



## **MARKET OVERVIEW**

June 2017

# THE BIG PICTURE

## RTL GROUP – Traditional TV Business Footprint



- European-based
- Linear
- 10+ countries
- 50+ channels
- Daily watch time per person per country ~ 3hrs

# THE BIG PICTURE

## RTL GROUP – Digital Video Footprint



- Global
- Non linear
- 1.000 + channels
- > 10 billion views per month
- Avg watch time per video: < 5 min

# RTL IN CROATIA

## CHANNEL POSITIONING



**RTL**  
HRVATSKA



CHANNEL



POSITION

<p>General interest channel TG 7-77 with focus on core viewers (25-40) Entertainment, local fiction, news „Local“ Prime time Stable scheduling</p>	<p>Second generation channel TG 15-49 US crime series, sitcoms and now also factual Target: #1 secondary channel</p>	<p>Children channel TG 4-12 Kids and family programming New prime time targeting family with focus retro viewers (Men 30-40)</p>
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PAY TV



ONLINE / VoD

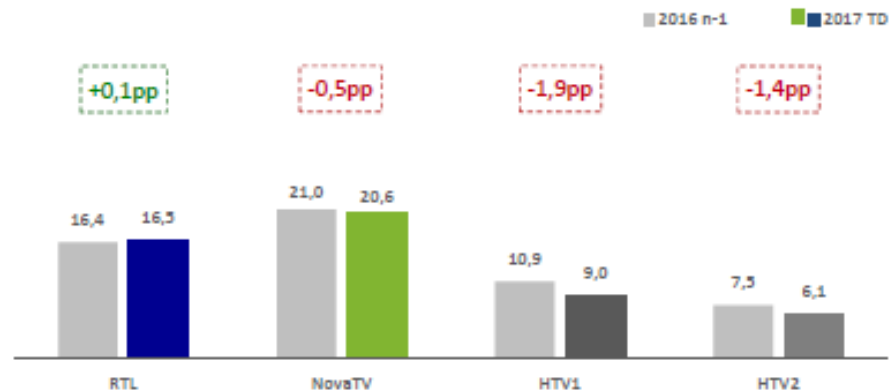


# PROGRAM

## HISTORICAL, ALL DAY, YTD 2017

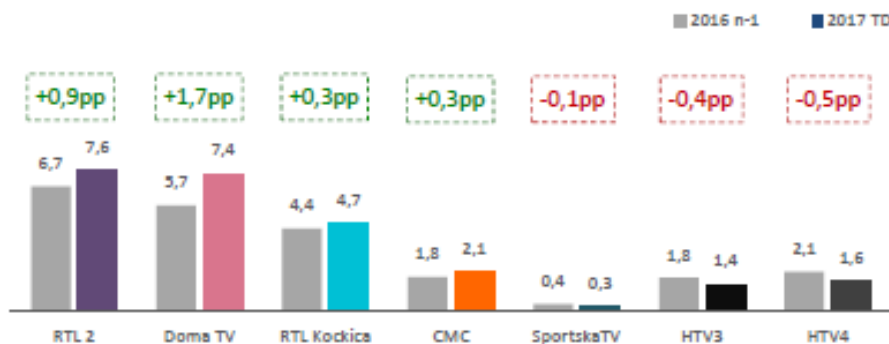
### AUDIENCE MARKET – MAIN CHANNEL VIEW

Target 18-49, all day, in %



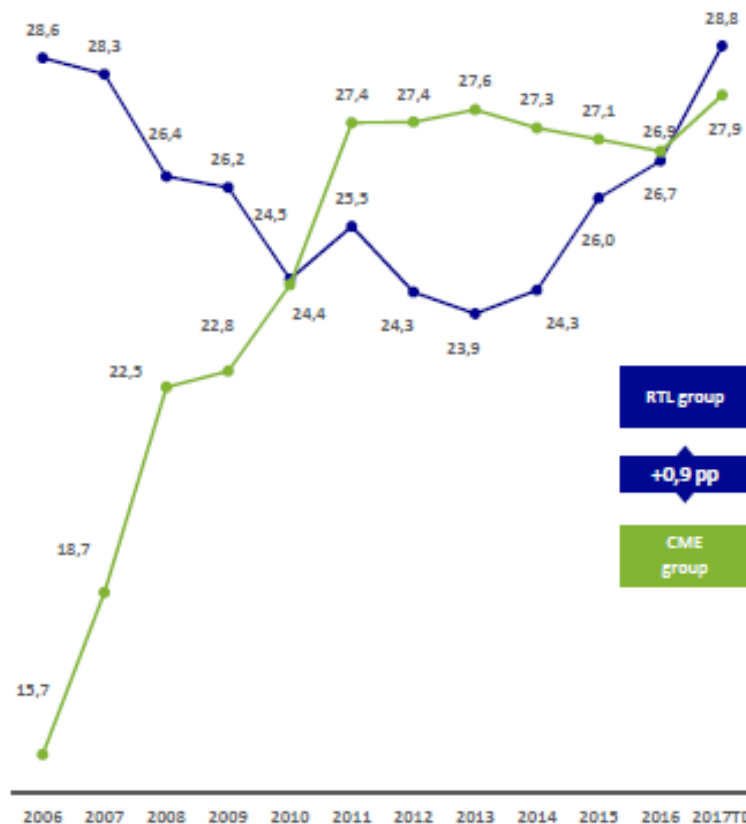
### AUDIENCE MARKET – SMALL CHANNEL VIEW

In %



### AUDIENCE MARKET – GROUP VIEW

Target 18-49, all day, in %

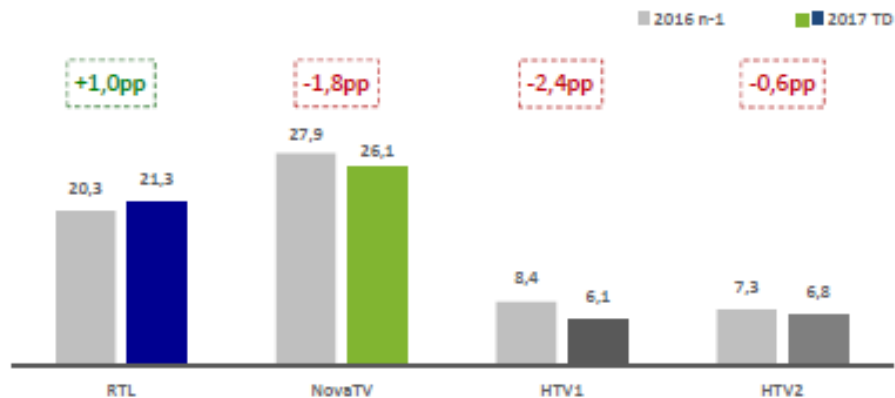


# PROGRAM

## HISTORICAL, PRIME TIME, YTD 2017

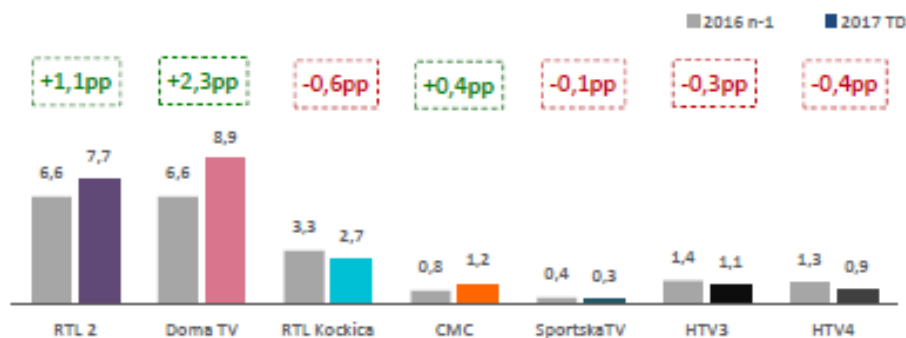
### AUDIENCE MARKET – MAIN CHANNEL VIEW

Target 18-49, prime time, in %



### AUDIENCE MARKET – SMALL CHANNEL VIEW

In %



### AUDIENCE MARKET – GROUP VIEW

Target 18-49, prime time, in %



# PROGRAM HIGHLIGHTS

## SPORT

- World Championship - France 2017
- 18 matches
- **AMR 13,1%, SHR 40,5%**



## ENTERATNMENT

- Season 1
- 60 episodes
- **AMR 6,4%, SHR 21%**



## ENTERTAINMENT

- Season 1
- 26 episodes
- **AMR 6,8%, SHR 22,8%**



## NEWS

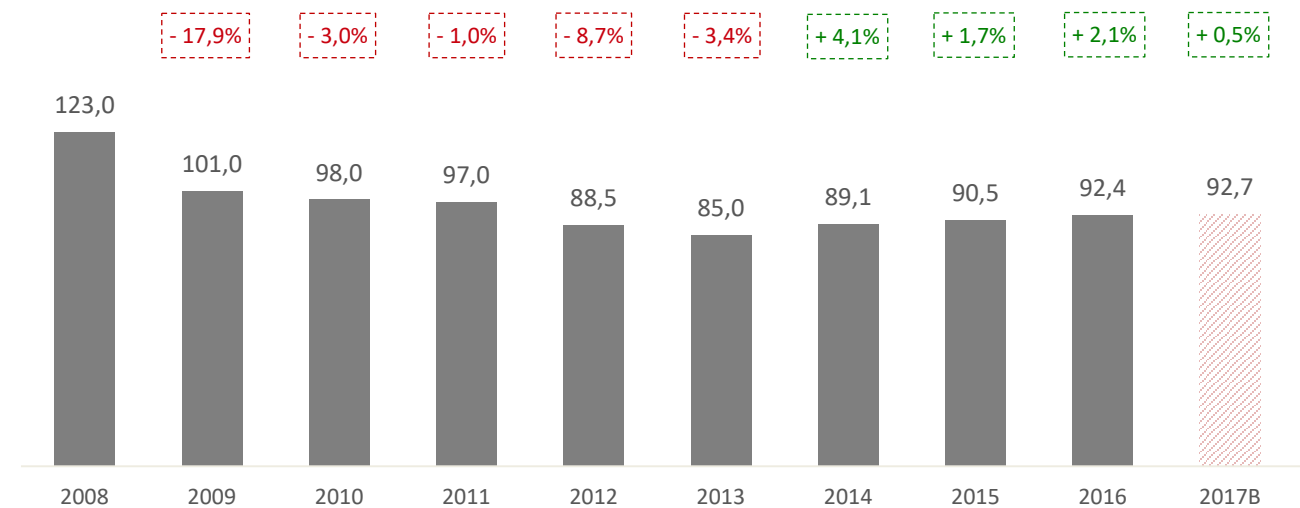
- Late night news magazine
- Mon-Thu 22:15
- **AMR 6,7%, SHR 21,6%**



# MARKET AND REVENUE

## TV MARKET HISTORICAL TREND

NET TV ADVERTISING MARKET  
in EUR million



	2008	2009	2010	2011	2012	2013	2014	2015A	2016A
RTL %	36,9%	37,3%	36,1%	35,8%	32,1%	34,9%	34,1%	34,1%	36,1%
RTL m	45,3	37,6	35,3	34,7	28,4	29,8	30,4	30,9	33,3



**MARKET IN 2017 DECLINING BECAUSE THE FAIL OF AGROKOR**

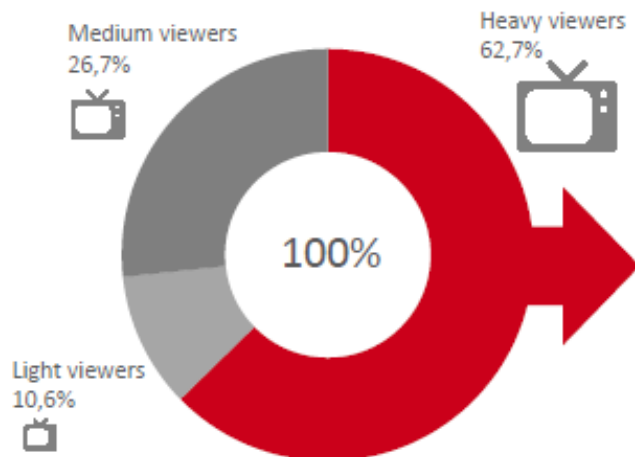
Source: Internal estimates



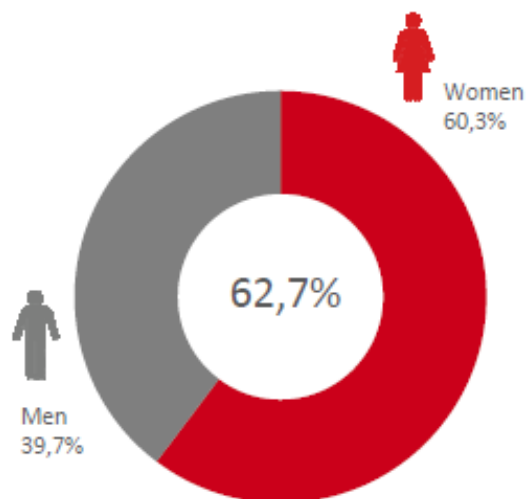
# AGB NIELSEN MEASUREMENT

## HEAVY VIEWERS

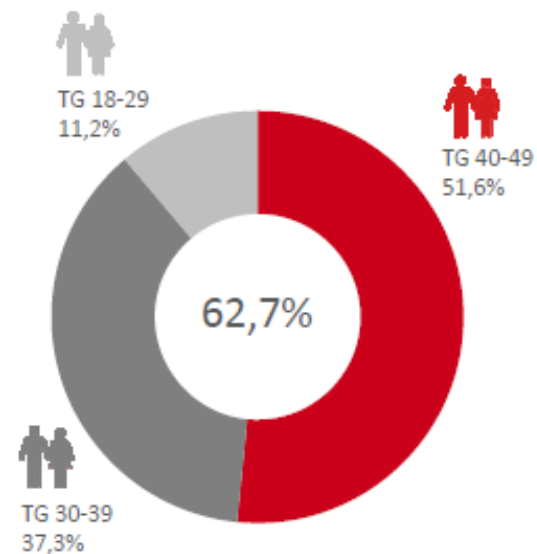
Profile of viewing habits



Heavy viewers



Heavy viewers – age groups



HEAVY VIEWERS WATCH TELEVISION ON AVERAGE MORE THAN 6 HOURS DAILY!!!

**THANK YOU**

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