

egta in figures

114 members

> 70 % of TV advertising investments in Europe

> 50 % of radio advertising investments in member countries

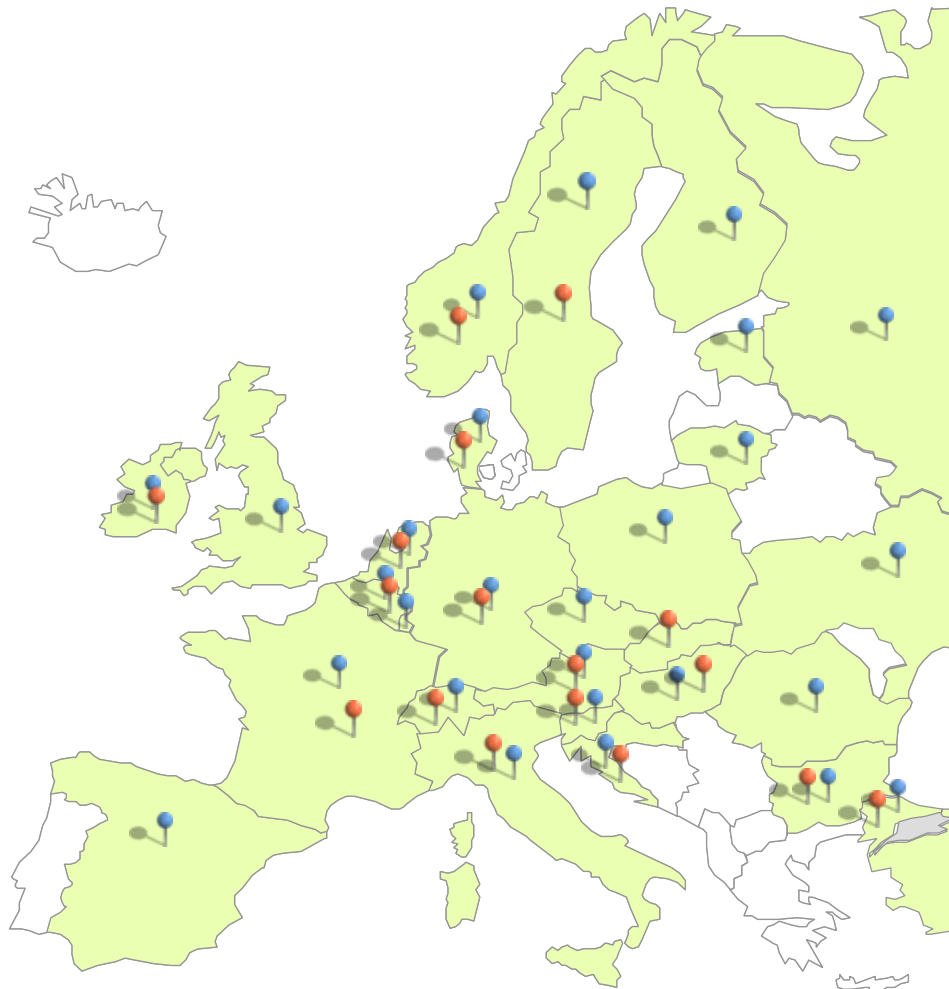
> 40 billion Euros in consolidated turnover

1000 active senior executives in the egta network

2000 advertising experts in regular contact with egta

12 events/conferences per year

egta's global representation



Television Members:

- 71 members
- 27 countries



Radio Members:

- 33 members
- 18 countries





























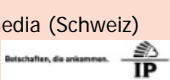


































Non-European Partners:

- 10 partners
- 5 countries



egta's members

71 Television Members:

ARD Werbung 	AS Kanal 2 	ATV WOW! 	Balkan News Corp 	BR TVN 	BR TVP 	Bulgarian Nat. TV 
Canal+ Régie 	Ceská Televize 	Ch4/Nelonen 	Chellozone 	Ciner Reklam 	CTC Network 	DBV Media House 
Digiturk 	DTV Advertising 	El Cartel Media 	Eurosport 	France Télévisions Publicité 	HRVATSKA Televizija 	Hungarian TV Enterprise 
IMP 	Inter-reklama 	IP-Plus Austria 	TVI SA/IP TV 	IP Deutschland 	IP Multimedia (Schweiz) AG 	IP Network 
ITV Commercial 	LRT 	R-Time 	Merkez Reklam 	MTM-SBS 	MTV Media Ltd 	Gazprom Media 
ORF Enterprise 	Pro PLUS 	Publisuisse 	Publicitas Radiotele 	RMB 	RTÉ 	RTL Nederland 
RTVE 	RTV SLO 	SBS Scandinavia 	SevenOne Media 	Sfera TV 	Sipra 	Splendid Media 
Ster 	TF1 	TV2 Reklame 	TV3 – Sweden 	TV4 Nordisk 	Romanian Television 	VAR 
Video Int'l Prioritet 	Video International 	VMMtv 	ZDF 	Zedpas Medya 		

egta's members

33 Radio Members:

ARD Werbung 	BeOne Radio 	Danubius 	Darik Radio AD 	Expres Radio 	HRVATSKA Televizija 	IP France 
IP Multimedia 	Irish Radio Sales	Kronehit 	Lagardère Publicité 	Lagardère Active Radio Int'l 	NRJ Group 	ORF Enterprise 
Publisuisse 	Radio 538 	Radio Argovia 	Radio France Publicité 	Radio Fresh 	Radio FM+ 	RMS Austria 
Radio Marketing Service Germany 	Radiotele AG 	Reksan Reklam 	RTÉ 	RTL Group 	RTV SLO 	SBS Scandinavia 
Sipra 	Sky Radio 	Slager Radio 	Ster 	VAR 		

10 Non-European Members

Aftabnet Iran 	Astral Media Radio	Astral Media TV 	CBC 	e-tv 	Kobaco 	Régie 3 
S.N.R.T. 	Société Radio Canada 	TVA 				

egta's objectives

01



- to address the needs of advertising sales houses, whether individual or common, in helping them **secure**, **develop** and **diversify** their revenue

02



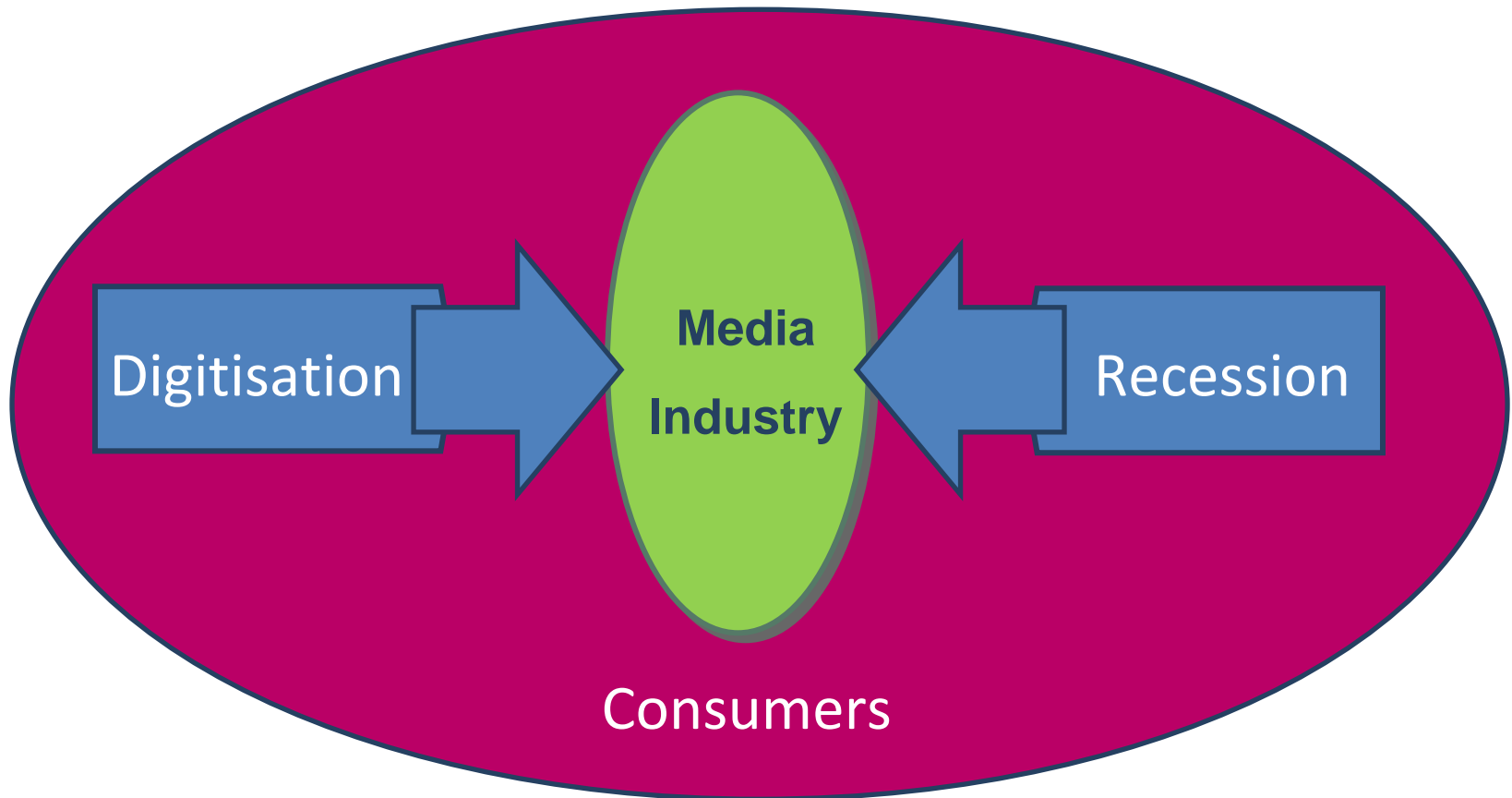
- to work hand in hand with the European institutions and all actors of the advertising industry to help build a **promising future** for commercial communications in a fast-changing technological environment



The Challenge of having money through new sources

Michel Grégoire
Secretary General, egta

The media industry under pressure



What is television today?

Television is now:

“ any long format **audiovisual content**,
linear or **non-linear** and available on
any platform we can think of ”

Marie Oldham, Strategy Director, MPG

the consumer

must be at the heart of advertising planning, not

the platform

content

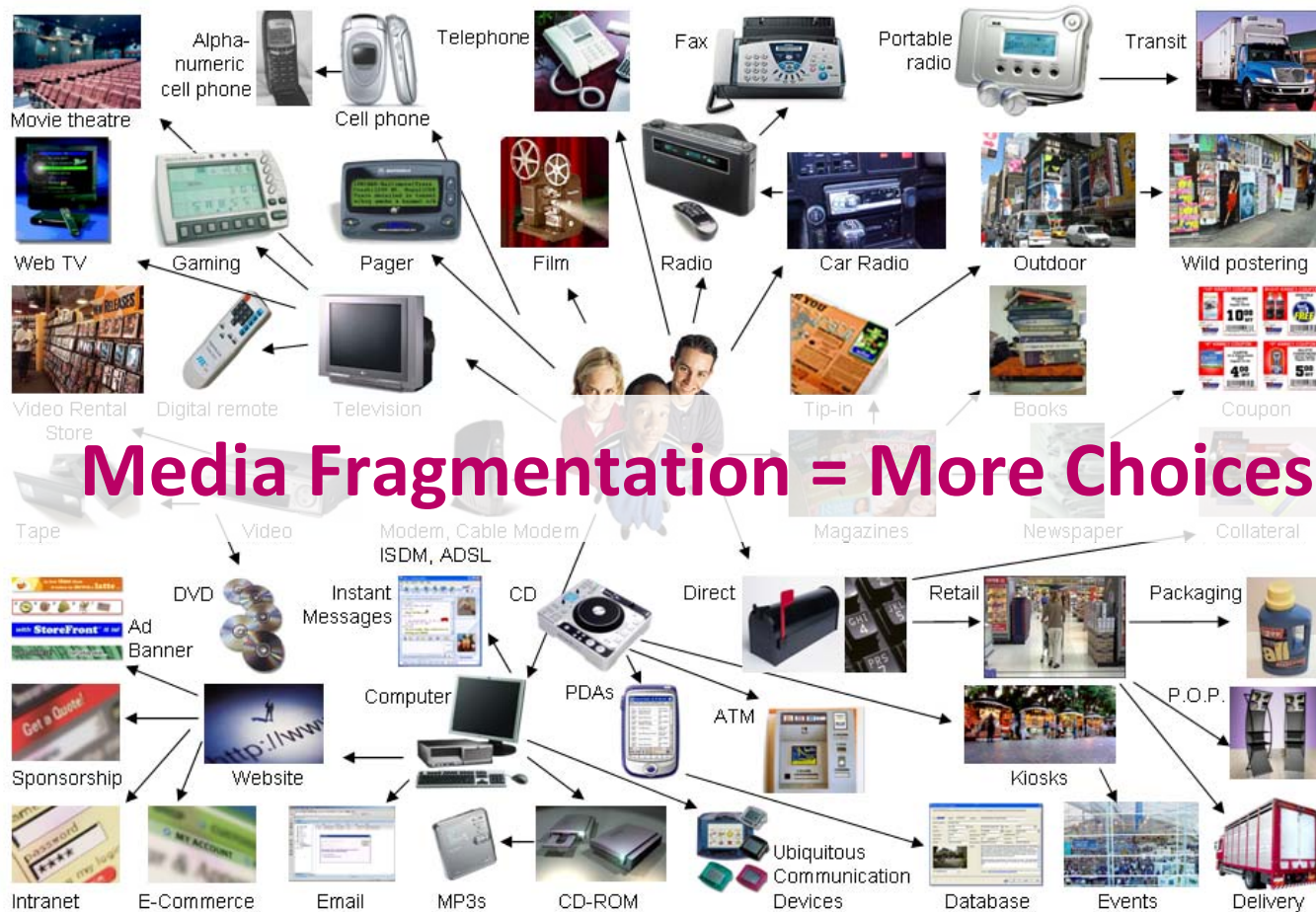
is more important than

technology

TV is not dead

It is just having babies!

Good news?



TV at the centre of a 360° approach



New forms of commercial revenue

Online video advertising

Interactive advertising – red button/green button

Targeted/addressable advertising: OBA

Mobile TV advertising

Gaming devices

Product Placement

Video-on-Demand funding models/Micropayments/SMS

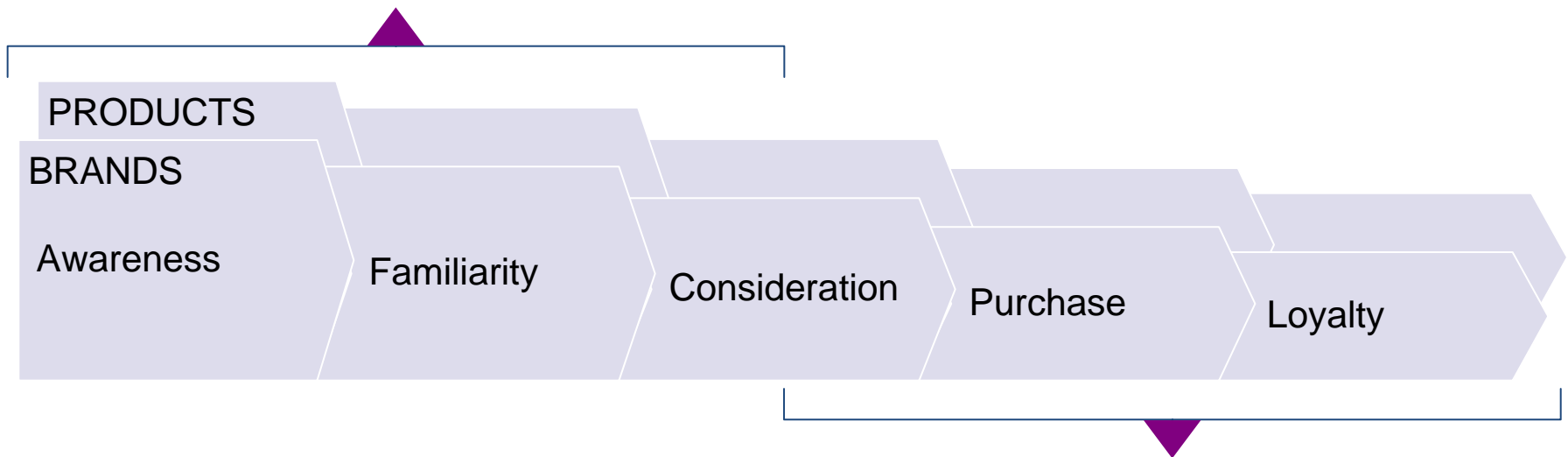
TF1 IS OFFERING INNOVATIVE CONTENTS AND PRODUCTS ON EVERY SCREEN

A “360” experience, to give viewers a way to extend their entertainment
experience beyond the broadcast.



TV's role in the consumer purchase funnel

This is where TV helps the most ...



... but **this** is where
business is won and lost!

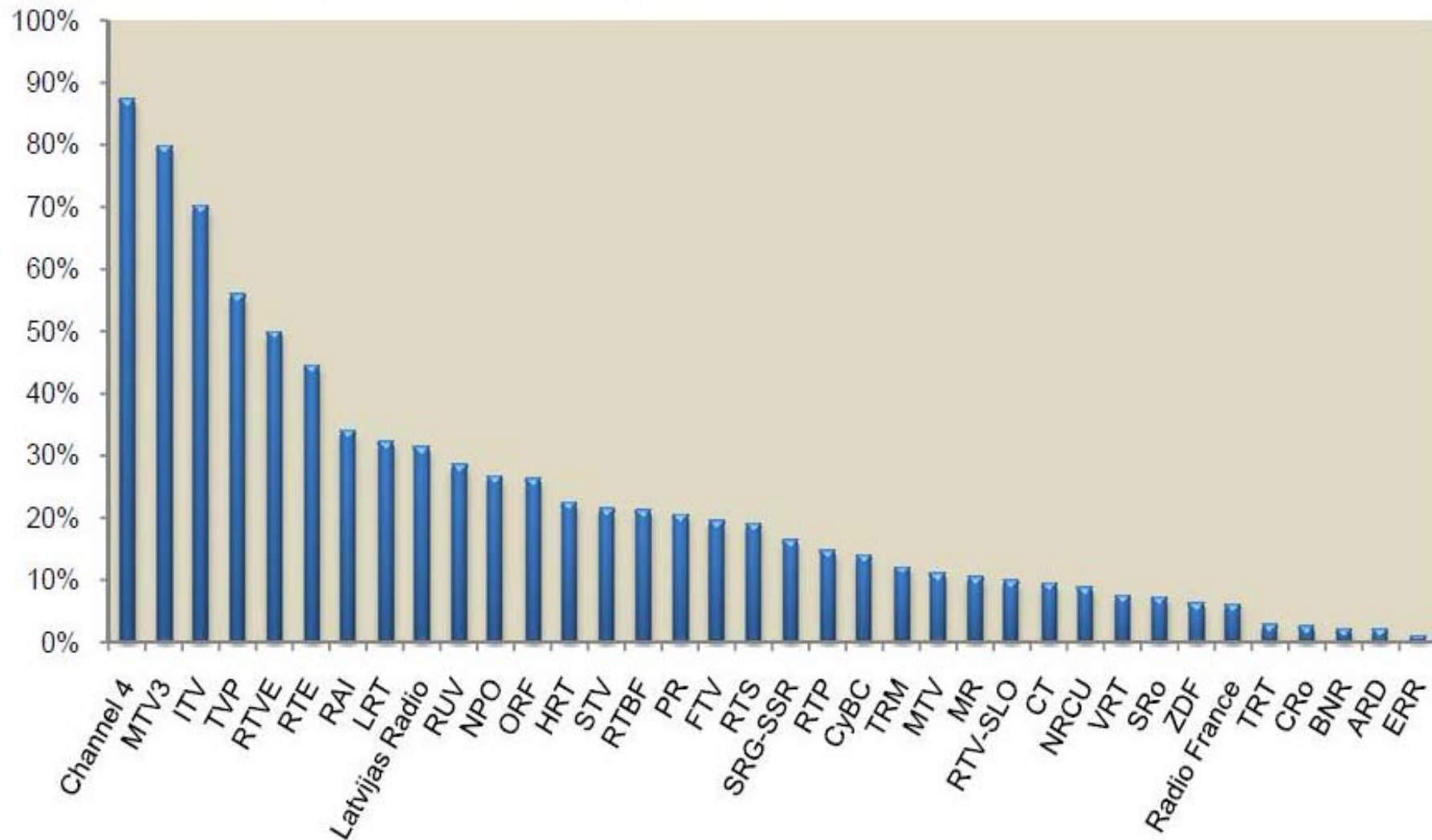
- TV is the catalyst for massive shared experience: it sets the nation's agenda
- TV supports other media to be more effective
- Will TV stay relevant as the key awareness driver?
- Can TV be made more relevant for the later funnel stages?

Advantages of being a regional channel

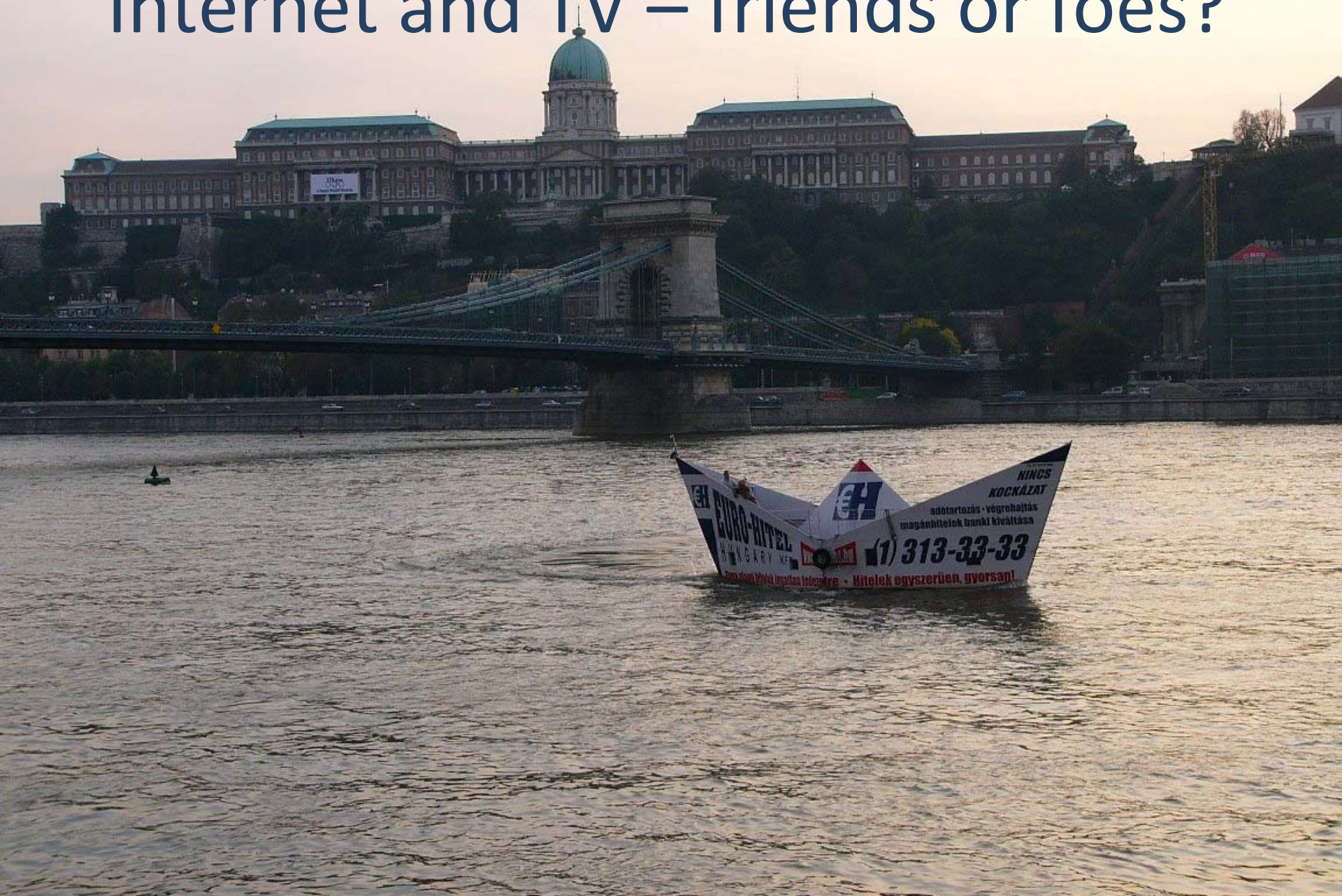
- To give new advertisers the opportunity to access TV
- To be closer to the viewer/consumer
- To accompany the viewer/consumer to the point of purchase. your advantage is to be more local than a national mainstream channel
- To implement cross media campaigns
 - TV/Internet/regional press
 - TV/Internet/local radio channels
 - TV/Internet/mobiles/outdoor..

thank you

EBU members: advertising as part of the total income in 2008 (%)

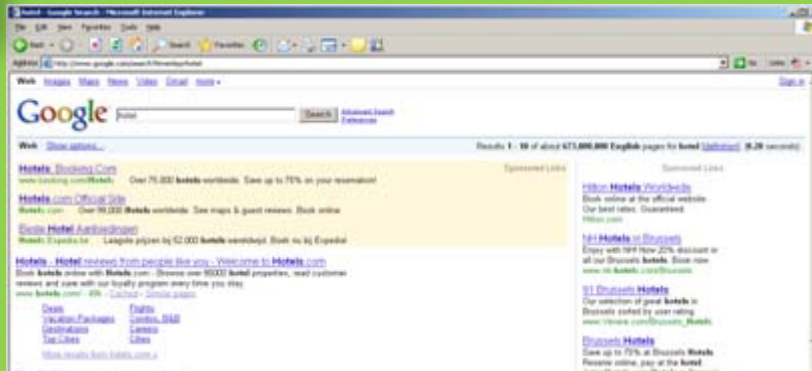


Internet and TV – friends or foes?



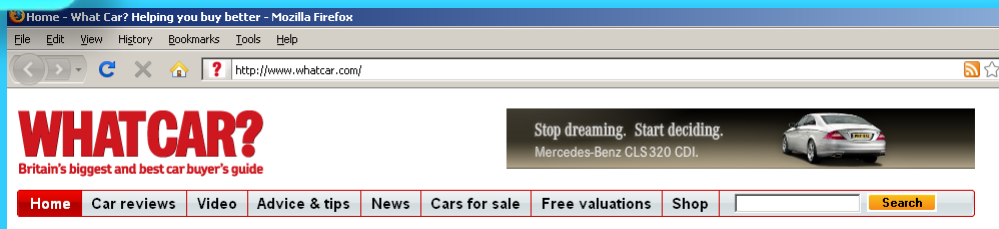
Are they really competing for advertising spend?

1



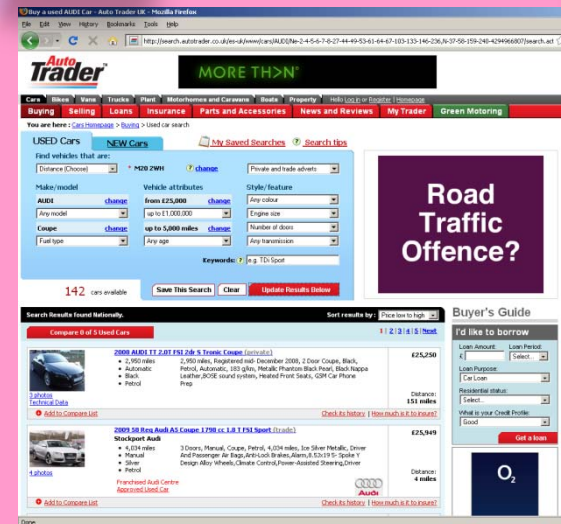
Paid search – no competition with TV

3



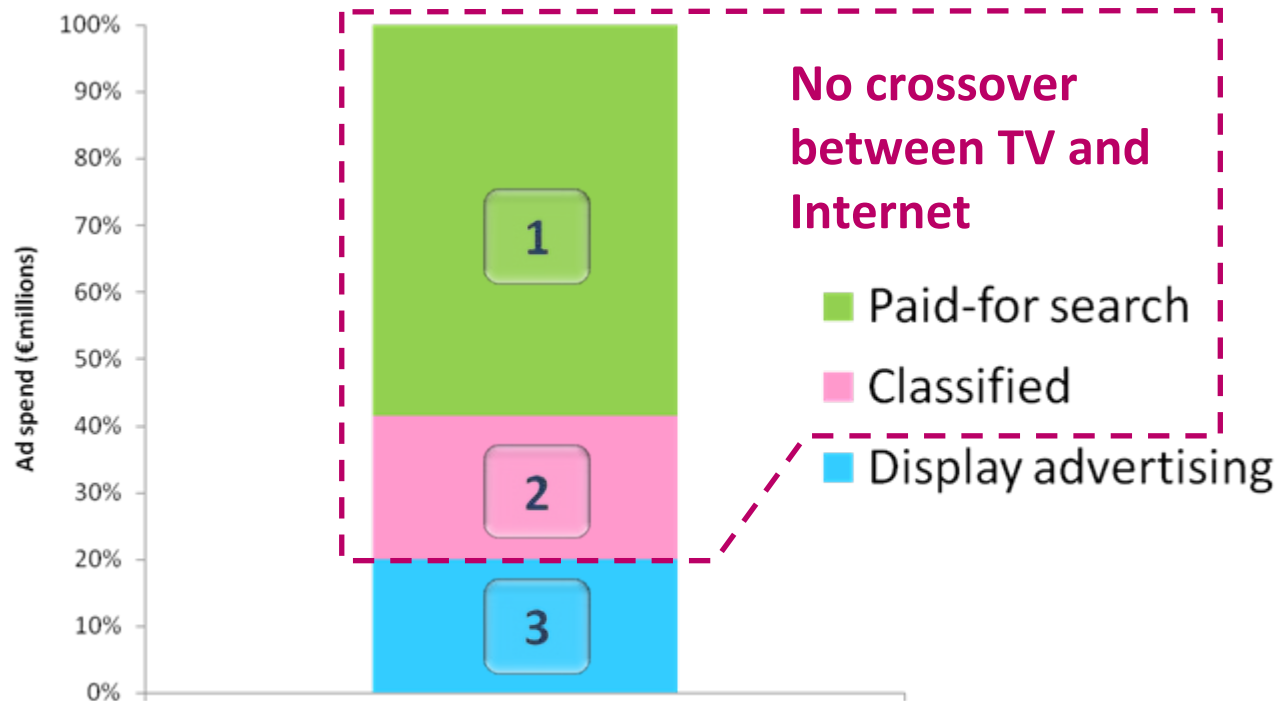
Display advertisement – some competition with TV

2



Classified ads – no competition with TV

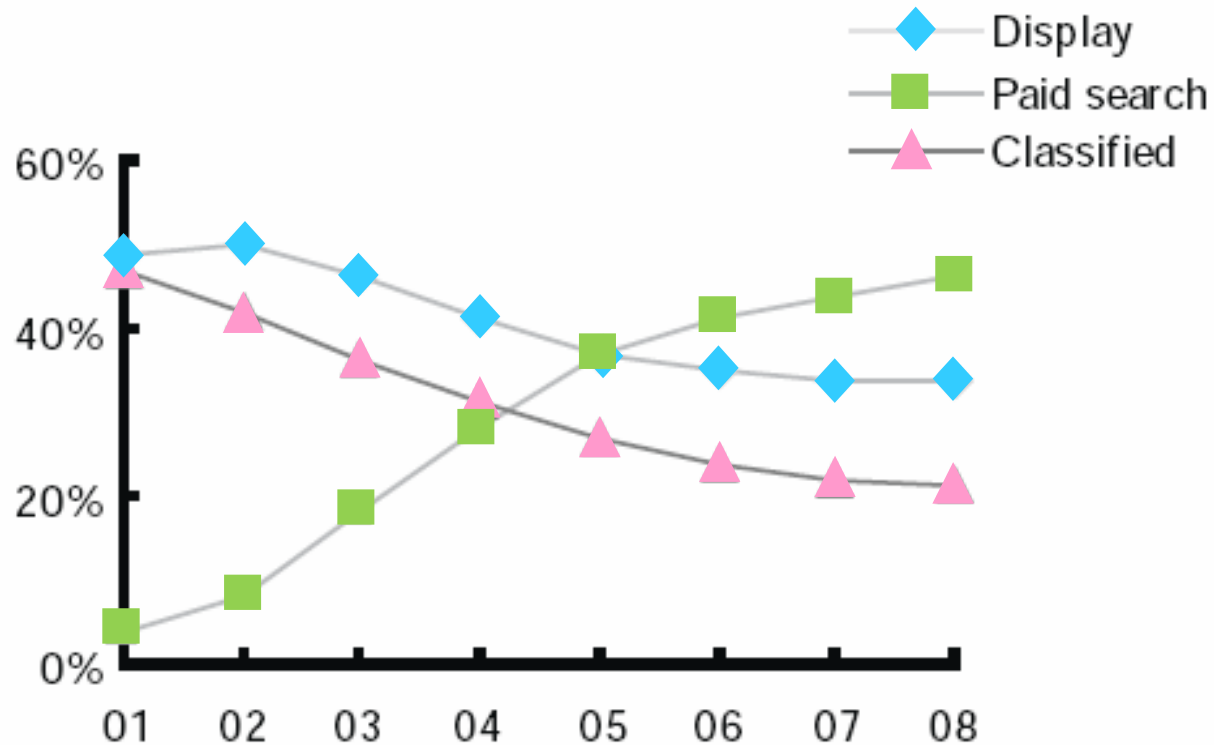
Internet ad spend may be increasing, but ...



... most Internet advertising **does not compete** with TV advertising

Source: Internet Advertising Bureau, 2008 (UK data)

... and the trend is towards paid search

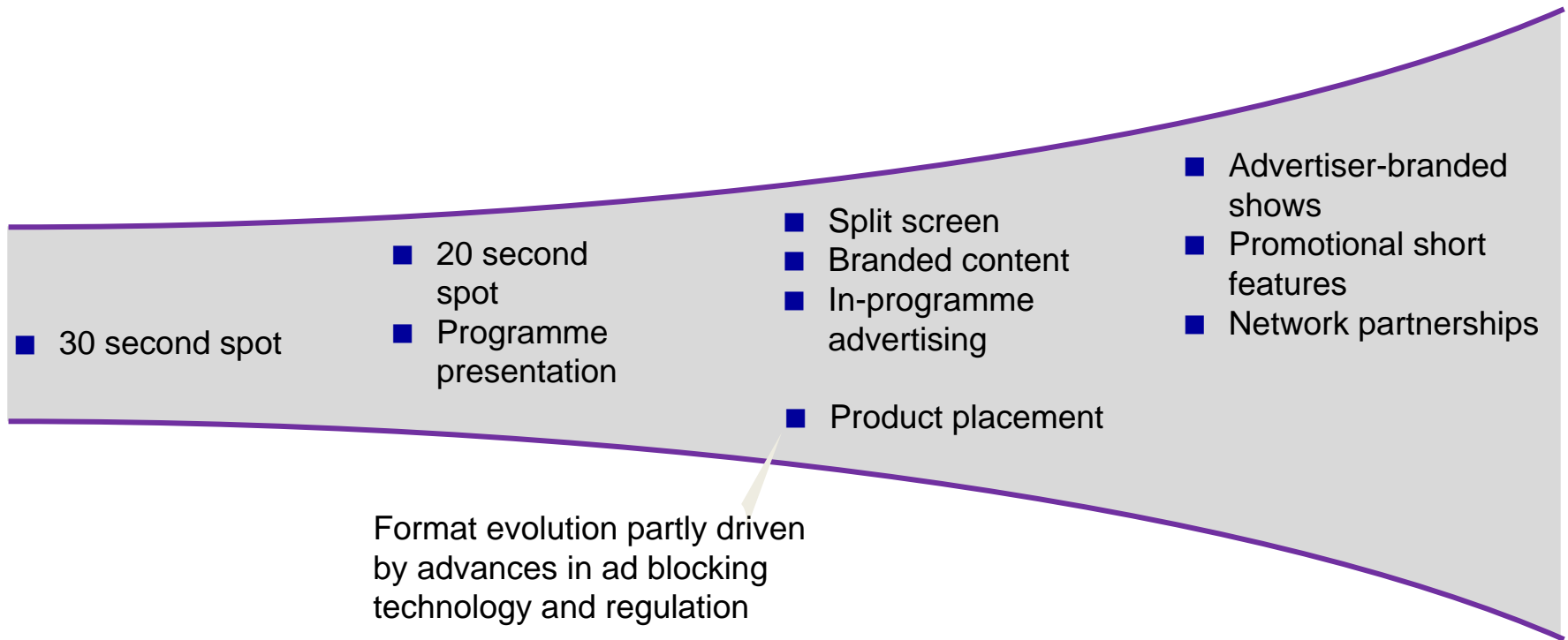


Source: Jupiter, 2008 (European data)

TV communicates through its babies



Change No. 3. New advertising formats



■ **New formats are enhancing or replacing the traditional spot, both at BDF and elsewhere**

Understanding advertisers' needs



Customers are actively managing their media usage

RADIO
327k of daily
hours airtime

EMAILS
1.8 billion
sent daily

**ONLINE
SEARCHES**
200 million daily

BLOGS
1.2 million
created daily

**ITUNES
PODCASTS**
2,000 hours
available daily

MAGAZINES
14,703 articles
daily



MYSPACE
50 million
daily visitors

TV
42,000 hours
daily

**VIRTUAL
WORLDS**
672 hours daily

NEWSPAPERS
72,800 daily
columns

**MOBILE
PHONE
SUBSCRIBERS**
388 million
hours daily

**TEXT
MESSAGES**
260 million
daily

**ITUNES
VIDEOCASTS**
200 hours
daily

**INSTANT
MESSAGES**
5 billion daily