



RTL AdAlliance

23th of November, Helsinki

Future of CTV in a world of measurements



Meet RTL AdAlliance

We are joining forces to create a unique advertising powerhouse.

RTL AdAlliance



Europe's leading adtech platform for digital video

750+ premium publishers
14 countries



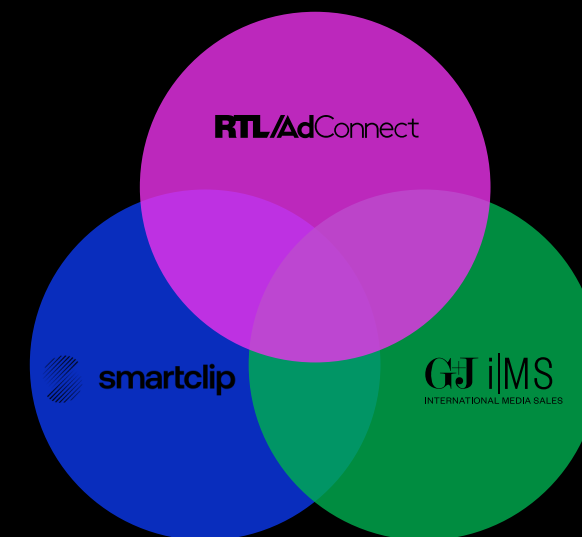
International sales network for leading media brands in digital and print

900+ print, digital & broadcast media brands



The #1 Total Video sales house in Europe

180+ TV channels
40+ radio stations
300+ digital platforms
14 countries



RTLAdAlliance provides you with the best advertising offer



Unique reach.

Working with the #1 partners in each market and with each media



Solutions for all needs.

Providing you with tailor-made solutions



Simplification.

From booking to invoicing, one tool and one contact point.

**Why are we
talking about CTV?**

Streaming ad spend grew 57% in 2021 reaching \$15.2B, market to more than double from 2020 to 2022

NEWFRONTS

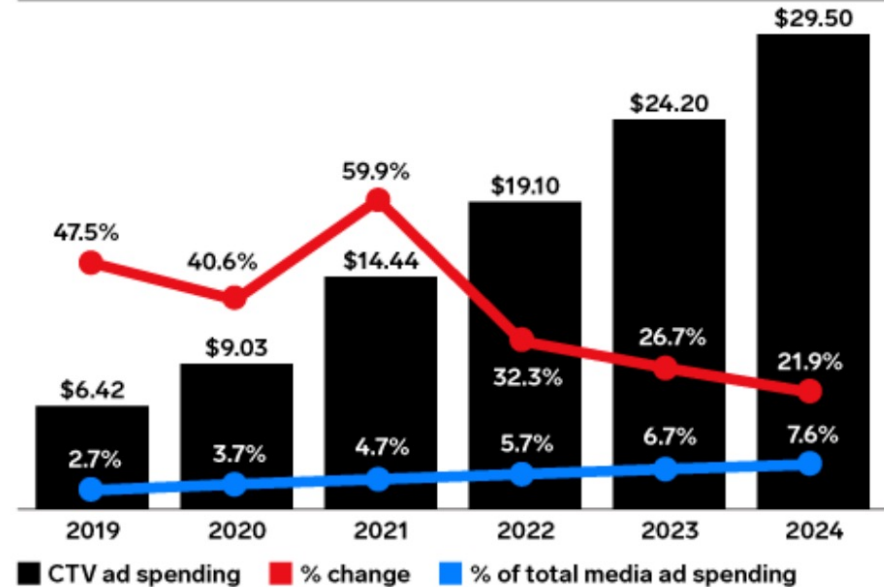
Connected TV Ad Spend Expected to Hit \$21.2 Billion This Year, Up 39% From 2021

GroupM: Global Connected TV Ad Revenue to Hit \$32.6B by 2026

By [George Winslow](#) published December 06, 2021

U.S. TV advertising will not return to 2019 levels until 2023, and the declines in traditional TV viewership will 'generally make TV less attractive to many marketers,' according to GroupM

US Connected TV (CTV) Ad Spending, 2019-2024
billions, % change, and % of total media ad spending



Note: digital advertising that appears on CTV devices; includes display ads that appear on home screens and in-stream video ads that appear on CTVs from platforms like Hulu, Roku, and YouTube; excludes network-sold inventory from traditional linear TV and addressable TV advertising

Source: eMarketer, Oct 2021

A woman with long, wavy blonde hair, wearing a red sequined dress and large gold earrings, is smiling broadly. She is looking towards a man on her right. The man is wearing a dark tuxedo jacket, a white shirt, a black bow tie, and black-rimmed glasses. He is also smiling and looking at the woman. The background is a solid, vibrant red. The overall mood is celebratory and elegant.

**How can we
maximise the
CTV
opportunity?**

CTV is facing three main challenges



Lacking a clear definition



Lacking scale especially in smaller EU markets



Does not fit the standard measurement paradigm

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CTV – What is it?

Question!

Which of the following scenarios would you consider watching TV?

- Watching Netflix on my laptop
- Watching YouTube on my Samsung SmartTV
- Watching YLE Areena on my iPhone
- Watching Ruutu on my tablet
- World Cup opening match broadcasted on YLE

Follow up question

Which of the previous video watching scenarios would you consider CTV?

- Watching Netflix on my laptop
- Watching YouTube on my Samsung SmartTV
- Watching YLE Areena on my iPhone
- Watching Ruutu on my tablet
- World Cup opening match broadcasted on YLE

Definition

Connected TV – IAB EU definition

A TV that is connected to the internet via an internal device (i.e. Smart TV) or an external device (for example, Apple TV, Roku or gaming consoles).

Video content is delivered to a TV screen, through the internet.

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“Pure CTV” lacks scale in EU

Broadcaster apps dominate all CTV app stores

Local language programming is key to attract audiences

Global AVOD providers lacking most premium content

Focus tends to be on niche FAST channels

New Life of the Living Room Study

Equipment at home to watch video content

Is your TV set directly connected to the Internet via a wired (Ethernet) or WI-FI connection ? (in %)



Base: Own a TV set

Using connected TV is slightly less common for Finnish citizens if compared with the EU average, but the number is significantly higher for the target group (youth 18-34 years old).

2.8 million
Family Units

1.9 million
Family units that have digital
paying TV subscriptions

1.3 million
Family units that own a
Connected TV

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Does not fit the standard measurement paradigm

What are the challenges with measurements?

Data becomes fragmented across numerous platforms and devices

Lack of identifiers between platforms, differing metrics, and third-party involvement

Inability to measure reach and frequency across CTV and other digital media channels

A lack of collaboration between each party involved with the delivery of CTV will be a challenge

Food for Thoughts

Linear TV is declining, CTV filling up that gap

Increased touch points = Increased Connection Opportunities
= Increased headaches

CTV as the silver lining to the cookie catastrophe

Fresh start!

R T L

Thank you.