



Tomorrow's TV created today

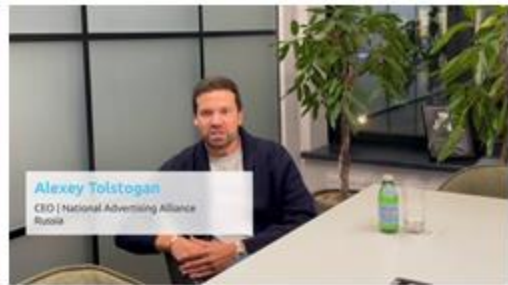
Media industry leaders champion the power of today's TV

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With the support of **The Global TV Group**



Marinella Soldi
President | Rai
Italy



Alexey Tolstogan
CEO | National Advertising Alliance
Russia



Stefano Sala
CEO | Publitalia '90 - Gruppo Mediaset
Italy



Kim Pöder
EVP & Chief Commercial Officer | NDR1
Nordics



Jean-Paul Philippot
CEO | RTBF
Belgium



Gilles Pélissier
Chairman & CEO | TF1 Group
France



James Warburton
Chief Revenue Officer | Seven West Media
Australia



Cesten Almqvist
CEO | TV4
Sweden



Wolfgang Link
CEO | ProSiebenSat.1 Entertainment Group
Germany



Silvio González Moreno
CEO | Atresmedia
Spain



Marek Singer
CEO | Prima TV
Czech Republic



Khatik Sherrif
CEO | e-tv Group
South Africa

**TOMORROW'S TV,
CREATED TODAY**
by TV industry leaders from across the globe



Mark Frain
CEO | Foxtel Media
Australia



Gian Paolo Tagliavia
CEO | Rai Pubblica
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Chief Revenue Officer | Channel 4
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Matthias Dang
Co-CEO | RTL Deutschland
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Carolyn McCall
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Stewart Johnson
SVP of Sales and Sports | Bell Media
Canada



Noel Curran
Director-General | EBU
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Fabrice Mollier
President | Canal+ Brand Solutions
France



Gabriella Vidus
CEO | RTL Hungary / r-tv
Hungary



Gerhard Zeiler
President | WarnerMedia International
US



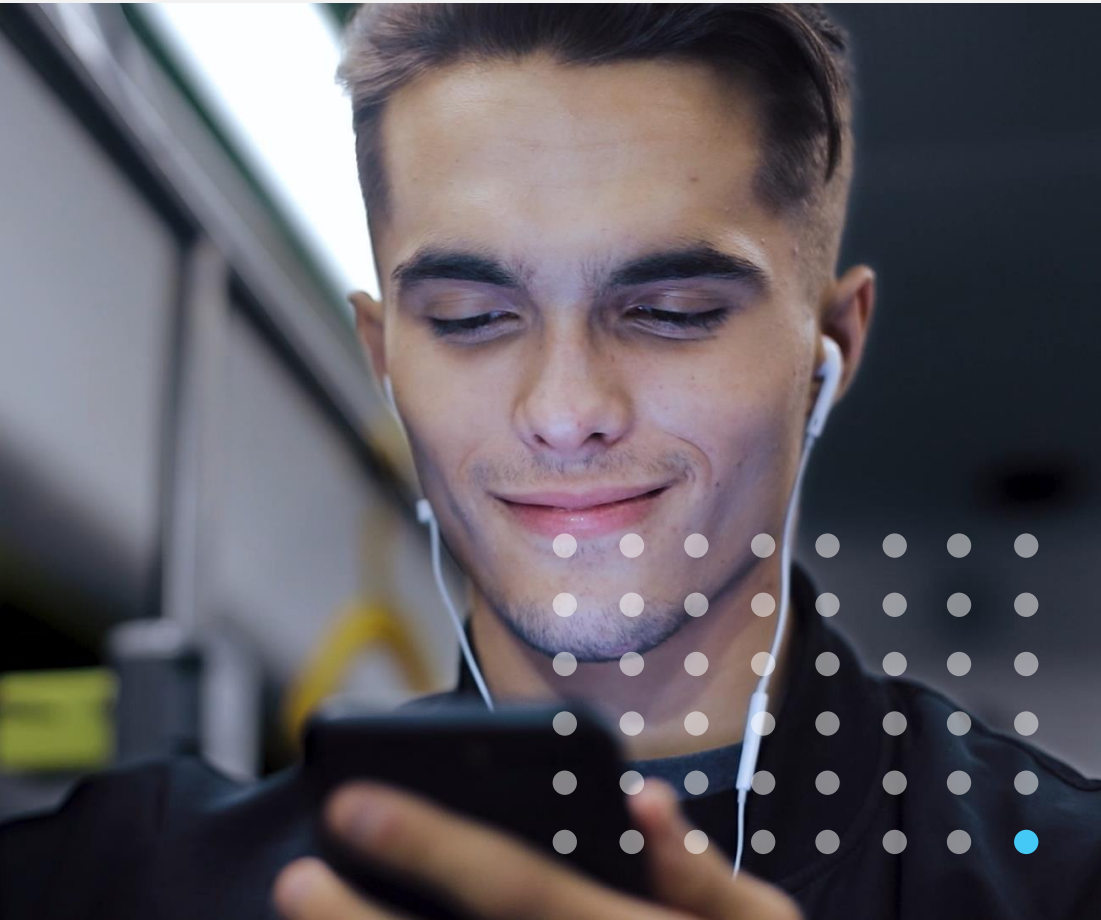


Viewers watch TV anytime, anywhere and on any device

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TV isn't dying - It is transforming and adapting to changes in how, where and when people watch video content



TV is all about giving viewers what they want, when they want it and in whatever format pleases them most. **Anytime, anywhere and on any device**, or as the French say *mobilité* – a perfect fusion between mobility and ubiquity. In my opinion, TV is just getting started.



--- F.P. Balsemao, CEO, Impresa Group



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It is no secret that there has been a dramatic shift in how content is consumed, particularly in the last two years. For years, self-appointed experts have proclaimed television is dying. They are of course wrong, and in many cases biased. **TV isn't dying. It is changing. It's adapting, to changes in how, where and when people want to watch video content.**



--- James Warburton, CEO, Seven West Media



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A nation used to get the TV it deserved – but now it gets the TV it wants, at any place, at any time and on any device

In 2000 some experts foresaw the end of the tv, but simply those two letters T and V changed to signify Total Video: **choose any place, any time to watch content, on multiple and even simultaneous devices.** Data and algorithms create an increasingly 'tailored for me' TV experience.



--- Marinella Soldi, President, Rai



Rai Pubblicità



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A nation used to get the TV it deserved. But because of delivery mechanisms that has changed. **A nation now gets the TV it wants, when it wants it and how it wants it.**



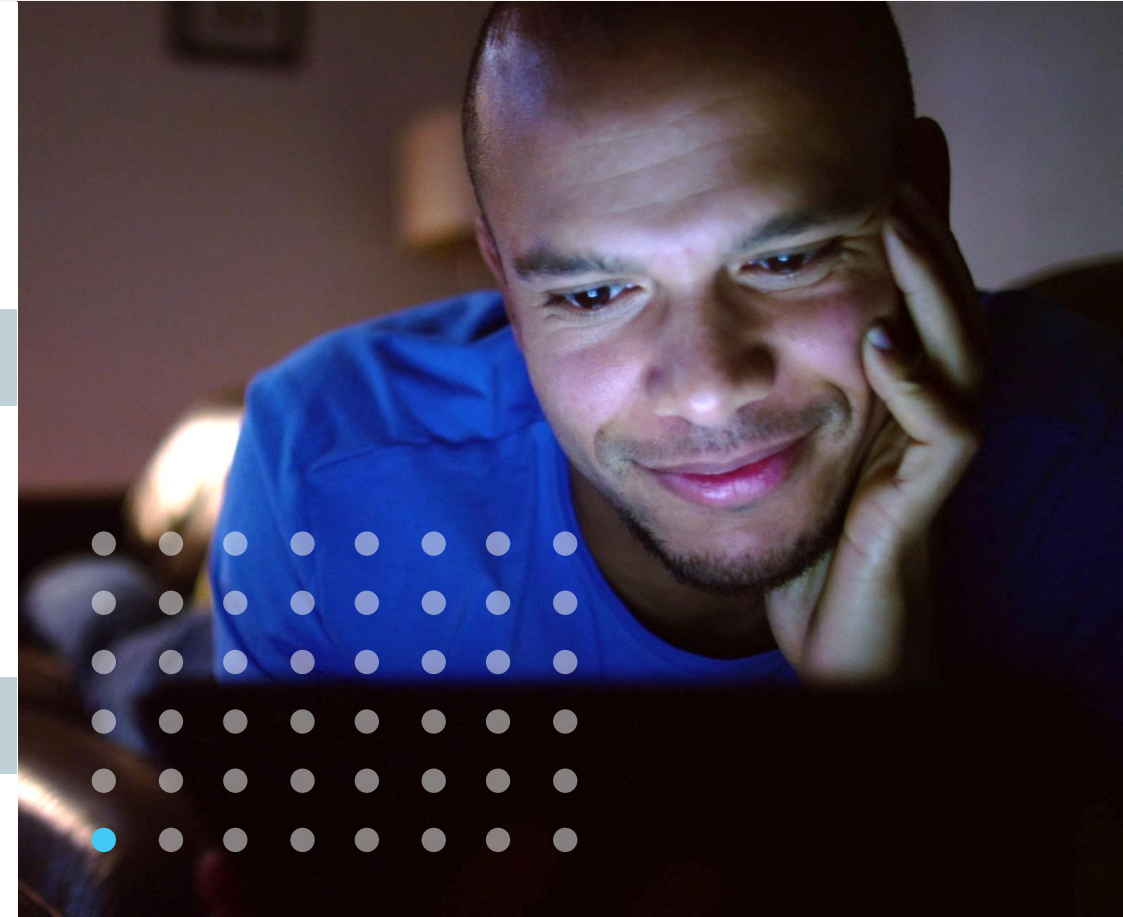
--- Khalik Sherrif, CEO, e-tv



e



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TV is a data-driven and personalised medium

With the reach of TV and digital targeting capabilities, advanced TV combines the best of both worlds

The good news is that addressable TV and advertising means that we **combine the best of both worlds**, having the reach of the television media in the traditional sense and the new capability to reach and target specific audiences like on the internet. Expanding our media to the digital world is certainly the way to go.



--- Gilles Pélisson, Chairman and CEO, TF1 Group



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Case studies

- [TF1 Pub maximises reach through addressable TV \(FR\)](#)
- [RMB's campaign reveals the power of addressable TV \(BE\)](#)
- [United Media's unique addressable platform - VIDA \(SR\)](#)
- [Sky Media's AdSmart - Five Years and Forward \(UK\)](#)

TV is shifting from a one-to-many mass medium to a one-to-one target medium

TV continues to **shift from a one-to-many mass medium to a one-to-one target medium**. In other words, by harnessing data and new technologies, TV can achieve both maximum reach and maximum personalisation.

Data has a crucial role to play here. It gives us an insight into the world of our users, helping us understand what our users want, what drives them and what excites them. Knowing their preferences, needs and behaviour allows us to offer users more attractive, customised products and content as well as tailor-made advertising.



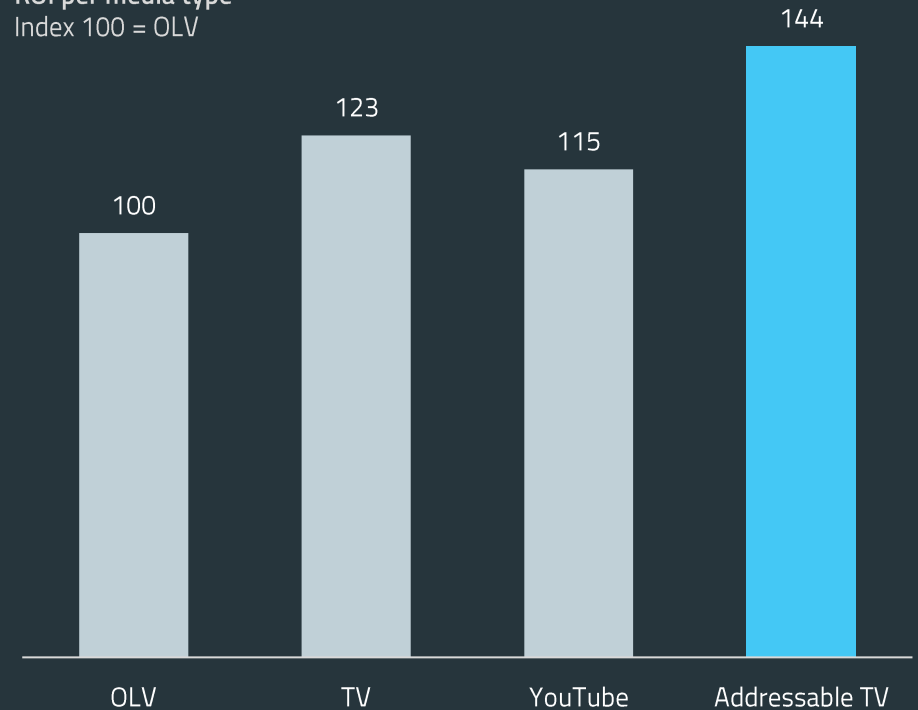
--- Matthias Dang, Co-CEO, RTL DE



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Addressable TV has the highest overall ROI compared to other AV formats

ROI per media type
Index 100 = OLV



ROI measurements

- Addressable TV has 44% higher ROI compared to Online Video (OLV) and 29% compared to YouTube
- Addressable TV has 21% higher ROI compared to TV commercial

Source: *Understanding the role & impact of media – Case studies 2021. TV2 & Dentsu*

Large budget or small, TV now offers highly granular cross-genre targeting solutions

We are nurturing the ideal conditions for effective brands' and product communication in relevant, brand safe environment. This also unlocks completely new opportunities for advertisers who are increasingly looking to address target groups based on their personal taste. **Regardless of the time and the place, even with a smaller budget, thanks to the newest technology, TV can offer highly granular cross-genre targeting solutions.** Personalised content and innovative technologies are the future. Addressable TV or CTV is no longer a niche topic.



--- Matthias Dang, Co-CEO, RTL DE



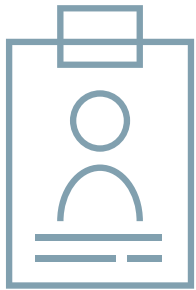
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Addressable TV offers highly granular targeting capabilities and scale to campaigns

Examples of targeting criteria for ATV campaigns

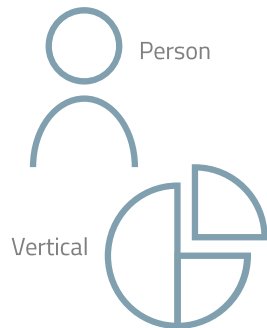
AUDIENCE TARGETING

AGF/GFK Panel
eg. age, gender



CROSS-DEVICE SPOT ON: DATA BRIDGED

Household-based
eg. fashion, automotive



GEO/WEATHER TARGETING

IP-based
eg. federal states, weather



BEHAVIORAL TARGETING

Cookie-based
eg. single, seniors, 50+, households with children



SPOT/FORMAT RETARGETING

Based on TV and digital data
Contact optimisation



TECHNICAL TARGETING

Technical attributes
eg. TV model, provider, TV signal



Source: SevenOne Media, Addressable TV, August 2021

TV drives traffic to the web

There is an increasing need for brands to use their KPIs and data to prove that their investment in TV is the best in terms of sales, website visits and so on. The good news for television is that most people are now seeing TV in the connected world, so we, as TV sales houses and TV operators, are now able to gather data, connect it to the data of the advertisers and then **prove that each ad break on each day-part on each channel has a big efficiency in sales.**



--- Fabrice Mollier, President, Canal+ Brand Solutions



CANAL+



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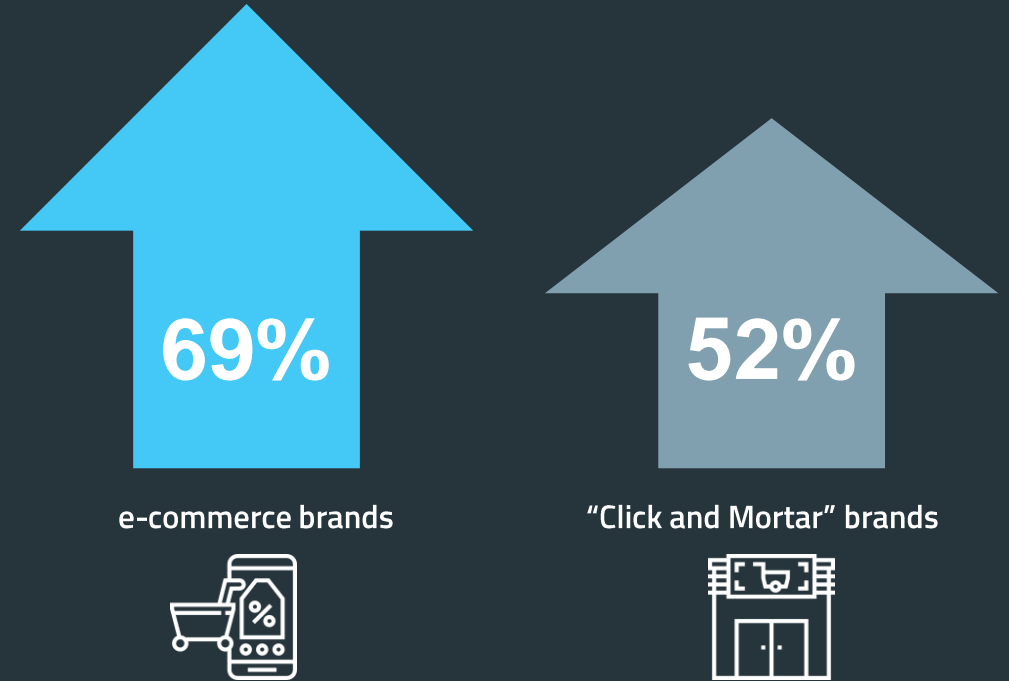


Case studies

- [Bell Media's Sam platform measures the drive-to-web effect of TV campaigns \(CA\)](#)
- [TV advertising drives e-commerce in Russia \(RU\)](#)

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



Source: [Realytics 350](#), January 2020, The keys to an efficient drive-to-web TV campaign, 350 campaigns analysed, by 120 brands in France between June 2017 and June 2019. "Click and mortar" means physical shops that also have a website or online asset.

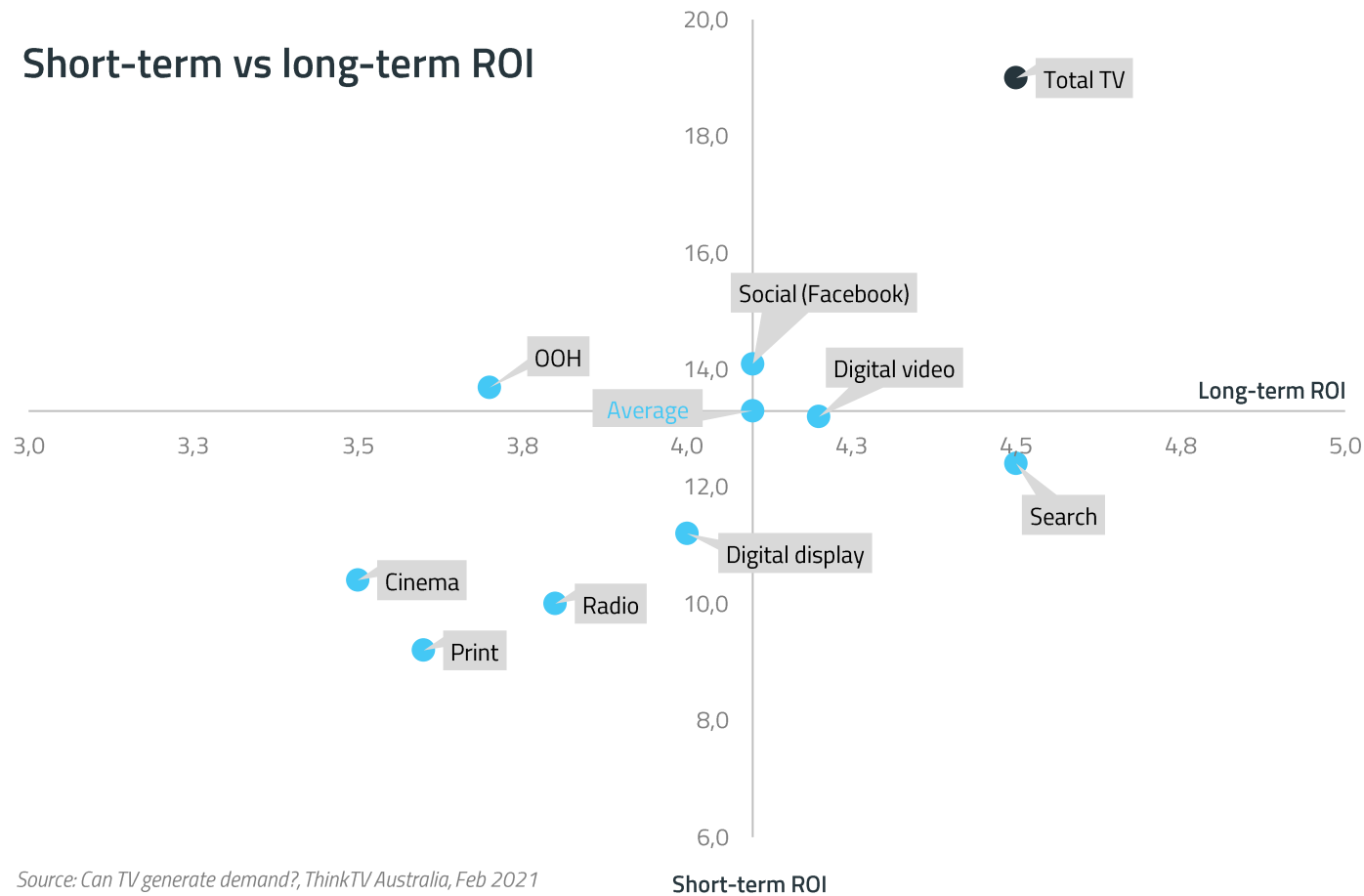
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TV works across the entire marketing funnel for all types of brands

TV consistently delivers results and recognised KPIs for brands

Short-term vs long-term ROI



Source: Can TV generate demand?, ThinkTV Australia, Feb 2021



TV is the medium working across the entire marketing funnel, ranging from branding to performance, **delivering not only results but also clear and recognised KPIs.**



--- Stefano Sala, CEO,
Publitalia '80 / Gruppo Mediaset, Italy



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TV has tremendous halo effect on other media by working its way right down the funnel

While the top of the funnel remains critically important, TV also offers the opportunity to work its way right down the funnel.

We know TV has tremendous halo effect on other media and its impact lasts far longer than other advertising. Currently there isn't anything that works better throughout the buying-funnel than TV.



--- Stewart Johnson, SVP of sales and sports, Bell Media Sales



Bell Media



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Standalone Digital ROI

-19%



TV's adjusted ROI

+23%



Without TV's halo effect, digital advertising's average ROI would decline by 19%

Source: [Canadian Media Attribution Study](#)

Data-driven, outcomes-obsessed 'direct-to-consumer' brands are some of the biggest TV spenders globally

...Nowadays, the client list is a lot more fragmented, with advertisers across all life stages, including both DTC and non-DTC brands, who **experience significant business outcomes as a result of scale, legitimacy, halo effect that TV and video advertising delivers.**

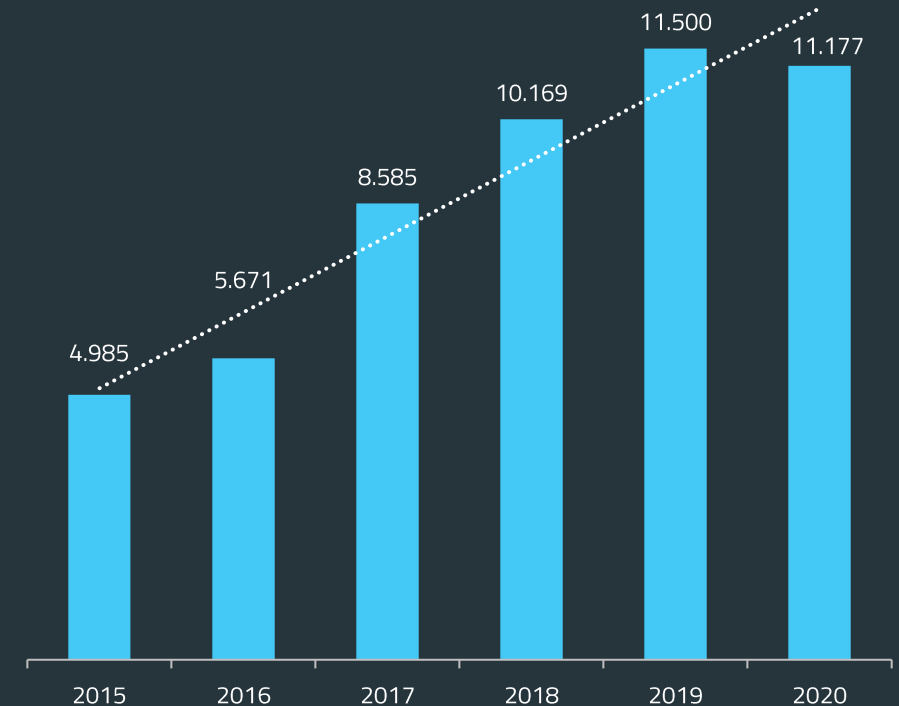


--- Kim Poder, EVP & Chief Commercial Officer, NENT, Nordics



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Direct-to-Consumer Brands Total TV Spend in
2015 - 2020
(in EUR Millions)



Source: The Global TV Group – *The Global TV Deck: Direct-to-consumer brands' and global tech firms' investments in TV advertising, 2021.*

Start-ups and new-to-TV brands are benefitting hugely from TV advertising

The disruptors, the scale-ups, the start-ups. We have seen more of those than ever before coming to test TV, whether that being through linear or indeed video-on-demand and they are seeing fantastic growth and returns for those early investments.

What we have always known, that TV is a hugely effective medium at building fame and business results for those big, national brands. I **think it's so encouraging to see that so many new-to-TV brands are coming now and seeing real growth, real scale and real opportunity.**

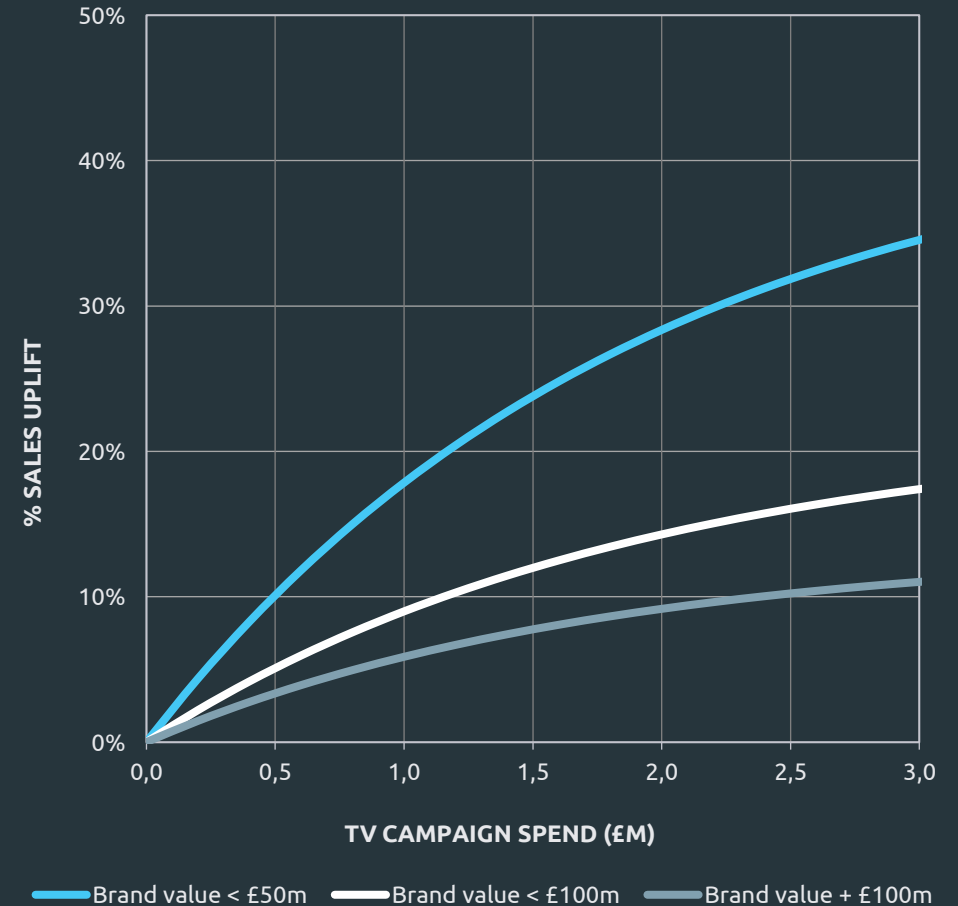


--- Verica Djurdjevic, Chief Revenue Officer, Channel 4

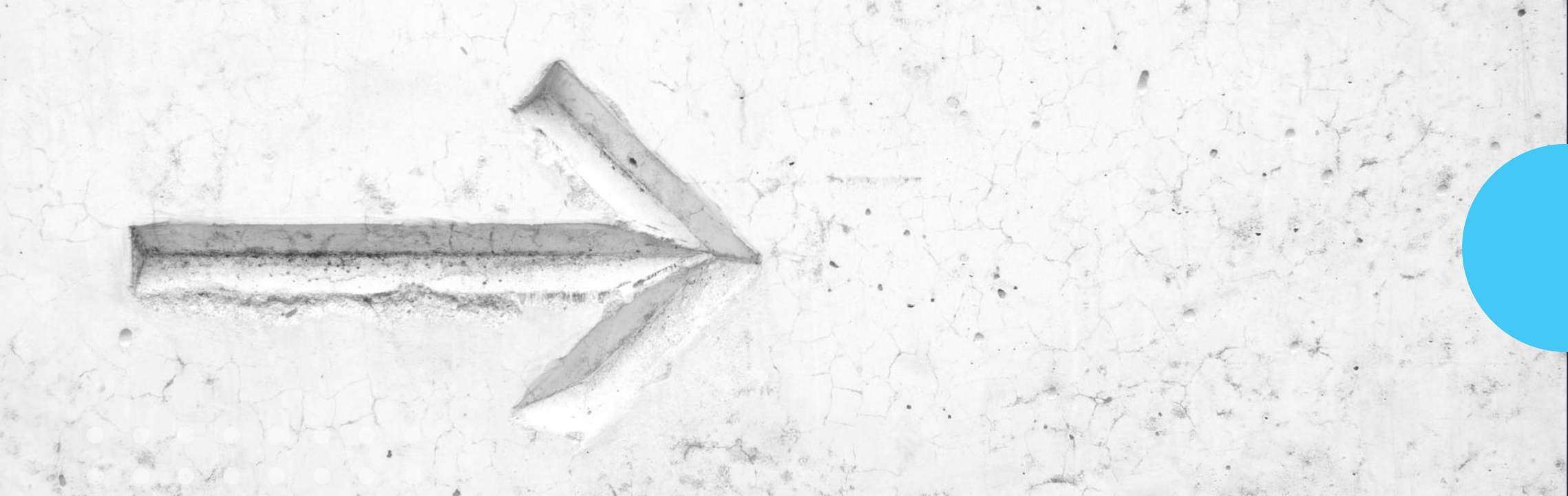


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Smaller brands see the biggest uplifts in sales



Source: [As seen on TV](#), Thinkbox/Data2Decisions, 2019



TV is a most trusted medium
that drives positive change

People's trust in TV is far higher than in online media and social networks

We have seen the hugely positive impact that television output has in terms of culture, information, entertainment, diversity and education across the board. **And that is precious.** That is particularly precious now and I don't see that changing.



--- Noel Curran, Director General, EBU



EBU

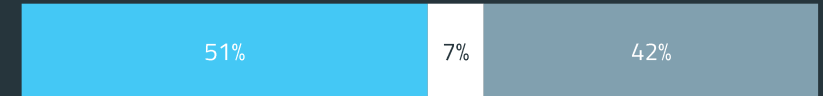
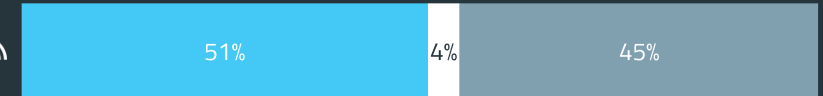


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Trust in Media in the EU (% of population, 2021)



■ Tend to trust ■ Don't know ■ Tend not to trust

*Note: Survey results at EU level represent a weighted average across the 27 EU Member States, applying official population figures provided by EUROSTAT.
Source: EBU based on Standard Eurobarometer94. EBU Media Intelligence Service – Trust in Media 2021.*

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TV has an important role to play in an ever more polarised world, to differentiate between facts and opinions, views and news

We are in the trust business. We have an important role to play in times of **confusion**, between what's a fact and what's an opinion, what's news and what's views and what is activism and what is journalism.



--- Casten Almqvist, CEO, TV4



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In a society which is every year more and more polarised, TV brings people together, includes everyone. In a world of **anonymity**, we bring awareness and trust. That's core values to make TV a key factor for diverse and vibrant democracy.



--- Jean-Paul Philippot, CEO, RTBF



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TV's measurability and accountability at scale make it the most trusted medium

100% brand-safe, audio-visual premium content, watch by millions of real viewers at the very same time on full screen and measured by independent research companies according to international standards which provides us with the strongest currency on the ad market, maybe the only currency of it. No fraud, no excuses, no scandals, just powerful reach and emotional impact. In a single word: Television.



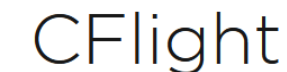
--- Gabriella Vidus, CEO, r-time / RTL Hungary



r-time
radio sports



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When it comes to accountability, TV is a clear leader in the video world

TV has never feared full transparency and accountability when it comes to its audience performance. And this approach has been recognised by the market and by advertisers, to the point that it's clear to everyone, everywhere in the world, that TV is the medium with the highest ROI in short and the long-term, both on sales and on profits.



--- Stefano Sala, CEO, Publitalia '80, Mediaset



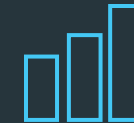
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TV's guarantees



High completion rates



Robust measurement



Full screen



Brand-safe and pre-cleared ads



Sound on



Shared viewing



Viewed by humans



Broadcasters spent billions on high quality TV programming



TV is the home of
premium content where brands thrive

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TV brings local stories and news to the mass audience

There has never been a time where more programmes have been produced than today, and more video has been consumed than today. TV today is much more global and much more diverse. **Local production, local stories find mass audience far away from home** because people want to watch and want to have access to the distinctive relevant storylines regardless of where they have been created.



--- Gerhard Zeiler, President, WarnerMedia International



WarnerMedia



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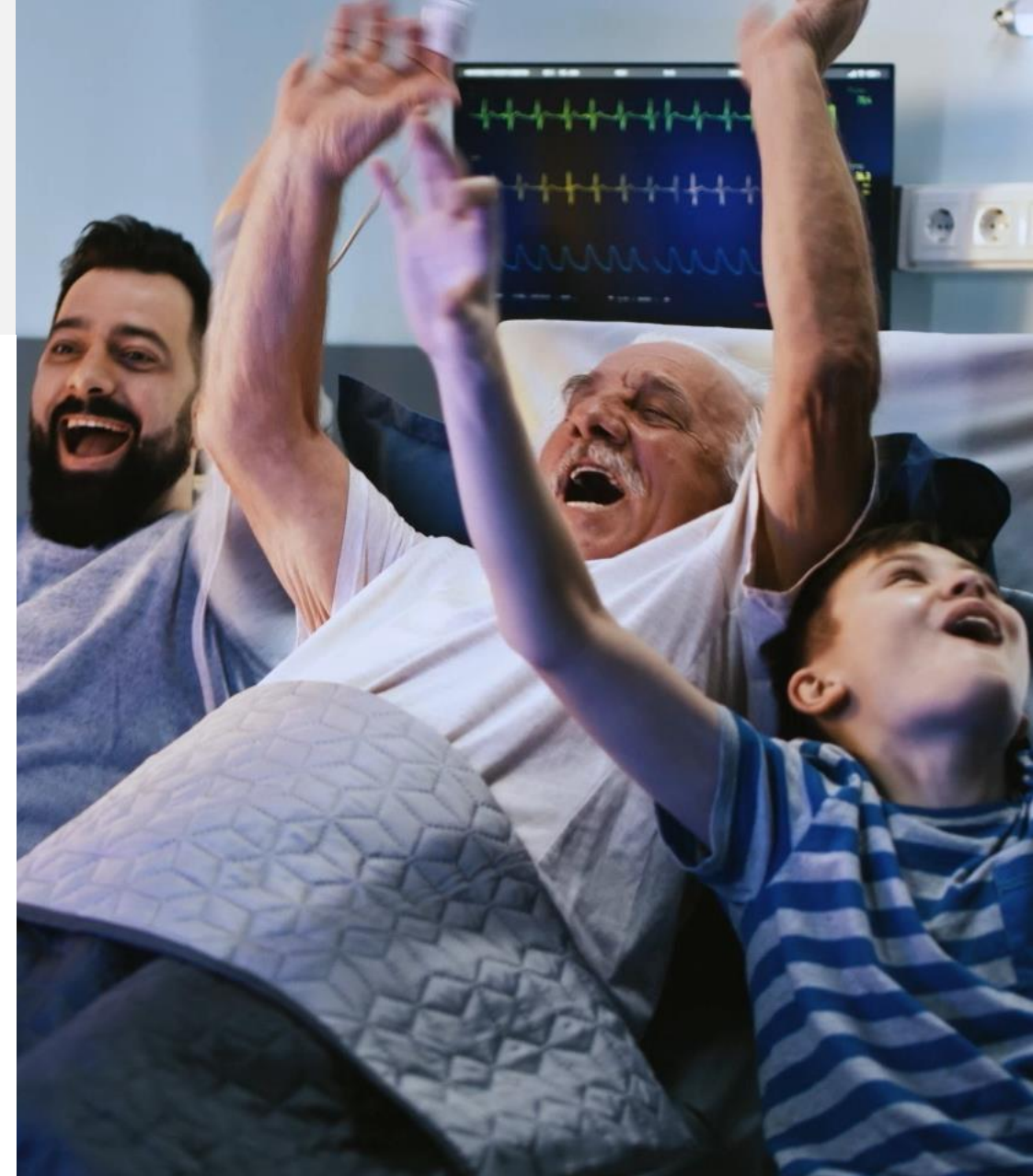


In good times and bad, TV brings people together

We united the nation around powerful, positive and uplifting moments in the nation's cultural calendar. And as we emerge from the pandemic, TV's ability to bring the nation together is still just as evident: as we have seen with an exceptional summer of sport.

TV gives advertisers a trusted, safe, premium quality, positive and uplifting home for their brands. And nothing else comes close.

--- Carolyn McCall, CEO, ITV



The on-demand TV experience is in the hands of the consumers

I believe this fight between linear TV and global SVOD platforms is just a foreplay. It will accelerate a creation of a new hybrid total-video models. Technologies will enable much more customisable models, allowing every end-consumer to choose the right proposition according to his content needs and spending limits.



--- Marek Singer, CEO, Prima TV



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Linear TV has long been the battle ground for which our audiences are and which we deliver for clients. **And now we are entering into this rapidly advancing streaming, digital world.** That is certainly what we are looking at as a business moving forward.



--- Mark Frain, CEO, Foxtel Media



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TV is a 360° factory of premium content, enabling connection between viewers and brands

YOUR TV
Discover it all.

Just a few years ago, when we talked about TV, we were talking about a device placed in the living room of different homes. **Nowadays, tv is a 360-degree factory of premium content**, that enables the connection between viewers and brands.



--- Silvio Gonzalez Moreno, CEO, AtresMedia



ATRESMEDIA
PUBLICIDAD



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TV's ability to interact with the public benefits viewers and brands

This ability to interact and to shape the general public is really the magic of broadcast television. This is something that is very, very important, not only for broadcasters or for content creators but for companies and brands that need a safe space to articulate their storytelling and tell the general public what their core values are, what they stand for and what they are doing to fulfil their promise.



--- Gian Paolo Tagliavia, CEO, Rai Pubblicità



Rai Pubblicità



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The global pandemic has shown how important trustworthy media brands are for our viewers and how strongly the medium of television connects people across all age groups and provides security. In Germany alone we reach an average of 60 million people a month with our stations. **We aim to use this reach to benefit society.** With this reach we clearly oppose racism, hate, discrimination and fake news. With this reach TV makes people think, laugh, cry, discuss and relax.



--- Wolfgang Link, CEO, ProSiebenSat1



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