

WELCOME TO THE ERA OF

# TOTAL VIDEO

THE BEST OF BOTH WORLDS:

**BROADCAST AND DIGITAL**

# BROADCASTERS EXPECT A STEP CHANGE TO DELIVER THE BEST OF BOTH WORLDS



"In the 5 next years, we believe advertising will be **digitally delivered** and **sold on data impressions** across all platforms, transacted through **automated channels**"

Linda Yaccarino in 2019

NBCUniversal



"We are launching CAP 2022 because we need a hybrid model to **converge on a 50/50 audience planning/content planning** vision, and shift from a silo approach to a **cross-disciplinary approach**"

Sylvia Tassan Toffola in 2018

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# TOTAL VIDEO

1. CONVERGENCE OF TV/VIDEO VIEWING: WHERE ARE WE?
2. CONVERGENCE PROJECTS: SINGLE CURRENCY, STANDARDISED CROSS-MEDIA METRICS
3. TOTAL VIDEO: SHARING THE GAINS BETWEEN ADVERTISERS AND AD SALES HOUSES

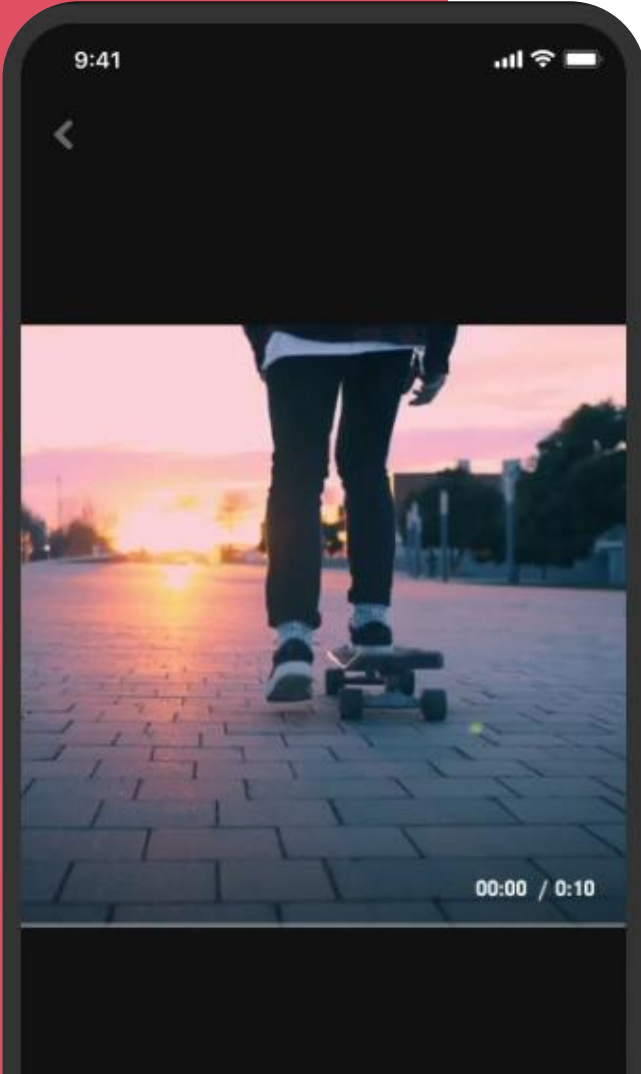
**T F 1**  
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**COVID CRISIS:  
A CATALYST FOR  
VIDEO CONSUMPTION**

**01**

**T F 1  
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# + 28 MINUTES VIEWING TIME PER DAY



Mediametrie Global Video Survey – All platforms & and all screens – French people aged 15+

March-June 2019



**4h 40**  
per day

Sept-Nov 2019



**4h 52**  
per day

March-June 2020



**5h 20**  
per day

# BROADCASTERS TAKE LION'S SHARE OF VIEWING TIME

9%: Video on demand

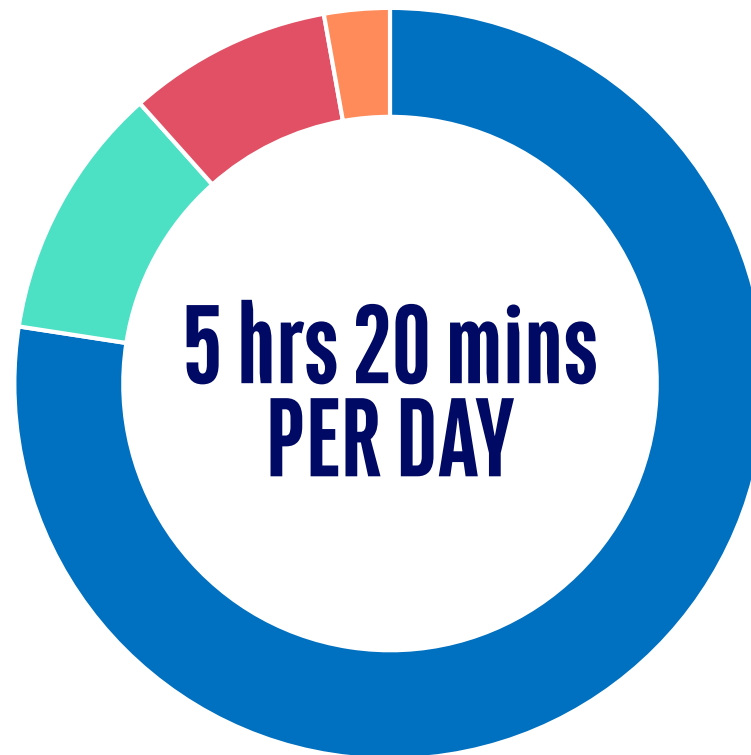
28 mins

NETFLIX Disney+ ...

11%: Video online

35 mins

YouTube vimeo ...



3%: Social video

9 mins

FACEBOOK Snapchat ...

77%: 4-screen TV

4 hrs 7 mins

TF1 6play ...



NETFLIX



**2 MILLION INDIVIDUALS AGED 15+**  
**VOSDAL\* AUDIENCE REACH**

*Survey data*

\*Viewing On Same Day As Live

**10.5 MILLION INDIVIDUALS AGED 15+**  
**VOSDAL\* AUDIENCE REACH**

*Mediamat data*

253 out of 329 evenings on TFI had VOSDAL reach of >10m people aged 15+

AUDIENCE UPLIFT ON

**| MY TFI |**



— 20%



— 17%



**CONVERGENCE IN  
TV VIEWING**

Average prime-time audience

**| MY TFI |**

**395,000**

TNT

**488,000**



# NEW LIFE CYCLE FOR TV CONTENT



## 4-screen TV

Live TV – Timeshift - Live digital –  
Premieres – Catch-up



## Video online

Extracts – Bonus video



## Social video

Bonus video – Live Social - Challenges



## Video on demand

SVOD - AVOD



**TOTAL VIDEO:**  
**A GLOBAL MOVEMENT**  
**IN THE AD INDUSTRY**

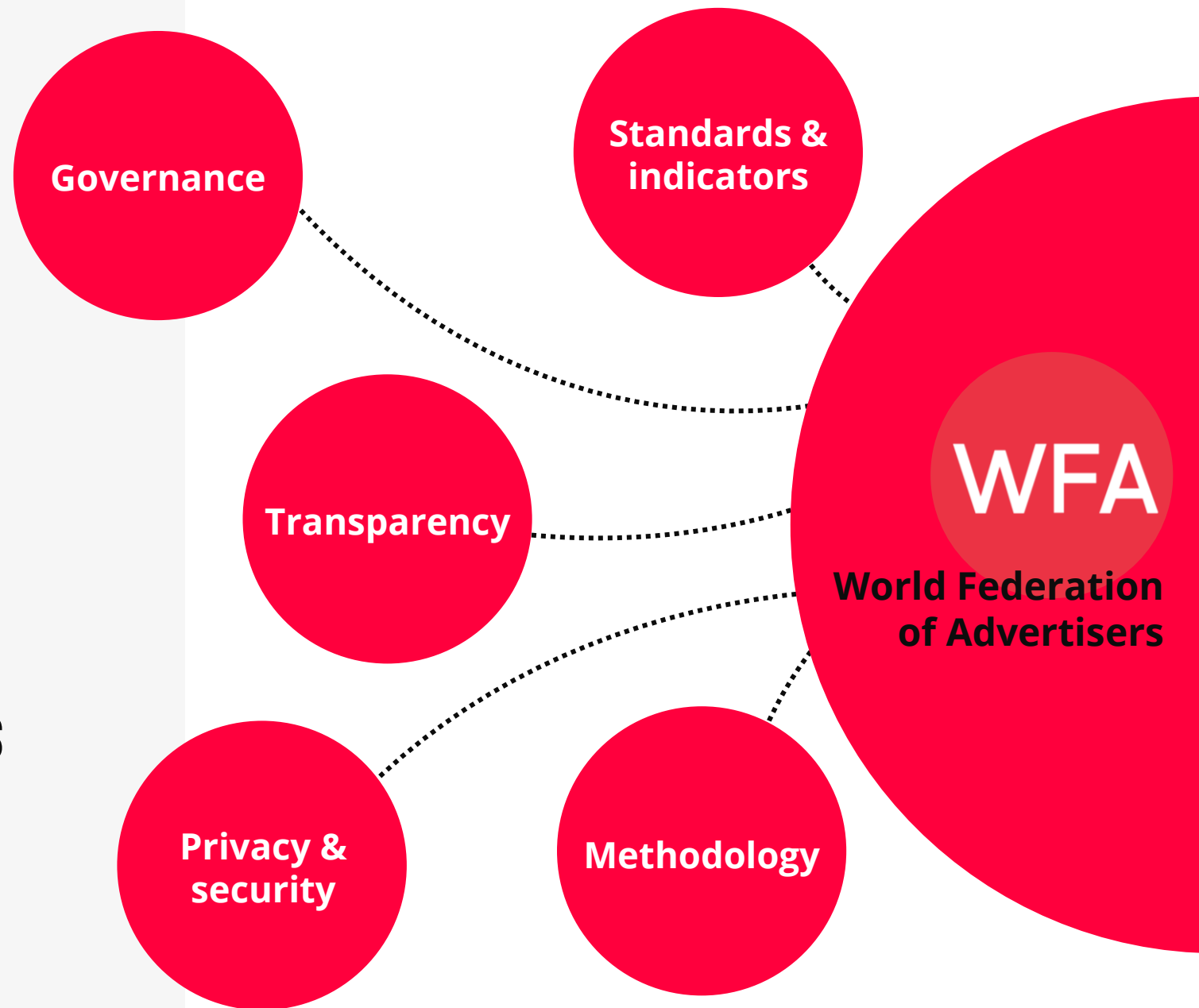
02

**T F 1**  
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# WHAT ADVERTISERS WANT

## January 2020 Manifesto

setting out principles for standardised indicators and cross-media metrics to deliver a seamless Total Video ad experience



# THE OBJECTIVE?

## 1. Comparing the power of different video channels

€5.68

Average net CPM on TF1 for 15+ year-olds in the most expensive week of the year



€12.44

Average net CPM on YouTube for Google Preferred channels



## 3. Comparing costs by media and by country



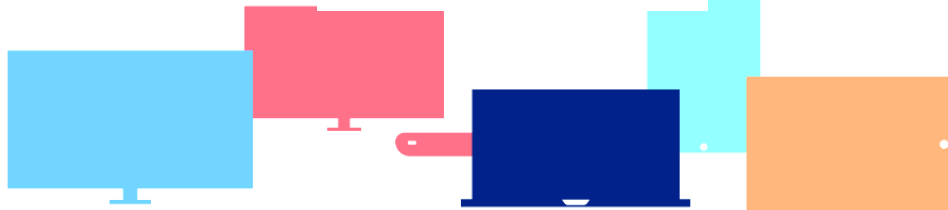
## 2. Aggregating and deduplicating reach across all video channels

# 01

## HOLISTIC TOTAL VIDEO CAMPAIGN METRICS

# 15.5m

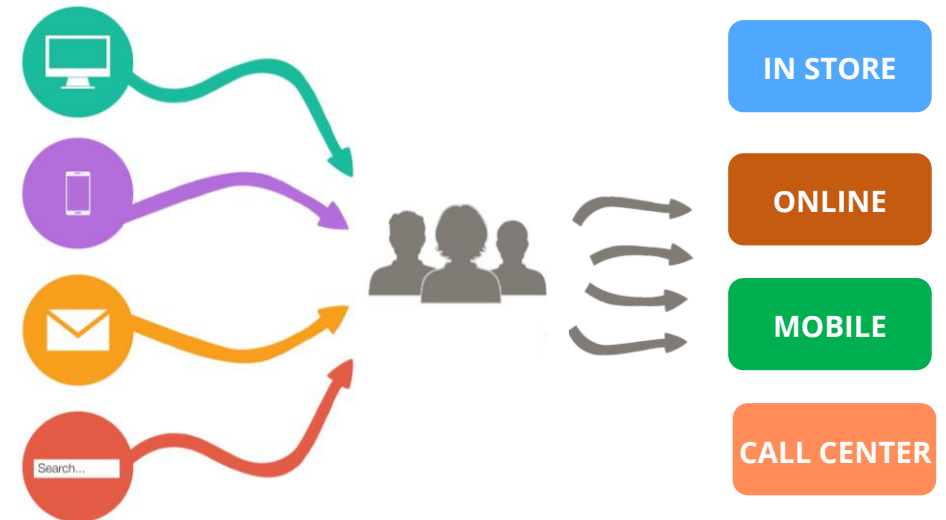
### Deduplicated reach



MEDIA PERFORMANCE

# 02

## FAIR, STANDARDISED EFFECTIVENESS & ROI METRICS



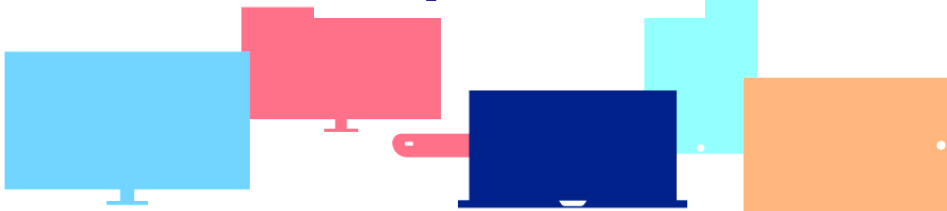
BUSINESS PERFORMANCE

01

## HOLISTIC TOTAL VIDEO CAMPAIGN METRICS

15.5m

Deduplicated reach



MEDIA PERFORMANCE

02

## FAIR, STANDARDISED EFFECTIVENESS & ROI METRICS

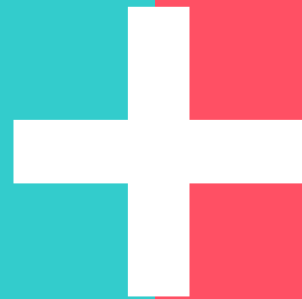


BUSINESS PERFORMANCE

# 2 CHALLENGES FOR TOTAL VIDEO METRICS



**Contract  
deduplication**



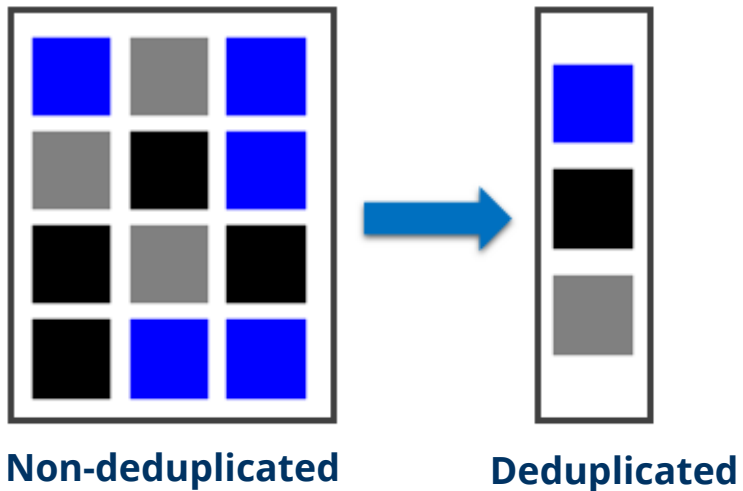
**Single  
currency**

# 1. PROPOSING A POWERFUL DEDUPLICATION MODEL

NBCUniversal sky 



 nielsen XCR



INTRODUCING "C FLIGHT"





## 2. DEFINING "CONTACT" SO THE RIGHT CURRENCY IS ADOPTED

The definition of "contact" must align on  
the highest standards in the market

1 x 20-second ad viewed  
for 2 seconds

=

TV  
0.1 contact



Digital  
1 contact

▶ CPM DATA

100%  
VISIBLE  
COMPLETION  
BRAND SAFETY

# WORKING WITH INTERNATIONAL PLAYERS ON GRANULARITY OF INDICATORS



01

## HOLISTIC TOTAL VIDEO CAMPAIGN METRICS

15.5m

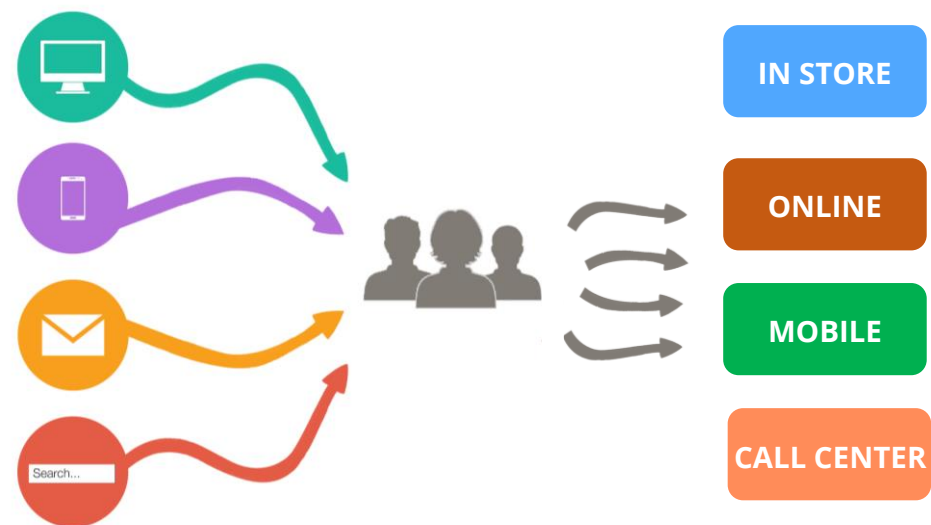
Deduplicated reach



MEDIA PERFORMANCE

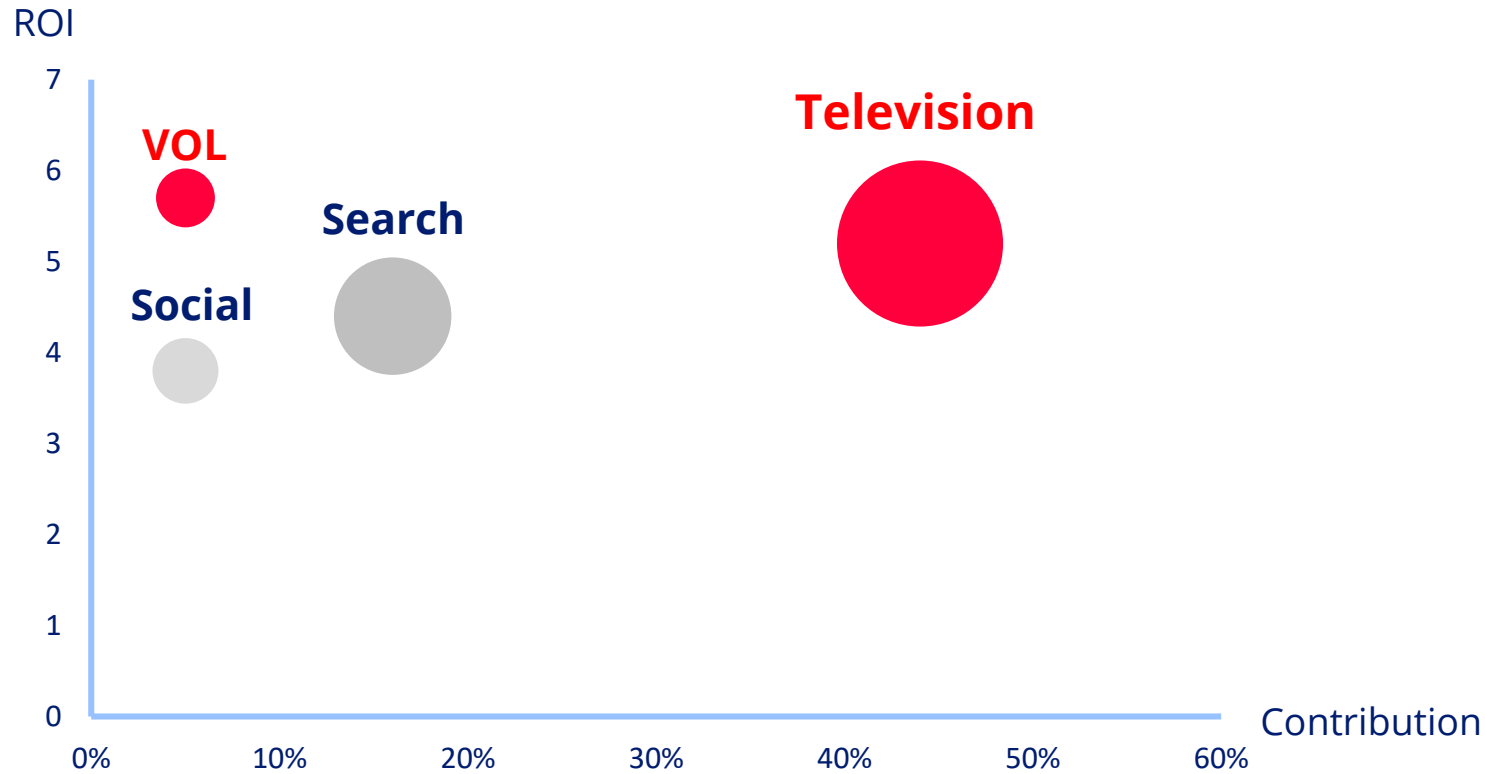
02

## FAIR, STANDARDISED EFFECTIVENESS & ROI METRICS



BUSINESS PERFORMANCE

# TV AND VIDEO HAVE DEMONSTRATED THEIR EFFECTIVENESS



## Ekimetrics.

Econometrics study on short & long term media ROI

**44%**

Contribution to sales  
(vs 32% of total invested)

**5.2**

Overall ROI (per €1 invested)

**6.1**

Overall ROI inclusive of synergies

OPTIMISING THE VALUE  
OF OUR INVENTORY  
THROUGH

# TOTAL VIDEO TARGETING

## Multiscreen data

**TARGETS**  
SHOPPERS  
INTENTIONAL  
ATTITUDINAL  
CUSTOM

KANTAR  
Mediametrie  
| MY TFI |  
unify

## Guaranteed interoperability

**4-SCREEN  
TARGETS**



## Effective sales leverage

**+ 6%**

Average  
incremental  
sales uplift

Food: +6%  
Cleaning: +7%  
Perfumes: +9%  
Health/Beauty: +8%  
Retail: +4%

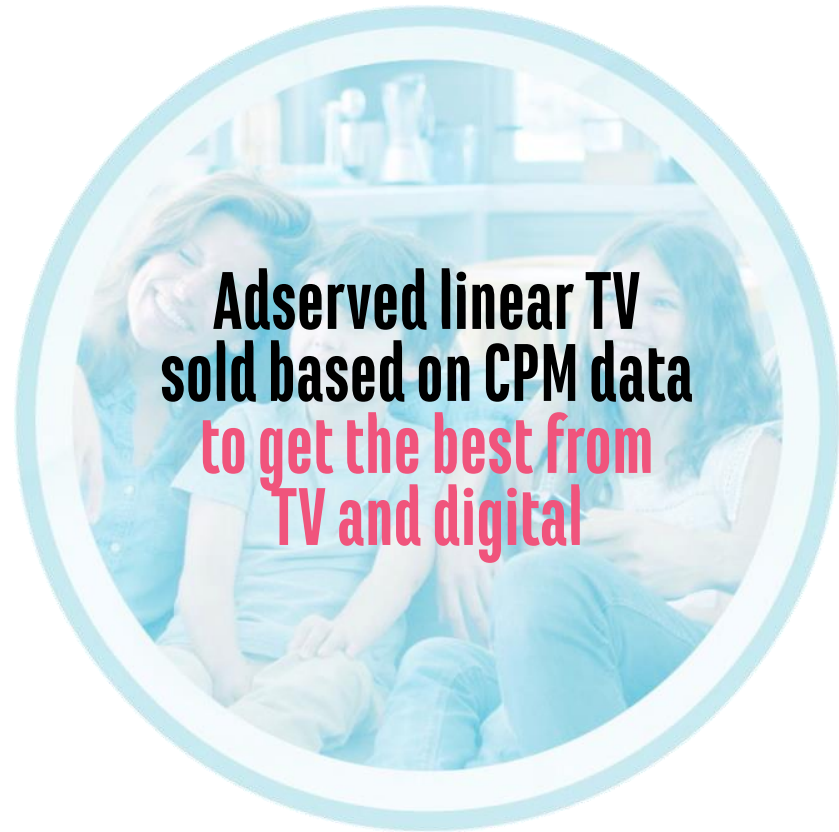


**TOTAL VIDEO:  
SHARING  
THE GAINS**

**03**

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# 2021: LAUNCH OF SEGMENTED TV



Marseille



Paris





Reasserting the power of mass media  
with all-location metrics



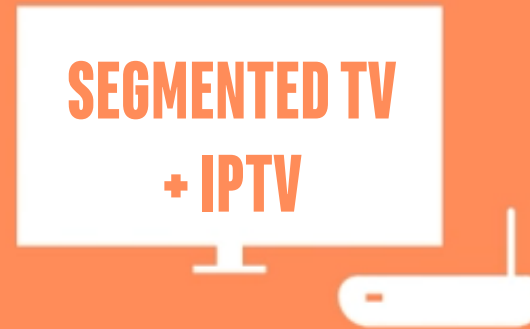
The missing link in the shift  
to more granulated targeting



Address additional  
audiences at scale



ONE TO  
MANY



ONE TO  
HOUSEHOLDS



ONE TO  
ONE



# THE CHALLENGE FOR TV: ANTICIPATING THE POST-CRISIS WORLD

## 1. Sustaining value

**Fair valuation and comparability of TV across different countries and media:**

Potential for price uplifts

**4-screen data targets:**

Better inventory monetisation

## 2. Conquering new territory

**Programmatic TV:**

Getting digital and D2C advertisers into TV

**Segmented TV:**

New entrants to the TV market

# SHIFT TO TOTAL VIDEO WILL MAKE TV MORE...



**STANDARDISED METRICS & REPORTING**



**SINGLE CURRENCY**



**SEGMENTED TV**



**PROGRAMMATIC TV**



**MULTISCREEN DATA TARGETS**



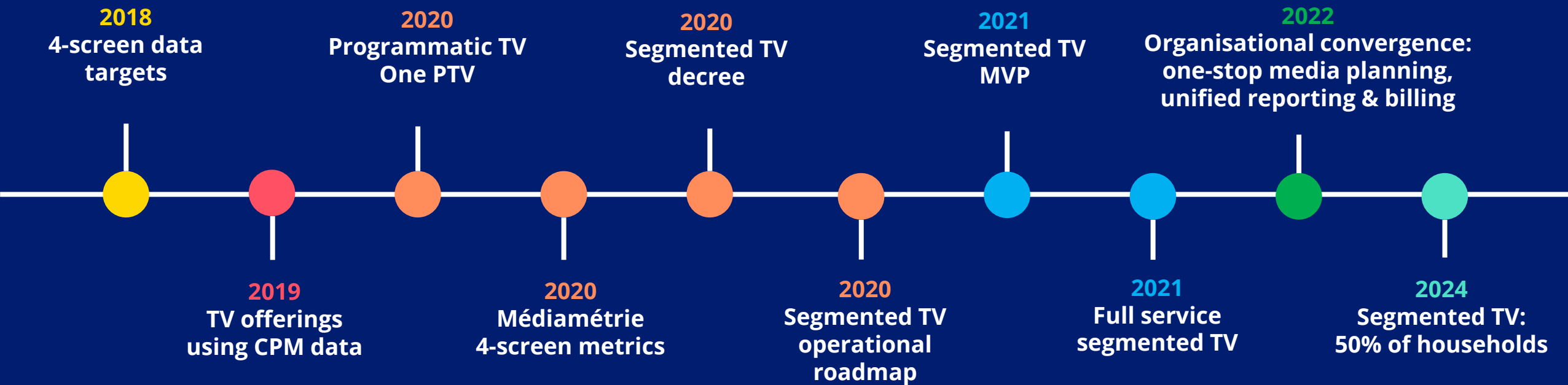
**CROSS-MEDIA PLANS**

**...COMPETITIVE & TRANSPARENT**

**...ACCESSIBLE & AGILE**

**...EFFECTIVE & CONVERGENT**

# THE ROAD TO TOTAL VIDEO IN FRANCE



2018

2024

**THANK YOU!**

**T F 1**  
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