

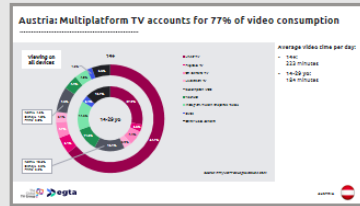


The Global TV Deck

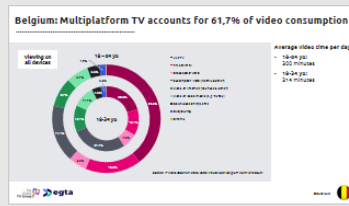
Total TV's consumption across the world

The Global TV Deck 2024

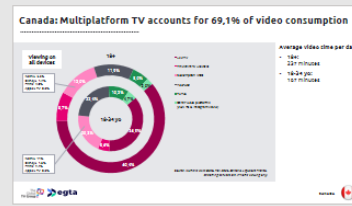
1. Austria
2. Belgium
3. Canada
4. Denmark
5. France
6. Germany
7. Italy
8. Japan
9. Netherlands
10. Norway
11. Poland
12. Spain
13. Sweden
14. Switzerland
15. United Kingdom
16. United States



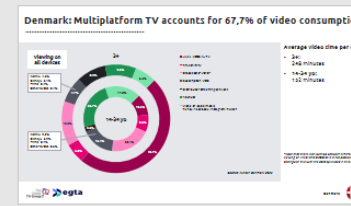
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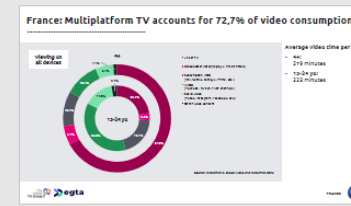
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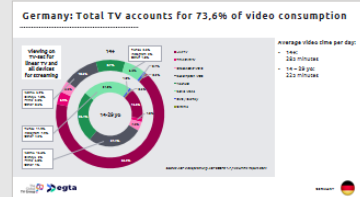
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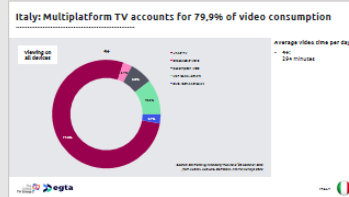
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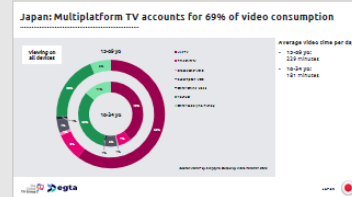
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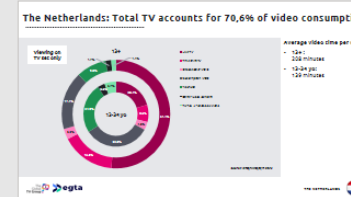
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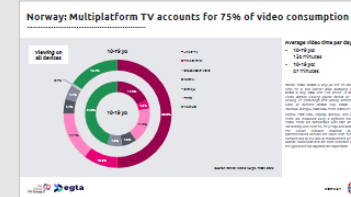
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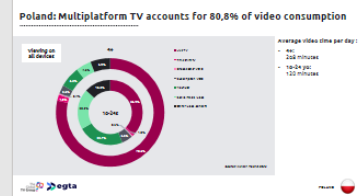
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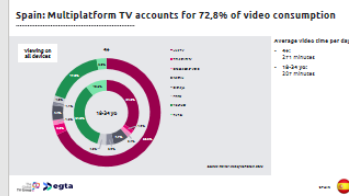
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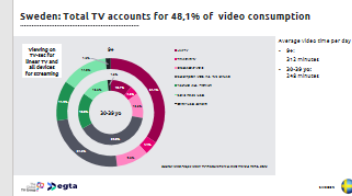
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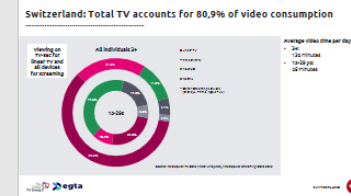
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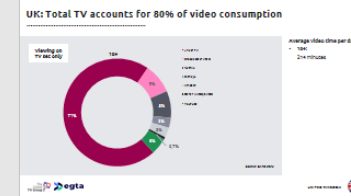
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13



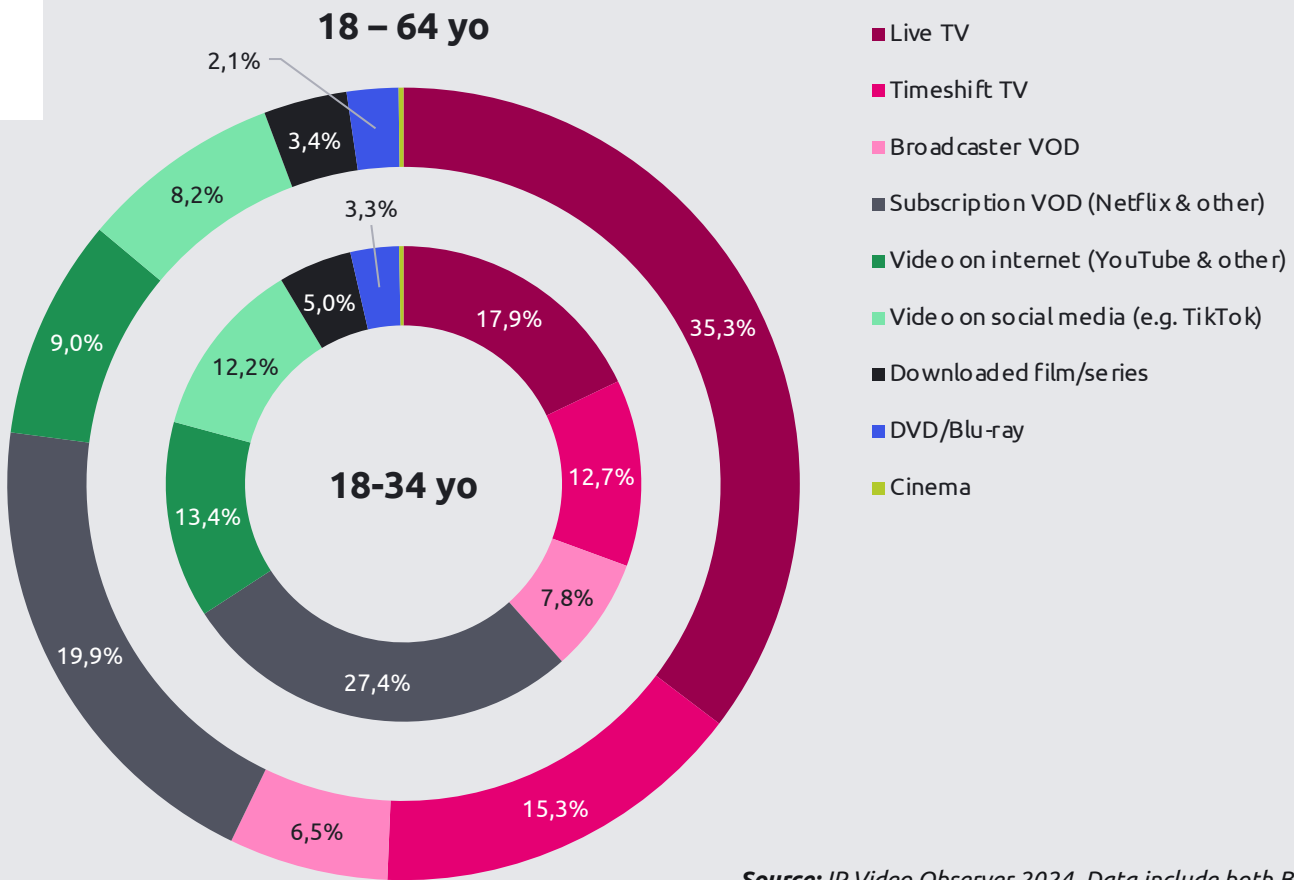
14



15

Belgium: Multiplatform TV accounts for 57% of video consumption

Viewing on all devices



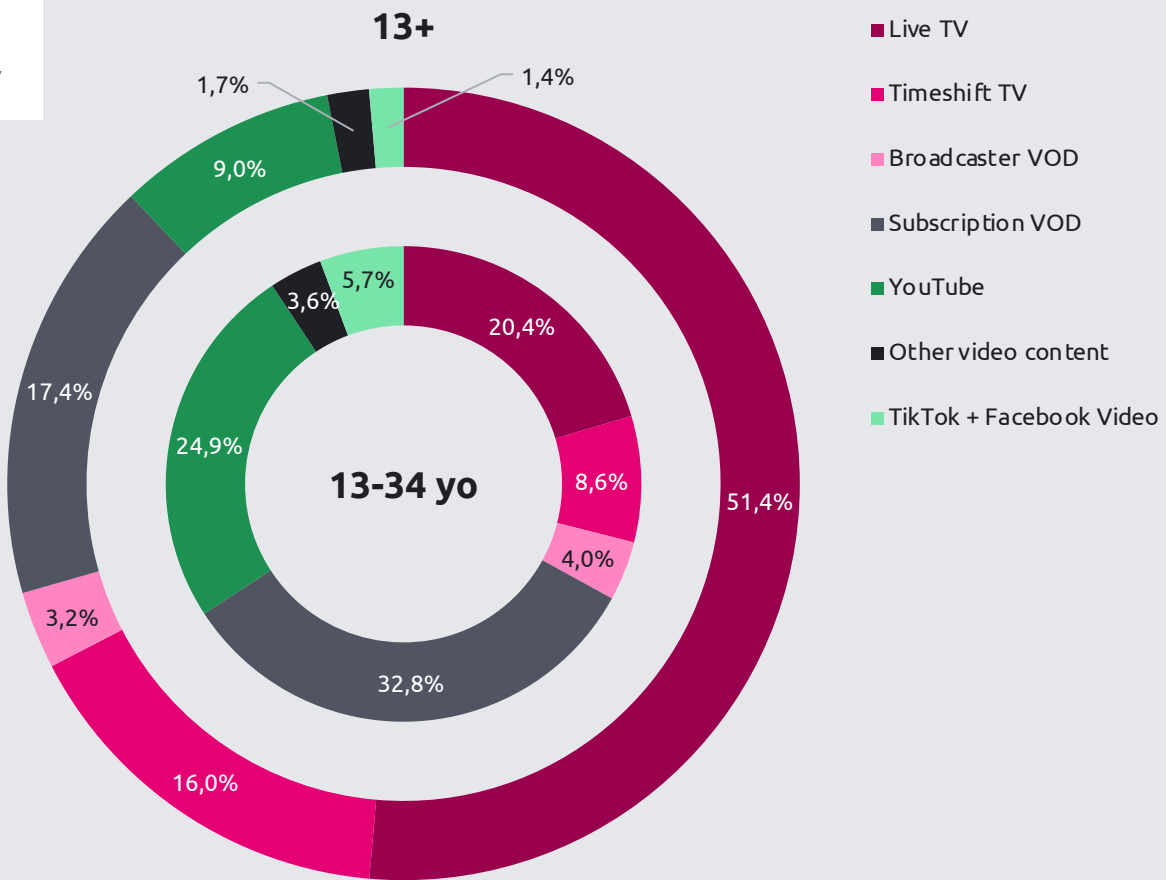
Average video time per day:

- 18-64 yo: 300 minutes
- 18-34 yo: 318 minutes

Source: IP Video Observer 2024. Data include both Belgium North and South

The Netherlands: Total TV accounts for 70,6% of video consumption

Viewing on TV set only



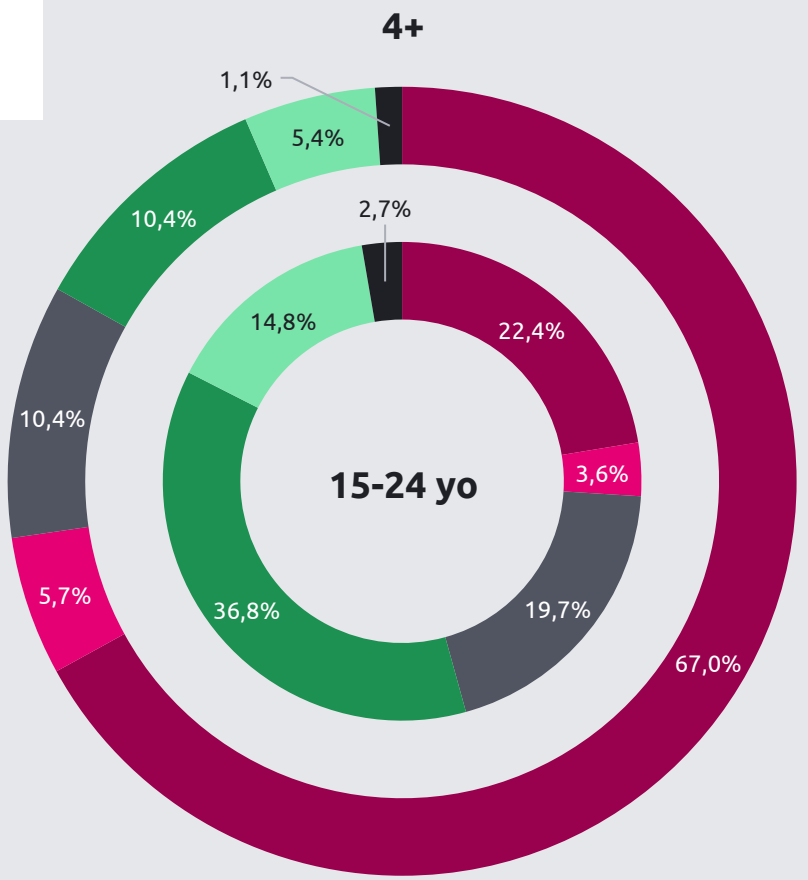
Average video time per day:

- **13+ :**
208 minutes
- **13-34 yo:**
139 minutes

Source: SKO/NMO/GfK 2023

France: Multiplatform TV accounts for 72,7% of video consumption

Viewing on all devices



- Linear TV
- Broadcaster VOD (Replay + Time-shifted)
- Subscription VOD (incl. Netflix, Disney+, Prime, etc.)
- AVOD (YouTube, Twitch, FAST channels)
- Social video (Tiktok, Instagram, Facebook, etc.)
- Other video content

Average video time per day :

- **4+:**
279 minutes
- **15-24 yo:**
223 minutes

Source: Médiamétrie; Global vidéo and Médiamat 2023

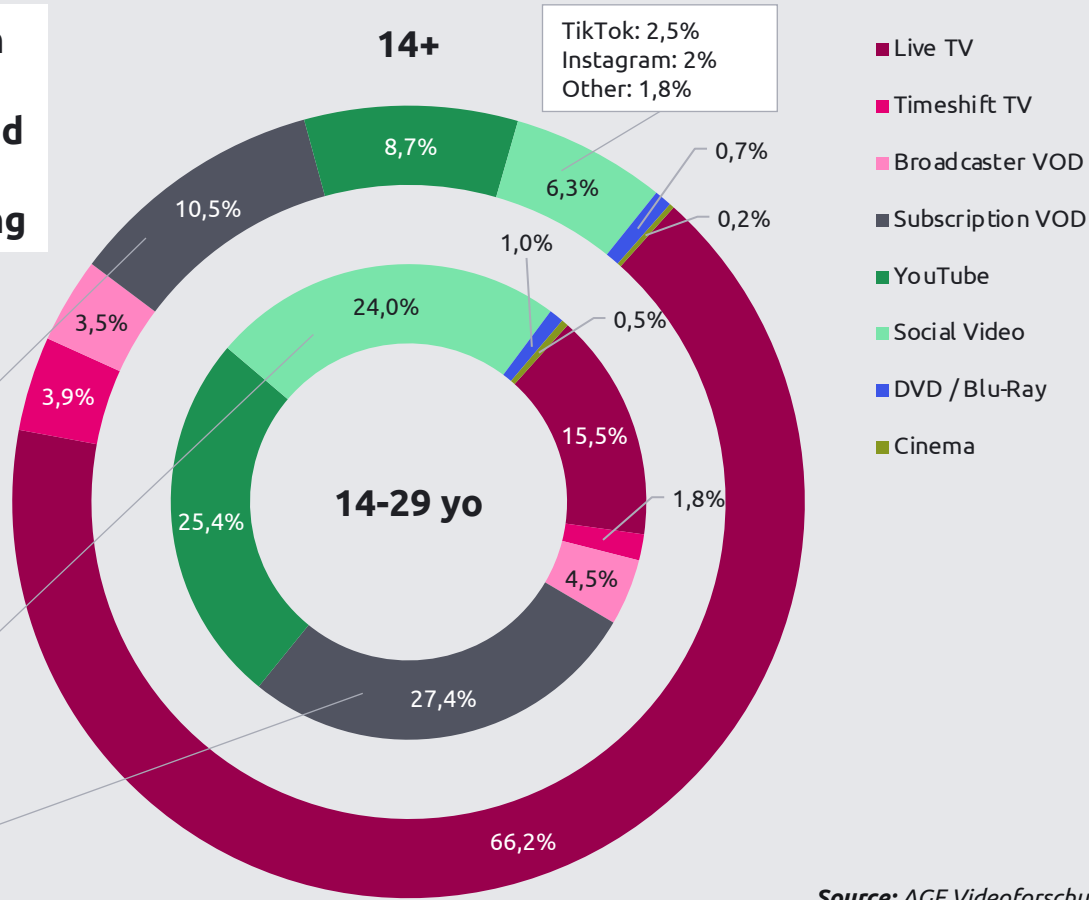
Germany: Total TV accounts for 73,6% of video consumption

Viewing on TV-set for linear TV and all devices for streaming

Netflix: 5,9%
Disney+: 1,8%
Prime: 2,3%
Other: 0,5%

TikTok: 11,9%
Instagram: 7,9%
Other: 4,2%

Netflix: 15,6%
Disney+: 5%
Prime: 5,8%
Other: 1%



Source: AGF Videoforschung; AGF SCOPE 1.7 / ViewTime Report 2024

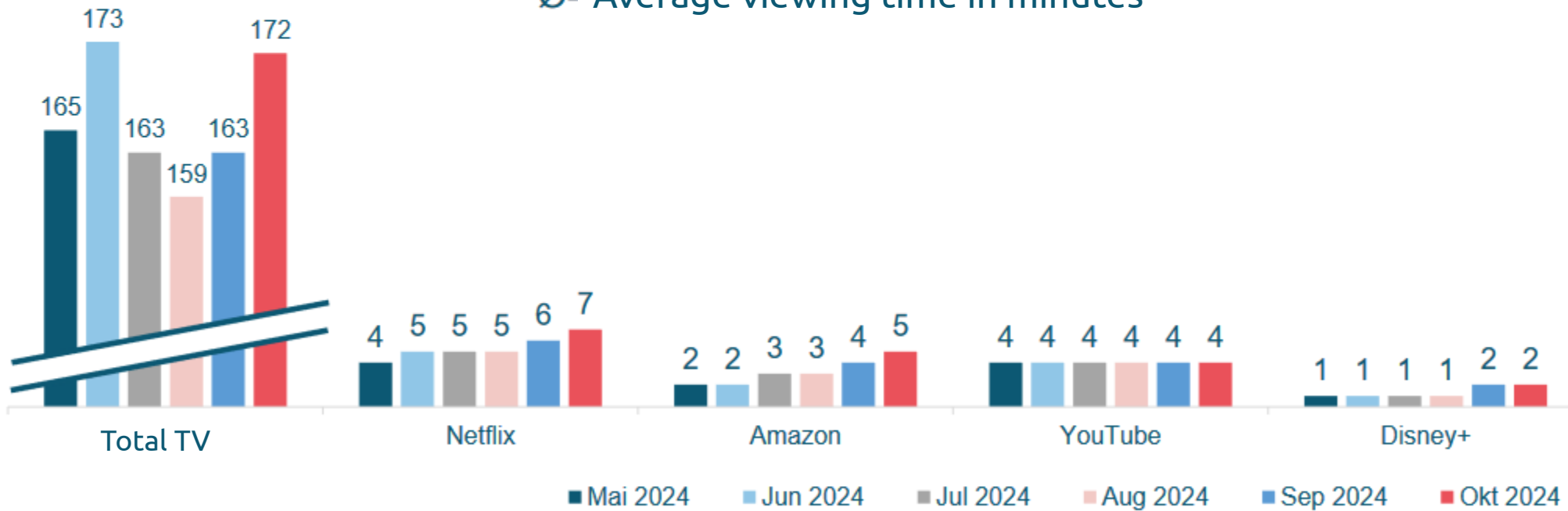
Average video time per day:

- 14+: 285 minutes
- 14 – 29 yo: 225 minutes

EVOLUTION OF VIEWING TIME (May-Oct 2024)

Usage TV content total
and chosen digital platforms on Smart TV
(total population)

Ø- Average viewing time in minutes

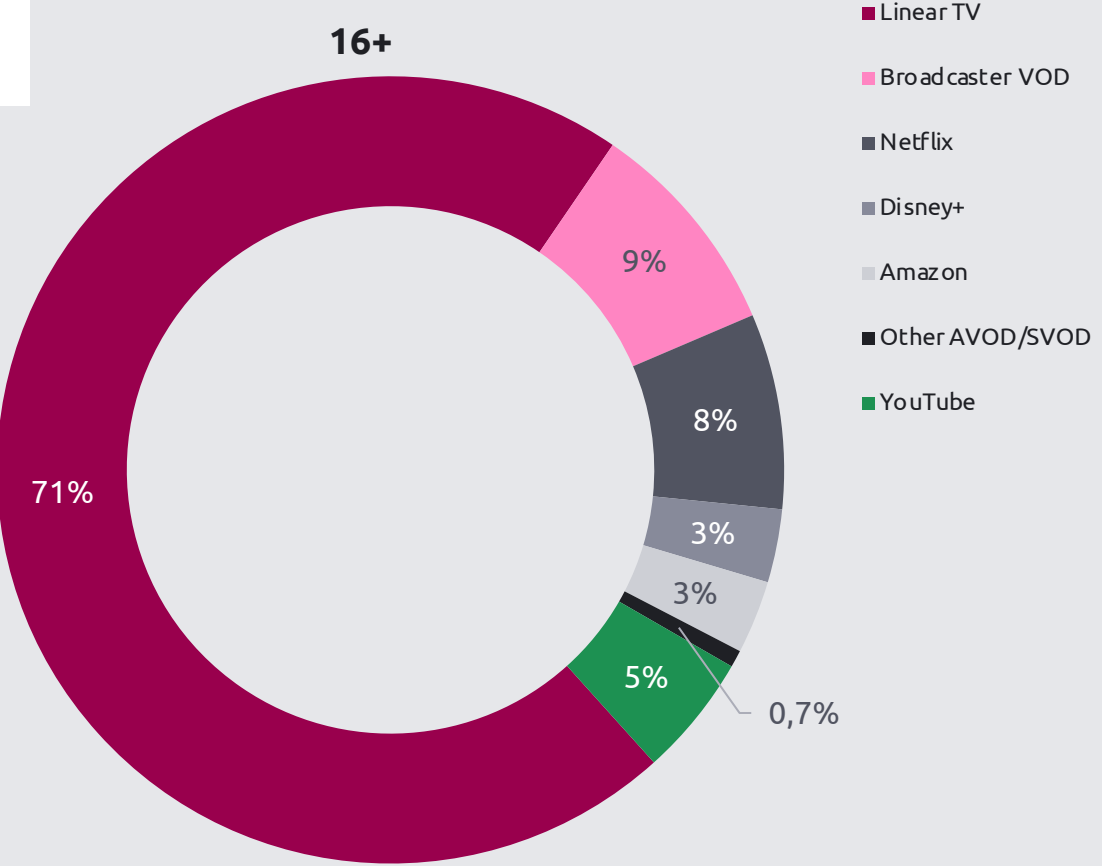


Quelle: AGF Videoforschung; AGF SCOPE 1.8; 01.05.2024-31.10.2024; Marktstandard: TV; Auswertungstyp TV-Zeitintervall; produktbezogen; Paketnummer: 14546 vom 18.11.2024
Abbildung der Plattformen am Smart-TV aus AGF Smart Meter Pilotprojekt; Eigene Berechnungen



UK: Total TV accounts for 80% of video consumption

Viewing on TV set only

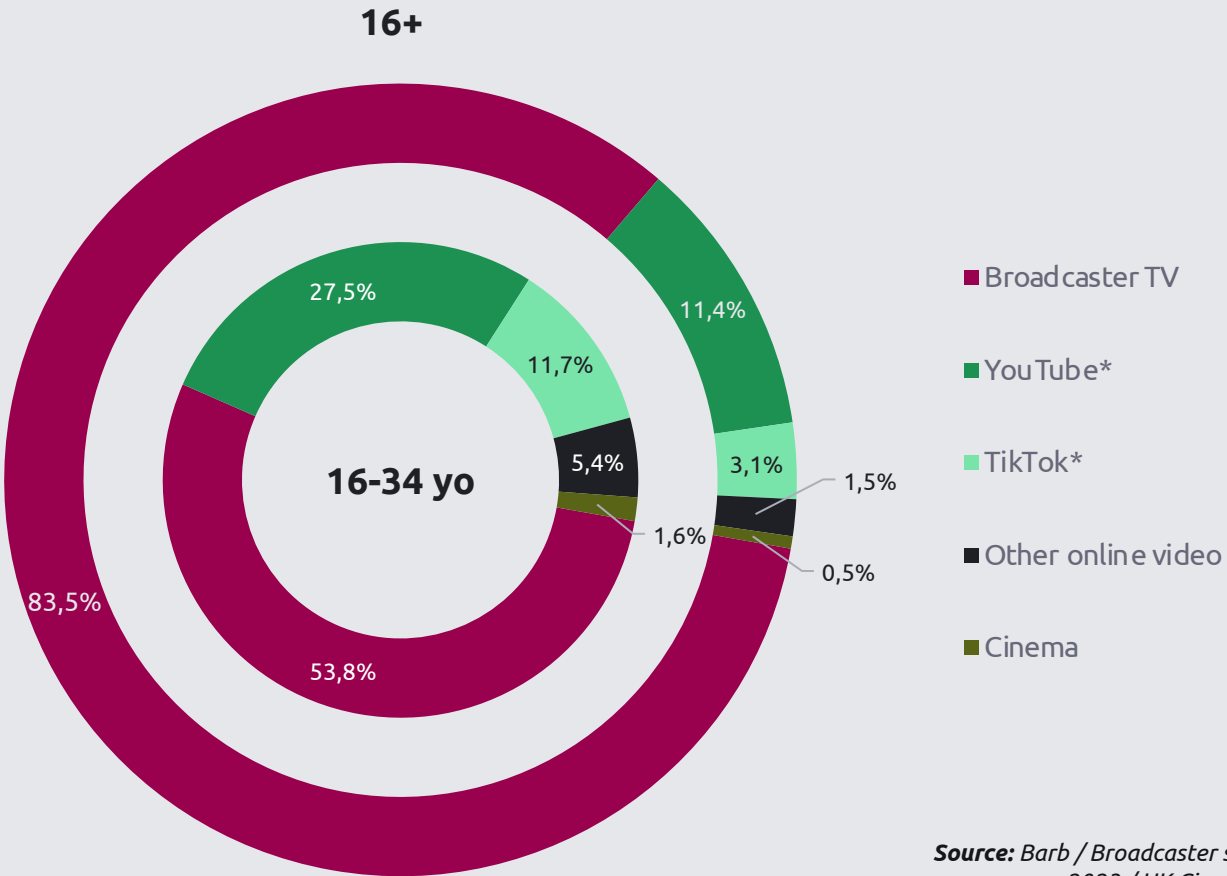


Source: BARB 2023

Average video time per day:

- 16+: 214 minutes

UK: Broadcasters account for 83,5% of the video advertising time



Average video advertising time per day:

- **16+:**
17.0 minutes
- **16-34 yo:**
9.8 minutes

Source: 2023, Barb / Broadcaster stream data / IPA TouchPoints 2023 / UK Cinema Association / ViewersLogic to model OOH viewing time

*YouTube ad time modelled at 4.1% of content time, TikTok ad time modelled at 3.4% of content time using agency and broadcaster data, Other online modelled at 4% of content time.

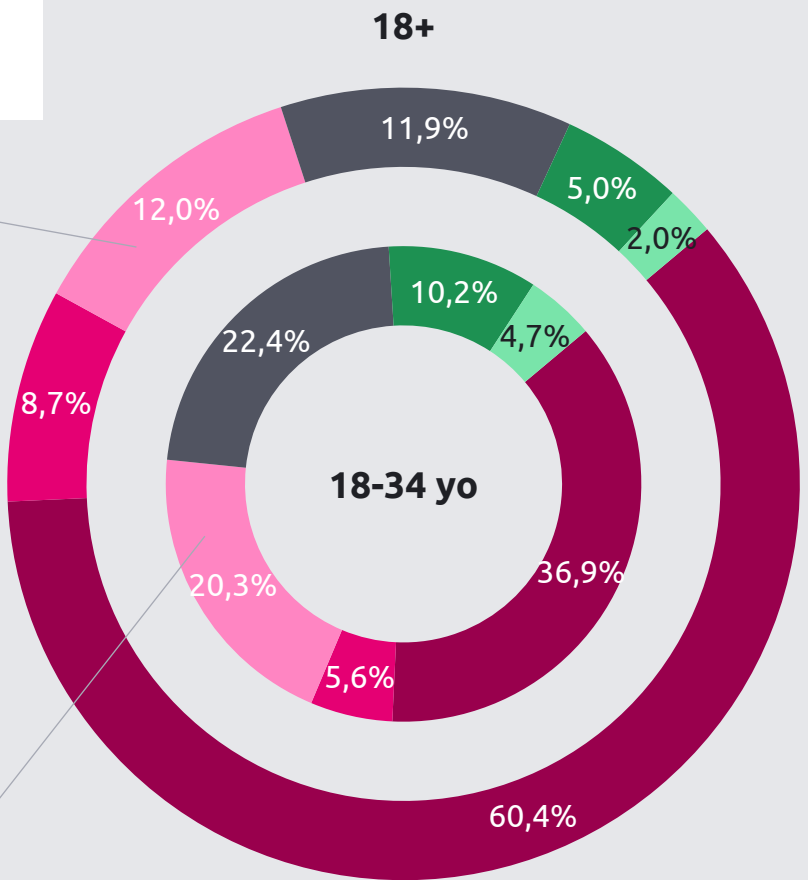
Source: Barb / Broadcaster stream data / IPA TouchPoints 2023 / UK Cinema Association / ViewersLogic

Canada: Multiplatform TV accounts for 69,1% of video consumption

Viewing on all devices

Netflix: 5,5%
 Disney+: 1,4%
 Prime: 4,8%
 Apple+ TV: 0,3%

Netflix: 11%
 Disney+: 1,6%
 Prime: 7,4%
 Apple+ TV: 0,3%



- Live TV
- Timeshift TV + BVOD
- Subscription VOD
- YouTube
- TikTok
- Other video platforms (excl. FB & Instagram video)

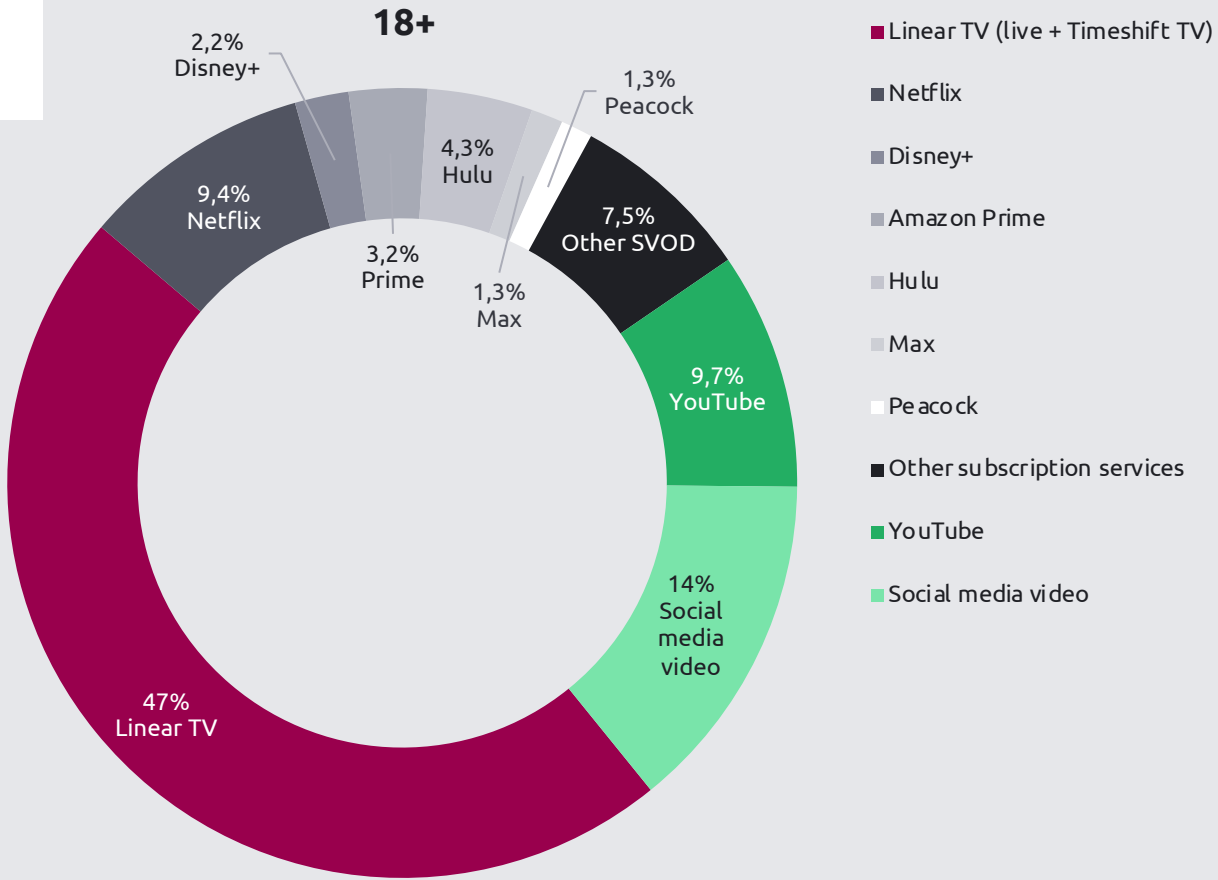
Average video time per day:

- **18+:**
237 minutes
- **18-34 yo:**
167 minutes

Source: Numeris VAM Data, Fall 2023, Ontario + Quebec Franco; streaming services are in-home viewing only

USA: linear TV accounts for 47% of video consumption

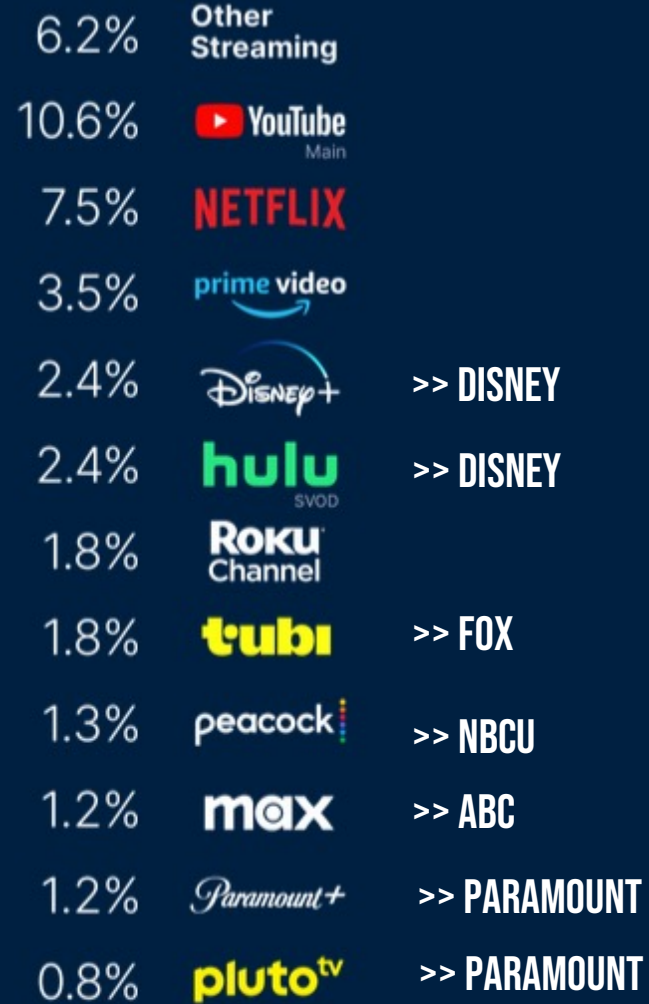
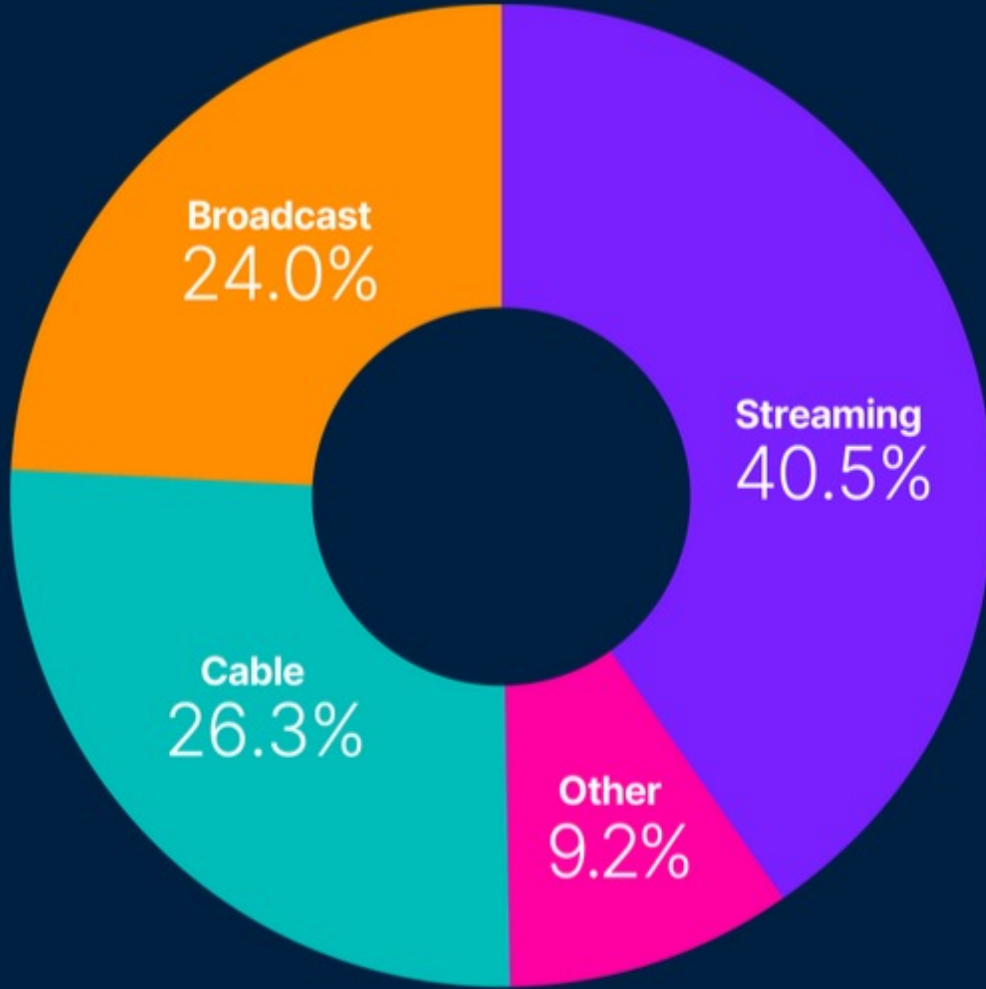
Viewing on all devices



Average video time per day:

- 18+: 372 minutes

Source: eMarketer 2024

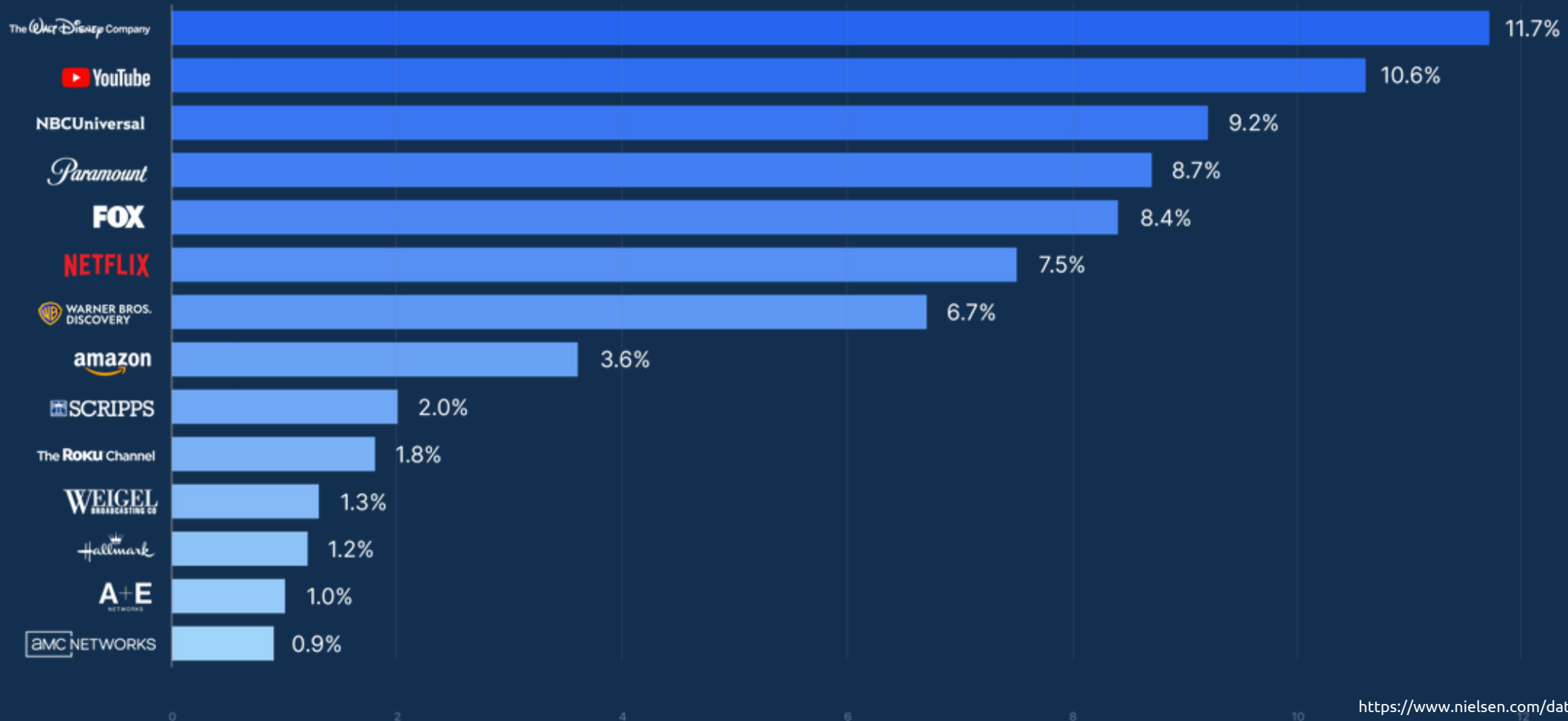


Discover how Americans watch TV across media distributors

Monthly TV viewing by distributor



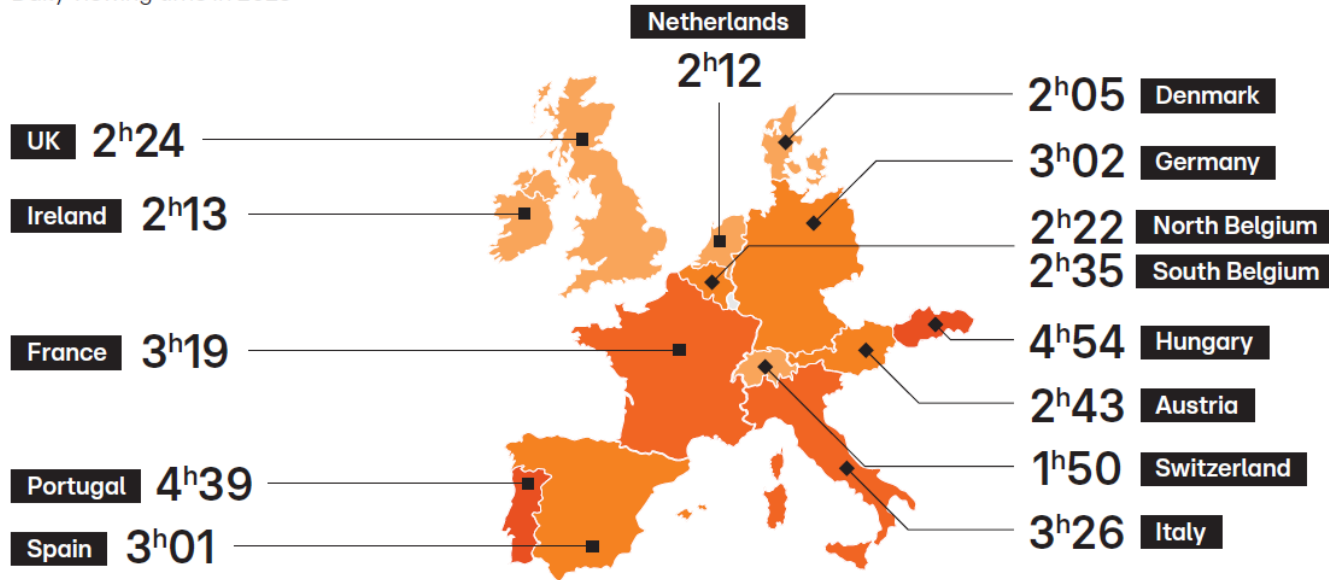
October '24



World perspective : Daily Viewing time of TV

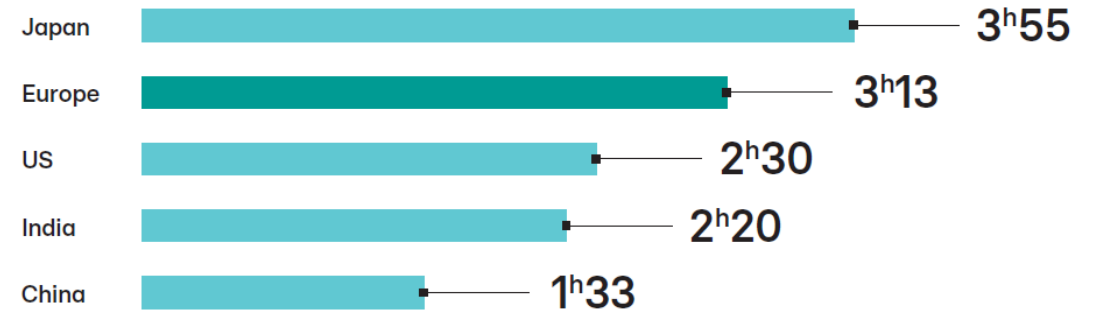
There are strong differences in levels of TV viewing across Europe

Daily viewing time in 2023



TV viewing is much higher in Europe compared with other key markets

2023 average daily viewing time

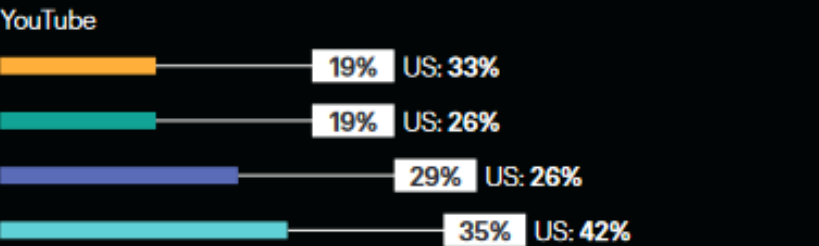
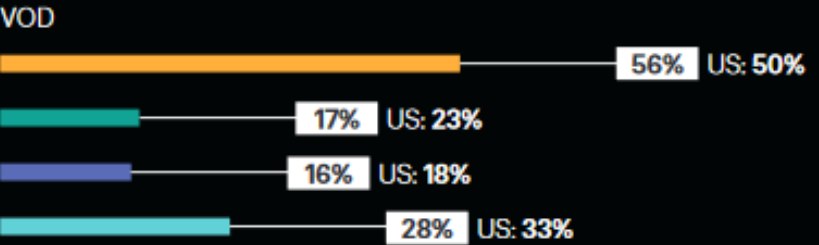
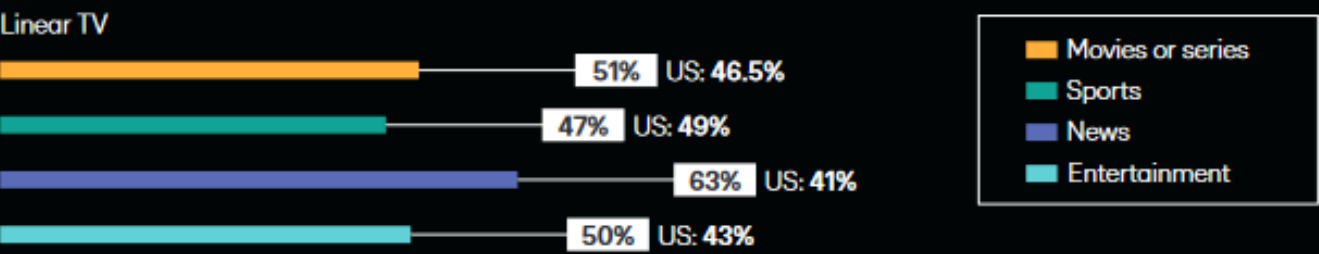


TV KeyFacts

International trends by RTL AdAlliance

Linear TV is strong across all genres

What type of content do you usually watch on...??

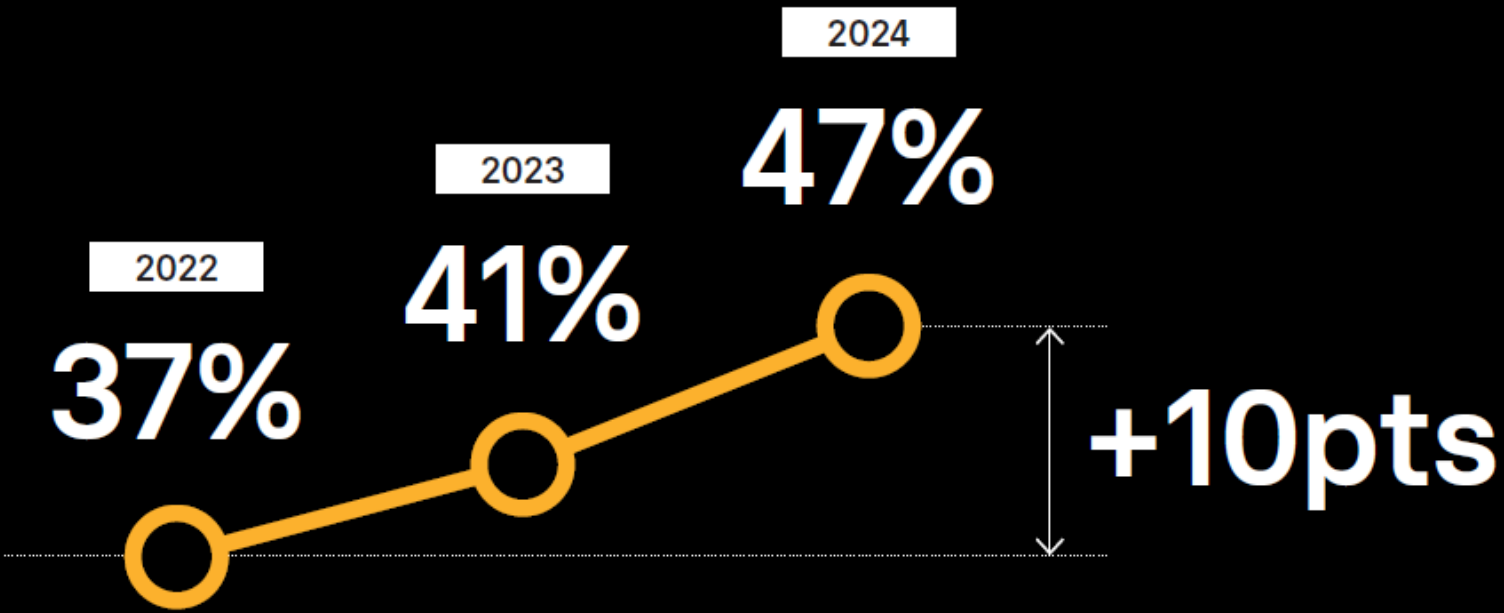


One of the strengths of linear TV is the choice it offers, not only in terms of the FTA (free to air) channels available, but also in the range of genres it covers. Respondents indicated that they usually watch all types of content on linear TV, from sports, to series, to news. While streaming platforms are diversifying their content by bringing in sport and reality programmes, they still focus heavily on series and movies. YouTube, meanwhile, is watched primarily for entertainment content.

¹Basis: "Own a TV set." EU11: N=8,746. ²Basis: "Watch content on a TV set & declared to watch each platform"; Own a TV set. EU11:N=8,631; US: N=893. Source: Norstat for RTL AdAlliance – online field from 5th to 15th of February 2024 – Individuals 18-64 representative of each country in terms of gender, age, employment status and location. 12 countries: UK, France, Germany, Italy, Spain, The Netherlands, Denmark, Finland, Norway, Sweden, Belgium & USA. 1,000 respondents in the main markets and 700 respondents in the NL, Belgium & Nordics.

BVOD is steadily growing

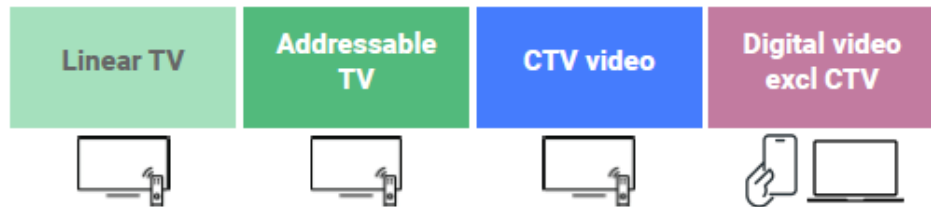
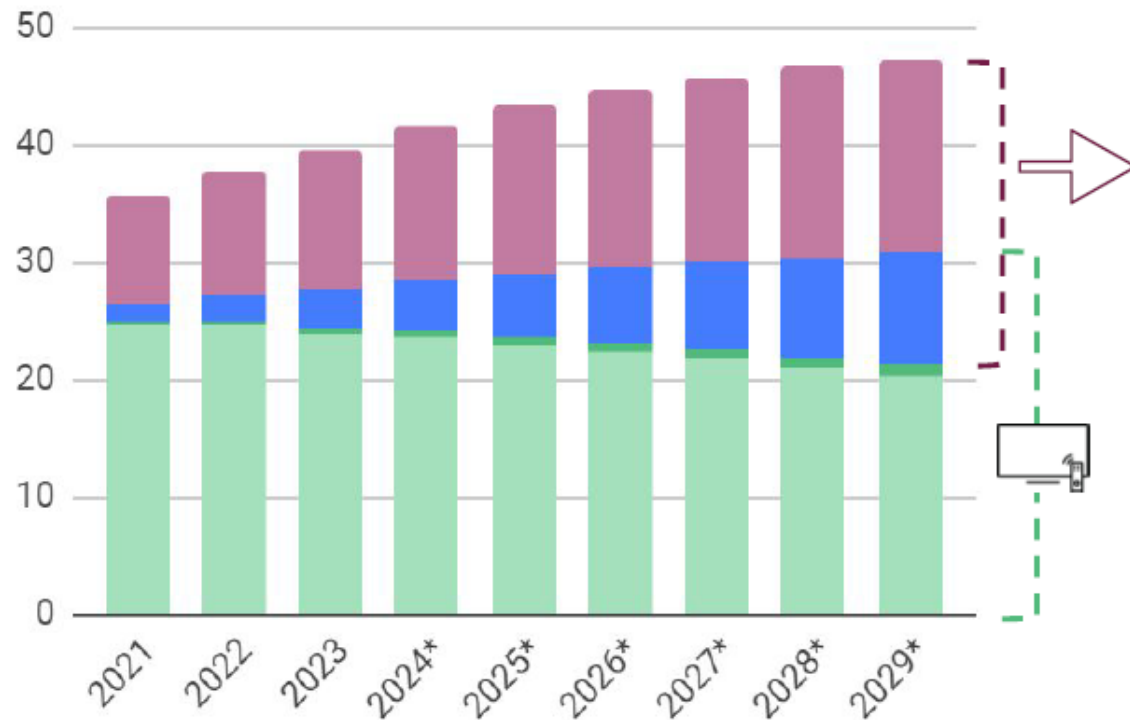
How often do you watch video content (series, films, sports, TV programmes...) on your TV / Smart TV / Connected TV? Answer: At least one to three times a week.¹



European broadcasters set to capture 20% of digital video advertising revenues by 2029

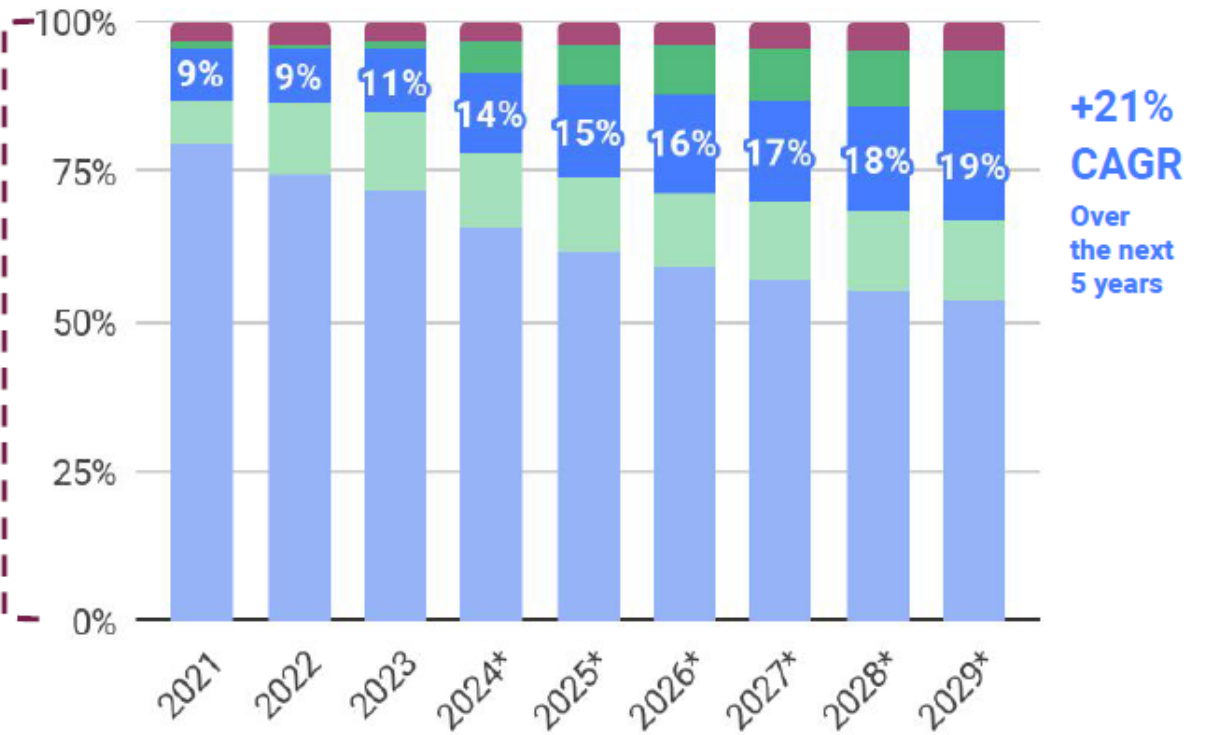
Total video advertising revenues

Revenues in billion EUR

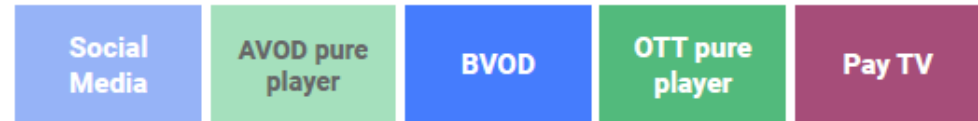


Digital video advertising revenues by typology of platform

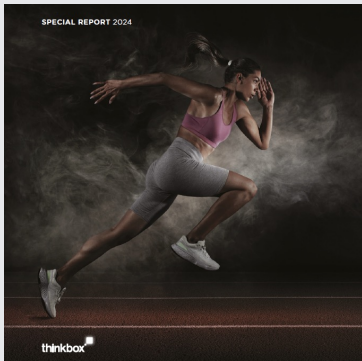
Over total Digital video Advertising revenues



+21% CAGR
Over the next 5 years



TV's effectiveness is proven again and again



UK

PROFIT ABILITY 2 :

The new business case for advertising
Focus: ROI, effectiveness, efficiency

www.thinkbox.tv/profitability2



ITALY

PLAY AD-tention

How audiovisual natives play the challenge of streamcasting
Focus : attention

Ask egta for the English version of the study tv@egta.com



FRANCE

ROITV5

La TV, socle de l'efficacité média
Focus : ROI (ROI at 5,6€ for 1 media invested)

www.snptv.org/etude-snptv-ekimetrics-roitv5/



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