THE UNIQUE CROSSDEVICE ADVERTISING PLATFORM
THE MEDIA PARADIGM IS CHANGING

INDIVIDUAL MEDIA CONSUMPTION IS CROSSDEVICE
DIGITAL TELEVISION LANDSCAPE

57% OF HOUSEHOLDS CONNECTS THE SMART TV TO INTERNET

SUMMARY SCOPE OF INDIVIDUAL

Source: PAY TV & OTTS: EGM 3rd Wave November 2019 | HBBTV European Broadcasting Union 2019
(https://www.hbbtv.org/deployments/#spain)
DIGITAL TELEVISION LANDSCAPE

Linear TV

7% OF ACTIVE TVs

Linear TV & OTT

88% OF ACTIVE TVs

OTT

6% OF ACTIVE TVs

Source: Samsung Consumer Electronic Proprietary Business Intelligence Q1-19 | 2.9 MM Connected TVs | Minimum session length of 3min
CHANGES IN LINEAR TV CONSUMPTION

IN 8 YEARS

- 11% TIME
- 4% REACH

IT’S NOT A SIGNIFICANT CHANGE. IT SHOWS THE TREND TOWARDS DIGITAL CONVERGENCE

Source: EGM 2011 to 2018
INTERNET AND TV ARE CONVERGING

TV AND INTERNET ARE THE BEST FIT FOR AUDIENCE AND TARGET COMPLEMENTATION

TV AND DIGITAL WILL BE AT THE CENTER

REACH

Source: EGM 2011 to 2018
79% OF SPANISH POPULATION WATCHES ONLINE VIDEO

ONLINE VIDEO CONSUMPTION BY DEVICE

- DESKTOP/LAPTOP: 83%
- MOBILE: 61%
- SMART TV: 38%
- TABLET: 34%

AVERAGE PER PERSON AND DAY: 2 hours 40 minutes

50% OF CONNECTIONS THROUGH FIBER

Sources:
1. Consumption online video: Estudio Video Online IAB Spain 2018 | Population between 16 and 65 years old
2. Connection through fiber: Observatorio Nacional de las Telecom. y Sociedad de la Información (ONTSI) Jun 2018
GROWTH OF AUDIOVISUAL CONSUMPTION

Lineal TV consumption (Per day/viewer)

3hs30’ + 2hs40’

Online video consumption (Per day/viewer)

CONSUMPTION OF THE SAME CONTENT IN DIFFERENT PERIODS IN DIFFERENT DEVICES

SECOND SCREEN USE OF MULTIPLE SCREENS SIMULTANEOUSLY, MAINLY MOBILE SCREEN

Sources:
ADVANCED TV

THE OVERALL TV MARKET WILL BE BIGGER THAN EVER

INTEGRATION BETWEEN TRADITIONAL TV AND DIGITAL VIDEO

2019

TV Lineal
TV On Demand

Digital Video

2022

TV Lineal
TV On Demand

Digital Video

2025

TV Lineal
TV On Demand

Digital Video

Source: Marketing Department Smartclip Jun 2019
THIS IS THE CHALLENGE

**TV:** mass media, concentrated, 1 model

- **Off Line | Mass Media**
  - Reduced number of advertising players
  - Concentrated audience

- **Digital**
  - Televisions
  - Editorial Groups
  - Magazines
  - Radios

- **Commercial Model**
  - GRP
  - VIDEOTV Standardarization of formats

- **Reach**
  - 85% SPANISH POPULATION

**INTERNET:** Digital, scattered, multi-model

- **Digital**
  - Social Networks
  - Native Media
  - Blogs
  - Etc.

- **Commercial Model**
  - CPM, CPC, CPV, CPL, ...

- **Reach**
  - 78% SPANISH POPULATION

**MEDIA INTEGRATION**

- **Digital + Mass Media**
  - **MULTIDEVICE MULTIFORMAT**
  - **WALLED GARDEN DATA TV**

- **AUDIENCE**
  - **GRP, CPV, VGRP, CPM, CPC, CPL, CPE ...**

Sources:
1. Reach: EGM 2018
2. Investment: Estudio Infoadex y la inversión publicitaria en España 2019
HOW IS SMARTCLIP POSITIONED FOR THE CHALLENGE?

- +120 EMPLOYEES
- +7 OFFICES
- SMARTCLIP SPAIN AND LATAM
- BACKBONE TECHNOLOGY

- 86 EMPLOYEES in Spain
- 14 EMPLOYEES in Brazil
- 1 EMPLOYEE in Canada
- 1 EMPLOYEE in Argentine
- 1 EMPLOYEE in Chile

SMARTCLIP SPAIN: POSITIONING

#3
IN THE SPANISH MARKET
~€50 Mill combined

SEM
Google ~98%
SIM OTHERS ~2%

TOTAL SEM ~€950 Mill

DISPLAY VIDEO
Google ~17%

TOTAL DISPLAY VIDEO ~€910 Mill

MAIN INDEPENDENT PLAYERS

REST OF THE MARKET ~10%

TOTAL MARKET ~€1,860 Mill

SEM DISPLAY VIDEO ~49%

Source: Smartclip | Estimates based on Market Monitoring 2018 & IAB Spain Estudio de inversión publicitaria de medios digitales 2018
COMPLETE TECH SUIT

CROSSDEVICE ADVERTISING DISTRIBUTION PLATFORM

ONE-STOP SOLUTION & AUTOMATION

REACH MEASUREMENT & DATA ANALYTICS

Scheduling System
Ad Placement Controlling System
Data Analytics & Visualization
HbbTV Framework
Ad Server Technology
Real-time Decisioning & Delivery
Data Management Platform (DMP)
STRATEGY IN THE INVENTORY STRUCTURE

FLEXIBLE STRUCTURE OF THE INVENTORY TO ADAPT IT TO THE MARKET KPIs

EXCLUSIVITY AGREEMENTS OF GREAT VALUE

- EXCLUSIVITY AGREEMENTS VIDEO FORMATS
- BUYING EXTENSION AUDIENCE
- PROGRAMMATIC

REACH

KPI CLIENT “A”
KPI CLIENT “B”
KPI CLIENT “C”
# OUR ASSETS

## WEB AUDIENCE

- **smartclip**
  - 93% Digital Population Spanish Market
  - +80 Exclusive Sites Premium
  - +200 Media Contracts

- **ATRESMEDIA**
  - Leader Online Entertainment Media
  - 70% Digital Population Spanish Market

## BROADCAST TV HBBTV

- **ATRESMEDIA**
  - Leader Group Comunications Spanish Market
  - Addressable TV Data Crossdevice
  - 22% Householders 4.1 MM Devices Opt In

## OTT APPS & TV ON LINE

- +5MM Householders
  - +30 Entertainment Smart TV Apps

## MANUFACTURERS

- **SAMSUNG Ads**
  - 2.9MM Householder Data ACR

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EUROPE HBBTV

HYBRID BROADBAND BROADCAST TV

Standard Pan-European hybrid television project

Television and web content service via broadband

INTERACTIVE TV EXPERIENCE

- RECOVERY OF TELEVISION (VoD)
- VOTE
- APPs
- SOCIAL NETWORKS
- PERSONALIZED INFORMATION ON THE TV
- GAMES
- WEB NAVIGATION
- TELETEXT AND THE ELECTRONIC PROGRAMMING
- ADVERTISING IPTV
- ADDRESSABLE TV CROSSDEVICE
HBBTV TV SETS IN SPAIN

TV stock
In Spain, there are 37.5 mill. of TV sets

SMART TV with HBBTV
12.7 mill. are Smart TV’s with the HBBTV technology installed

HBBTV 1.5 OR ABOVE
7.3 mill. are Smart TV’s with HBBTV 1.5 or superior, mandatory for receiving advertising

HBBTV 1.5 CONNECTED WITH ATRESMEDIA OPT IN
4.1 mill. are Smart TV’s with HBBTV 1.5 or above, that are connected to the internet, have DTT signal and have accepted the Atresmedia channels’ opt-in

Source: Atresmedia, Cellnex, GFK and European Broadcasting Union 2018
STRATEGIC APPROACH

ONE SOLUTION TO MERGE LINEAR TV WITH DIGITAL OFFERING THE ADVERTISERS THE UNIQUE SELLING PROPOSITION OF CROSSING THE TV AND DIGITAL DATA SETS

DATA CROSSDEVICE PROTECTED IN A WALLED GARDEN

- TV AUDIENCE PLATFORM
- MANUFACTURER SMART TV
- WEB AUDIENCE PLATFORM

- DSP CROSSDEVICE
- DSP CROSSDEVICE
- DSP CROSSDEVICE

- BROADCAST TV
- HBBTV
- OTT TELCOS
- OTT APPS
- MANUFACTURERS
- DIGITAL

smartclip
DATA IS THE NEW OIL

ADDRESSABLE TV
UNIQUE DATA & AD TECH
DSP CROSSDEVICE

NO ACCESS TO TV DATA & AUDIENCE
DATA IS THE NEW OIL

TV DATA SETS

CONSUMPTION
LINEAR TV

HEAVY VIEWERS

MEDIUM VIEWERS

LIGHT VIEWERS

ADVERTISING
LINEAR TV

CONTENT
LINEAR TV

TV PROGRAMMING

SPORTS

HOME

KIDS

SERIES & FILMS

CHANNELS
LINEAR TV

LINEAR TV ADVERTISING

LINEAR TV CONSUMPTION

HEAVY VIEWERS MEDIUM VIEWERS LIGHT VIEWERS
EPRIVACY REGULATION DATA CROSSDEVICE

GENERAL OPT-IN  ANONYMIZED IP  COMPANIES FILTER  HOUSEHOLDS  HOUSEHOLD CLUSTERING  CROSS DEVICE

OPT IN

HASHED

DISCHARGE IPS WITH MORE THAN 5 DEVICES CONNECTED

GEOCLASIFICATION OF HOUSEHOLDS

CLUSTERS OF 5 HOUSEHOLDS

OVERLAB NETWORK SMARTCLIP

EPRIVACY REGULATION

Utilizamos cookies propias para recabar información relativa al uso de los canales de Abesmedia. Esto nos permite medir las audiencias y analizar tus hábitos de consumo televisivo para personalizar el contenido que ofrecemos y mostrarte publicidad adaptada a tus preferencias basándonos en el perfil obtenido. Las cookies nos permiten asimismo asociar los distintos dispositivos que tengas conectados a la red para ofrecerte estos contenidos y publicidad personalizados. Puedes aceptar el uso de cookies clicando en "ACEPTAR" o puedes CONFIGURAR O RECHAZAR la instalación de cookies, así como obtener más información clicando en "CONFIGURAR COOKIES", o en cualquier momento pulsando el botón verde de tu mando a distancia.

ACEPTAR  CONFIGURAR COOKIES
SKIN OVERLAY AND SPOT ON LINEAR TV CONNECTED TVs
DIGITAL SKIN
SPOT AND SKIN OVERLAY ON LINEAR TV

**NUMBER OF CONTACTS OPTIMIZATION**
Individual frequency capping, reminder ads, story telling

**STORY TELLING**
Reminder Ads, Ad Sequencing

**REGIONAL TARGETING**
Cities, states, regions

**DAY AND TIMEZONE**
e.g. Prime time, Access time, weekdays, weekends, etc.

**TARGET GROUPS**
age, gender, interests/categories, tv genres

**INTERACTION**
Click to video, smart tv microsite

**ADSERVER BASED AD DELIVERY IN TV**
EXAMPLE REGIONAL TARGETING

- Flug von Hamburg nach Bodrum ab 119 € • Athen ab 209 € • Malta ab 169 €
- Flug von München nach Rom ab 99 € • Genua ab 129 € • Basel ab 129 €
- Flug von Frankfurt nach Hannover ab 109 € • Budapest ab 139 € • Stockholm ab 139 €
EXAMPLE STORY TELLING

1st CONTACT


2nd CONTACT

Die Probe BahnCard 25: Spart 25% bei jeder Fahrt.

3rd CONTACT

Kostenloses WLAN für alle. Ab sofort im ICE.

- Alternating creative layouts which distinguish different product features or completing a complex product/brand message using contact targeting
- Storytelling additional to the tv spot (also possible without tv spot)
EXAMPLE OF INTERACTION

Switch In XXL mit Yellow Button

Full-Screen Video

Link options:
- Full-screen video (16:9)
- Basic microsite (graphics+video)
- Customized microsite (on request)
ADDRESSABLE TV DYNAMIC SPOT INSERTION

Addressable TV Dynamic Spot Insertion
FUTURE READY: FIRST SPOT REPLACEMENT VIA HBBTV 2.0 IN REALTIME

EIN LINEARES SIGNAL – VIER SPOTS
INDIVIDUELLE ZIELGRUPPEN-ADRESSIERUNG DURCH SPOTAUSTAUSCH
DATA CROSSDEVICE
DESKTOP/SMARTPHONE/TABLET
INCREMENTAL REACH
CROSSDEVICE UNIQUE SOLUTION

ATRESMEDIA

22%
HBBTV HOUSEHOLDS
4.1 MM OPT IN

WEB AUDIENCE PLATFORM

22%
HBBTV HOUSEHOLDS
4.1 MM OPT IN

DIGITAL

WEB AUDIENCE PLATFORM

POTENTIAL REACH
31.7 MM USERS

BROADCAST TV

HBBTV

HBBTV TECHNOLOGY

HBBTV

CROSSDEVICE PROCESS

SPOT LINEAR TV

HBBTV TV CONNECTED

IDENTIFICATION DEVICES RECEIVED SPOT

VIEWERS HAVE SEEN TV SPOT

HEAVY VIEWERS

MEDIUM VIEWERS

LIGHT VIEWERS

VIEWERS HAVE NOT SEEN TV SPOT

ENHANCED TARGETING VALUES TO DIGITAL DEVICES
EXAMPLE OF INCREMENTAL REACH TO LINEAR TELEVISION

CONSTRUCTION OF THE REACH CURVE OF A LINEAR TV CAMPAIGN

Week 1  Week 2  Week 3  Week 4  Week 5

50.9%  65.7%  72.8%  77.1%

Source: Kantar Media. PYB Adults+16 Atresmedia + Mediaset. Campaign 500 GRPs. March 2019
PRE-LAUNCH BENCHMARK CROSSDEVICE ADVERTISING

DISTRIBUTION OF REACH BY AGE COHORTS

X1.8

%Reach medio por parte de edad

IND 18-24  IND 25-34  IND 35-44  IND 45-54  IND 55+

Total TV  Digital exclusive  Crossdevice exclusive
TECHNOLOGY DEVELOPMENTS:
• MEASUREMENT TOOL | VAR
• DATA CROSSDEVICE DMP
• OWN DSP
TOOL FOR REACH EXTENSION MEASUREMENT

Specialized research in crossmedia studies of advertising effectiveness. Leader in market research, research and analysis.

It provides digital marketing data to study the behavior of online users.

Study on the consumption of media in Spain.

Data collection and campaign effectiveness measurement.
SMARTCLIP READY FOR THE FUTURE

MOST RELEVANT CROSS DEVICE DIGITAL ADVERTISING DISTRIBUTION PLATFORM

Drives Audience, Distribution and Monetization at Scale

AUDIENCE SCALE
- Global reach and scale
- Deep user engagement
- Cross-channel targeting

CROSSDEVICE DISTRIBUTION
- Addressable TV
- Connected Smart TV
- OTTs
- Web Audiences

MONETIZATION
- Global sales team
- Rich profile data
- Top 500 Advertisers
- Direct Marketers
THANKS!

THE UNIQUE CROSSDEVICE ADVERTISING PLATFORM