

egta

# ACTIVITY REPORT

MAY 2014

MAY 2015

# TV



# A YEAR IN EGTA: MAY 2014 TO MAY 2015

## WHAT DID YOUR ASSOCIATION DO FOR YOU?

This document is the first part of egta's Activity Report, which aims at giving a clear overview of the numerous and rich activities organised by the team in Brussels. For egta's AGM41, you will therefore be provided with two documents: on the one hand, this paper, giving a description of events and projects carried out by your association (sent a month prior to the Annual General Meeting, as legally required). On the other hand, you will receive during the AGM in Budapest, a brand new version of this report: a set of infographics, which will provide at a glance concrete examples of how a given topic flows through egta's three departments, together with a set of facts and figures about your association. A dynamic oral presentation of these reports will be given during the statutory session on May 21.

### ON THE TV SIDE:

The following topics were central to egta's television activities throughout the past 12 months:

- Creativity in **advertising models and formats**.
- **Monetisation** of content across screens and devices.
- Interaction **with social platforms** and companion devices.
- **Audience measurement across devices, ROI and ad effectiveness**.
- **Promotion of television** as the most effective reach media.
- **Transparency** in trading (role of auditors, relations between market's actors).
- Creativity in **B2B and B2C communication** strategies.
- Understanding the **impact of major online/OTT players**.
- Packaging of **cross media/cross platform advertising offers**.
- Adaptation of **sales houses' structure**.
- Optimisation of **pricing & sales models and strategies**.
- Development of a proper **data strategies**.
- Understanding **automated and programmatic trading** and **real time bidding**.

#### New TV members

**Between May 2014 and May 2015, these TV Sales Houses joined the association:**

*CBC (Canada), Atres (Spain), StarLight Sales (Ukraine), Mega TV (Greece), LNK televizija (Lithuania), Doğuş Group (Turkey), Channel 4 Sales (UK), TV Media Advertising Agency (Kazakhstan) and the complete CME group is now a member since Televísia Markiza (Slovakia), bTV Media Group (Bulgaria), Pro TV (Romania), Nova TV (Croatia), Nova Group (Czech Republic) joined.*

- **In May 2015 the association counts 129 members (87 TV members and 42 Radio members), established in 38 countries in Europe and beyond.**

## Request centre

egta's request centre aims to help you find a benchmark in many of the sectors, related to advertising, that have an impact on your daily business. From egta's last AGM (May 2014) until today (mid-April 2015), egta received 318 requests of which 241 were related to TV, 51 were related to radio and 26 were related to cross media and/or other media.

➤ **From 2014 to 2015 YTD, this represents an increase of almost 50%. This means more than one request per working day.**

## Regular publications (TV)

- **egtabites** : 21 ideas worth sharing
- **21 Press reviews** – a selection of relevant TV advertising-related press articles from around the world
- **EU Focus**: 5 detailed updates on legal issues affecting the advertising business
- **Other Regulatory updates**: 15
- **New! egta insights** : Topical briefs on relevant TV subjects - to disseminate knowledge and raise awareness. After an introductory edition explaining the concept, the 1<sup>st</sup> edition was published in March 2015 and gave a European perspective on over-the-top television services, whilst the 2<sup>nd</sup> edition (released at the AGM in May 2015) will focus on the latest developments in audio-visual audience measurement.

## Special publications

- **egta's Business Directory**: one of egta's greatest strengths lies in its extensive network of members, built up over 40 years. Based on this insight, egta published in May 2014 a Business Directory, consisting of 126 members companies' profiles, featuring an overview of their TV/Radio activities, as well as a list of the top ten executives in charge of key departments within their sales houses. An update of this publication has been published for the 41<sup>st</sup> AGM and is soon to be available on egta's new website (in the Members' Room).
- Following up the *TV Pricing & Sales methods, today and tomorrow* book published in May 2014, egta has decided to author a new publication titled ***Automated & Programmatic Marketing: an egta publication on data-driven advertising sales for television and radio***. With the help of automated and programmatic trading, TV broadcasters have the possibility to offer advertisers more accurate targeting opportunities, hence better ROI, but also to better monetise their video inventory. While those technologies are widely applied for display advertising sales, they are at their early stage with regards to video inventory and at an even earlier stage when it comes to linear TV inventory. However, the industry is in agreement to say that it will come, sooner or later. This guidebook – which will be released on the occasion of the Budapest AGM – aims at giving you a better understanding of automated and programmatic trading, from basic definitions to the key development and success factors, through the different types of data, the legal issues and pitfalls to avoid for broadcasters. The publication will also include concrete cases from Europe and beyond. Much of the content is provided by various experts, both egta members and external partners, which we collected during a series of interviews.
- **EU Regulatory issue briefs on audiovisual advertising**: these were designed for new Members of the European Parliament and European Commission in summer 2014. The objective of these briefs was to provide a summary of our key policy areas for the next 5 years including the

current legislative status on each issue, the challenges ahead and egta's position on each one. The topics covered by these briefs include responsible commercial communications for alcoholic beverages; the AVMSD and the future of broadcasting regulation; food and beverage advertising, responsible advertising to children; data protection and online behavioural advertising; commercial communications for gambling services; and electronic cigarettes.

## Training

**ESEA:** The 6<sup>th</sup> and 7<sup>th</sup> edition of egta's senior executives' academy were once more a great success.

- Summer edition 2014: 22 participants, 3 mentors and 13 speakers over three days covering the topic: *"How to best sell television advertising in an era of 'anytime, anywhere, any device' and promote Television as the heart of multi-screening experiences"*
- Winter edition 2015: 19 participants, 3 mentors and 10 speakers over three days covering the topic: *"Building cross-platform offers that answer clients' demand for more creativity, transparency, efficiency and brand integration."*

## Events

| Conference (date, venue, host) – in chronological order  | No. of participants          | No. of speakers                |
|--|------------------------------|--------------------------------|
| <b>AGM40</b> (incl. TV, Radio & Joint sessions)<br>22-23 May 2014 – Vienna (Austria)<br><u>Hosted by:</u> ORF Enterprise   | 152<br>(TV session)          | 18<br>(TV session)             |
| <b>Summer Senior Executive's Academy</b><br>22-25 June 2014 – Brussels (Belgium)   | 24                           | 17                             |
| <b>Marketing &amp; Sales Directors' Meeting</b><br>2 October 2014 – Reykjavík (Iceland)<br><u>Hosted by:</u> RÚV   | 84                           | 21                             |
| <b>European Affairs Group</b><br>2 October 2014 – Brussels (Belgium)   | 15                           | n.a.                           |
| <b>IT Users' Fair</b><br>10 December 2014 – Brussels (Belgium)   | 76                           | 9                              |
| <b>Winter Senior Executive's Academy</b><br>18-21 January 2015 – Brussels (Belgium)  | 19                           | 13                             |
| <b>Market Intelligence Meeting</b> (incl. TV & Radio sessions)<br>29 January 2015 – Vienna (Austria)<br><u>Hosted by:</u> IP Austria<br>Incl. <b>AV Currency Working Group</b> | 85<br>(TV session)<br><br>16 | 18<br>(TV session)<br><br>n.a. |
| <b>European Affairs Group</b><br>19 February - Brussels  | 23                           | n.a.                           |
| <b>DigitalNext Meeting</b><br>19 March 2015 – Helsinki (Finland)<br><u>Hosted by:</u> MTV Oy   | 84                           | 17                             |
| <b>AV Currency Working Group</b><br>25 March 2015 – Brussels (Belgium)   | 35                           | 6                              |
| <b>Top Management Visit</b><br>23 April 2015 – London (United Kingdom)<br><u>Organised in collaboration with:</u> Thinkbox   | 43                           | n.a.                           |
| <b>TOTAL</b>   | <b>656</b>                   | <b>119</b>                     |

For every meeting, egta also produces a “post event report”, as well as gives its members access to the presentations given, in PDF, and in a filmed video format (available respectively on the egtanet and on REPLAY). Please note that exceptions to this rule can be made for Academies and some working groups.

### Partners' events

The egta team regularly attends partners' events and meetings to stay abreast with new developments in the TV industry.

- **Examples:** Festival of Media, TV Connect, Connected TV Summit, Future TV Advertising Forum, Real-Time Advertising Summit, asi TV Research Symposium, Future of Broadcasting, etc.
- **Future TV Advertising Forum:** egta moderated a panel on “Branded Entertainment and Format Innovations”.
- **Festival of Media:** egta facilitated speaking contributions by major member companies to represent broadcaster's perspective at this event.

### World TV Day

On 21 November 2014, egta once again joined forces with ACT and EBU to celebrate World Television Day (as declared by the United Nations in 1996). The goal was to raise both industry and public awareness around the key role that television plays in shaping modern society and to emphasise its crucial contribution to the global economy, politics, education and entertainment. egta was the coordinator of this project and built its work around two main pillars made available on [www.worldtelevisionday.tv](http://www.worldtelevisionday.tv): the collection of additional quotes from celebrities in favour of television and the production of a 30-second promotional clip about the power of TV. With the support of broadcasters around the world, this clip called “We Love TV” was broadcast by more than 75 channels on the 21<sup>st</sup> of November and was viewed by approximately 100 million people around the globe. It entailed a call to action, asking viewers to share their favourite TV moments on social networks with the hashtag #WeLoveTV or #WorldTVDay. The visibility of World TV Day online during this week was remarkable, and the press also widely covered the topic.

### TV databases

The databases gather information from 36 markets about advertising statistics, pricing and sales policies, audiovisual audience measurement status and the regulatory framework in place in egta member countries. It is updated and modified every year in July to better answer members' needs. Most of the information is available both online and offline and can be downloaded (PDF or XLS). Please note that the 2015 format will be lighter and more user-friendly.

### Special projects

#### ➤ Pan-European platform for the promotion of television- PEPP TV

Based on the realisation that whereas national TV trade associations are doing a great job at national level, the TV industry as a whole is not very efficient at communicating about TV's unique appeal, effectiveness, or at providing consolidated European figures (neither proactively, nor reactively), egta joined forces with other national and European industry associations in an attempt to better structure all communication efforts around television and to improve the accessibility of consolidated facts and figures about TV. In 2014, this group published four press releases, which gained considerable coverage both in national and international specialised press. You can find more information about this group on [www.pepp.tv](http://www.pepp.tv)

➤ **AV currency and audience measurement working group**

Last May 2014, egta released its *Guidelines for the future of audiovisual measurement* that reflect the broadcasters' point of view and take into account the technological developments that influence the media environment and viewers' viewing habits. egta is now working on how to best implement hybrid audience measurement, work that is still in progress as no country, so far, has fully implemented such a measurement.

➤ **A Top Management Visits Cycle**

This series of trips reserved for senior management only, aims at benchmarking your own TV market against some of the most advanced ones. The cycle kicked off in April 2015, in London, with a meeting organised in collaboration with Thinkbox where about 40 senior representatives from European TV sales houses discussed the future of television advertising with UK's largest sales houses. egta is planning to organise other visits in the course of the year, namely in France, Germany and the Nordics. Dates will be communicated in due course.

**A new website and visual identity:**

**To be revealed at the AGM 2015:** egta invested on a rebranding and a fresh image to position egta as business-oriented, moving away from the status of a *nice-to-belong-to* association to that of a *must-have* business partner:

- a. The morphing of the logo, which started at egta's 40th anniversary ended with a fresh new look in time for this year's AGM.
- b. The project for a new website and unique platform came to fruition. The new platforms will be launched at the AGM in Budapest and be further built upon over the summer 2015.

**Focus on the new website and platforms:**

- **Objectives:** our objective is to further consolidate egta's online tools that were developed over the years. This long-term work is part of wider communication project, aimed at improving the understating of egta's services among its members.
- **The key enhancements and added features include:**
  - The refreshed users' interface will give a better image of egta, reflecting the active and modern role of the association as a key business partner for all its members.
  - The new design: in order to meet the standards of the multi-screen world, egta opted for a responsive web design that will ensure that all information published on its new website can easily travel in the multi-device environment.
  - The modernised structure will increase the visibility of presented information and improve users' experience.
  - The improved search functions (based on tags, keywords and categories) and navigation systems are being designed to streamline members' experiences in egta's online universe;
  - The modernised catch-up platform will provide a unified access to presentations and videos from egta events.

Information currently stored on the egtanet will be integrated in different secured parts of the new website. This crucial modification aims at allowing cross-platform search based on specific topics.

## Decision making bodies

Following elections by the Annual General Meeting in Vienna in May 2014, the egta Board composition was composed of 21 members (in alphabetical order):

Claudio Anselmi (Publitalia '80, Italy), Fabrice Mollier (TF1 Publicité, France), Gunnar Petterson (MTG Viasat Group), Wim Frison (VAR, Belgium), Yves Gérard (RMB, Belgium), Lazaro Garcia Herrero (Publispaña, Spain), Max Hamberg (TV4, Sweden), Malte Hildebrandt (SevenOne Media, Germany), Claudia Ion (Dogan Media, Romania), Jan Isenbart (IP Deutschland, Germany), Ludger Lausberg (BRmedia, Germany), Paolo Lutteri (Rai Pubblicità, Italy), Peter Mulder (SBS Broadcasting, The Netherlands), Geraldine O'Leary (RTÉ, Ireland), Sergey Piskarev (Gazprom-Media, Russia), Franz Prenner (ORF-Enterprise, Austria), Heikki Rotko (MTV, Finland), Florian Ruckert (RMS, Germany), Martin Schneider (publisuisse, Switzerland), Erkin Zincidi (Doğan Media, Turkey), Walter Zinggl (IP Austria). Non-European observer to the Board: Jean Mongeau (Radio Canada & CBC, Canada) and Khalik Sherrif (etv).

The Executive Committee has since then been composed of: Franz Prenner (President), Heikki Rotko (Past President), Jan Isenbart (President Elect), Martin Schneider (Vice-President), Sergey Piskarev (Vice-President), Florian Ruckert (Vice-President), Paolo Lutteri (Vice-President) and Wim Frison (Treasurer).

### ➤ Past board meetings

- 22 May 2014, Vienna, back to back with the Annual General Meeting.
- 3 October 2014, Reykjavik, back to back with the Annual TV Marketing & Sales Directors Meeting.
- 30 January 2015, Vienna, back to back with the Annual Market Intelligence Meeting (MIM).
- Most of the Board members were also present on 23 April at the first edition of the Top Management Visit Cycle in London.



## FUTURE ACTION PLAN – TV DEPARTMENT

### Upcoming projects in 2015-2016 for the TV department

- **Promotion of TV:** with the objective to strongly and consistently promote television across Europe, egta is supporting some of its members in organising national TV days by inviting knowledgeable international speakers. Belgium, Sweden and France will each organise their own events for the first time in 2015, gathering all national broadcasters with the same unique aim: to prove to agencies and advertisers that TV is thriving!
- **Study trip to New-York:** In order to get inspiration from US television networks and various TV industry players, egta will take 30 senior management people to New-York for a 5 days study trip, from 26<sup>th</sup> to 30<sup>th</sup> October 2015. Note that, due to high interest from our members, registrations for this event are already closed.
- The recurrent **4 annual meetings** – Market Intelligence, DigitalNext, Annual General Meeting, Marketing & Sales Directors.
- **Quarterly European Affairs Group Meetings.**
- **Two editions of the Senior Executive's Academy**, in June 2015 and January 2016.
- **Senior executive's working groups**, exclusively for Board members and CEOs of egta member sales houses to discuss strategic issues touching decision makers.
- **Topical workshops** and **working groups** targeted to members' needs.
- **egta insight** on the challenges and opportunities originating from the **revision of the Audiovisual Media Services Directive.**
- **EU regulatory issue brief** on 'must-carry'.

