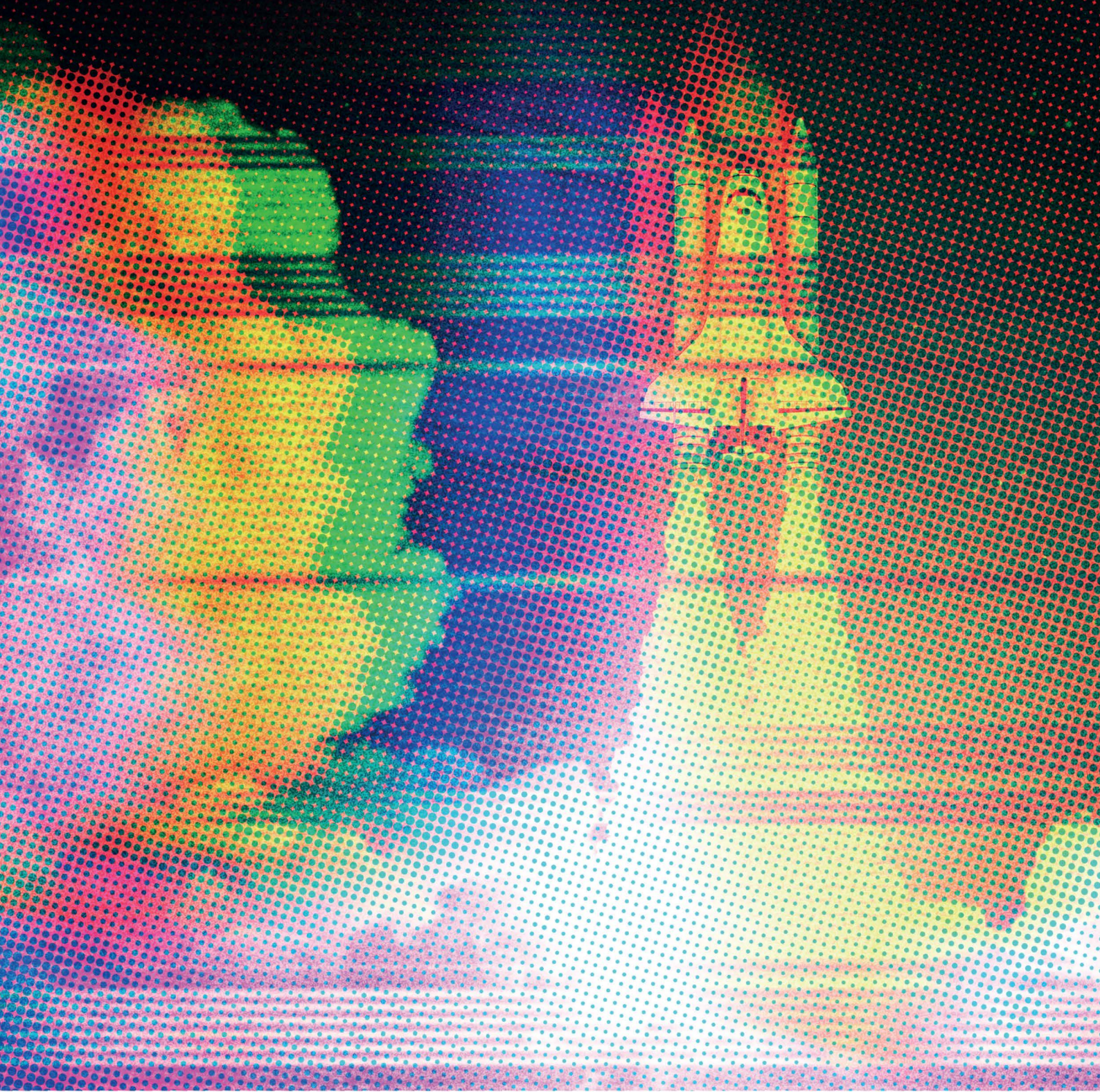


Entertaining new era

TV KeyFacts

Total Video International Trends
by RTL AdAlliance

For more information about the 2022 TV Key Facts,
contact us at: tvkeyfacts@rtladconnect.com







Stéphane Coruble
CEO
RTL AdAlliance

The potential ahead

For the first time, I'll be looking forward rather than back for this intro, even though it is quite a turbulent year. We are in a period of uncertainty, full of challenges, but we have also seen immense potential for the future of the advertising industry, all of which we will be discussing in this edition of TV Key Facts.

I am especially excited to talk more about the RTL Group merger: RTL AdConnect, smartclip and G+J i|MS united to form RTL AdAlliance.

Entering a new era

Our industry and the markets are in a period of adjustment, overshadowed by a sense of the unknown, especially when it comes to future developments. Looking at our total media world, we see a creativity crisis, macroeconomic challenges such as the war in Ukraine, a rising inflation across countries, the price of energy, raw material, the housing crisis, and environmental questions play a role as well. And we need to figure out new KPIs and measurement values, and of course define new ideas and aspirations to champion more purpose and diversity inclusion. These topics build the framework within which this new era must be defined. These are the pillars upon which the chapters of this report are based. But how can and should we navigate this unknown period? This edition of TV Key Facts is meant to shed some light and help find the way to successfully discovering the unknown. →



Everyone wants a piece of the advertising pie, which is of course a challenge for legacy broadcasters and media companies, but it also shows the opportunity and potential that lies ahead.

Video advertising has never been sexier!

I stand by that. I know it might seem illogical with everyone being worried about the industry's future. However, we see a clear trend of SVOD streaming platforms moving towards AVOD, legacy print publishers moving into video content creation, we see SME taking advantage of addressable TV, and even retail is strongly pushing their business models into media. It is safe to say that everyone wants a piece of the advertising pie, which is of course a challenge for legacy broadcaster and media companies, but it also shows the opportunity and potential that lies ahead. It is our mission now to shape this new era we are entering, to make it more efficient, find the right environments, the right partnerships, find new ways of measuring attention and to live up to expectations. Let's be visionaries!

I have been thinking a lot about perspectives. Looking at the world through different lenses ranging from macro to micro, and this idea of challenging perspectives is also reflected in our mission. Looking at advertising, on the one hand, you have the macro players, the global companies that work on an international scale. But when you zoom in closer, you can see all the SME and smaller brands that are starting to embrace the opportunities of addressable TV on a hyper local level. Thus, we are catering to the entire spectrum of advertising with an incredibly dynamic funnel.

Mission Orion

We have used the metaphor of a space mission to discover the unknown, the new era, has accompanied us not only for TV Key Facts, but also for the launch of RTL AdAlliance; the international total media sales house of RTL Group that brings simplified access to an exclusive global premium portfolio.

Each NASA or ESA mission depends upon the combined expertise of an elite team of specialists. RTL AdAlliance is no different, as our aim is to build a brand, stronger than the sum of its parts. Just as every NASA mission is made up of different individuals and teams, whose unique expertise contributes to a deeper understanding of space, so too is RTL AdAlliance a collective of teams and individuals, united in a shared endeavour.

We were inspired by the constellation "The belt of Orion", an alignment of three stars that nicely mirrors the alignment of the three companies who together become RTL AdAlliance, a perfect metaphor to give our endeavour its name and reflect our vision.

As mentioned earlier, challenging perspectives is important for RTL AdAlliance, we need to utilize these different lenses and embark on an adventurous journey to create our unique perspective. Together as a team we have the perspective and vision to provide a 360° view of today's advertising market. We can zoom in close to understand audiences, data and content in granular detail like through a microscope. On the other hand, we can zoom out to take the long, macro view, identifying prevailing trends and anticipating the future.

Joining forces

Why RTL AdAlliance? Why now? To answer this, we will have to look at the challenges of the market. The first challenge is that the market is evolving quite fast, and we see a consolidation of players within, as well as the ever-dominant presence of the global giants or GAFAM. There was this incredible ubiquity – something like 75% of every new digital dollar spent goes to the same three companies and soon we expect more than 50% of global advertising money to go to these companies. We really have an issue as a legacy broadcaster and as local players in Europe. So, we decided to take a step forward, to shape our own presence by connecting local champions via a strong international player, which is RTL AdAlliance.

The second challenge is that in recent years, and especially through the pandemic, we have seen media consumption changing and diversifying. While studies show that we are spending more time than ever in our living rooms watching the big screen, we are also often switching fluidly between formats and platforms or engaging with two screens simultaneously. It is paramount for advertisers that media planning and measurement is adapting to this new normal and these new viewing habits.

RTL AdAlliance is formed as an answer to these new market trends, as a solution for the market needs of advertisers and media companies in Europe and across the world. It is the only European sales house to offer advertisers national and international (cross-) media campaigns in one place.

The advertising industry has never been as vibrant and dynamic as today. Let's embrace this opportunity.

”

To conclude, we want to become the European champion for advertising and technology sales, and we want to pay high attention to both sides of the value chain, creating benefits for media and tech partners as well as for our advertisers. For the former, we will be a full-service provider in terms of technology, but also regarding sales, combining international with national sales and bringing incremental revenue. For our advertisers, we will be a multichannel media house, a “one stop shop” that can offer the entire range of media with which one can access all types of audiences from broad to hyper targeted audiences.

It is true, the current market environment seems doomed, heavy and full of uncertainties at this moment. It is our mission to take this challenge, change, adapt, and move into this New Era positively. The advertising industry has never been as vibrant and dynamic as today. Let's embrace this opportunity. ✕



Total video stats

A total video world

Total individuals' viewing time
January-December 2021

World

2^h36

North America

3^h05

South America

3^h36

Middle East

3^h37

Europe

3^h40

Africa

3^h33

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



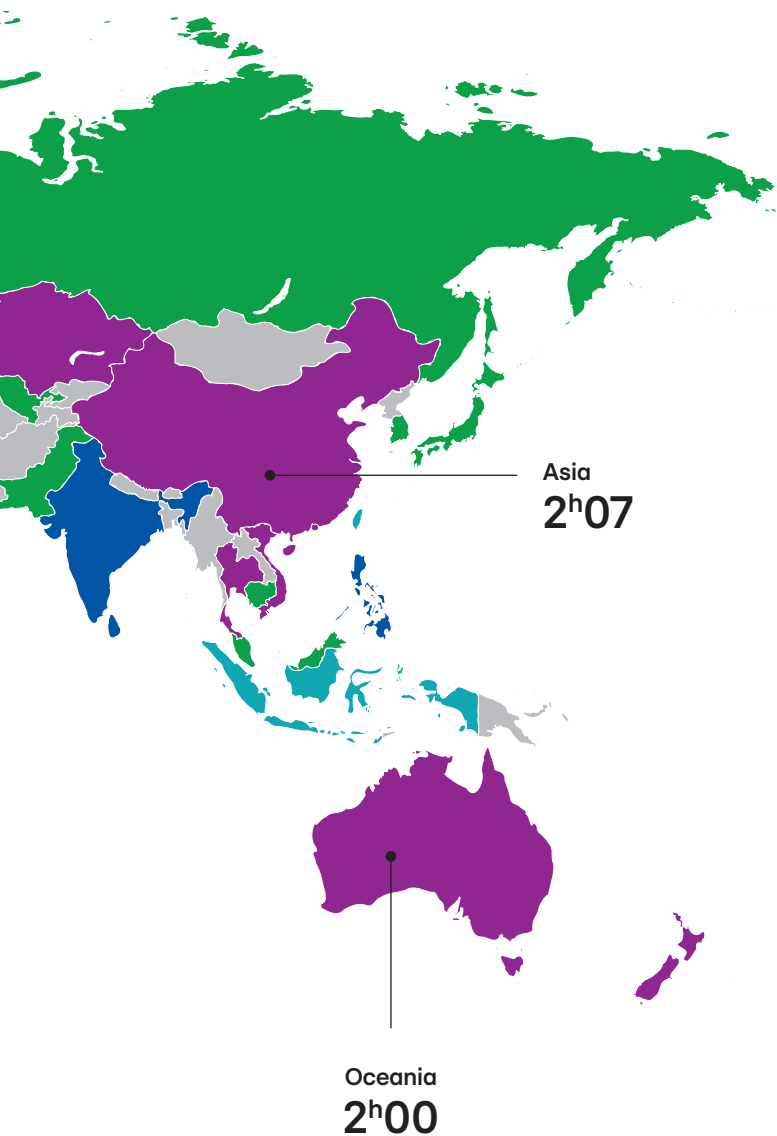
More than
30 minutes
above the
average



n.a.



Average



Worldwide TV viewing time in 2021

Universe: 4.1 billion, 86 countries

2^h36

Europe

3^h40

Universe: 691 million, 36 countries

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

Asia

2^h07

Universe: 3.9 billion, 14 countries

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

North America

3^h05

Universe: 505 million, 3 countries

Canada, Mexico, United States.

South America

3^h36

Universe: 432 million, 13 countries

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

Middle East

3^h37

Universe: 250 million, 14 countries

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

Oceania

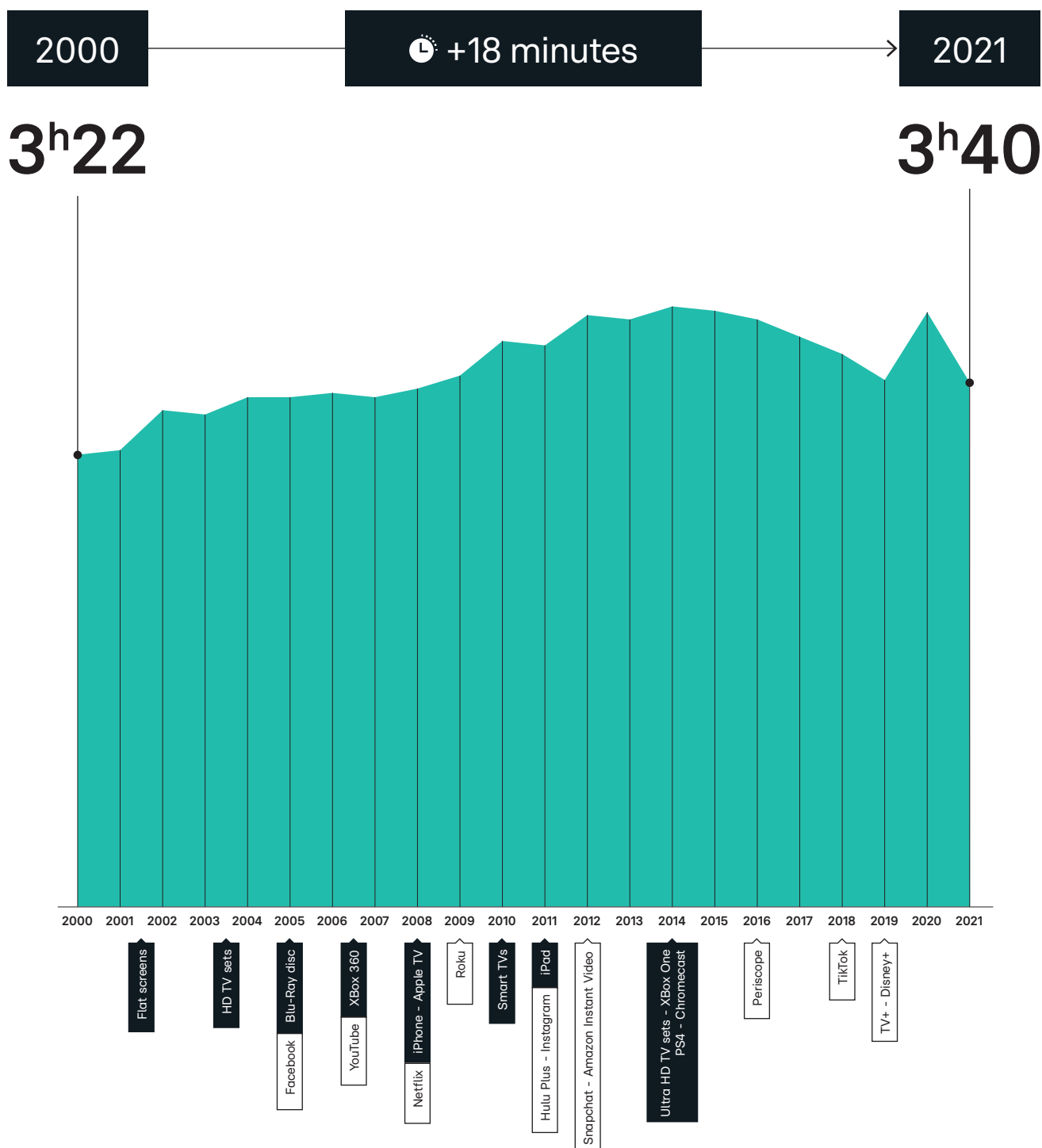
2^h00

Universe: 31 million, 2 countries

Australia (Cities & Regional), New Zealand.































Changing screen habits

Evolution of the European average Daily TV viewing time
Total Individuals 2000-2021, in minutes



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

Viewing time per individual

Country	Target Group Individuals	Viewing Time 2021 in min, Mon-Sun	Daily Reach in %, all day	Viewers during Peak Mon-Fri	Maximum Peak Mon-Fri	Universe 4+
 Austria	3+	188	66.8	3 152 100	20:45	8 295 000
 Belgium North	4+	213	74.6	2 605 800	20:30	6 060 000
 Belgium South	4+	249	72.9	1 543 150	21:15	4 409 000
 Bulgaria	4+	270	77.3	2 469 751	20:45	6 675 002
 Croatia	4+	271	64.0	1 601 835	21:15	3 869 167
 Czech Republic	4+	223	70.4	4 385 073	20:30	9 723 000
 Denmark	3+	127	53.0	1 655 157	20:30	5 649 000
 Finland	4+	163	64.6	1 843 356	20:45	5 297 000
 France	4+	219	77.2	24 201 660	21:00	57 623 000
 Germany	4+	213	67.0	30 220 400	21:00	75 551 000
 Greece	4+	303	73.4	4 762 531	22:15	10 353 328
 Hungary	4+	297	74.7	4 172 748	20:30	8 550 713
 Ireland	4+	147	62.0	1 333 500	21:00	4 445 000
 Italy	4+	249	71.5	24 301 620	21:30	57 861 000
 Luxembourg	15+	129	58.0	185 588	20:15	533 300
 Netherlands	6+	154	68.0	6 798 540	21:00	16 187 000
 Norway	2 to 79	100	49.8	1 110 340	21:00	5 047 000
 Poland	4+	270	68.0	13 469 625	21:00	35 919 000
 Portugal	4+	296	85.6	5 019 630	21:15	9 471 000
 Romania	4+	304	70.3	7 669 676	21:30	17 591 000
 Spain	4+	203	66.0	15 389 105	22:15	45 665 000
 Sweden	3+	124	53.0	2 850 570	20:45	10 002 000
 Switzerland (G)	3+	114	60.0	1 617 583	20:15	5 269 000
 Switzerland (F)	3+	132	60.0	569 435	21:15	1 867 000
 Switzerland (I)	3+	152	69.0	119 314	21:30	338 000
 Turkey	5+	248.4	64.6	24 922 709	22:00	58 367 000
 United Kingdom	4+	173	65.5	21 659 615	21:00	61 013 000
 Total Europe ¹		2 956	69.3	138 138 493		353 091 180
 United States	2+	182	n.a	74 443 720	20:45	311 480 000
 Japan	4+	256	79.3	15 052 617	20:30	40 793 000

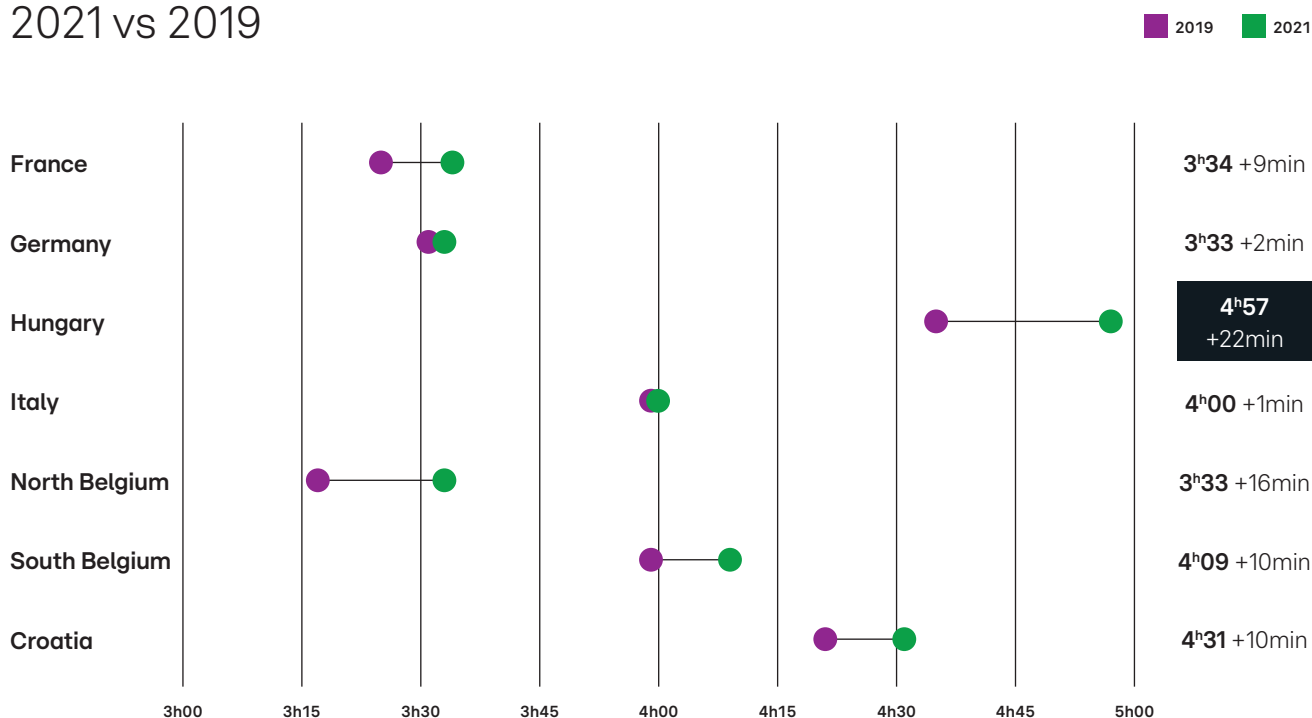
¹For 10 markets. Source: RTL AdConnect, Glance, local institutes, One Television Year in the World Edition 2022 – reproduction forbidden, all rights reserved by Mediametrie.

TV, the home of audiences

The viewing time in Europe decreased in 2021 relative to 2020, but remained stable against 2019.

While most countries in the world were seeing a significant decrease in viewing time, some countries, such as Hungary, Belgium and Croatia saw a remarkable growth in viewing time.

Viewing time¹ 2021 vs 2019

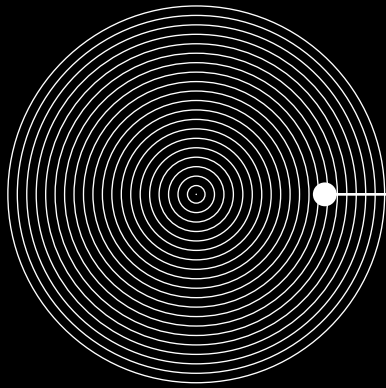


TV holds a significant place in people's daily lives² 2021 average daily viewing time



Source: ¹Glance / relevant partner - reproduction forbidden, all rights reserved by MEDIAMETRIE; ²Glance, Local TV audience institutes, January-December 2021 (Total individuals).

TV is the media for mass and fast reach



68.9%

2021 average daily
TV reach in the EU¹

Linear TV remains the fast track to mass awareness for brands with a stable reach as 7 out of 10 europeans watch it on a daily basis.

The top events of 2021²



Eurovision Song Contest

- 14 times in national tops in 2021
- Same level as before Covid-19



The Masked Singer

- Launched in 2015 in South Korea
- Leading 11 national tops in 2021



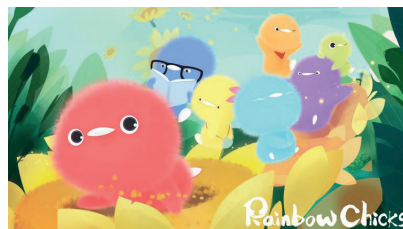
Çukurova

- Turkey is the country most represented in Fiction / Series with 38 programmes
- All the Turkish exports are series



Oprah Winfrey interview with Meghan Markle and Prince Harry

- Ranked in 7 territories
- Ranked 5 times out of the 7 territories in the top 3
- 21M+ viewers in the US
- 14M viewers in the UK



Rainbow Chicks and Boonie Bears

- The two most watched programmes in China are exceptionally short Chinese's animations
- 100% consumed in time-shifted viewing within the 7 days following their live broadcast
- *Rainbow Chicks* : 170M viewers in 7 days
- *Boonie Bears*: 145 million viewers in 7 days

Talent shows

take the crown for entertainment

Number of times in the top 10 programmes
in 2021 across Europe¹

x5

The Masked Singer



x5

Eurovision



x3

L'amour est dans le pré



x3

Wetten, Dass...?



x3

Masterchef



x3

The Great British Bake Off



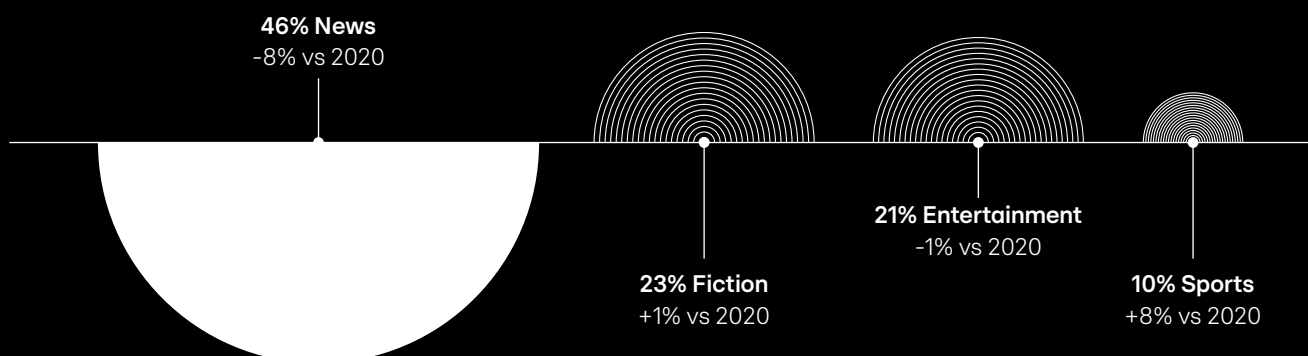
x3

Survivor



News is the leading TV genre in 2021²

After a pandemic that put news at the heart of television programming, news remains front and centre.



¹Based 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 2021.

²Based on 6 markets: United Kingdom, France, The Netherlands, Germany, Spain, South Belgium and North Belgium. Sources: Local institutes.

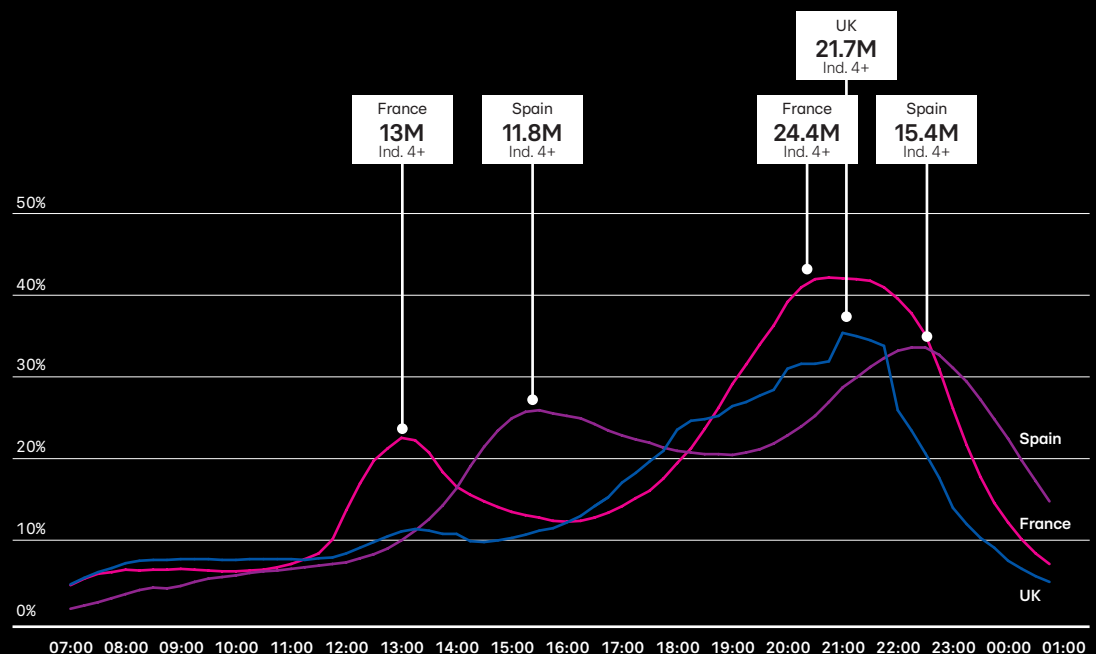
Europeans watch content differently

Television viewing is closely aligned with our local culture – when we spend time at home, when we come home from work, when we eat. All these elements influence the way in which we watch TV.

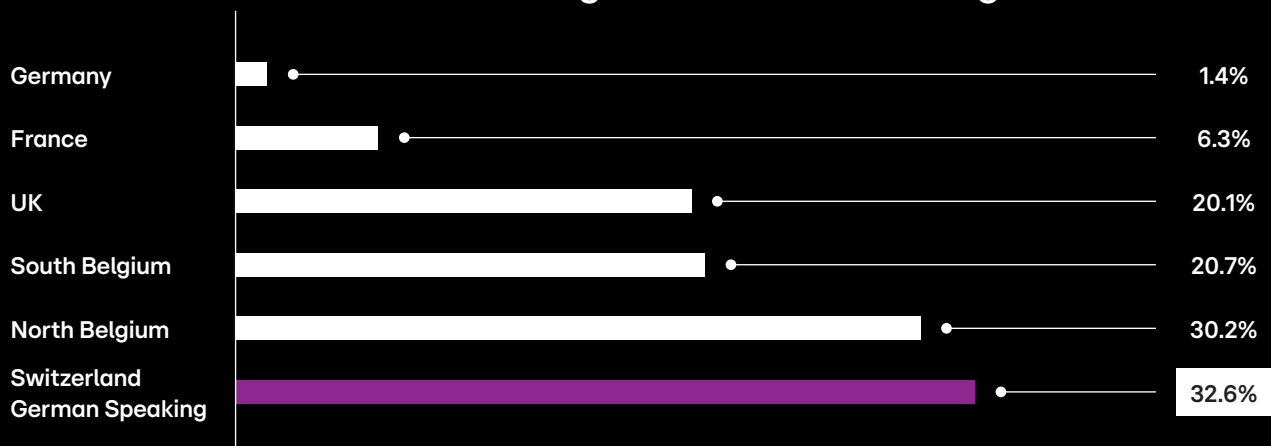
Different viewing trends around Europe¹

Percentage of population watching, 2021


























France has two peak times, **observed at 13.00 and 20.45**. Spain also has two peak times – **at 15.30 and 20.15**.




























Share of time-shifted viewing vs. Total TV viewing in %²



Top Single programmes

Country	Name	Channel	Genre	Rating <i>in %</i>	Share <i>in %</i>
 Austria	ZEIT IM BILD 1	ORF 2	News	24.6	67.8
 Belgium North	FBAL - UEFA EURO 2020 BELGIUM - PORTUGAL	La Une	Sports	35.0	79.4
 Belgium South	FBAL - UEFA EURO 2020 BELGIUM - PORTUGAL	EEN	Sports	39.4	81.7
 Croatia	NOGOMET - KVALIFIKACIJE ZA SP (DOM) - PRIJENOS	NovaTV	Sports	29.4	65.5
 Czech Republic	JAK SI NEVŽÍT PRINCEZNU	CT1	TV Movie	33.4	63.3
 Denmark	VM Handbold: Spanien - Danmark (m). semifinale	DR1	Sports	42.6	87.2
 France	FBAL - UEFA EURO 2020 - FRANCE VS SWITZERLAND	TF1	Sports	28.4	61.8
 Germany	FBAL - UEFA EURO 2020 ROUND OF 16 ENGLAND - GERMANY	ARD	Sports	36.5	76.3
 Greece	FBAL - UEFA EURO 2020 FINAL ITALY - ENGLAND	ANTENNA	Sports	20.2	57.2
 Hungary	LABDARUGO EB MERKOZES - CSOPORTMERKOZES	M4 Sport	Sports	20.3	44.4
 Ireland	THE LATE LATE TOY SHOW	RTE One	Variety Show	38.4	79.1
 Italy	FBAL - 2020 EU CHAMP ITALY - ENGLAND	Rai 1	Sports	31.1	73.2
 Netherlands	FBAL - UEFA EURO 2020 NETHERLANDS - CZECH REPUBLIC	NPO1	Sports	35.7	83.4
 Norway	EUROVISION SONG CONTEST 2021	NRK1	Event	30.6	83.5
 Poland	MISTRZOSTWA EUROPY W PILCE NOZNEJ - EURO 2020	TVP1	Sports	21.9	61.3
 Portugal	FBAL - UEFA EURO 2020 BELGIUM - PORTUGAL	TVI	Sports	40.2	69.9
 Spain	FBAL - UEFA EURO 2020 - SEMI FINAL - ITALY - SPAIN	Tele 5	Sports	26.4	67.4
 Sweden	KALLE ANKA OCH HANS VÄNNE (A WALT DISNEY CHRISTMAS)	SVT 1	Animation	37.6	95.9
 Switzerland (F)	19H30	RTS 1	News	28.4	74.3
 Switzerland (G)	FBAL - 2020 EU CHMP SWITZERLAND - TURKEY	SRF2	Sports	28.6	74.7
 Switzerland (I)	FBAL - 2020 EU CHMP FRANCE - SWITZERLAND	TSI 2	Sports	27.8	67.2
 Turkey	FBAL - 2020 EU CHAMP TURKEY - ITALY	TRT 1	Sports	14.1	36.2
 United Kingdom	FBAL - UEFA EURO 2020 FINAL ITALY - ENGLAND	BBC1	News	29.3	64.0
 Japan	オリンピックOG - Opening Ceremony	NHK G	Sports	40.0	80.1
 United States	US. FBAL - SUPERBOWL - KANSAS CITY - TAMPA BAY	CBS	Sports	30.2	79.3

Top sports

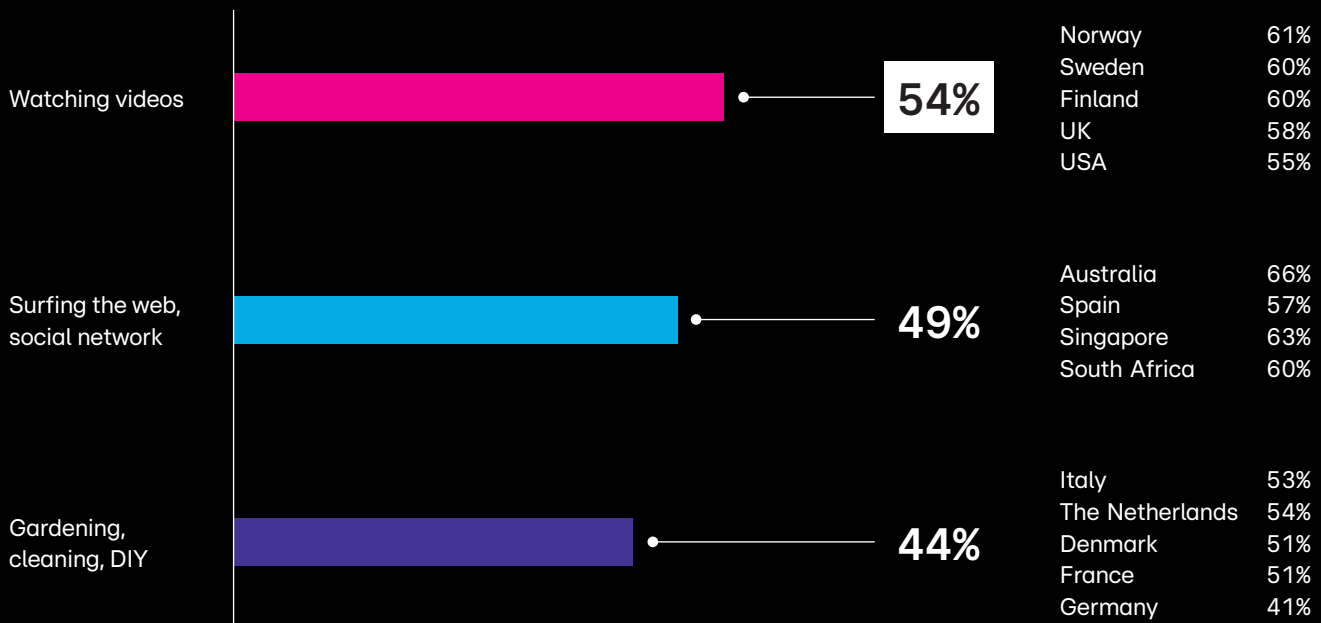
Country	Name	Channel	Date	Starting time	Ending time	Rating <i>in %</i>	Share <i>in %</i>
 Austria	FBAL - 2020 EU CHMP ITALY - AUSTRIA	ORF 1	26/06	22:19	22:51	24.1	60.7
 Belgium North	FBAL - UEFA EURO 2020 BELGIUM - PORTUGAL	La Une	27/06	21:00	22:54	35.0	79.4
 Belgium South	FBAL - UEFA EURO 2020 BELGIUM - PORTUGAL	EEN	27/06	21:00	22:54	39.4	81.7
 Croatia	FBAL - W. CUP QUALIFICATION - CROATIA vs. RUSSIA	NovaTV	14/11	14:52	17:04	29.4	65.5
 Czech Republic	ICEHOCK - 2021 IIHF WORLD CHAMPIONSHIP FINLAND - CZECH REPUBLIC	CT Sport	03/06	19:11	21:41	16.8	36.7
 Denmark	HBALL - MEN'S WORLD CHAMPIONSHIP 2021 - SEMI FINAL - SPAIN - DENMARK	DR1	29/01	20:25	22:00	42.6	87.2
 France	FBAL - UEFA EURO 2020 - FRANCE VS SWITZERLAND	TF1	28/06	21:00	23:45	28.4	61.8
 Germany	FBAL - UEFA EURO 2020 ROUND OF 16 ENGLAND - GERMANY	ZDF	29/06	17:59	19:51	36.5	76.3
 Greece	FBAL - UEFA EURO 2020 FINAL ITALIA - ENGLAND	ANTENNA	11/07	21:58	00:56	20.2	57.2
 Hungary	FBAL - EU CHMP - UEFA EURO 2020 - GERMANY vs. HUNGARY	M4 SPORT	23/06	20:58	23:00	20.3	44.4
 Ireland	GAELIC FBAL - ALL IRELAND SENIOR FOOTBALL CHAMPIONSHIPS FINAL - TYRONE - MAYO	RTE 2	11/09	17:03	18:47	21.2	74.5
 Italy	FBAL - 2020 EU CHAMP ITALY - ENGLAND	Rai 1	11/07	21:00	23:53	31.3	73.2
 Netherlands	FBAL - UEFA EURO 2020 NETHERLANDS - CZECH REPUBLIC	NPO1	27/06	17:52	20:00	35.7	83.4
 Norway	FBAL - 2020 EU CHAMP ITALY - ENGLAND	NRK1	11/07	20:53	00:19	28.9	89.3
 Poland	FBAL - EU CHMP - UEFA EURO 2020 - SWEDEN-POLAND	TVP1	23/06	17:51	19:56	21.9	61.3
 Portugal	FBAL - UEFA EURO 2020 BELGIUM - PORTUGAL	TVI	27/06	19:48	21:56	40.2	69.9
 Spain	FBAL - UEFA EURO 2020 - SEMI FINAL - ITALY - SPAIN	Tele 5	06/07	21:00	23:40	26.4	67.4
 Sweden	FBAL - UEFA EURO 2020 SPAIN - SWEDEN	SVT 1	14/06	20:55	22:59	27.4	78.2
 Switzerland (F)	FBAL - 2020 EU CHMP FRANCE - SWITZERLAND	RTS2	28/06	21:00	23:44	27.9	69.5
 Switzerland (G)	FBAL - 2020 EU CHMP SWITZERLAND - TURKEY	SRF2	20/06	18:00	19:51	28.6	74.7
 Switzerland (I)	FBAL - 2020 EU CHMP FRANCE - SWITZERLAND	TSI 2	28/06	21:00	23:44	27.8	67.2
 Turkey	FBAL - 2020 EU CHAMP TURKEY - ITALY	TRT 1	11/06	21:34	00:04	14.1	36.2
 United Kingdom	FBAL - UEFA EURO 2020 FINAL ITALY - ENGLAND	BBC1	11/07	18:20	23:41	29.3	64.0
 Japan	オリンピックOG - DAY 18	NHK G	07/08	20:34	22:05	23.5	53.0
 United States	US. FBAL - SUPERBOWL - KANSAS CITY - TAMPA BAY	CBS	07/02	18:38	22:17	30.2	79.3

The new life of the living room

Changing routines in our everyday lives and the development of new technologies has led to increased usage of the big screen in our living room. To provide strong insights into the advertising market, RTL AdAlliance got closer to consumers in a series of 18 qualitative interviews and 12 800 questionnaires across 14 territories to identify their new video habits.

Watching video is at the core of our home activity

Among the following activities, what are the three main activities you do the most at home?
Top 3, Europe (10 countries)




Sources: CSA for RTL AdConnect & Smartclip – field from 1st to 15th February 2022 for Europe and 21st April to 3rd May 2022 for the USA – Individuals 18-64 representative of each country in terms of gender, age, employment status and location. 10 countries: UK, France, Germany, Italy, Spain, The Netherlands, Denmark, Finland, Norway, Sweden. 1,000 respondents in the main markets and 700 respondents in the NL & Nordics.


We can't imagine the living room without TV

TV is everywhere, but not as it used to be – people are renewing their TVs more frequently, providing the vast majority of viewers with advanced connectivity features for consuming content or unlocking more targeted advertising options.

→ **71%**
of Europeans own a Smart TV set

 **80%** in the US

→ **55%**
purchased a Smart TV in the last 2 years

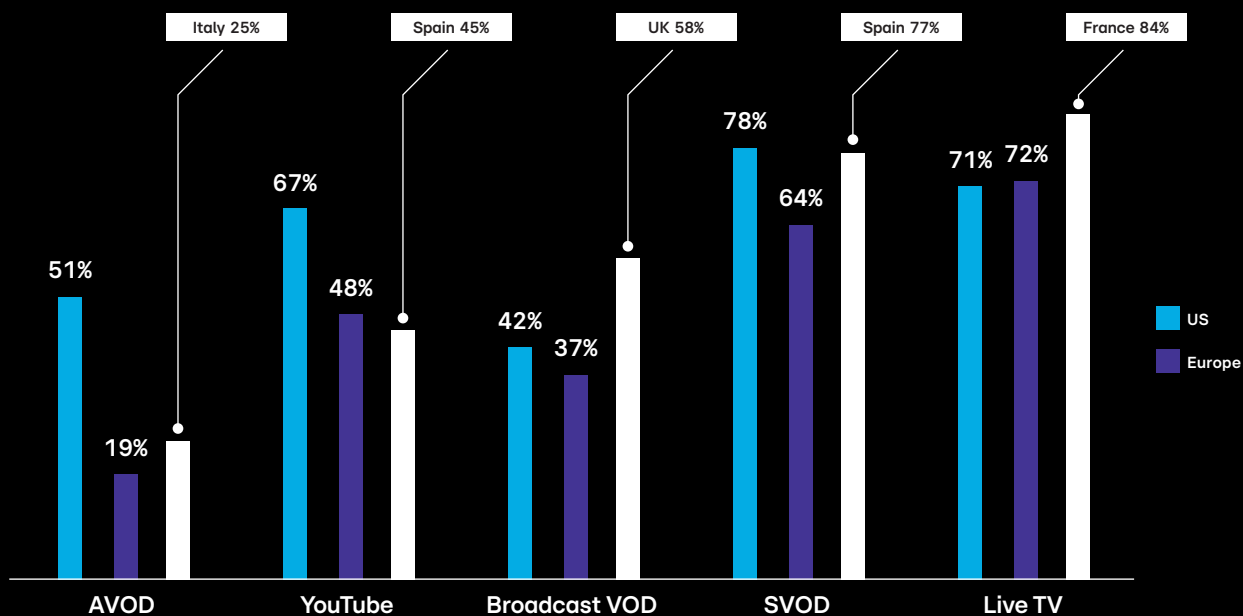
 **48%** in less than a year in the US

The new life of the living room

Connected TV viewing is high, but distributed across multiple platforms. While Linear viewing is still king in Europe, Video on Demand platforms are also highly consumed especially in the US. Local specificities apply to video consumption as different countries will be keener to use different platforms.

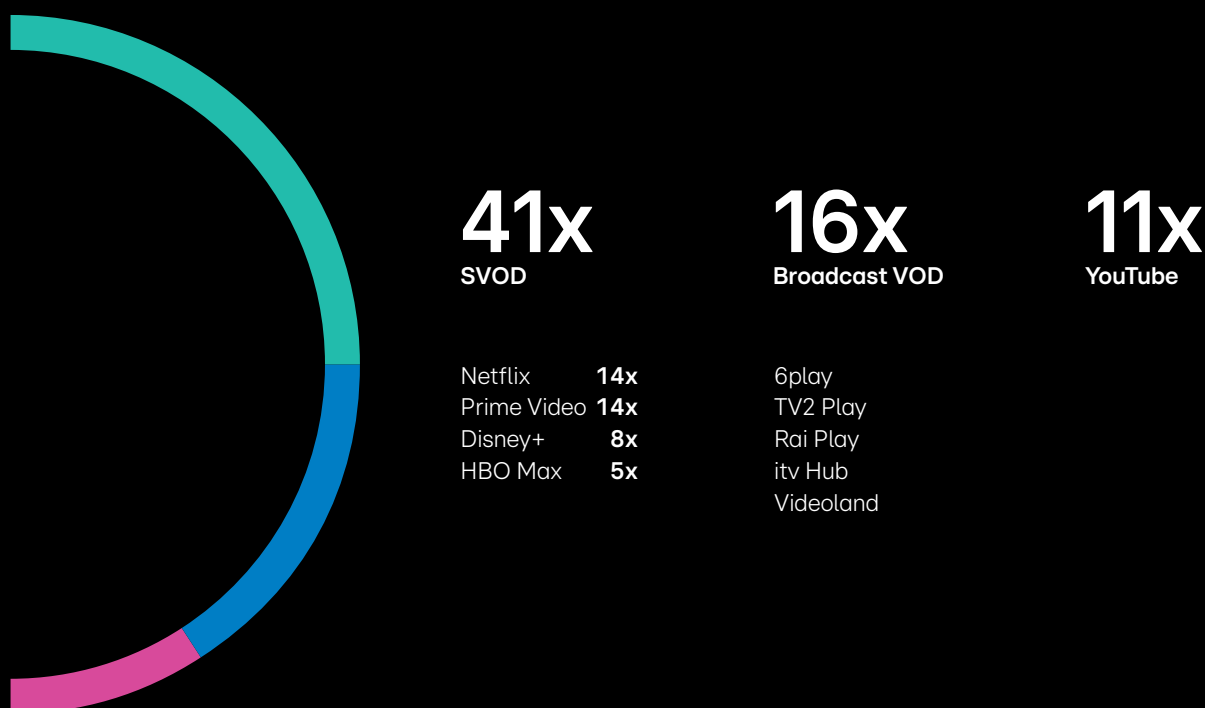
Connected TV is one screen but a lot of different platforms

Which platforms do you use weekly to watch video content (series, films, sports, TV programmes...) on your TV / Smart TV / Connected TV?



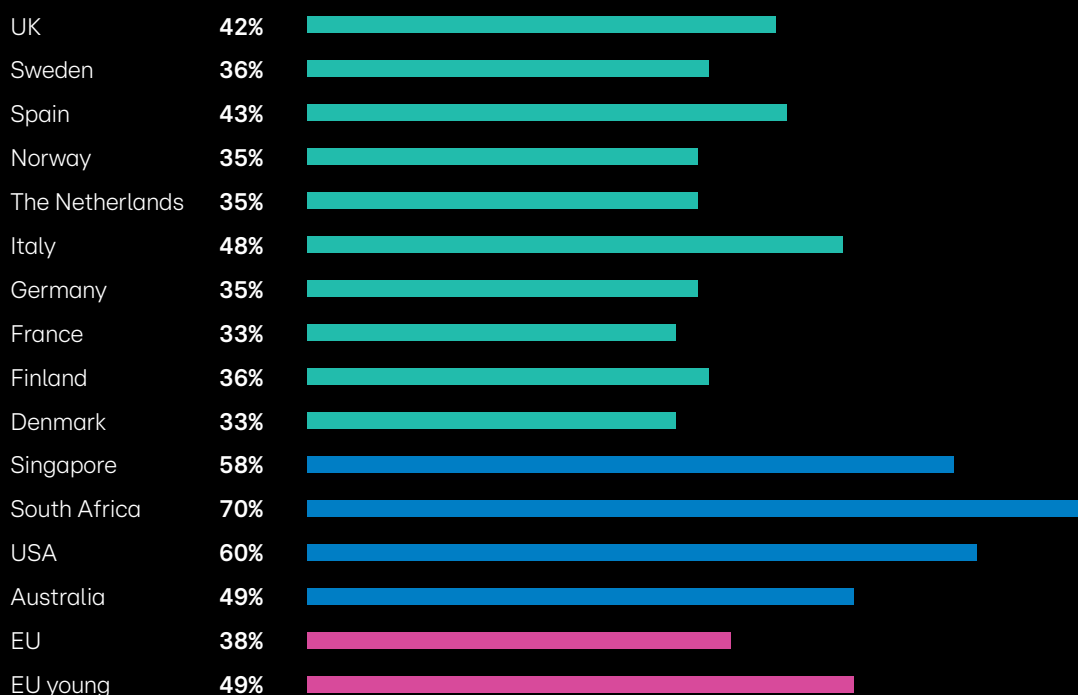
¹Basis: own a TV set, multiple answers possible. Sources: CSA for RTL AdConnect & Smartclip – field from 1st to 15th February 2022 for Europe and 21st April to 3rd May 2022 for the USA – Individuals 18-64 representative of each country in terms of gender, age, employment status and location. 10 countries: UK, France, Germany, Italy, Spain, The Netherlands, Denmark, Finland, Norway, Sweden, South Africa, Singapore, USA, Australia. 1,000 respondents in the main markets and 700 respondents in the NL & Nordics.

Streaming platforms appearing in European Top 5 across 10 countries









Favourable attitudes towards targeted ads on the TV screen by country and age


































Yes, I would be interested in receiving on my TV targeted advertising that suits more my interests.



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	8 913	4 014	95	3 823	9	54
 Belarus	9 414	4 009	96	3 868	53	0
 Belgium	11 847	5 015	95	4 744	36	51
 Bulgaria	6 873	2 905	96	2 788	16	0
 Croatia	68 084	1 539	96	1 477	35	26
 Cyprus	1 295	334	97	323	44	58
 Czech Republic	10 705	4 463	95	4 251	12	50
 Denmark	5 921	2 721	95	2 574	16	50
 Estonia	1 212	609	95	576	38	0
 Finland	5 602	2 715	94	2 550	15	46
 France	68 305	30 082	92	27 666	59	65
 Germany	84 317	41 969	88	36 880	9	66
 Greece	10 534	4 040	96	3 874	9	32
 Hungary	9 700	4 286	95	4 082	28	41
 Ireland	5 275	1 892	95	1 789	5	44
 Italy	61 096	26 436	93	24 660	1	47
 Latvia	1 842	795	93	742	32	0
 Lithuania	142 320	1 384	93	1 291	23	0
 Luxembourg	650	273	94	256	29	0
 Netherlands	17 401	7 952	95	7 522	30	45
 North Macedonia	2 130	569	97	550	26	0
 Norway	5 554	2 479	87	2 161	45	65
 Poland	38 093	14 552	91	13 288	8	51
 Portugal	10 242	4 216	95	4 016	56	33
 Romania	18 520	7 405	96	7 102	2	0
 Russia	142 022	61 198	96	58 647	17	38
 Serbia	6 739	2 457	97	2 394	28	0
 Slovakia	5 431	1 977	93	1 844	22	49
 Slovenia	2 101	851	95	805	46	36
 Spain	47 163	18 753	96	17 985	26	52
 Sweden	10 484	4 718	86	4 053	34	52
 Switzerland	8 509	3 829	93	3 559	49	63
 Turkey	83 048	25 223	99	24 916	7	34
 Ukraine	43 528	16 535	93	15 370	1	0
 United Kingdom	67 791	27 763	93	25 715	8	80
 EU Total	406 613	179 592	92	165 042	22	55
 Australia	26 141	10 056	94	9 484	8	55
 Brazil	217 924	68 672	97	66 681	2	70
 Canada	38 233	14 760	99	14 613	27	83
 China	1 410 540	495 349	96	477 592	38	45
 India	1 389 637	298 431	66	197 222	0	12
 Japan	124 215	55 520	94	52 358	8	29
 United States	337 342	128 654	97	125 052	5	138

Source: OMDIA.

Country	Smartphones penetration in %	PC penetration in %	Tablet penetration in %	Broadband household penetration in %	Mobile data subscriptions per household in %
 Austria	141	162	30	57	398
 Belarus	0	0	0	72	303
 Belgium	115	170	31	77	360
 Bulgaria	0	0	0	63	353
 Croatia	117	102	4	57	340
 Cyprus	0	0	0	87	631
 Czech Republic	111	105	21	55	368
 Denmark	187	175	53	83	365
 Estonia	0	0	0	60	380
 Finland	83	170	59	60	413
 France	111	172	38	93	320
 Germany	119	179	38	81	359
 Greece	100	186	8	88	369
 Hungary	0	103	4	67	290
 Ireland	84	160	30	66	403
 Italy	105	156	14	58	354
 Latvia	0	0	0	54	384
 Lithuania	0	0	0	47	342
 Luxembourg	0	0	0	76	350
 Netherlands	100	186	39	85	401
 North Macedonia	0	0	0	73	406
 Norway	106	184	28	87	363
 Poland	102	89	24	55	389
 Portugal	81	189	16	85	434
 Romania	0	0	0	70	387
 Russia	94	88	12	57	411
 Serbia	0	0	0	62	346
 Slovakia	77	100	19	75	410
 Slovenia	88	106	18	66	289
 Spain	100	174	18	69	339
 Sweden	141	183	38	81	395
 Switzerland	161	187	22	92	277
 Turkey	115	77	16	71	330
 Ukraine	0	0	0	34	334
 United Kingdom	128	207	57	84	350
 EU Total	114	140	30	83	386
 Australia	85	76	28	83	348
 Brazil	67	67	8	51	365
 Canada	162	397	86	100	289
 China	97	77	10	89	615
 India	58	28	2	7	373
 Japan	106	192	32	69	357
 United States	133	413	47	84	436

Source: OMDIA.

Top advertising sectors and advertisers

2021 saw a significant rebound in ad expenditures across Europe.

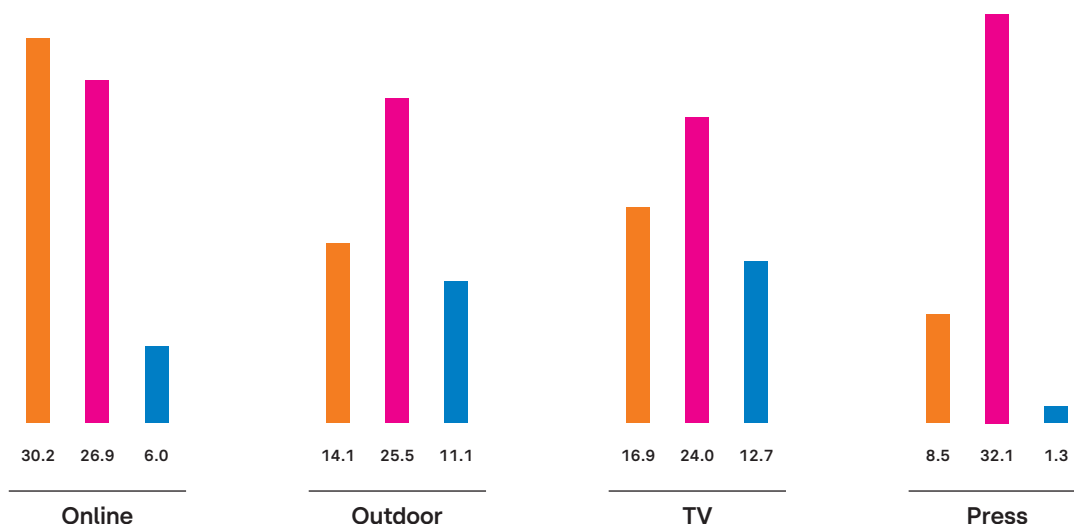
Spends in all media types were in high double digit growth in 2021 across Europe as the result of a restart of the advertising market after a Covid-troubled 2020. Highly affected media such as Outdoor showed signs of strong recovery while TV and Digital showed strong growth despite their 2020 resilience.

107m+
TV spots were broadcast
in Europe in 2021¹

Adspend's evolution 2021 vs 2020 (%)²

2021 saw a significant rebound in ad spending across Europe

France UK Germany



TV share of media expenditure and Top 3 advertising sectors¹

Country	TV Share of Media Expenditure	Trend	1	2	3
Austria	33.1%	↑	Services	Retail	Home and Garden
Belgium	45.0%	↑	Culture and Leisure	Retail	Food
Croatia	82.1%	↑	Retail	Food	Cosmetics
France	50.0%	↑	Retail	Services	Food
Germany	50.4%	↑	Cosmetics	Services	Media
Hungary	91.6%	↑	Cosmetics	Retail	Food
Italy	68.4%	↑	Food	Retail	Cosmetics
Luxembourg	9.9%	↑	Services	Retail	Culture and Leisure
Netherlands	58.9%	=	Retail	Food	Services
Spain	32.6%	↓	Services	Retail	Food
Switzerland	28.6%	↓	Retail	Food	Cosmetics
United Kingdom	27.5%	=	Culture and Leisure	Services	Food
Europe	45.9%	=	Services	Food/Cosmetics (very close)	Retail
United States	49.0%	n.a.	Insurance	Automotive	Food

Top 3 advertisers²

Country	1	2	3
Austria	XXXLutz	Spar Österreichische Warenhandels-AG	P&G
Belgium	P&G	Ahold Delhaize	Colruyt Group
Croatia	Lidl	Kaufland	Konsum Plus D.O.O.
France	Lidl	P&G	Renault Automobiles
Germany	P&G	Ferrero	Amazon DE, MUC
Hungary	Sanofi-Aventis	Ferrero	Glaxo-Smithkline
Italy	Ferrero	P&G	Stellantis Gruppo
Luxembourg	Post Luxembourg	Coca Cola	BMW
Netherlands	Ahold	DPC	P&G
Spain	L'Oréal	P&G	El Corte Ingles
Switzerland	Coop-Gruppe Genossenschaft	Migros Genossenschafts-Bund	P&G
United Kingdom	P&G	Sky UK Ltd	Unilever UK Ltd
Europe	P&G	Ferrero	Amazon
United States	GEICO	T-Mobile	Casualty

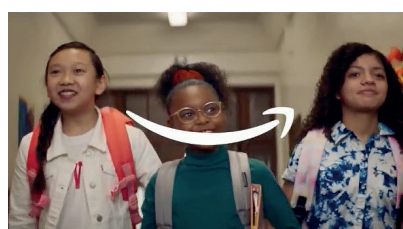
Biggest TV adspenders in 2021

#1 Procter&Gamble



P&G

#2 Amazon



amazon

#3 Ferrero



FERRERO

¹Top 3 advertising sectors ranked by total advertising expenditure. Category services includes finance; category retail includes retail, distribution, trade and delivery; category culture and leisure also includes tourism for gastronomic reasons; category cosmetics includes pharma; ²Top 3 advertisers ranked by total advertising expenditure. Sources: Local institutes, January-December 2021, for 12 main European markets.

Digital advertising

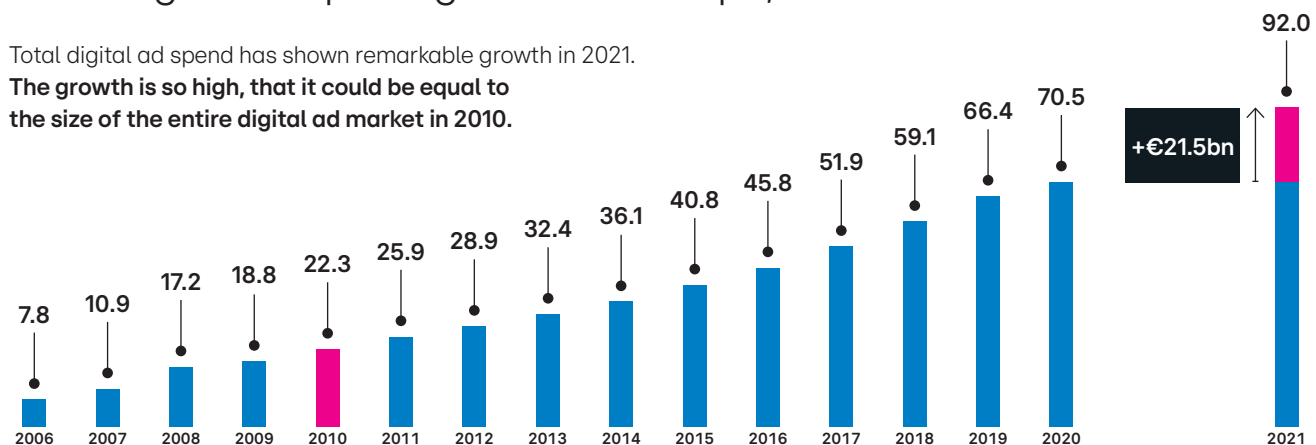
In an era where all advertising and marketing are becoming digital, it is important to take a closer look at what makes up digital advertising numbers. Formats as different as video, banners, paid social or search have different weight and growth rate in the digital advertising ecosystem.

2021 added nearly the entire volume of the 2010 digital ad market

Total digital adspend growth in Europe, 2006-2021 in €bn

Total digital ad spend has shown remarkable growth in 2021.

The growth is so high, that it could be equal to the size of the entire digital ad market in 2010.

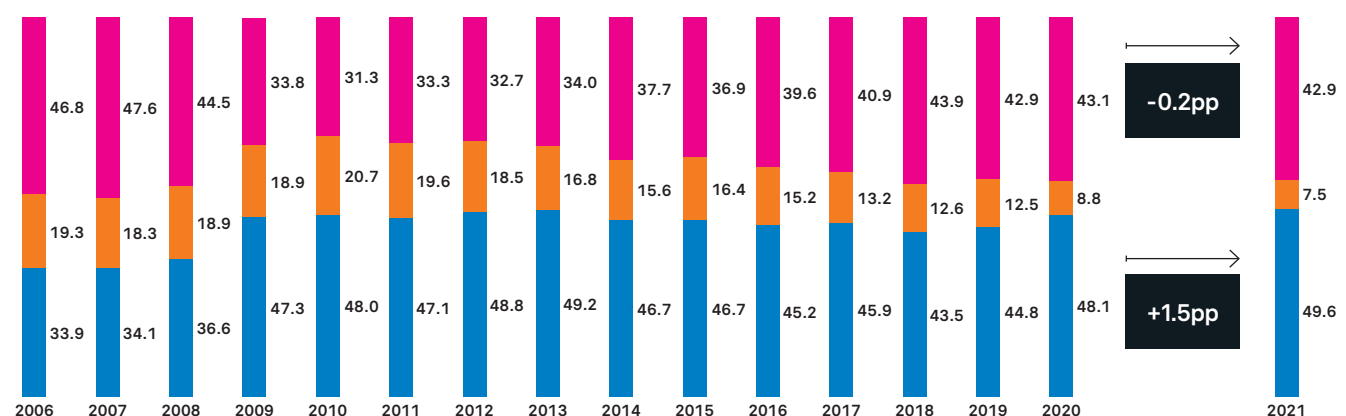


Display formats continued share gain after 2020 surge

Digital ad spend split by format in Europe, 2011-2021 in %

Looking at the digital ad spend split by format, it becomes clearer that search has kept its strong position, while **display is gaining more and more popularity**.

■ Display ■ Classified, directories and affiliate ■ Search



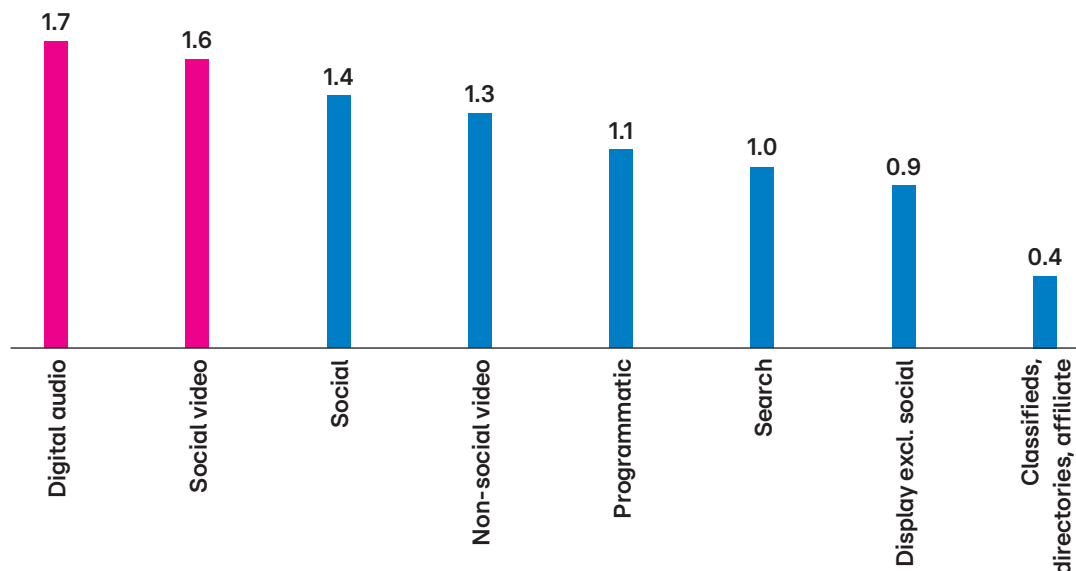
Digital video represents around 20% of European adspend and is experiencing faster growth than the average. However, the European digital video advertising market is highly concentrated within four countries: the UK, France, Germany and Italy.

Audio and social video are ahead of other formats¹

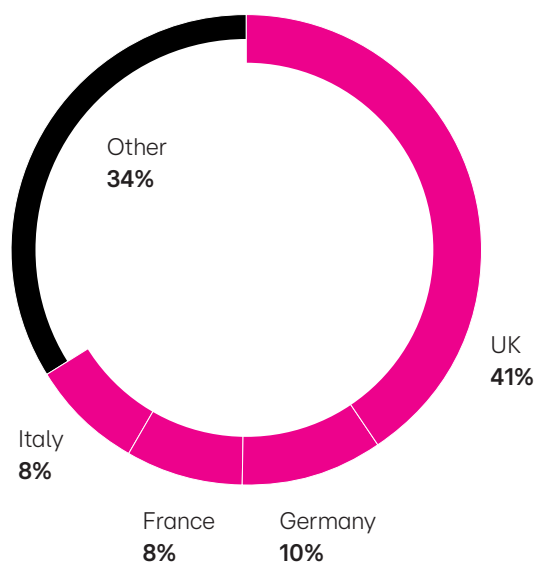
2021 adspend growth index

The adspend growth index is used as a factor to show the fastest growing format.

In 2021 such two formats were digital audio and social video.



Share of video market by country in 2021 in €m²



In 2021, video advertising reached
€18.5bn²

2/3 of digital video adspend is generated by four markets

Special thanks

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