

The Global TV Deck

The global proof of TV's power and popularity



The Global TV Deck initiative

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

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

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

TV is brand-safe

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

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

All TV is whitelisted:

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

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



TV is the prime real estate of AV advertising



High completion rates



Robust measurement



Full Screen



Brand safe



Sound on



Shared viewing









Viewed by humans



High quality programming

The global proof of TV's power and popularity

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

Reach

Unbeatable scale and reach

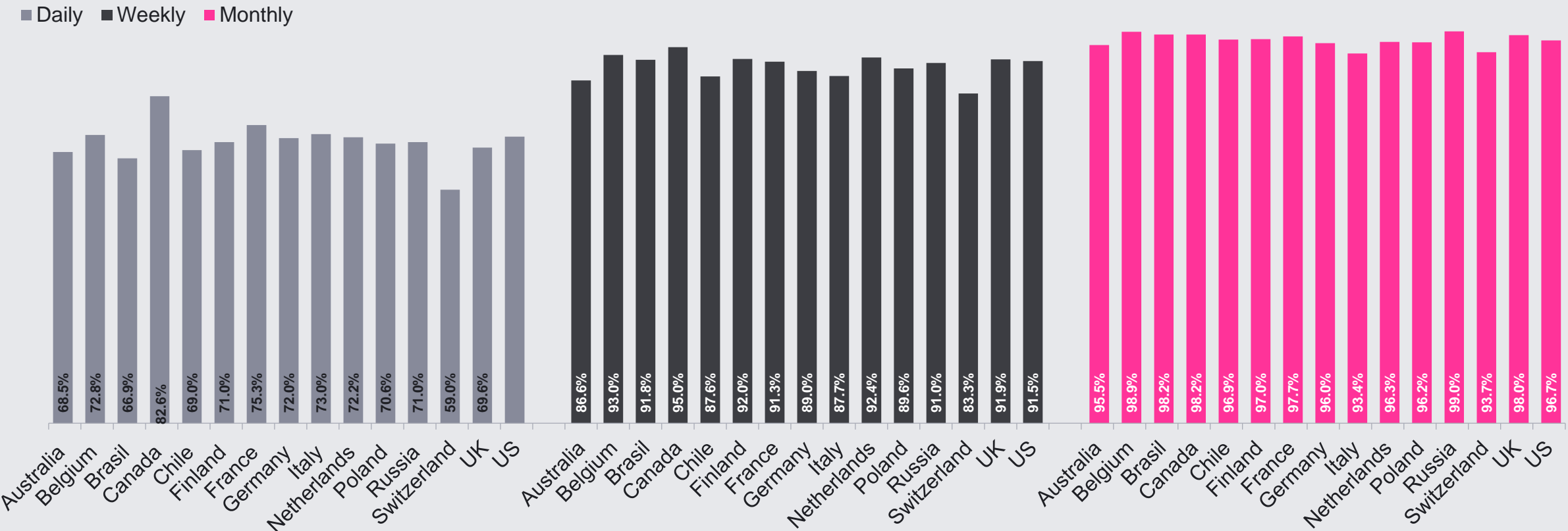


“TV is still really powerful for us. It is still the **most mass reaching audience** and it still works for us”

Marisa Thalberg, CMO of Taco Bell

April 2017

Incomparable reach all over the world

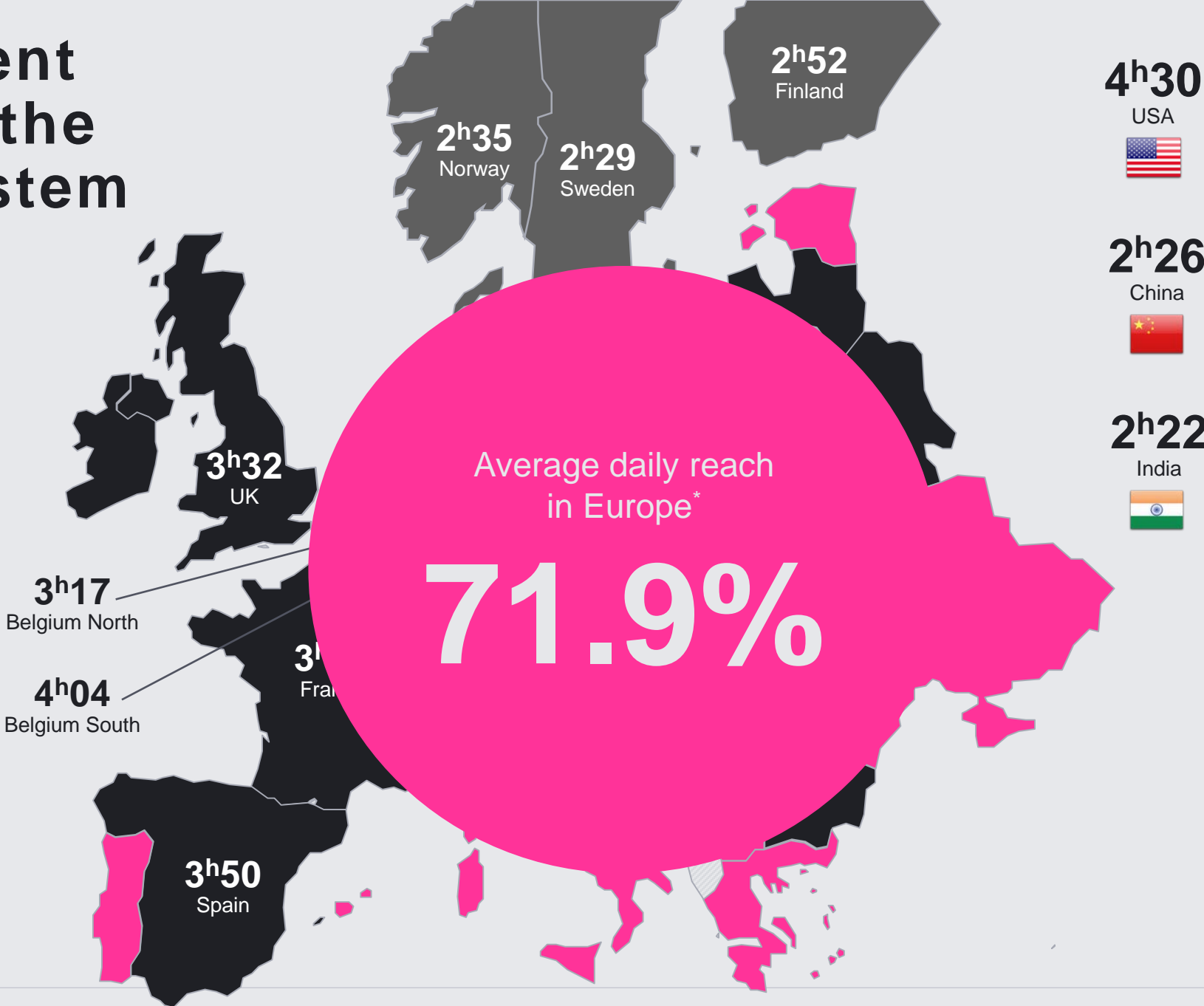


Linear TV is resilient and at the core of the Total Video ecosystem

Average viewing time in Europe and overseas

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

Daily
Viewing Time
4h07
+39 min
vs 1996



Unbeatable daily, weekly and monthly reach

% of the Australian population



68.5%



86.6%



95.5%

Unbeatable daily, weekly and monthly reach

% of the North Belgian population



73.5%



93.2%



98.9%

Unbeatable daily, weekly and monthly reach

% of the South Belgian population



71.9%



92.7%



98.9%

Unbeatable daily, weekly and monthly reach

% of the Brazilian population



66.9%



91.8%



98.2%

Unbeatable daily, weekly and monthly reach

% of the Canadian population



82.6%



95.0%



98.2%

Unbeatable daily, weekly and monthly reach

% of the Chilean population



69.0%



87.6%



96.9%

Unbeatable daily, weekly and monthly reach

% of the Colombian population



52.5%



83.2%



95.1%

Unbeatable daily, weekly and monthly reach

% of the Czech population



71.5%



90.0%



95.9%

Unbeatable daily, weekly and monthly reach

% of the Finnish population



71.0%



92.0%



97.0%

Unbeatable daily, weekly and monthly reach

% of the French population



75.3%



91.3%



97.7%

Unbeatable daily, weekly and monthly reach

% of the German population



72.0%



89.0%



96.0%

Unbeatable daily, weekly and monthly reach

% of the Irish population



65.6%



89.0%



96.3%

Unbeatable daily, weekly and monthly reach

% of the Italian population



73.0%



87.7%



93.4%

Unbeatable daily, weekly and monthly reach

% of the Mexican population



56.5%



86.7%



96.5%

Unbeatable daily, weekly and monthly reach

% of the Dutch population



72.2%



92.4%



96.3%

Unbeatable daily, weekly and monthly reach

% of the Peruvian population



49.5%



79.9%



93.2%

Unbeatable daily, weekly and monthly reach

% of the Polish population



70.6%



89.6%



96.2%

Unbeatable daily, weekly and monthly reach

% of the Russian population



71.0%



91.0%



99.0%

Unbeatable daily, weekly and monthly reach

% of the Slovenian population



73.2%



89.3%



90.8%

Unbeatable daily, weekly and monthly reach

% of the Spanish population



73.6%



91.4%



97.1%

Unbeatable daily, weekly and monthly reach

% of the Swiss population



59.0%



83.3%



93.7%

Unbeatable daily, weekly and monthly reach

% of the British population



69.6%



91.9%



98.0%

Unbeatable daily, weekly and monthly reach

% of the Ukrainian population



70.5%



91.3%



98.0%

Unbeatable daily, weekly and monthly reach

% of the American population



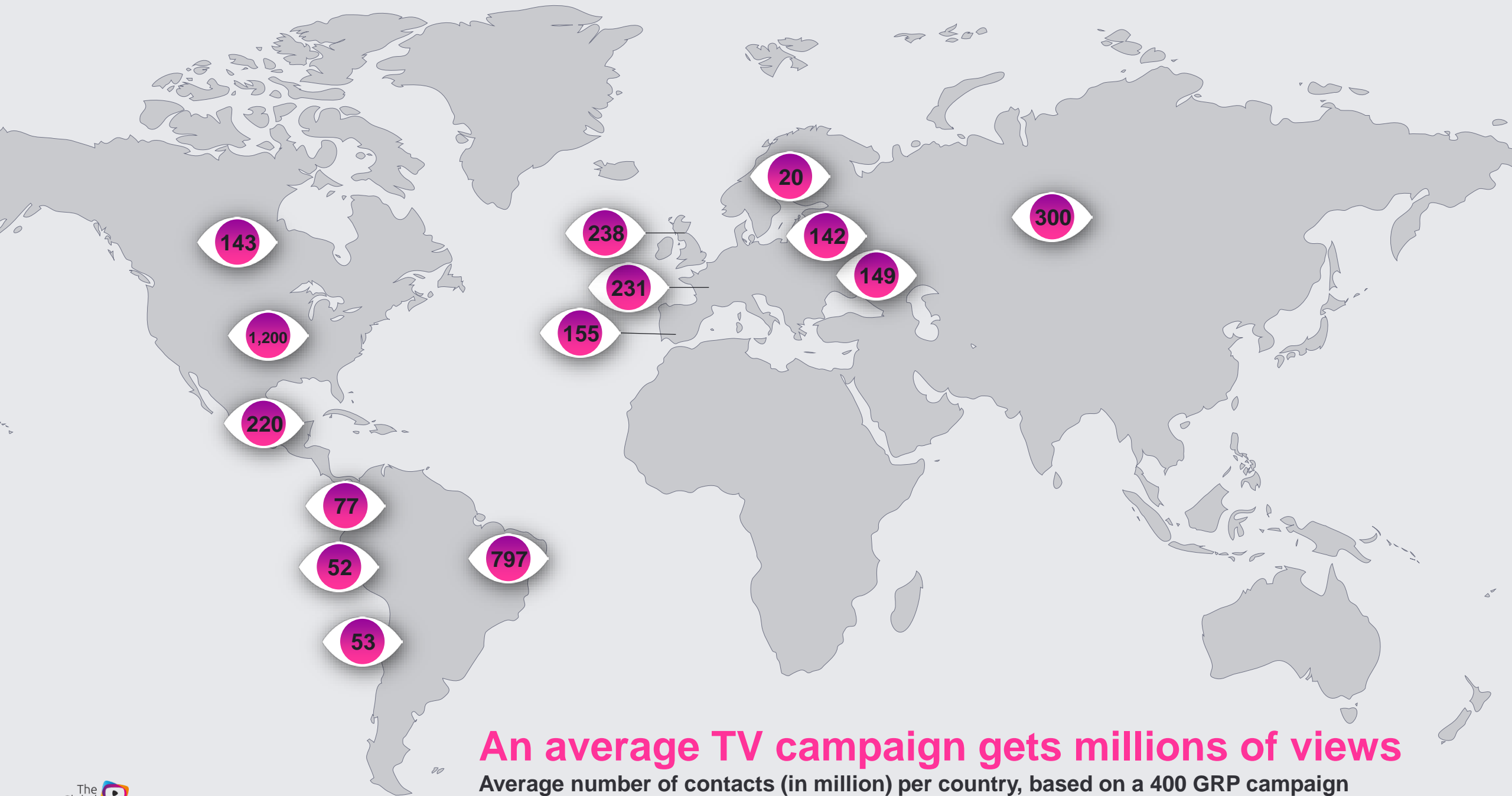
72.4%



91.5%



96.7%



An average TV campaign gets millions of views

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

An average broadcast
TV campaign in
North Belgium
gets:



Million views



An average broadcast
TV campaign in
South Belgium
gets:



Million views



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



Million views

*Base: 400 GRP. Source: Kantar Ibope Media – MW Telereport – Complet PNT. June 2016.
Viewers from Atlas Globo Universe: 199,426,843. Actual Figure: 797,707,372*



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

143

Million views

Base: 400 GRP. Source: Based on Numeris' population estimates for the 2016-2017 Broadcast Year (August 29, 2016 – August 27, 2017) . Individuals 2+

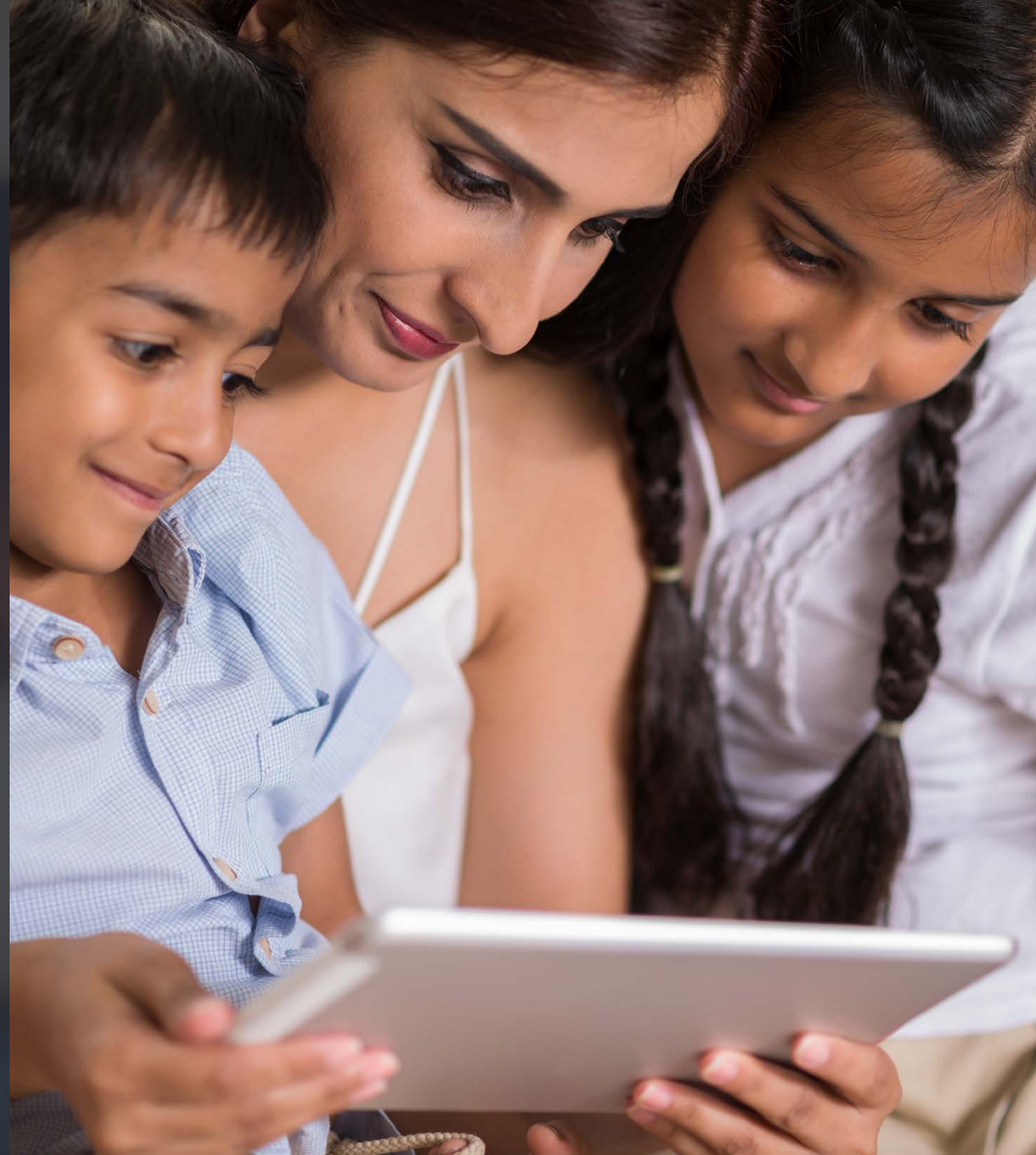


An average
broadcast TV campaign
in **Chile**
gets:



Million views

Base: 400 GRP. Source: Kantar Ibope Media, 2016. TV Data Population 4+: 13,381,914
Actual Figure: 53,527,656



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



Million views



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



Million views



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



Million views



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



Million views



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

16

Million views



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



Million views



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



Million views

Base: 400 GRP. Source: Nielsen IBOPE México. June 2016 / 7am-12am. Population 4+ 55,241,320
Actual Figure: 220,965,280



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



Million views



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



Million views

*Base: 400 GRP. Source: TV Data 8.0 (Kantar Ibope Media) 2016. Target: Total (Lima + 6 cities)
Population 3+ 13,040,397. Actual Figure: 52,017,588*



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

142

Million views

Base: 400 GRP. Source: Nielsen Audience Measurement Poland, 2016, All individuals 4+.



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



Million views



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



Million views

Base: 400 GRP. Source: AGB Nielsen, Total individuals. Q1 2017. Actual figure: 7,538,917



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



Million views



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



Million views

Base: 400 GRP. Source: Mediapulse TV panel (MediaWizard), D-CH + F-CH, March 2016, Adults 15+



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



Million views



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



Million views



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

1.2

Billion views

Base: 400 GRP. Source: Nielsen Universe Estimates 2017/2018, P2+ Population: 304,500,000



Resilience

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



“TV still works, obviously, but how we plug it with digital is becoming more and more important. You can’t separate digital from what happens on air.”

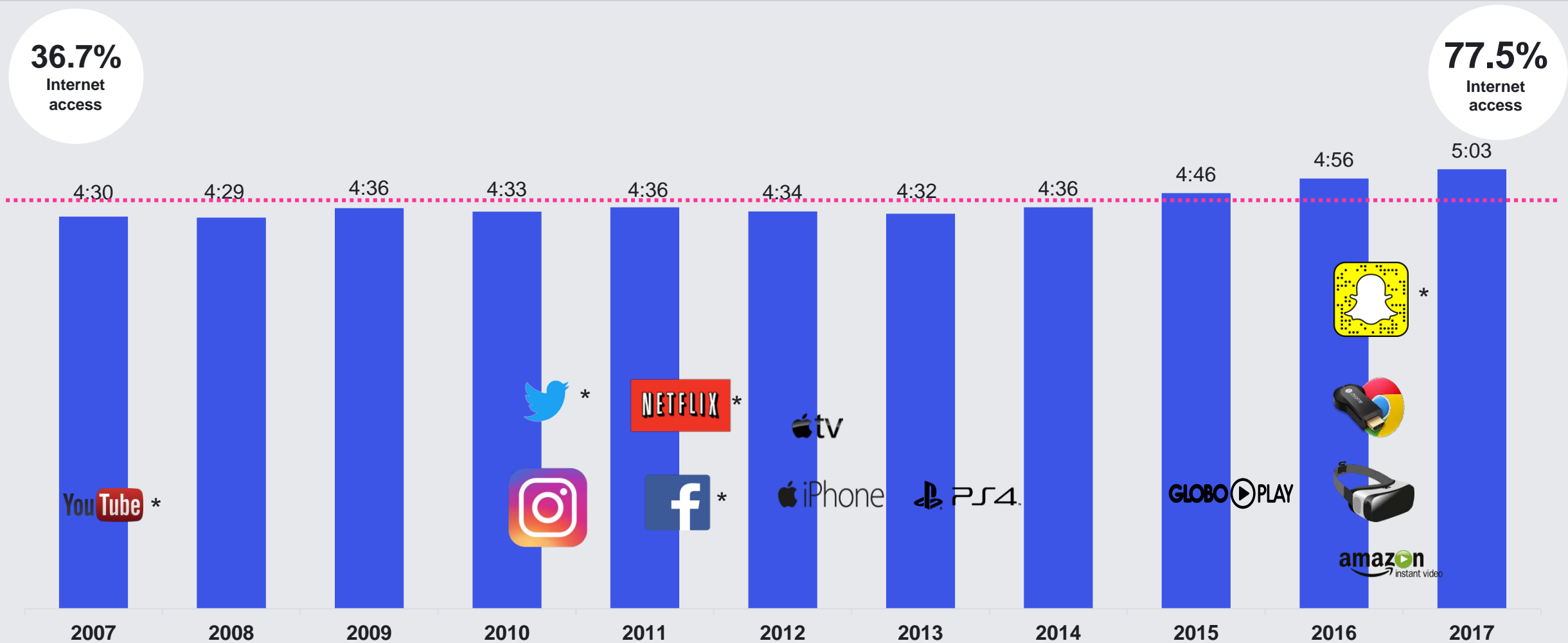
Seth Kaufman, CMO of Pepsi North America Beverages

October 2016

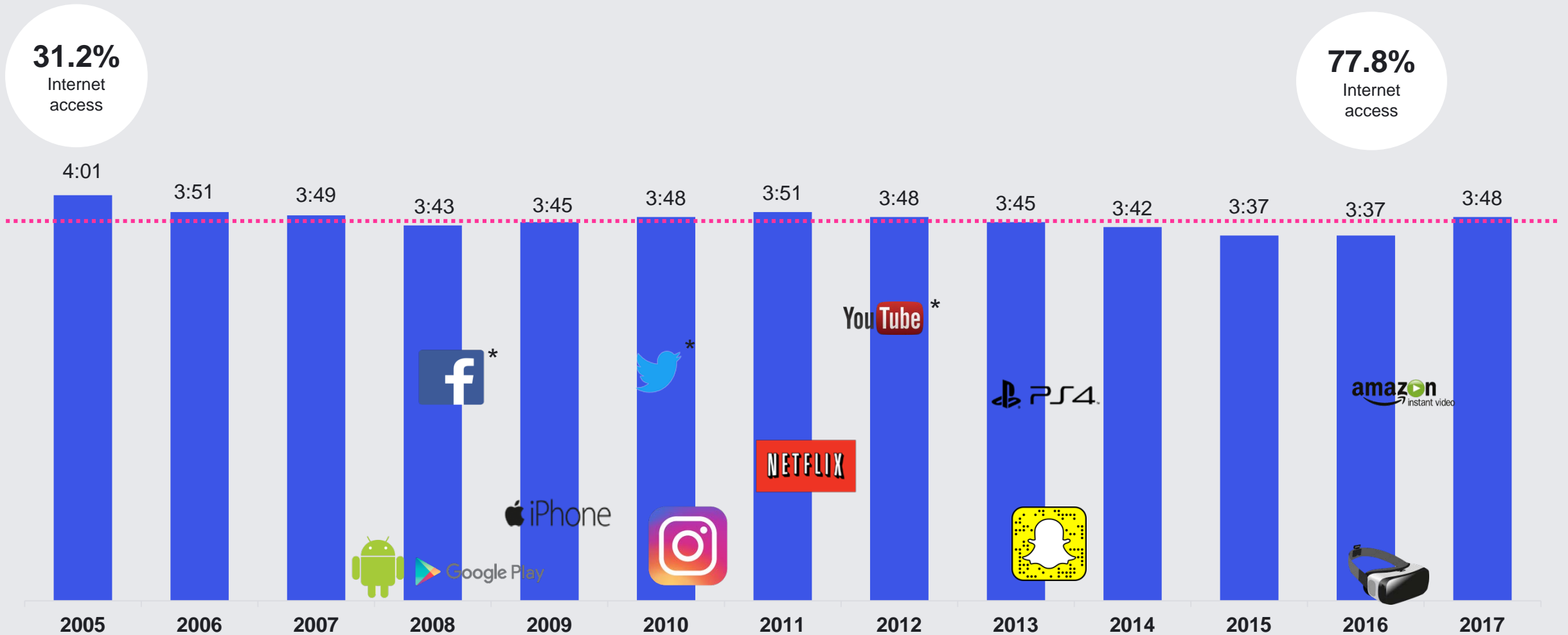
**Despite a decade of
potential disruptions,
TV viewing on a TV set
has remained
remarkably stable**



Hours of TV viewed on a TV set per day

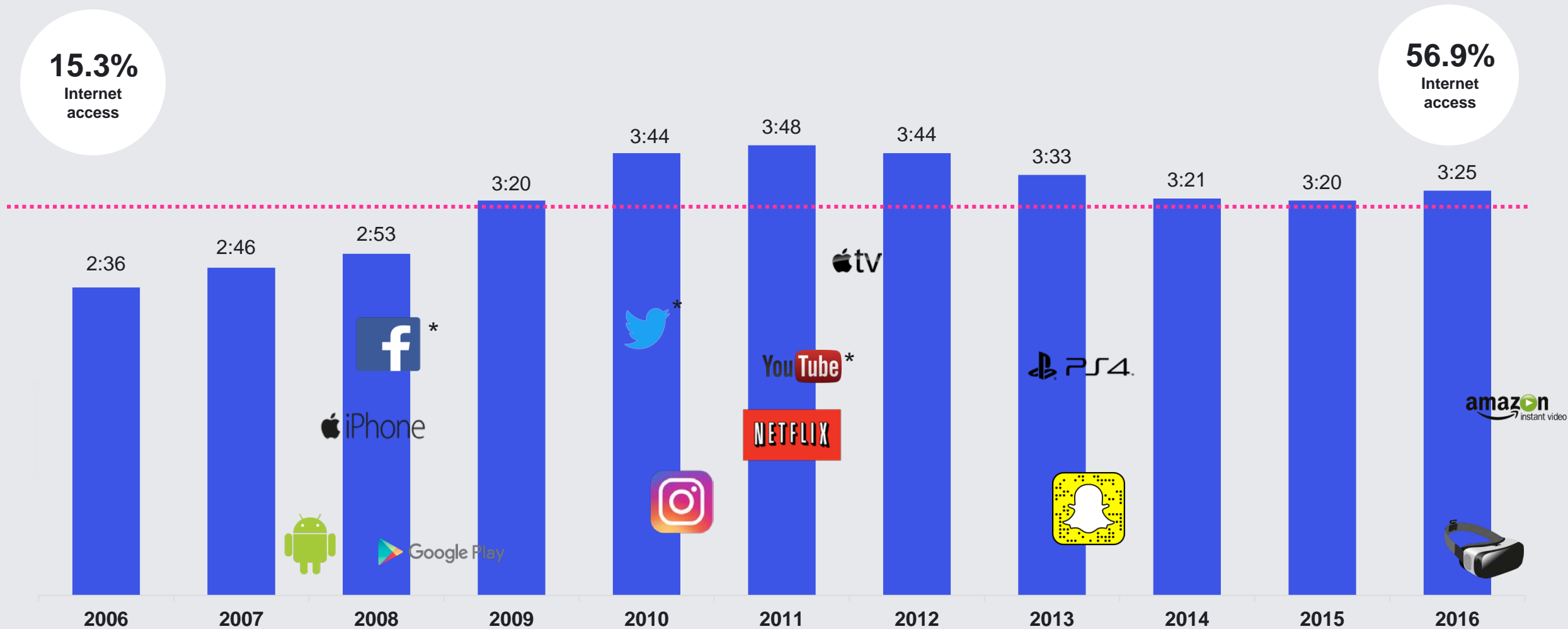


Hours of TV viewed on a TV set per day



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

Hours of TV viewed on a TV set per day



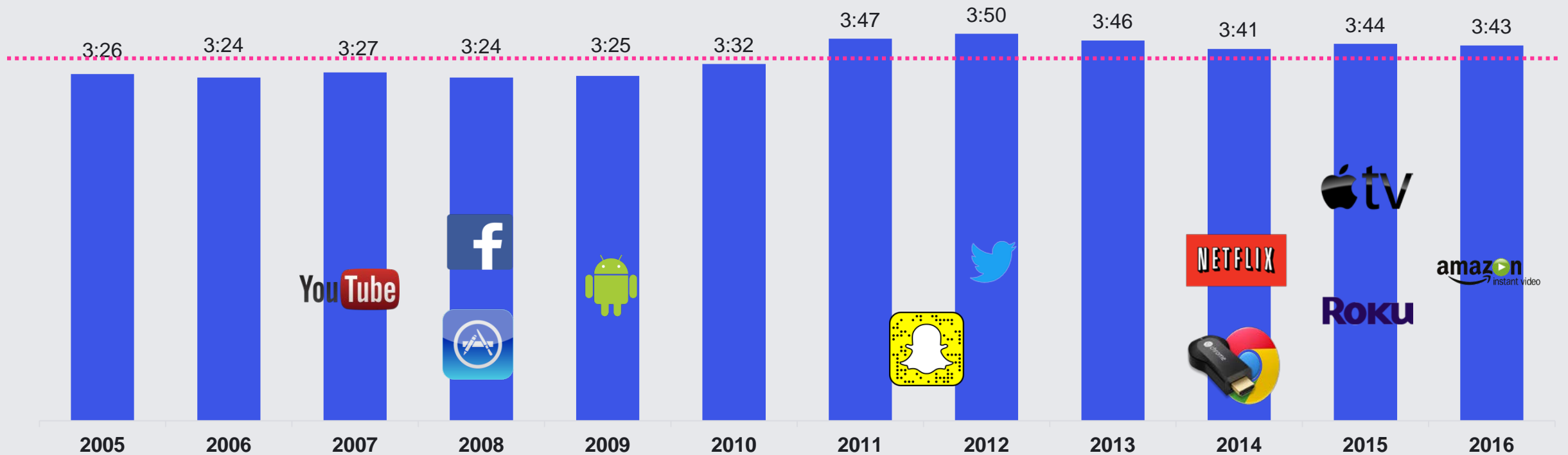
Hours of TV viewed on a TV set per day

43%

Internet
access

77%

Internet
access



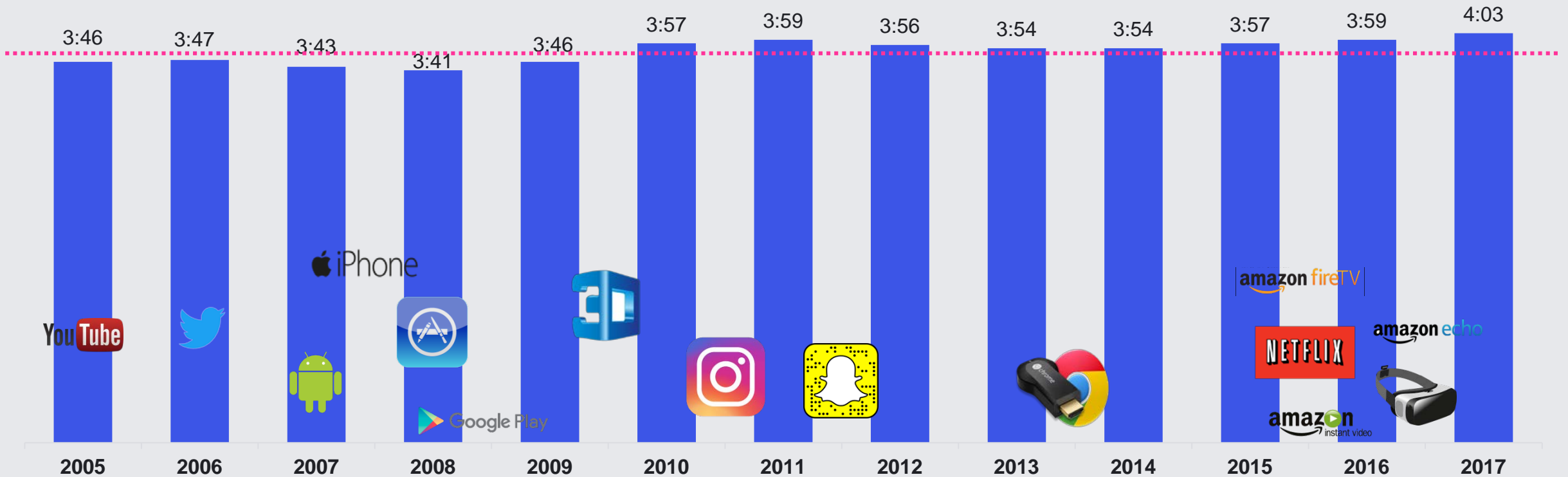
Hours of TV viewed on a TV set per day

55%

Internet
access

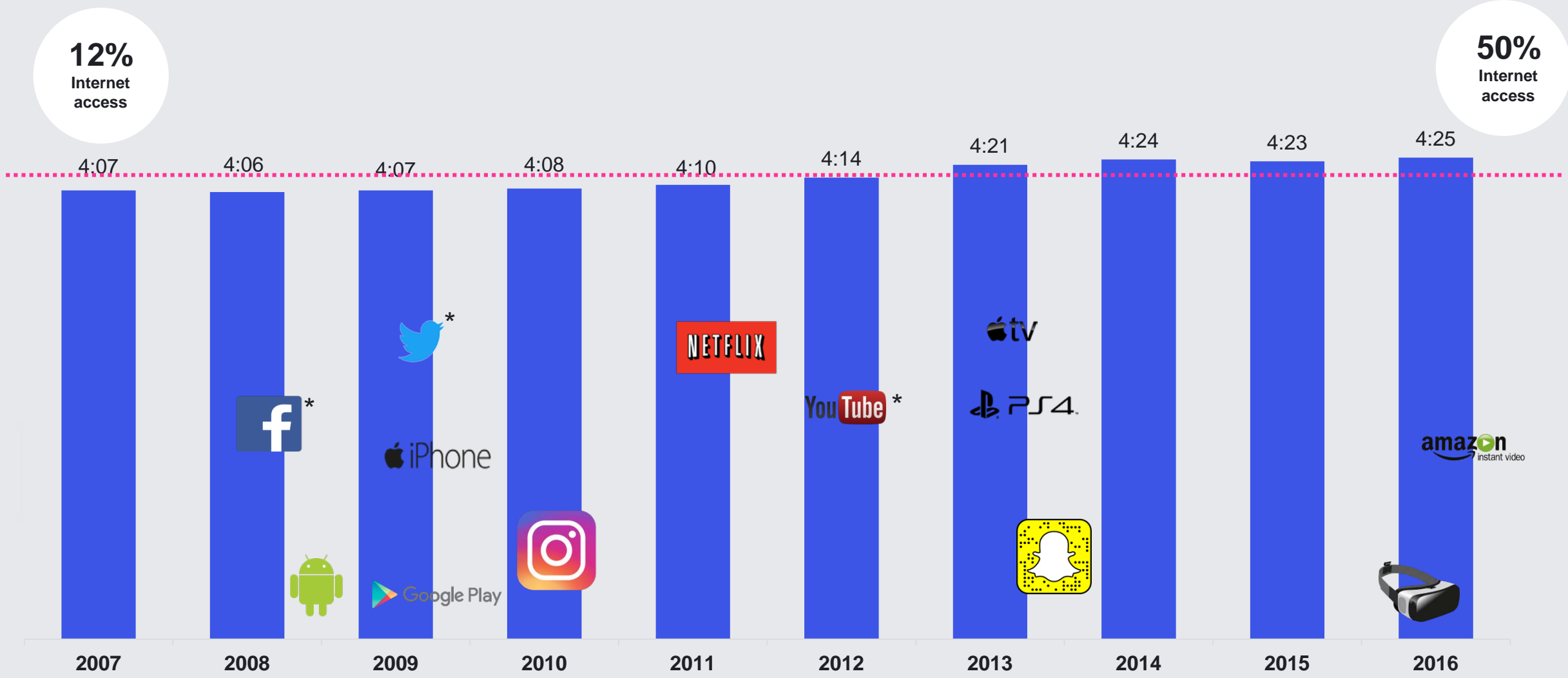
78%

Internet
access



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

Hours of Broadcast TV viewed on a TV set per day



12%
Internet
access

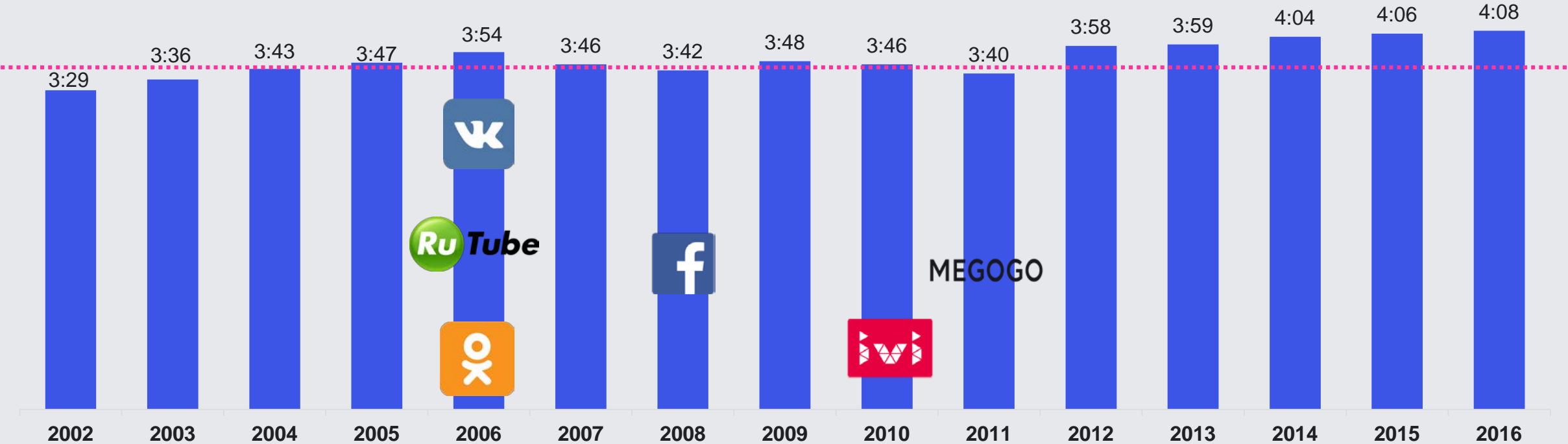
50%
Internet
access

The pink line represents the average time spent (04:15)

Hours of TV viewed on a TV set per day

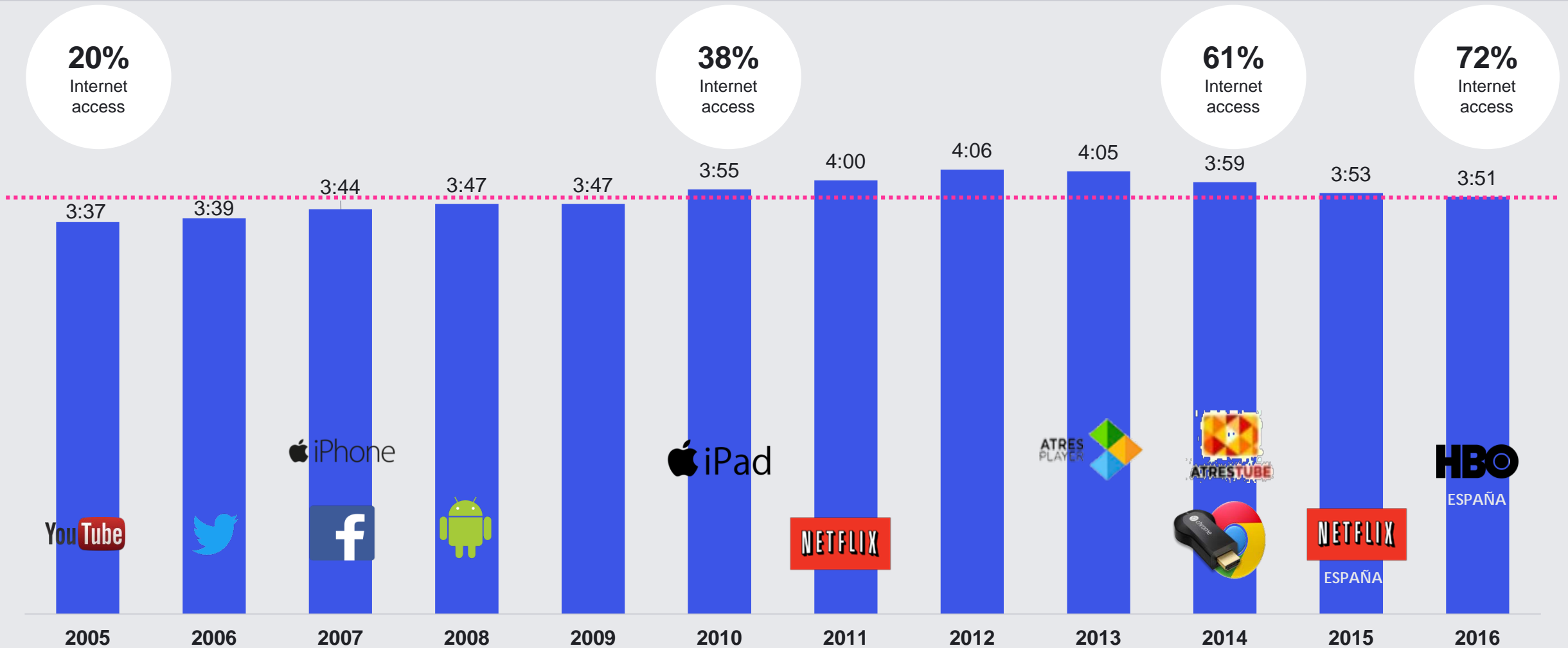
5%
Internet
access

74%
Internet
access



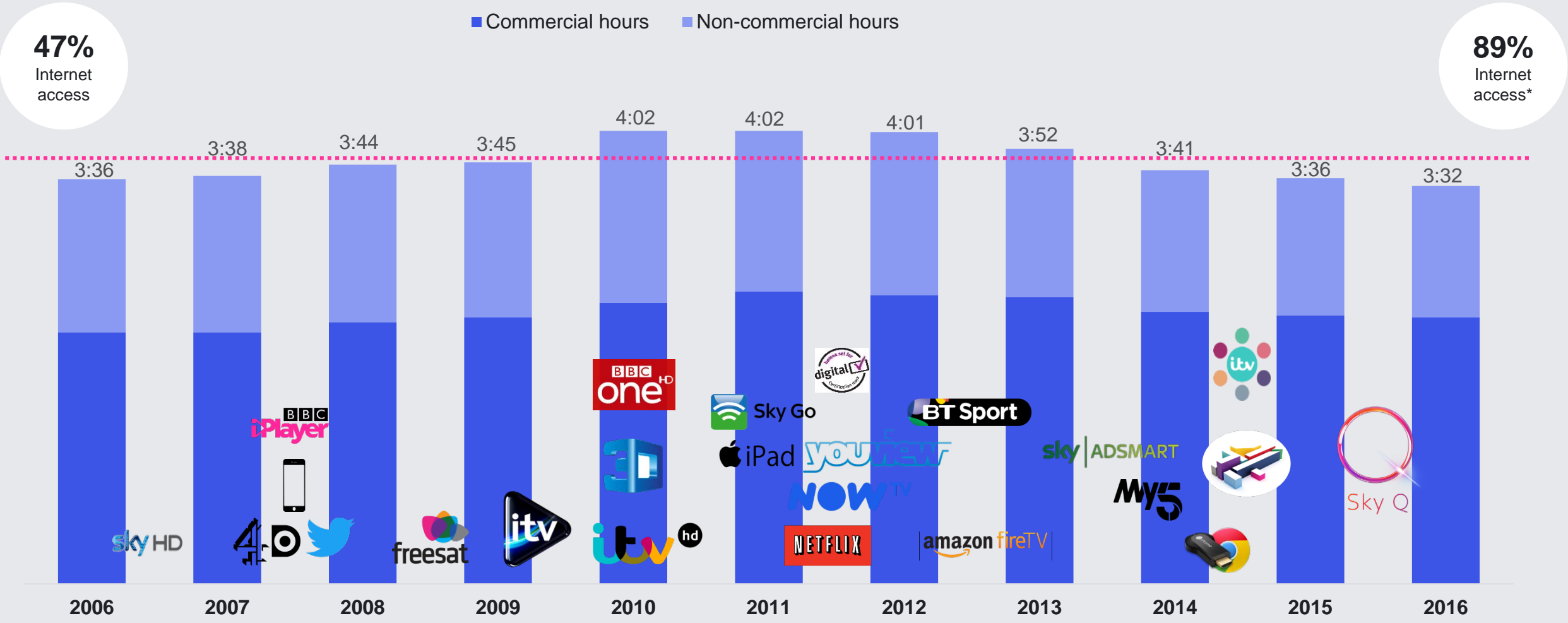
The pink line represents the average time spent (03:44)

Hours of TV viewed on a TV set per day



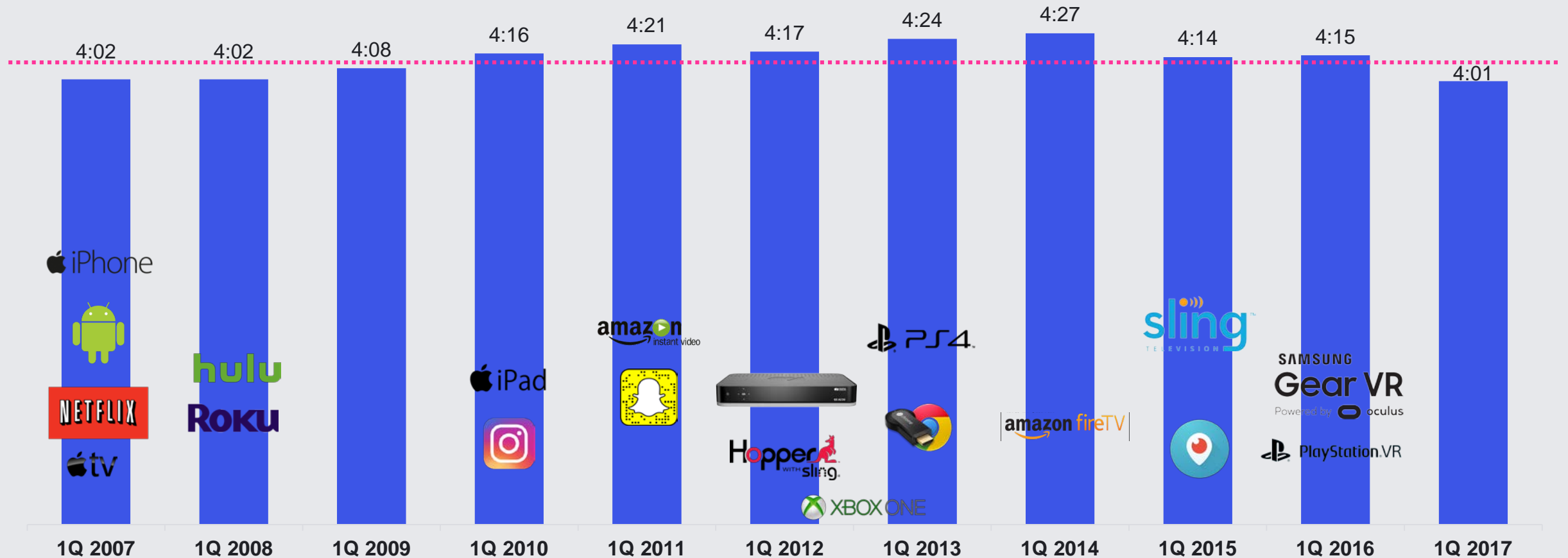
The pink line represents the average time spent (03:51)

Hours of TV viewed on a TV set per day



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

Hours of TV viewed on a TV set per day



The pink line represents the average time spent (04:13)

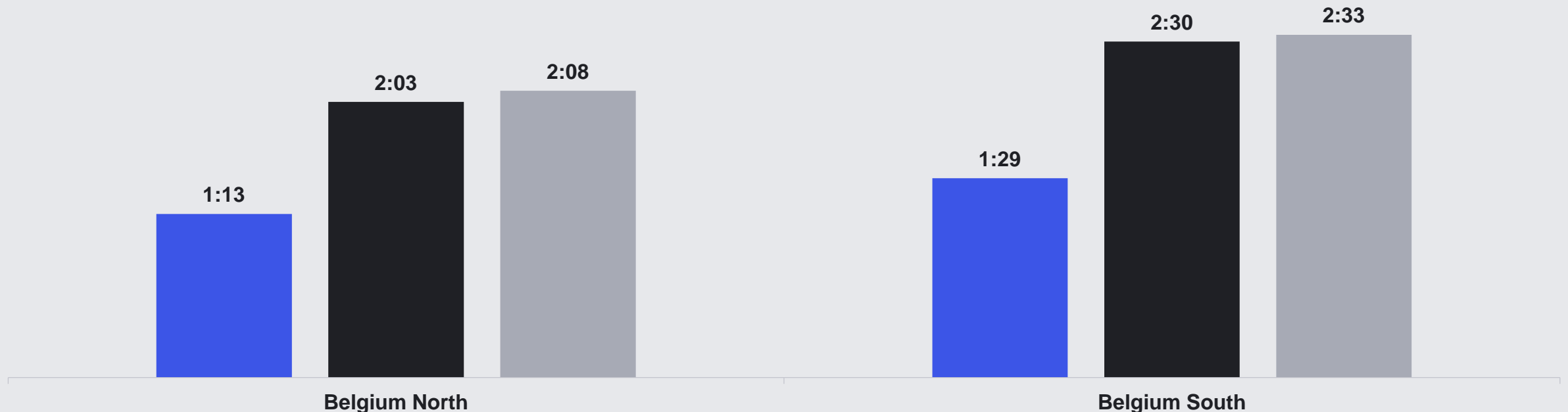
**Today's younger
generation is tomorrow's
heavy TV viewers**



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

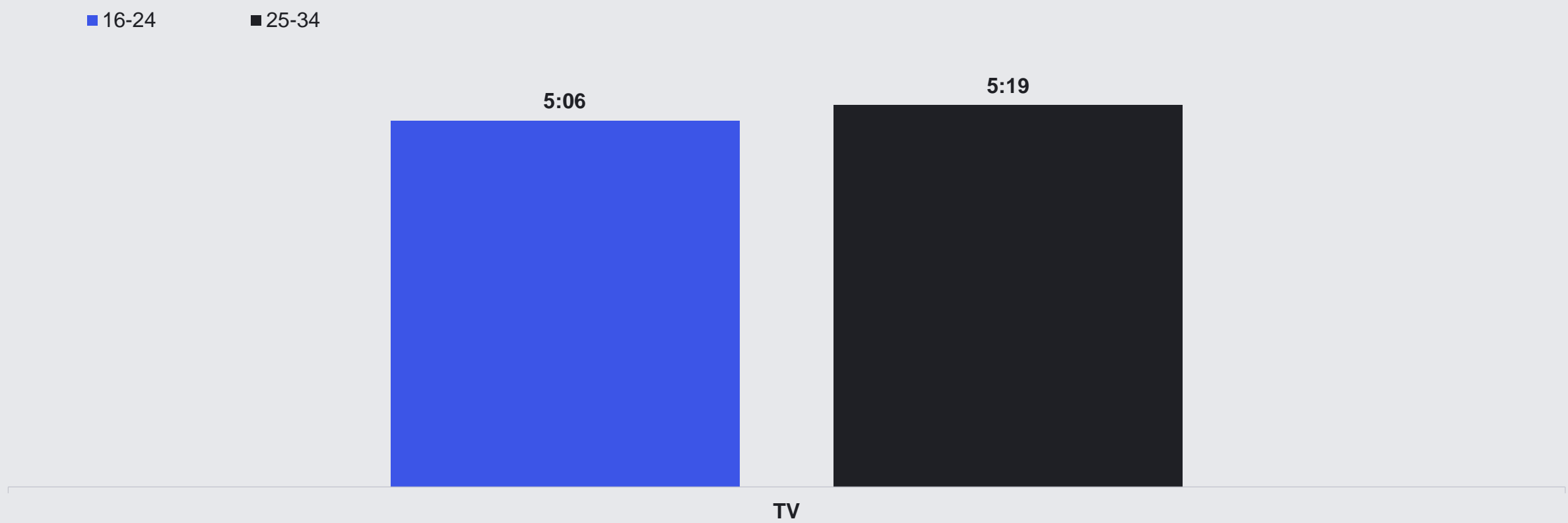
Average hours viewed per day

■ 15-24 ■ 25-34 ■ 25-34 with children



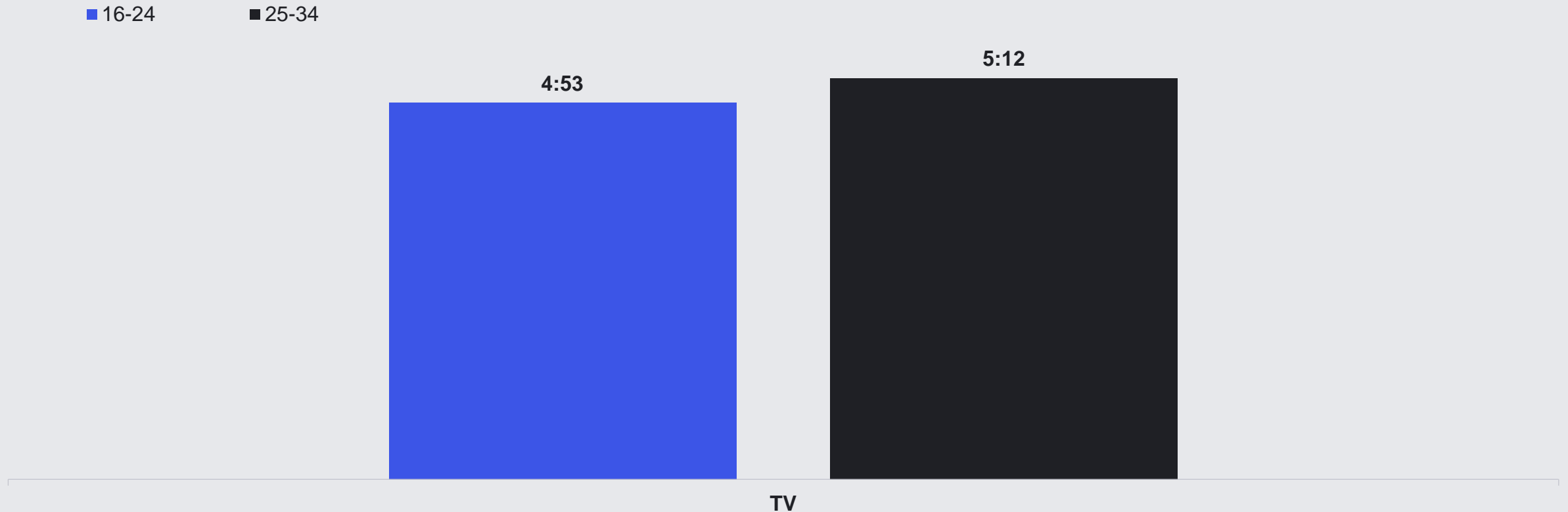
Brazilian Millennials' Broadcast TV viewing increases as they get older

Average hours viewed per day



Chilean Millennials' TV viewing increases as they get older

Average hours viewed per day



Colombian Millennials' TV viewing increases as they get older

Average hours viewed per day

■ 16-24

■ 25-34

2:20

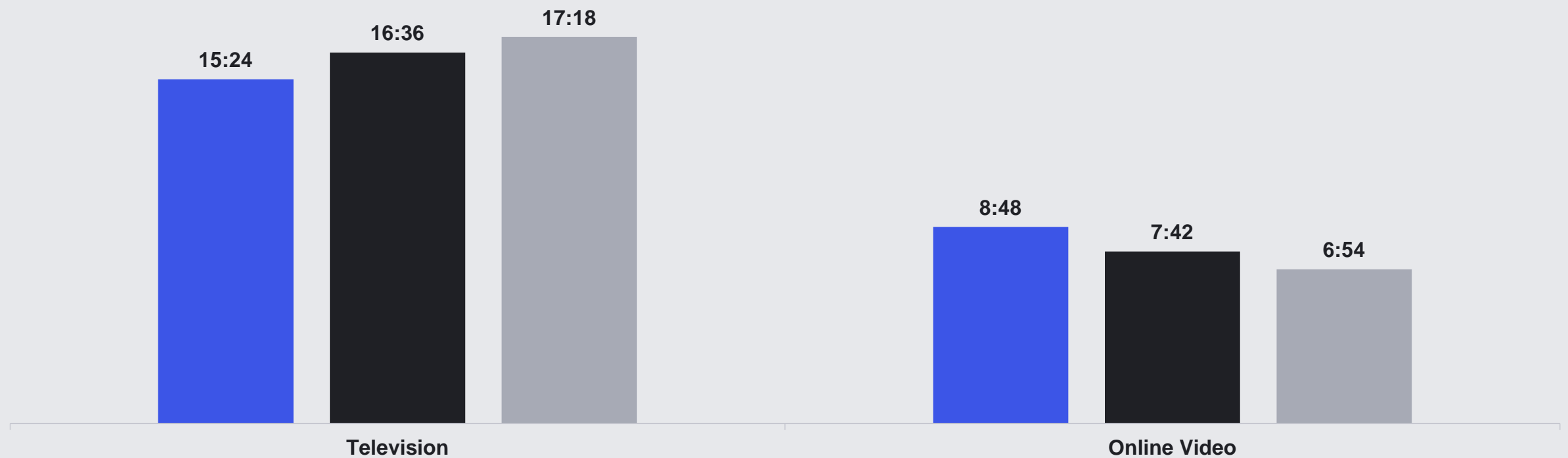
2:49

TV

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

Average hours viewed per week

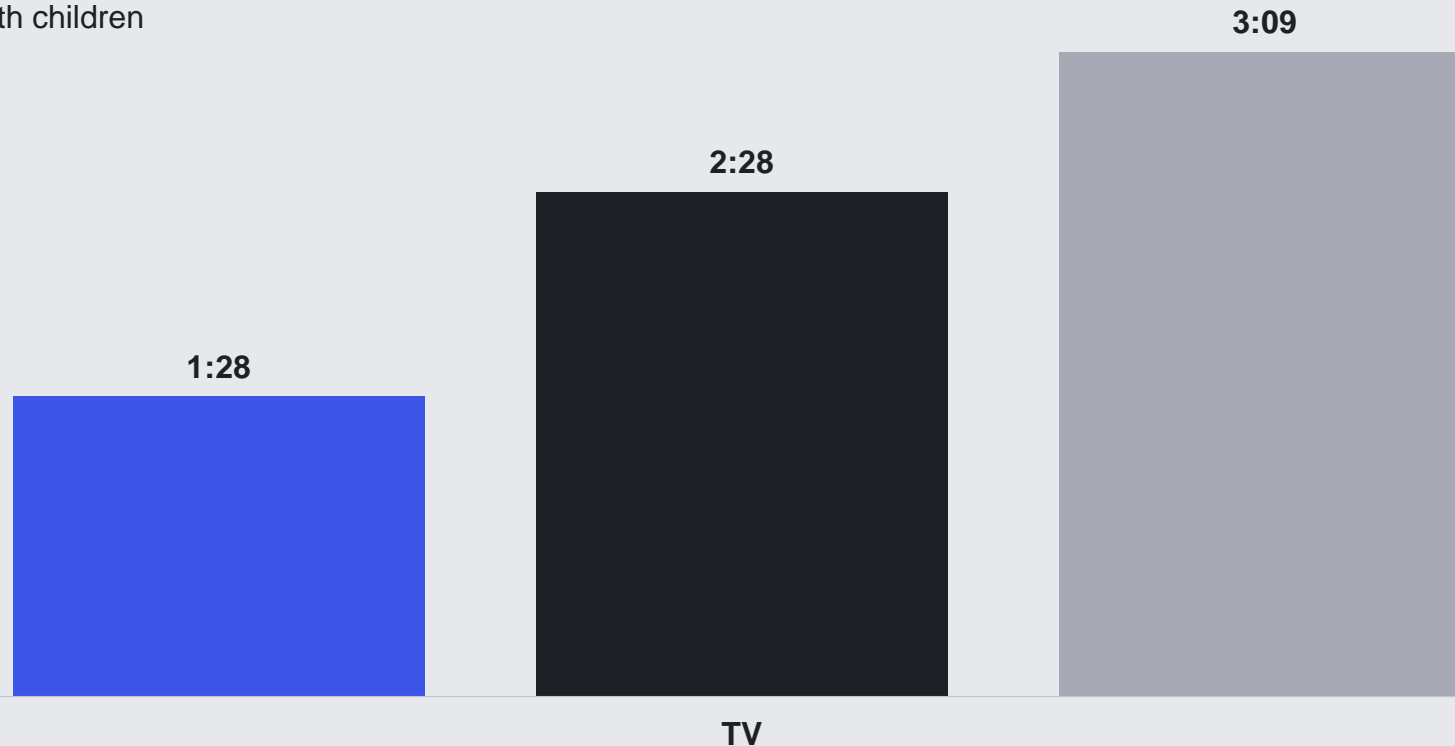
■ 16-19 ■ 20-24 ■ 25-34 (with children in the household)



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

Average hours viewed per day

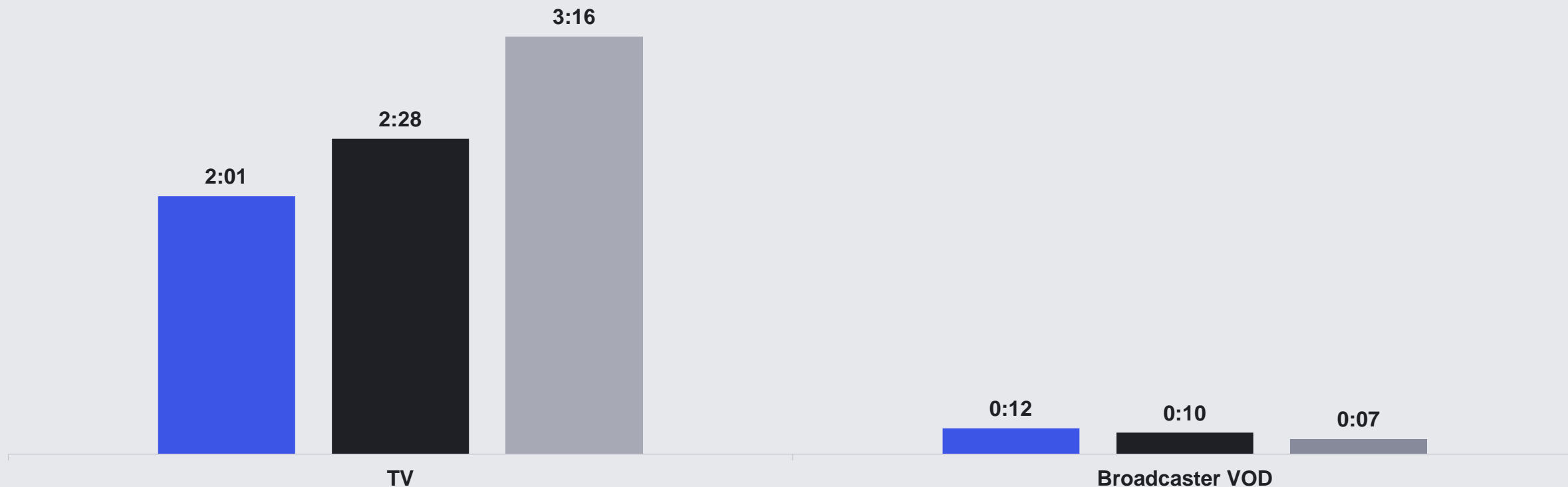
■ 15-24 ■ 25-34 ■ 25-34 with children



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

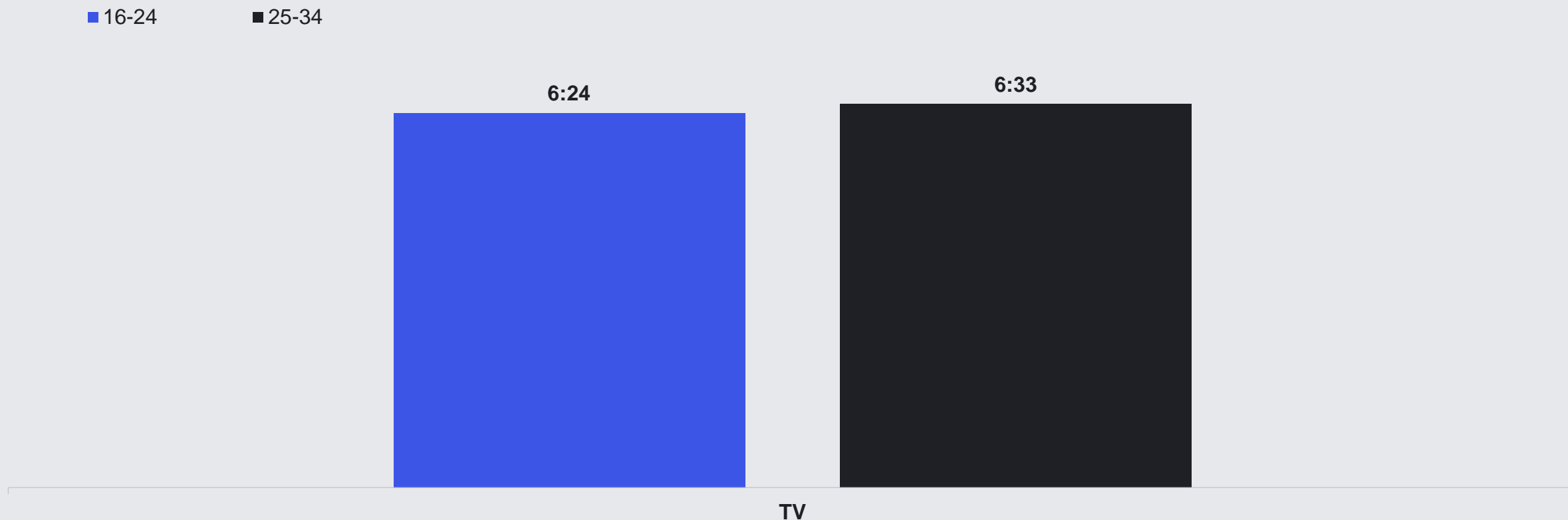
Average hours viewed per day

■ 16-24 ■ 25-34 ■ 25-34 with children



Peruvian Millennials' TV viewing increases as they get older

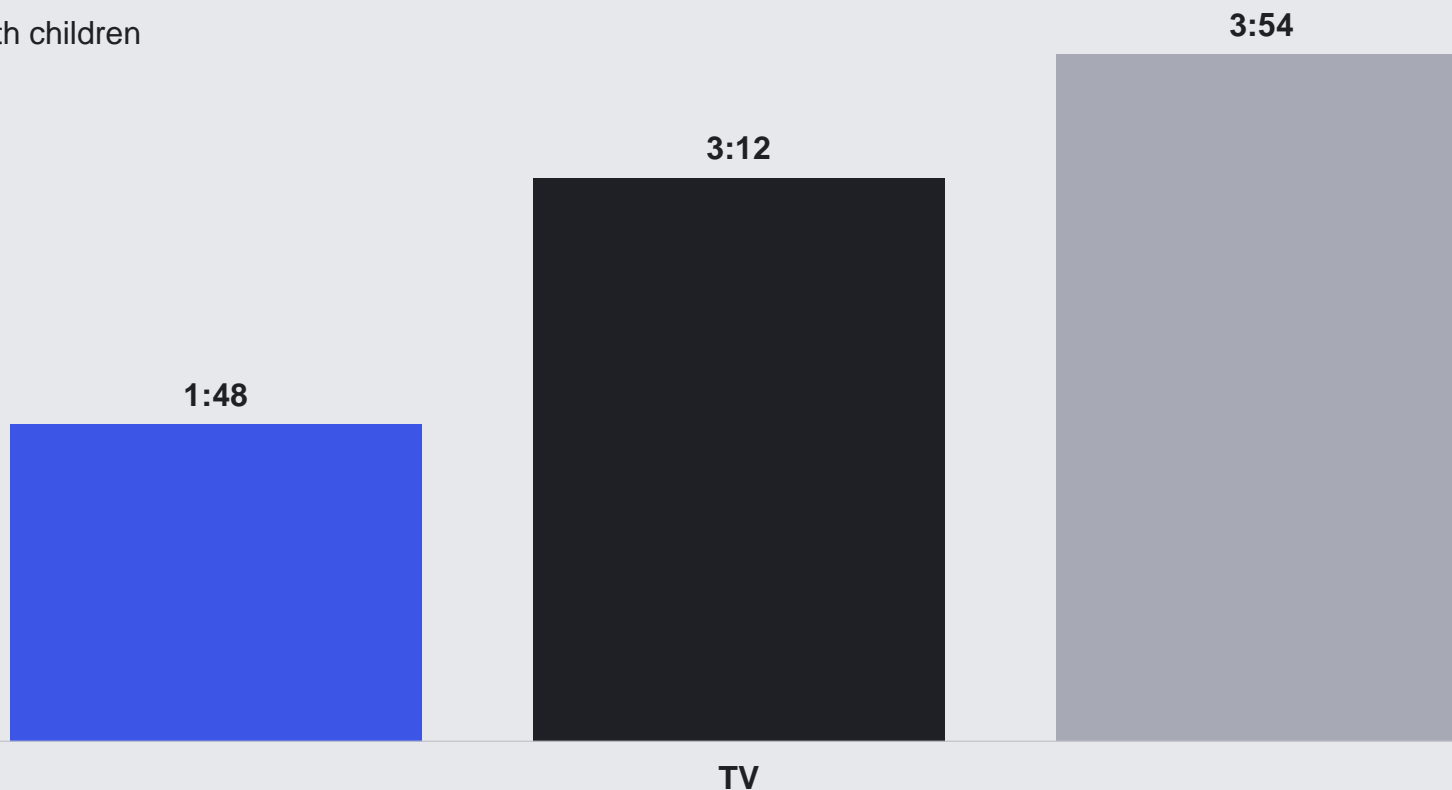
Average hours viewed per day



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

Average hours viewed per day

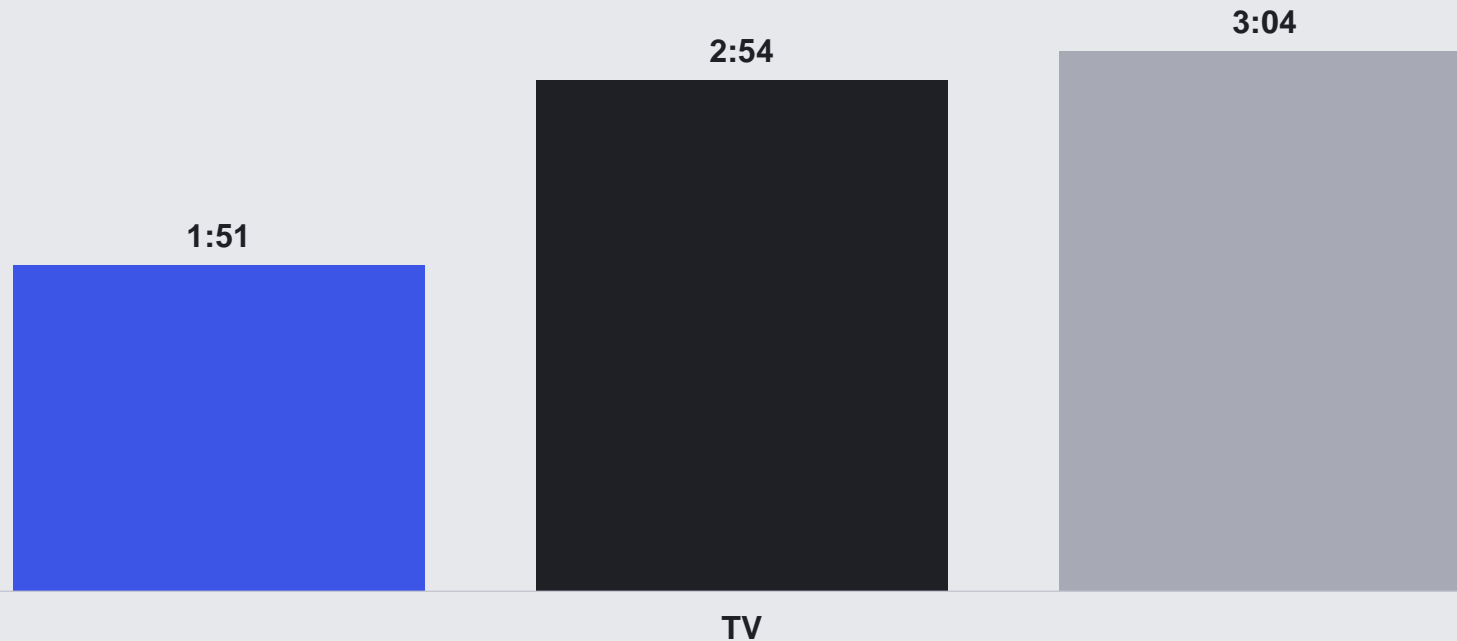
■ 16-24 ■ 25-34 ■ 25-34 with children



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

Average hours viewed per day

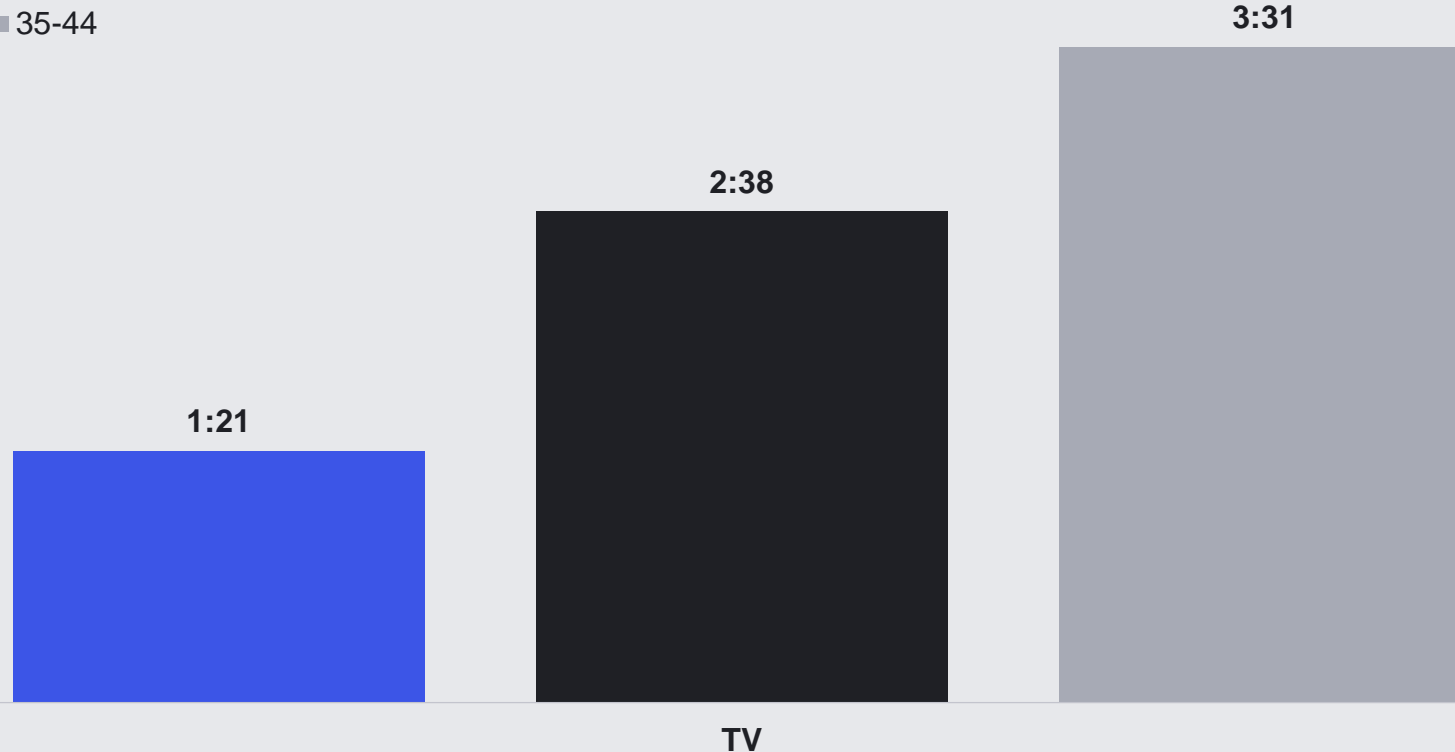
■ 15-24 ■ 25-34 ■ 25-34 with children



Slovenian Millennials' TV viewing increases as they get older

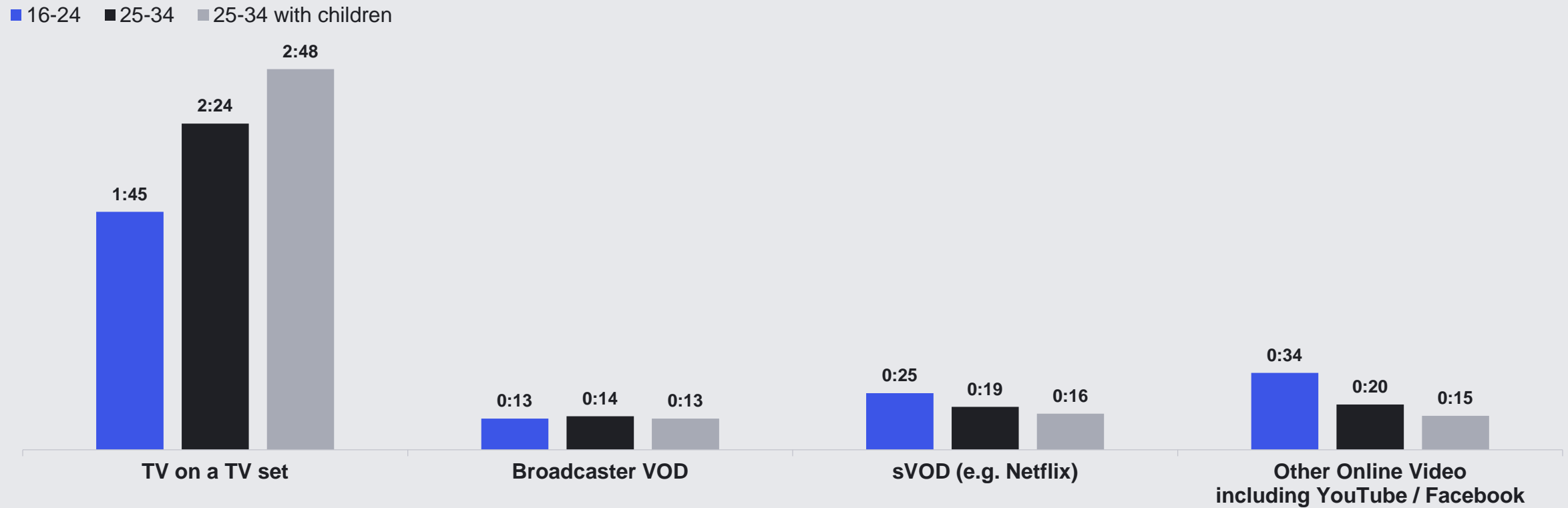
Average hours viewed per day

■ 15-24 ■ 25-34 ■ 35-44



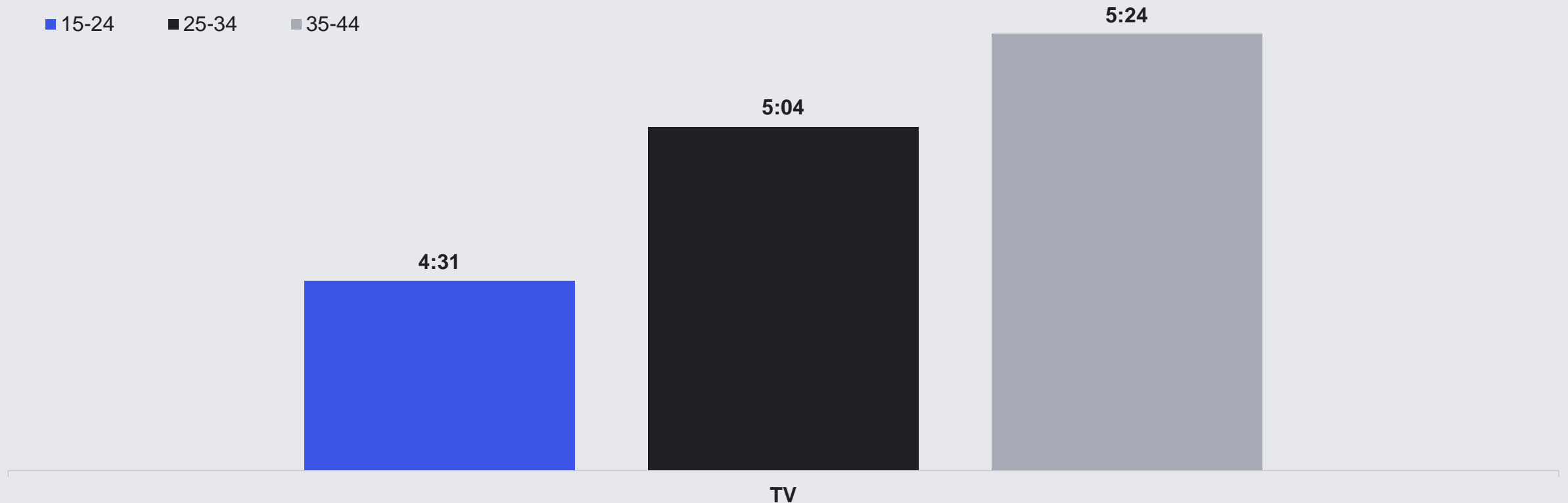
British Millennials' TV viewing increases as they get older and have kids

Average hours viewed per day



Ukrainian Millennials' TV viewing increases as they get older

Average hours viewed per day



Popularity

TV has by far the biggest share of attention

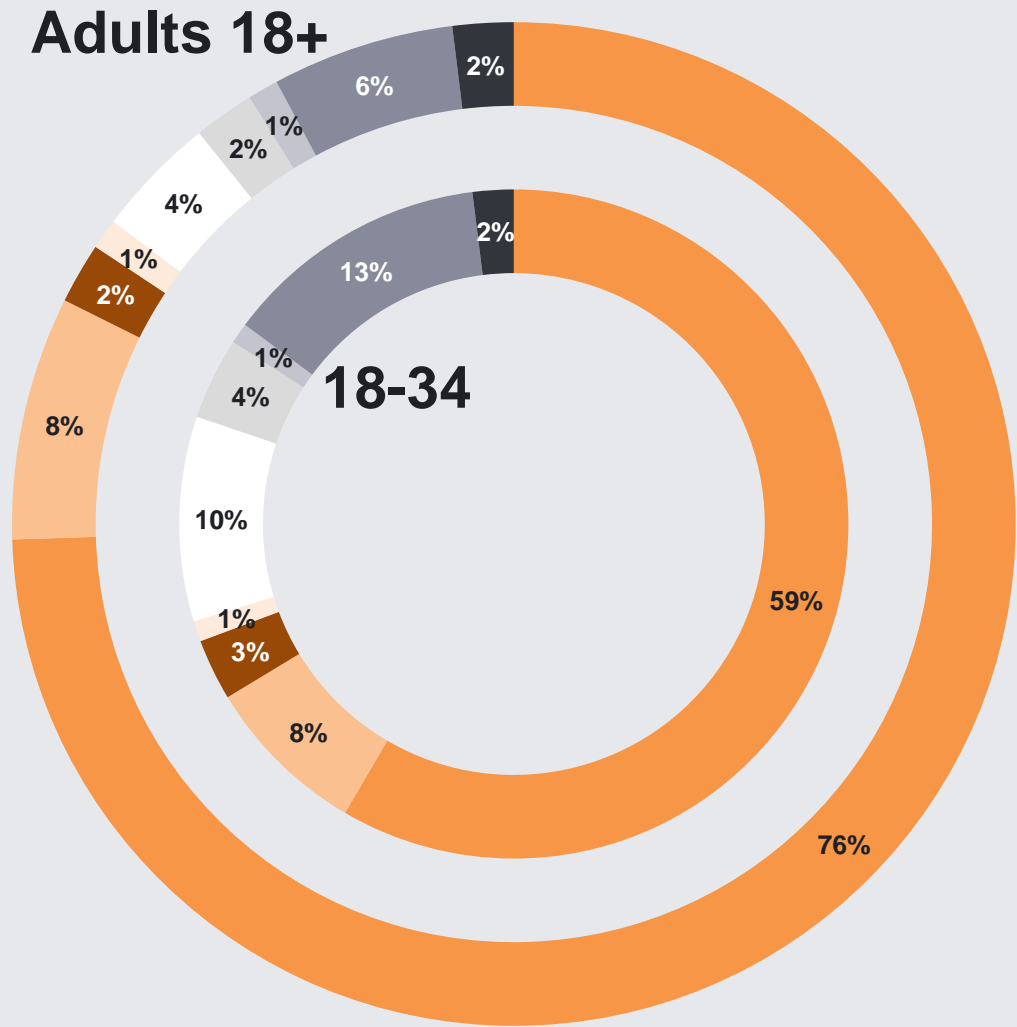
“TV remains very important for us. It’s still a very, very important way for us to drive mass reach, and **the right reach** as well. “

Andrew Clarke, CMO of Mars

February 2017

TV is 87% of video time in Canada

- Live TV
- Playback TV
- Free TV Prog from an Online Service
- VOD from BDU*
- sVOD
- DVD/Blu-Ray
- Movie in Theatre
- YouTube
- Video on Facebook



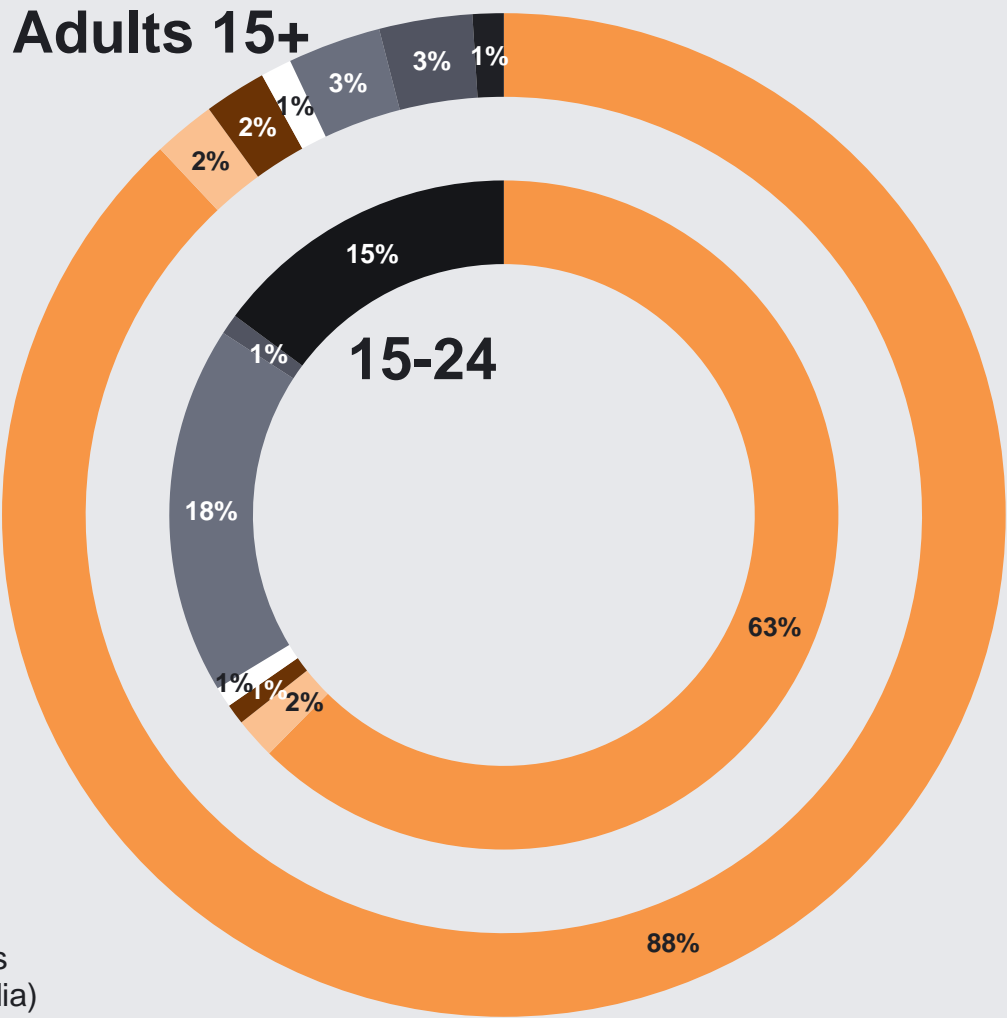
TV is 92% of video time in Czech Republic

Average video time per day

Adults 15+: 235 minutes

15-24: 140 minutes

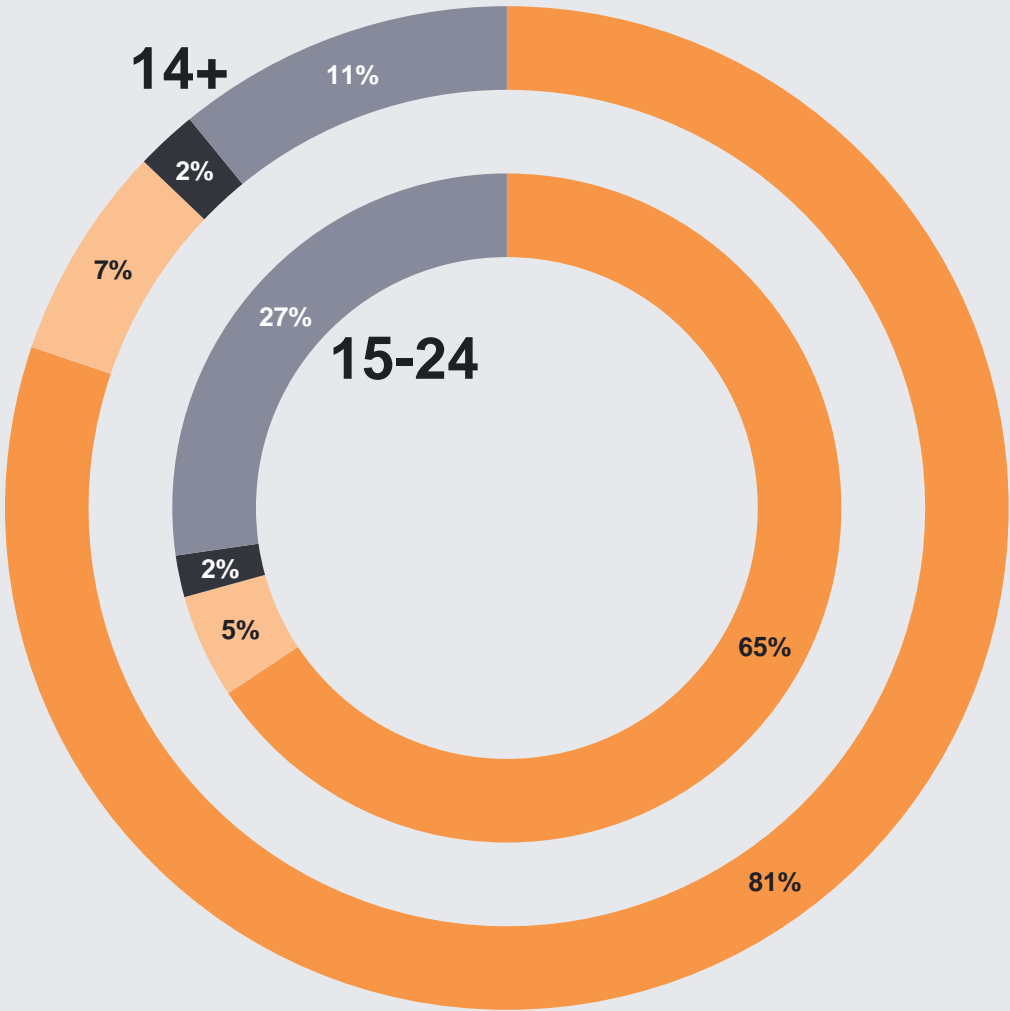
- Live TV
- AVOD (free)
- Recorded TV
- SVOD (paid)
- Other online video
- DVD
- Short form video (online videos under 5 minutes on social media)



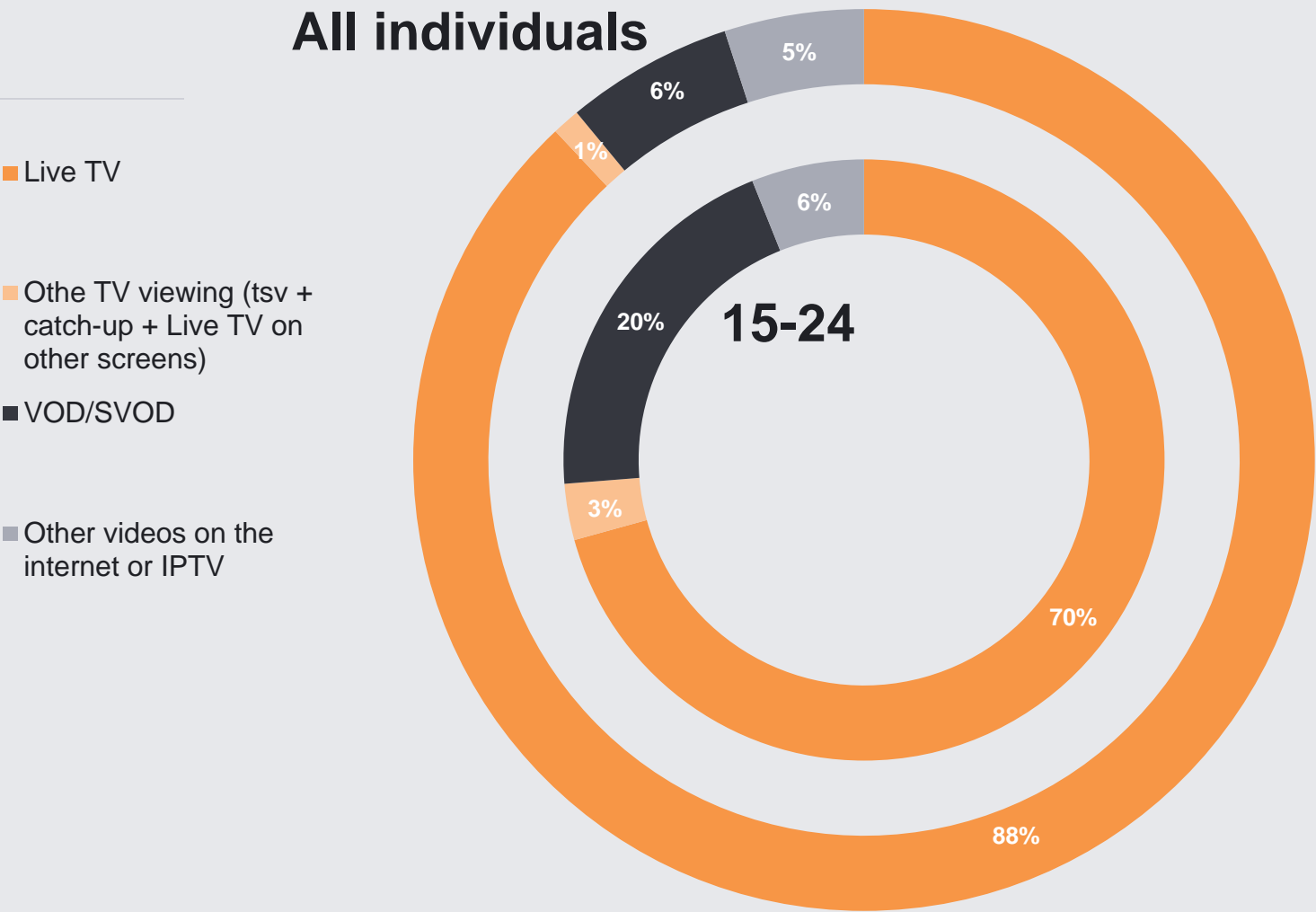
TV is 88% of video time in Finland

Average video time per day
All individuals: 172 minutes

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

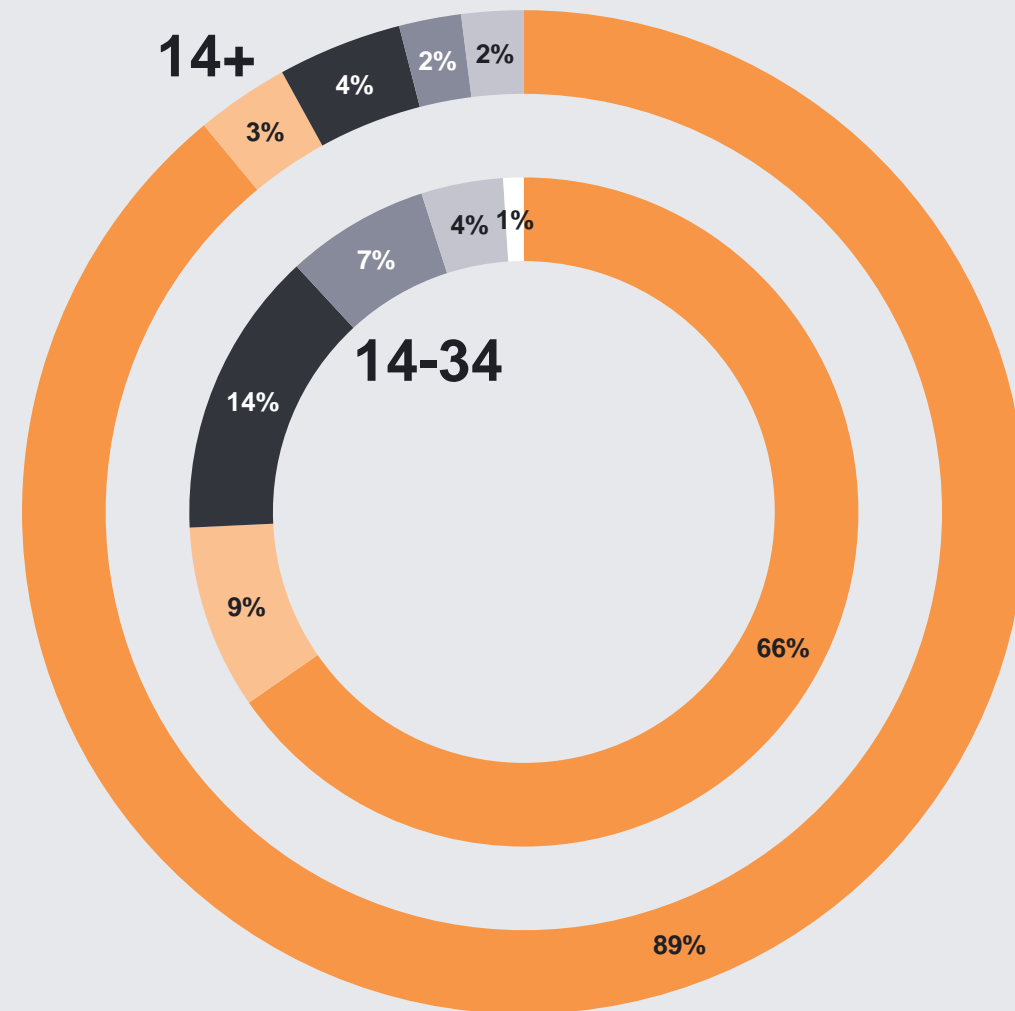


TV is 95% of video time in France



TV is 93% of video time in Germany

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



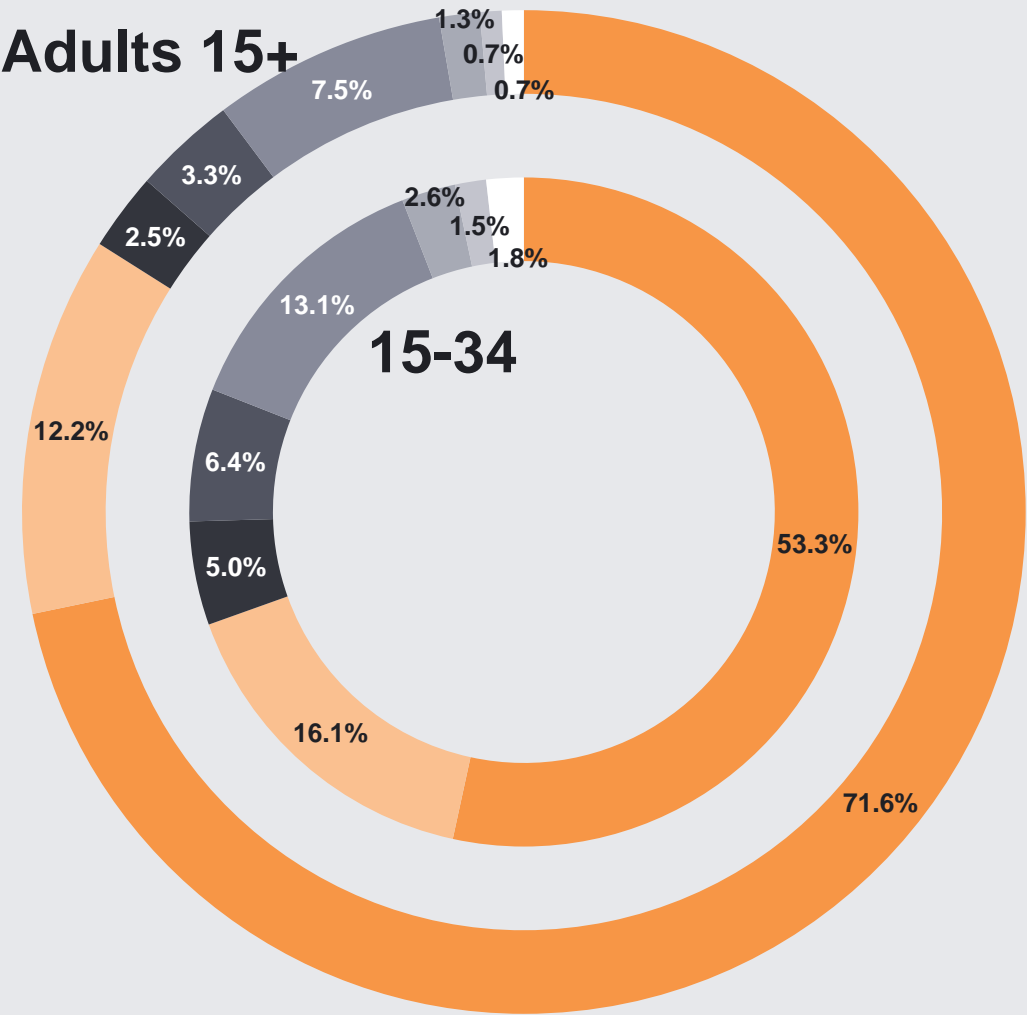
TV is 84% of video time in Ireland

Average video time per day

Adults 15+: 221 minutes

15-34: 212 minutes

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



TV is 94% of video time in Italy

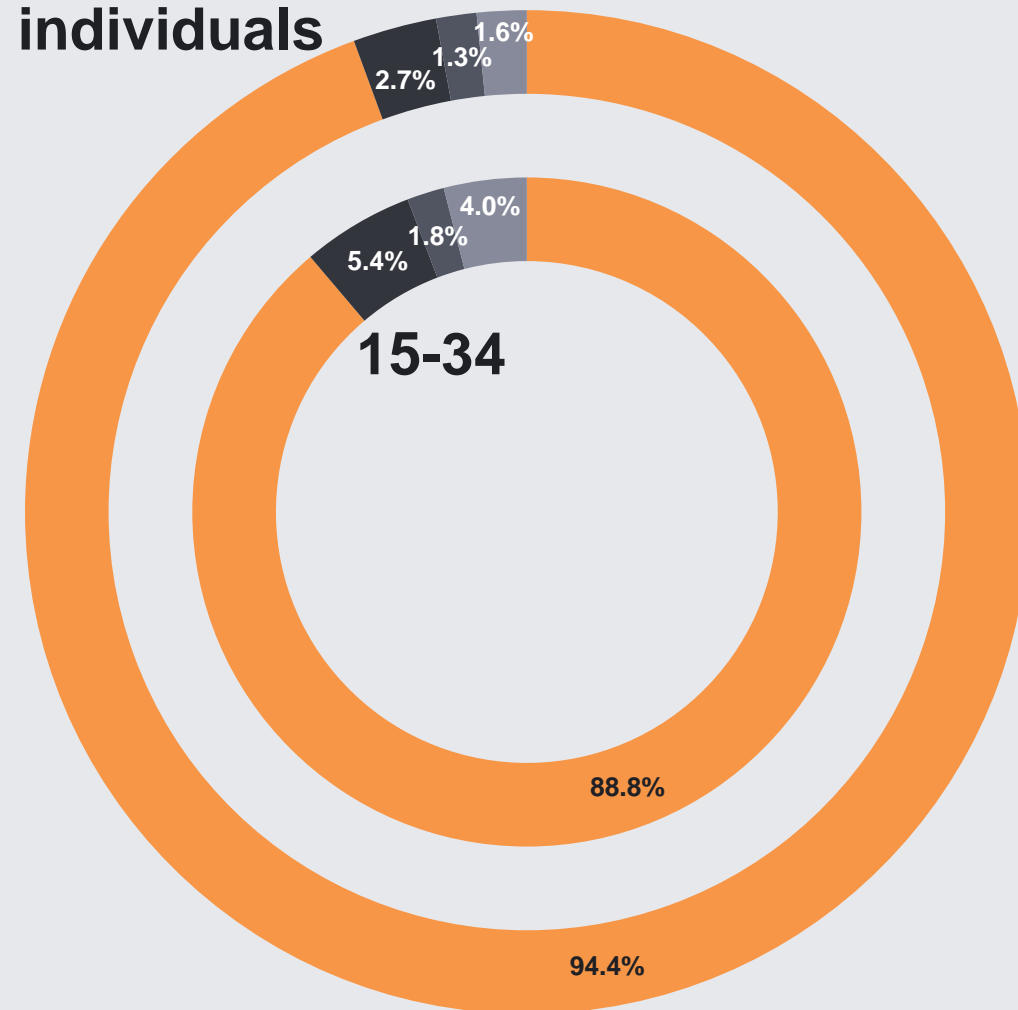
Average video time per day

All individuals: 292 minutes

15-34: 180 minutes

- TV
- YouTube
- Facebook
- Other

All individuals



TV is 94% of video time in the Netherlands

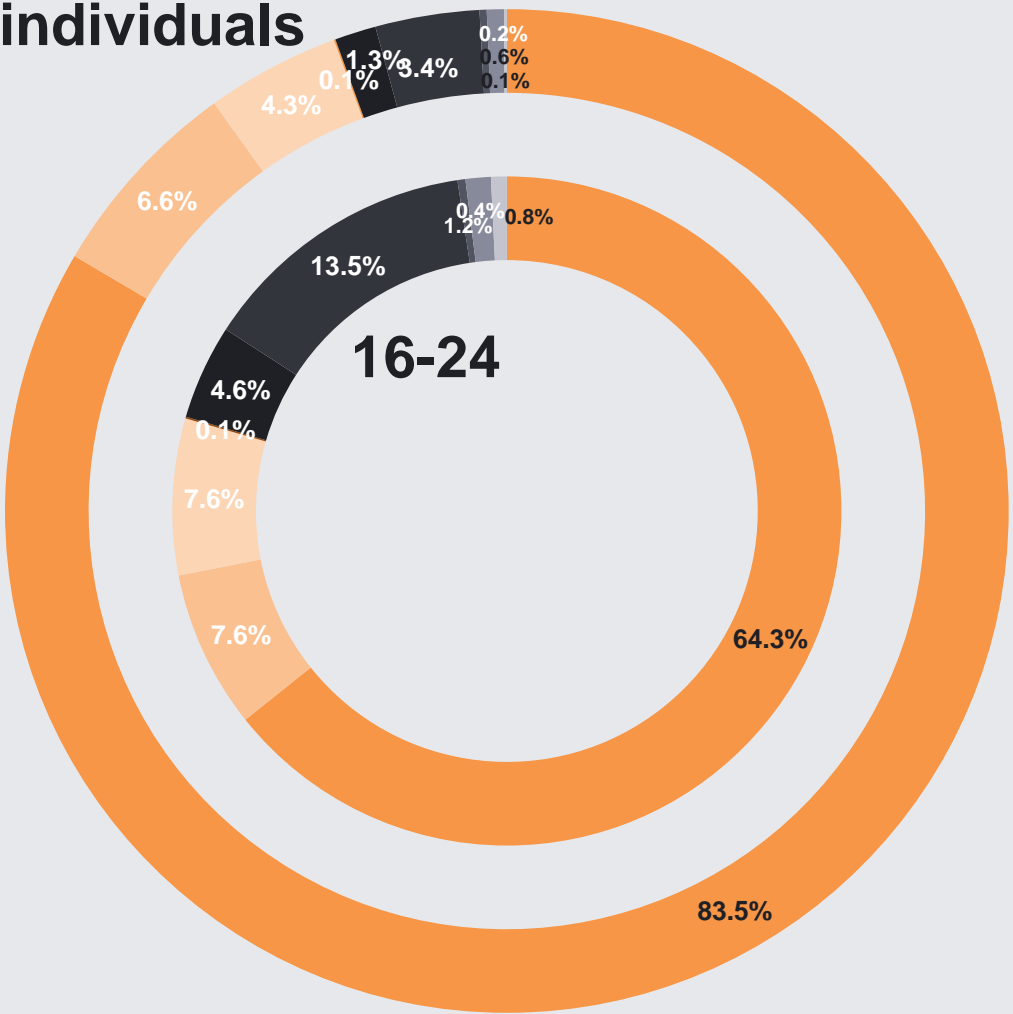
Average video time per day

All individuals: 217 minutes

16-24: 131 minutes

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

All individuals

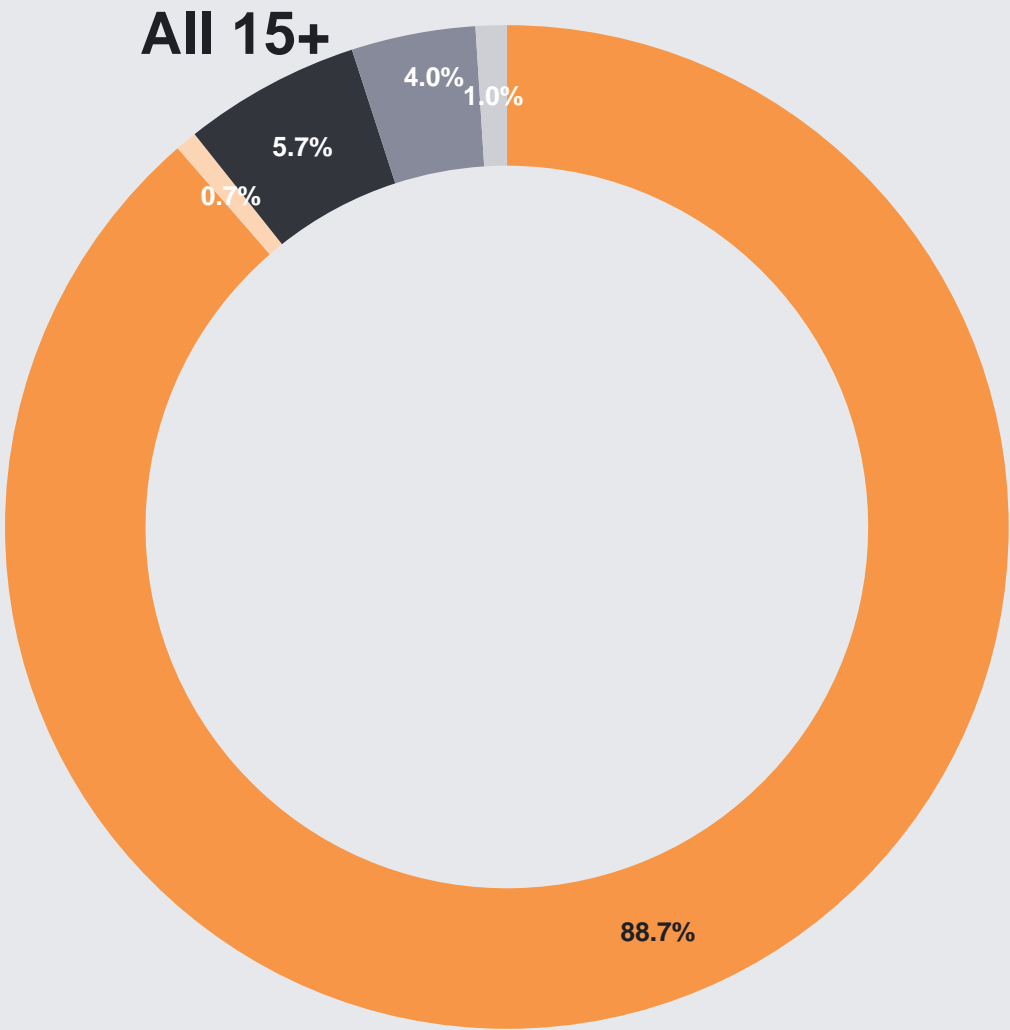


TV is 89% of video time in Poland

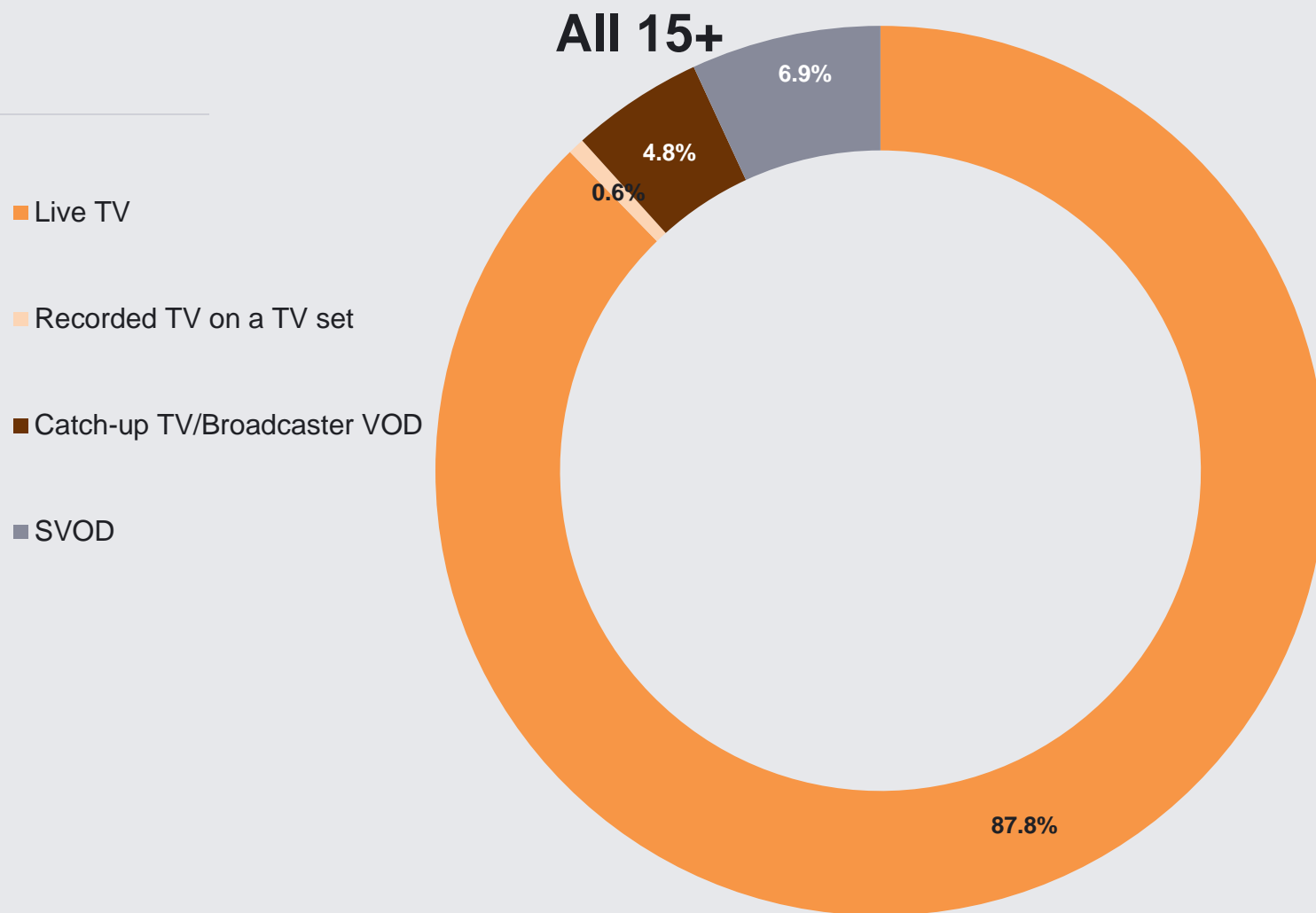
Average video time per day

All 15+: 317minutes

- Live TV
- TSV
- VOD/OTT
- Facebook
- YouTube



TV is 93% of video time in Russia



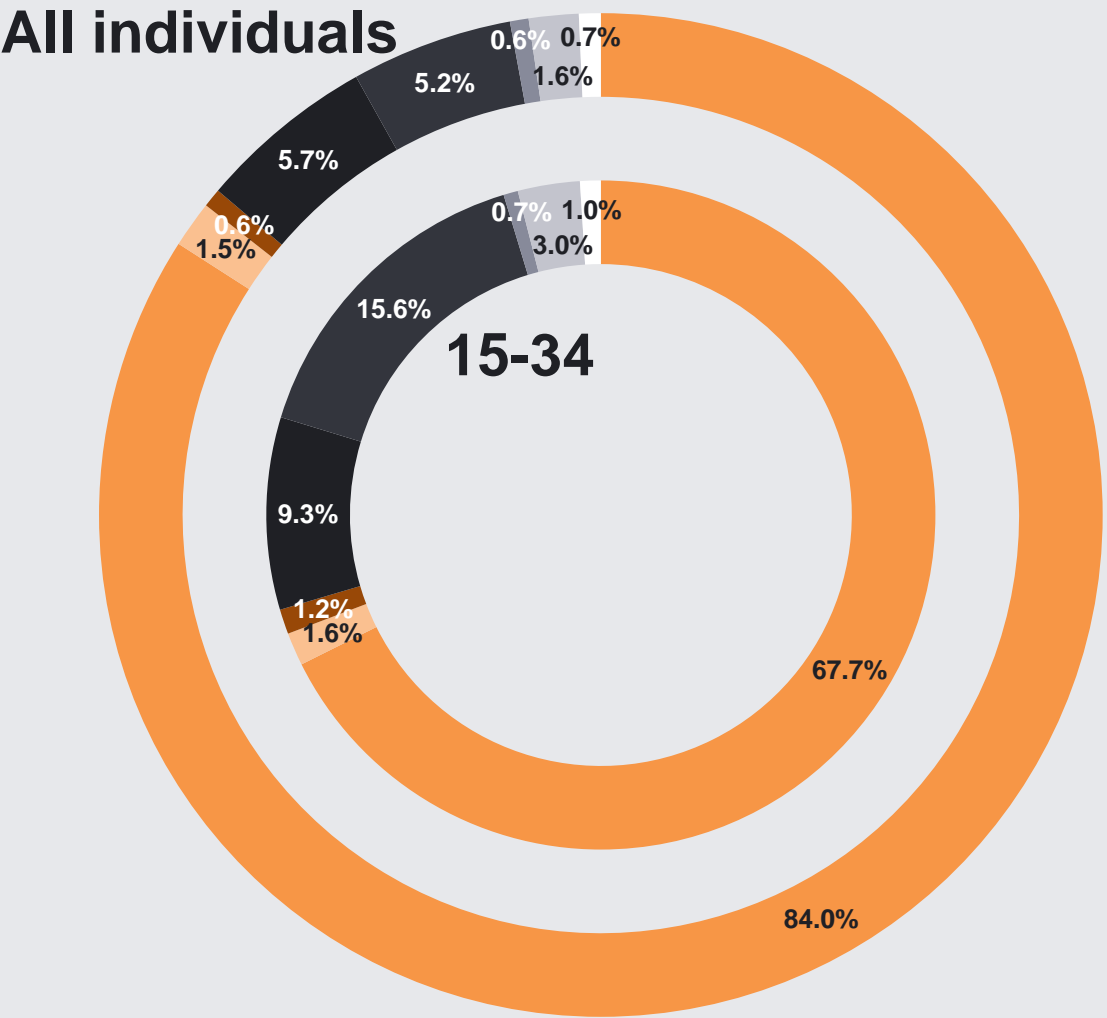
TV is 86% of video time in Spain

Average video time per day

All individuals: 265 minutes

15-34: 186 minutes

- Live TV
- Time Shift 7 days
- Broadcaster VOD
- Other Online Video
- Youtube
- Facebook
- Adult XXX Video
- Suscription VOD



TV is 73% of video time in Sweden

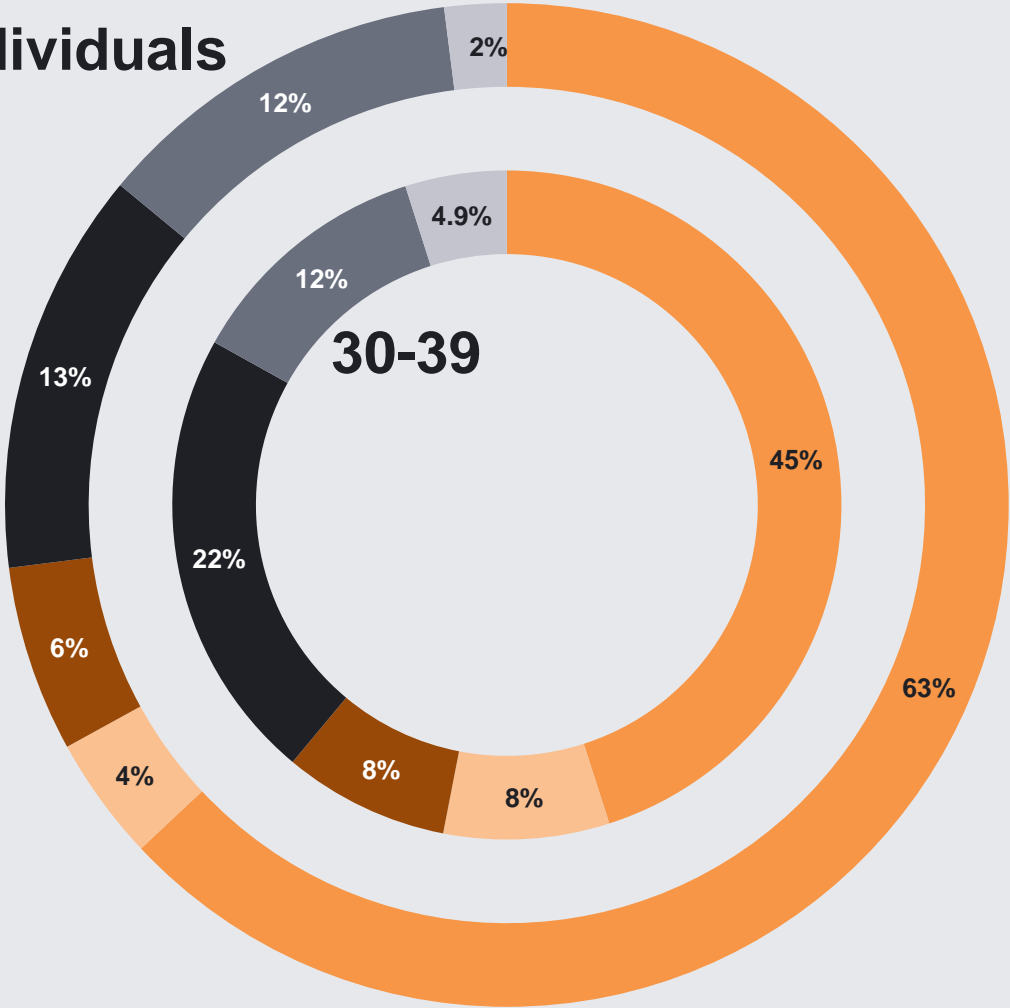
Average video time per day

All individuals: 199 minutes

30-39: 162 minutes

- Live TV
- Timeshift
- Broadcaster AVOD
- Subscription VOD
- YouTube
- Other online video

All individuals



TV is 97% of video time in Switzerland

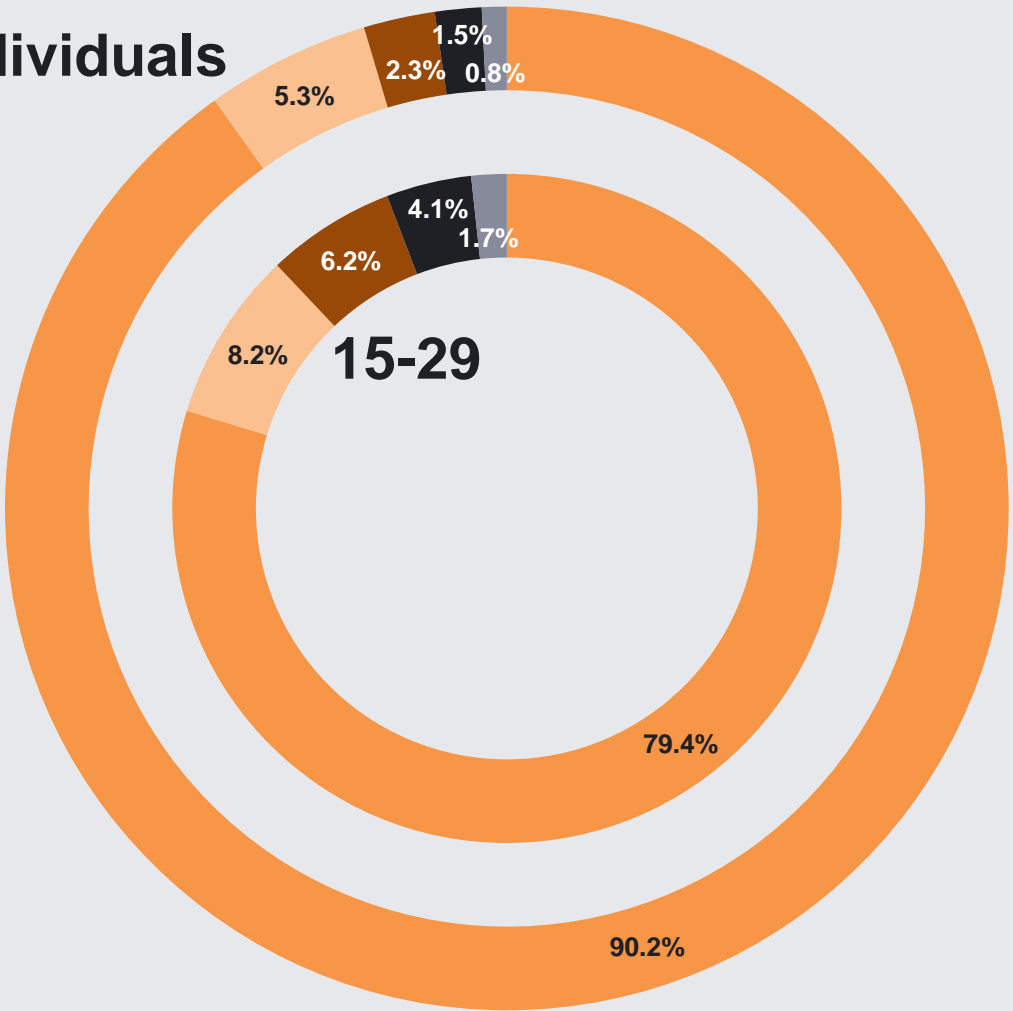
Average video time per day

All individuals: 132 minutes

15-29: 97 minutes

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

All individuals



TV is 75% of video time in the UK

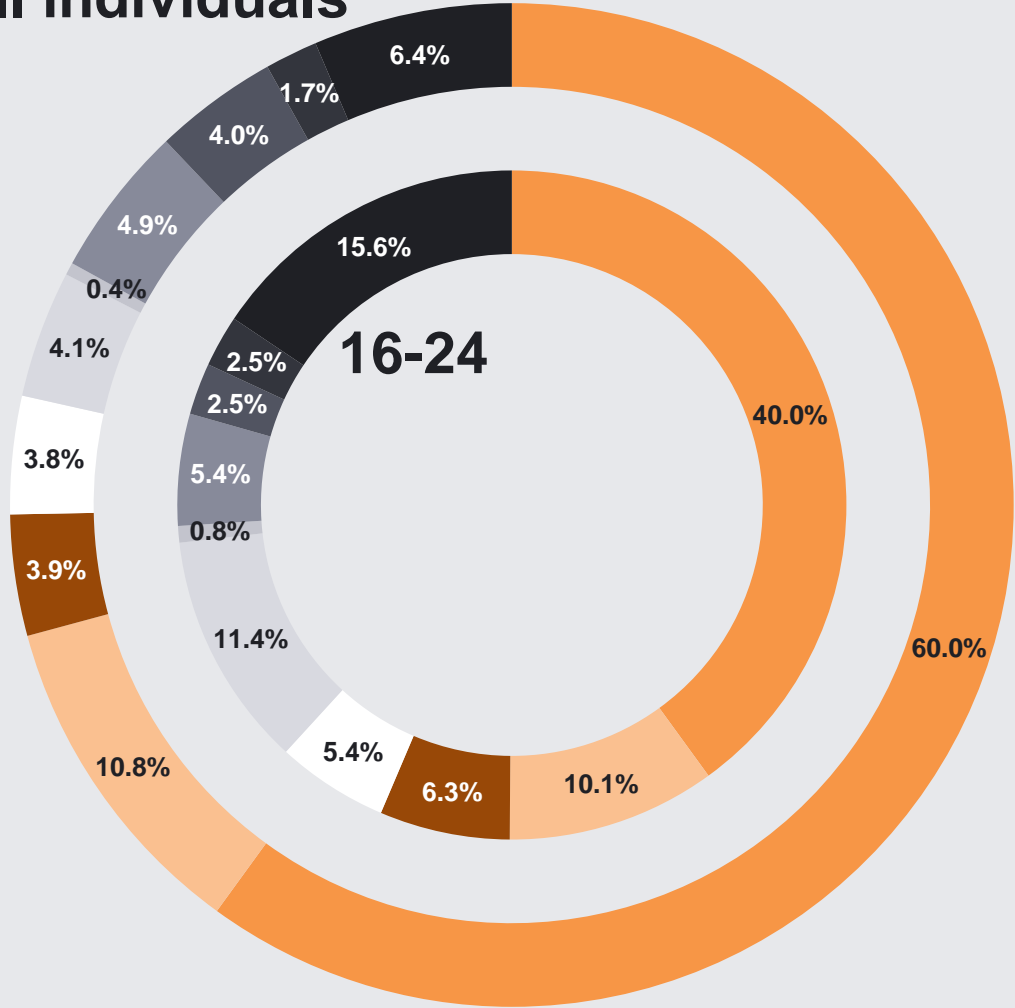
Average video time per day

All individuals: 277 minutes

16-24: 207 minutes

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

All individuals

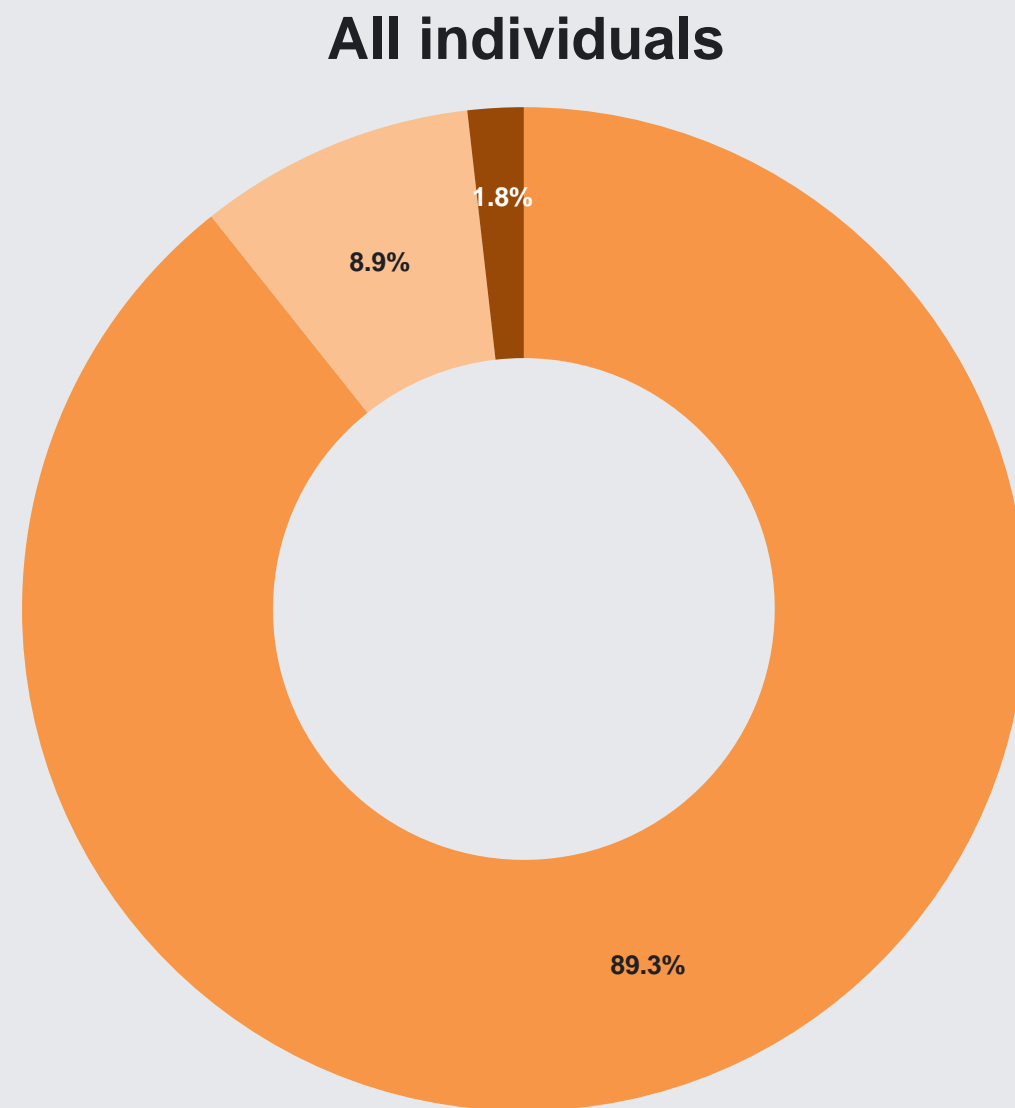


**On top of being the
world's favourite
form of video, the
majority of TV
viewing is live**

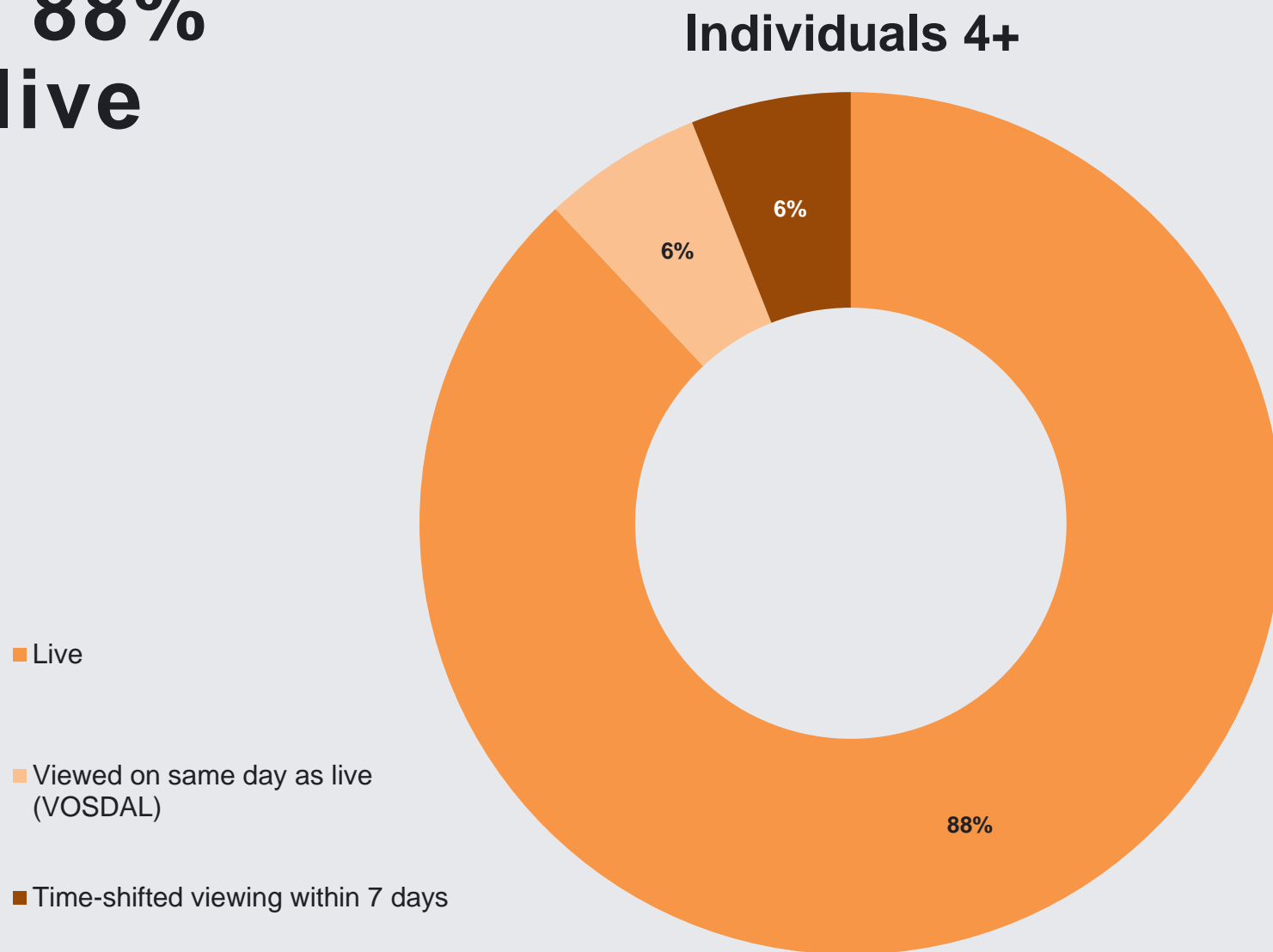


In Australia, 89% of TV is watched live

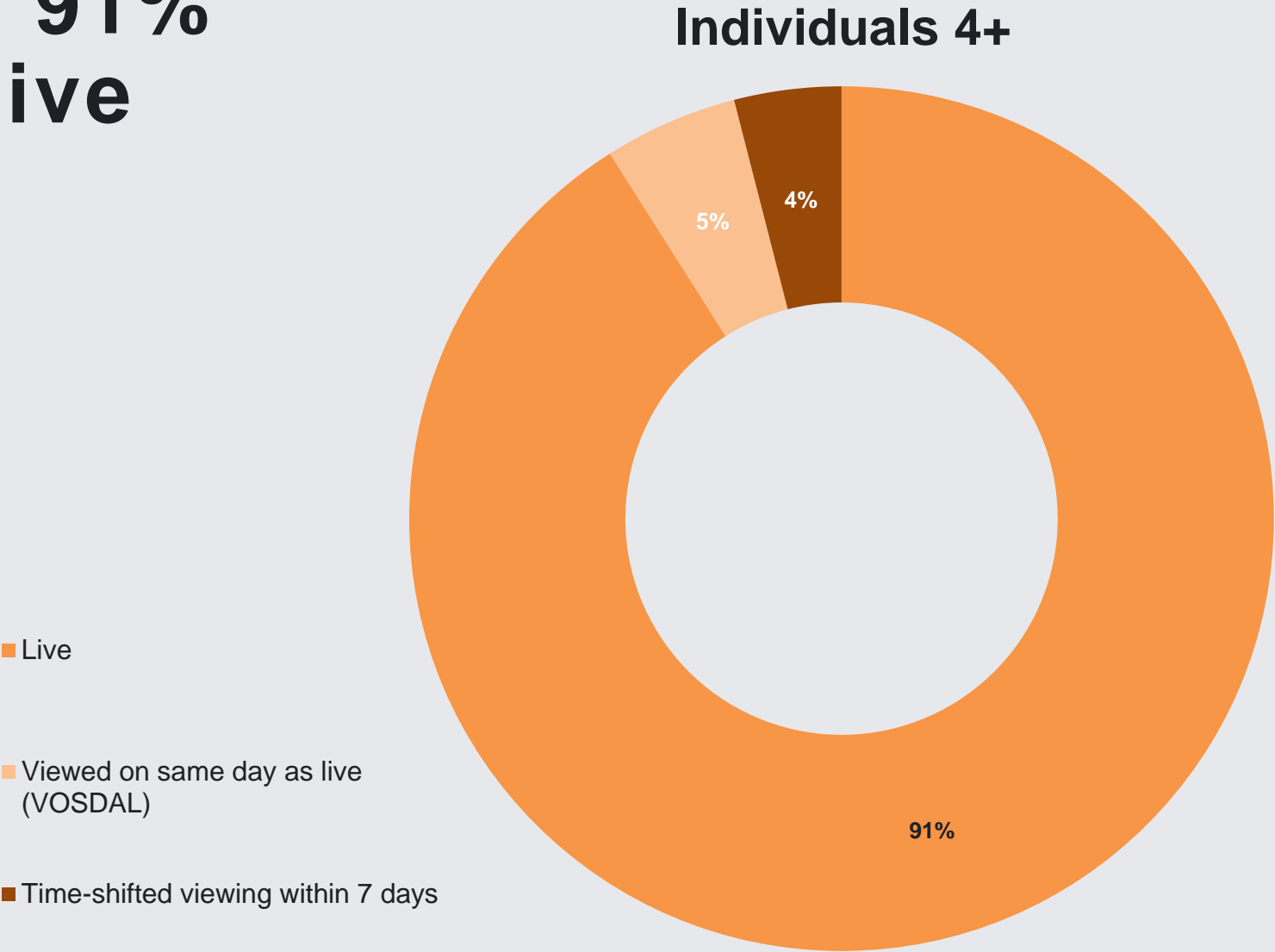
- Live
- Playback within 7 days
- Playback within 8-28 days



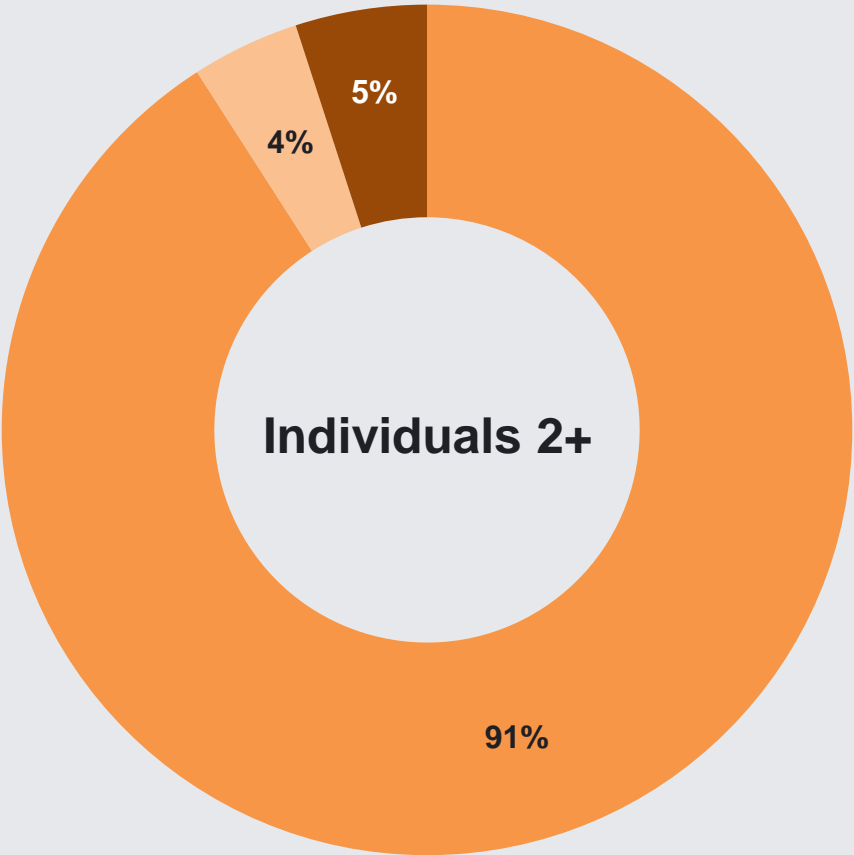
In Belgium North, 88% of TV is watched live



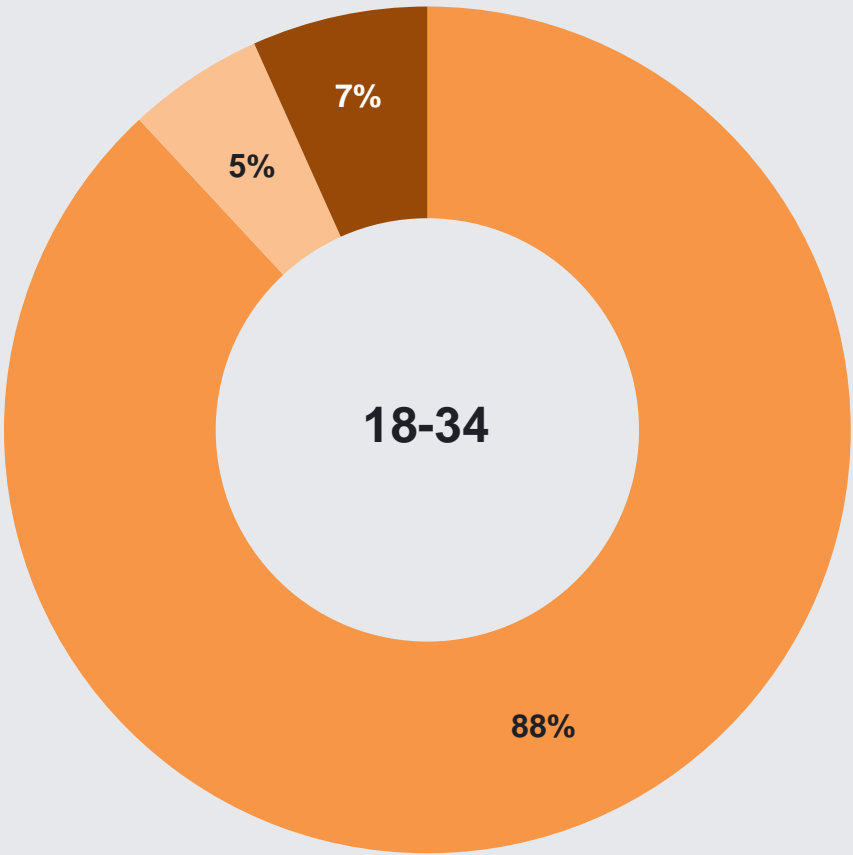
In Belgium South, 91% of TV is watched live



In Canada, 91% of TV is watched live

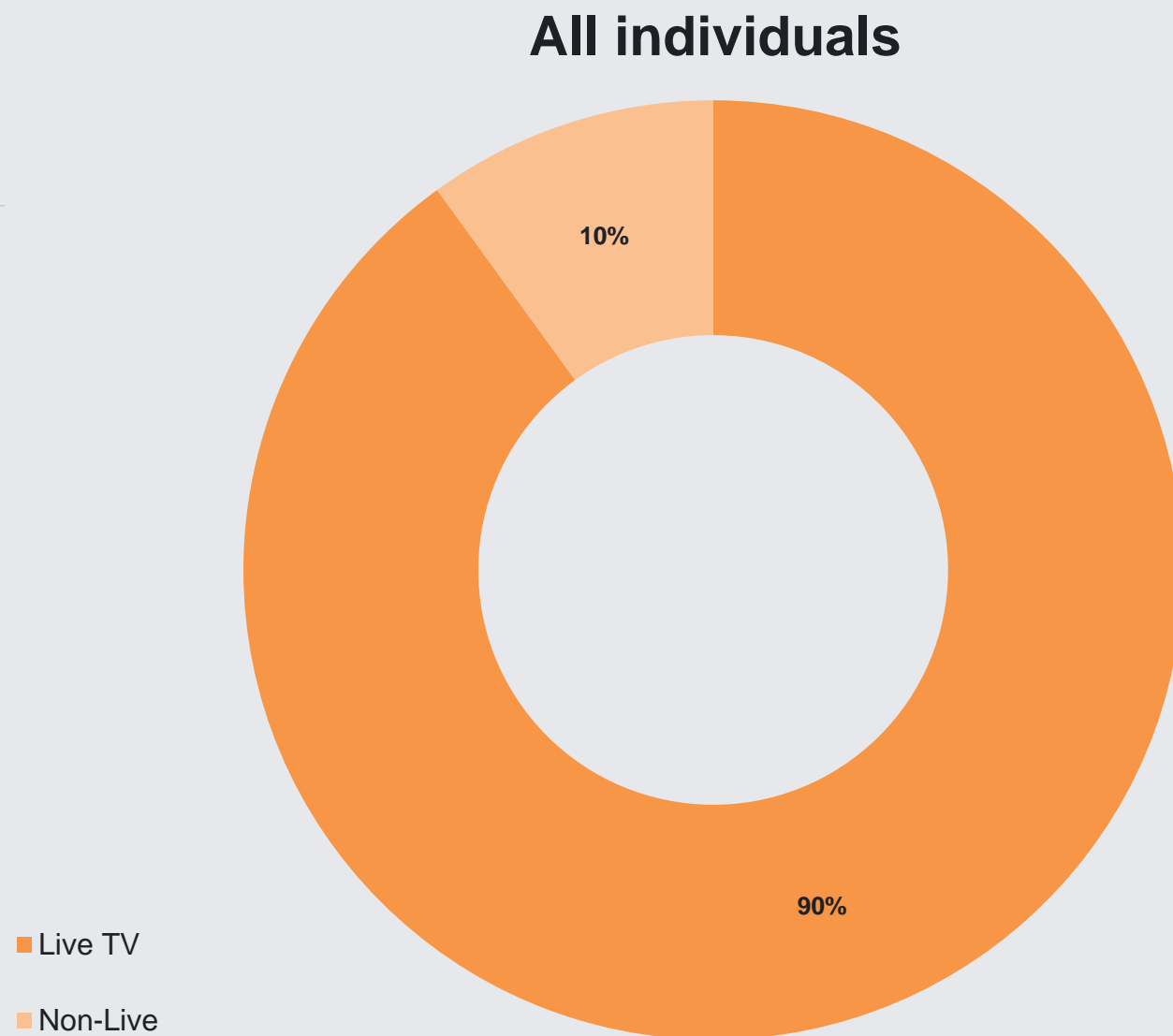


■ Live ■ Same Day Play Back ■ Playback 1-7 days

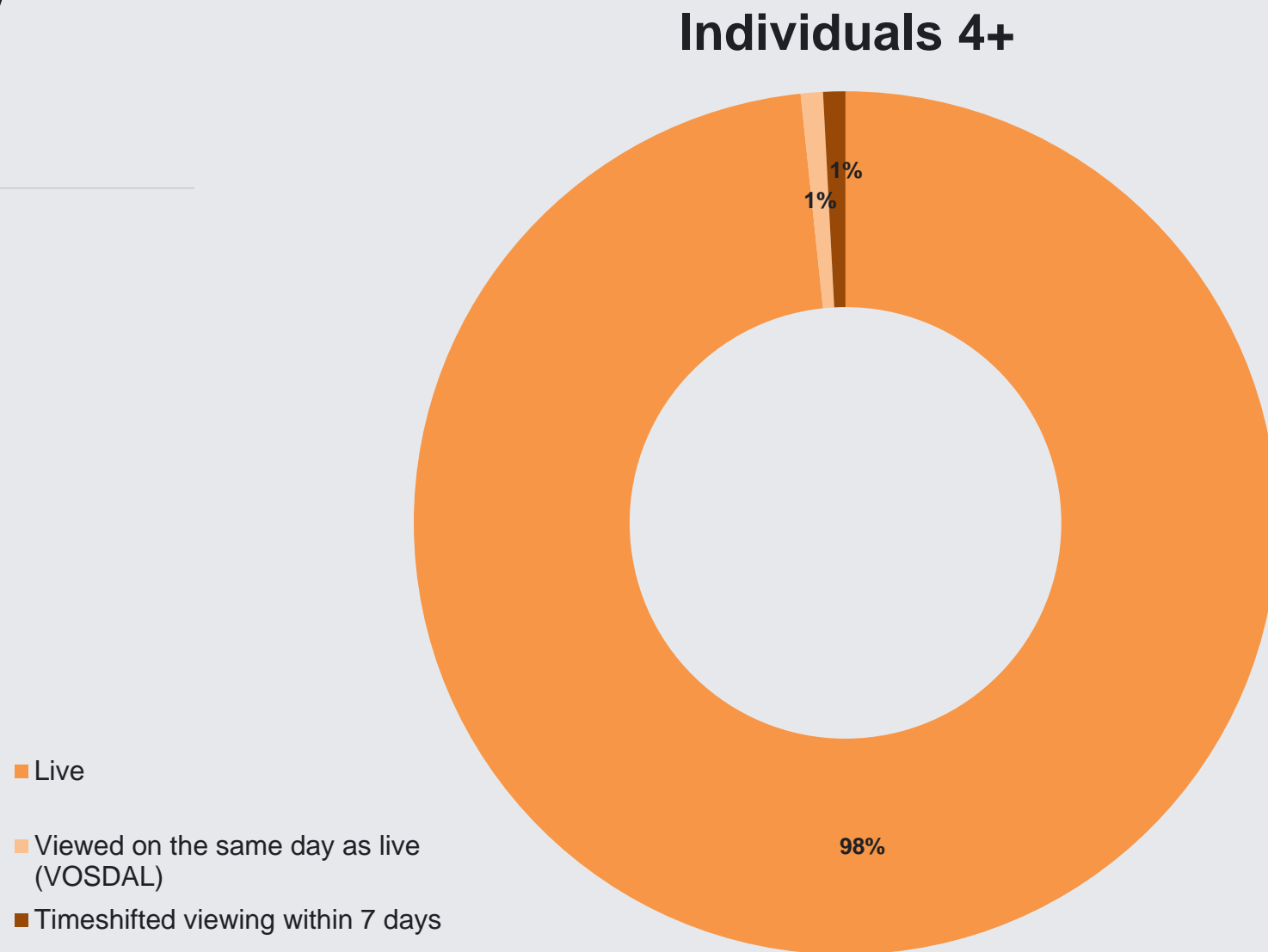


■ Live ■ Same Day Play Back ■ Playback 1-7 days

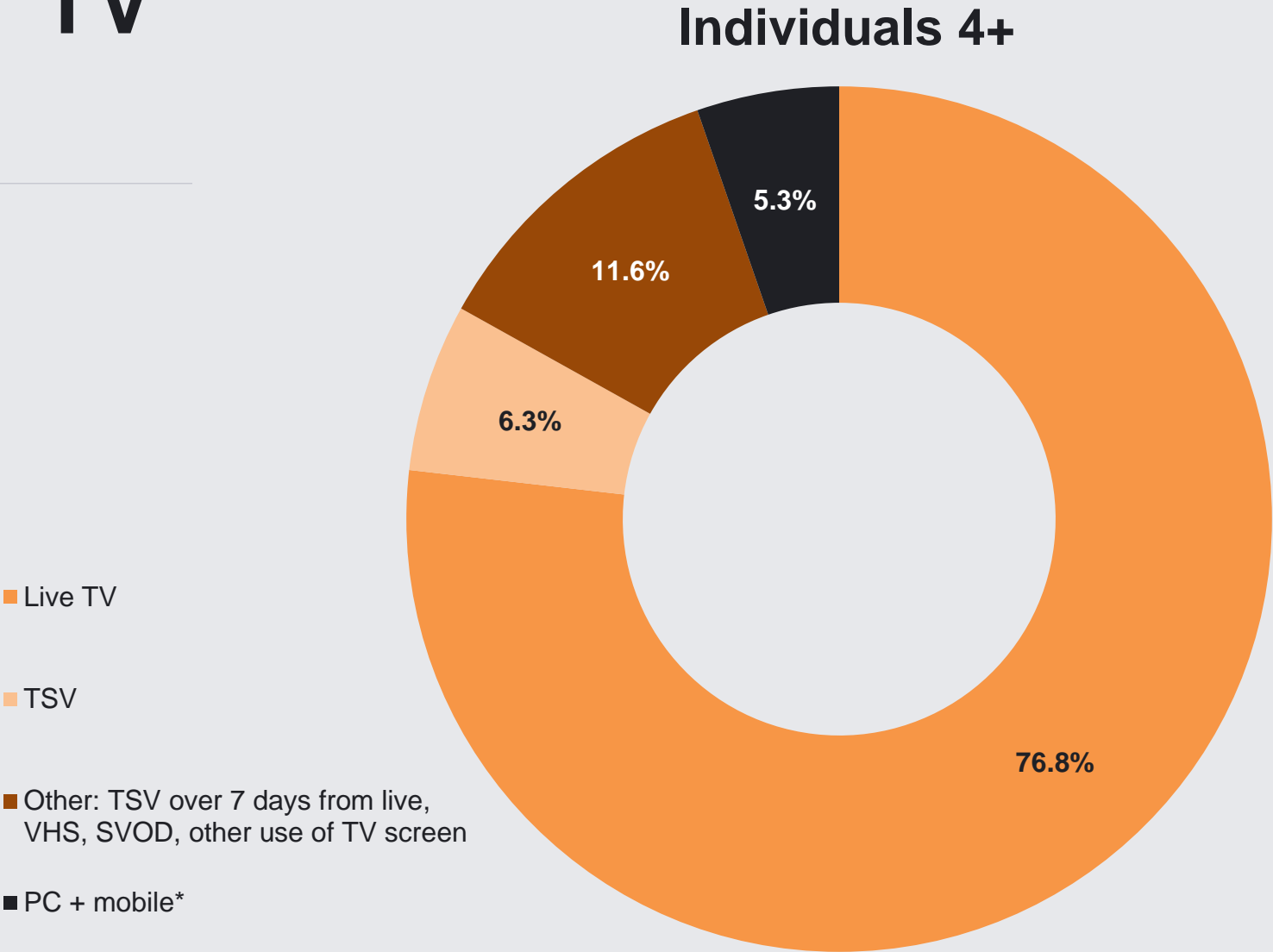
In Ireland, 90% of TV is watched live



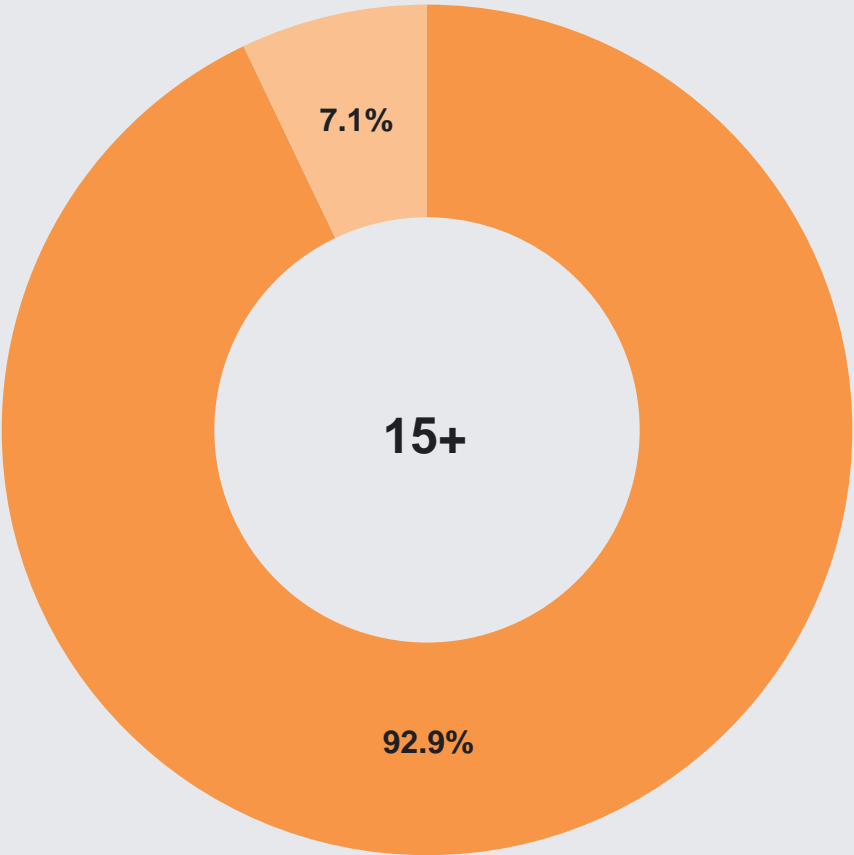
In Italy, 99% of TV is watched live



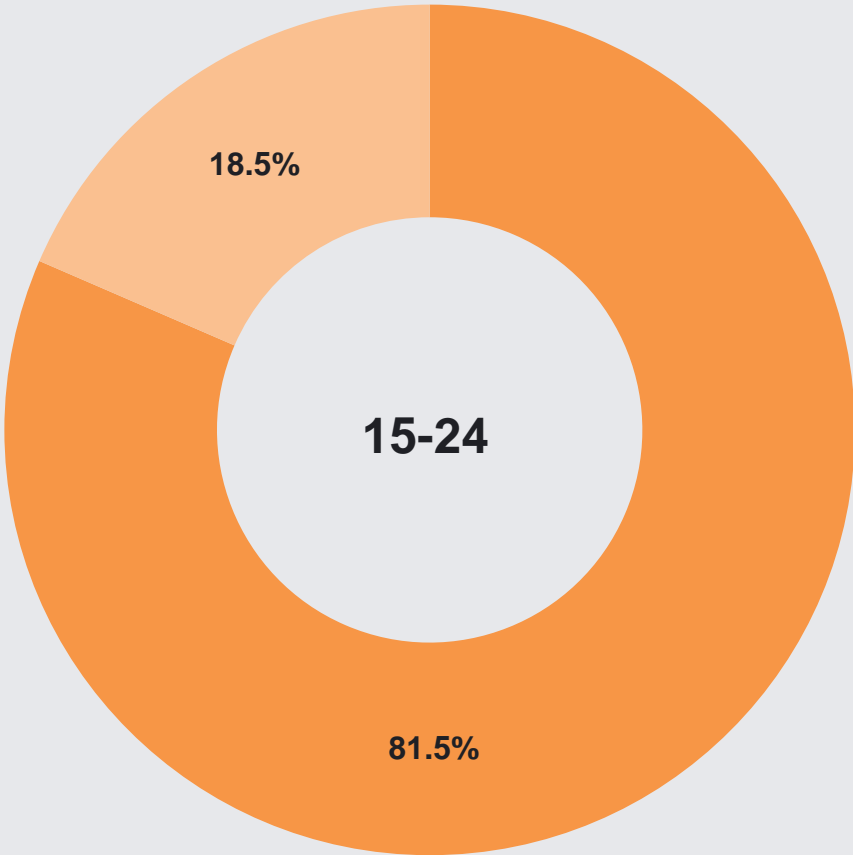
In Finland, 76% of TV is watched live



In France, 93% of TV is watched live

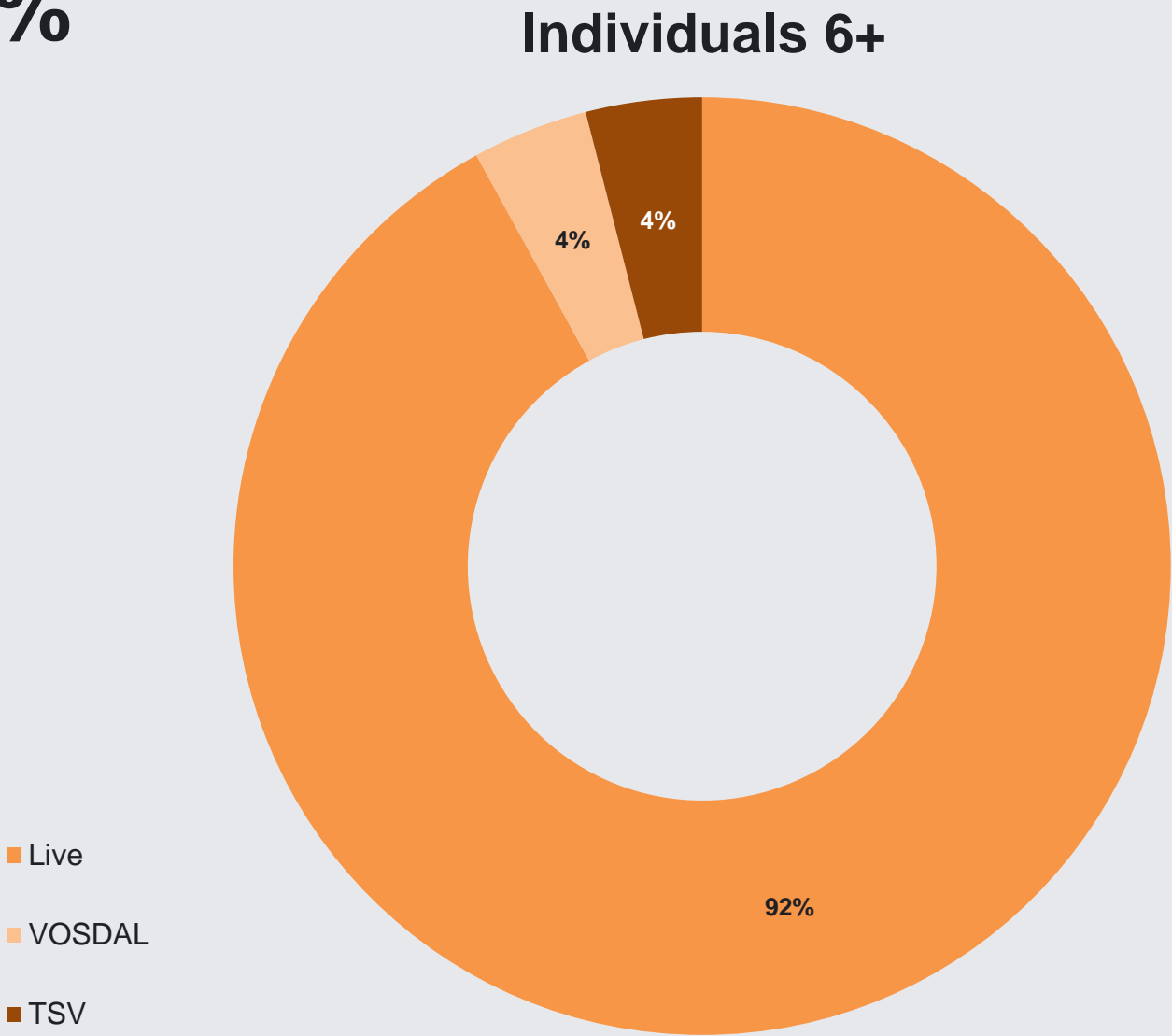


■ Live TV ■ Non-live

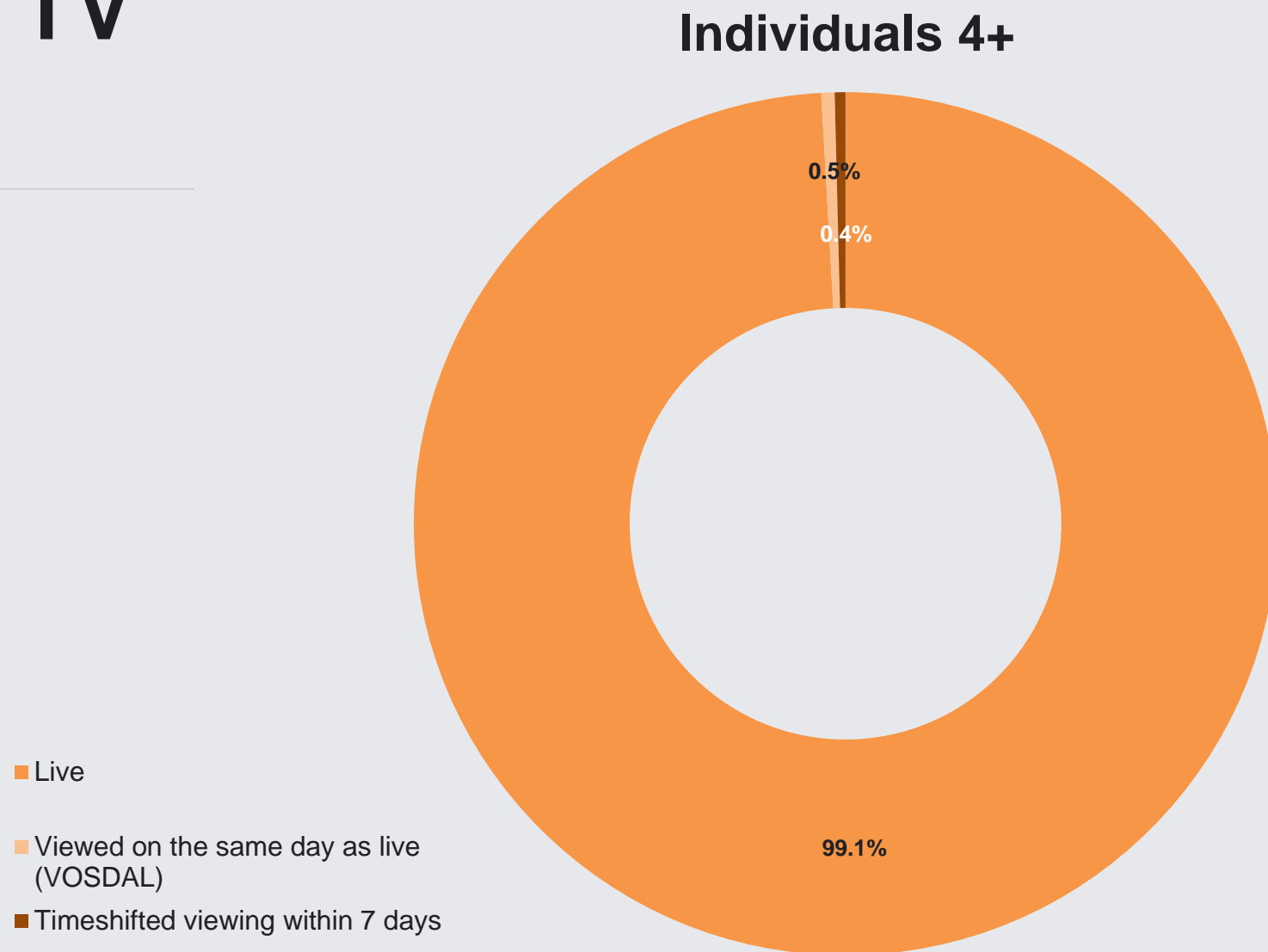


■ Live TV ■ Non-live

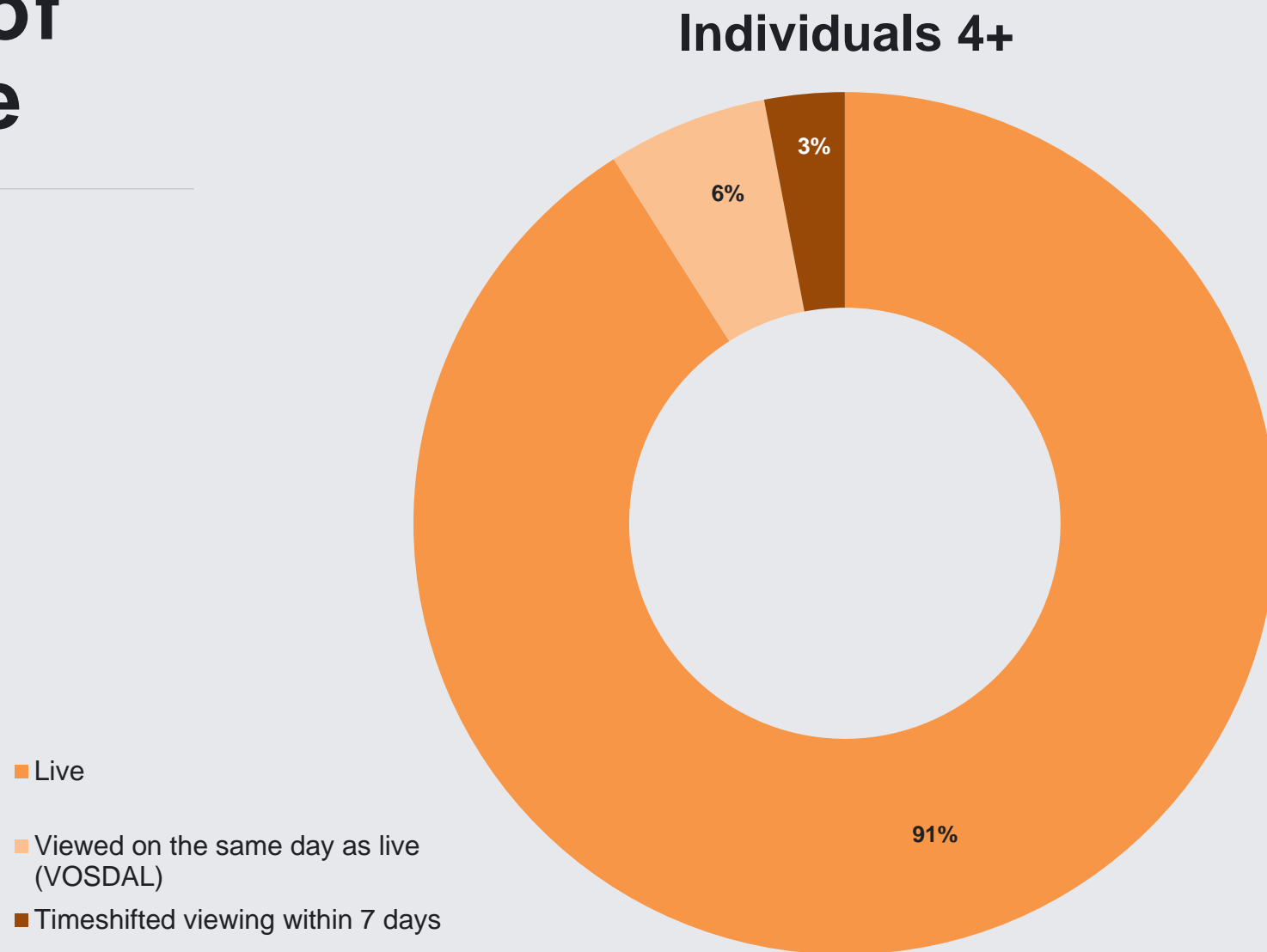
In the Netherlands, 92% of TV is watched live



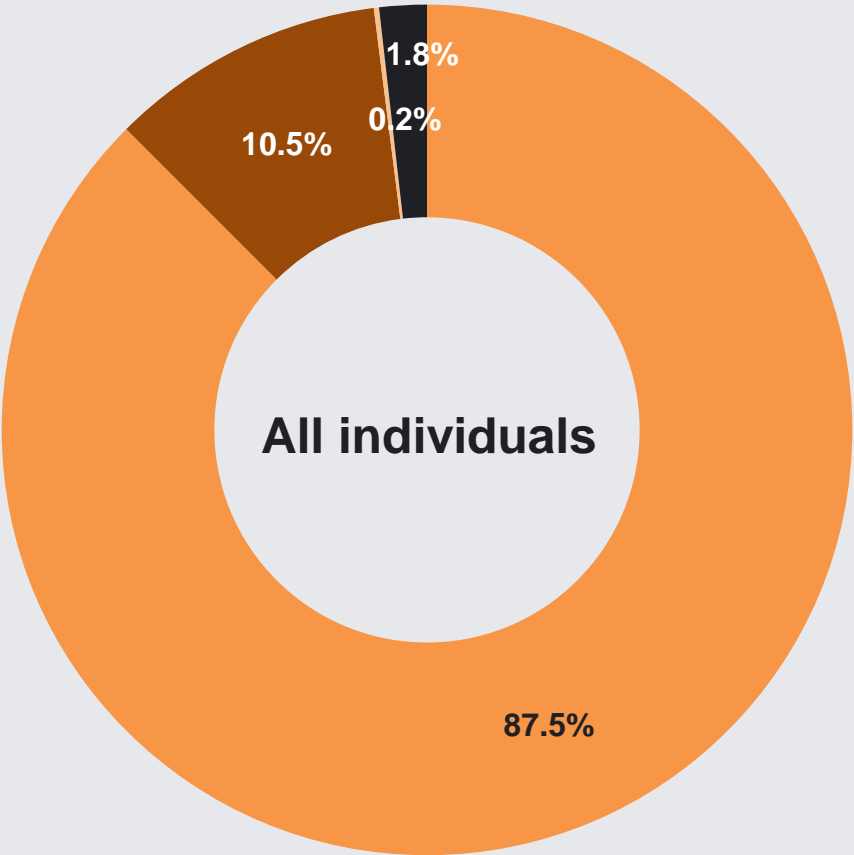
In Poland, 99% of TV is watched live



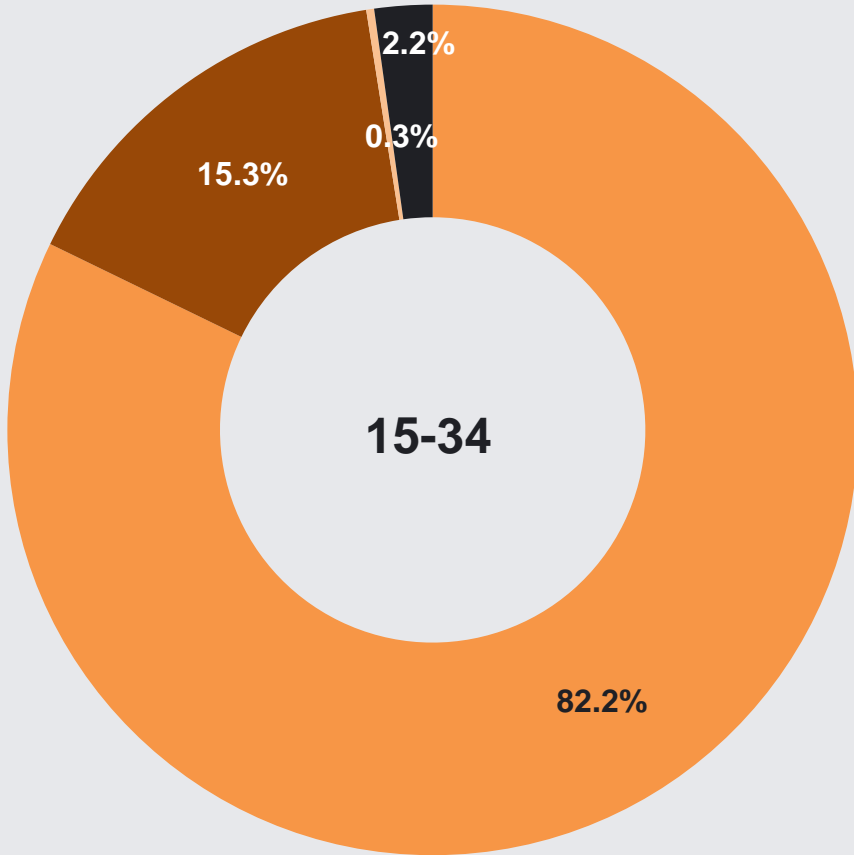
In Slovenia, 91% of TV is watched live



In Spain, 87.5% of TV is watched live

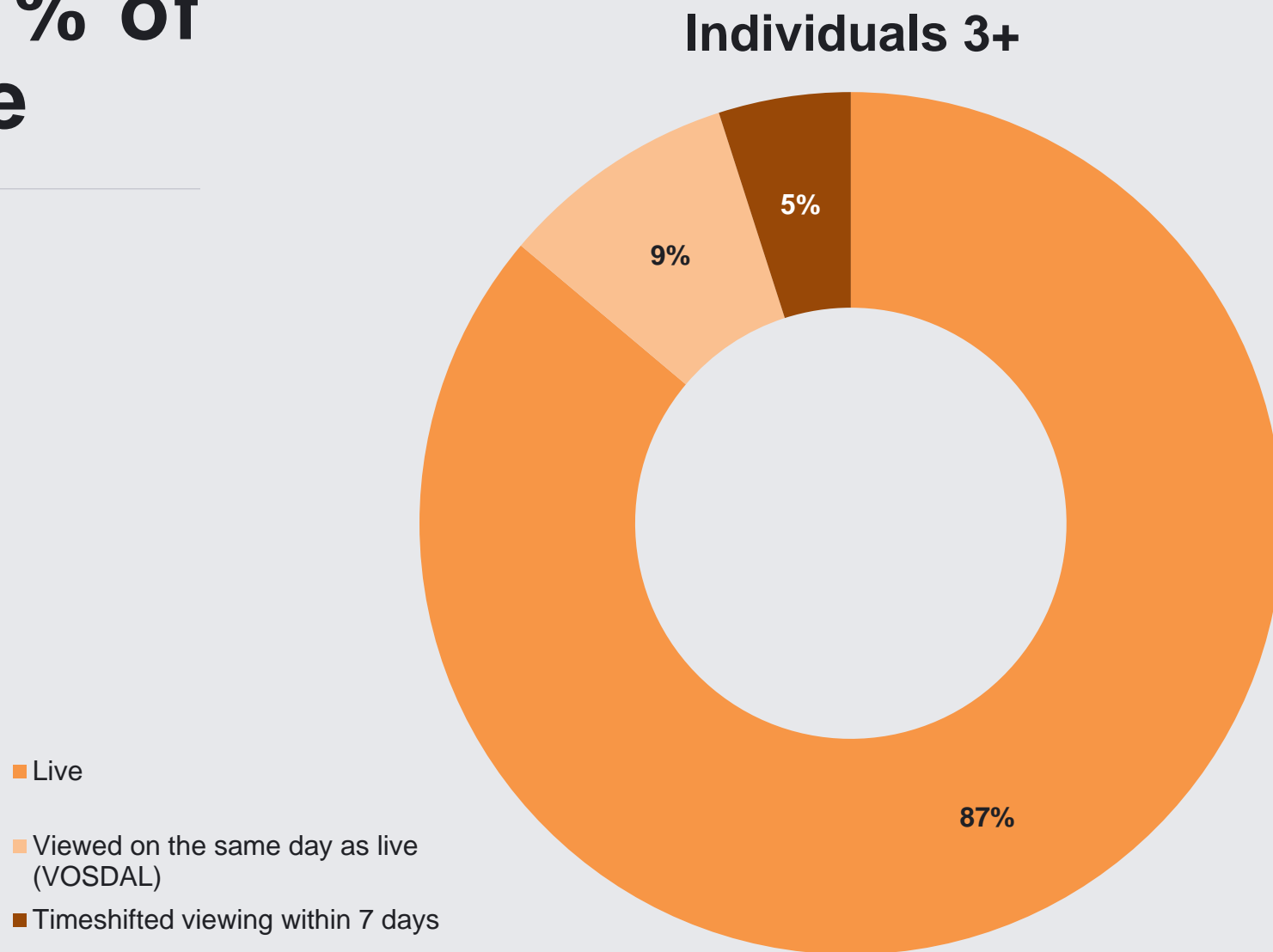


■ Live TV ■ Time Shift 7 days ■ Broadcaster VOD ■ Other Online Video

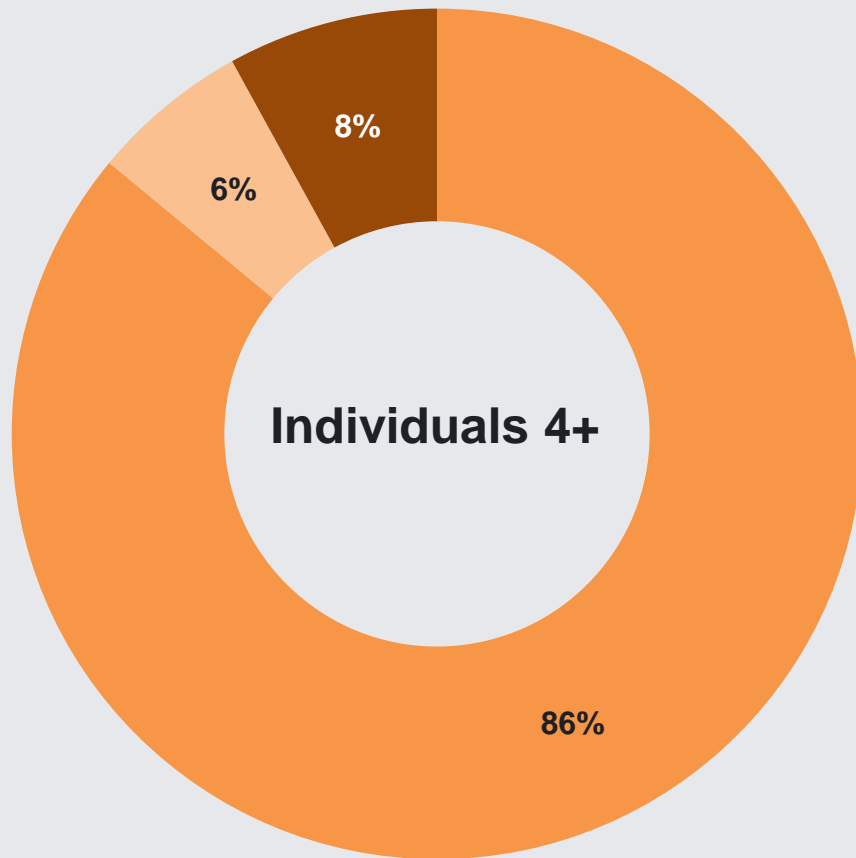


■ Live TV ■ Time Shift 7 days ■ Broadcaster VOD ■ Other Online Video

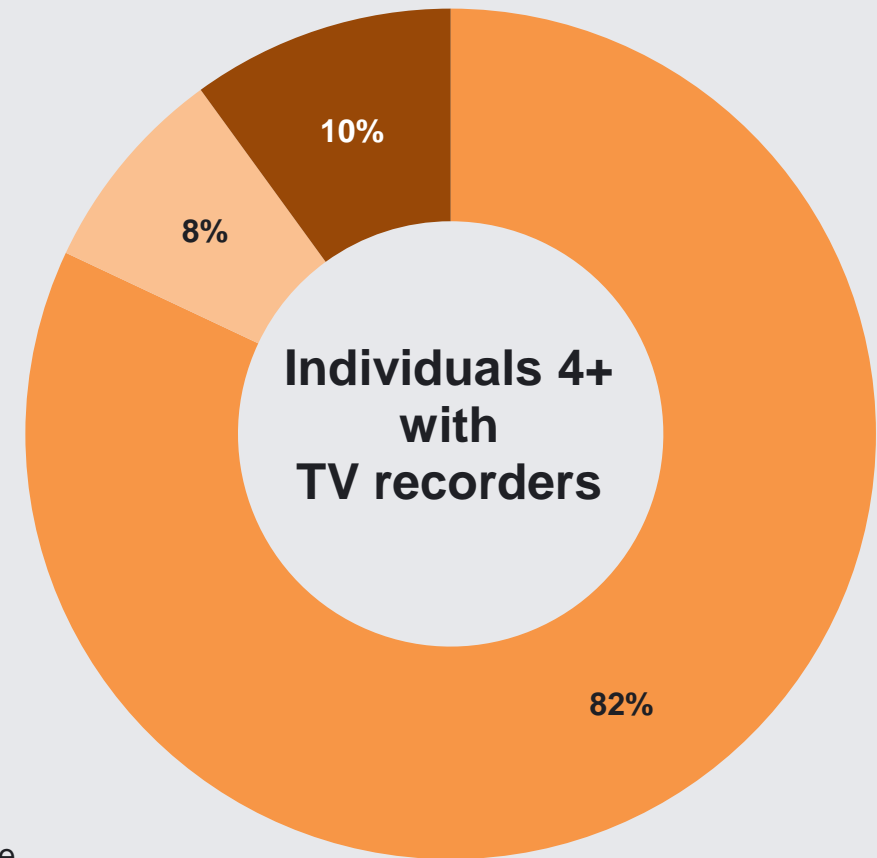
In Switzerland, 87% of TV is watched live



In the UK, 86% of TV is watched live

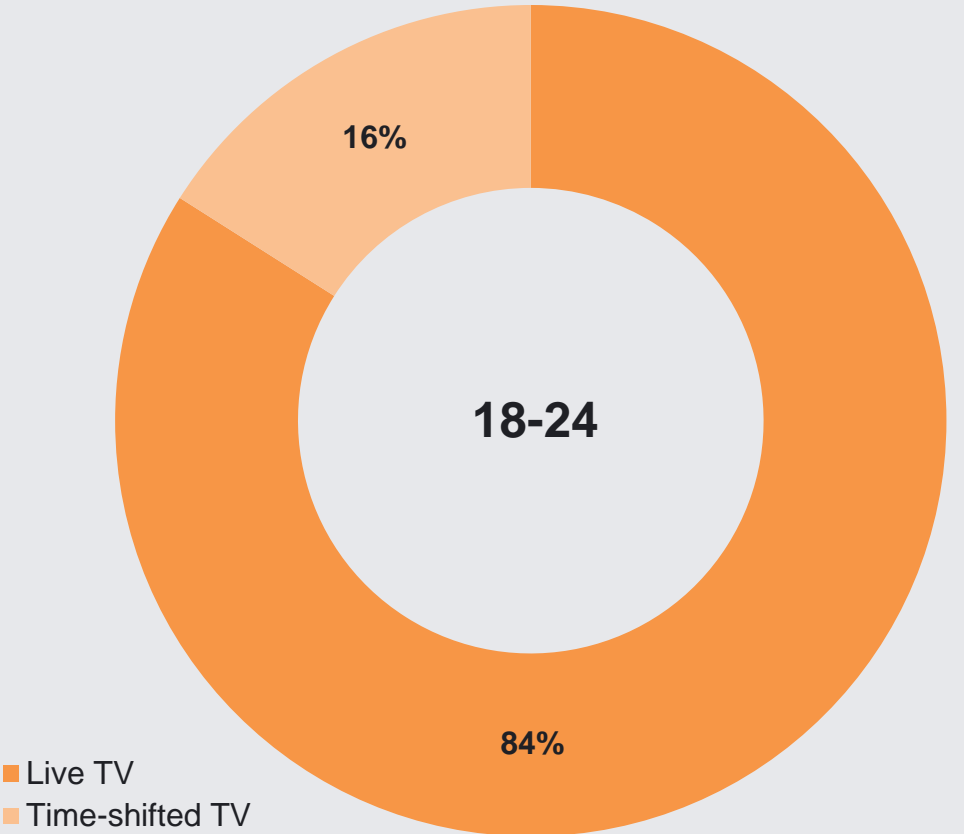
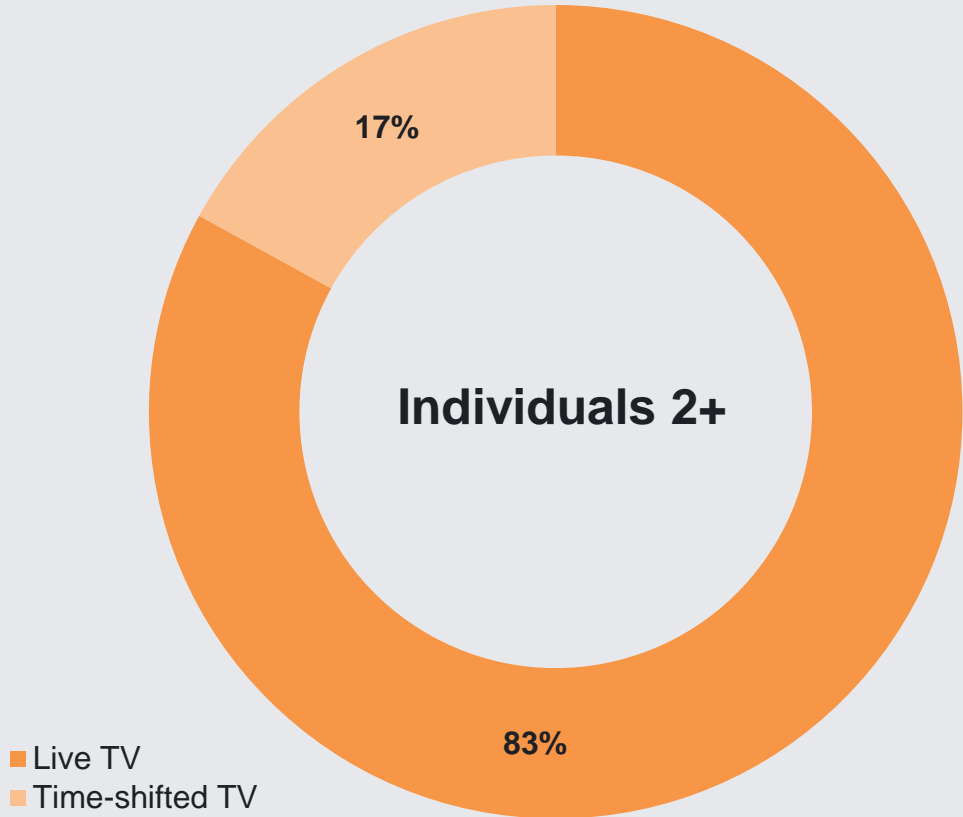


- Live
- Viewed on the same day as live (VOSDAL)
- Timeshifted viewing within 7 days



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

In the US, 83% of TV is watched live



Impact

TV is the most trusted and impactful form of advertising

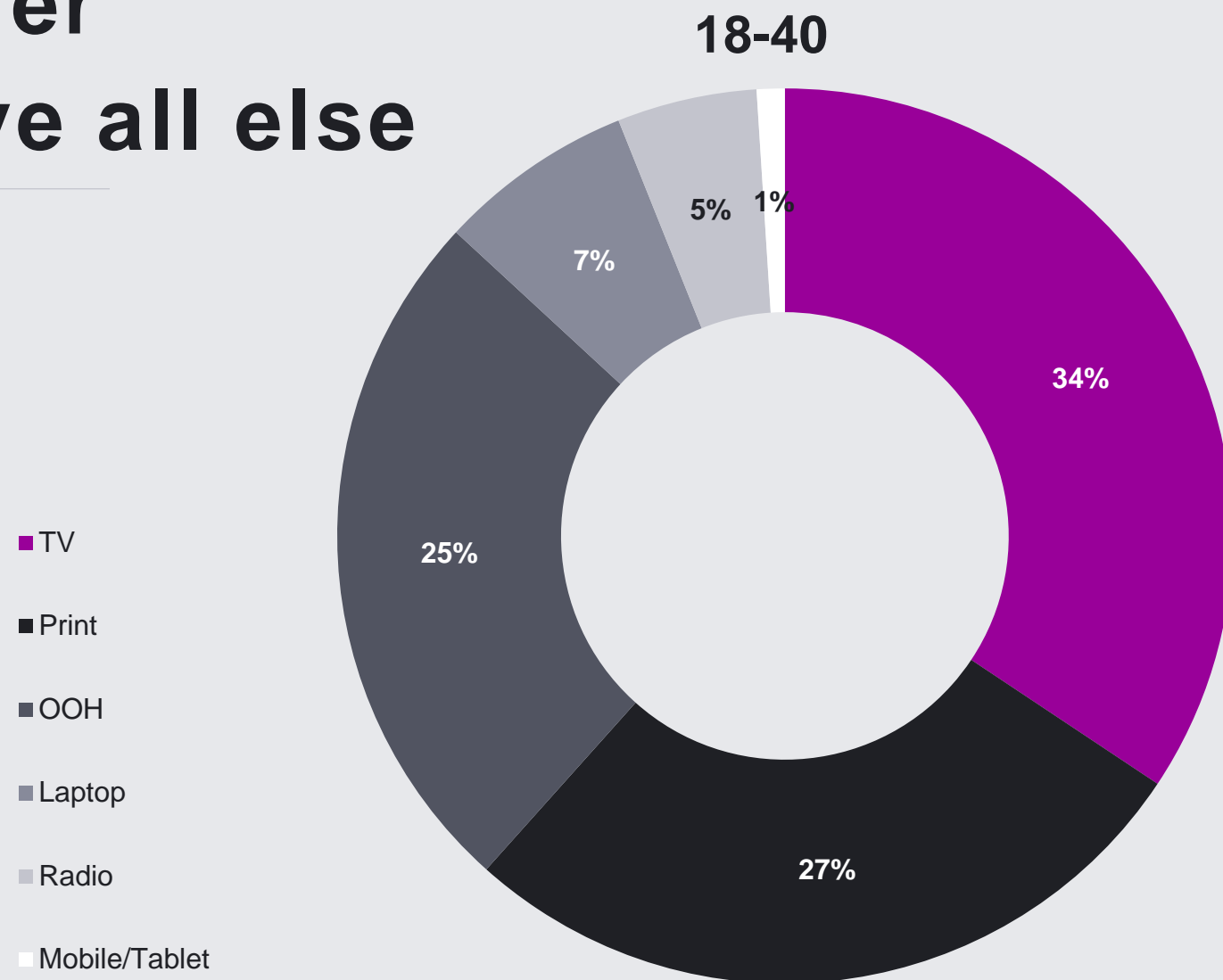


“A lot of our **campaign recall comes from TV** and not from Digital. When ads on Facebook just flow by, with TV ads we’re really able to tell our story.”

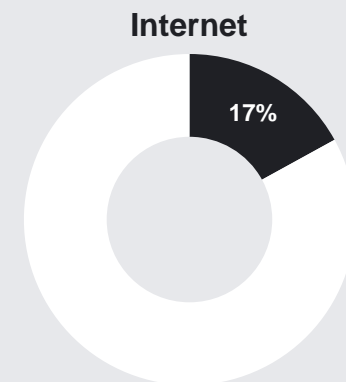
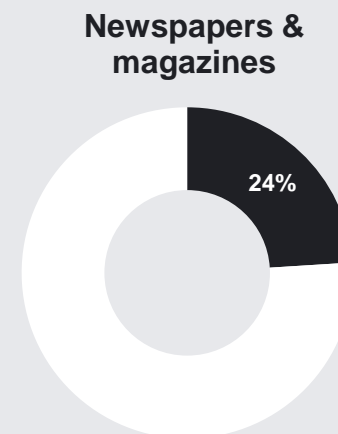
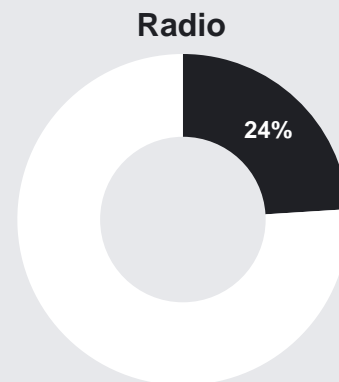
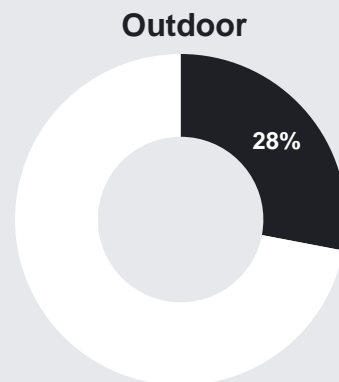
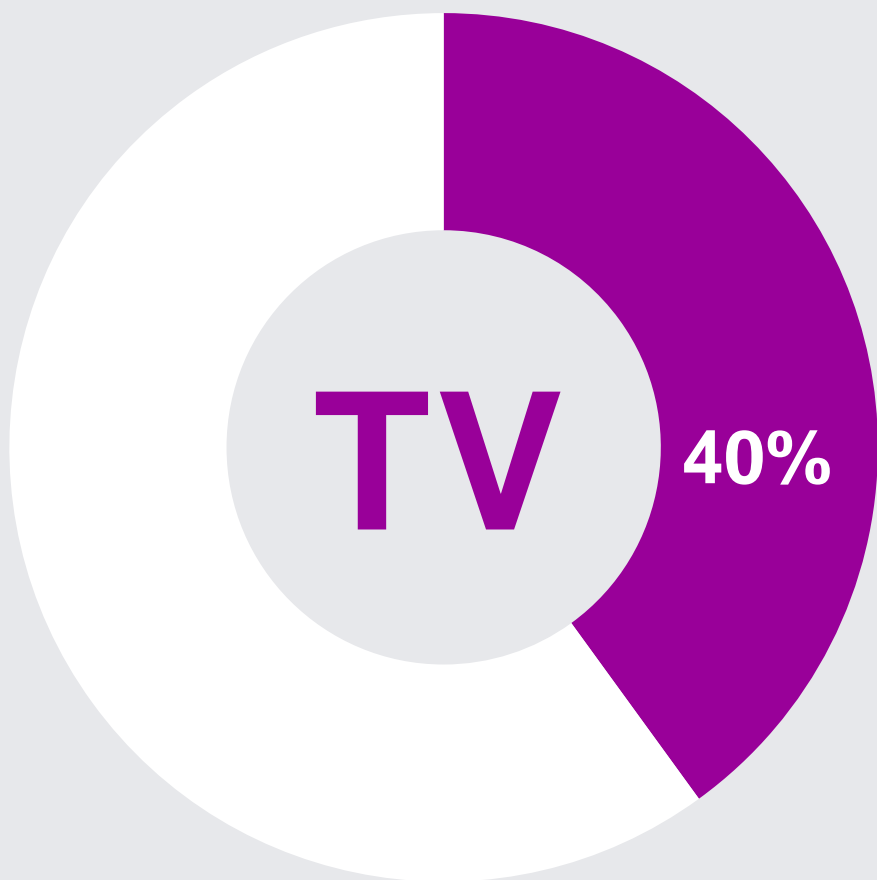
Per Carleo, Marketing Director Sweden of Volvo

June 2017

18-40 year olds prefer TV advertising above all else

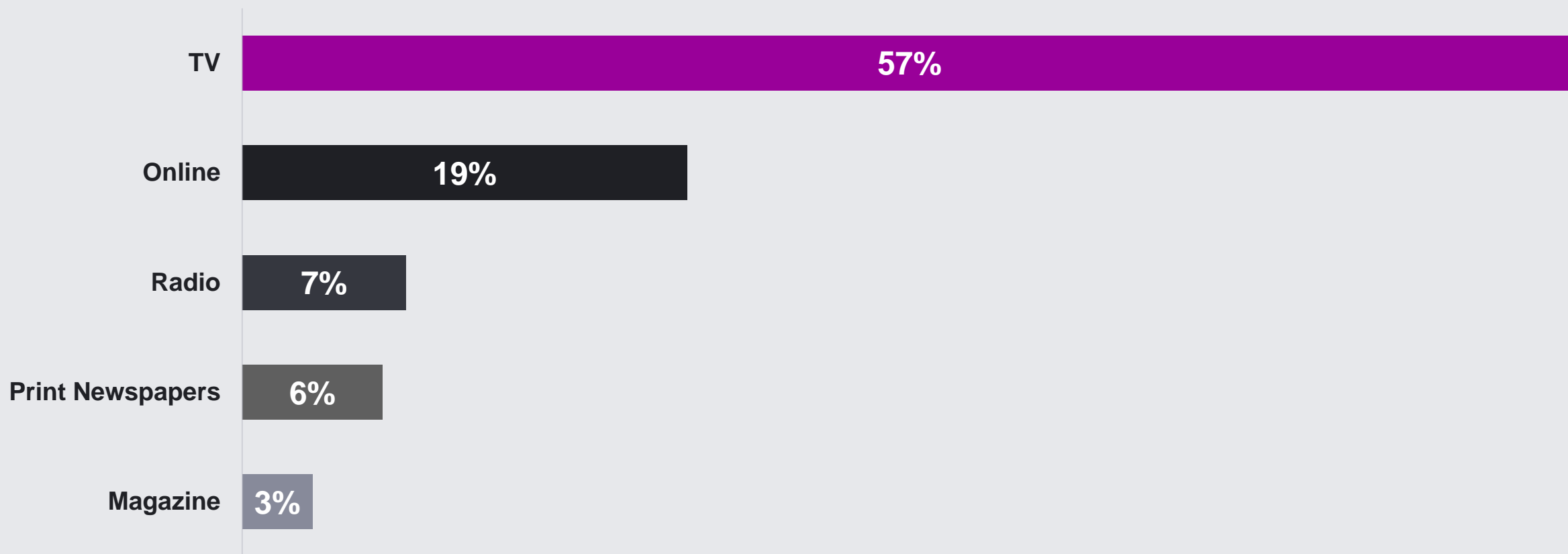


TV is by far the most useful form of advertising



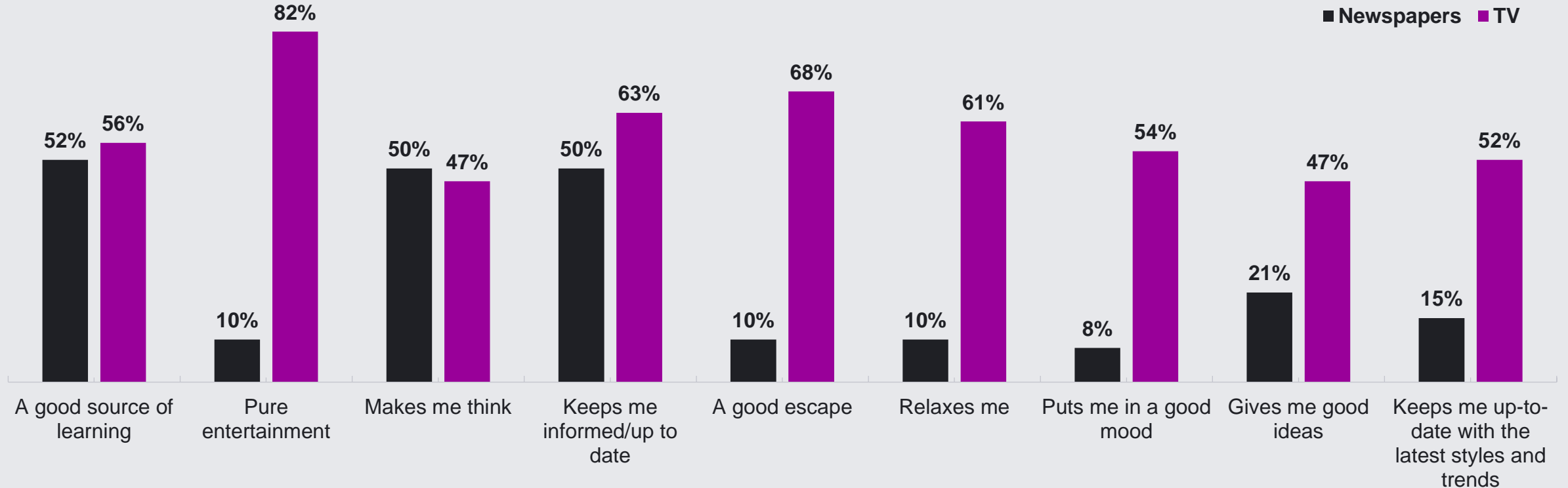
TV is our main source for news

% of adults who often get news on each platform



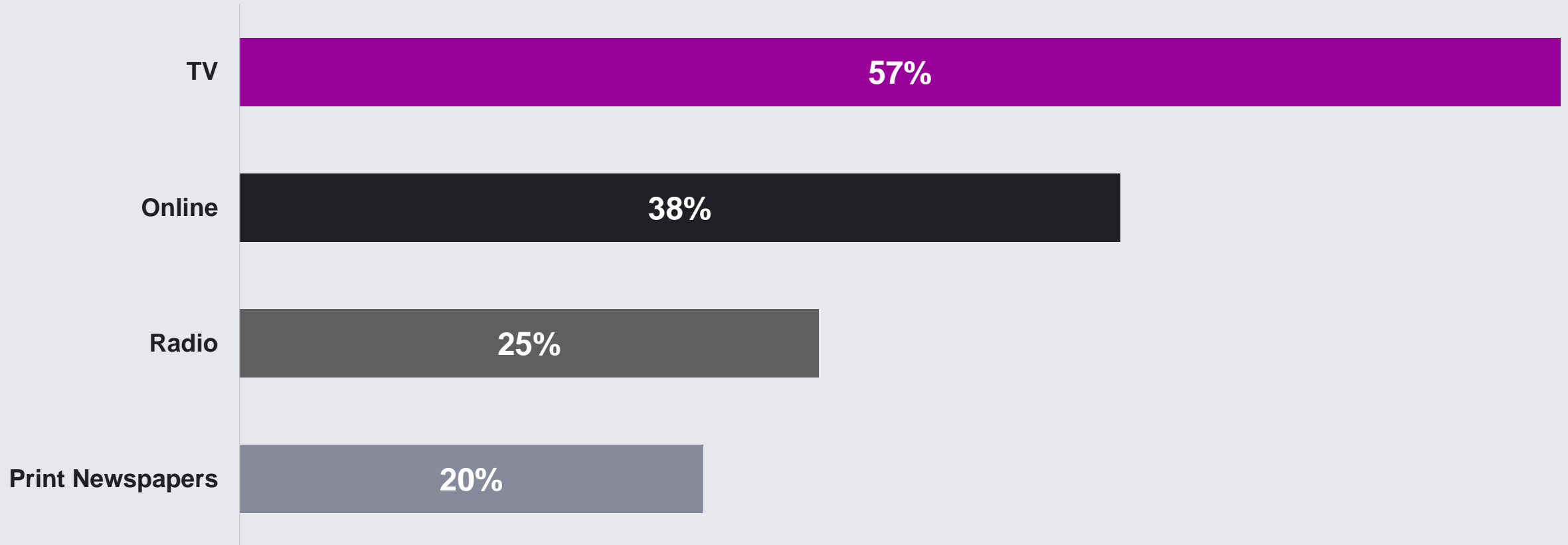
TV is more informative than newspapers

Attitudes Towards Media (Adults 18+)

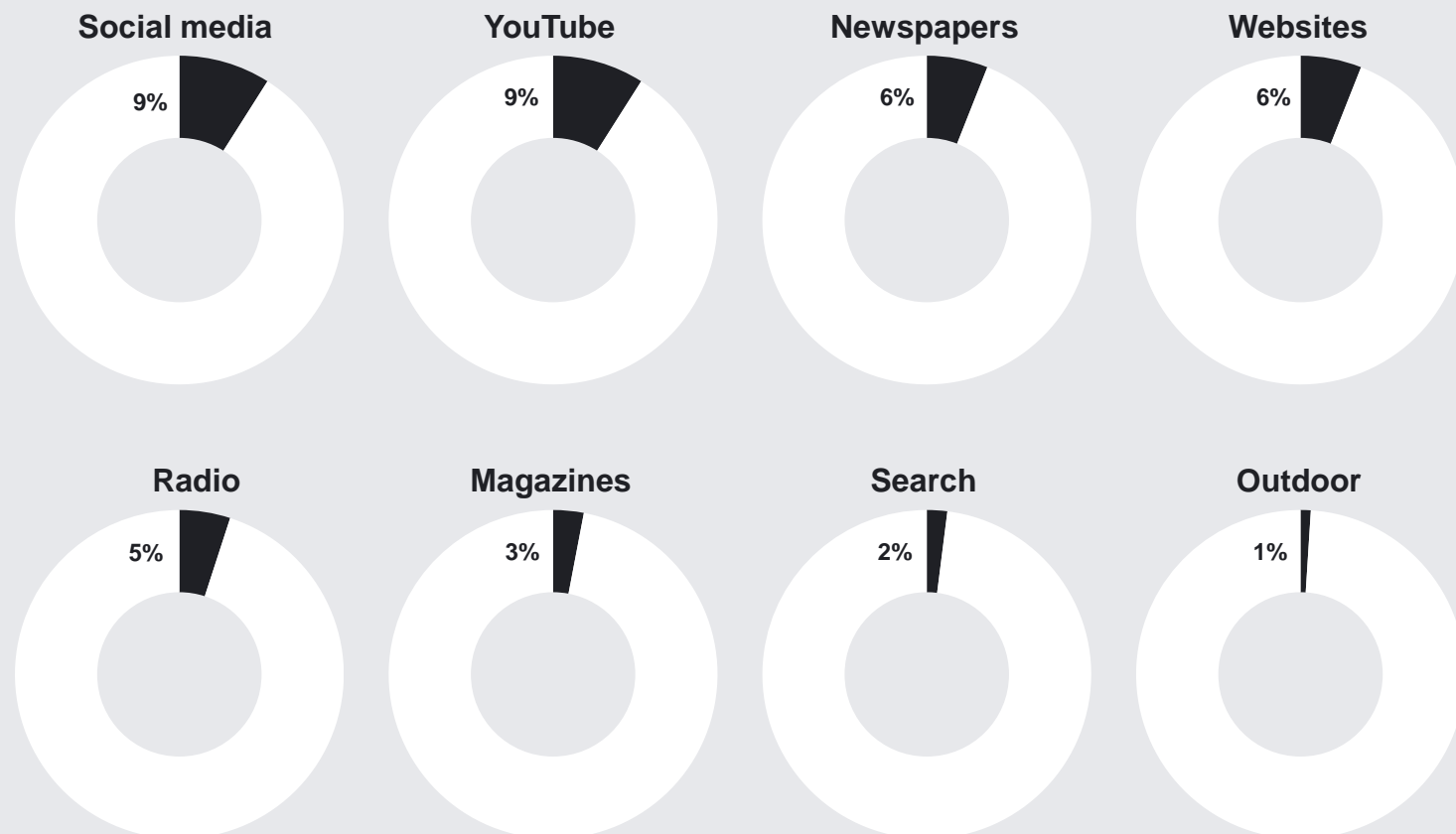
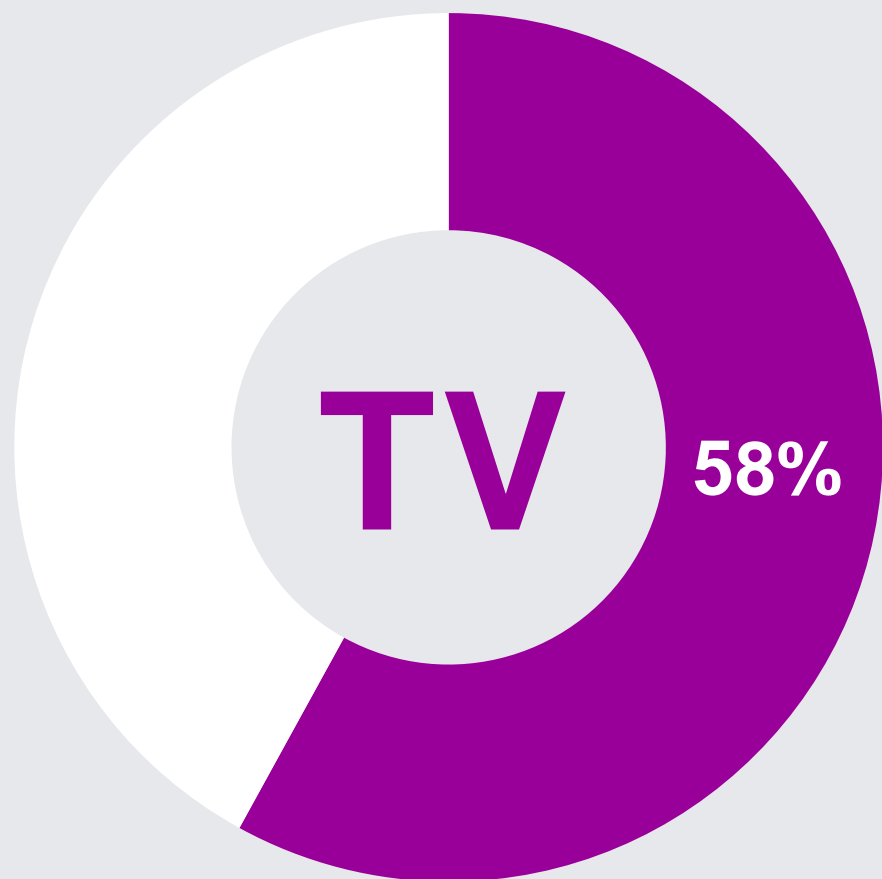


TV is our main source for news

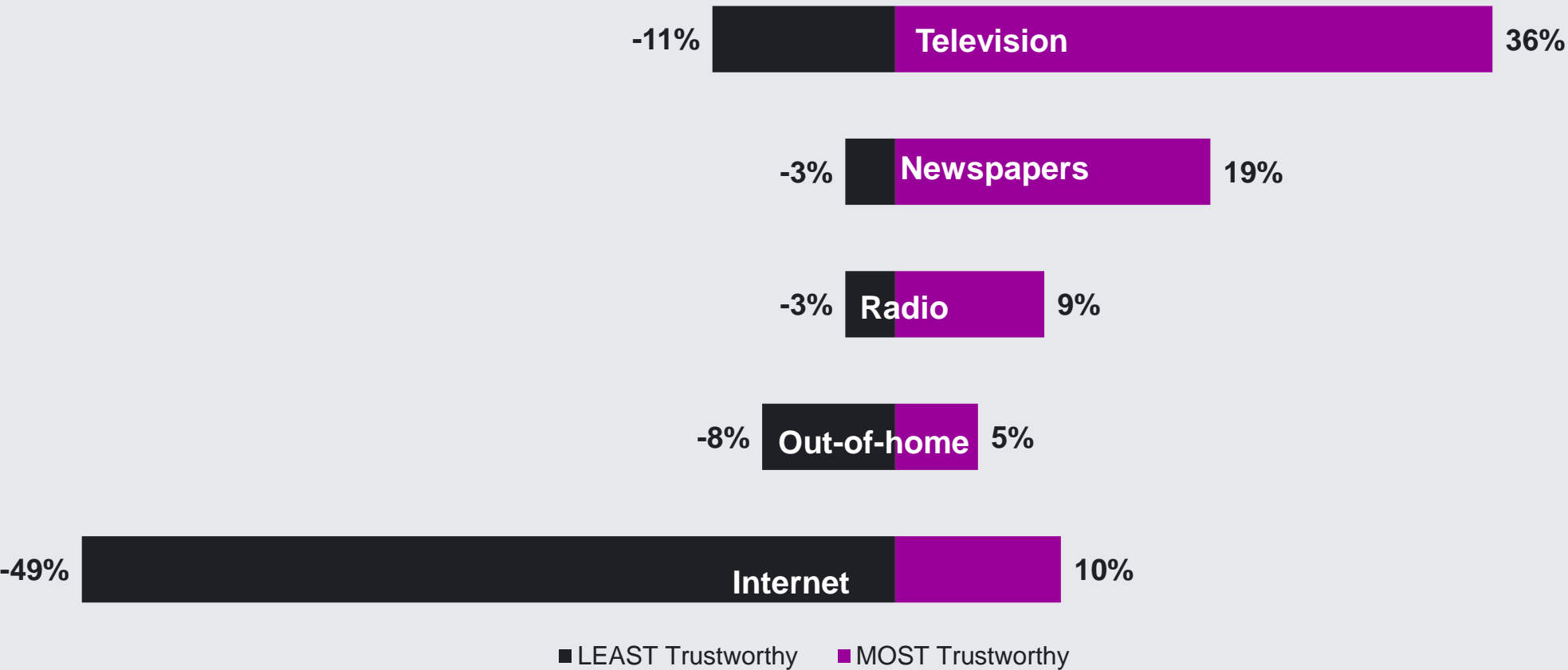
% of adults who often get news on each platform



TV ads evoke emotions more than ads in other media

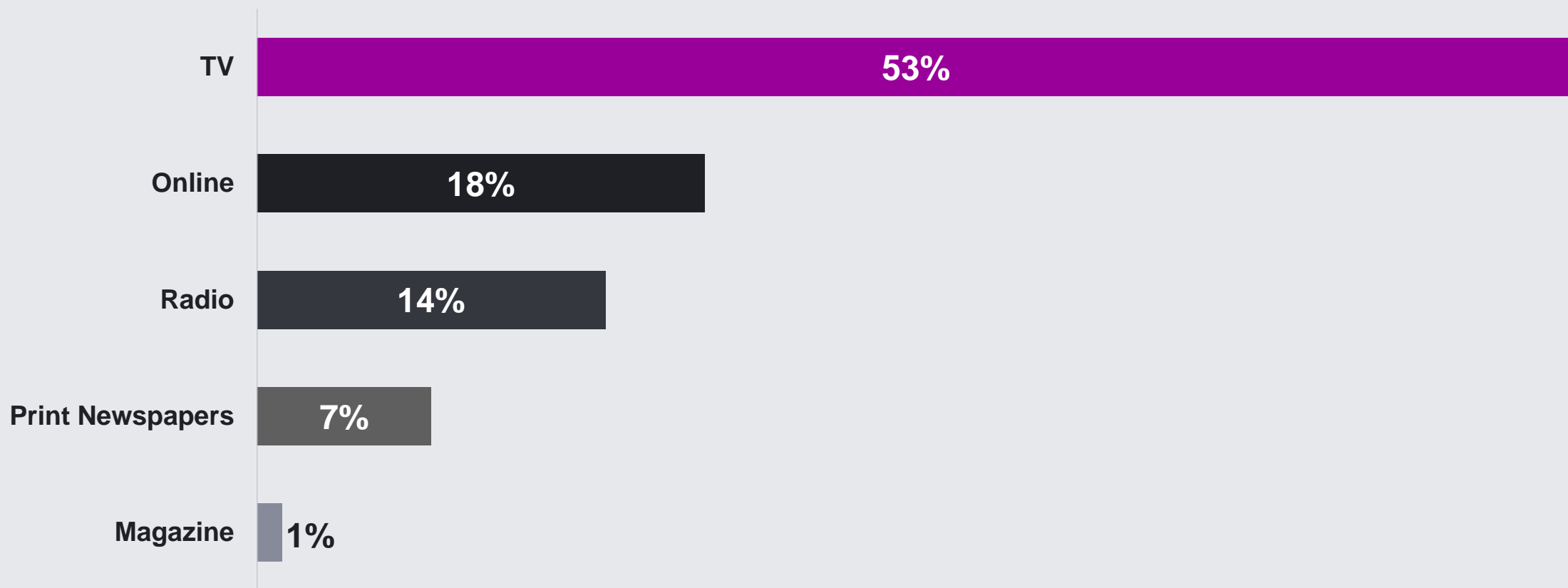


TV is by far the most trusted form of advertising

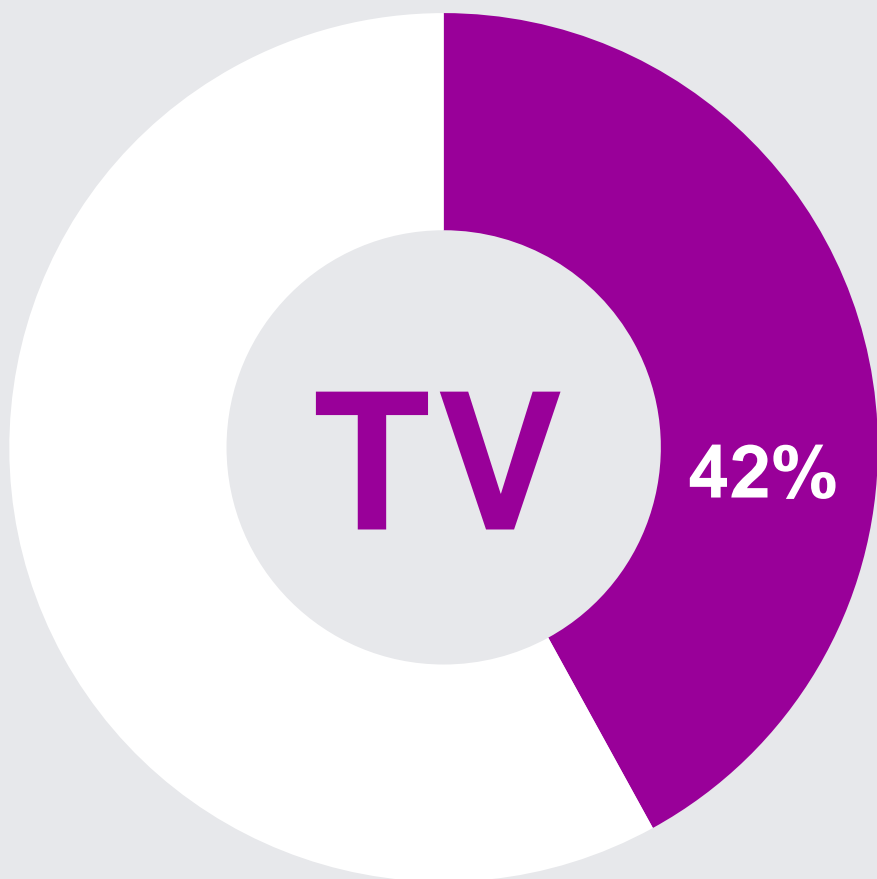


TV is by far the most trusted form of advertising

% of adults who consider the following medium as credible



TV is by far the most trusted form of advertising



Newspapers

13%

Websites

9%

Radio

8%

Magazines

8%

YouTube

6%

Social media

5%

Search

4%

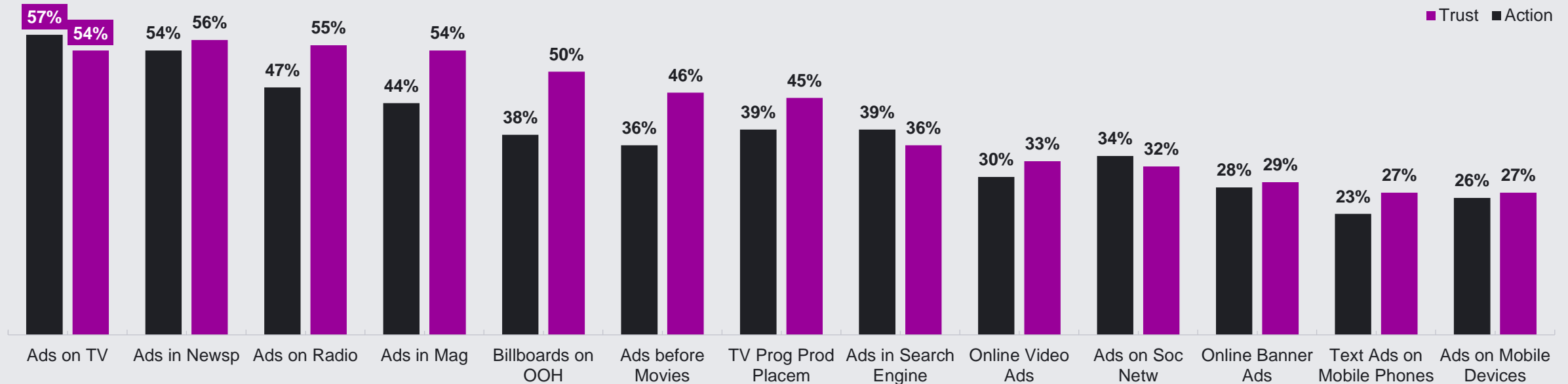
Outdoor

3%

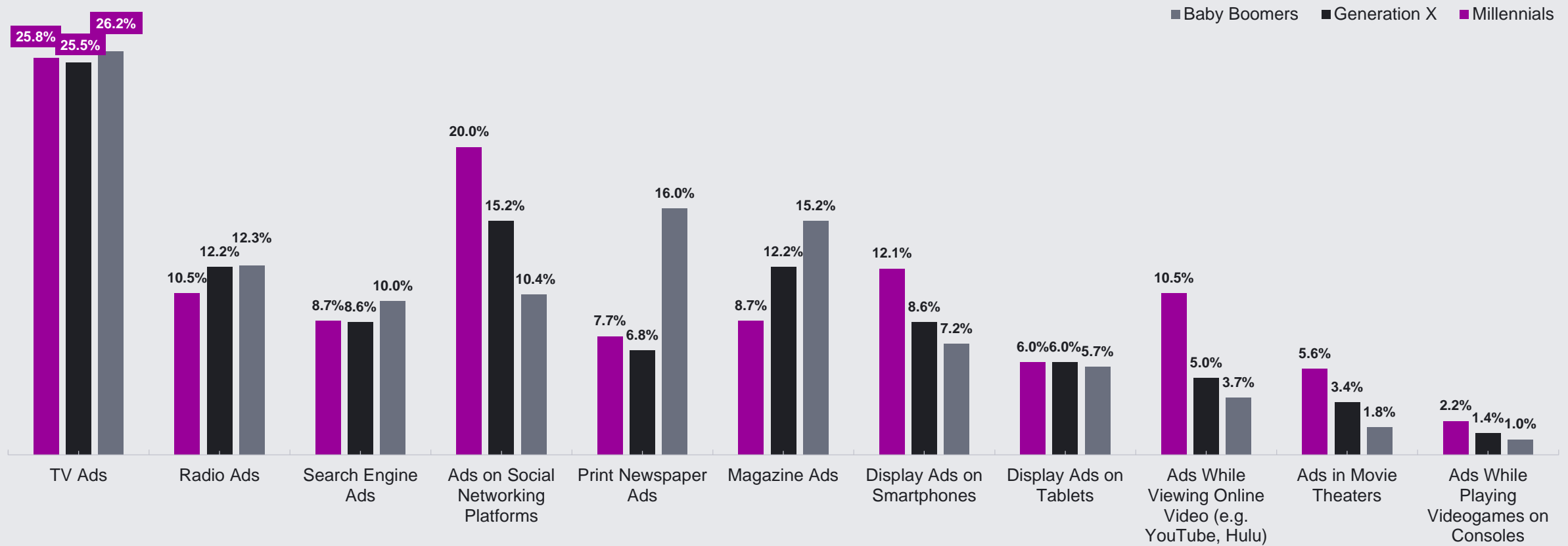
TV ads makes us act

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

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

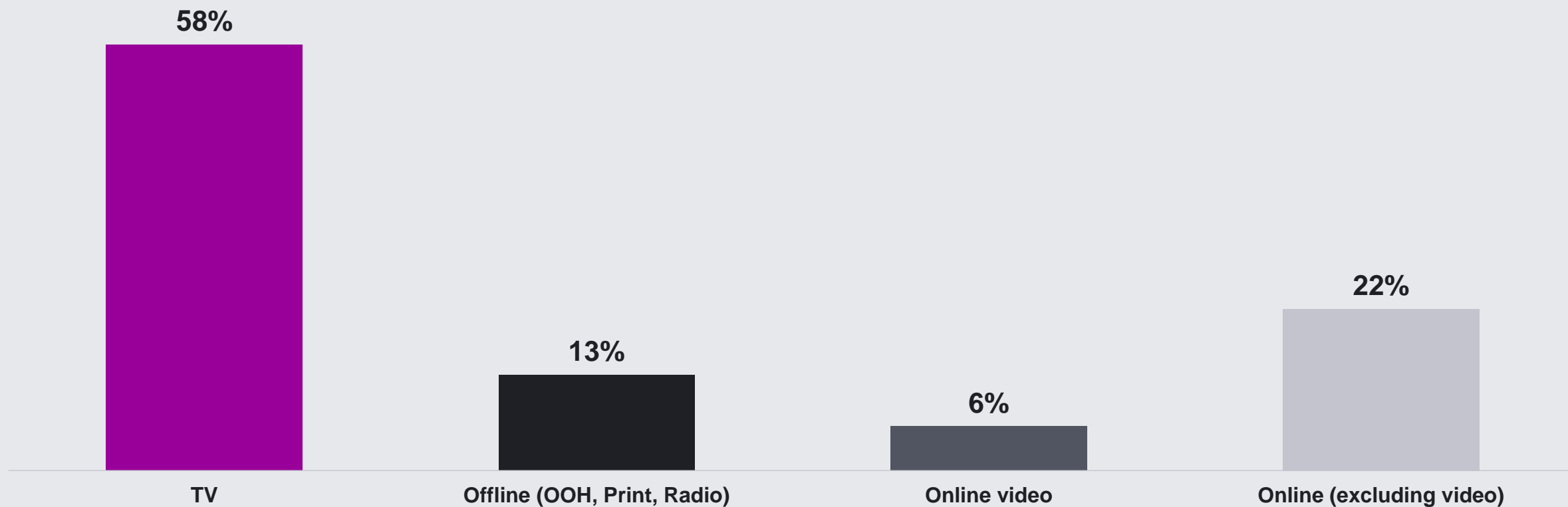


TV ads have the most influence on purchase



TV drives sales

TV has a higher impact rate than all other media combined

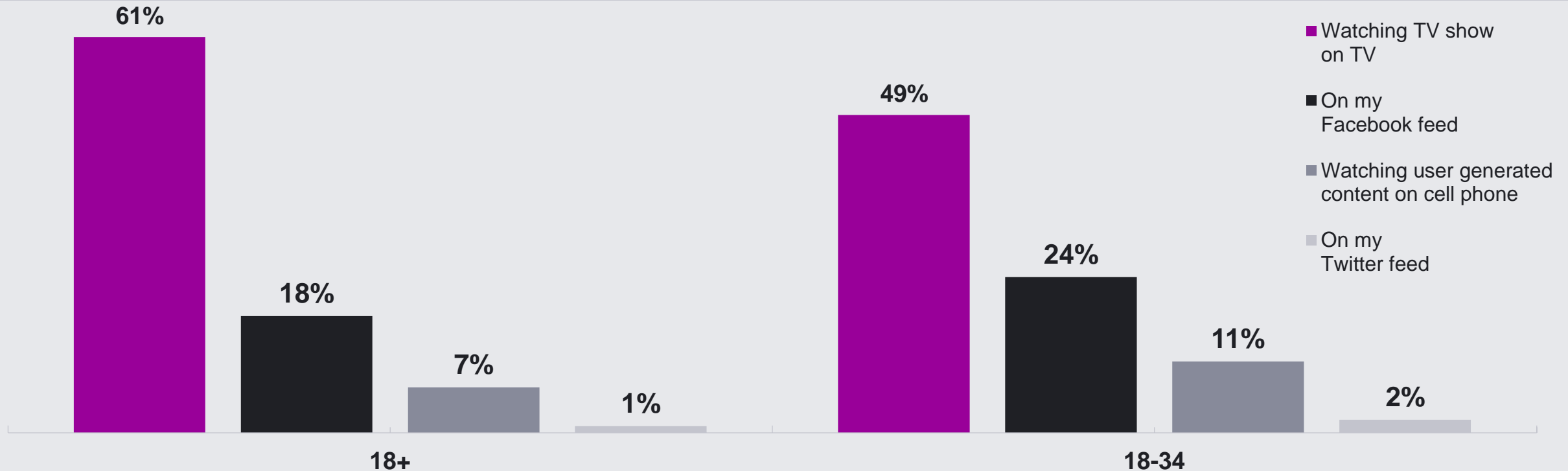


TV advertising gets the most attention

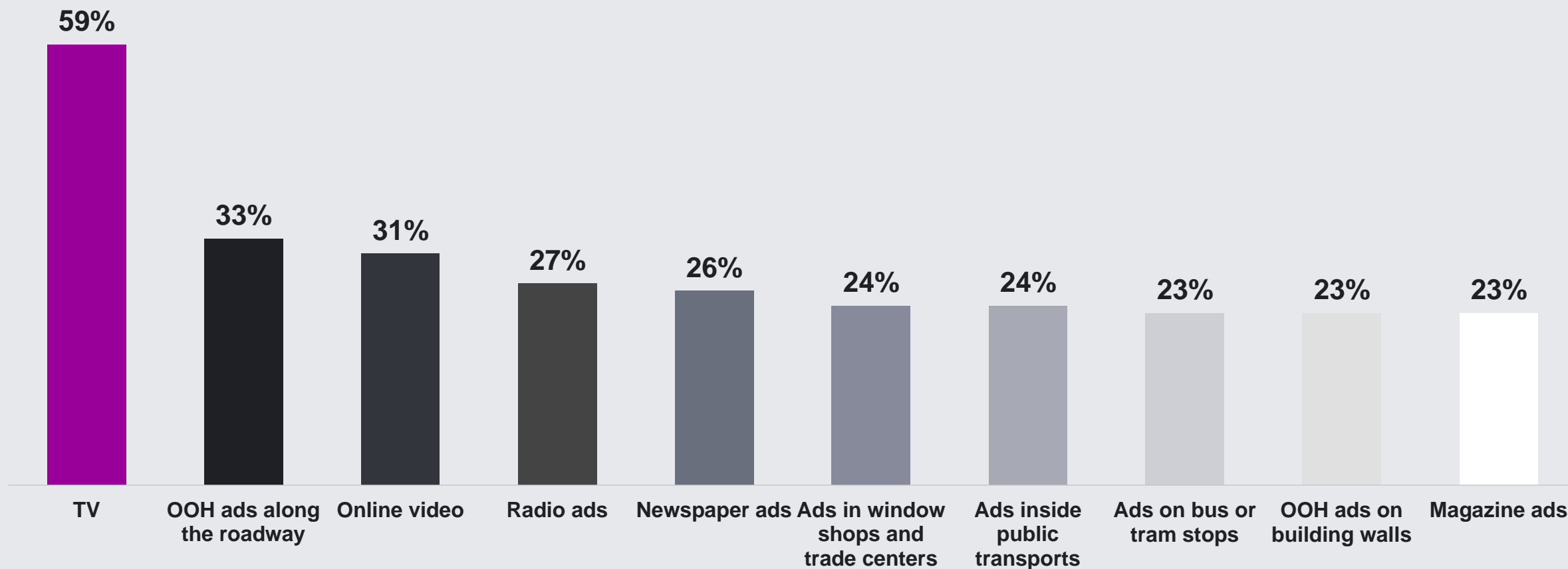
How does TV compare to video ads on other platforms?

Canadians pay most attention to video ads when viewed in TV content on a TV set.

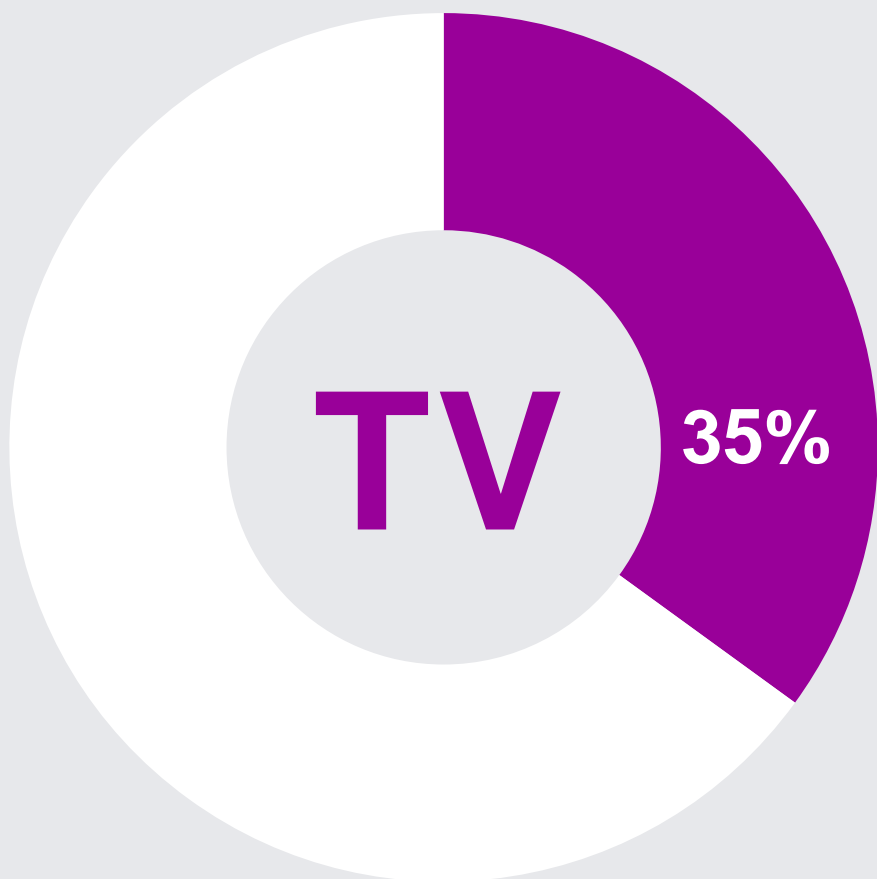
- 3x more than Facebook (2x more than Facebook for Millennials)
- 9x more than UGC on a cell phone (4.5x more for Millennials)



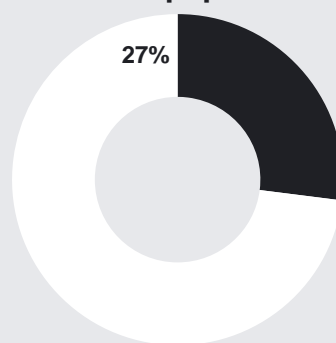
TV advertising gets the most attention



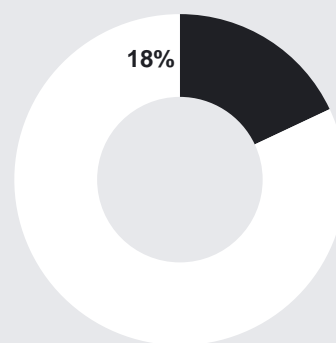
TV advertising gets the most attention



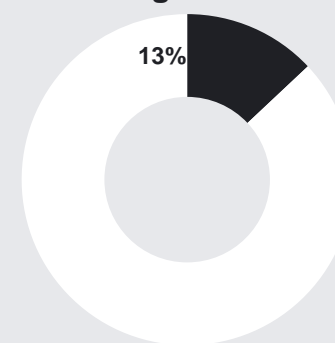
Newspapers



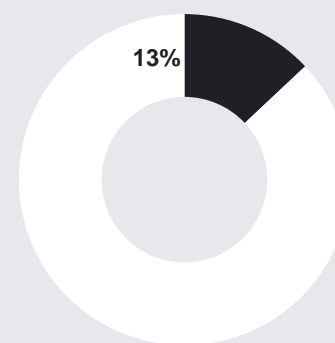
Radio



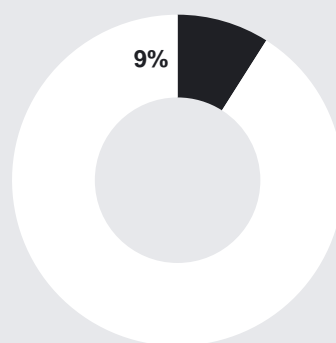
Magazines



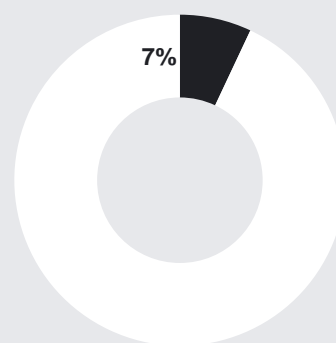
Websites



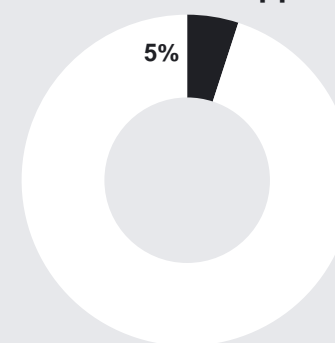
Outdoor



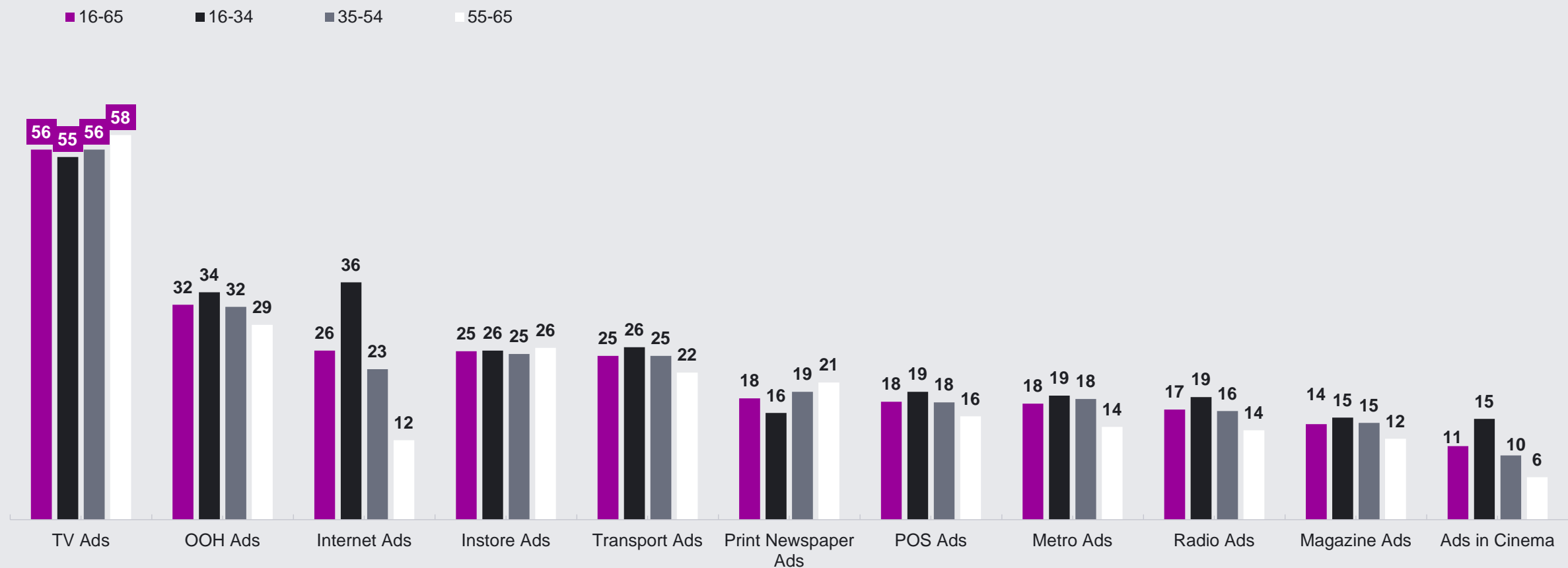
Social media



Mobile apps

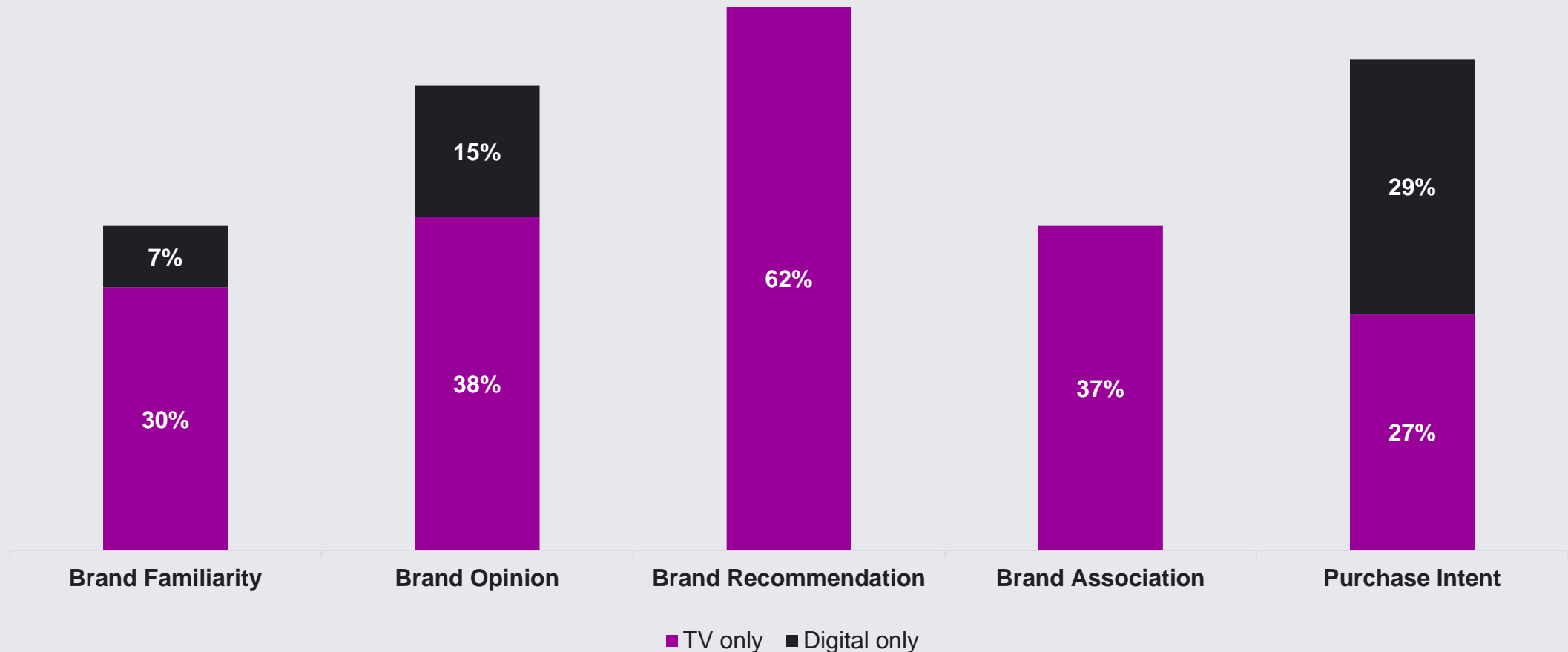


TV advertising gets the most attention



TV ads are more impactful

% Lift driven by TV only & Digital only



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



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

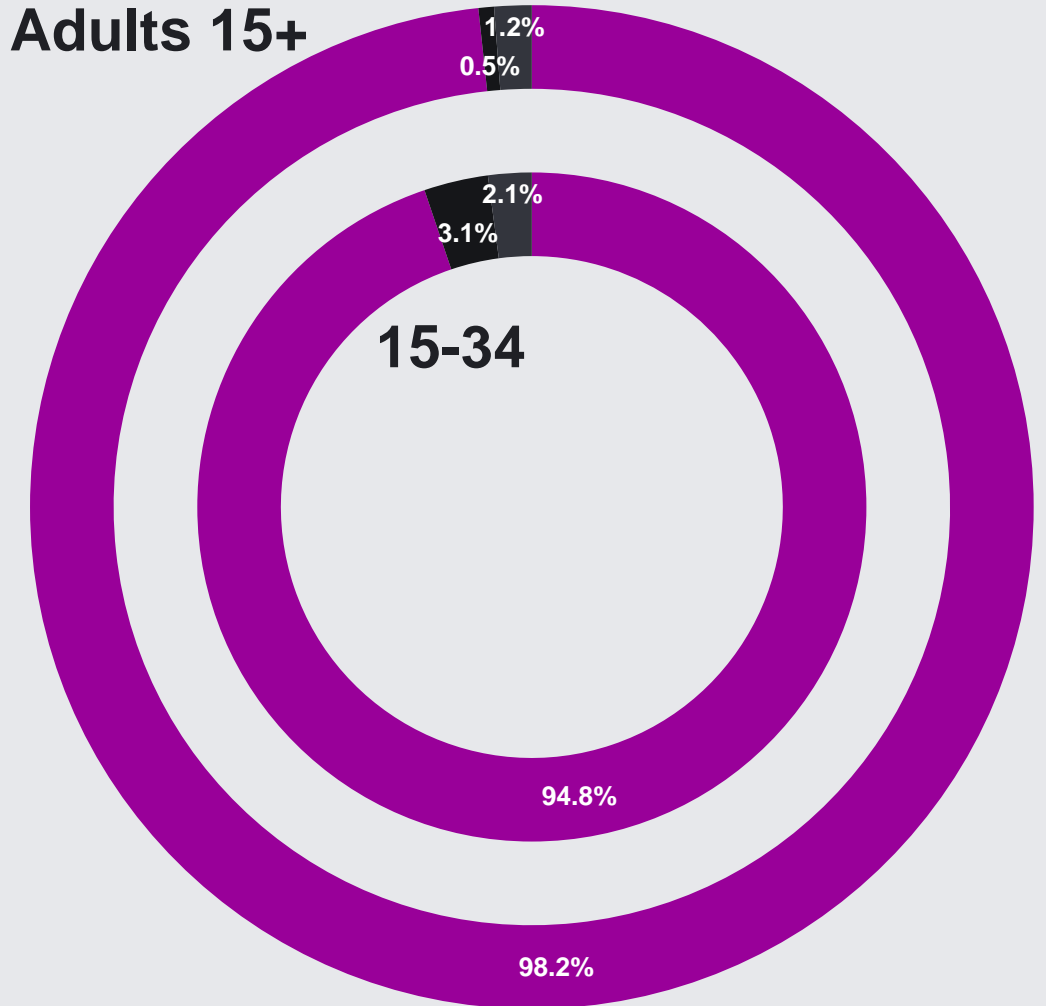
Average video advertising time per day

Adults 15+: 25 minutes

15-34: 15 minutes

- Live TV
- Others
- YouTube

Adults 15+



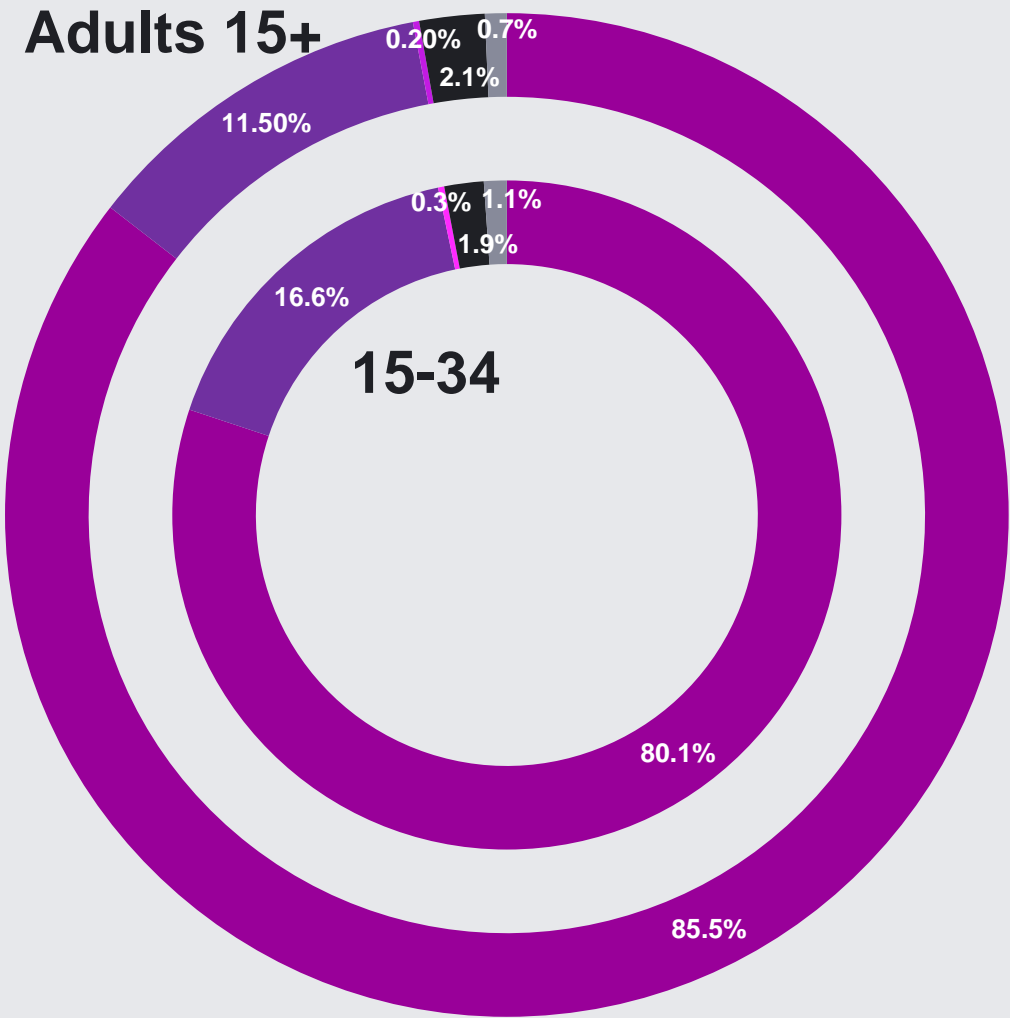
In Spain, TV accounts for 97% of all video advertising time

Average video advertising time per day

Adults 15+: 43 minutes

15-34: 36 minutes

- Live TV
- Time shifted 7 days
- Broadcaster VOD
- Other online video
- YouTube



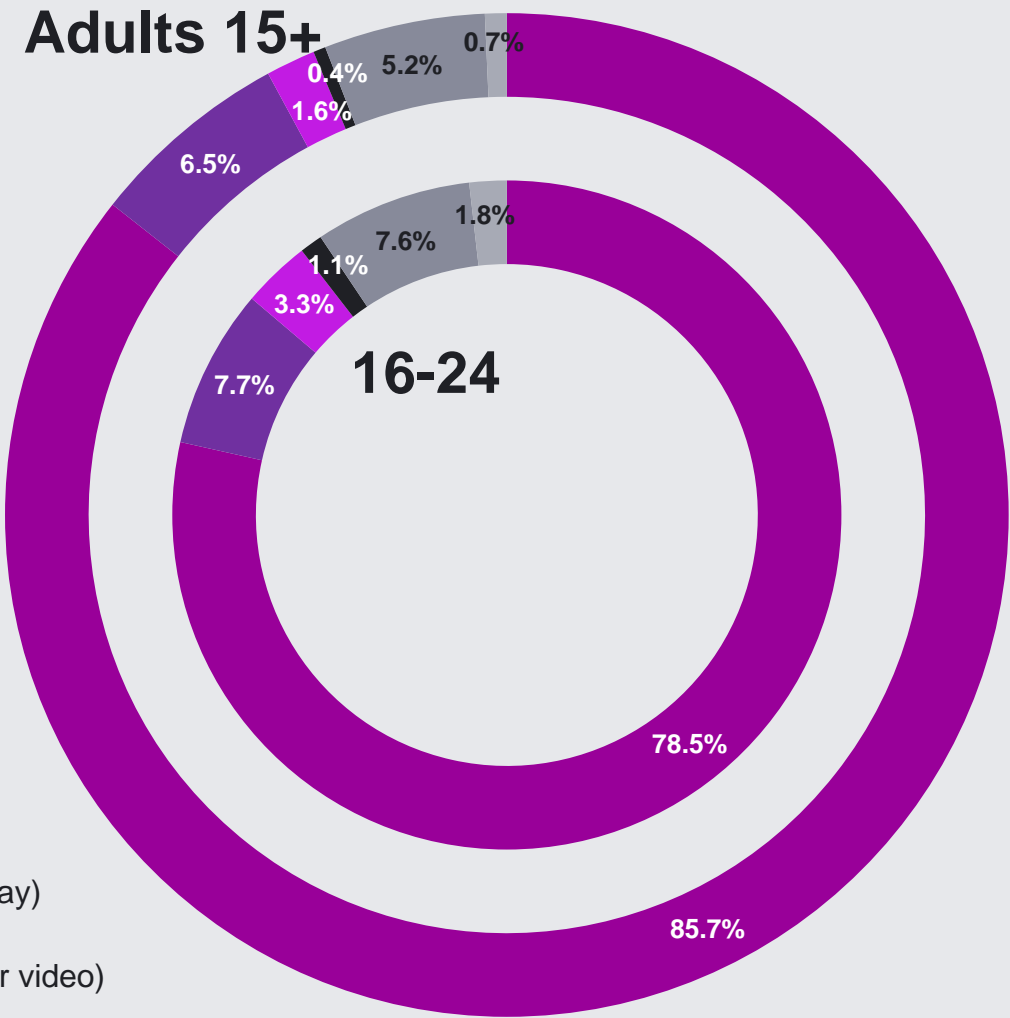
In the UK, TV accounts for 94% of all video advertising time

Average video advertising time per day

All individuals: 20 minutes

16-24: 13 minutes

- Live TV
- Playback TV
- Broadcaster TV
- Cinema
- Other online (including autoplay)
- YouTube (estimate 15 sec per video)



Effectiveness

Advertisers invest in TV advertising because it pays back

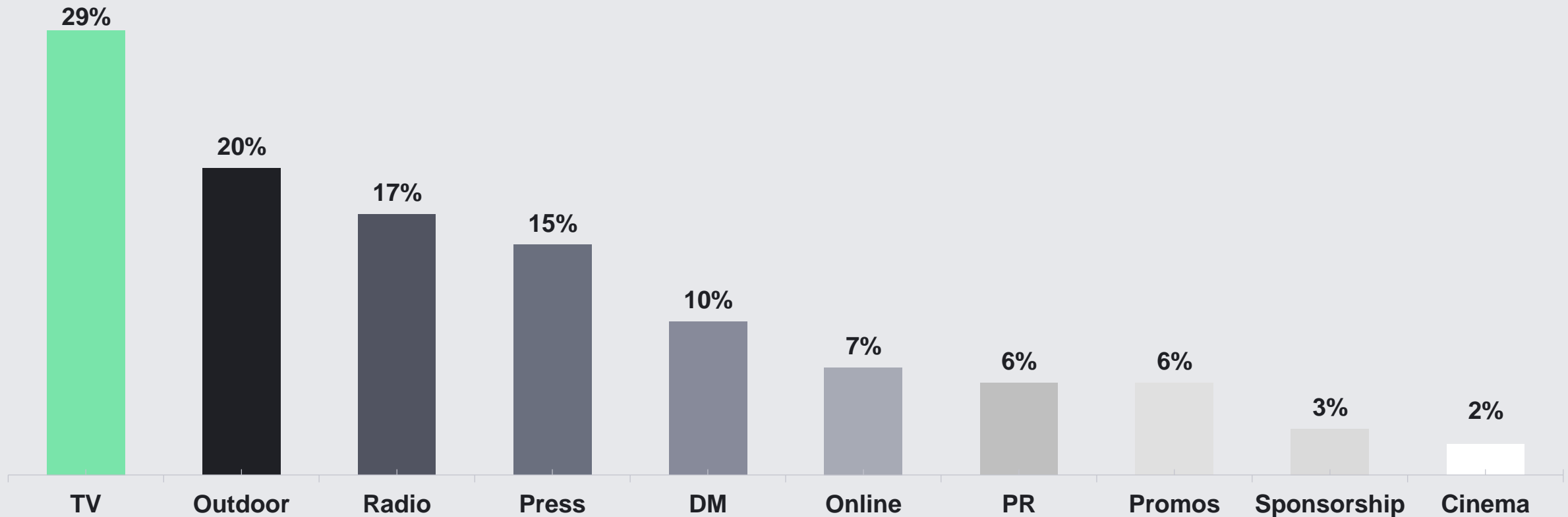
“When we run a heavy TV schedule, we see a **lift in sales and product awareness**. We need to run two weeks of digital to get the reach of one day of broadcast.”

Rich Lehrfeld, Senior VP-global Brand Marketing and Communications of American Express

April 2016

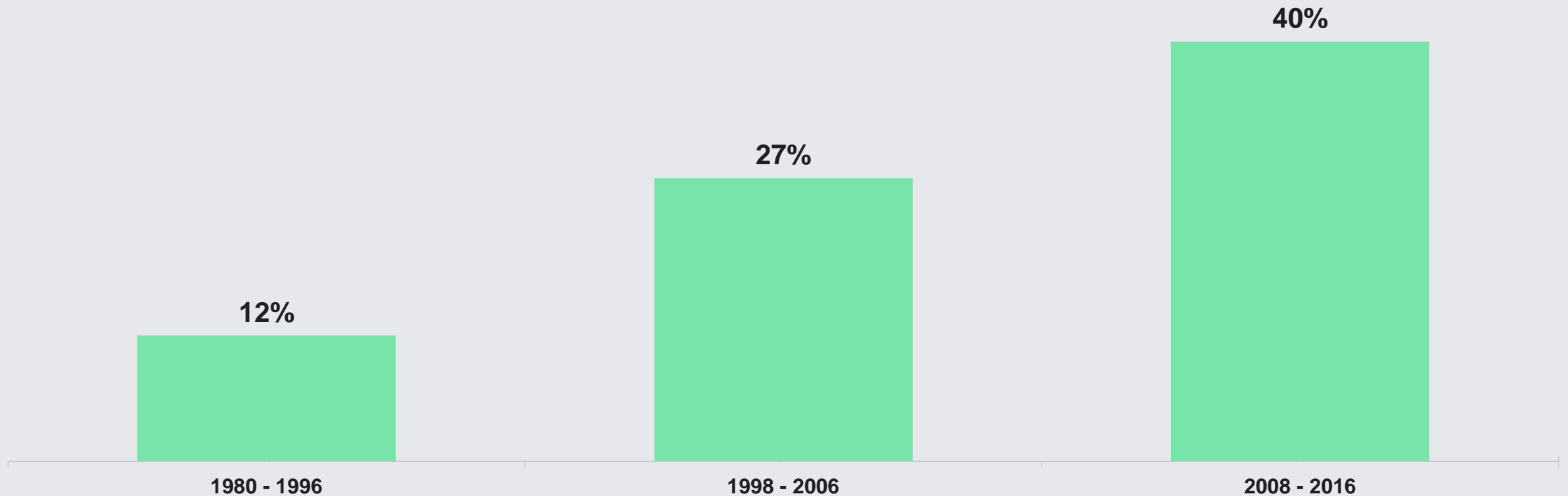
TV is the most effective medium

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

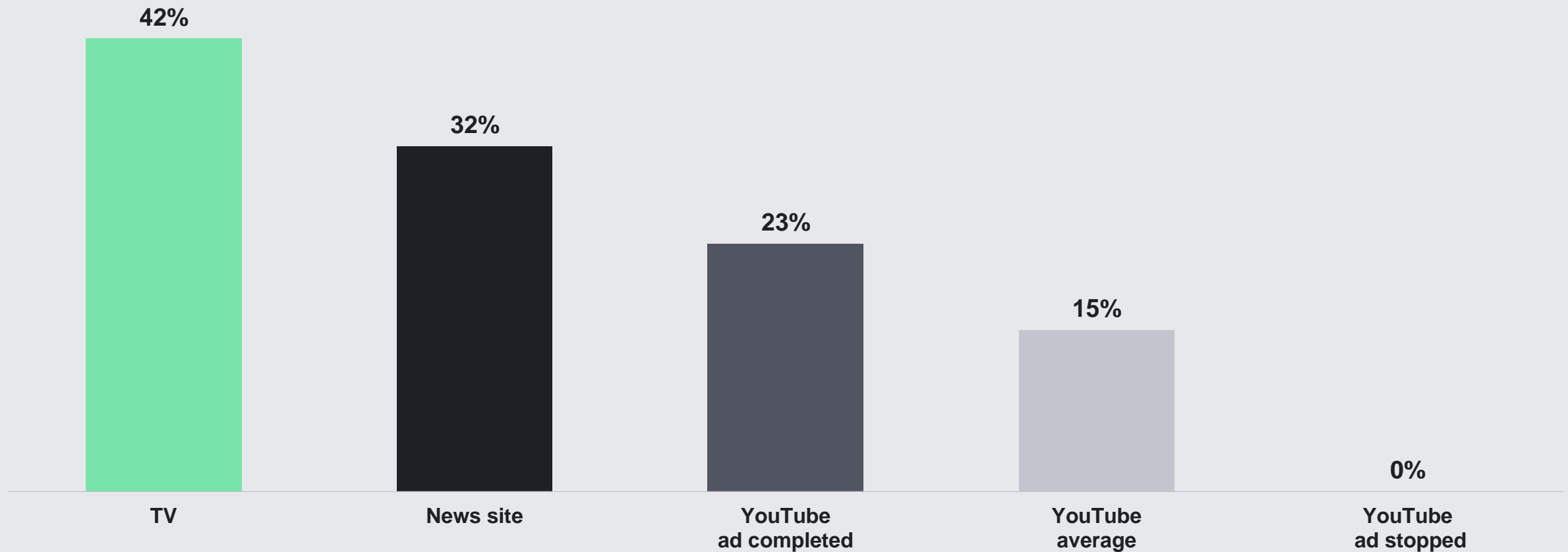


TV is becoming more effective

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

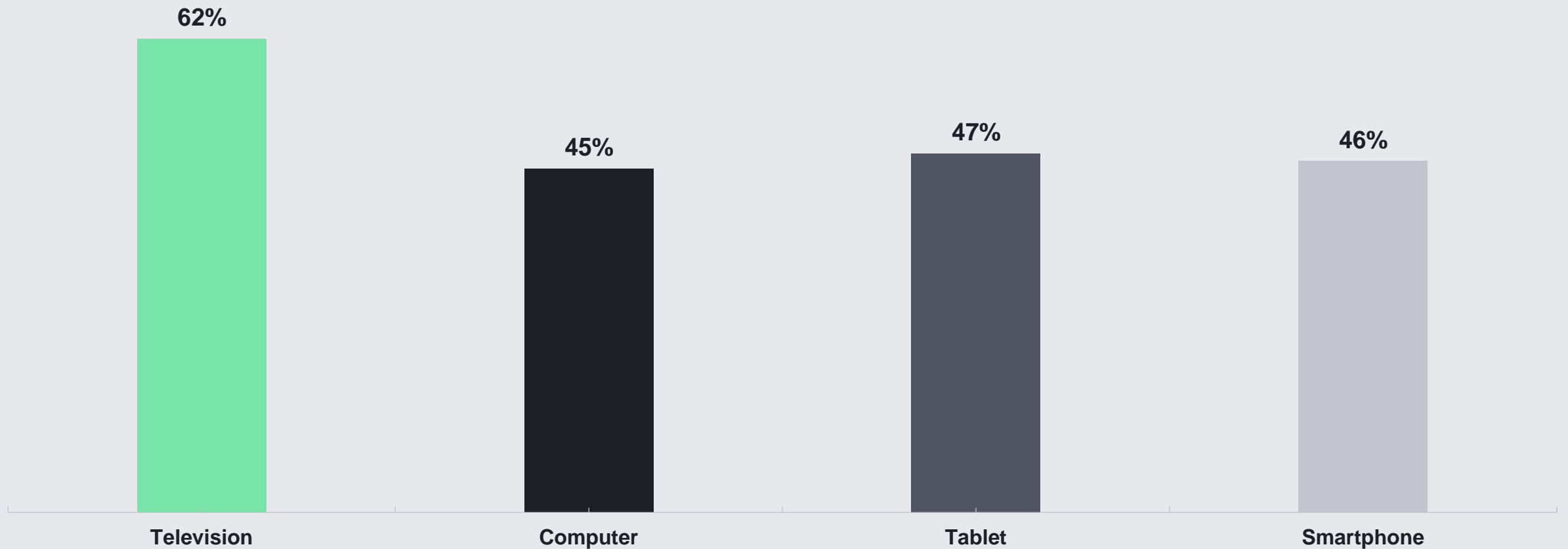


TV generates almost thrice the brand recall of YouTube



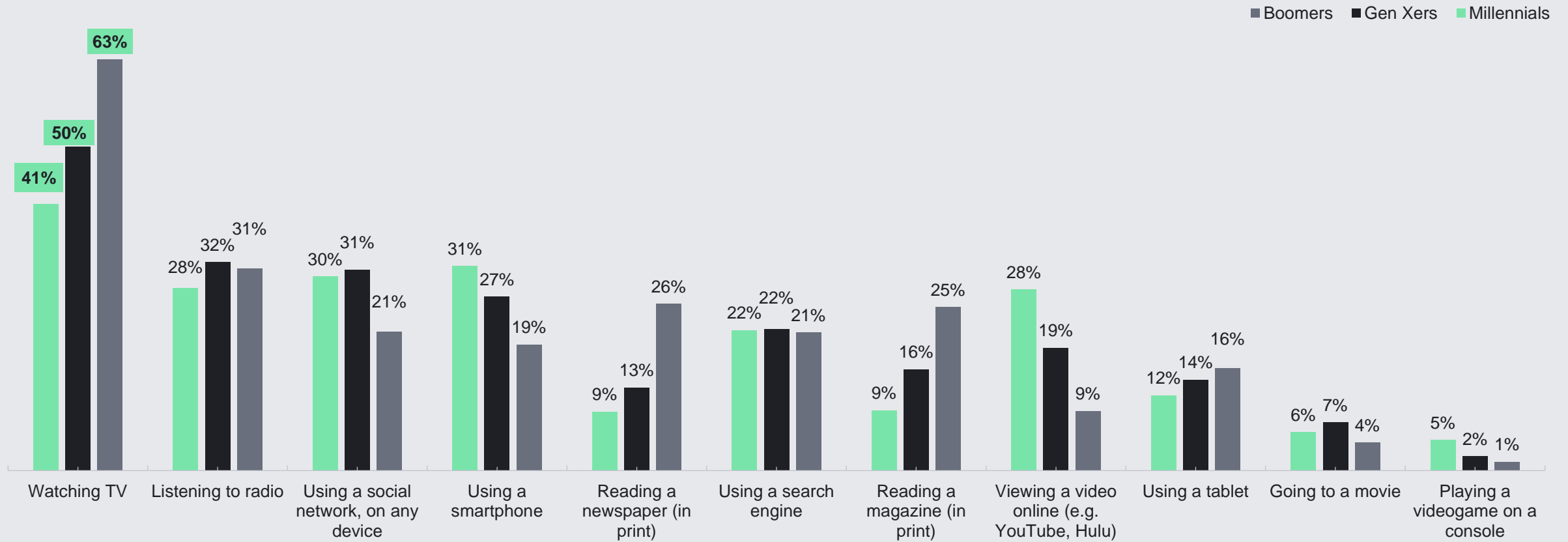
TV ads are the best for brand recall

Percent who correctly recall half or more of advertisers



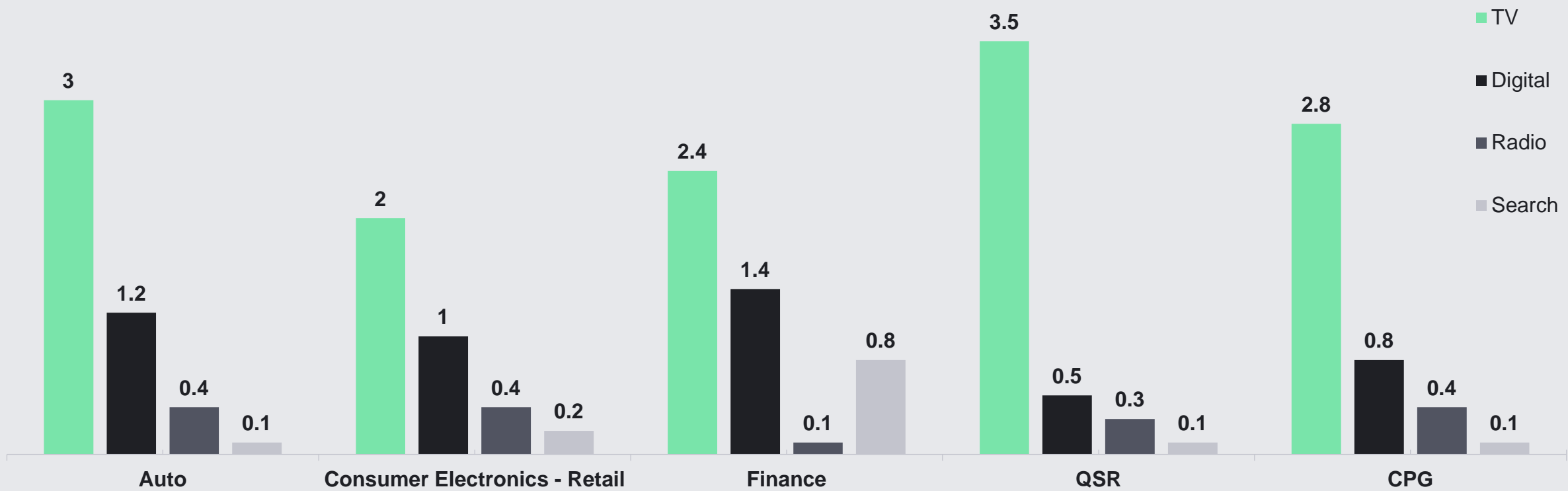
TV ads are the best for brand recall

Q: During the past week, do you recall noticing any specific advertisers when:



TV is the most efficient medium to drive sales

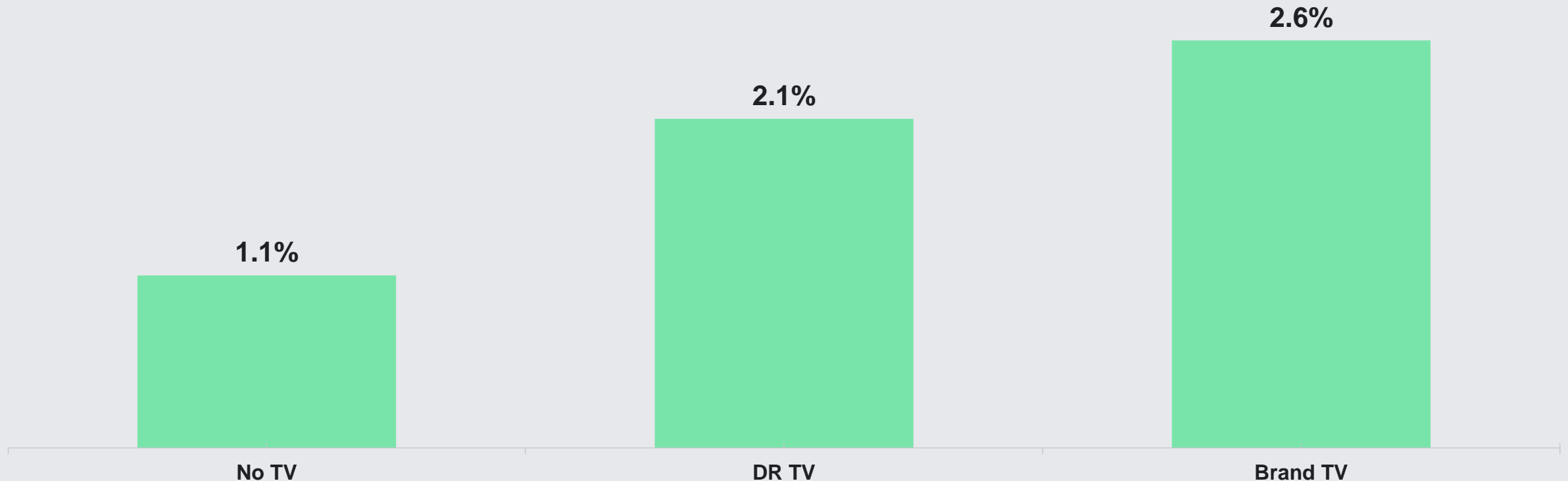
Relative lift factor on outcomes



TV is the best media for market share growth

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

Average market share points gained per annum



TV drives traffic to the web

- TV ads boost brands' organic traffic*
- The organic traffic of an advertiser's website during a TV campaign increases by 44%
- This increase applies to pure players as well as multichannel advertisers

	All advertisers	Pure-players	Multichannel advertisers
Campaigns	220	142	78
Advertisers	80	50	30
GRP (campaign average)	339	340	336
Average organic traffic increase in %	43.9%	43.5%	44.6%

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

Monthly website unique visitors comparison (in thousands)

Company	Month prior to TV launch	Monthly average: TV launch-Feb 2017	% increase
23andMe	421	968	+130%
Airbnb	1,442	5,872	+307%
Birchbox	1,122	2,221	+98%
Blue Apron	159	1,872	+1,075%
Casper	131	512	+292%
Fitbit	4,598	14,247	+210%
Letgo	N/A	10,201	↑
Lyft	7,920	13,048	+65%
Nest	N/A	1,576	↑
Simplisafe	145	557	+284%
Sling	2,143	3,842	+79%
SoFi	248	593	+139%
Uber	N/A	30,955	↑
Yelp	77,900	86,755	+11%

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

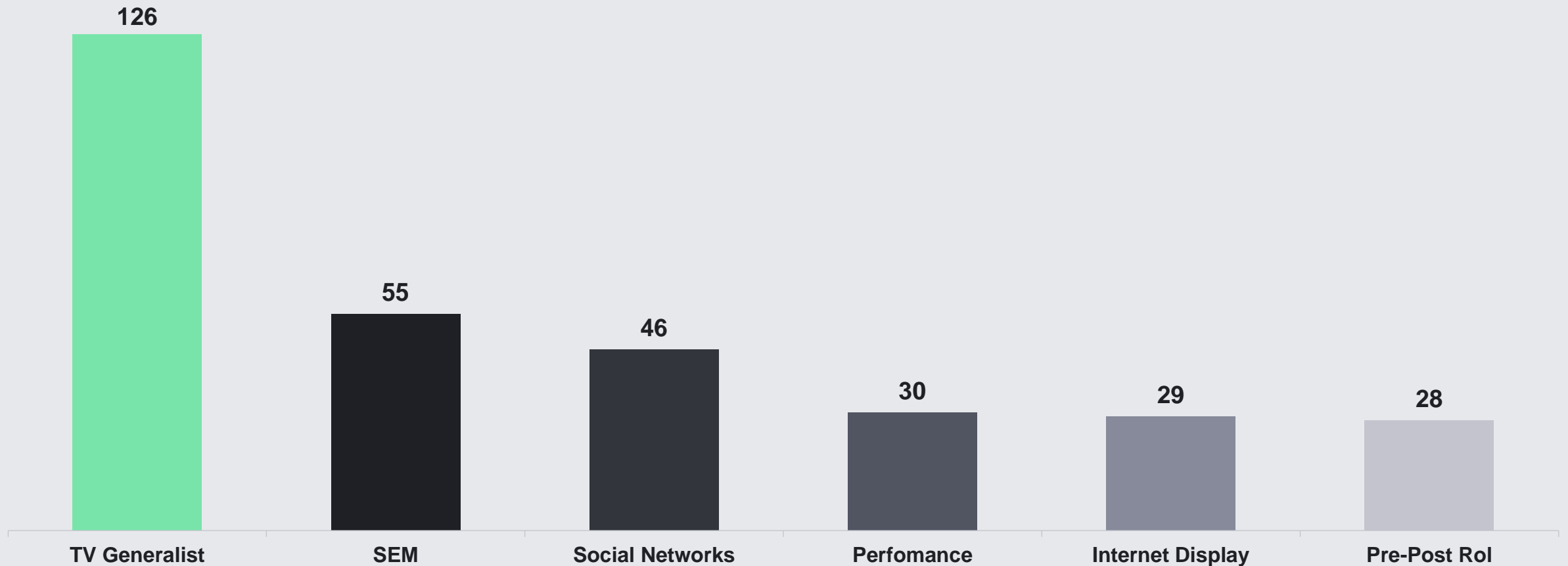
**TV is the greatest profit
generator**



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

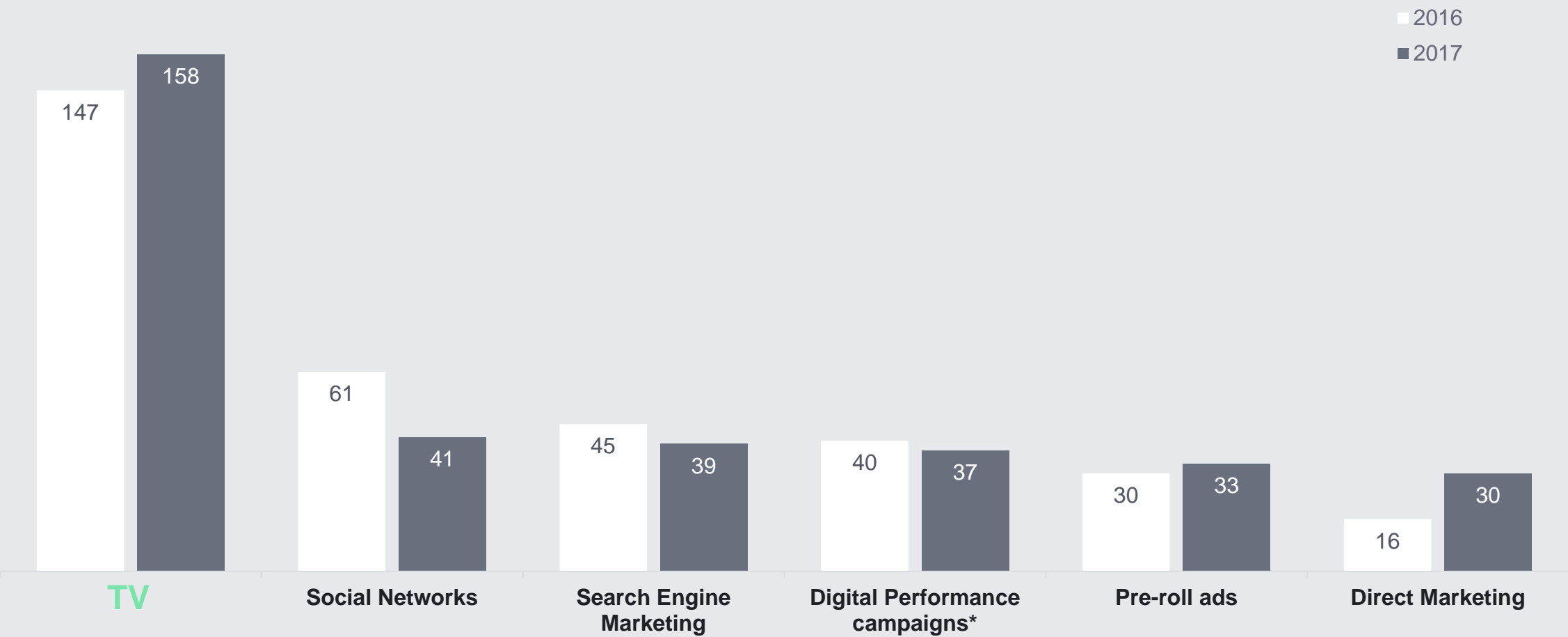


TV provides the best ROI for advertisers

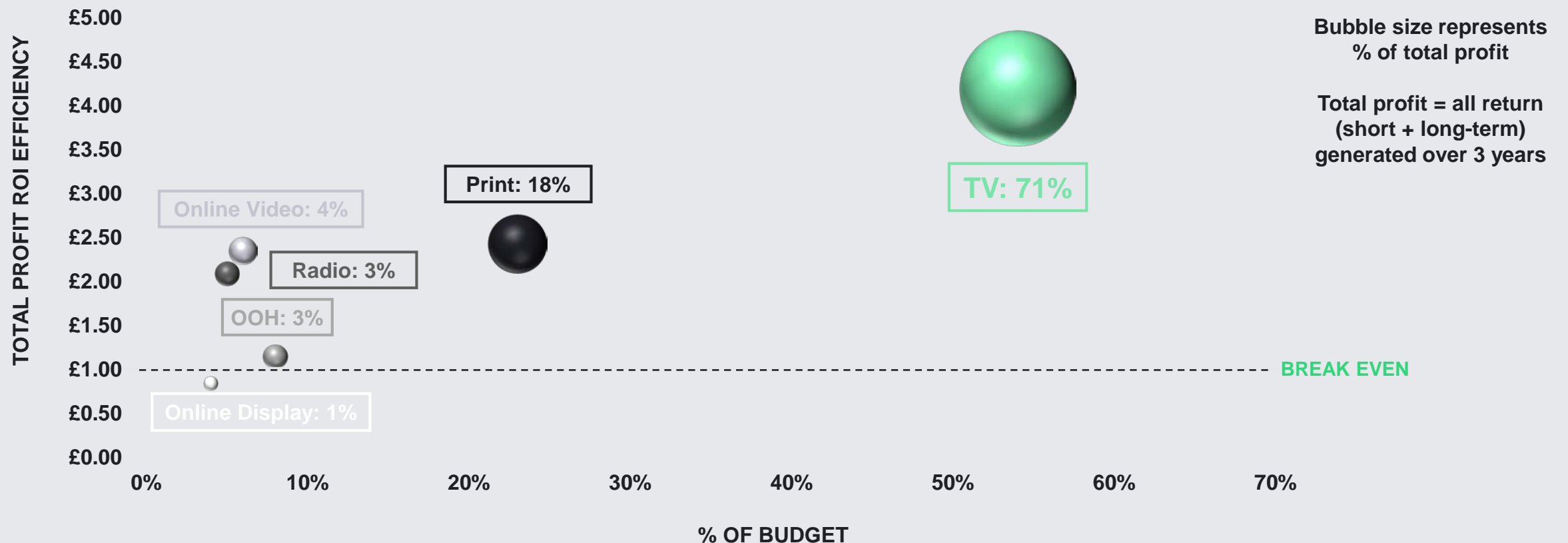


TV provides the best ROI for advertisers

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



Proportion of advertising-generated profit by medium



TV's unrivalled scalability



Online brands love TV



Online advertisers trust TV

- Despite the myth that Pure Players and online advertisers spend the majority of their advertising budget on online platforms, figures for some of the major advertisers show that they invest massively on TV.
- 7 out of the top 10 new Spanish advertisers in 2016 were online advertisers.



Source: Arce media. Net investments 2016

Advertising investment in %

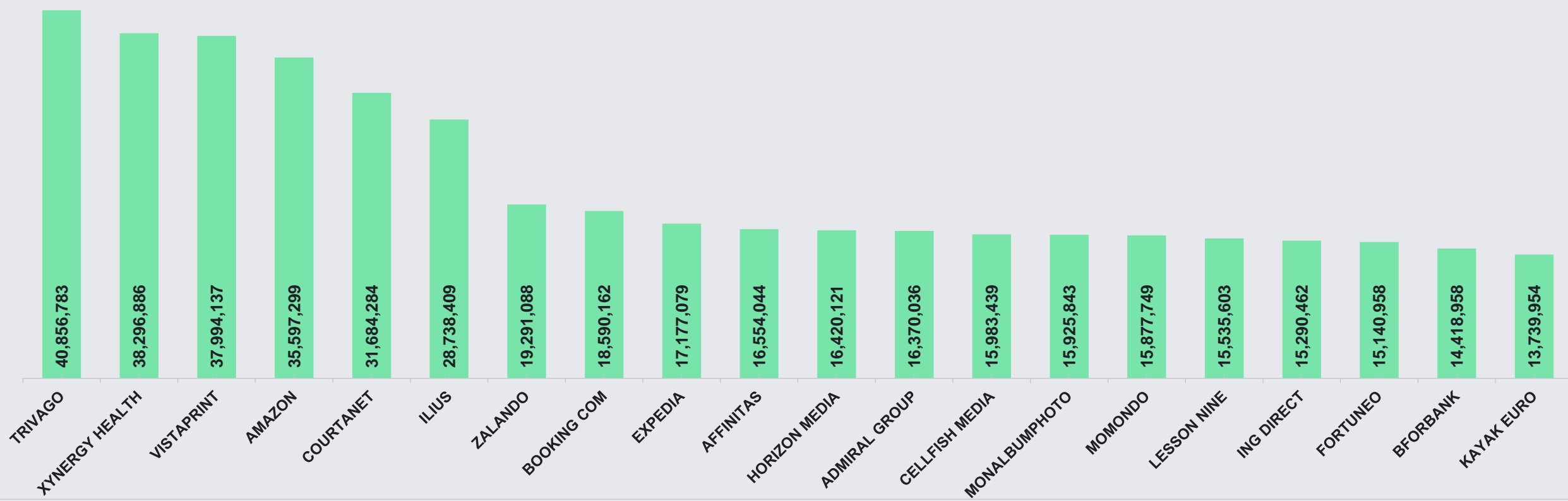
- mestic
- eDarling
- showroom
prive .com
- KAYAK
- trivago®
-  Rastreator.com
- wallapop
- zalando

TV	Online
98%	0%
96%	4%
95%	4%
93%	7%
90%	9%
87%	0%
85%	0%
80%	1%

SPAIN

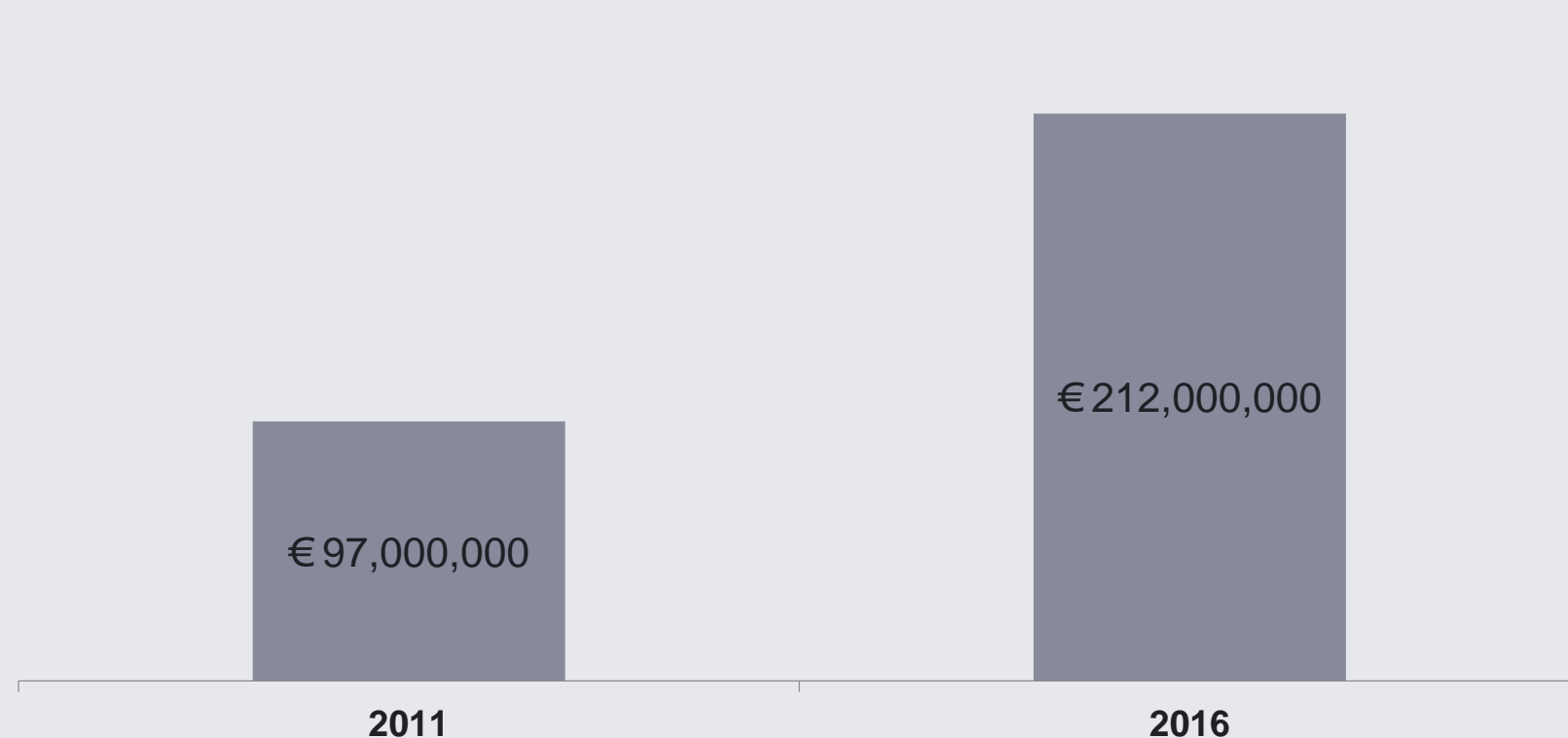
Online advertisers' TV investment has grown significantly

€ 439.5M gross is the amount invested in TV advertising by the top 20 pure player advertisers in 2016, compared to €296.7M in 2013.



Online advertisers' TV investment has grown significantly

The total TV adspend of e-commerce players doubled from €97M in 2011 to €212M in 2016.

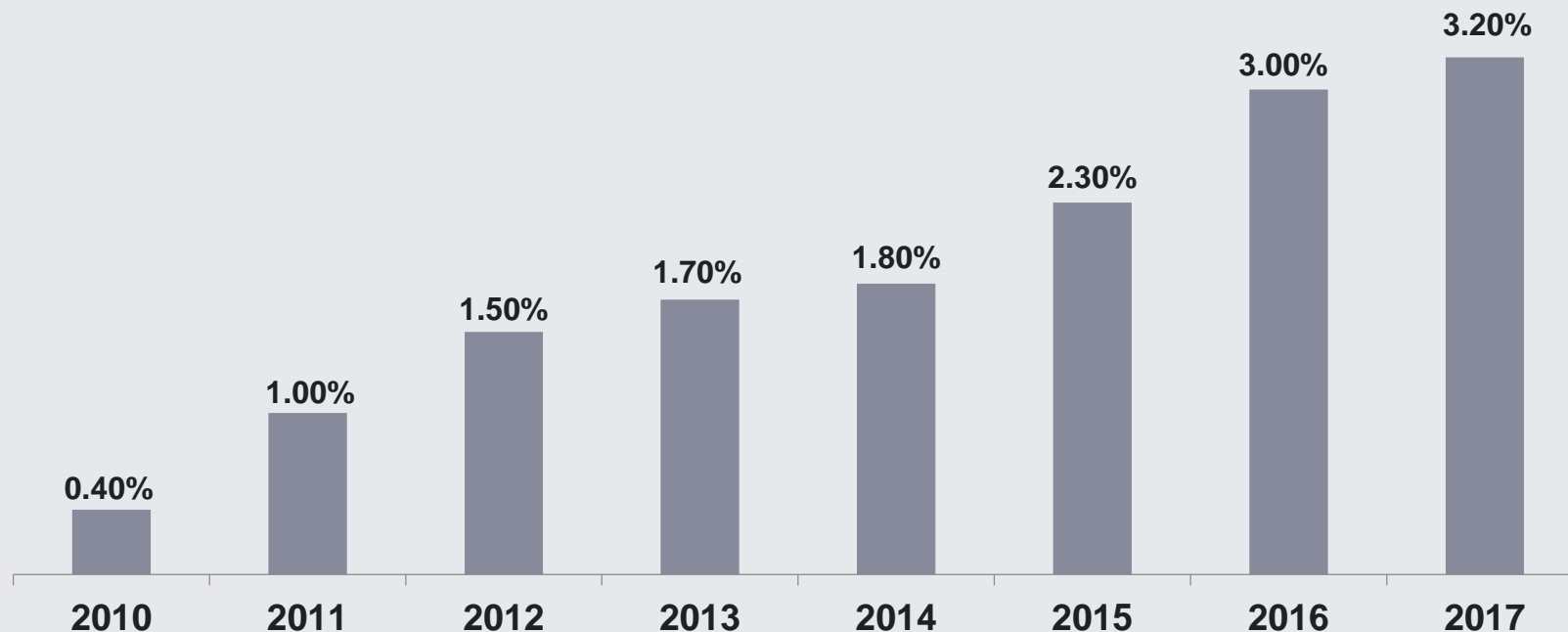


Sample of the top 25 e-commerce advertisers

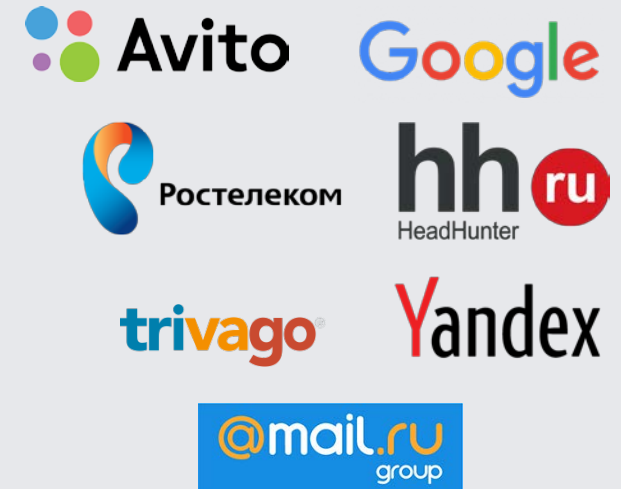


Online advertisers' TV investment has grown significantly

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



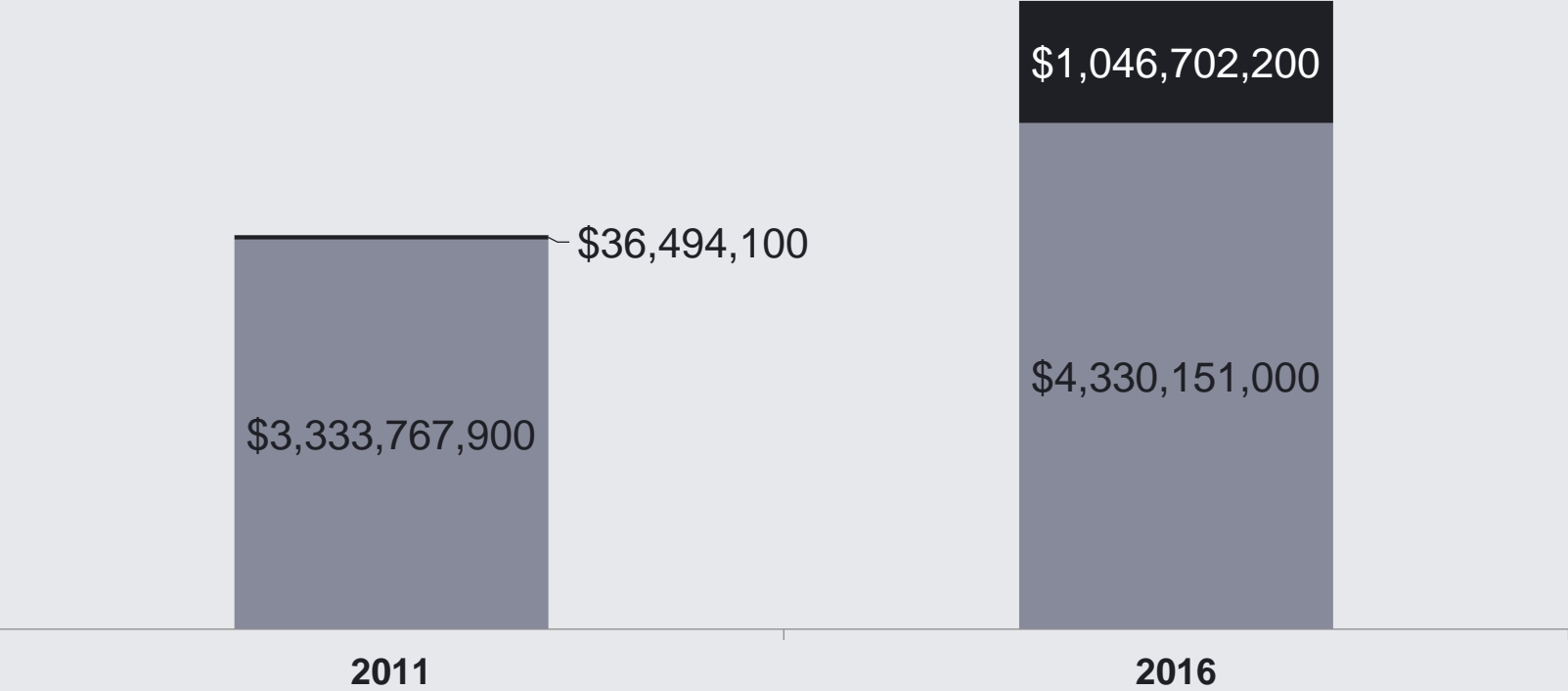
Sample of the top online advertisers



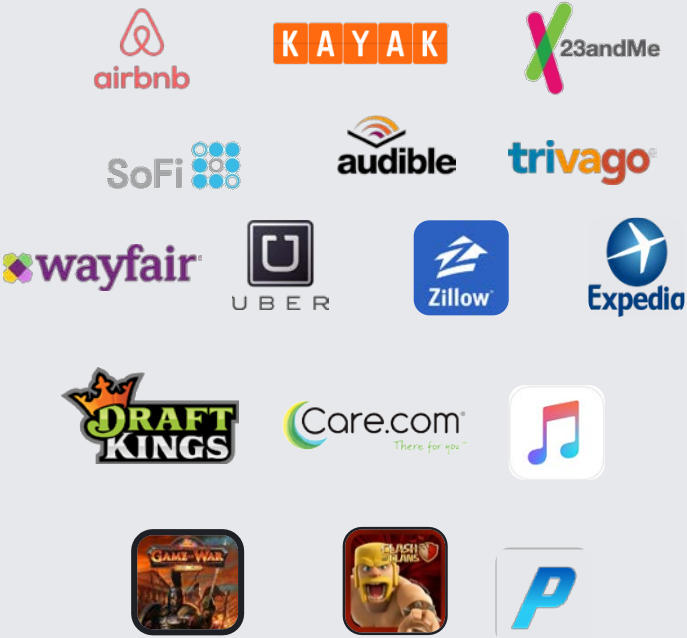
Online Brands & Mobile Apps spend billions on TV

Online brands and mobile apps are spending US\$2 billion more on TV annually than five years ago, which represents a 59% increase.

■ Online Brands'
global
investment

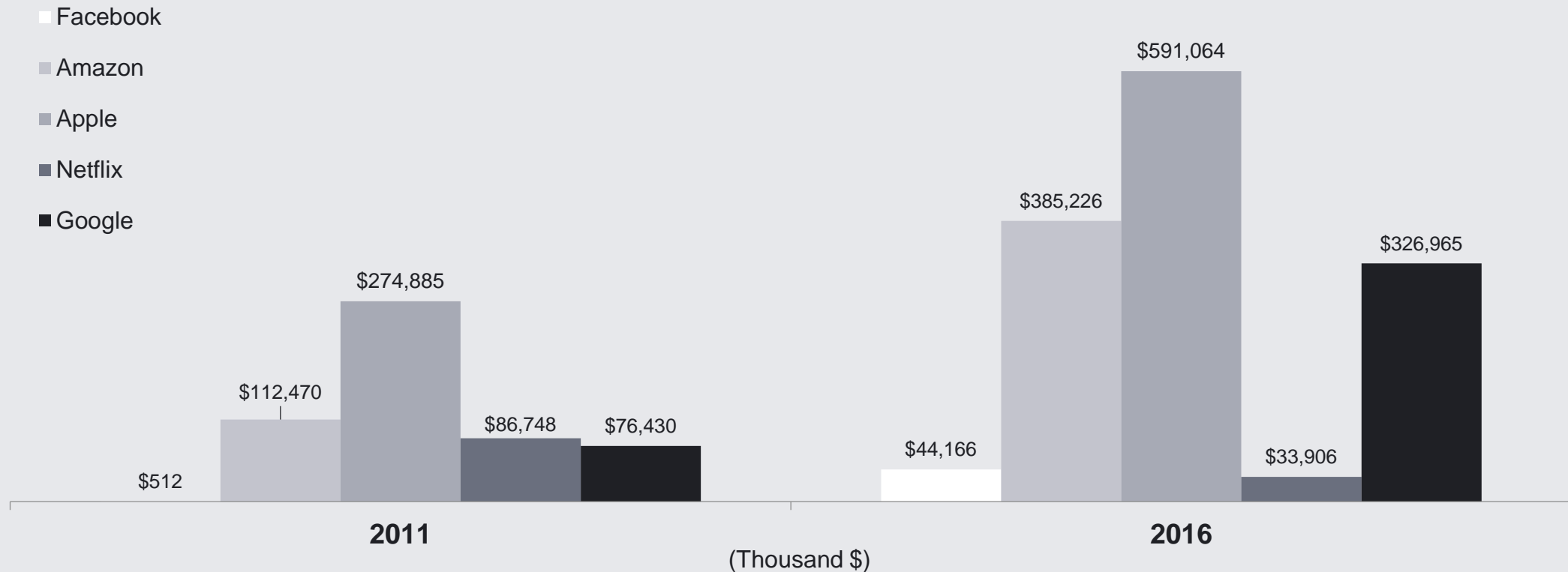


Sample of Online Brand / Mobile App TV Advertisers



The “FAANG” brands have more than doubled their TV ad spend in 5 years

The five major established digital brands have collectively increased their annual TV spend by US\$800 million over the last five years



Complementarity

TV makes all other media more effective



"Investors think that digital growth will inevitably come at the expense of the growth of TV, we disagree with this view. In fact, we think that **TV ad growth can accelerate** from a 2% per annum we have seen over the last three years to 5-7% between now and 2030"

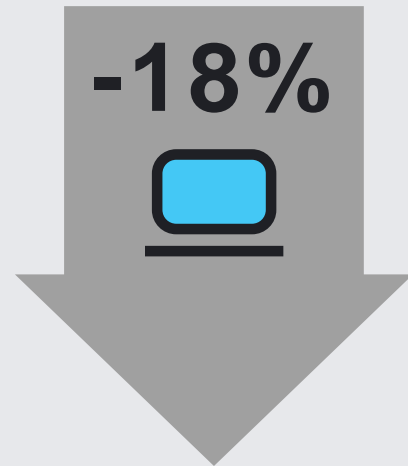
Omar Sheikh, US Media / Cable Analyst of Credit Suisse

May 2017

Multiplatform TV's halo impacts Digital ROI

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

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

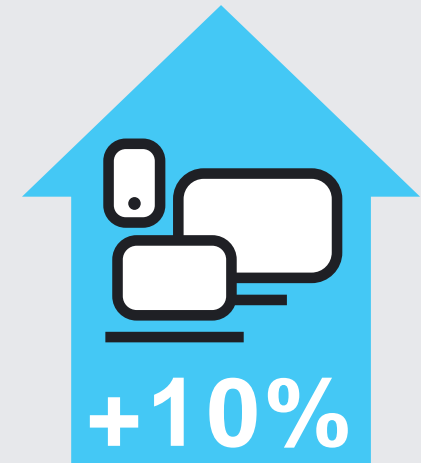


Standalone Digital ROI

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

Multiplatform TV's Halo On Digital Advertising

Impact of Multiplatform TV advertising on Digital within integrated advertising campaigns



Multiplatform TV's Adjusted ROI

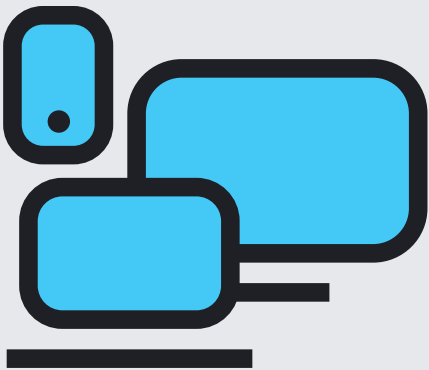
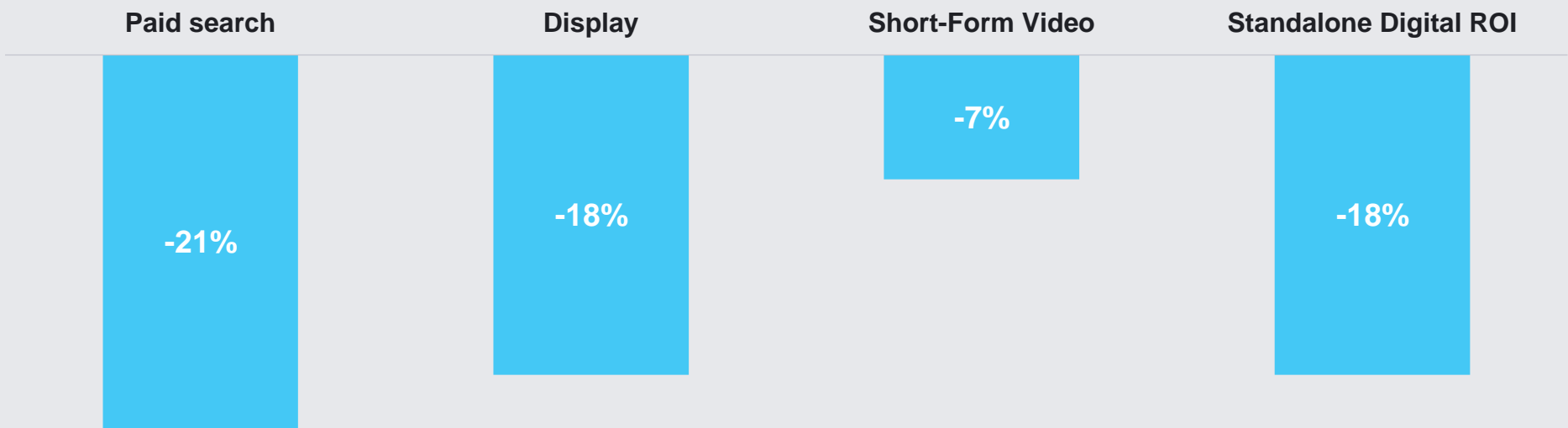
Due to Multiplatform TV's halo, Multiplatform TV's average ROI is understated

Multiplatform TV's halo impacts Digital ROI

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

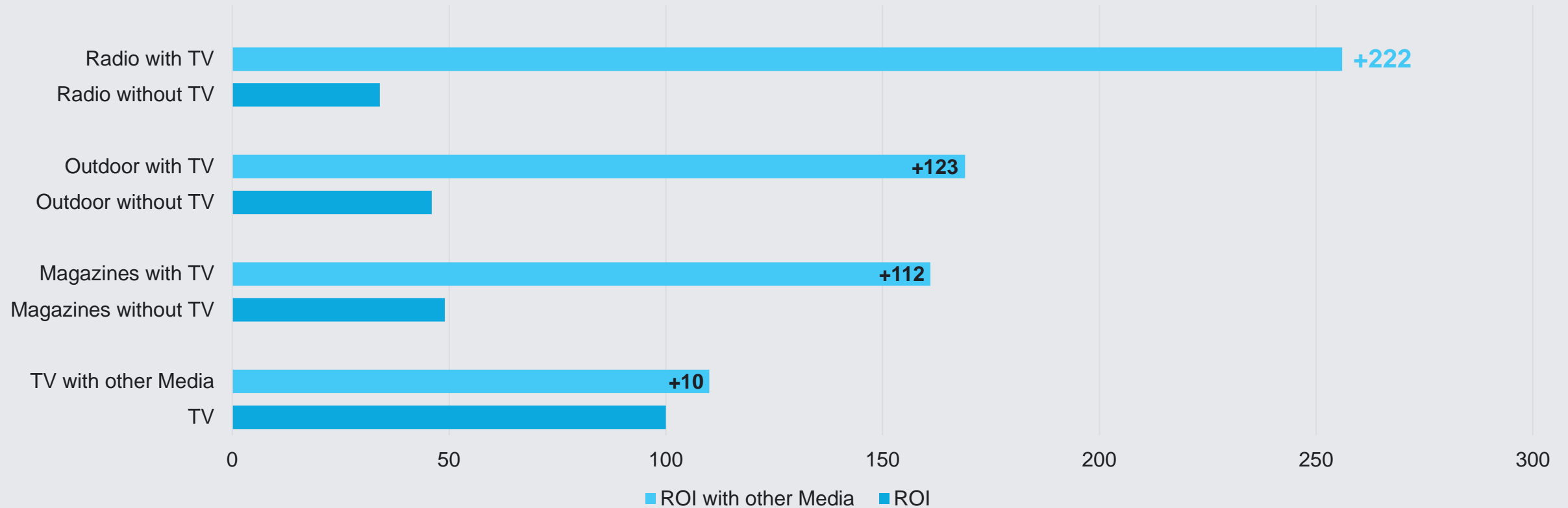
Note: Standalone Digital includes Paid Search, Display, and Short-Form Video advertising

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



TV boosts other media

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



Ready for what's next

TV keeps reinventing itself

It is future-proof





Connect TV / Addressable TV



VOD / MCN / MPN exposure



Targeting & Data



Drive to shoppers & customers



Content / Influencer marketing



**Creative /immersion experience
(AR / VR)**



**Ad tech
(Total Video Market Place)**

TV has it all

The Global TV Group