restart

TVKeyFacts

Total Video International Trends

Foreword

We are so excited to publish the 28th edition of the TV Key Facts.

Over the course of this tumultuous period, there has been a vast amount of time for reflection.
We have seen the ongoing importance of TV and video content in a rapidly changing media landscape wherein the consumer plays a bigger role in shaping the agenda. This edition assembles data and insights from the current industry leaders across the globe, who discuss the renaissance of the industry and the future life of the living room.

We also wanted to illustrate this idea of restart through the graphic design of the magazine. The cover of this edition is inspired from the Birth of Venus by Botticelli and is meant to inspire a new hope. It symbolises a shift to a new period where media, consumers and organisations can build the world of tomorrow together, combining the best of innovation with socially responsible and sustainable practices.

Throughout this magazine we hope to enlighten you on how the market is taking this opportunity to rethink its processes, restart with principles of responsibility and recapture loyal audiences.

We are enormously appreciative of all the contributors who shared their predictions on the future of advertising and media, we couldn't do it without you.

Alongside this magazine, you get access to our online database where you can find data on domestic and international channels on numerous platforms in 35 countries worldwide for both TV and digital. You will also find all the information that follows and more on our exclusive TV Key Facts website www.tvkeyfacts.com. Follow the link to discover the future of the media advertising landscape.

Your journey begins here… Enjoy!

The Editorial team:
Carine Jean-Jean, Coraline Sainte-Beuve,
Mélanie Delgado, Izabela Horbaczewska.

**Contact us at
tvkeyfacts@rtladconnect.com
to receive the full study**

35 countries covered.
Television & Digital insights: consumption, content, adspend.
Austria, Belarus, Belgium, Bulgaria, Croatia, Czech Republic, Denmark, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Japan, Latvia, Lithuania, Luxembourg, Macedonia, Norway, Poland, Portugal, Romania, Russia, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, the Netherlands, Turkey, the UK, Ukraine, the US.

TV's Role in Shaping 2021

Stéphane Coruble
CEO,
RTL AdConnect

What a year. A global pandemic, lockdowns, vaccinations. Covid has permanently changed the way we live, work, shop, exercise and relax and the effects of the crisis will be felt for years to come. Trends which were already present before the pandemic have accelerated.

A disrupted market

For advertisers, the pandemic has been a case of stop, start, transform. Brands suspended or decreased their advertising when the pandemic first broke out, then returned to the screens with campaigns that took into account the new realities.
And now they are changing their approach again. Brands are tailoring their advertising strategies to the latest twists and turns in a world where viewing and consumption habits are rapidly changing. Today's marketers are having to adapt to an emerging post-pandemic world of hybrid working, supply chain disruption, labour shortages, a soaring savings rate and growing inflation. This is a time of optimism and challenge as we put the pandemic behind us and rebuild the economy.

TV HAS PROVEN TO BE THE MEDIUM THAT UNITES, REASSURES, INFORMS AND ENTERTAINS

Looking ahead, every medium is set to confront similar challenges in 2022. Whether TV or digital, video or social, out-of-home or print, all media are becoming more data driven, technology-focused and agile. Sales houses are all wrestling with issues such as how best to measure the reach and effectiveness of the ads they place, how to automate and simplify their media booking processes and how they can thrive in an increasingly global advertising market.

The new life of the living room

For media, the past 18 months have been a watershed as families gathered around their TV screens and the living room became the new focus of our daily lives. As people reorganized their nests with new furniture, devices and bigger screens, time spent online has soared and e-commerce has boomed. But despite the growth of digital platforms, TV has won the battle for video content. With 3.54 hours of daily consumption on average in 2020, TV has established itself as the preferred medium of Europeans, while in the United States, viewing reached 3.33 hours a day.
TV has proven to be the medium that unites, reassures, informs, and entertains. From vital news updates about the state of the pandemic to entertaining and comforting people through the long months of lockdown, TV has been the medium that helped people through these hard times.
From what we can observe, as we slowly went back to "normal" in 2021, viewing times are decreasing overall compared with 2020 figures, but in many markets, they're higher than before the crisis (2019). Time will tell if the trend goes on. →

For TV, 2022 will raise more questions about the evolution of video consumption from linear towards non-linear viewing. While traditional viewing surged during the pandemic as families gathered around their TV sets, new ways of watching video also grew. Catch-up TV, time shifted viewing and Broadcaster Video-on-demand (BVOD) platforms became more firmly entrenched in people's viewing schedules.

Creating alternatives to global giants

The rupture of the past 18 months is also accelerating competition between broadcasters, tech platforms and social media networks. But they are not just vying for eyeballs, they are also competing for a place at the heart of community interaction.

A wave of consolidation is sweeping through the global TV industry driven by the need to create local cross-media organisations to compete with the US tech giants. All eyes are turning towards Europe, where local competition authorities are in the process of clearing a series of game-changing mergers in this battle with the GAFAs (Google, Apple, Facebook, Amazon, etc.). In Europe, several mergers between the main local broadcasters have been announced, for instance in France, the Netherlands and Germany. (Read more on pages 5 and 52). These consolidation moves will help to boost the growth of local streaming services. They will also reshuffle the cards of a constantly evolving media ecosystem, which needs to be assessed on a new basis by competition authorities as different media combine.

A WAVE OF CONSOLIDATION IS SWEEPING THROUGH THE GLOBAL TV

If these mergers go ahead as expected, they will provide greater investment for the broadcasters to provide locally produced content and offer an alternative to the global productions created by the streaming giants such as Netflix, Amazon Prime and Disney+. While viewers warm to the big budget series that run in across countries and continents, they still have a large place in their hearts and their viewing schedules for shows which are very local, that tap into domestic culture and appeal to national audiences.

Brands are safe with TV

Against this background of uncertainty and in the face of a complex and fragmented advertising market, global advertisers are looking for simpler ways to access international expertise and find strong solutions for their marketing strategies. After some bad experiences with pure online advertising, they are flooding back to TV as they look for brand safety, transparency, and performance. Therefore, we believe it is essential to offer brands a premium and innovative pan-European alternative.

Brands and media agencies increasingly look for global ad buying opportunities.
RTL AdConnect offers brands seamless connection to a pan-European Total Video portfolio. This includes linear TV, radio, streaming or BVOD services, but also a wide range of digital platforms from premium publishers. Including all RTL Group's European media branches, ITV in the UK, RAI in Italy and Belgium's DPG, our partners count among the biggest broadcasters in Europe: connecting local champions and creating an international cross media sales champion.

TV's connected future

The rapid transformation of the television advertising market, driven by the increasing fusion of traditional linear and digital media, offers game-changing opportunities for data-driven TV advertising, programmatic buying, and innovative new advertising formats.

One of the emerging trends of our era has been the growth of Connected TV (CTV), and further development is taking place across Europe. CTV offers enormous possibilities. Yet, the market for European CTV is fragmented due to the multilingual nature of the continent with its differing business practices, technologies, and TV ecosystems. One of the big challenges for 2022 is to grow CTV across the continent. This will allow broadcasters to offer advertisers opportunities to reach mass audiences, but also to run precise and targeted campaigns as well. We will see the spread of addressable TV advertising (ATV), where campaigns are targeted at individual households, as well as data-driven advertising on catch-up channels. TV will be able to offer both brand building and performance-driven advertising.

The social role of TV

Social platforms tend to monopolize the very idea of community and socialization by becoming the default networks for conversations, controversy and sharing points of view. But it is inescapable that TV's role is truly social, and it is a key vehicle for community, togetherness and solidarity.

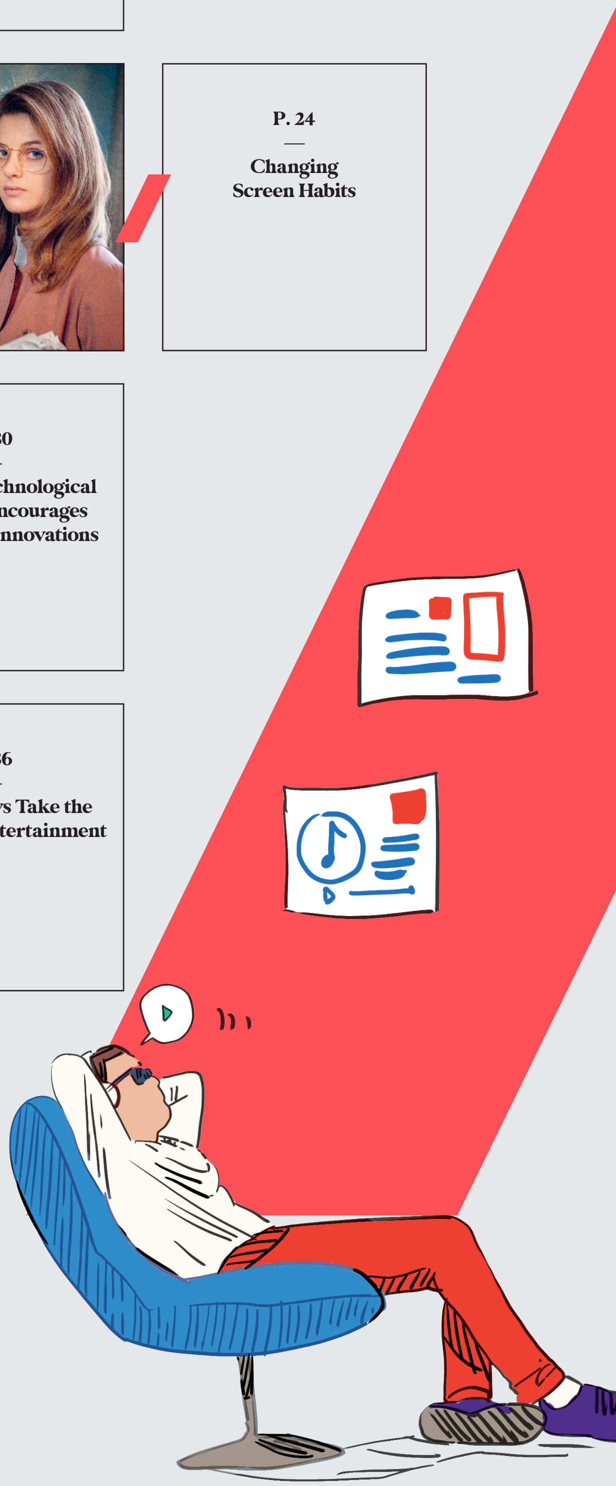
One of the most marked facets of the Covid-19 pandemic was how people turned to trusted and reliable news brands in a time of crisis as they sought clarity and leadership. TV became once again the primary medium for keeping people informed and transmitting all-important messages about the pandemic. This stood in stark contrast to the fake news and Covid scepticism that spread on the open web.

Journalism is a vital pillar of democratic societies, and combating fake news is one of TV's biggest contributions to social good, helping keep people accurately informed about the pandemic and how they should stay safe. This is an era when all organisations are called upon to demonstrate their broader social purpose and to make real their promises to improve the world for all. Brands are using TV advertising to show their commitment to social and environmental issues, while TV stations are also showing how they are tackling social problems such as mental health issues, inclusivity and climate change.

BRANDS ARE USING TV ADVERTISING TO SHOW THEIR COMMITMENT TO SOCIAL AND ENVIRONMENTAL ISSUES

The transformation of the world brought about by Covid has been immense, but we still have not yet witnessed all its after-effects. The world really has changed, with a greater emphasis on purpose and values and a new focus on the meanings of freedom and social responsibility. Issues of diversity, inclusion and equality have become even more important. Crucial questions surround public trust in institutions, whether government, health services or the media. The pandemic has sparked interest in issues such as work/life balance, climate change, sustainability, mental health and general well-being.

The impact of the pandemic is multi-faceted and the TV industry must pay attention to make sure this industry reflects social trends and the people's changing demands. In 2022, TV will play a vital role in driving these trends. And, in the process, broadcasting itself will be transformed.



The Total Video Stats You Need

Top Advertising Sectors and Advertisers

2020 was a difficult year for the advertising market as many brands had to rethink, replan or simply stop advertising because of the lockdown situation. But despite the pandemic, TV remained the main advertising destination and big brands maintained high levels of advertising spends.

46%

TV share of media expenditure European average

TV SHARE OF MEDIA EXPENDITURE

TOP 3 ADVERTISING SECTORS

Country	*TV Share of Media Expenditure*	*Trend*	*1*	*2*	*3*
Hungary	89.8%	↑	Food	Cosmetics & Pharmaceuticals	Retail & Delivery
Croatia	75.4%	↓	Culture, Tourism, Leisure	Food	Beauty & Hygiene
Italy[1]	67.6%	↑	Retail	Food	Personal & Body Care products
Netherlands	59.0%	↑	Food	Distribution	Automotive & Transport
Germany	48.3%	↓	Services	Cosmetics & Toiletries	Food
France	47.0%	↑	Medicinal products	Trade	Food
Belgium	41.0%	↑	Food	Automotive	Retail
Spain[1]	33.6%	↓	Transport	Services	Household equipment
Switzerland	31.7%	↑	Retail	Food	Personal Care
Austria	30.5%	↑	Food	Retail	Beauty
United Kingdom	27.8%	↓	Food	Cosmetics & Body Care	Digital & Home
Luxembourg	8.4%	=	Food	Finance	Entertainment & Leisure
Europe	**46.0%**		**Food**	**Retail/Transport**	**Beauty/Hygiene**

[1]Net figures. Source: Local institutes, gross figures, January-December 2020.

Source: Local institutes, January-December 2020.

MOST ADVERTISED SECTORS ON TV

Food | **Retail & Transport** | **Beauty & Hygiene**

Source: Local institutes, January-December 2020.

TOP 3 ADVERTISERS

Country	1	2	3
Austria	Procter+Gamble	XXXLutz	Ferrero
Belgium	Procter+Gamble	Colruyt Group	Ahold Delhaize
Croatia	Lidl	Kaufland	Konzum Plus D.O.O
France	Procter+Gamble	Ferrero	Renault Automobiles
Germany	Procter+Gamble	Ferrero	L'Oréal
Hungary	Glaxo-Smithkline	Sanofi-Aventis	Procter+Gamble
Italy[1]	Stellantis Gruppo	Ferrero	Procter+Gamble
Luxembourg	Post Luxembourg	Freelander's	Coca Cola
Netherlands	Ahold	Procter+Gamble	Unilever
Spain[1]	L'Oréal	Procter+Gamble	Reckitt Benckiser
Switzerland	Procter+Gamble	Coop	Ferrero
United Kingdom	Unilever	Procter+Gamble	Reckitt Benckiser
Europe	**Procter+Gamble**	**Ferrero**	**Reckitt Benckiser**

Source: Local institutes, January-December 2020.

Key take away

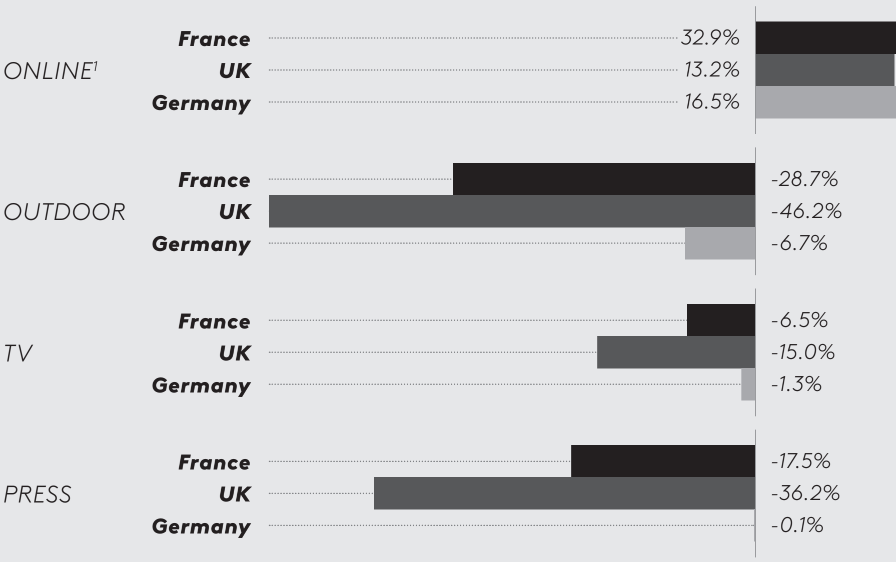
The big brands have maintained high levels of advertising.

P&G, Ferrero and Reckitt Benckiser remained the largest TV advertisers in Europe.

BIGGEST TV ADSPENDERS

1. P&G
2. FERRERO
3. Reckitt Benckiser

ADSPEND'S EVOLUTION 2020 VS 2019



The Covid-19 crisis has had a negative impact on advertising investments. Despite a drop in global advertising investments, the TV market proved to be more resilient than the press and outdoor.

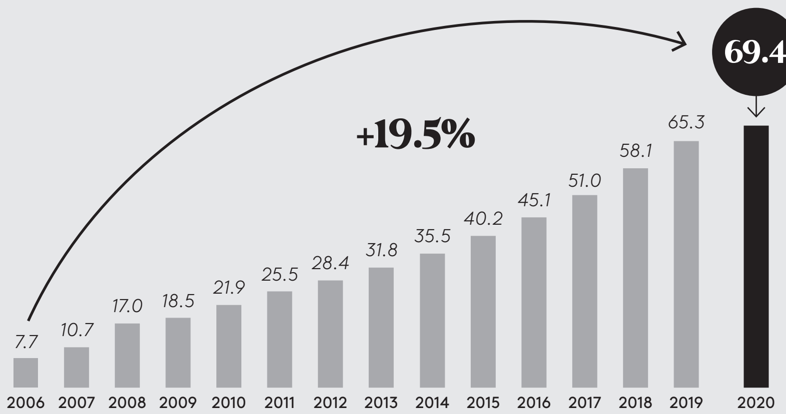
[1]*Refers to display/video advertising: advertising on websites or apps through banners images, flash, video, and audio - excluding everything linked to social media platforms (YouTube, Facebook...) and excluding search as well (Google search related ads). Source: Local institutes: Kantar Media (France), The Nielsen Company GmbH (Germany), Nielsen Ad Dynamix (UK).*

The Rise of the Digital Advertising Sector

Digital advertising is booming and growing every year in Europe. This sector includes digital audio and digital video, which are already highly used in the UK and Germany.

DIGITAL ADVERTISING GROWTH

Total digital adspend in Europe (€bn)



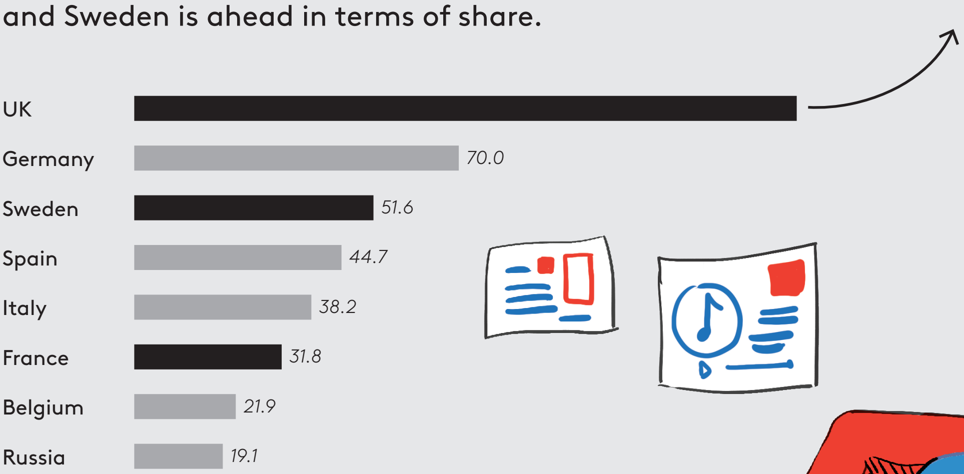
Key take away
The growth of digital advertising is increasing every year and has grown by 19.5% since 2006. Digital is becoming increasingly important to viewers and it's a turning point for brands to invest more in this area.

DIGITAL AUDIO

Digital Audio Ad Spend in 2020 (€m)

UK is the largest market, France leads growth and Sweden is ahead in terms of share.

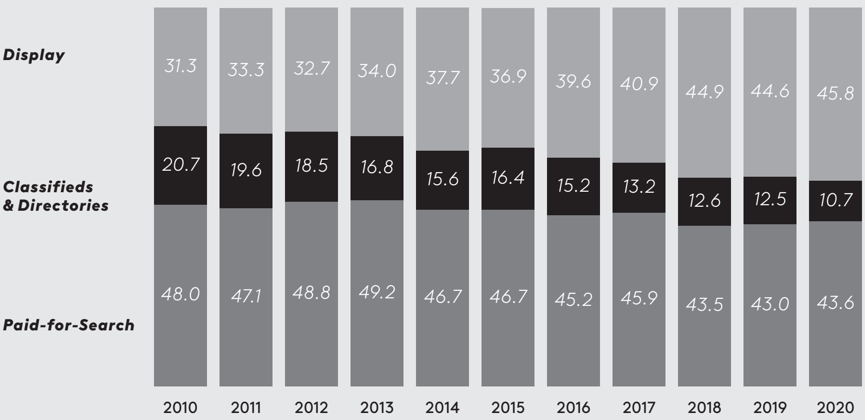
142.9M



Source: IAB Europe, AdEx Benchmark 2020 Report. IAB Europe's AdEx Benchmark is the definitive guide to the state of the European digital advertising market. The report details facts and figures from across 28 market in Europe including market size, growth and digital advertising investment by channel and format.

DIGITAL ADSPEND SPLIT BY FORMAT

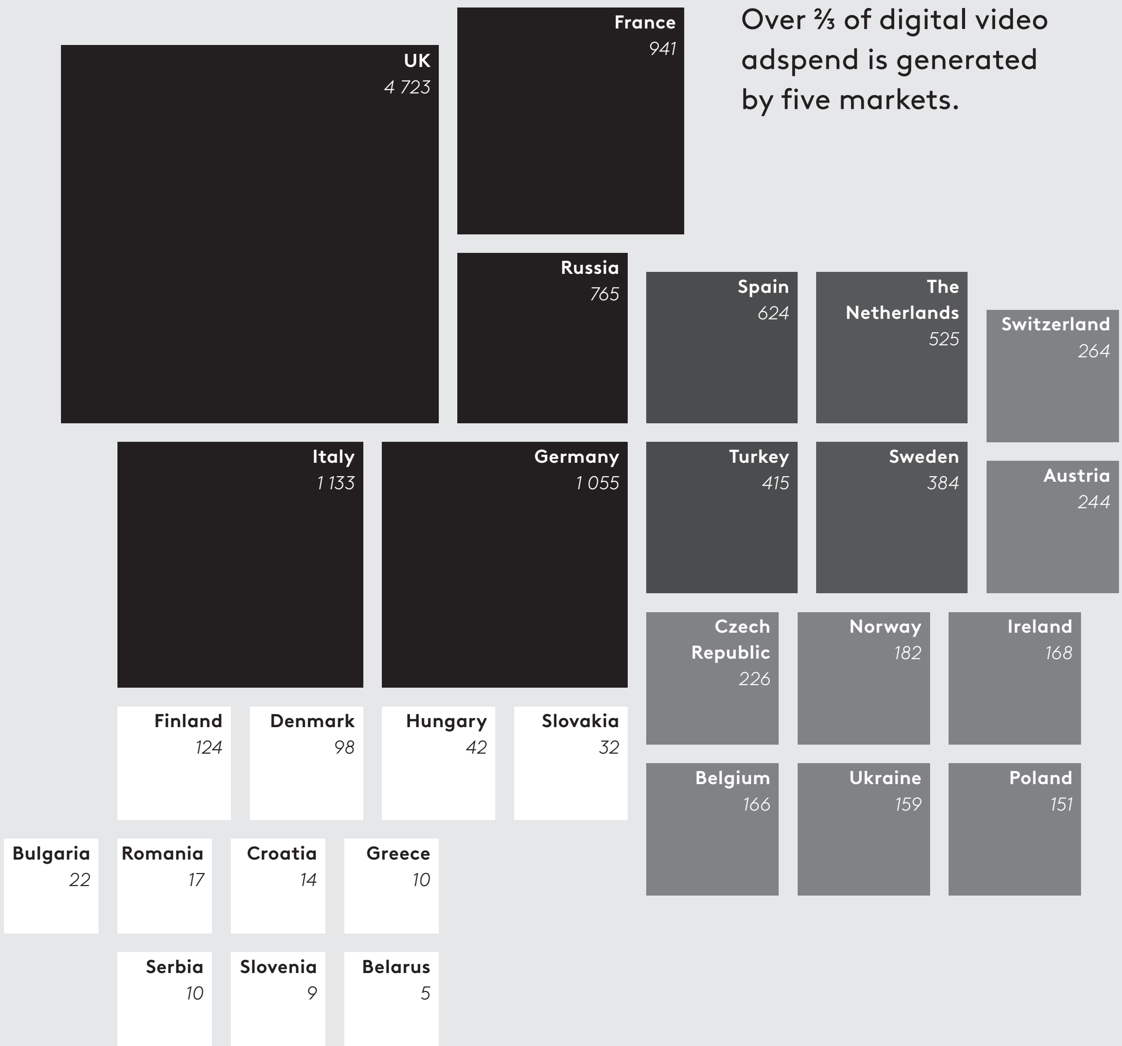
(in %)



Display could accelerate share gains in 2020.

DIGITAL VIDEO ADSPEND IN 2020

(€m)



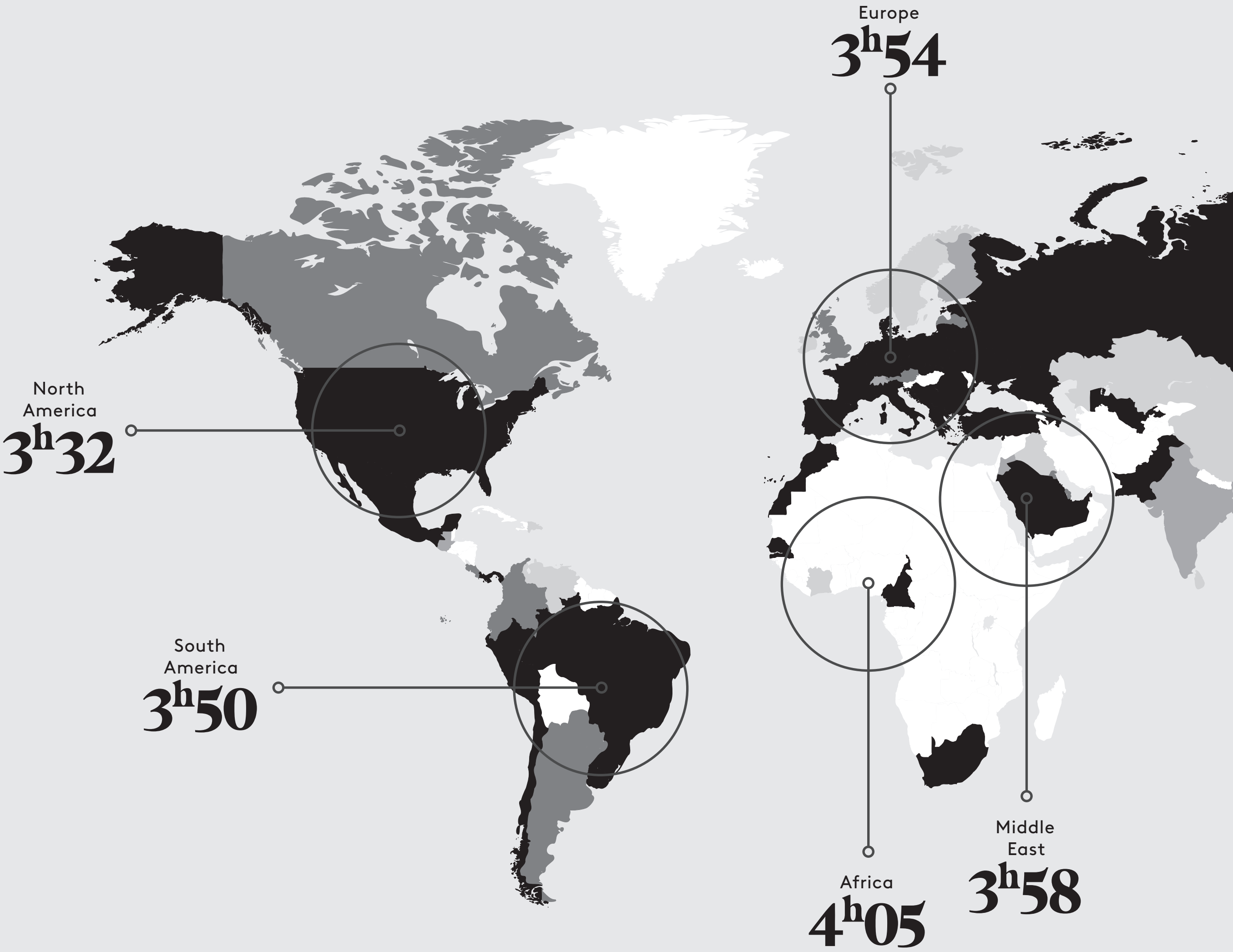
Over ⅔ of digital video adspend is generated by five markets.

Source: IAB Europe, AdEx Benchmark 2020 Report. IAB Europe's AdEx Benchmark is the definitive guide to the state of the European digital advertising market. The report details facts and figures from across 28 market in Europe including market size, growth and digital advertising investment by channel and format.

A Total Video World

TOTAL INDIVIDUALS' VIEWING TIME

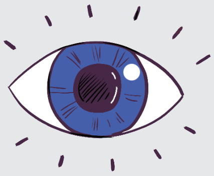
January-December 2020



TV viewing time compared with the world average

More than 30 minutes below the average	From 0 to 30 minutes below the average	From 0 to 30 minutes above the average	More than 30 minutes above the average	n.a.

Average



WORLDWIDE VIEWING TIME IN 2020

Universe: 4.1 billion, 91 countries

2020 **2h54** → **+6min.** VS 2019

ASIA

Universe: 2.6 billion, 16 countries

Bangladesh, Cambodia, China, India, Indonesia, Japan (Kansai Kanto and Nagoya territories), Malaysia, Mongolia, Pakistan (30+ cities), Philippines, Singapore, South Korea, Sri Lanka, Taiwan, Thailand, Vietnam.

2020 **2h24** → **+4min.** VS 2019

NORTH AMERICA

Universe: 402 million, 3 countries

Canada, Mexico, United States.

2020 **3h32** → **-8min.** VS 2019

EUROPE

Universe: 676 million, 37 countries

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

2020 **3h54** → **+15min.** VS 2019

AFRICA

Universe: 90 million, 5 countries

Cameroon, Ivory Coast, Morocco, Senegal, South Africa.

2020 **4h05** → **+18min.** VS 2019

SOUTH AMERICA

Universe: 154 million, 14 countries

Argentina, Brazil, Chile, Colombia, Costa Rica, Dominican Republic, Ecuador, Guatemala, Panama, Paraguay, Peru, Puerto Rico, Uruguay, Venezuela.

2020 **3h50** → **+10min.** VS 2019

MIDDLE EAST

Universe: 141 million, 14 countries

Armenia, Bahrain, Iraq, Israel, Jordan, Kazakhstan, Kurdistan, Kuwait, Lebanon, Qatar, Saudi Arabia, Turkey, United Arab Emirates, Uzbekistan.

2020 **3h58** → **+19min.** VS 2019

OCEANIA

Universe: 30 million, 2 countries

Australia (Cities & Regional), New Zealand.

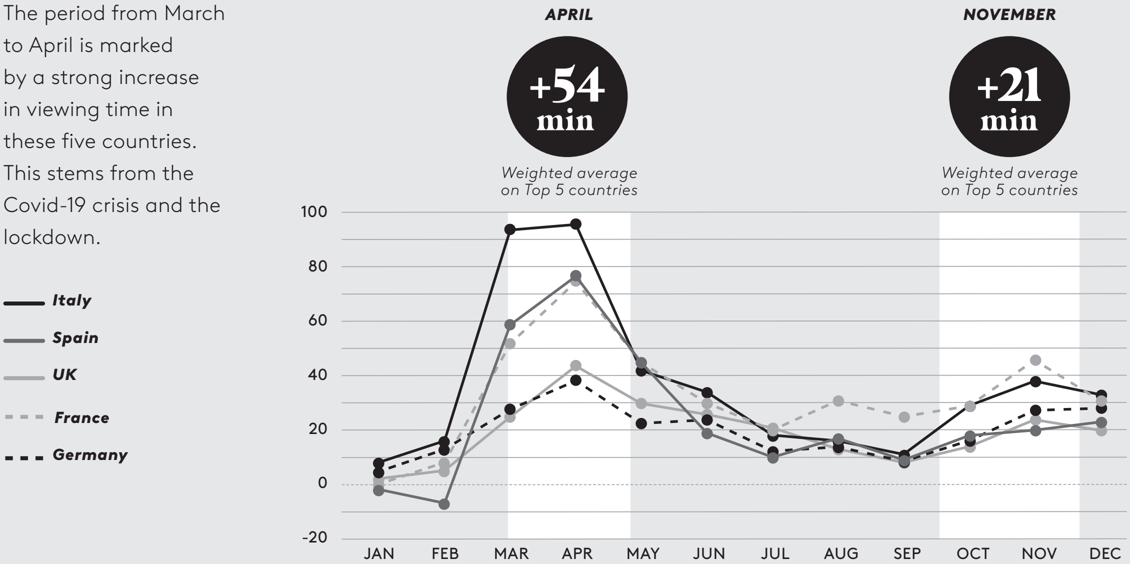
2020 **2h09** → **-1min.** VS 2019

Covid-19 Global Total Video Consumption

MONTHLY EVOLUTION OF VIEWING TIME IN MINUTES

Viewing time development in minutes monthly, Ind. 3+/4+, 2020 vs 2019[1]

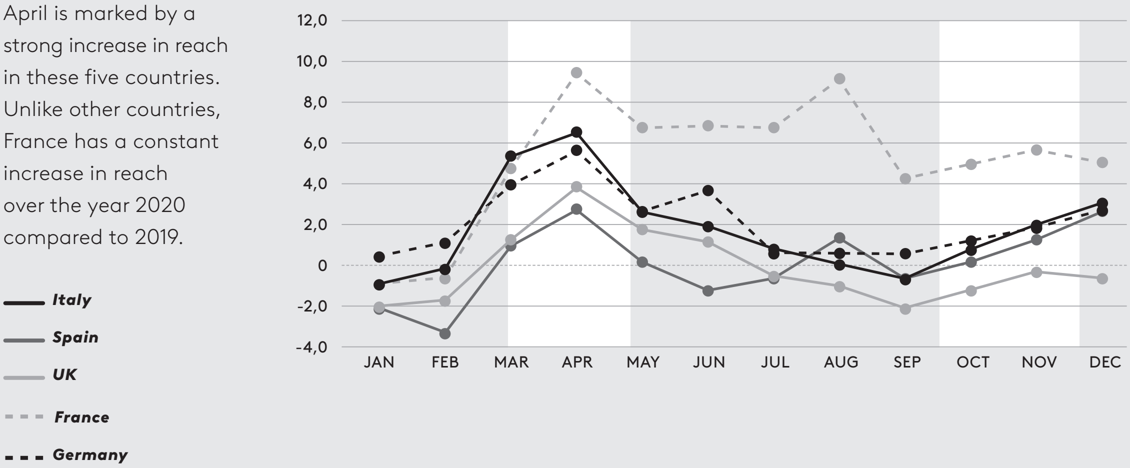
The period from March to April is marked by a strong increase in viewing time in these five countries. This stems from the Covid-19 crisis and the lockdown.



MONTHLY EVOLUTION OF REACH IN POINTS

Daily reach development in points monthly, Ind. 3+/4+, 2020 vs 2019[2]

April is marked by a strong increase in reach in these five countries. Unlike other countries, France has a constant increase in reach over the year 2020 compared to 2019.



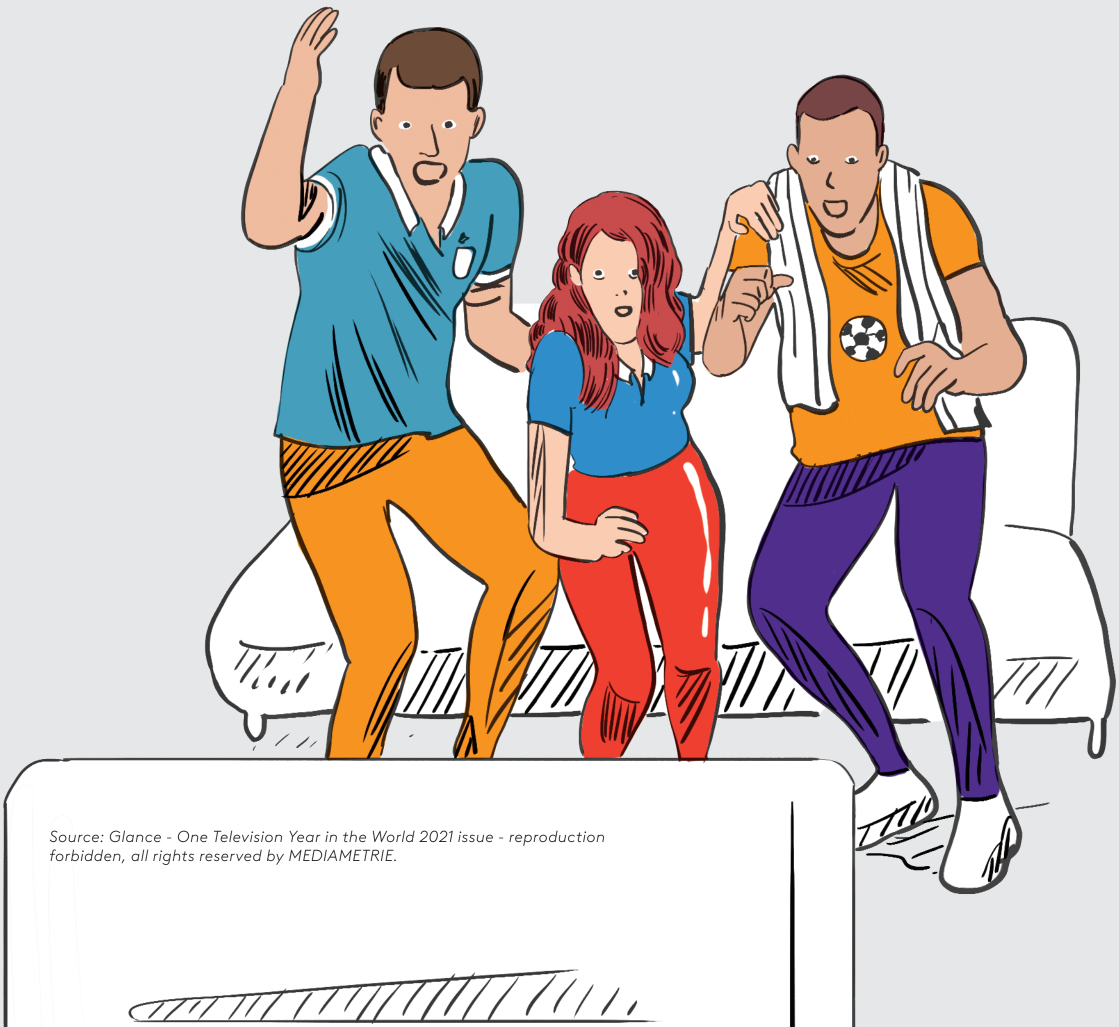
[1]Source: Local institutes 2020, evolution versus previous year based on average daily viewing time per individual in minutes, Total TV, All day, Ind 3+/4+;
[2]Source: Local institutes 2020, evolution versus previous year based on average dailyTV reach in %, Total TV, All day, Ind 3+/4+.

TV WAS THE GO-TO VIDEO PLATFORM DURING THE COVID-19 CRISIS

2020 vs 2019

ITALY	SPAIN	FRANCE
+28 min.	**+15 min.**	**+28 min.**
$4^{h}04$	$3^{h}42$	$3^{h}30$
↓	↓	↓
$4^{h}32$	**$3^{h}57$**	**$3^{h}58$**

UK	GERMANY
+9 min.	**+9 min.**
$3^{h}03$	$3^{h}31$
↓	↓
$3^{h}12$	**$3^{h}40$**



Source: Glance - One Television Year in the World 2021 issue - reproduction forbidden, all rights reserved by MEDIAMETRIE.

Viewing Time per Individual

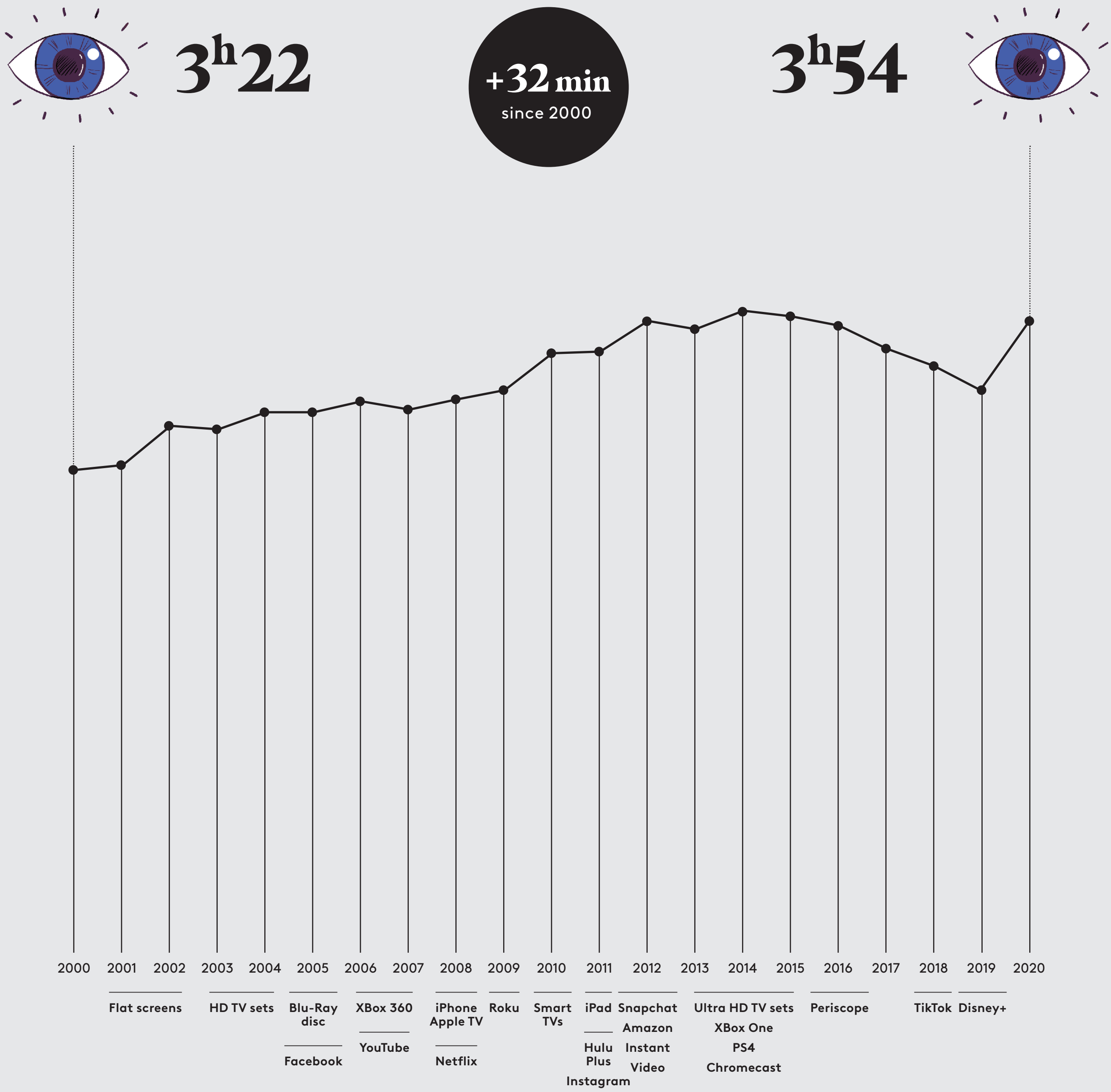
Country	Target Group *Individuals*	2020 *Mon-Sun*	Daily Reach *in %, all day*	Viewers during Peak *Mon-Fri*	Maximum Peak *Mon-Fri*
Austria	3+	195	68.1	3 240 000	20:45
Belarus	4+	246	68.0	2 130 000	21:00
Belgium North	4+	220	75.3	2 830 000	20:30
Belgium South	4+	259	72.7	1 660 000	21:15
Bulgaria	4+	270	77.3	2 600 000	20:45
Croatia	4+	282	66.2	1 650 000	21:00
Czech Republic	4+	222	70.7	4 270 000	21:00
Denmark	3+	135	59.0	1 780 000	20:30
Finland	4+	167	66.7	1 900 000	20:45
France	4+	229	75.0	24 953 000	20:45
Germany	4+	220	69.0	31 260 000	20:45
Greece	4+	308	73.4	4 700 000	22:30
Hungary	4+	295	73.5	4 220 000	20:30
Ireland	4+	159	65.0	1 430 000	21:00
Italy	4+	268	73.2	25 780 000	21:30
Latvia	4+	180	67.0	707 000	21:00
Lithuania	4+	232	65.2	1 050 000	21:00
Luxembourg	15+	131	59.0	186 000	21:00
Macedonia	4+	290	62.7	723 000	21:15
Netherlands	6+	160	70.4	6 620 000	21:00
Norway	2 to 79	109	52.7	1 200 000	21:00
Poland	4+	270	68.0	14 500 000	21:00
Portugal	4+	350	88.8	5 190 000	22:00
Romania	4+	312	72.0	7 843 000	21:15
Russia	4+	230	65.4	42 282 000	21:00
Serbia	4+	340	68.1	3 140 000	21:15
Slovakia	4+	262	72.0	2 310 000	21:00
Slovenia	4+	210	70.0	739 000	21:00
Spain	4+	230	68.7	16 450 000	22:30
Sweden	3+	129	58.0	3 000 000	21:00
Switzerland (G)	3+	170	71.3	1 680 000	20:15
Switzerland (F)	3+	142	64.2	605 000	21:15
Switzerland (I)	3+	119	62.1	128 000	21:30
Turkey	5+	273	67.0	26 090 000	21:30
Ukraine	4+	225	63.0	11 750 000	21:00
United Kingdom	4+	192	69.4	23 190 000	21:00
Total Europe[1]		235	68.9	215 414 000	
United States	2+	213	n.a	84 568 000	20:45
Japan	4+	288	n.a	15 760 000	20:15

[1]Weighted average without Estonia & Cyprus. Source: RTL AdConnect, Glance, local institutes, One Television Year in the World 2021 issue - reproduction forbidden, all rights reserved by MEDIAMETRIE.

My Brilliant Friend, Rai

Changing Screen Habits

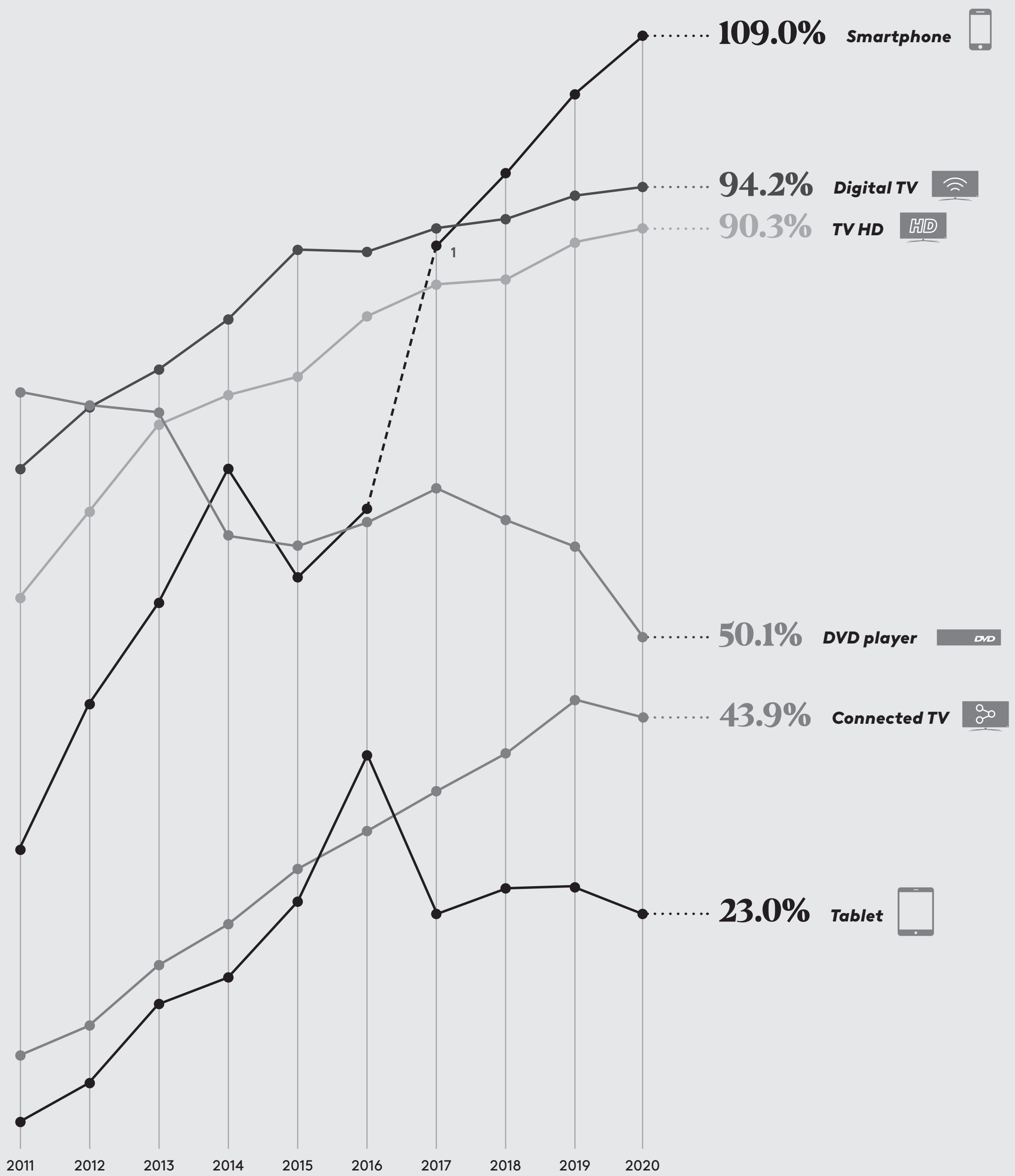
EVOLUTION OF THE EUROPEAN AVERAGE DAILY TV VIEWING TIME SINCE 2000
(Total Individuals 2000-2020, in minutes)



Europe in 2020: Austria, Belarus, Belgium, Bosnia & Herzegovina, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Georgia, Germany, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Lithuania, North Macedonia, Moldova, Netherlands, Norway, Poland, Portugal, Romania, Russia, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Ukraine, United Kingdom. Source: Glance / Relevant partners.

DEVICE PENETRATION IN EUROPE

(% of households, 2011-2020)



[1]Data not comparable due to a change of measurement. Europe in 2020: 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, UK, Ukraine. [1]Data not comparable due to a change of measurement. Source: Omdia ©2020.

TV, the Home of Audiences

THE TOP EVENTS OF 2020

141M

THE BIGGEST AUDIENCE[1]
2020 CCTV Spring Festival
China, January 24, 2020
on CCTV 1 General, CCTV 4, Beijing Satellite.

The CCTV New Year's Gala, also known as the Spring Festival Gala, is a Chinese New Year special broadcast. It first aired in 1983 and quickly became the country's longest-running variety show. The five-hour gala includes musical numbers, dancing, comedy sketches, magic shows and other artistic performances. In 2020, the CCTV Spring Festival kept its title of the most watched programme in the world with 141 million viewers.

110M

THE BIGGEST AUDIENCE FOR A SPORTS EVENT[1]
NFL Super Bowl 54
United States & Canada (National), February 2, 2020
on FOX & CTV

The annual American football championship competition of NFL Super Bowl 54, was watched by nearly 110 million people in the United States and Canada. This event was even watched by more than 3.5 million viewers in France (TF1), Germany (PRO7), Italy (20), Spain (Vamos & Movistar Deportes 1) and the UK (BBC1, Sky Sports Mix & Sky Sports NFL).

77M

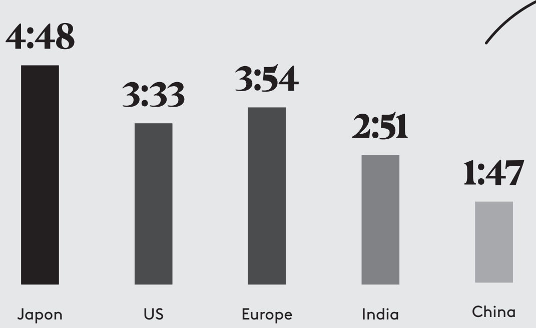
THE BIGGEST AUDIENCE FOR A SERIES[1]
Ramayan
India, April 16, 2020
on DD NATIONAL

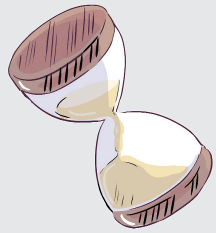
Originally aired between 1987 and 1988, the series was re-aired during the 2020 Covid-19 lockdown. Based on the ancient Hindu epic Ramayana, the series follows the journey of Rama who goes into 14 years of exile along with Sita and Lakshman. In 2020, the series gathered 77 million viewers.

[1]Based on Rat000. Source: Glance - One Television Year in the World 2021 issue - reproduction forbidden, all rights reserved by MEDIAMETRIE.

TV HOLDS A SIGNIFICANT PLACE IN PEOPLE'S DAILY LIVES

2020 average daily viewing time[1]





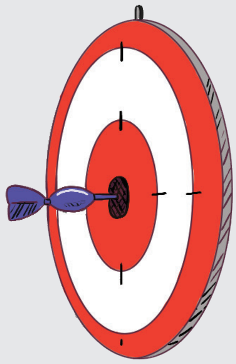
+32 min

Evolution of European viewing time since 2000

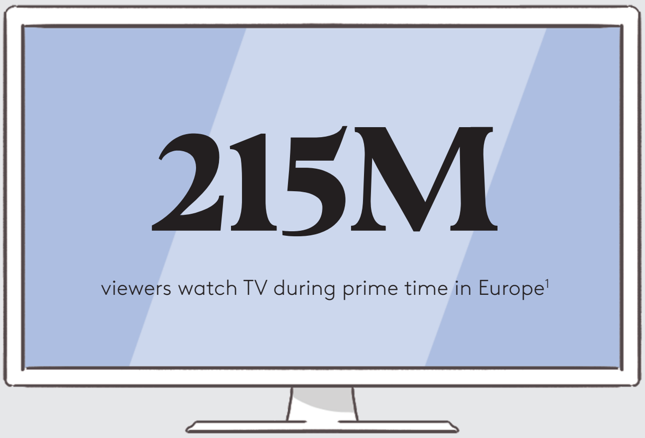
TV IS THE MEDIA FOR MASS AND FAST REACH

2020 average daily TV reach in the EU[1]

70.3%



PRIME TIME



Key take away

In 31 European countries, 215 M viewers watch TV during prime time. Despite the difficulties of the Covid-19 crisis, TV helped bring people together.

[1]*Based on 31 coutries: Germany, Italy, France, UK, Spain, The Netherlands, Hungary, Austria, Belgium, Denmark, Switzerland, Croatia, Norway, Luxembourg, Sweden, Czech Republic, Poland, Slovenia, Finland, Ukraine, Lithuania, Macedonia, Serbia, Slovakia, Belarus, Bulgaria, Latvia, Ireland, Portugal, Romania, Greece. Source: RTLAdConnect, Glance, Local TV audience institutes, January-December 2020.*

Device Penetration

Country	Population in 000	Households in 000	TV HH in %	TV HH in 000	IPTV in % of TV HH	Connected TV in % of HH
Austria	8 884	3 984.8	98	3 908	9	48
Belarus	9 442	3 967.7	100	3 956	43	21
Belgium	11 779	5 001.2	97	4 851	34	43
Bulgaria	6 919	2 918.8	99	2 895	14	28
Croatia	4 209	1 537.9	99	1 523	33	26
Cyprus	1 281	330.5	99	323	43	38
Czech Republic	10 703	4 395.5	96	4 240	11	42
Denmark	5 895	2 708.2	96	2 605	17	52
Estonia	1 220	549.0	99	593	37	45
Finland	5 587	2 723.2	97	2 643	14	45
France	68 084	30 108.9	94	28 388	55	49
Germany	79 903	41 908.3	97	40 772	8	59
Greece	10 570	4 290.4	99	4 229	8	34
Hungary	9 728	4 257.4	99	4 230	24	39
Ireland	5 225	1 841.9	93	1 707	6	42
Italy	62 390	26 352.4	98	25 868	0	44
Latvia	1 862	801.5	97	778	31	37
Lithuania	2 711	1 382.7	92	1 278	23	20
Luxembourg	640	260.6	103	268	27	65
Macedonia	2 128	647.6	95	618	22	25
Netherlands	17 337	7 905.7	99	7 855	29	50
Norway	5 509	2 466.5	99	2 454	37	57
Poland	38 186	14 457.6	98	14 219	7	41
Portugal	10 264	4 189.4	100	4 185	55	36
Romania	21 230	7 385.7	95	7 019	2	36
Russia	142 320	59 785.8	97	57 829	16	36
Serbia	6 974	2 400.4	97	2 329	27	35
Slovakia	5 436	1 965.6	97	1 912	20	47
Slovenia	2 102	845.7	97	823	45	38
Spain	47 260	18 690.0	100	18 717	26	44
Sweden	10 261	4 683.2	100	4 671	28	52
Switzerland	8 453	3 806.9	98	3 720	47	51
Turkey	82 482	24 536.2	97	23 689	6	34
Ukraine	43 746	16 643.0	98	16 275	1	10
United Kingdom	67 081	27 613.6	98	27 027	8	52
Total Europe	817 801	337 343.9	97	328 398	17	42
United States	334 998	126 182.0	99	124 424	6	—
Japan	124 687	55 254.6	96	53 069	7	57

Source : RTL AdConnect, CIA, Glance, Omdia, local institutes - reproduction forbidden, all rights reserved by MEDIAMETRIE, January-December 2020.

Country	Smartphones penetration *in %*	PC penetration *in %*	Tablet penetration *in %*	Broadband household penetration *in %*	Mobile data subscriptions per household *in %*
Austria	121	69	29	64	380
Belarus	–	–	–	69	303
Belgium	119	70	30	74	321
Bulgaria	–	–	–	56	378
Croatia	100	37	3	74	333
Cyprus	–	–	–	86	613
Czech Republic	109	43	20	58	369
Denmark	141	78	52	88	363
Estonia	–	–	–	56	371
Finland	94	79	57	57	403
France	90	75	38	93	301
Germany	120	85	38	77	334
Greece	137	68	8	84	342
Hungary	101	45	3	67	285
Ireland	90	58	30	70	316
Italy	115	64	14	59	352
Latvia	–	–	–	53	364
Lithuania	–	–	–	57	320
Luxembourg	–	–	–	78	357
Macedonia	–	–	–		381
Netherlands	91	82	39	84	337
Norway	93	80	28	81	337
Poland	115	34	23	44	382
Portugal	132	73	15	84	408
Romania	–	–	–	64	380
Russia	119	36	11	50	420
Serbia	–	–	–	53	344
Slovakia	95	36	18	70	410
Slovenia	93	43	17	63	288
Spain	98	66	18	70	337
Sweden	117	81	37	79	389
Switzerland	115	78	22	93	278
Turkey	79	22	15	54	324
Ukraine	–	–	–	30	324
United Kingdom	–	–	–	86	345
Total Europe	109	58	23	66	354
United States	–	–	–	82	411
Japan	96	77	31	77	346

Source : RTL AdConnect, CIA, Glance, Omdia, local institutes - reproduction forbidden, all rights reserved by MEDIAMETRIE, January-December 2020.

Growing Technological Adoption Encourages Advertising Innovations

With the growing penetration of connected TVs and IPTV, innovative options are being added to TV advertising. More and more households receive a digital TV signal, which will allow advertisers to rethink how they connect with consumers.

97.4%

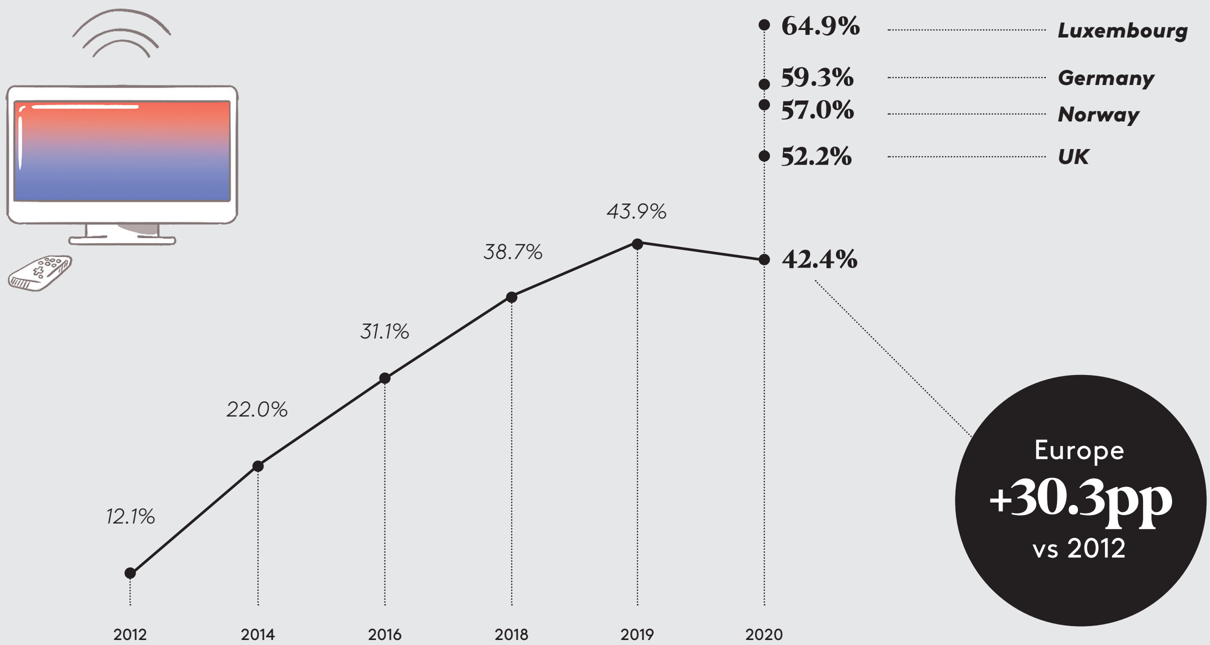
of European households own at least one TV set[1]

66%

of European households have broadband internet[1]

THE INCREASING PENETRATION OF CONNECTED TV HAS A BIG IMPACT ON VIDEO CONSUMPTION AND AD TARGETING

The number of connected TV sets increased in Europe and has reached 42.4% and has grown by 11.3% since 2016.

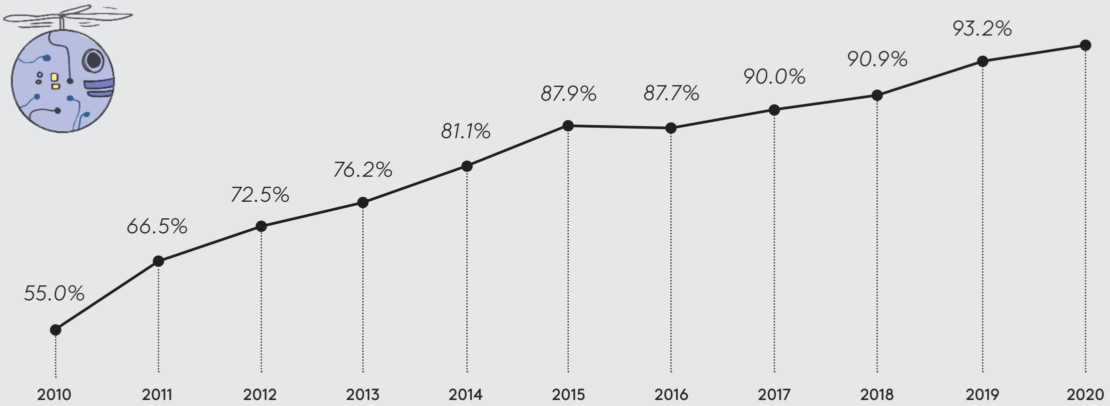


[1]Data 2020. Source: RTL AdConnect, IHS Market, local institutes, Omdia.

ALMOST ALL TV HOUSEHOLDS IN EUROPE ARE DIGITALISED

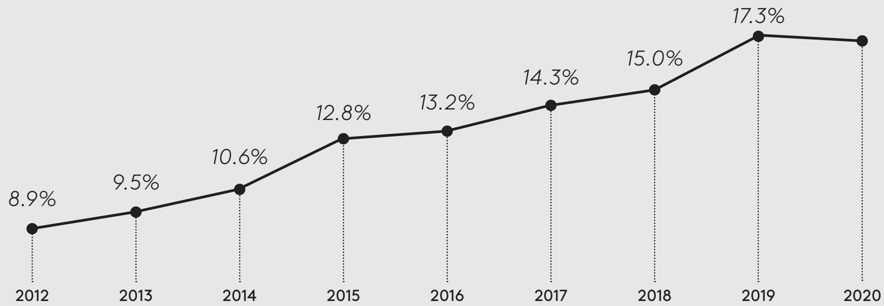
In 2020, 94.2% of European TV households received a digital TV signal.

94.2%



IPTV'S GROWING PENETRATION IN EUROPE IS OPENING UP MORE ADDRESSABLE TV OPPORTUNITIES

17.1%

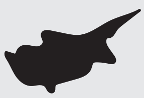


IPTV is widely used in France, Portugal and Switzerland.

54.9%
France

54.7%
Portugal

47.0%
Switzerland



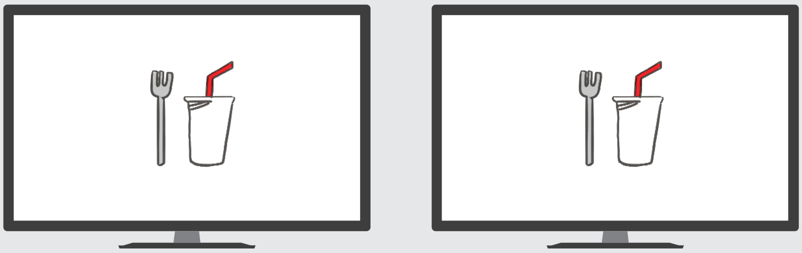
The only countries that still use analogue terrestrial diffusion are Turkey (10.5%), the Netherlands (9.2%) and Belarus (4.7%).

Source: RTL AdConnect, IHS Market, local institutes, Omdia.

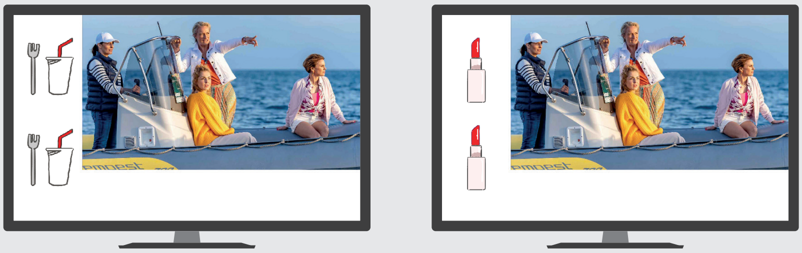
Addressable TV on the Rise in Europe

Addressable TV arguably offers the best of CTV and allows both TV and Digital advertisers alike to bolster their media strategies by offering the ability to segment households and tailor their messages on the big screen.

Traditional TV
Viewers of the same programme ***see the same ads.***



Addressable TV
Viewers of the same programme ***see different ads.***

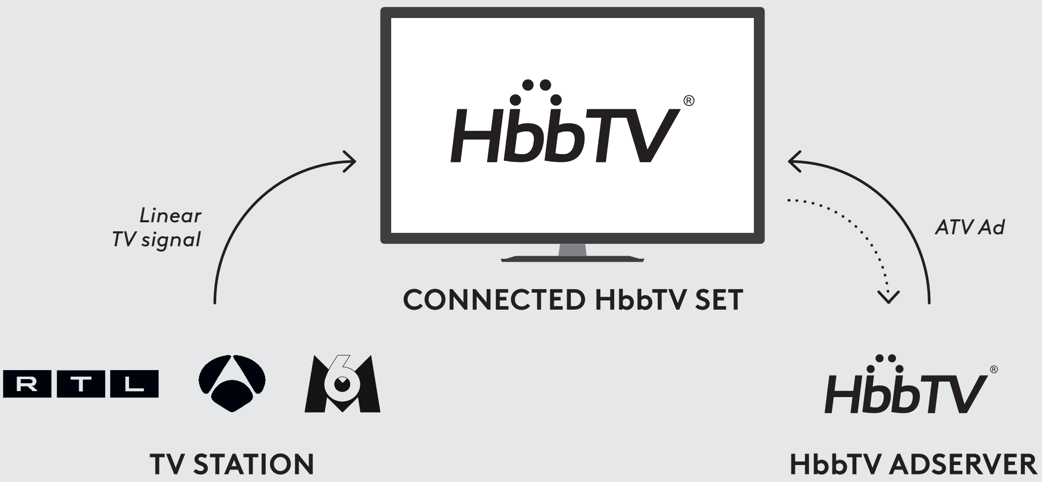


HbbTV

HbbTV is an operating system within the TV set, allowing the overlay of digital content within the linear broadcast signal.

ATV

The continuous demand for high quality, professional broadcast content has given rise to exponential growth in Addressable TV advertising, where digital technologies have allowed broadcasters to segment their linear TV audiences, and deliver tailored advertising at household level. The ATV opportunities that HbbTV makes possible, offers advertisers the best of Connected TV; targeted ads on the TV screen, and within Europe's leading broadcast channels.



Source: HbbTV.

HBBTV IN EUROPE

Spain

13M

HbbTV compatible devices (any HbbTV version)[4]

Germany

15M

HbbTV connected devices[1]

Austria

1.4M

devices deployed (39%)

France

1.75M

HbbTV connected devices[3]

Italy

4.05M

HbbTV connected devices[2]

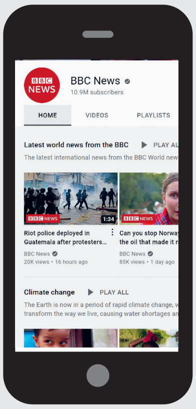
[1]HbbTV internal elaboration June 2020; [2]HbbTV internal elaboration on broadcasters data December 2020; [3]HbbTV internal elaboration October 2020; [4]HbbTV internal elaboration on broadcasters data, May 2020. Source: HbbTV.

YouTube Consumption Trends

Since Covid-19, news and politics have a very important place on YouTube, increasing by +16% in Q1 2021 vs Q1 2020. It's the genre with the biggest change, ahead of gaming and Home & DIY.

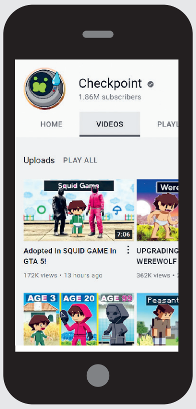
FASTEST GROWING YOUTUBE GENRE Q1 2021[1]

Growth in %



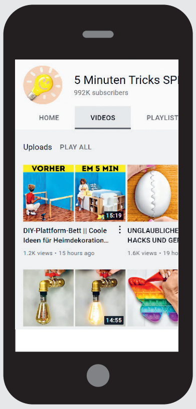
News & Politics

+16%



Gaming

+13%



Home & DIY

+10%

TOP 3 YOUTUBE GENRES IN 2020[2]

Views

1 931 993 M

MUSIC & DANCE

1 448 228 M

ENTERTAINMENT

1 439 508 M

KIDS ENTERTAINMENT & ANIMATION

Worldwide figures. [1]These figures show each genre's growth compared to the average growth of that genre on YouTube in that market. Source: Tubular Labs. Based on 2019 vs 2020 video views from creators with over 10M lifetime views uploading in each country; excludes 'General Interest' genre. [2]These figures show the top genres by views from 01.01.2020 to 31.12.2020. Source: Tubular Labs. Based on 2020 video views from creators with over 10M lifetime views uploading in each country; excludes 'General Interest' genre.

TOP 20 MOST VIEWED MEDIA & ENTERPRISE PROPERTIES, GLOBAL - 2020

	1	MOONBUG	75 289 393 087
	2	T-SERIES	68 608 991 693
	3	SONY PICTURES ENTERTAINMENT	64 416 606 136
	4	WARNERMEDIA	62 428 885 314
	5	COMCAST	61 098 342 112
	6	THE WALT DISNEY COMPANY	58 825 365 750
	7	ESSEL CORPORATE	57 719 815 299
	8	VIACOMCBS	55 716 251 688
	9	THESOUL PUBLISHING	54 850 180 892
	10	BABYBUS	25 309 643 405
	11	INFOBELLS	22 604 928 959
	12	GOLDMINES TELEFILMS	21 979 121 547
	13	NETFLIX	21 780 233 296
	14	CJ E&M	21 165 583 129
	15	GMM GRAMMY PLC.	20 889 926 969
	16	MASHA AND THE BEAR	20 042 886 519
	17	VALNET	19 797 916 556
	18	TROOM TROOM	18 149 722 668
	19	WORLD WRESTLING ENTERTAINMENT, INC.	15 937 110 076
	20	EL REINO INFANTIL	15 516 480 267

These figures show the top 20 Media & Entertainment Parent Properties on YouTube uploading content in said markets ranked by views.
Source: Tubular Labs - Level 1 Media & Entertainment Properties ranked by the total number of global views in 2020 on videos with more than 1K views uploaded by the level 1 property in that market on YouTube. The data does not include figures by sub-properties/creators uploading content in other markets.

Talent Shows Take the Crown for Entertainment

NUMBER OF TIMES IN THE TOP 20 PROGRAMMES IN 2020 ACROSS EUROPE

5x
THE MASKED SINGER

5x
I'M A CELEBRITY GET ME OUT OF HERE

4x
FARMER WANTS A WIFE

3x
THE GREAT BRITISH BAKE OFF

3x
MASTERCHEF

3x
DANCING WITH THE STARS

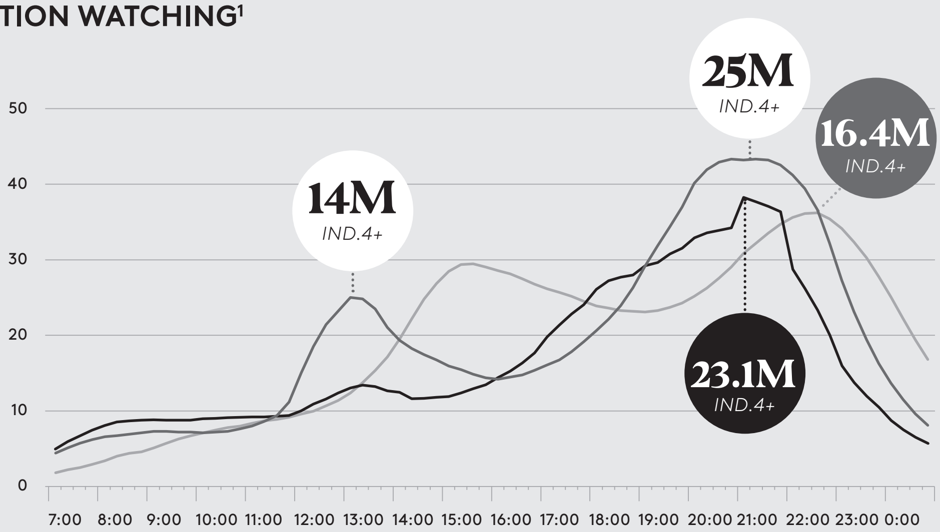
3x
YOUR FACE SOUNDS FAMILIAR

Source: Based on 21 markets: Austria, Belgium (North & South), Czech Republic, Croatia, Denmark, France, Germany, Greece, Hungary, Ireland, Italy, the Netherlands, Portugal, Russia, Spain, Sweden, Switzerland (French & German), Turkey, UK. Source: Glance, Local TV audience institutes, January-December 2020.

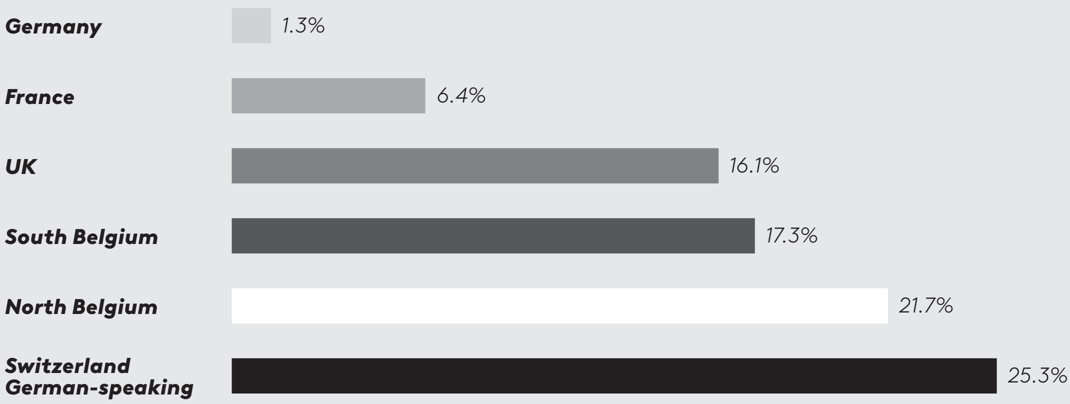
Europeans Watch Content Differently

% OF POPULATION WATCHING[1]

France has two peak times, observed at 13:15 and 21:15



SHARE OF TIME-SHIFTED VIEWING VS. TOTAL TV VIEWING[2]



TV GENRES SPLIT IN 2020[3]

News
63%
+19% vs 2019

Fiction
19%
-5% vs 2019

Entertainment
15%
-7% vs 2019

Sport
3%
-7% vs 2019

[1]Source: Local partners 2020, ratings in % on Mon-Fri, January-December 2020. [2]Share of time-shifted viewing vs total TV viewing in %. Source: Glance, local TV audience institutes, January-December 2020. [3]Based on 6 markets: UK, France, The Netherlands, Germany, Spain, South Belgium. Source: Local institutes, January-December 2020.

Top Single Programmes

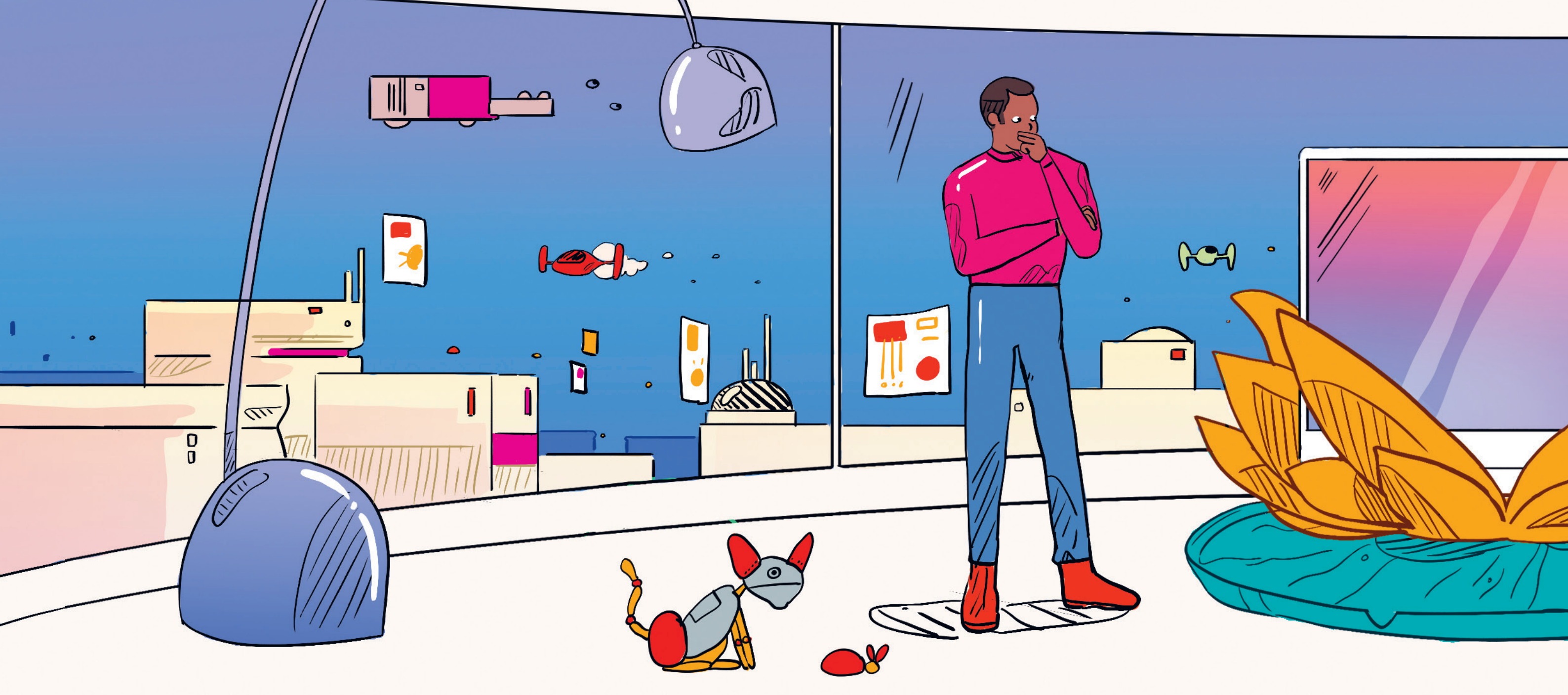
Country	Name	Channel	Genre	Rating in %	Share in %
Austria	BUNDESLAND HEUTE	ORF 2	News	28.1	62.6
Belgium North	FC DE KAMPIOENEN - KERSTSPECIAL	EEN	Comedy Series	38.9	65.5
Belgium South	ÉDITION SPÉCIALE - LE 19.30 - 17/03/2020	La Une	News	24.1	47.8
Croatia	HBAL - EU CHMP SPAIN - CROATIA	RTL	Sports	36.7	74.5
Czech Republic	O VÁNOCNÍ HVEZDE	CT1	TV Movie	34.2	63.0
Denmark	TVA EKSTRA: DRONNINGEN TALER TIL NATIONEN (QUEEN'S ADRESS TO THE NATION)	DR1	Event	38.5	61.9
France	DECLARATION DU PRESIDENT DE LA REPUBLIQUE (20 HEURES)	TF1	Politics	25.2	37.3
Germany	TATORT: ES LEBE DER KÖNIG!	ARD	Drama Series	18.3	36.5
Greece	MASTER CHEF	STAR	Reality Competition	20.6	38.9
Hungary	ALARCOS ENEKES /MAGYAR SZOR. MUSOR/ (THE MASKED SINGER)	RTL KLUB	Reality competition	16.2	30.4
Ireland	THE LATE LATE TOY SHOW	RTE One	Variety Show	39.0	77.1
Italy	70° FESTIVAL DI SANREMO	Rai 1	Event	23.4	56.6
Netherlands	JOURNAAL EXTRA - 14/12/2020	NPO1	News	37.8	61.8
Norway	MASKORAMA (THE MASKED SINGER)	NRK1	Reality Competition	27.1	73.0
Poland	SKI JUMPING - W. CUP BISCHOFSHOFEN	TVP1	Sports	14.4	32.4
Portugal	FBAL - UEFA NATION LEAGUE PORTUGAL - FRANCE	RTP1	Sports	27.3	43.7
Russia	NEW YEARS ADDRESS OF RUSSIAN PRESIDENT VLADIMIR VLADIMIROVICH PUTIN	PERVY KANAL	Event	12.7	28.1
Spain	¡FELIZ 2021!	ANTENA 3	Event	11.9	26.4
Sweden	KALLE ANKA OCH HANS VÄNNE (A WALT DISNEY CHRISMAS)	SVT 1	Animation	45.5	95.7
Switzerland (G)	TAGESSCHAU	SRF1	News	28.5	70.8
Switzerland (F)	19H30 - 15/03/2020	RTS 1	News	37.2	78.6
Switzerland (I)	TELEGIORNALE	TSI 1	News	29.4	60.9
Turkey	BIR ZAMANLAR CUKUROVA (BITTER LANDS)	ATV	Drama Series	15.6	29.7
United Kingdom	PRIME MINISTERIAL STATEMENT	BBC1	News	31.0	59.5
Japan	NHK コウハクウタガツセン (THE 71ST NKH RED AND WHITE SONG CONTEST)	NHK G	Event	29.6	55.1
United States	US. FBAL - SUPERBOWL SAN FRANCISCO - KANSAS CITY	FOX	Sports	32.9	74.2

Source: Glance, Local TV audience institutes - reproduction forbidden, all rights reserved by MEDIAMETRIE - January-December 2020.

Top Sports

Country	Name	Channel	Date	Start. time	Rating in %	Share in %
Austria	SKI - W. CUP MEN'S SLALOM SCHLADMING 2ND RUN	ORF 1	28/01	20:45	21.5	47.3
Belgium North	EDITION SPECIALE - LE 19.30	La Une	17/03	19:29	24.1	47.8
Belgium South	FBAL - UEFA NATIONS LEAGUE BELGIUM - ENGLAND	VTM	15/11	20:45	20.7	47.2
Croatia	HBAL - EU CHMP SPAIN CROATIA	RTL	26/01	16:22	36.7	74.5
Czech Republic	BIATHLON - W. CHMP WOMEN'S 12.5KM MASS START	CT Sport	23/02	12:28	9.1	30.6
Denmark	HBAL - EU CHMP/SEMIFINAL NORWAY - DENMARK	TV 2	18/12	20:50	28.6	65.9
France	FBAL - UEFA CL FINAL PARIS SAINT-GERMAIN - BAYERN MUNICH	TF1	23/08	21:00	19.8	44.4
Germany	FBAL - UEFA CL FINAL PARIS SAINT-GERMAIN - BAYERN MUNICH	ZDF	23/08	21:00	17.0	39.6
Greece	FBAL - UEFA CL QUALIFIERS - PAOK - BESIKTAS	OPEN	25/08	21:24	9.8	30.1
Hungary	FBAL - UEFA CL QUALIFIERS - FC BARCELONA - FERENCVAROSI TC	M4 Sport	20/10	20:55	8.7	20.3
Ireland	GAELIC FBAL - CHMP/FINAL DUBLIN - MAYO	RTE 2	19/12	17:00	19.9	59.6
Italy	FBAL - COPPA ITALIA/FINAL NAPOLI-JUVENTUS	Rai 1	17/06	21:04	17.4	39.3
Netherlands	FBAL - UEFA NATIONS LEAGUE NETHERLANDS - BOSNIA & HERZEGOVINA	NPO1	15/11	17:51	17.4	49.2
Norway	HBAL - EU WOMEN'S CHMP/FINAL FRANCE - NORWAY	TV 3	20/12	17:52	22.9	69.3
Poland	SKI JUMPING - W. CUP BISCHOFSHOFEN	TVP1	06/01	17:14	14.4	32.4
Portugal	FBAL - UEFA NATION LEAGUE PORTUGAL - FRANCE	RTP1	14/11	19:36	27.3	43.7
Russia	ICEHOCK - W. CHAMP U-20 2019-2020 CANADA - RUSSIA	PERVY KANAL	05/01	22:53	5.6	18.7
Spain	FBAL - UEFA NATIONS LEAGUE SPAIN - GERMANY	LA 1	17/11	20:45	10.7	27.2
Sweden	CROSS-COUNTRY - VASALOPPET 2020	SVT 1	01/03	08:00	17.4	75.2
Switzerland (G)	SKI - W. CUP MEN'S DOWNHILL WENGEN	SRF2	18/01	12:29	17.7	80.9
Switzerland (F)	FBAL - UEFA CL FINAL - PARIS SAINT-GERMAIN - FC BAYERN MUNICH	TF1	23/08	21:00	8.5	24.0
Switzerland (I)	ICEHOCK - NATIONAL LEAGUE - HC LUGANO - HC AMBRI PIOTTA	TSI 2	14/11	18:00	8.4	25.7
Turkey	FBAL - TURKISH CUP/SEMIFINAL TRABZONSPOR - FENERBAHCE	ATV	03/03	20:21	10.4	22.6
United Kingdom	FBAL - FA CUP CHELSEA - LIVERPOOL	BBC1	03/03	19:29	9.4	27.8
Japan	トウキヨウハコネ ダイガクエキデン (HAKONE EKIDEN)	NTV	03/01	07:50	16.2	59.1
United States	US. FBAL - SUPERBOWL SAN FRANCISCO - KANSAS CITY	FOX	02/02	18:41	32.9	74.2

Source: Glance, Local TV audience institutes - reproduction forbidden, all rights reserved by MEDIAMETRIE - January-December 2020.



The Renaissance of the Living Room

The living room played an ever-more important role in our lives during the pandemic as TV viewing soared. Daniel Bischoff, CMOO at RTL AdConnect, shares his view on the way in which the living room gained a new lease of life.

The living room, once a place of relaxation and household gatherings, has been totally transformed by the pandemic. Now it's become a location for work, leisure, fitness classes, child-care and home-work, a space for joy, for arguments and for sweat.

As the living room has emerged as the central hub for the activities of modern life, households have reorganised their nests. The front room has had a makeover with the addition of new sofas, desks, lamps and, of course, the latest TV sets. Lounges have been spruced up with rounds of redecorating. And Smart TVs are now to be found in seven out of ten US homes, according to a study by Hub Entertainment Research.

Understanding these changes is essential for advertisers as they seek to engage with people in their home environments. The living room has evolved into a highway for advertisers to connect with European consumers.

Above all, the living room has been a place of media consumption, whether Zoom or Teams meetings on laptops, video games on consoles, music through the new breed of Bluetooth speakers or right at the centre of the living room experience, the TV set.

New trends in media were forged in the newly-refurbished living room of 2020 and these will resonate across the advertising landscape for years to come. TV has reclaimed its central role in our communal lives.

Shared TV viewing increased by 30% during the UK's first lockdown according to data from BARB. Solo viewing also increased during this period, but at a lower rate of 13%. The trend towards greater collective viewing has brought families and friends together and established new rituals in front of the TV.

Daniel Bischoff
CMOO,
RTL AdConnect

The biggest screen in the home just got bigger. The TV has once again become the anchor for family entertainment and co-viewing. This has triggered increased spending not only on the hardware as people have bought ever-wider screen TVs, but also on content as viewers have spent more time watching streaming services.

Meanwhile, the time spent watching video in the UK increased from 4 hours 15 minutes a day before the first lockdown to 4 hours 51 minutes after, driven by increases in online video and watching subscription streaming services.

UNDERSTANDING THESE CHANGES IS ESSENTIAL FOR ADVERTISERS AS THEY SEEK TO ENGAGE WITH PEOPLE IN THEIR HOME ENVIRONMENT

During 2020, the thirst for escapism and distraction helped every form of broadcast TV – live, on-demand and playback. The average person watched 3 hours, 55 minutes of linear TV a day in Europe. But there were shifts in consumption related to the pandemic – in the UK, news watching jumped by 33% and weekday day time viewing soared by 16%.[1]

Subscription channels also grew, with time spent viewing rising by 12 minutes per person per day, a 50% rise year on year. The average person watched 36 minutes of SVOD a day.[1] →

Viewers continued to sign up to the big global streaming services to watch international content. But interestingly, these services did less well than expected. More consumers signed up for nation-based subscription services as they sought out programming with locally-produced content, whether matchmaking shows or dramas in their own languages. 6Play, the BVOD platform of Groupe M6 in France, reached 31.2 million registered users in June 2021, ITVHub in the UK attained 32.5 million and RaiPlay in Italy 19 million. On the 30th June 2021, RTL Group recorded 3.045 million paying subscribers for its streaming services RTL+ (formerly TV Now) in Germany and Videoland in the Netherlands – 72% more than in the same period last year. The viewing times of RTL+ and Videoland also increased in the first half of 2021, by 51% and 12% respectively.

A significant change in 2020 was the rise in the number of TVs connected to the internet – in the EU, this hit the 50% mark for the first time. This gives viewers a wealth of new content to watch and also opens up opportunities for advertisers to make use of more options.

In Germany, 70% of TVs were connected in 2020, while in the UK the figure was 63.2%.

There are many ways to connect a TV to the internet – through gaming consoles, dongles, set top boxes or through a smart TV with an internet connection built in. The pandemic became a learning experience for viewers as they developed their knowledge about the wide array of gadgets and connections that could plug into the TV set allowing access to digital content. Some used dongles for the first time, others started hooking up their laptops to the TV to access online content through the big screen. Their kids may have shown them how versatile their games consoles were.

Another big change that the renaissance of the living room brought could be observed in the US, where TV leap-frogged mobile devices as the screen for watching video. Mobile video viewing rose by an estimated five minutes to 62 minutes a day after the pandemic, while TV viewing rose by 22 minutes to 63 minutes a day.

NUMBER OF PAYING SUBSCRIBERS

videoland. + RTL+

3.045M

NUMBER OF REGISTERED USERS

6play **31.2M**

ITV HUB **32.5M**

RaiPlay **19M**

Source: Rai, 6play & ITVHub (average January to June 2021), AdAlliance (30 June 2021)

For advertisers, these trends have huge implications. Before the pandemic, brands thought that TV would gently decline so they put more effort into developing their strategies for mobile, digital and social media. But with the rebirth of the living room and the giant TV screen at its centre, they must review their strategies. TV today is expanding beyond the linear signal and is offering more engaging content than ever. Consumers are eager to tune in to locally produced, high quality content that relates to their cultural reality. This huge trend towards non-linear viewing on the big screen means brands need to boost their presence on catch-up channels that capture best the consumer attention.

> **BRANDS NEED TO BOOST THEIR PRESENCE ON CATCH-UP CHANNELS THAT CAPTURE BEST THE CONSUMER ATTENTION**

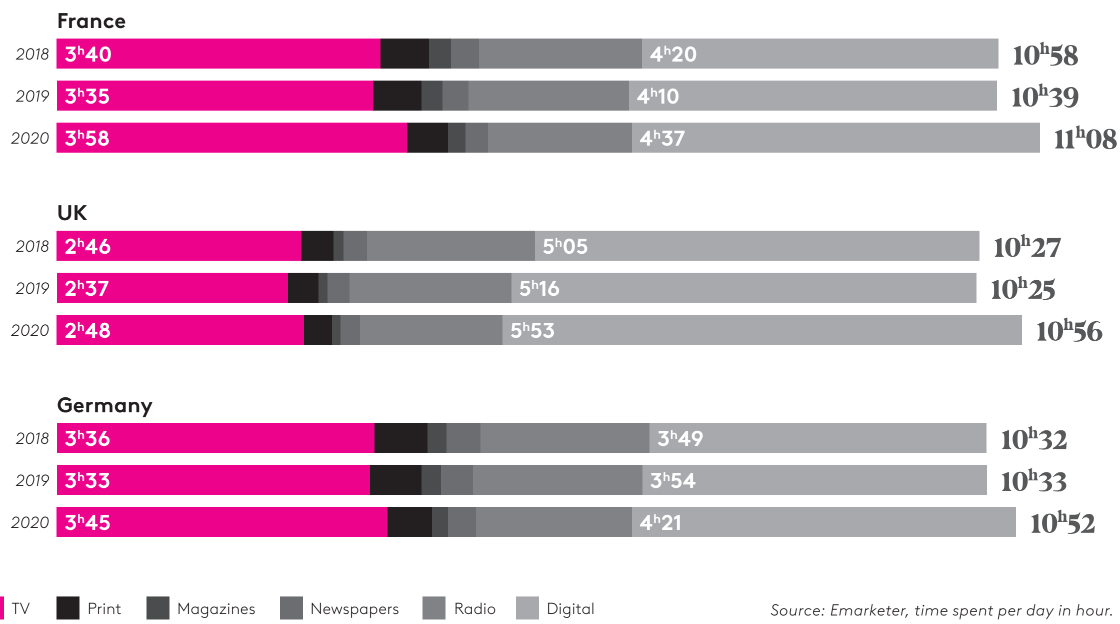
Increased connectivity of TVs has also boosted Addressable TV, allowing advertisers to target individual households through a combination of the high reach linear TV signal and a digital return path.

The big task for the years ahead is to create a measurement framework that will be able to fully grasp and show the true power of cross-screen and cross-media consumption in the living room.

The rebirth of the living room requires brands to rethink their media strategies, to restart connecting to European consumers by recapturing the media consumption in the living room.

[1]*Source: A Year in TV, Thinkbox Annual Review 2020-21.*

A 3-YEAR COMPARISON OF MEDIA CONSUMPTION



Source: Emarketer, time spent per day in hour.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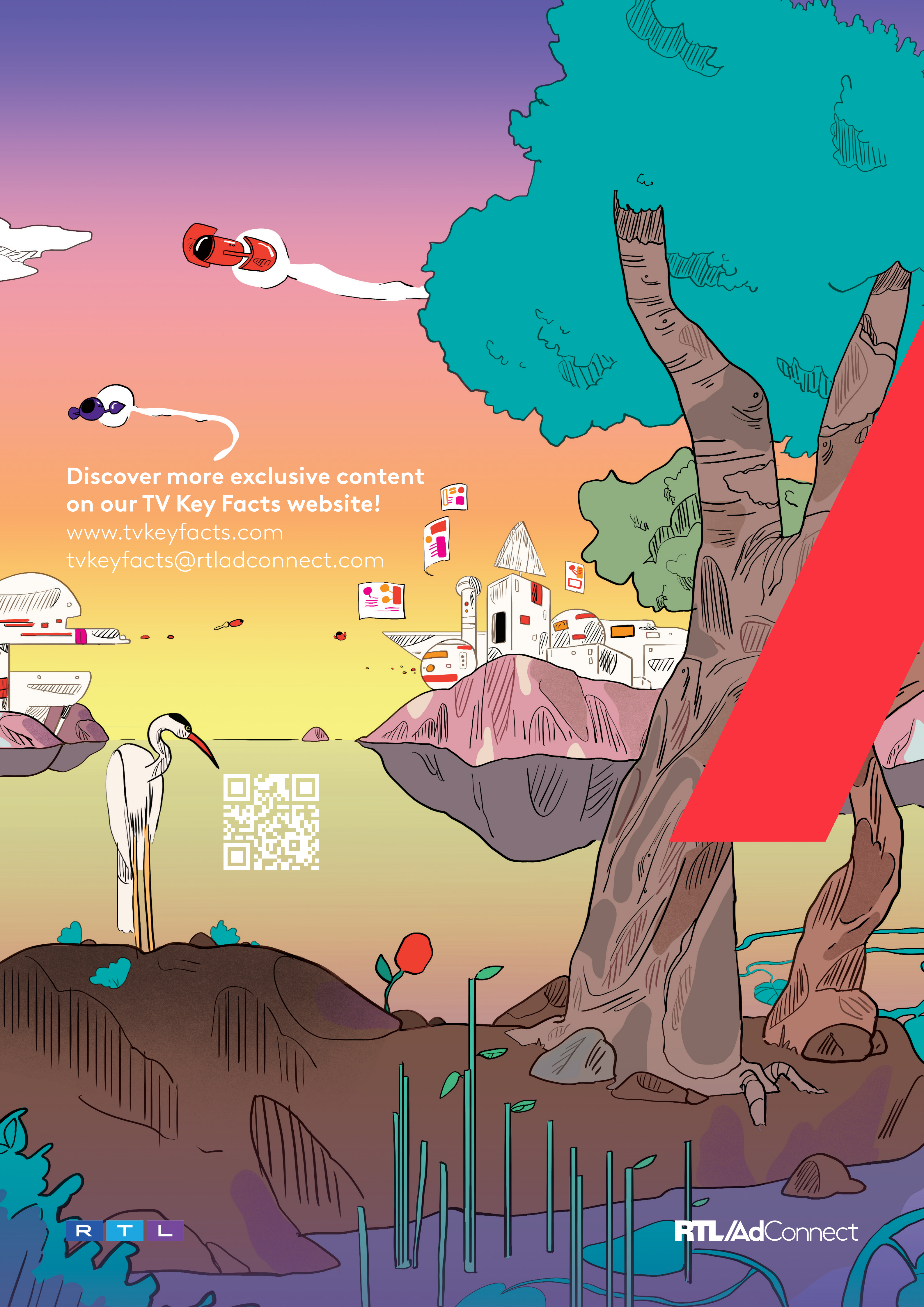

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