteria. With more than 16 million TV sets to control in Germany, which can be addressed when activated, the critical reach for digitally controlled advertising campaigns has long been achieved. This doesn't make traditional ads any less valuable. On the contrary, it strengthens TV as an advertising medium overall. Smartclip makes this advanced technology available to broadcasters and is constantly enhancing it. The next step is the ATV programmatic platform "A-TVx" (SSP), which is especially catered to linear TV and allows broadcasting partners to take full advantage of data-driven, real-time advertising.

How can you explain the fast and successful development of addressable TV in Germany versus other countries?

Addressable TV is about to take off in all major European TV markets like France, Spain, the UK and Sweden. With an estimated budget volume of 3 digit million euros by 2020 in Germany alone, addressable TV is expected to be a very healthy expansion of the core business for broadcasters. So, it's no surprise that European broadcasters strive for solutions that keep them in the driver's seat and oversee the monetization and data points of their TV inventory.
As of this year, all relevant commercial TV broadcasters are offering addressable TV ad formats in Germany to their customers, and they've been in high demand. The reason is simple – because it's possible. The ATV platform lets broadcasters use an existing infrastructure for their marketing business, which makes for a fast, seamless integration. It also lets them zero in on their core business, programmer development and marketing. About two-thirds of all relevant broadcasters in Germany use the smartclip ATV platform for their marketing scheme. Now it's also possible for broadcasters at a European level to get on board.

What is the benefit of this technology for advertisers in terms of reach, repetition and digital similarities?

A crucial asset is the intelligence, which allows the contact classes to be controlled precisely and without any scatter loss. This includes frequency capping, creative optimization and targeting, to mention just a few. Addressable TV can add value to the TV advertising landscape in many ways. It's particularly attractive because you can advertise regionally and reach specific target groups, then use the feedback to assess campaigns as well. Advertising messages can therefore be placed more efficiently and in a more logical order.
Almost all the well-known free TV channels are hoping to use smartclip to tap into a new customer market – such as a regional furniture chain – as ad campaigns can be applied from as little as 50,000 euros. On the other hand, existing customers should be able to increase their TV campaigns' effectiveness by targeting their traditional ads. ➤

Addressable TV combines the best of both worlds: broadcast TV and online advertising. Thanks to this technology, broadcasters allow brands to deliver a more personal and relevant ad experience.

The next step is sketched out: the TV channels will connect their offer to the automated booking process and will then be able to deliver TV ads in data-based real time via adservers.

Smartclip technology is founded on three key elements: monetization, technology and services. Thanks to the new reverse channel capability, broadcasters can now use reach and awareness in real time and customized TV – from product storytelling to POS integration. Again, this doesn't make traditional ads superfluous, but actually strengthens TV as an advertising medium overall. Traditional linear TV can now match up with global, digital platforms. Data-based advertising is possible in TV, which is the leading medium for engaging an audience.
The technology boosts TV channels' access to new customers and extends the opportunities for their existing customers. This is real growth potential in an increasingly fragmented market. The number of networked smart TV devices in households is growing at a rapid pace, along with addressable advertising.

What are the results so far?

In recent months, campaigns adding up to more than three figures have been carried out via our platform in Germany. As we've been teaming up with many well-known broadcasting partners, we've been able to achieve the necessary reach that major advertising clients in the FMCG, automotive and finance sectors need for their advertising strategies.
Addressable TV can add value to the TV advertising landscape. It's particularly attractive that the advertising can be controlled for target groups or even regionally, and then data can also be obtained to assess the campaigns, too. Advertising messages can thus be placed more efficiently and in a more meaningful sequence. No other digital advertising format is on par with such a high reach, while still offering targeted delivery in a high-quality, brand-safe environment.
The forecasts are correspondingly optimistic: addressable TV is a significant key to branching out businesses and is leading the market's evolution. This is confirmed in Germany by the surge in campaigns and campaign volumes.

What does the HbbTV1 norm allow and what would be the benefit of an HbbTV2?

Further enhancement of HbbTV2 would make the interplay between TV and online video even more fluid. It would replace the ad break with digitally targeted spots. All the know-how that suppliers and advertisers have gained today through addressable TV ad formats (HbbTV1) can be immediately put into action for the next development stage. As planning at a 1:1 level for devices is a completely new approach to TV, we have to learn the ins and outs to offer totally new opportunities for the creative process, and ways to address customers. All in all, timing and experience are the determining factors in the competitive world of advertisers.

What's in the cards for the coming months and years?

With addressable TV, we've ushered in a new field of TV marketing that we're continually developing. As of now, we've launched the first programmatic broadcaster platform, the A-TVx, that is especially devised for linear TV market. The next step is sketched out; the TV channels will connect their offer to the automated booking process and will then be able to deliver TV ads in data-based real time via adservers. The first live tests have been successfully carried out in Germany with IP Deutschland. It's a unique market strength for broadcasters as they have access to TV usage data. They're the only ones who can offer a necessary marketing push to the top advertisers, who invest the biggest part of their advertising budget in TV. We're now conducting intensive test stages with large broadcasting groups throughout Europe to branch out their marketing offer.

[1] *Video Advertising Bureau Addressability Report: www.thevab.com/wp-content/uploads/2016/11/VAB-Addressability-Report.pdf*

The Voice van Vlaanderen

VTM, Belgium

The Future of Connected Experiences

When we look at how Gen Z kids go about their daily routines, there is rarely a single situation in which they're isolated.

Bianca Stockreiter
Innovation Analyst
TREND ONE

Technology enables a constant connection with our peers; we let our friends have a peek at what music we are listening to, we tag each other in relatable memes, and have a constant stream of messages in our numerous WhatsApp groups. With continuously evolving technological devices, the question remains: what's next for the future of connected experiences? **What digitally empowered forms of apart-together-ness will we witness in the upcoming years? Let's see.**

Facebook recently announced plans to produce TV-like shows. In the future, social platforms will be our prime source for content. Not only for news content or personally shared content, but for all media and entertainment content as well.

Twitch, the social gaming platform, is already paving the way in this direction. We might live in different cities but we can meet up on Facebook to watch a TV-like series. We'll laugh and cry, and when we tell other people about it, it'll sound as if it were a real date, **because digitally connected experiences will be just as real as a get-together in person.**

Even though video live streaming has taken a bit of a hit after a big hype two years ago, the ball is still rolling towards real-time connection. Will it take off again? I say yes. Right now, we're on the brink

In a more distant future, we'll even be able to share smells and thoughts, even if we're actually sitting alone in our living room.

of moving from pre-recorded stories to live stories, like on Instagram or Snapchat for example. But there still are limitations, such as data bandwidth and device maturity. Soon, the next wireless telco-standard 5G will roll out. What's more, smartphones and other wearable devices will have much better technical specs for cameras, microphones and sensors. **Once these barriers are gone, there is – technically – nothing getting in the way of a live stream for everyone's daily life.**

Let's look even further down the line. Virtual reality will expand our understanding of what it can mean to be apart together. Social Hangouts in headsets like Oculus Rift and PlayStation VR will bring on a much deeper level of connection. Friendships and dating will have a second home. The next generations of VR will charm us with the transmission of touch or temperature. In a more distant future, we'll even be able to share smells and thoughts, and design virtual experiences exactly the way we want to. We'll be able to really feel what's happening, even if we're actually sitting alone in our living room.

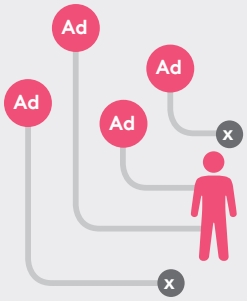
Whatever the future holds – as long as the emotions we feel are real – the connected experience will be real for us.

The Big Bang Theory
Q2, Belgium

The 4 Key Levers of Ad Quality

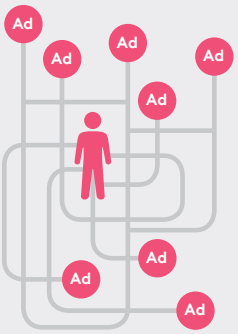
Before

In traditional media buying, you knew where you were advertising, **but not who was viewing your ad.**



Now

With the increasing automation of today's digital media buying, you are no longer buying media, but audiences. This shift has led to far greater efficiencies for buyers and sellers, **but has also created a lack of transparency for advertisers on where their ads are being placed.**



Ad quality revolves around 4 key elements:

- **Viewability**
- **In-target**
- **Invalid traffic (IVT)**
- **Brand safety**

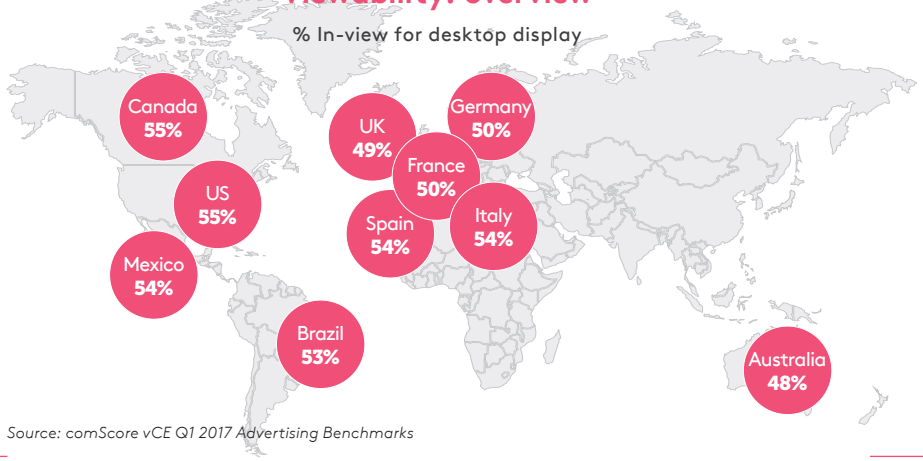
Martin Bromfield
VP Advertising EMEA
comScore

Viewability benchmarks

In most markets, around half the ads did not have the opportunity to be seen (OTS). **Optimising campaigns in-flight is therefore essential** - by market, publisher, placement and creative.

Viewability: overview

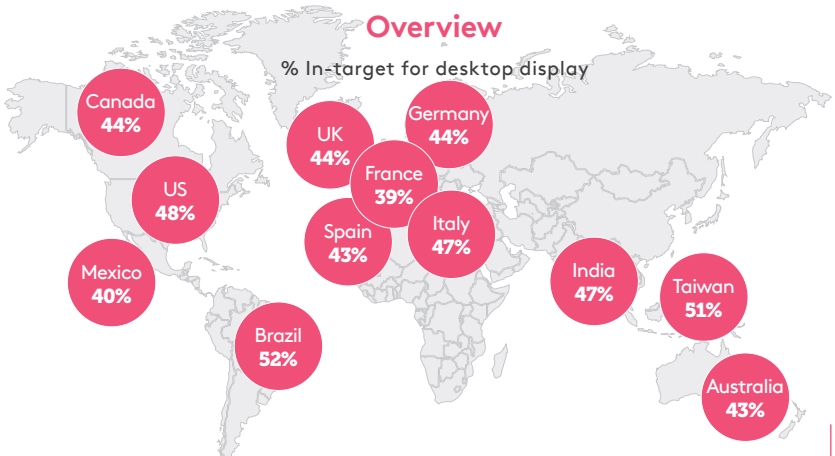
% In-view for desktop display



Source: comScore vCE Q1 2017 Advertising Benchmarks

In-target benchmarks

Across the globe, the majority of display ads delivered **did not reach their primary target.** In-target rates ranged from: **39%** in France to **52%** in Brazil.

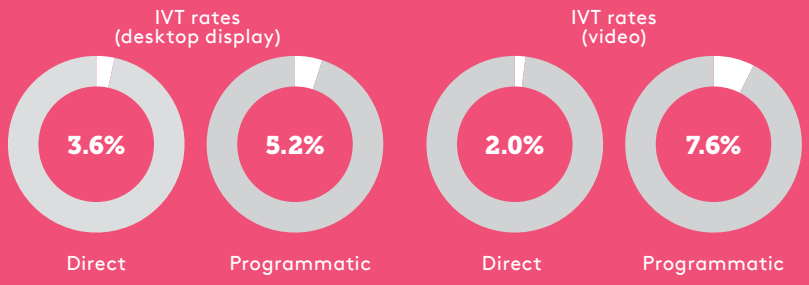


Source: comScore vCE Q1 2017 Advertising Benchmarks

Invalid traffic

Programmatic buys are more susceptible to invalid traffic than are direct buys. **IVT rates on programmatic video more than triple those seen through direct buys.**

High-value ads attract the most IVT



Source: comScore Global Snapshots based on Q1 2017 comScore vCE Advertising Benchmarks

Brand safety

With the amount of negative publicity that brands have endured from advertising against inappropriate content, this is becoming an ever more vital part of the campaign validation process, not only to reduce wasted spend but, more importantly, to reduce reputational damage.

In a nutshell

1. Filter-out unsafe impressions pre-bid

- Choose from a rich set of brand protection category filters to avoid bidding on unsafe inventory
- Customize and refine your brand safety criteria with your own keywords
- Create and maintain blacklists and/or whitelists based on page-level brand safety criteria

2. Protect your brand in-flight

- Set real-time alerting and blocking to identify and protect against unsafe content throughout the campaign lifecycle

3. Evaluate delivery post-campaign

- Understand where threats persist across all media partners through comprehensive post-campaign reporting
- Refine blacklists and whitelists to target


MAKE UP
FOR EVER
I'VE GOT

La France a un Incroyable Talent

M6, France

The "CAT" in the Cross-Media Jungle

How to measure and value every media solution in a cross-media project

Technology has changed our lives: communication has improved, touchpoints have increased, and media consumption begins when you get up and lasts all day long on multiple platforms. For customers, it's essential to redefine the communication process and content, while optimizing the cross-media strategies to cater to their target, maximising their consumer reach.

Elena Nigra
Media Scene Manager
Rai Pubblicità

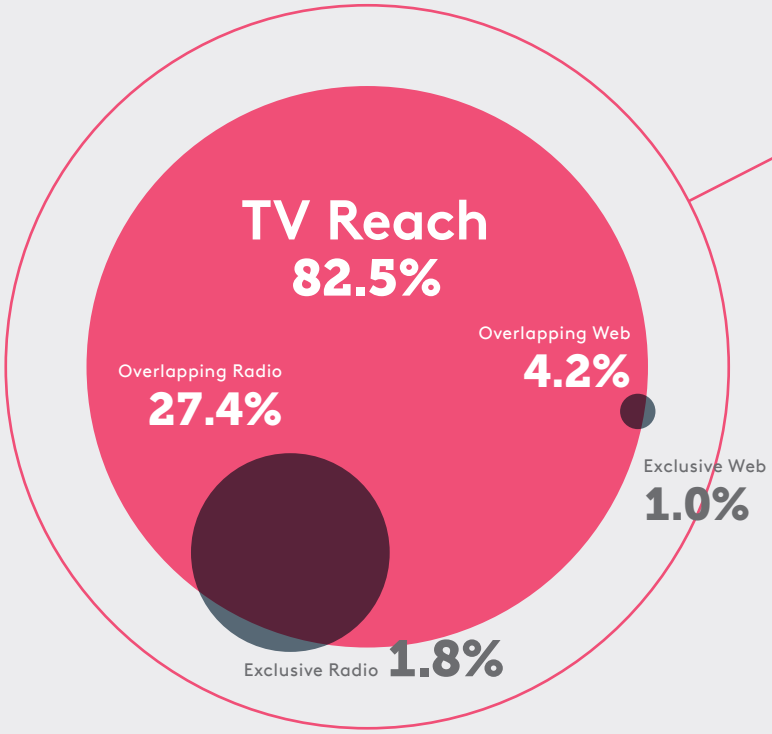
In the advertising market, information and data are in high demand, so in 2013, Rai Pubblicità started its advanced test to provide its customers with an effective cross-media audience measurement tool. The Cross Audience Tool (CAT) is a multimedia and cross-media measurement tool. CAT allows you to get duplicated and unduplicated metrics like GRP, reach, OTS for projects based on cross-media programmes or cross-media customer plans.
One example is a project based on the multimedia Euro Football Championship 2016 programme. Using CAT, Rai Pubblicità measured its cross-media football event bundle giving customers a complete analysis of each media contribution. The Euro Football Championship reach high audience numbers with TV but with cross-mediality Rai Pubblicita's customers have had even better results. In fact, the radio worked on OTS and boosted its exclusive reach by 2%. The web added an additional 1% of exclusive reach. In the end the plan reached a wider total audience of 85.3%.

CAT is a multimedia and cross-media measurement tool, made possible by adding and linking each media currency and media data estimations.

Another interesting example for using CAT is cross-media customer planning: brand X wanted to reach a socio-demographic target, and the Rai plan had the following investment share: 69% TV, 14% radio, 10% digital and 7% cinema.
Also, in this case, the contribution of each media is fundamental, and for many reasons, in addition to TV, the total audience was almost 14 million. The TV reach was 41.8% and, as usual, cross-media planning gave back better KPI results than mono-media planning. Thanks to cross-media planning for the radio, the customer was able to reach 19% of its target,10.6% of which was exclusive. On the digital front, its reach was around 1.9% with an exclusive reach of 1.1%.
Today, with more touchpoints for customers, it's essential to redefine the communication process, to tap into each media solution's strengths and use cross-media projects to reach higher efficiency. Rai Pubblicita's tools can also measure cross-media projects on many different targets like consumption or value targets.

In the age of multimedia and addressable media, companies are more and more interested in talking to specific consumers and minimizing the dispersion of contacts. With CAT, they can anticipate brand consumers, non-consumers, product categories, and consumers of competing products, as well as heavy, medium and light users.
The tool can also work on value targets; engaging communication should be integrated, coherent, and communicate the values of the brand so that people understand them, as they are their values too. This means not only to get the message across, but also to establish a relationship.
Rai Pubblicità has reconstructed the 10 categories of values that are most frequent in communication strategies and those being used to understand the identity of commercial brands.
Finally, CAT and others tools help Rai Pubblicità to be more competitive on cross-media measurable projects around quality content, using all the touchpoints in the best context to be engaging, integrated and coherent. X

CAT Euro Football Championship 2016



85.3%
Total Audience

44 618 000
Adults 14+

Total TV 82.5%
Total Radio 29.2%
Total Web 5.2%

Source: Rai Pubblicità on GfK-Mediasoft data

Behavioural Targeting at M6

While socio-demographic targeting on TV has proved to be an efficient way to select the right audience, M6 Publicité has enriched the targeting approach by adding an affinity and behavioural brick to the existing core target group: Adults 25-49.

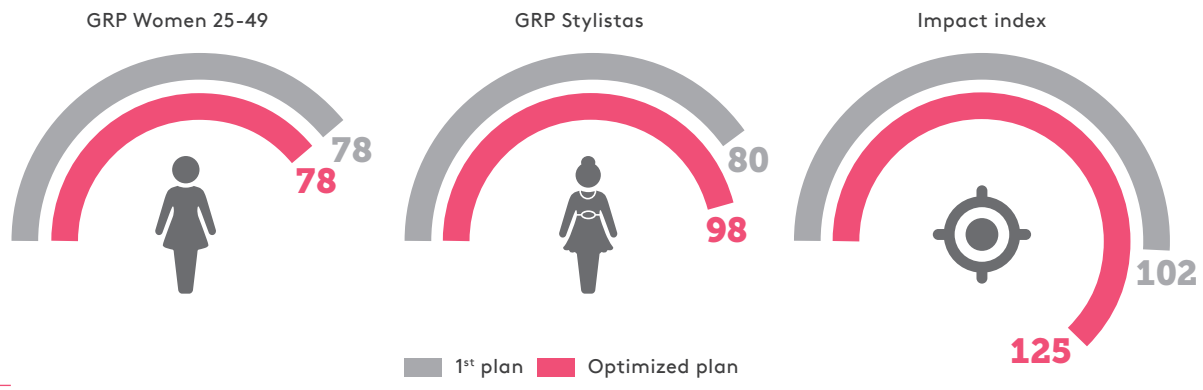
Methodology: a merger between Kantar TGI and Médiamétrie data

The Kantar TGI panel is a media-market tool that links socio-demographic, media consumption, consumer behaviours and attitudes on an individual level. Based on Kantar TGI items reflecting behaviour and attitudes, M6 has defined 6 key target groups as heavy consumers, digitally connected and receptive to innovation. Individuals in these target groups were linked to Médiamétrie panel members to fuse data from both panels allowing to focus on their TV consumption. This new way of targeting consumers will generate common value between M6 thematic programmes and advertising sectors.

Usage: implemented in agency planning tools to control and optimize TV plans

Behavioural targeting will help advertisers and agencies select the ad-breaks in affinity with the new target groups and achieve better business results for an equal budget and cost per GRP. This targeting has delivered daily data on the 6 target groups since September 2016 and back data from September

Manual spot-by-spot optimization of planning



The 6 Profiles

Stylistas/Women 25-49
(3.3M Individuals)

Foodistas/Women 25-49
(4.7M Individuals)

Home Movers/Adults 25-49
(3.7M Individuals)

Deco lovers/Women & Adults 25-49
(4M Women & 6.2M Adults)

Connected Shoppers/Adults 25-49
(8.6M Individuals)

2015 onwards in audience, planning, ad tracks and post-campaign analysis tools. These target groups cannot be bought, they only serve to optimize plans on existing target groups.
An example of optimized plan: manual spot-by-spot optimization of planning to select ad breaks with a higher impact index (+23 pts gain on Stylistas vs Women 25-49), while maintaining the same budget, cost per GRP, day parts & reach on the reference target group, Women 25-49.

Top Chef
M6, France

Spott
by Appiness

IP Belgium is offering new forms of interactivity to advertisers thanks to the Belgian Spott application! Two features are offered.

Ludovic de Barrau
IP TV Director
RTL BELGIUM

E-Shopping for products seen on screen

Spott allows viewers to buy products seen on programmes in one click. The app is active for numerous TV shows on RTL TVI, Club RTL & Plug RTL – 3 and a half hours of broadcast per day – addressing many different viewer profiles.

Interactive advertising

During ad breaks, TV Spott, marked with the Spott logo, allows viewers to interact immediately with the advertiser's brand using the app, to activate a call-to-action promotion. Interactive spots will be placed in preferential position (last position).

Spott downloads in Belgium

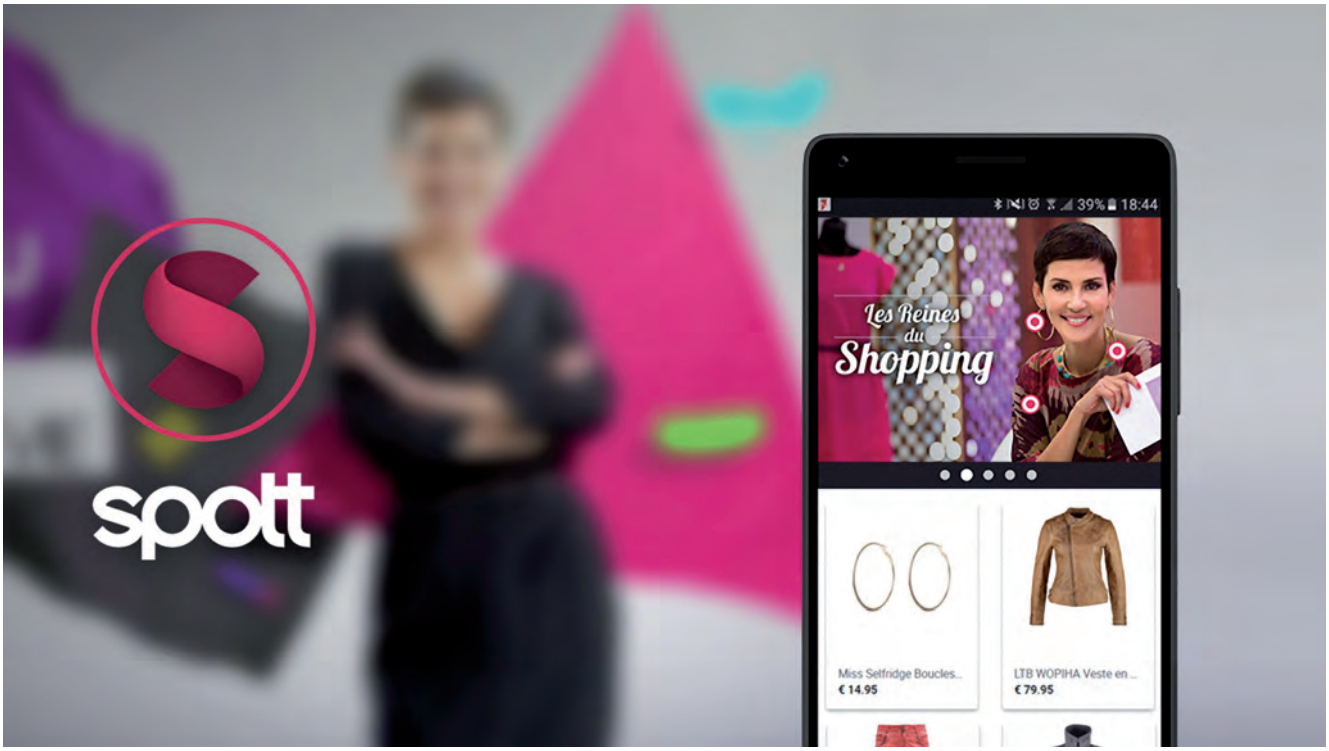
70,400

57,600

The case: JBC & Spott interactive advertising campaign on RTL Belgium channels

Online fashion retailer JBC has added Spott's interactive feature provided to its TV Campaign from 10 October 2017 to 22 November 2017. The incentive includes a 10% rebate for viewers who synchronize their Spott Apps with the spots!

The campaign resulted in 10,000 new JBC brand subscriptions on the Spott app, 106,000 page views for the brand via the app, 9,400 products clicked and 310 products bought! Using Spott as an interactive element boosted viewer engagement for their TV campaign and made the JBC brand more likeable and innovative.



Scorpion

RTL TVI, Belgium

Bring Emotionality to a Technological Topic

Global versus Local

Ten years ago "Globalisation" was the buzz word in every country. Advertisers loved the idea of bundling together know how and centralised steering of budgets and negotiations. What many seem to have forgotten these days is the old but timeless phrase "All business is local". As a service company with more than 350 branches throughout Germany, localisation is extremely important for us. In case of any damage incurred, a customer needs help immediately; he wants somebody who understands his needs. Proximity not simply in terms of local availability but also as an emotion is a very relevant need. This is something we can deliver locally, supported by the quality and safety guaranteed by a huge globally active company. Over the years we learned that in terms of glass damage all people throughout the world seem to have similar needs. This is why we share best practice with our colleagues across the world. However, when it comes to local needs and specifics we strongly believe in local strategies.

Bianca Brueck-Sartorius
Senior Media Manager
CARGLASS®

Strengths of video advertising

Until 2009 Carglass® was famous for a completely unusual communication strategy. The brand was built by a mono radio campaign. With 60 second spots and massive ad pressure we managed to build a remarkably high brand awareness. However, after increasing budgets and ad pressure year after year visibility turned out to be missing. As a service provider with branches all over Germany it is important to show the logo and the colours so that customers can find us. Additionally our offer needs to be explained. It is much easier to understand how windscreens can be repaired if you can see the technology.

In a nutshell: with video we are able to explain our relatively complex product. What's more, it enables us to bring emotionality to a technological topic and to educate people quickly and in an entertaining manner.

Challenges for data usage

In the early stages, our customers could reach us by telephone or drive directly to one of our service centres. Today, increasing digitization has created further touchpoints for our customers and has made things like "opening hours" obsolete. Nowadays, our customers seek further information on the website by using different mobile devices (smartphones, tablets, etc.) or receive detailed information of their appointment via the Carglass® App. The challenge nowadays is to collect and merge all these data and make it attributable to each unique user from the very beginning and to create insights for a holistic statement to derive a strategic recommendation. Especially when advertising we need to understand the effects of this on our business. We can do so by identifying the isolated advertising impact of either mono campaigns or the synergy effect of media mix campaigns.

Being Closer to People Is Paramount

Global versus Local

Media strategies need to remain fully attuned to the local media landscape specificities and capitalize on the local cultural events to best maximize our return on investments. In a world where the last decades of globalization are being challenged, the acceleration of automations are looming over the labour market and consumers' trust in all institutions is at the lowest, being closer to the people we seek to engage into our brand experiences is paramount.

Having said that, we also have to adjust to strong and growing global trends: people around the world keep on migrating from local traditional media scenes to global digital platforms and we cannot ignore that, in this space, companies like ours need to equip themselves with new organisational set-ups, systems and talents to best deal with both the growing complexity of the new media plan and the higher consumer and technological expectations. The role of the global teams are very rapidly evolving and we are gravitating towards a much more complementary set up where all teams within the matrix deliver a unique contribution.

Geraud Benoit
Group Media Director
FERRERO

Strengths of video advertising

Video advertising remains the most effective tactic into marketers' arsenal to bring consumers down the purchase funnel. Video tells both consumer and product stories in a multisensory way at scale. The higher the attention the highest its impact on both equity and sales. We know that video does not need to have our consumers full attention to work, frequency contributes to building the necessary familiarity which removes barriers to purchase and its strong weekly reach across standard and digital screens to driving our sales. Short unskippable format is our preferred standard in this space. We have however realized that we now need to communicate on topics we were not used to communicate (quality, sourcing) and that we need to increase the relevance of our products among our consumers lifestyle either by involving them in the construction of our brands, entertaining them, helping them or educating them. Video is obviously a fantastic tool to help us fulfilling those objectives but we then need to ensure that we deliver content on our audience terms and we will track our success in terms of first engagement (completion/likes/comments) and then when the content is really strong shareability.

We know that high quality placements and better targeting drive both higher returns and stronger engagement so we will favour and be ready to pay a premium for it, as long as it remains proportional to the return and brand equity uplift we notice in our effectiveness analysis. Obviously, this will be among human, visible and measured inventories.

Challenges for data usage

I have a plethora: sourcing it, scrutinizing it, assessing its cost effectiveness once you have paid all the tech taxes, scaling it, exploiting it with marketers. just to name a few.

And with the European laws drafted by people remotely interested and educated on the topic, a growing consumers' concern around data privacy. We are left with a lot of questions as to its true sustainability at least in Europe.

Case Studies.

Online Campaign, Product Placement, TV Spots & Sponsorship

When Lastminute.com Meets Talent Shows

The Objective.

To increase Lastminute.com's popularity and visibility in France and the UK, and attract new customers.

The Media Partners.

The campaign was based in the UK on the famous *X Factor* TV show broadcast on ITV and the affiliated Facebook page, as well as the French talent show, *La France a un Incroyable Talent*, broadcast on M6.

The Brand Idea.

Associate the brand with the most popular French and British talent shows and create an original operation focused on brand storytelling around travel, music and entertainment, to impress and galvanise the target audience.

The Plan.

UK

A strong online campaign kicked off with pre-show warm-up Facebook lives and the broadcast of "Last-Minutes.com moments", a short & entertaining video series hosted on Youtube, *The X Factor* app and the website. On top of that, an in-show product placement was organized around travel thematic: the Girls and the Overs received a magenta envelope with a branded card announcing that they were going to the dream judges' house in Los Angeles and Malibu with lastminute.com.

An exclusive package was set up, surprising a contestant with a sightseeing tour across London and a museum visit. New York and Los Angeles holiday prizes were arranged for the home viewer competition. Finally, a live final partnership was put in place with the Top Secret Hotel's Package: purchase a hotel room in London and earn 2 live final tickets.

France

The brand sets up a sponsorship deal for the program for 8 weeks, and a series of 20" licensed TV spots featuring Eric Antoine, a famous French magician & humorist, who invited the audience to play on Twitter using the hashtag #vacancesmagiques, to win a trip offered by Lastminute.com. In addition, a microsite was launched with contest explanations, added content about the show, brand presence and promotions activation. This buzz was posted on Facebook as well.

The Results.

UK
Facebook Lives Results

126.3K total views
63.15K average views
67.67K views on most watched video

"Lastminutes.com Moments" Results

338.39K total views
56.39K average views
89.49K views on most watched video

Live Final Partnership

Lastminute.com sold
65 hotel rooms
in a week

France
TV SPOTS

123.6 GRP 25-49 y.o.
23 090 952 contacts

SPONSORSHIP

794.6 GRP 25-49 y.o.
148 447 172 contacts

Paypal Attracts Attention of Consumers with Telepromotion!

The Objective.

PayPal was looking to attract the attention of Spanish consumers, develop its brand visibility and motivate the target audience by linking up with a famous talk show.

The Media Partners.

The first talk show in Spain, *El Hormiguero,* broadcasted on Antena 3 and hosted by Pablo Motos and Ana Morgade.

The Brand Idea.

A creative idea for effective package based on telepromotion, and a special licensed spot to promote services and be in affinity with the core target – urban upper-class adults – while reaching a large audience.

The Plan.

A telepromotion package has been set up during the show: a 45-second endorsement with Pablo Motos and Ana Morgade. During this special operation, the two hosts focus on PayPal services through a creative dramatisation in which Ana explains how she bought her new glasses. She highlights the user-friendliness and the safety of the online payment, and finally convinces Pablo to use it.
Plus, PayPal ran a series of licensed TV spots (25 x 30 seconds) with Ana Morgade, in which she gave a breakdown of PayPal's services. The environment for this spot was *El Hormiguero* (Antena 3) and *Zapeando* (La Sexta). Ana Morgrade sent out 3 tweets and 3 Instagram posts for a social media boost.

The Results.

The plan was a success, with a great volume of reach generated in a minimum amount of time:

106.5 GRP
on Adults 16+ (50,9% REACH)

84.8 GRP
on Adults 25-44 ABC 1 (44,5% REACH)

Exclusive Concept to Boost Marc Cain's Image

The Objective.

Marc Cain, a premium women's fashion brand, wants to increase client loyalty with content development and create a closer connection and identification with the format.

The Media Partners.

Holland's Next Top Model, a popular fashion TV show broadcasted on RTL 5. This year, the programme is going through a few changes that are beneficial for the brand image: more up-market positioning, closer connection to YouTube & social media, and a new presenter called Anna Nooshin.

The Brand Idea.

To develop the brand image using an original package: a sponsorship with *Holland's Next Top Model* and partnering up with a famous fashion expert who'll become the spokesperson for Marc Cain.

The Plan.

Marc Cain becomes the official sponsor of the show, with a presence on 36 billboards and 9 exclusive TV episodes. Midrolls have also been set up for a stronger online presence.
Anna Nooshin is about to become the ambassador of the brand through several strategies. The TV host will wear Marc Cain outfits during 3 episodes and create additional on-air brand moments: shopping, backstage before show, after show, etc.
To push the campaign further, an online integration and a vlogger endorsement with Anna Nooshin will be launched to motivate the online community. There'll be a raffle of one outfit, 3 vlogs on her YouTube channel and 3 posts on her Instagram page.

Holland's Next Top Model
RTL 5, The Netherlands

A plan to create more buzz is in the works: media posts on Marc Cain website and setting up MPN pre-rolls on Anna's YouTube channel.

Anna Nooshin

The Results.

200,000
Ads Impression
Mid-rolls

Haier & Das Perfekte Dinner: a Powerful Sponsorship

The Objective.

To help Haier, the world's top refrigerator producer, to promote its range of products in Germany and create a positive sales impact with an efficient operation.

The Media Partners.

Vox, a strong channel in Germany, associated with the popular cooking TV show *Das perfekte Dinner*.

The Brand Idea.

To gain viewers' confidence in Haier's products and help them identify with the participants of the culinary TV show thanks to a combined sponsorship with content affinity, as well as a licensing agreement for instore impact.

The Plan.

A comprehensive double package: firstly, a sponsorship campaign from May to July 2017 that boosts the brand image and increases its reliability. Secondly, a one-year 360° licensing campaign to raise brand visibility. This licensing offer includes distribution discussion and events, website homepage presence, social media activation, mailings, and a presence on several point of sales.

Key Tables.

Viewing Time

Viewing Time Per Individual in Minutes

Country	Target Group Individuals	2014 Mon–Sun	2015 Mon–Sun	2016 Mon–Sun		Maximum Peak Mon–Fri	Viewers During Peak Mon–Fri
Austria	3+	162	161	+4.3%	**168**	20:45	2 839 080
Belarus	4+	227	227	+2.6%	**233**	21:15	2 584 294
Belgium North	4+[1]	201	197	=	**197**	21:00-21:15	2 619 815
Belgium South	4+[1]	233	237	+3.0%	**244**	21:15	1 822 128
Bulgaria	4+	223	231	+2.2%	**236**	21:15	2 587 440
Croatia	4+	259	266	=	**266**	21:15	1 750 111
Cyprus	4+	210	205	-0.5%	**204**	21:45	312 245
Czech Republic	4+	207	206	+1.5%	**209**	20:45	4 107 464
Denmark	3+	173	172	-7.0%	**160**	20:45	2 006 819
Estonia	4+	221	228	+2.6%	**234**	21:00	541 632
Finland	4+	176	171	+0.6%	**172**	20:45-21:00	1 970 202
France	4+	221	224	-0.4%	**223**	21:15	25 199 776
Germany	3+	221	223	=	**223**	21:00	31 458 101
Greece	4+	257	269	-4.1%	**258**	22:30	4 008 207
Hungary	4+	288	286	-1.4%	**282**	20:45	4 285 939
Ireland	4+	184	185	-3.2%	**179**	21:15	1 509 293
Italy	4+[1]	262	254	-2.4%	**248**	21:30	26 182 430
Latvia	4+	210	211	-7.6%	**195**	21:00	753 876
Lithuania	4+	204	214	+5.1%	**225**	21:15	1 007 188
Luxembourg	12+	141[2]	160[3]	+0.7%	**161[4]**	21:00	223 000
Macedonia	4+	272	280	-1.8%	**275**	21:30	779 554
Netherlands	6+	200	190	-3.7%	**183**	21:00	6 657 200
Norway	2+	163	161	-3.7%	**155**	21:45	1 559 066
Poland	4+	260	264	-0.8%	**262**	20:45	15 330 105
Portugal	4+	296	283	+1.4%	**287**	21:45	4 832 316
Romania	4+	340	327	+0.6%	**329**	21:00	8 203 607
Russia	4+	244	246	+0.8%	**248**	20:45	23 887 630
Serbia	4+	304	315	+0.6%	**317**	21:15	3 039 350
Slovakia	4+	228	228	+1.0%	**235**	21:00	2 241 635
Slovenia	4+	199	206	+4.4%	**215**	n.a.	n.a.
Spain	4+	239	234	-1.7%	**230**	22:30	18 033 030
Sweden	3+	153	154	-3.2%	**149**	21:00	3 439 000
Switzerland (G)	3+	128	124	=	**124**	21:15	1 573 200
Switzerland (F)	3+	143	144	=	**144**	21:15	600 399
Switzerland (I)	3+	177	172	-0.6%	**171**	21:30	135 600
Turkey	5+	247	244	=	**244**	21:45	22 413 727
Ukraine	4+	262	249	-0.8%	**247**	21:15	14 775 894
United Kingdom	4+	221	216	-1.9%	**212**	21:15	14 775 894
Total Europe		**237**	**235**	-0.4%	**234***		
EU[6]		**234**	**232**	-0.9%	**230**		
China	4+	157	155	-5.8%	**146**	n.a.	n.a.
India	4+	n.a.	136	+4.4%	**142**	n.a.	n.a.
Japan[7]	4+	264	262	=	**262**	n.a.	n.a.
United States	2+	282	274	-1.5%	**270**	21:15-21:30	106 234 672

[1]Including guests; [2]Data for 2013/2014; [3]Data for 2014/2015; [4]Data for 2015/2016; [6]Weighted average without Malta; [7]Kanto region.
**RTL AdConnect's own calculations.*
Source: EURODATA TV, local institutes – reproduction forbidden, all rights reserved by MÉDIAMÉTRIE

Key Tables.

Digital TV

Country	TV HH *in 000*	All Digital *in % of TVHH*	IPTV *in % of TVHH*	Digital Cable *in % of TVHH*	Digital Satellite *in % of TVHH*	Digital Terrestrial *in % of TVHH*	Only Analogue Terrestrial *in % of TVHH*
Austria	3 693	90.3%	8.7%	22.5%	54.1%	5.0%	0.0%
Belarus	3 797	65.0%	38.0%	7.7%	7.3%	12.1%	0.0%
Belgium	5 264	91.8%	32.2%	51.9%	6.2%	1.5%	0.0%
Bulgaria	2 926	96.6%	10.2%	18.9%	36.7%	30.8%	0.0%
Croatia	1 507	99.2%	26.1%	9.7%	10.7%	52.7%	0.0%
Cyprus	302	94.8%	42.5%	11.6%	3.9%	36.8%	0.0%
Czech Republic	4 312	95.7%	7.3%	11.7%	29.9%	46.8%	0.0%
Denmark	2 384	100.0%	21.4%	53.9%	6.6%	18.1%	0.0%
Estonia	561	90.5%	32.7%	30.2%	6.6%	21.0%	0.0%
Finland	2 495	100.0%	13.9%	60.9%	4.5%	20.7%	0.0%
France	28 383	98.4%	41.4%	5.8%	28.2%	23.4%	0.0%
Germany	38 320	75.8%	6.0%	19.4%	43.8%	6.6%	0.0%
Greece	4 372	100.0%	3.0%	0.0%	26.6%	70.3%	0.0%
Hungary	3 890	79.6%	15.4%	21.5%	23.1%	19.6%	0.0%
Ireland	1 578	98.2%	5.0%	16.9%	55.5%	20.7%	0.0%
Italy	23 412	100.0%	1.9%	0.0%	29.5%	68.5%	0.0%
Latvia	741	88.9%	21.1%	25.9%	13.9%	28.0%	0.0%
Lithuania	1 209	82.5%	16.9%	14.4%	8.3%	42.8%	0.0%
Luxembourg	232	100.0%	23.2%	37.2%	19.9%	19.7%	0.0%
Macedonia	560	76.7%	18.0%	12.5%	4.0%	42.2%	0.0%
Netherlands	7 451	90.8%	30.3%	47.8%	7.7%	4.9%	0.0%
Norway	2 300	98.6%	20.2%	31.2%	29.8%	17.4%	0.0%
Poland	13 008	87.8%	3.4%	21.7%	48.6%	14.0%	0.0%
Portugal	3 869	100.0%	41.9%	32.9%	16.8%	8.3%	0.0%
Romania	6 952	74.3%	1.1%	33.5%	36.2%	3.4%	0.0%
Russia	52 707	73.9%	10.8%	7.7%	40.9%	14.5%	3.3%
Serbia	2 430	78.9%	20.3%	18.7%	11.6%	28.3%	0.0%
Slovakia	1 720	82.3%	15.7%	17.5%	33.6%	15.4%	0.0%
Slovenia	849	97.7%	37.1%	28.9%	6.3%	25.3%	0.0%
Spain	18 162	100.0%	20.3%	8.0%	6.6%	65.1%	0.0%
Sweden	4 450	74.8%	17.4%	16.5%	15.7%	25.2%	0.0%
Switzerland	3 321	97.8%	41.3%	51.1%	3.5%	1.9%	0.0%
Turkey	21 148	86.7%	3.6%	4.6%	78.6%	0.0%	12.1%
Ukraine	15 011	87.7%	0.9%	5.8%	24.9%	56.1%	0.0%
United Kingdom	26 460	100.0%	9.1%	13.7%	47.6%	29.6%	0.0%
Total Europe	**307 684**	**87.7%**	**13.5%**	**14.2%**	**35.1%**	**24.9%**	**1.4%**
EU[1]	**206 494**	**91.5%**	**15.0%**	**16.8%**	**31.3%**	**28.5%**	**0.0%**
China	412 981	92.1%	21.0%	45.7%	22.7%	2.7%	1.3%
India	174 485	84.0%	0.1%	42.3%	41.7%	0.0%	0.5%
Japan	51 291	100.0%	7.8%	56.2%	30.7%	5.3%	0.0%
United States	119 864	98.9%	9.3%	42.0%	28.2%	18.3%	0.0%

[1]*Without Malta.*

Source: IHS Markit, EURODATA TV, local institutes – reproduction forbidden, all rights reserved by MÉDIAMÉTRIE.

Key Tables.

Best Single Programme 2016

Country	Name	Channel	Genre	Rating in %	Share in %
				all individuals	
Austria	ZEIT IM BILD 1	ORF 2	News	20.6%	53.8%
Belarus	NOVOGODNIY GOLUBOY OGONEK (NEW YEAR'S PROGRAMME)	ROSSIA-Belarus	Variety Show	14.3%	34.2%
Belgium North	DE SLIMSTE MENS TER WERELD (THE SMARTEST PERSON IN THE WORLD)	Vier	Game Show	26.9%	52.9%
Belgium South	L'AMOUR EST DANS LE PRÉ (FARMER WANTS A WIFE)	RTL TVI	Reality Show	19.5%	42.8%
Bulgaria	KONCERT NA SLAVI TRIFONOV I KU-KU BEND (SLAVI TRIFONOV AND KU-KU BAND CONCERT)	BTV	Variety Show	20.2%	51.5%
Croatia	SUPER TALENT	Nova TV	Talent Show	21.3%	43.3%
Cyprus	EUROVISION SONG CONTEST 2016 FINAL (EUROSONG/FINAL)	RIK 1	Variety Show	18.9%	67.1%
Czech Republic	PRAVÝ RYTÍR (THE TRUE KNIGHT)	ČT 1	TV Movie	31.2%	65.0%
Denmark	X FACTOR AFGØRELSEN (X FACTOR/RESULTS)	DR 1	Reality Show	30.1%	72.4%
Estonia	SU NÄGU KÕLAB TUTTAVALT-FINAAL (YOUR FACE SOUNDS FAMILIAR)	TV 3	Variety Show	29.8%	55.0%
Finland	ITSENÄISYYSPÄIVÄ: LINNAN JUHLAT (INDEPENDENCE DAY CELEBRATION)	YLE TV 1	Variety Show	50.3%	88.0%
France	AU RENDEZ-VOUS DES ENFOIRÉS	TF 1	Variety Show	19.9%	49.9%
Germany	FACK JU GÖHTE	Pro 7	Movie	11.8%	27.0%
Greece	AL TSANTIRI NEWS	Alpha	News	18.4%	40.2%
Hungary	A NAGY DUETT (CELEBRITY DUETS)	TV 2	Game Show	17.6%	35.9%
Ireland	THE LATE LATE TOY SHOW	RTÉ ONE	Talk Show	38.4%	76.2%
Italy	66 FESTIVAL DI SANREMO (66TH SANREMO MUSIC FESTIVAL)	Rai 1	Variety Show	21.7%	48.7%
Latvia	ES MILU TEVI, LATVIJA!	TV 3	Variety Show	13.8%	31.1%
Lithuania	EUROVIZIJOS DAINŲ KONKURSAS 2016. FINALAS (EUROSONG/FINAL)	LRT	Variety Show	20.2%	61.5%
Macedonia	SE ILI NESHTO (DEAL OR NO DEAL)	Sitel	Game Show	18.9%	42.9%
Netherlands	EUROVISIE SONGFESTIVAL/FINALE (EUROSONG/FINAL)	NPO 1	Variety Show	27.5%	64.5%
Norway	MESTERNES MESTER (ETERNAL GLORY)	NRK 1	Reality Show	33.0%	69.1%
Poland	ROLNIK SZUKA ZONY (FARMER WANTS A WIFE)	TVP 1	Reality Show	14.4%	31.7%
Portugal	A UNICA MULHER II	TVI	Telenovela	18.7%	35.1%
Romania	ROMANII AU TALENT (GOT TALENT)	Pro TV	Reality Show	20.1%	37.1%
Russia	NEW YEARS ADDRESS BY RUSSIAN PRESIDENT PUTIN	Perviy	Special Event	13.2%	29.8%
Serbia	DNEVNIK 2 RTS (NEWS 19:30)	RTS 1	News	23.4%	44.2%
Slovakia	TŘI OŘÍŠKY PRO POPELKU (THREE WISHES FOR CINDERELLA)	Markíza	Movie	18.7%	35.6%
Slovenia	NA ŽARU ODDAJA	Pop TV	Comedy Show	35.5%	66.4%
Spain	Y AHORA,TODOS CON LA EUROCOPA	Tele 5	Magazine-Sports	15.5%	44.0%
Sweden	KALLE ANKA OCH HANS VÄNNE (A DISNEY CHRISTMAS GIFT)	SVT 1	TV Movie	39.3%	95.9%
Switzerland (G)	GOTTHARD	SRF 1	TV Movie	21.5%	47.1%
Switzerland (F)	19H30	RTS Un	News	21.2%	61.5%
Switzerland (I)	VIA COL VENTI (GONE WITH THE WIND)	TSI 1	Game Show	24.9%	52.8%
Turkey	SURVIVOR (EXPEDITION ROBINSON)	TV 8	Reality Show	12.1%	27.2%
Ukraine	NOVOGODNEE POZDRAVLENIE PREZIDENTA UKRAINY (PRESIDENTIAL NEW YEAR'S ADDRESS)	1+1	Special Event	15.2%	32.8%
United Kingdom	THE GREAT BRITISH BAKE OFF	BBC 1	Reality Show	26.9%	52.7%
China	2016 CCTV SPRING FESTIVAL EVENING	CCTV 1	Special Event	7.0%	16.7%
India	PREM RATAN DHAN PAYO	STAR GOLD	Movie	27.0%	25.2%
Japan	THE 67TH NHK KOHUTA UTA GASSEN	NHK G	Music Show	27.5%	52.9%
United States	88TH ACADEMY AWARDS	ABC	Variety Show	12.0%	31.5%

[1]*No single programme was featured in the top programmes list*
Note: In this table sports events are excluded.
Source: EURODATA TV, local institutes – reproduction forbidden, all rights reserved by MÉDIAMÉTRIE

Key Tables.

Best Recurrent Series 2016

Country	Name	Channel	Genre	Runs	Rating in %	Share in %
					all individuals	
Austria	DIE ROSENHEIM COPS	ORF 2	Crime	41	10.1%	29.9%
Belarus	PAUTINA-9	NTV Belarus	Crime	[1]	12.8%	29.8%
Belgium North	EIGEN KWEEK	ÉEN	Drama	7	32.2%	61.0%
Belgium South	NCIS, ENQUETES SPECIALES (NAVY NCIS)	RTL TVI	Crime	15	11.9%	29.9%
Bulgaria	TVOIAT MOI JIVOT (PARAMPARÇA)	BTV	Drama	[1]	20.8%	49.1%
Croatia	TUDI ZIVOT (PARAMPARÇA)	Nova TV	Drama	83	16.5%	38.1%
Cyprus	DIDYMA FEGGARIA	ANT 1	Drama	[1]	15.4%	34.5%
Czech Republic	ORDINACE V RUŽOVÉ ZAHRADE	Nova	Drama	[1]	16.2%	37.7%
Denmark	BADEHOTELLET (THE BEACH HOTEL)	TV 2	Drama	6	29.8%	64.7%
Estonia	n.a.[2]	n.a.[2]	n.a.[2]	n.a.[2]	n.a.[2]	n.a.[2]
Finland	KORPELAN KUJANJUOKSU	YLE TV 1	Comedy	[1]	20.3%	53.2%
France	SAM	TF 1	Comedy	6	12.4%	29.2%
Germany	TATORT	ARD	Crime	46	11.1%	23.5%
Greece	MPRISKO	Antenna	Daily Soap	185	11.7%	28.4%
Hungary	BARÁTOK KÖZT (AMONG FRIENDS)	RTL Klub	Daily Soap	249	10.4%	22.4%
Ireland	REBELLION	RTÉ One	Drama	5	15.3%	38.3%
Italy	IL COMMISSARIO MONTALBANO	Rai 1	Crime	8	14.7%	33.2%
Latvia	UGUNSGRĒKS	TV 3	Daily Soap	[1]	10.5%	24.8%
Lithuania	n.a.[2]	n.a.[2]	n.a.[2]	n.a.[2]	n.a.[2]	n.a.[2]
Macedonia	CRNATA ROZA (KARAGÜL)	Sitel	Drama	[1]	26.4%	48.1%
Netherlands	DIVORCE	RTL 4	Drama	12	14.4%	28.1%
Norway	NOBEL - FRED FOR ENHVER PRIS	NRK 1	Drama	7	16.5%	39.1%
Poland	M JAK MILOŚĆ (L FOR LOVE)	TVP 2	Daily Soap	78	17.5%	38.6%
Portugal	A UNICA MÚLHER	TVI	Telenovela	248	14.7%	30.2%
Romania	LAS FIERBINTI	Pro TV	Sitcom	[1]	15.3%	30.3%
Russia	MAZHOR II (SILVER SPOON II)	Perviy	Drama	6	8.1%	25.4%
Serbia	SELO GORI, A BABA SE CESLJA	RTS 1	Comedy	[1]	24.8%	55.2%
Slovakia	HORNÁ DOLNÁ	Markíza	Sitcom	[1]	17.0%	37.5%
Slovenia	GORSKI ZDRAVNIK (DER BERGDOKTOR)	Pop TV	Drama	[1]	18.6%	43.6%
Spain	EL PRÍNCIPE	Tele 5	Drama	8	9.8%	24.4%
Sweden	MORDEN I MIDSOMER (MIDSOMER MURDERS)	SVT 1	Crime	6	17.4%	54.0%
Switzerland (G)	DER BESTATTER	SRF 1	Crime	6	13.4%	37.5%
Switzerland (F)	CLEM	RTS Un	Comedy	8	9.2%	25.6%
Switzerland (I)	CASTLE	TSI 1	Crime	27	13.0%	29.8%
Turkey	DIRILIS: ERTUGRUL	TRT 1	Drama	31	9.2%	21.7%
Ukraine	LESTNITSA V NEBESA	Channel Ukraine	Drama	[1]	11.8%	31.8%
United Kingdom	CALL THE MIDWIFE	BBC 1	Drama	61	16.6%	34.2%
China	HERO DOG III	HUNAN TV SAT	Comedy	[1]	4.2%	12.7%
India	NAAGIN	Colors	Drama	[1]	3.4%	12.0%
Japan	ASA GA KITA	NHK G	Drama	78	12.7%	43.0%
United States	THE BIG BANG THEORY	CBS	Sitcom	31	6.7%	19.2%

[1]Only the best episode is taken into account; [2]No recurrent series was featured in the top programmes list
Source: EURODATA TV, local institutes – reproduction forbidden, all rights reserved by MÉDIAMÉTRIE

Key Tables.

TV Equipment

Country	Population *in 000*	Households *in 000*	TV HH *in %*	TV HH *in 000*	Multiset *in % of TVHH*	DVD Player/ Recorder *in % of TVHH*	DVR *in % of TVHH*	Blu-ray Player *in % of TVHH*
Austria	8 740	3 866	95.6%	3 693	46.1%	55.3%	18.0%	17.1%
Belarus	9 570	3 859[1]	98.1%	3 797	53.2%	n.a.	n.a.	n.a.
Belgium	11 311	4 693	96.3%	5 264	n.a.	52.3%	n.a.	26.6%
Bulgaria	7 154	2 743	99.1%	2 926	52.3%	14.0%	n.a.	n.a.
Croatia	4 191	1 481	99.2%	1 507	24.6%	67.0%	2.0%	13.3%
Cyprus	848	315	95.9%	302[2]	n.a.	n.a.	n.a.	n.a.
Czech Republic	10 554	4 690	95.9%	4 312	39.1%	57.6%	n.a.	11.3%
Denmark	5 707	2 387	89.8%	2 384	43.3%	69.2%	n.a.	30.0%
Estonia	1 316	573	94.6%	561	31.2%	39.2%	29.3%	n.a.
Finland	5 487	2 641	95.8%	2 495	41.3%	54.2%	33.8%	19.0%
France	66 760	29 139	97.4%	28 383	n.a.	67.4%	n.a.	22.0%
Germany	82 176	40 537	94.5%	38 320	43.3%	54.3%	10.8%	24.9%
Greece	10 784	4 411	99.1%	4 372	n.a.	50.1%	n.a.	16.4%
Hungary	9 831	4 149	95.0%	3 890	n.a.	64.5%	61.8%	15.1%
Ireland	4 725	1 728	91.0%	1 578	43.0%	81.4%	60.0%	16.0%
Italy	60 666	25 797	95.9%	23 412	60.7%	85.6%	15.0%	21.9%
Latvia	1 969	836	93.8%	741	36.0%	37.0%	n.a.	n.a.
Lithuania	2 889	1 392	95.4%	1 209	56.4%	15.5%	36.1%	n.a.
Luxembourg	576	234	99.2%	232	n.a.	n.a.	n.a.	n.a.
Macedonia	2 100	564	99.7%	560	n.a.	n.a.	n.a.	n.a.
Netherlands	16 979	7 723	96.5%	7 451	47.5%	45.1%	14.7%	19.6%
Norway	5 211	2 349	97.9%	2 300	n.a.	66.2%	n.a.	49.6%
Poland	37 967	14 225	95.7%	13 008	21.2%	42.9%	21.1%	14.0%
Portugal	10 341	4 080	99.6%	3 869	n.a.	74.8%	n.a.	17.7%
Romania	19 760	7 470	95.2%	6 952	37.9%	2.2%	0.1%	n.a.
Russia	146 500	52 707	99.0%	52 707	n.a.	84.5%	n.a.	27.3%
Serbia	7 076	2 488	98.2%	2 430	39.8%	14.8%	14.0%	n.a.
Slovakia	5 426	1 846	97.6%	1 720	42.6%	53.8%	35.2%	n.a.
Slovenia	2 064	889	95.5%	849	n.a.	n.a.	n.a.	n.a.
Spain	46 529	18 444	98.9%	18 162	49.7%	71.8%	10.9%	15.4%
Sweden	9 851	4 825	92.0%	4 450	n.a.	76.3%	32.0%	21.4%
Switzerland	8 179	3 585	99.0%	3 321	46.8%	72.9%	n.a.	30.7%
Turkey	78 741	22 354	96.9%	21 148	15.2%	0.0%	0.8%	14.8%
Ukraine	42 761	16 574	95.0%	15 011	33.5%	n.a.	n.a.	n.a.
United Kingdom	65 383	28 647	96.2%	26 460	59.3%	78.2%	61.2%	24.2%
Europe	**810 039**	**324 241**	**96.3%**	**307 684**	**42.0%[3]**	**61.3%[4]**	**20.7%[5]**	**22.1%[6]**
EU[7]	**509 901**	**219 761**	**96.0%**	**206 494**	**47.4%[8]**	**61.9%[9]**	**24.0%[10]**	**21.0%[11]**
China	1 373 541	432 729	82.3%	412 981	n.a.	31.1%	n.a.	0.5%
India	1 226 884	2 484 091[12]	62.7%	174 485	n.a.	16.3%	n.a.	0.9%
Japan	126 702	54 166	97.1%	51 291	n.a.	28.6%	n.a.	53.5%
United States	323 995	124 587	98.9%	119 864	n.a.	74.5%	n.a.	42.8%

[1]Census 2009 data; [2]Data from 2015; [3]Weighted average without Belgium, Cyprus, France, Greece, Hungary, Luxembourg, Macedonia, Norway, Portugal, Russia, Slovenia and Sweden; [4]Weighted average without Belarus, Cyprus, Luxembourg, Macedonia, Slovenia and Ukraine; [5]Weighted average without Belarus, Belgium, Bulgaria, Cyprus, Czech Republic, Denmark, France, Greece, Latvia, Luxembourg, Macedonia, Norway, Portugal, Russia, Slovenia and Ukraine; [6]Weighted average without Belarus, Bulgaria, Cyprus, Estonia, Latvia, Lithuania, Luxembourg, Macedonia, Romania, Serbia, Slovakia, Slovenia and Ukraine; [7]Without Malta; [8]Weighted average without Belgium, Cyprus, France, Greece, Hungary, Luxembourg, Portugal, Slovenia and Sweden; [9]Weighted average without Cyprus, Luxembourg and Slovenia; [10]Weighted average without Belgium, Bulgaria, Cyprus, Czech Republic, Denmark, France, Greece, Latvia, Luxembourg, Portugal and Slovenia; [11]Weighted average without Bulgaria, Cyprus, Estonia, Latvia, Lithuania, Luxembourg, Romania, Slovakia and Slovenia; [12]Census 2011 Data.

Source: CIA World Factbook, RTL AdConnect, IHS Markit, EURODATA TV, local institutes – reproduction forbidden, all rights reserved by MÉDIAMÉTRIE.

Key Tables.

Multi-Screen Technology

Country	TV Flat Screen in % of TVHH	TV High Definition in % of TVHH	Connected TV in % of TVHH	PC in % of HH	Tablet PC in % of Pop.	Mobile in % of Pop.[1]	Smartphones in % of Pop.	Broadband in % of HH
Austria	91.5%	87.5%	33.7%	78.4%	43.9%	157.6%	58.2%	63.3%
Belarus	57.2%	55.4%	14.7%	n.a.	n.a.	124.9%	n.a.	n.a.
Belgium	90.5%	87.2%	30.5%	77.2%	44.9%	127.5%	55.9%	77.9%
Bulgaria	61.9%	60.0%	17.6%	58.4%	17.0%	153.3%	53.8%	44.6%
Croatia	59.3%	56.8%	16.3%	80.3%	7.8%	112.5%	64.0%	35.9%
Cyprus	91.3%	87.5%	27.8%	60.3%	n.a.	n.a.	n.a.	86.4%
Czech Republic	81.1%	79.1%	30.5%	80.4%	35.4%	137.8%	56.8%	54.5%
Denmark	90.9%	87.1%	41.1%	85.5%	56.4%	165.4%	80.1%	92.8%
Estonia	82.0%	80.5%	33.1%	73.8%	29.7%	155.6%	59.8%	67.1%
Finland	89.0%	84.8%	33.7%	77.4%	55.2%	182.1%	41.5%	71.9%
France	94.4%	91.4%	36.2%	73.3%	50.4%	110.4%	65.6%	71.1%
Germany	94.1%	92.7%	46.7%	83.1%	43.6%	141.2%	62.6%	72.7%
Greece	88.4%	83.7%	22.6%	77.1%	17.6%	151.2%	57.5%	66.5%
Hungary	76.8%	74.8%	27.2%	77.6%	6.9%	115.6%	60.4%	63.6%
Ireland	89.4%	83.0%	30.7%	79.0%	46.1%	108.9%	72.9%	69.0%
Italy	92.9%	90.3%	33.7%	78.9%	28.1%	136.1%	67.5%	50.5%
Latvia	72.1%	70.2%	26.1%	n.a.	22.3%	138.8%	56.2%	61.1%
Lithuania	67.9%	66.8%	13.6%	66.6%	26.1%	145.5%	53.8%	48.9%
Luxembourg	93.0%	89.6%	47.4%	n.a.	n.a.	132.6%	n.a.	90.4%
Macedonia	66.5%	65.0%	16.8%	71.2%	n.a.	113.5%	n.a.	n.a.
Netherlands	92.6%	89.9%	36.8%	81.3%	48.3%	107.1%	72.4%	84.1%
Norway	95.2%	92.5%	42.9%	85.2%	40.9%	100.1%	81.9%	85.3%
Poland	76.9%	75.3%	29.4%	72.7%	45.6%	138.1%	62.6%	48.5%
Portugal	89.1%	84.7%	24.2%	78.0%	27.2%	163.4%	54.2%	74.6%
Romania	74.7%	73.1%	25.2%	53.5%	n.a.	143.3%	47.2%	58.5%
Russia	77.2%	75.3%	26.7%	71.5%	26.2%	175.0%	52.3%	40.0%
Serbia	75.4%	74.0%	22.0%	61.6%	n.a.	139.5%	n.a.	n.a.
Slovakia	81.6%	79.9%	35.2%	79.6%	39.7%	128.9%	60.0%	65.4%
Slovenia	78.9%	76.7%	28.0%	81.3%	34.4%	107.5%	62.8%	60.8%
Spain	92.6%	89.1%	30.7%	75.5%	34.0%	110.6%	82.7%	64.2%
Sweden	88.4%	85.5%	38.1%	80.2%	45.4%	148.4%	75.4%	76.1%
Switzerland	94.0%	92.0%	38.5%	85.1%	37.0%	129.8%	72.9%	93.4%
Turkey	73.5%	71.7%	23.6%	68.4%	39.2%	96.1%	71.6%	38.0%
Ukraine	44.3%	43.2%	6.3%	52.6%	n.a.	136.3%	36.5%	n.a.
United Kingdom	94.1%	90.2%	35.7%	83.6%	62.5%	128.1%	73.5%	85.4%
Europe	**83.8%**	**81.4%**	**31.1%**	**74.7%[2]**	**38.5%[3]**	**135.7%[4]**	**62.6%[5]**	**61.2%[6]**
EU[7]	**89.7%**	**87.0%**	**35.0%**	**77.7%[8]**	**42.1%[9]**	**131.1%[4]**	**66.0%[10]**	**67.8%**
China	64.7%	64.7%	30.8%	59.6%	28.3%	96.1%	81.5%	48.2%
India	28.2%	31.0%	1.7%	23.2%	11.7%	85.0%	28.4%	6.5%
Japan	95.5%	92.6%	55.3%	79.8%	44.8%	130.0%	53.6%	62.3%
United States	91.5%	92.2%	39.2%	81.8%	66.8%	124.9%	76.7%	81.7%

[1]Figure is calculated on the number of private mobile phone contracts, in reference to the total population. One person can have more than one contract; [2]Weighted average without Belarus, Latvia and Luxembourg; [3]Weighted average without Belarus, Cyprus, Luxembourg, Macedonia, Romania, Serbia and Ukraine; [4]Weighted average without Cyprus; [5]Weighted average without Belarus, Cyprus, Luxembourg, Macedonia and Serbia; [6]Weighted average without Belarus, Macedonia, Serbia and Ukraine; [7]Without Malta; [8]Weighted average without Latvia and Luxembourg; [9]Weighted average without Cyprus, Luxembourg and Romania; [10]Weighted average without Cyprus and Luxembourg.
Source: IHS Markit, local institutes.

Key Tables.

Electronic Audience Measurement

Overview

Country	Population in 000	TV HH in 000	Service	Population Represented by the Panel in %	Launch of People-meter System	Panel Size HH	Interval of Measu-rement
Austria	8 740	3 693	GfK Austria, since 1968	100%	1991	1 628	1 sec
Belarus	9 570	3 797	Real'noe Izmerenie[1], since 2008	73.3%[2]	2010	500	1 min[3]
Belgium North	5 995	2 589	Audimétrie S.A., since 1996	100%	1989	750	1 sec
Belgium South	4 466	2 000	Audimétrie S.A., since 1996	100%	1985	750	1 sec
Bulgaria	7 154	2 926	GARB Audience Measurement Bulgaria, since 2006	100%	2001	1 045	30 sec
Croatia	4 191	1 507	Nielsen Audience Measurement, since 2002	100%	2002	810	1 min
Cyprus	848	302	Nielsen Audience Measurement, since 1998	100%	1998	425	1 min
Czech Republic	10 554	4 312	Nielsen Admosphere, since 2002	100%	1997	1 833	1 sec
Denmark	5 707	2 384	Kantar Gallup, since 1992	100%	1992	1 200	1 min
Estonia	1 316	561	Kantar Emor, since 1990	100%	2003	383	1 min
Finland	5 487	2 495	Finnpanel Oy, since 1975	100%	1987	1 100	1 min[3]
France	66 760	28 383	Médiamétrie, since 1985	100%	1989	5 006	1 sec
Germany	82 176	38 320	GfK Fernsehforschung, since 1985	100%	1985	5 000	1 sec
Greece	10 784	4 372	Nielsen Television Audience Measurement, since 1988	100%	1988	1 406	1 min
Hungary	9 831	3 890	Nielsen Audience Measurement, since 1992	100%	1994	1 120	1 min
Ireland	4 725	1 578	Nielsen TAM, since 1996	100%	1996	1 050	1 min
Italy	60 666	23 412	Auditel/Nielsen TV Audience Measurement, since 1986	100%	1986	5 666	1 min
Latvia	1 969	741	Kantar TNS, since 1993	100%	1999	390[4]	1 min
Lithuania	2 889	1 209	Kantar TNS, since 1995	100%	2000	460	1 min
Macedonia	2 100	560	Nielsen Audience Measurement, since 2007	100%	2008	400	1 min
Netherlands	16 979	7 451	Intomart/GfK & Nielsen Media Research, since 2000	100%	1987	1 220	1 sec
Norway	5 211	2 300	Kantar TNS, since 2000	100%	1992	1 000	1 min
Poland	37 967	13 008	Nielsen Audience Measurement, since 1996	100%	1996	2 002	1 min
Portugal	10 341	3 869	CAEM/GfK, since 2012	100%	1993	1 100	1 min
Romania	19 760	6 952	Kantar Media, since 2012	100%	1998	1 320	1 min
Russia	146 500	52 707	Wciom, since 1994	46.6%[5]	1996	5 000	1 min
Serbia	7 076	2 430	Nielsen Audience Measurement, since 2002	100%	2002	880	1 min
Slovakia	5 426	1 720	TNS Slovakia, since 2004	100%	2004	1 200	1 min[3]
Slovenia	2 064	849	AGB Nielsen Media Research, since 1999	100%	1999	450	1 min
Spain	46 449	18 162	Kantar Media, since 1988	100%	1988	4 496	1 min
Sweden	9 851	4 450	AGB Nielsen Media Research, since 1993	100%	1993	1 350	1 min
Switzerland (G)	5 175	2 367	Kantar Media, since 2013	100%	1985	1 000	1 sec[7]
Switzerland (F)	1 803	796	Kantar Media, since 2013	100%	1985	600	1 sec[7]
Switzerland (I)	339	158	Kantar Media, since 2013	100%	1985	270	1 sec[7]
Turkey	78 741	21 148	TNS/Kantar Media, since 2012	73.0%[6]	1990	4 000	1 min
Ukraine	42 761	15 011	Nielsen Ukraine, since 2014	100%	1998	2 840	1 sec
United Kingdom	65 383	26 460	Kantar Media, since 2010	100%	1981	5 100	1 min
China	1 373 541	412 981	CSM Media Research, since 1997	100%	1999	8 000	1 min
India	1 266 884	174 485	Broadcast Audience Research Council India	n.a.	n.a.	22 000	n.a.
Japan	126 702	51 291	iNEX2 Video Research, since 1962	76.0%	1997	900	1 min
United States	323 995	119 864	The Nielsen Company, since 1950	100%	1987	42 041	1 min

[1]Former name: GEVS; [2]Urban population 4+; [3]1 second is technically possible, but 1 minute data is being used; [4]Only TV households covered; [4]Annual average panel size; [5]Urban population 4+ in cities with 100 000+ inhabitants; [6]Individuals in TV households in cities with a population 5 000+; [7]On the basis of 1 second but the system requires 15 seconds to allocate the signal to a channel

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Panel Information

Country	Foreign Channels	Cable and Satellite Channels	Digital Channels	DTT Channel	Interactive Applications in Digital TV	Time-shifted Viewing Included	Guest Viewing Included
Austria	Yes	Yes	Yes	Yes	Yes[1]	Yes	Yes
Belarus	No	Yes[2]	Yes	No	No	No	No
Belgium North	Yes	Yes	Yes	Yes	n.a.	Yes	Yes
Belgium South	Yes	Yes	Yes	Yes	n.a.	Yes	Yes
Bulgaria	Yes	Yes	Yes	Yes	No	No	No
Croatia	Yes	Yes	Yes	Yes	No	No	No
Cyprus	Yes	Yes	Yes	Yes	No	No	No
Czech Republic	Yes	Yes	Yes	Yes	No	Yes	Yes
Denmark	Yes	Yes	Yes	Yes	No	Yes[3]	Yes
Estonia	Yes	Yes	Yes	Yes	No	Yes	No
Finland	Yes	Yes	Yes	Yes	No	Yes	Yes
France	Yes	Yes	Yes	Yes	n.a.	Yes	Yes
Germany	Yes	Yes	Yes	Yes	No	Yes	Yes
Greece	No	Yes	Yes	Yes	n.a.	No	Yes
Hungary	Yes	Yes	Yes	Yes	No	Yes	No
Ireland	Yes	Yes	Yes	Yes	Yes[4]	Yes	Yes[5]
Italy	No	Yes	Yes	Yes	No	Yes	Yes
Latvia	Yes	Yes	Yes	Yes	No	Yes	No
Lithuania	Yes	Yes	Yes	Yes	No	No	No
Macedonia	Yes	Yes	Yes	Yes	No	No	Yes
Netherlands	Yes	Yes	Yes	Yes	No	Yes	Yes
Norway	Yes	Yes	Yes	Yes	No	Yes	Yes
Poland	Yes	Yes	Yes	Yes	No	No	Yes
Portugal	Yes	Yes	Yes	Yes	No	Yes[7]	No
Romania	Yes	Yes	Yes	Yes	No	Yes	Yes
Russia	Yes	Yes	Yes	Yes	No	No	No
Serbia	Yes	Yes	Yes	Yes	No	No	Yes
Slovakia	Yes	Yes	Yes	Yes	No	Yes[8]	Yes
Slovenia	Yes	Yes	Yes	Yes	n.a.	No	Yes
Spain	No	Yes	Yes	Yes	Yes	Yes	Yes
Sweden	Yes	Yes	Yes	Yes	No	Yes	Yes
Switzerland (G)	Yes	Yes	Yes	Yes	No	Yes	Yes
Switzerland (F)	Yes	Yes	Yes	Yes	No	Yes	Yes
Switzerland (I)	Yes	Yes	Yes	Yes	No	Yes	Yes
Turkey	Yes	Yes	No	No	No	No	Yes
Ukraine	Yes	Yes	Yes	Yes	No	[4]	No
United Kingdom	Yes	Yes	Yes	Yes	Yes	Yes	Yes
China	No	Yes	Yes	Yes	No	No	No
Japan	No	No	Yes	Yes	No	Yes[9]	No
United States	n.a.	Yes	Yes	Yes	Yes[10]	Yes	Yes

[1]Partially; [2]Cable channels only; [3]Viewing on the same day as live (VOSDAL) only; [4]Measured but not included in ratings; [5]Guest viewing included in ratings but not in reach; [6]Started to be measured since February 2016; [7]Started to be measured and included in the ratings since June 2015; [8]Started to be measured from October 2016; [9]Web TV measurement since 2011.
Source: RTL AdConnect, local institutes, EURODATA TV / Médiamétrie Médiamat – reproduction forbidden, all rights reserved by MÉDIAMÉTRIE

Key Tables.

Top Advertisers & Advertising Sectors

TV Share of Media Expenditure / Top 3 Advertisers

Country	TV Share of Media Expenditure	Trend	1	2	3
Austria	29.3%	↗	Ferrero	Procter & Gamble	XXXLutz
Belarus[1]	45.3%	↘	Nestlé	TV Shop	Orimi Trade
Belgium	43.0%	↗	Procter & Gamble	Reckitt & Benckiser	Unilever
Bulgaria	93.0%	↗	Procter & Gamble	Nestlé	Mobiltel
Croatia	82.5%	↗	Agrokor	T-Hrvatski Telekom	VIP
Cyprus[1]	64.3%	↘	Lidl	Alphamega	Carrefour S/M
Czech Republic	52.8%	↗	Procter & Gamble	Henkel	Unilever
Denmark	31.2%	↗	Danske Spil	Bilka	Peugeot
Estonia[1]	29.3%	↘	n.a.	n.a.	n.a.
Finland[1]	21.7%	↘	Veikkaus	Unilever	Procter & Gamble
France	39.0%	↗	Procter & Gamble	Unilever	Ferrero
Germany	48.2%	↗	Procter & Gamble	Ferrero	L'Oréal
Greece	n.a.	n.a.	n.a.	n.a.	n.a.
Hungary	83.5%	↗	Sanofi-Aventis	Procter & Gamble	Reckitt Benckiser
Ireland	33.3%	↘	Procter & Gamble	Sky	Diageo
Italy[1]	63.1%	↗	Procter & Gamble	Ferrero	Barilla
Latvia	45.5%	↘	Rimi	Reckitt Benckiser	Procter & Gamble
Lithuania	79.2%	↗	Tele 2	Procter & Gamble	Studio Moderna
Luxembourg	10.1%	↗	Post Luxembourg	Coca-Cola	Kichechef
Macedonia	48.9%	↘	Procter & Gamble	Coca-Cola	Chipita
Netherlands	56.2%	↗	Unilever	Procter & Gamble	Jumbo
Poland	41.1%	↘	Aflofarm	Lidl	Unilever
Romania[1]	65.5%	↗	Procter & Gamble	Unilever	Reckitt Benckiser
Russia[1]	41.9%	↘	Nestlé	Pepsi Co	Procter & Gamble
Serbia[1]	54.8%	↗	Proton System	Agrokor	Procter & Gamble
Slovakia	59.5%	↘	Slovak Telekom	Orange	Lidl
Spain[1]	40.5%	↗	Procter & Gamble	Reckitt Benckiser	L'Oréal
Sweden	49.5%	↗	Procter & Gamble	Arla Foods	Unilever
Switzerland	32.3%	↘	Procter & Gamble	Ferrero	Unilever
Turkey[1]	51.2%	↗	Unilever	Reckitt Benckiser	Turk Telekom
Ukraine[1]	48.8%	↗	Nestlé	Procter & Gamble	Pharmak
United Kingdom	38.6%	↘	Procter & Gamble	Reckitt Benckiser	Sky
Japan	n.a.	n.a.	n.a.	n.a.	n.a.
United States[1]	37.4%	↘	Procter & Gamble	General Motors	Geico
Europe			**Procter & Gamble**	**Unilever**	**Reckitt Benckiser**

[1]*Net figures*
Source: Local institutes, gross figures

Top 3 Advertising Sectors

Country	1	2	3
Austria	Food	Cosmetics, Pharmaceuticals	Home & Garden
Belarus	Soft Drinks	Cosmetics, Perfumery, Body & Hair Care	TV, Communication, Mobile, Press
Belgium	Culture, Tourisme, Loisirs	Alimentation	Beauty, Hygiene
Bulgaria	Pharmaceuticals	Food	Cosmetics
Croatia	Retailers	Food	Communications, Telecommunications
Cyprus	Stores, Shops	Services	Financial Services
Czech Republic	Other Processing Industry	Foods, Drinks	Cross-Section Categories
Denmark	Cars	Mobile Communications	Fast Moving Consumer Goods
Estonia	n.a.	n.a.	n.a.
Finland	Retail	Food	Pharmaceutical Products & Medicines
France	Food	Beauty, Hygiene	Automotive, Transports
Germany	Retail & Mail-Order	Cosmetics & Toiletries	Food
Greece	n.a.	n.a.	n.a.
Hungary	Medicinal Products	Food	Trade
Ireland	Retail	Household Services	Food
Italy	Food	Automotive	Telecommunication
Latvia	Retail In General	Remedies	Financial Institutions, Services
Lithuania	Retail	Remedies	Mobile Communication
Luxembourg	Transport	Household Equipment	Retail
Macedonia	Medicaments & Vitamins	Beers	Soft Drinks Sparkling
Netherlands	Retail	Food	Personal Care
Poland	Pharmaceutical Products, Medicine	Food	Retail
Romania	Pharmaceuticals & Health	Food	Beverages
Russia	Pharmaceuticals	Food	Retail
Serbia	Food, Non-Alcoholic Beverages	Pharmaceuticals	Cosmetics
Slovakia	Banking, Insurance, Financial Services	Telecommunication	Food
Spain	Food	Beauty	Retail
Sweden	Retailers	Financial Advertising	Food, Beverage, Tobacco
Switzerland	Food	Personal Hygiene, Cosmetics	Beverages
Turkey	Food	Communication	Cosmetics & Personal Care
Ukraine	Pharmaceuticals	Food	Alcohol
United Kingdom	Food	Entertainment & Leisure	Finance
Japan	n.a.	n.a.	n.a.
United States	Automobile	Financial	Retail
Europe	**Food**	**Retail**	**Pharmaceuticals**

Source: Local institutes, gross figures

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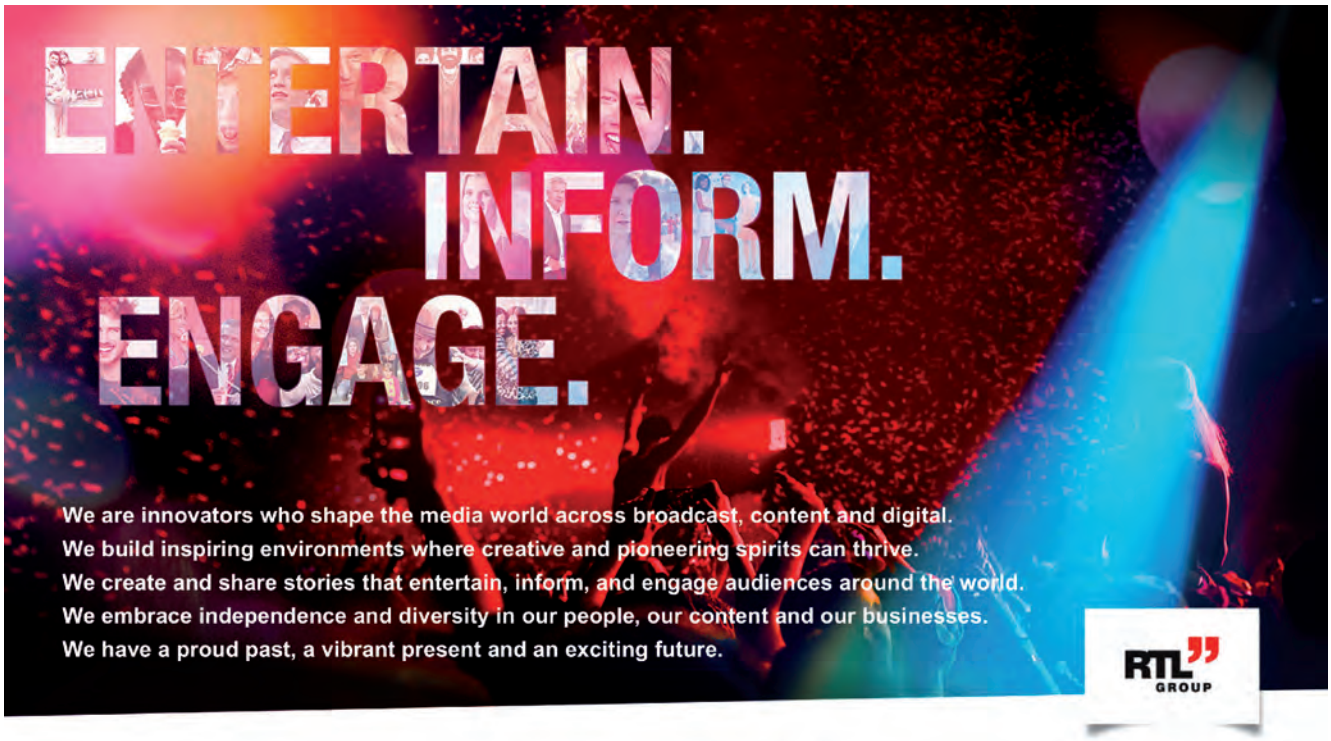

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The television portfolio of Europe's largest broadcaster includes RTL Television in Germany, M6 in France, the RTL channels in the Netherlands, Belgium, Luxembourg, Croatia, Hungary and Antena 3 in Spain. RTL Group's families of TV channels are either the number one or number two in eight European countries. The Group's flagship radio station is RTL in France, and it also owns or has interests in other stations in France, Germany, Belgium, the Netherlands, Spain and Luxembourg.

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Combining the catch-up TV services of its broadcasters, the multi-platform networks BroadbandTV, StyleHaul and Divimove as well as FremantleMedia's more than 280 YouTube channels, RTL Group has become the leading European media company in online video. RTL Group also owns the advanced video ad serving platform SpotX.

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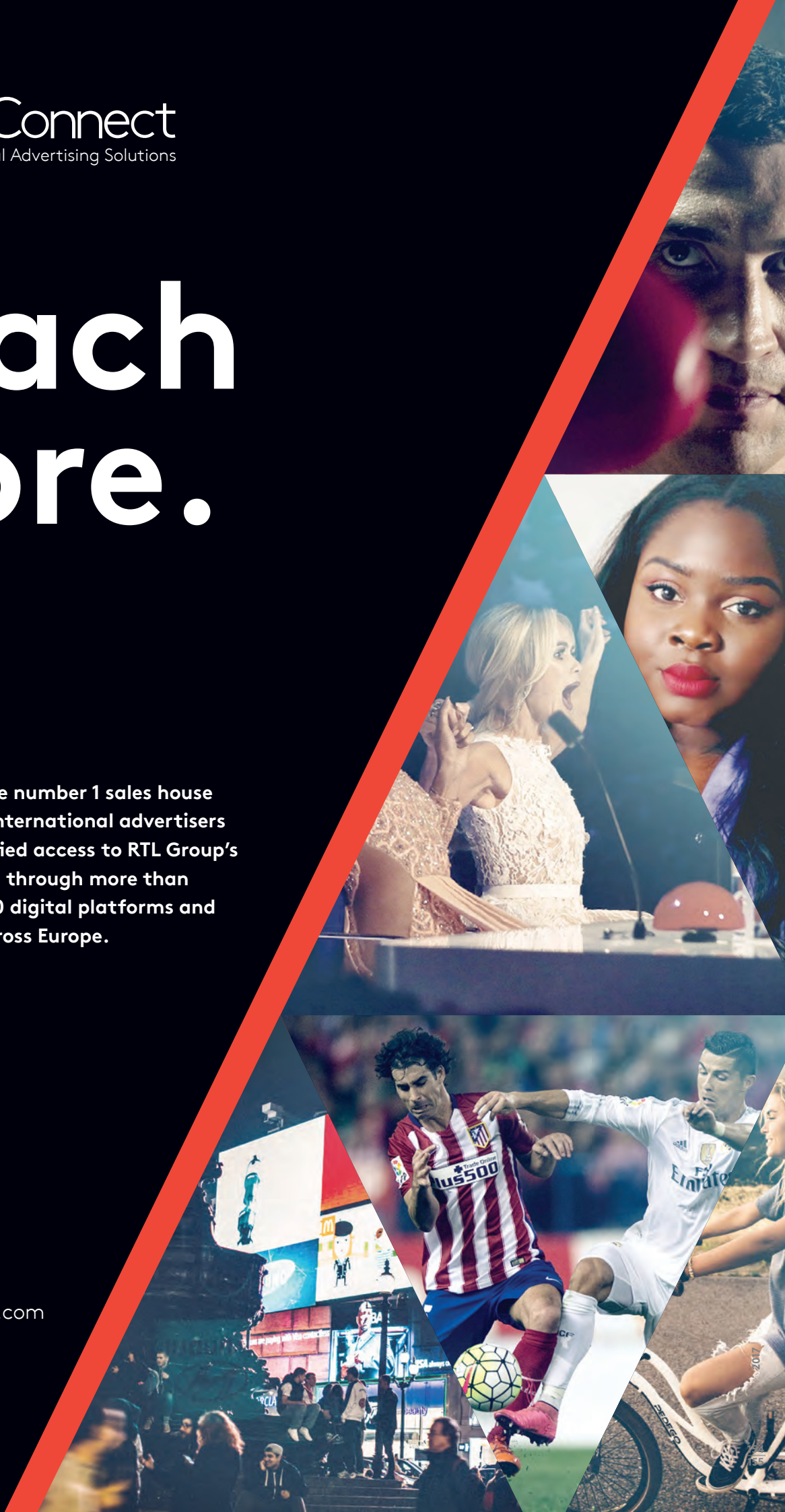

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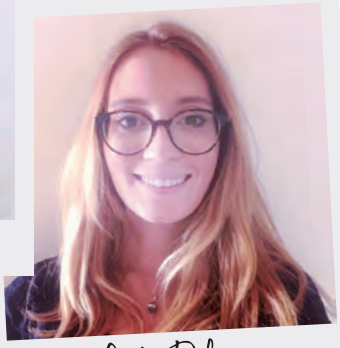
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