



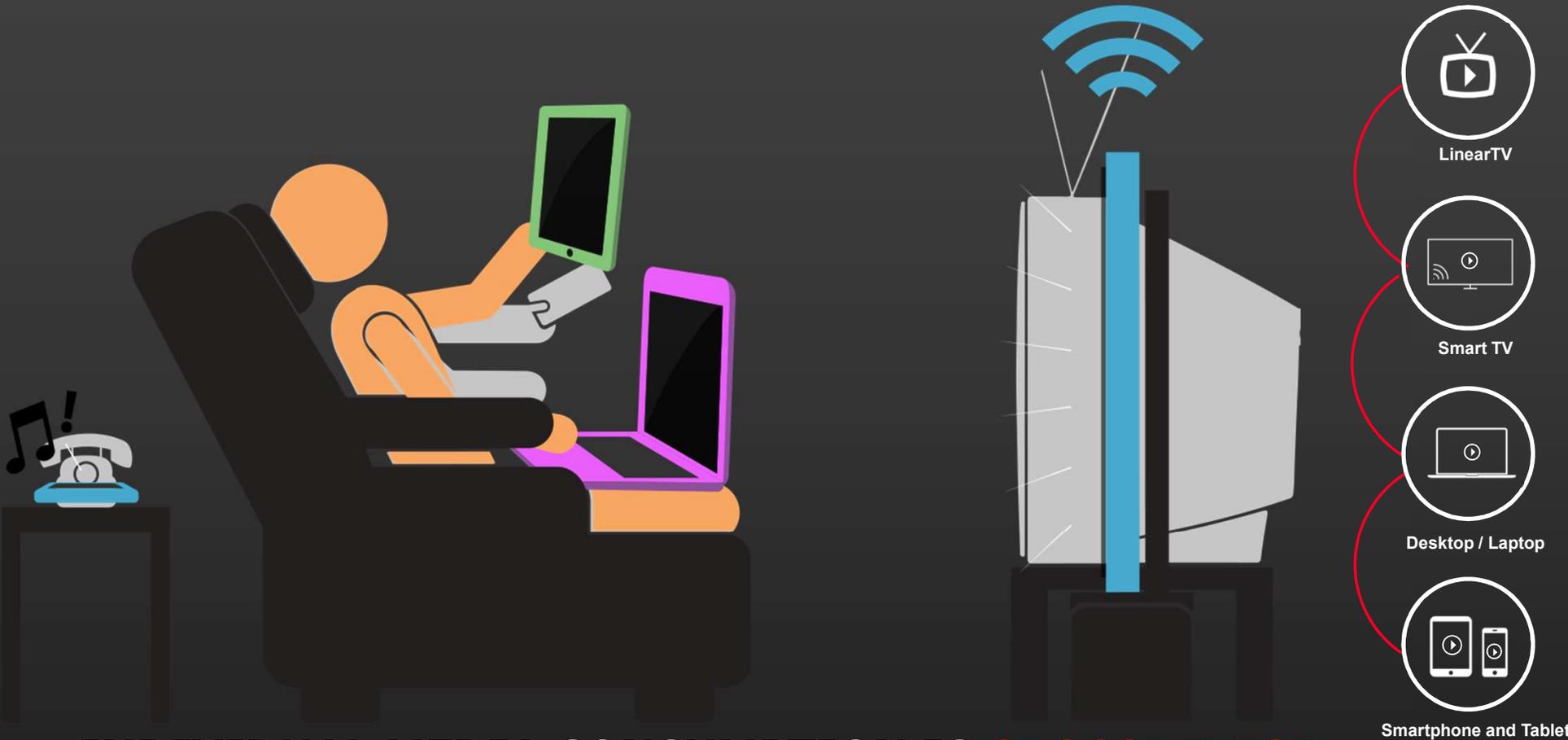
 smartclip

**THE UNIQUE CROSSDEVICE ADVERTISING PLATFORM**

ATRESMEDIA



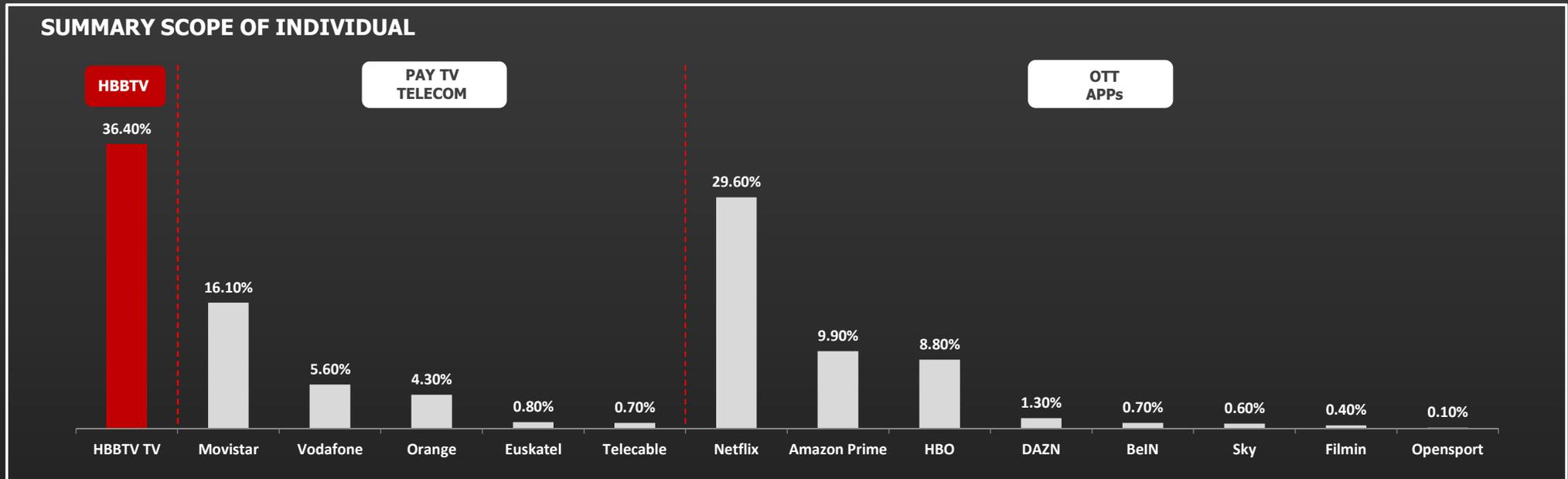
# THE MEDIA PARADIGM IS CHANGING



INDIVIDUAL MEDIA CONSUMPTION IS **CROSSDEVICE**

# DIGITAL TELEVISION LANDSCAPE

**57%** OF HOUSEHOLDS  
CONNECTS THE SMART TV  
TO INTERNET



# DIGITAL TELEVISION LANDSCAPE

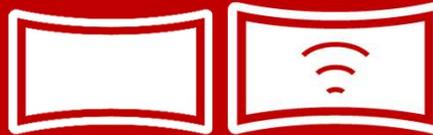
Linear TV



7%

OF ACTIVE TVs

Linear TV & OTT



88%

OF ACTIVE TVs

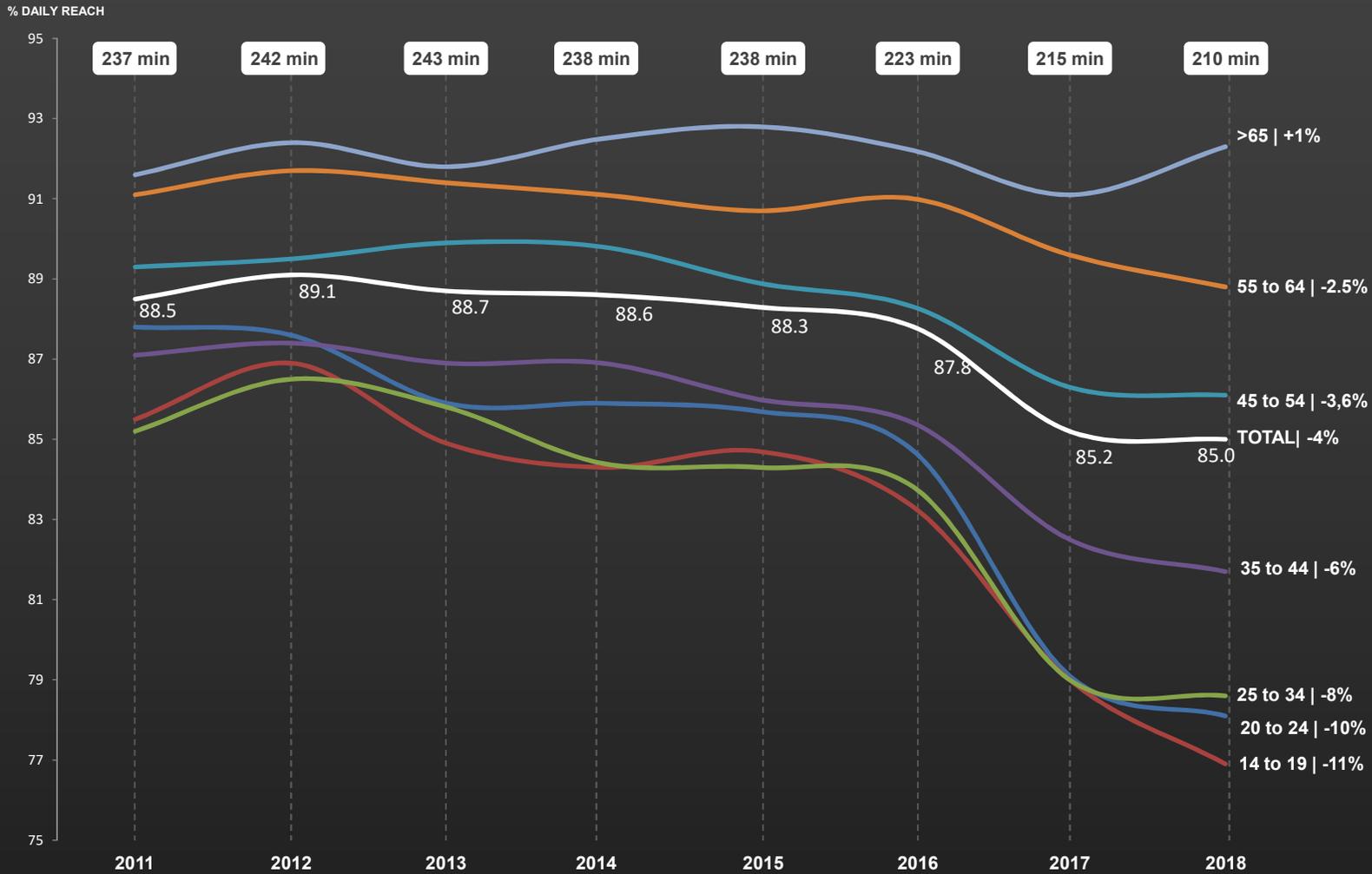
OTT



6%

OF ACTIVE TVs

# CHANGES IN LINEAR TV CONSUMPTION



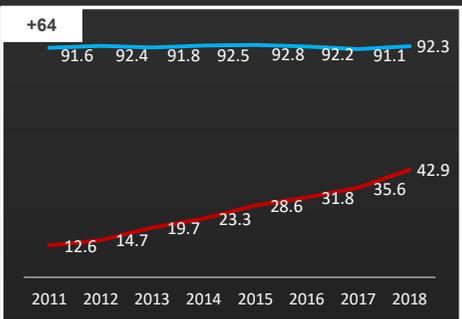
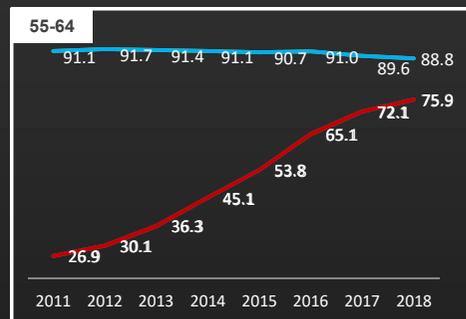
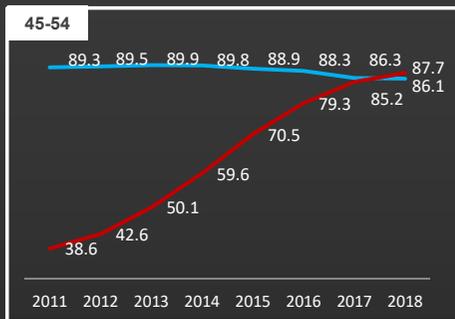
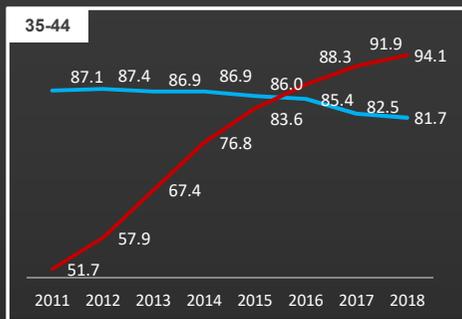
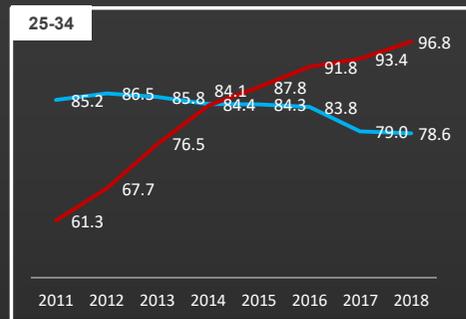
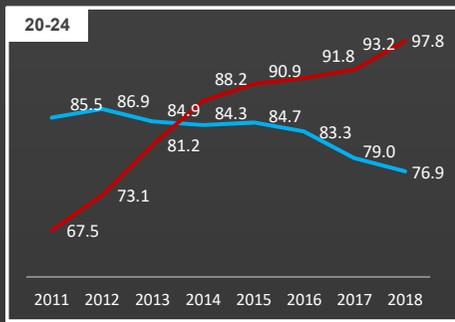
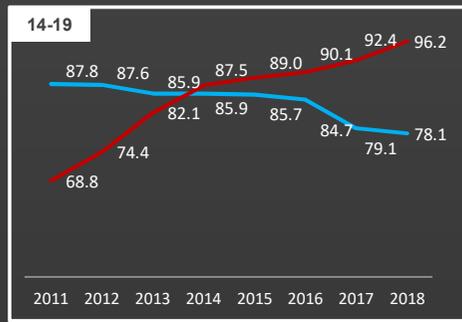
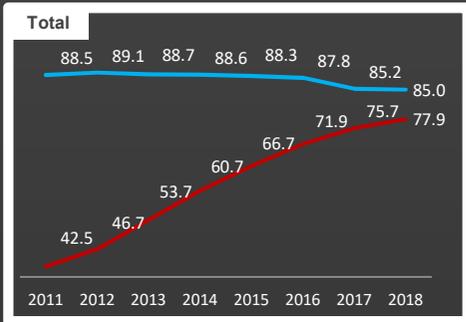
**IN 8 YEARS**

**- 11% TIME**

**- 4% REACH**

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

# INTERNET AND TV ARE CONVERGING



## REACH

■ TELEVISION ■ INTERNET

IN THE LAST 8 YEARS

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

TV AND DIGITAL WILL BE AT THE CENTER

# DIGITAL VIDEO AND TV CONVERGENCE

# 79% OF SPANISH POPULATION WATCHES ONLINE VIDEO

## ONLINE VIDEO CONSUMPTION BY DEVICE

DESKTOP/LAPTOP



83%

MOBILE



61%

SMART TV



38%

TABLET



34%

2<sup>hs</sup>40'

AVERAGE PER PERSON AND DAY

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)<sup>1</sup>

Online video consumption  
( Per day/viewer)<sup>2</sup>

**3hs30' + 2hs40'**



**CONSUMPTION OF THE SAME CONTENT  
IN DIFFERENT PERIODS IN DIFFERENT  
DEVICES**

**SECOND SCREEN  
USE OF MULTIPLE SCREENS  
SIMULTANEOUSLY, MAINLY MOBILE  
SCREEN**

Sources:

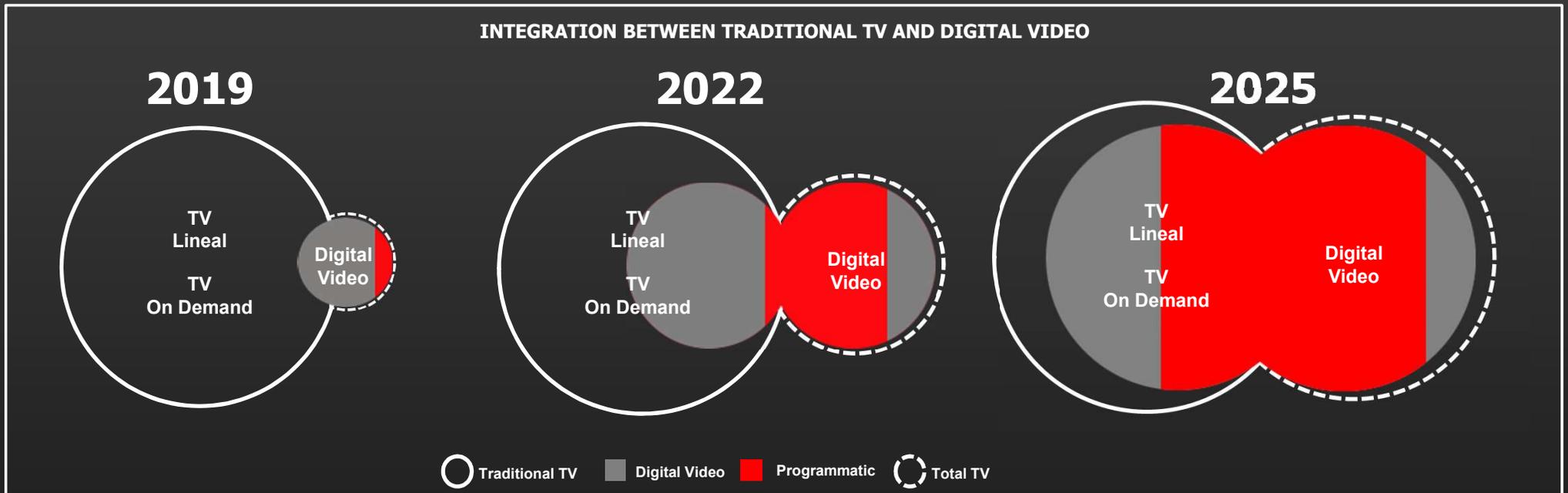
1. Consumption lineal TV : Kantar Media 2018. Population: Total Spain.

2. Consumption online video : Estudio Video Online IAB Spain 2018. Population: Online video viewers between 16-65 yrs old

# MERGE OF TV AND DIGITAL VIDEO

# ADVANCED TV

## THE OVERALL TV MARKET WILL BE BIGGER THAN EVER



# THIS IS THE CHALLENGE

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

Off Line | Mass Media      Reach



**85%**  
SPANISH POPULATION  
1# MEDIA

---

Reduced number of advertising players  
Concentrated audience



Local and thematic TV's

---

Commercial Model

**38.6%**  
Advertising Investment

**GRP**

**VIDEO**  
Standardization of formats

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

Digital      Reach



**78%**  
SPANISH POPULATION  
2# MEDIA

---

Big number of advertising players  
Disaggregated audience

- Televisions
- Editorial Groups
- Magazines
- Radios
- Social Networks
- Native Media
- Blogs
- Etc.

---

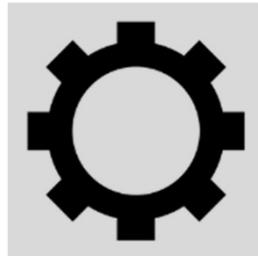
Commercial Model

**31.6%**  
Advertising Investment

**CPM, CPC,  
CPV, CPL,  
...**

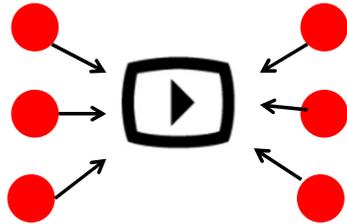
**MEDIA INTEGRATION** 

Digital + Mass Media

**MULTIDEVICE MULTIFORMAT**      **WALLED GARDEN DATA TV**

---



**AUDIENCE**

---

Commercial Model

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

# HOW IS SMARTCLIP POSITIONED FOR THE CHALLENGE?



+120 EMPLOYEES



+7 OFFICES



SMARTCLIP SPAIN  
AND LATAM

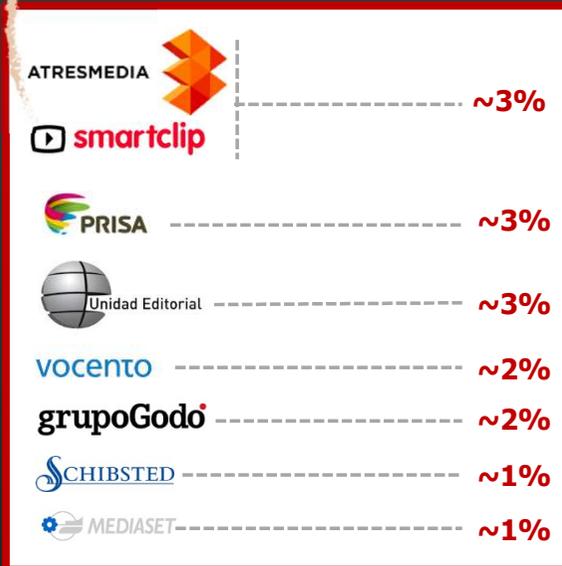


BACKBONE  
TECHNOLOGY

# SMARTCLIP SPAIN: POSITIONING

# #3

IN THE SPANISH MARKET  
~€50 Mill combined



**SEM** Google  
~98%

~51%

SEM OTHERS  
~2%

**DISPLAY VIDEO** Google

~17%



~6%

**MAIN INDEPENDENT PLAYERS**

~16%

REST OF THE MARKET

~10%

TOTAL SEM  
~€950 Mill

~68% TOTAL Google

TOTAL DISPLAY VIDEO  
~€910 Mill

~49%

TOTAL MARKET  
~€1,860 Mill

SEM DISPLAY VIDEO

# COMPLETE TECH SUIT



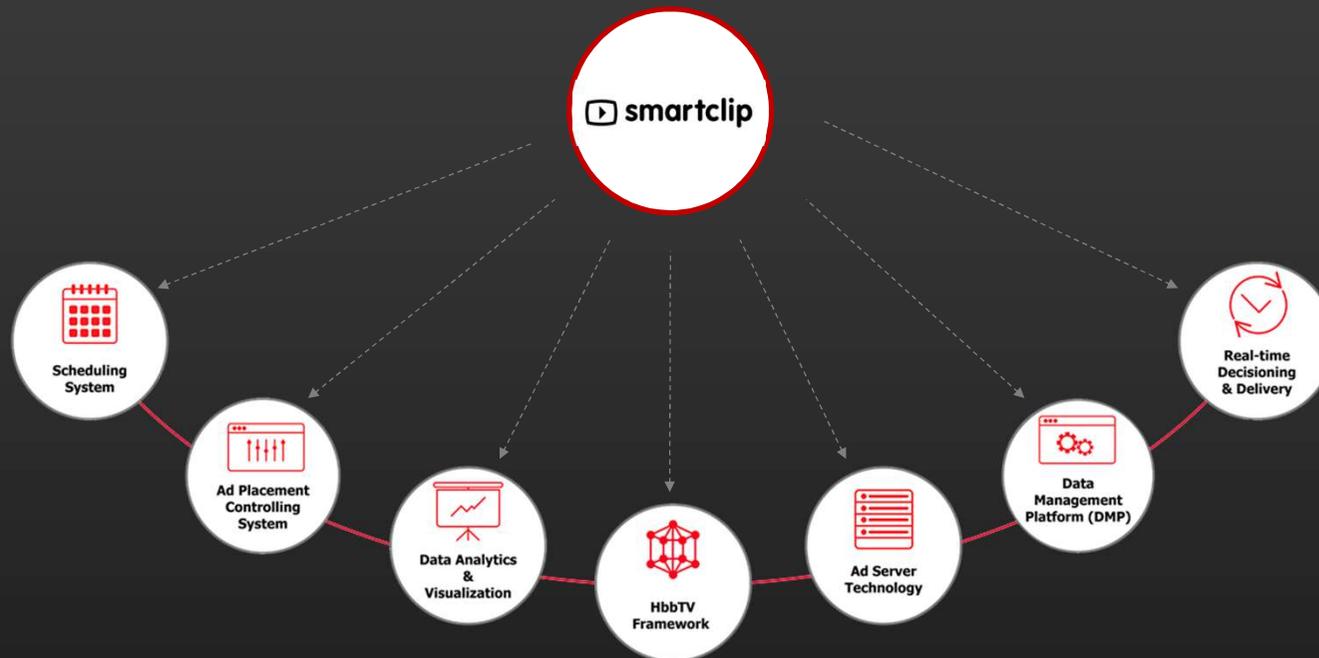
ONE-STOP SOLUTION & AUTOMATION



CROSSDEVICE ADVERTISING DISTRIBUTION PLATFORM



REACH MEASUREMENT & DATA ANALYTICS



# SPECIALISTS IN VIDEO ONLINE DISTRIBUTION

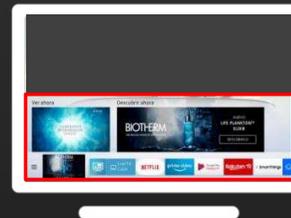
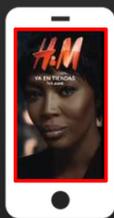
MULTISCREEN

GLOBAL  
Strategy



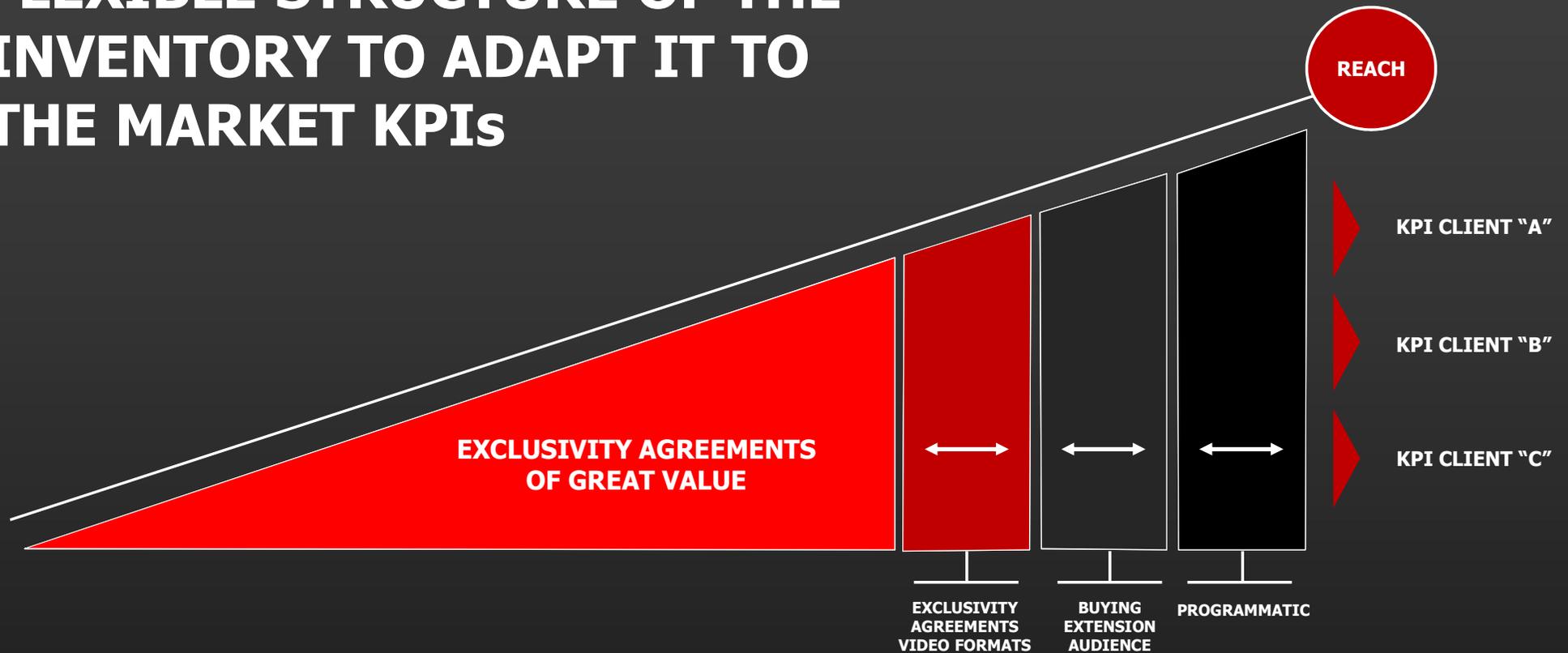
GLOBAL  
Reach

MULTIFORMAT



# STRATEGY IN THE INVENTORY STRUCTURE

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



# OUR ASSETS

## WEB AUDIENCE



**93%**  
DIGITAL POPULATION  
SPANISH MARKET

**+80**  
EXCLUSIVE  
SITES PREMIUM

**+200**  
MEDIA CONTRACTS



**LEADER ONLINE**  
ENTERTAINMENT MEDIA

**70%**  
DIGITAL POPULATION  
SPANISH MARKET

## BROADCAST TV HBBTV

ATRESMEDIA  

**LEADER**  
GROUP COMMUNICATIONS  
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



**dailymotion**



**flooxer**



**CANAL COCINA**

## MANUFACTURERS

SAMSUNG  
**Ads** 

**2.9MM**  
HOUSEHOLDER  
DATA ACR

# 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



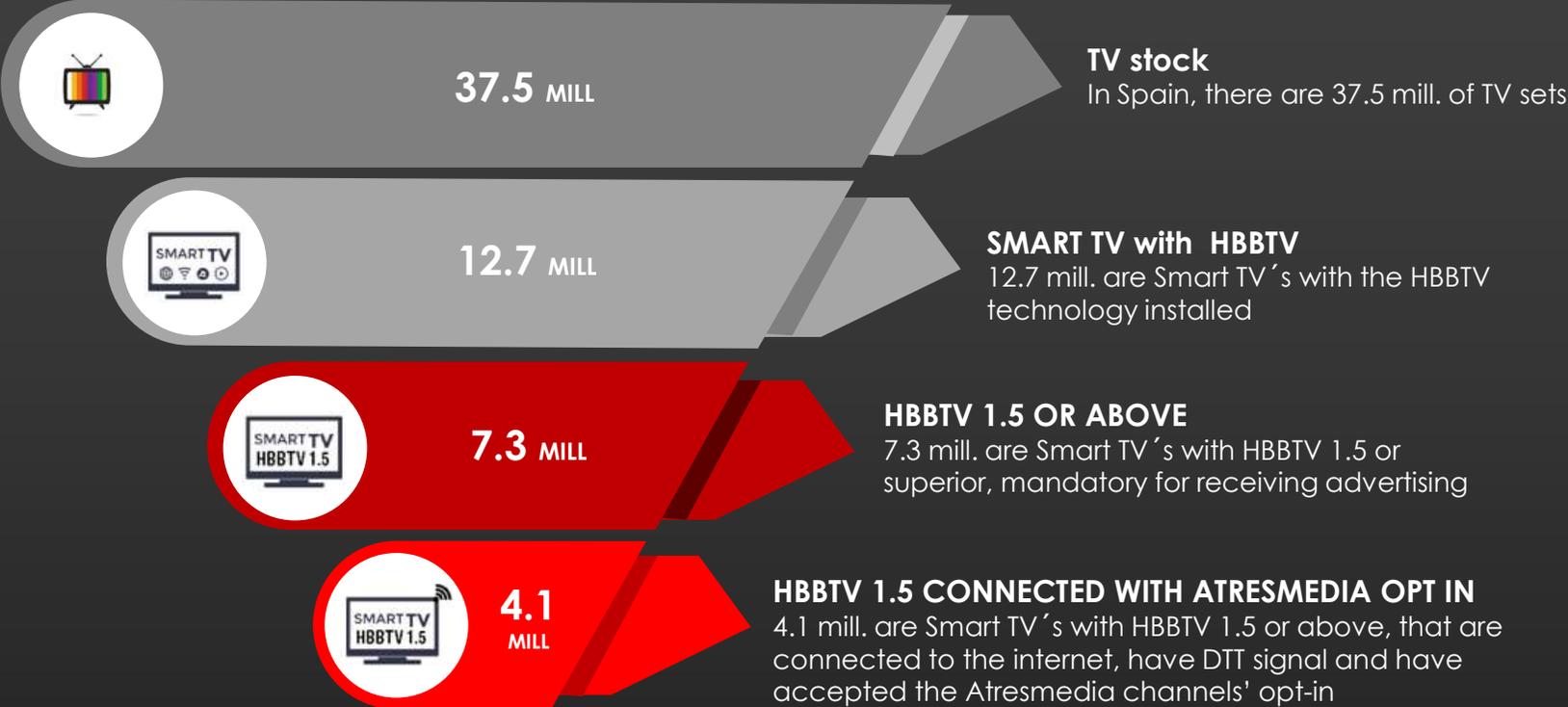
TELETEXT AND THE ELECTRONIC PROGRAMMING

ADVERTISING IPTV



ADDRESSABLE TV CROSSDEVICE

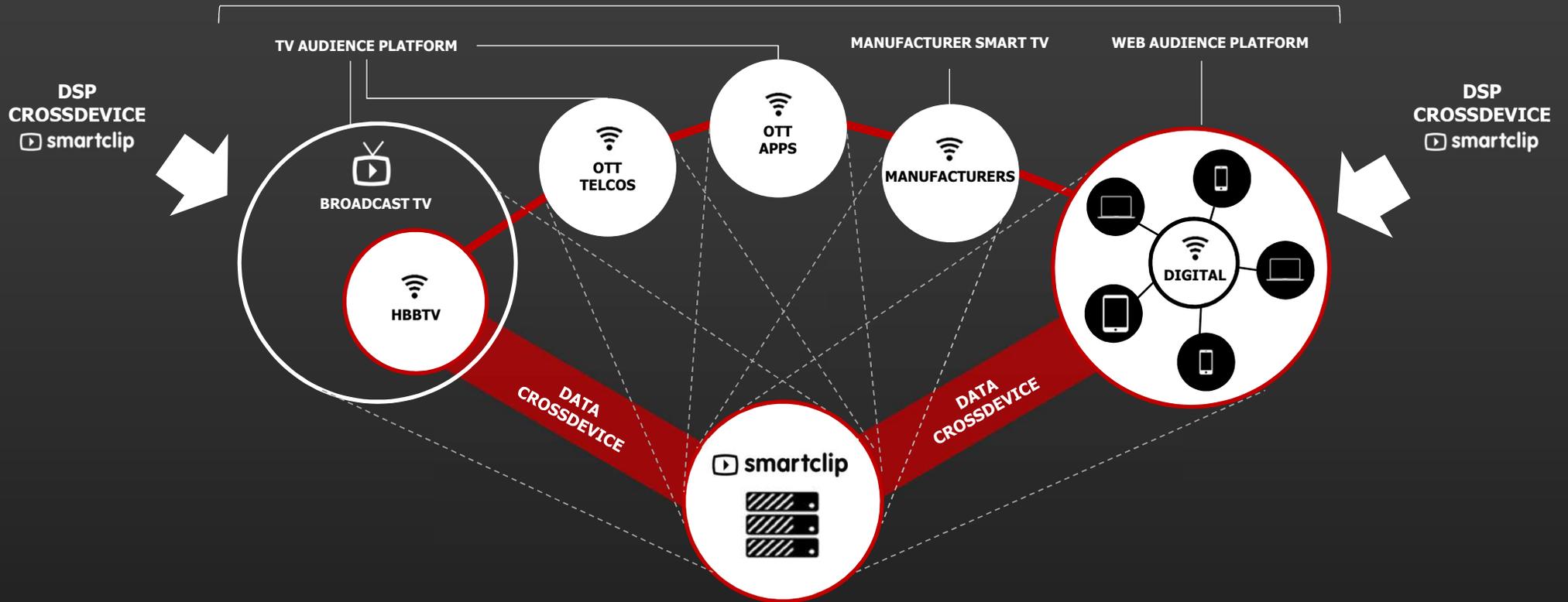
# HBBTV TV SETS IN SPAIN



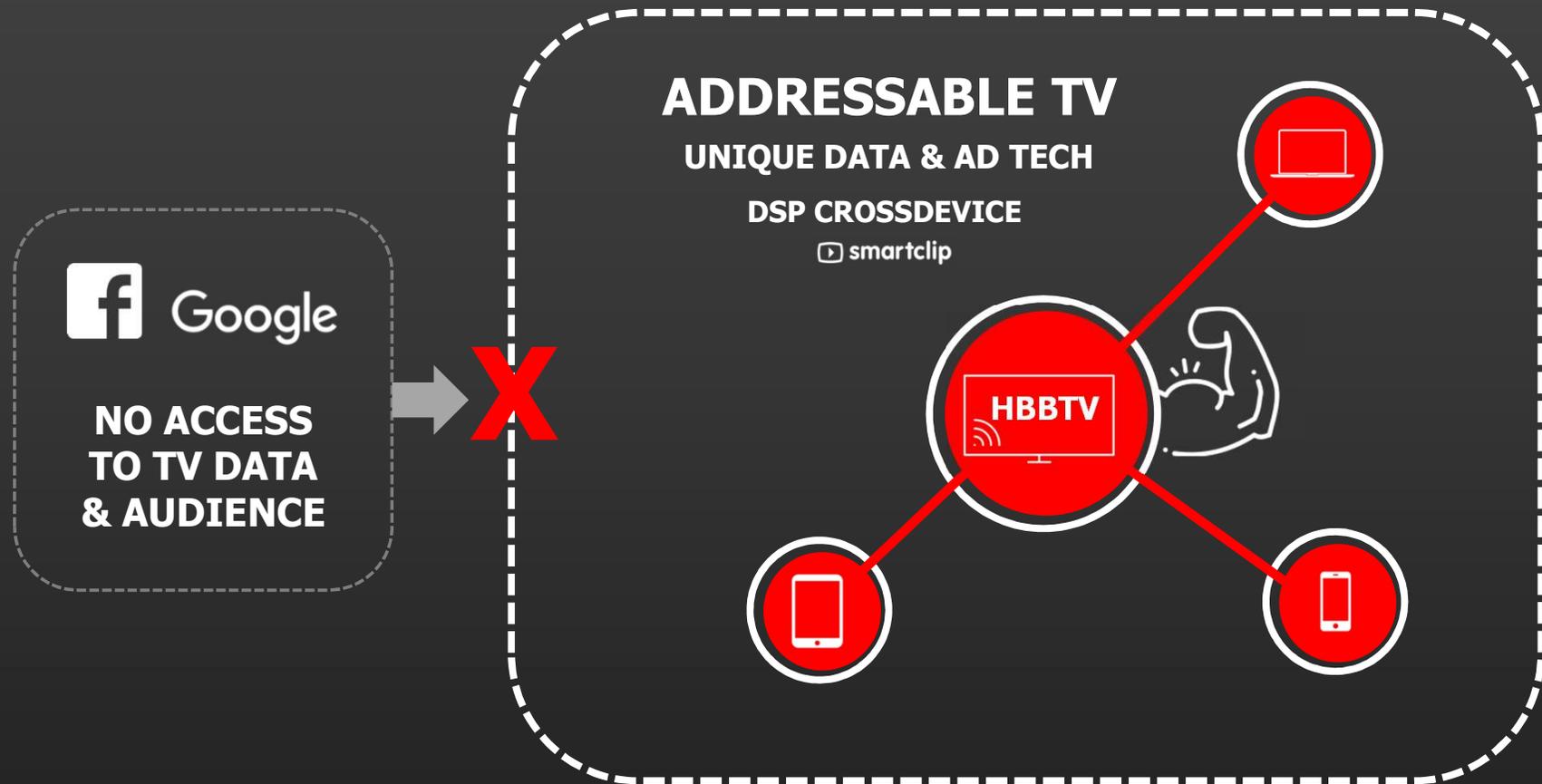
# STRATEGIC APPROACH

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



# DATA IS THE NEW OIL



# TV DATA SETS



**DATA  
IS THE  
NEW OIL**

## 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



neox

NOVA

MEGA



# EPRIVACY REGULATION DATA CROSSDEVICE

GENERAL OPT-IN

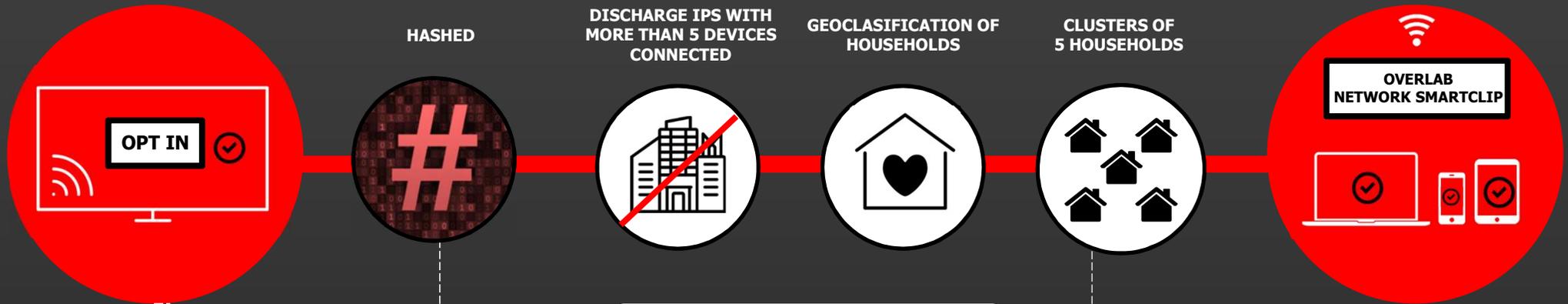
ANONYMIZED IP

COMPANIES FILTER

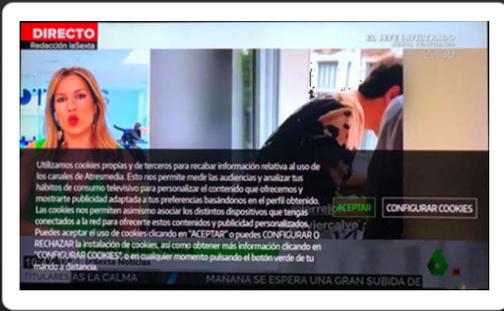
HOUSEHOLDS

HOUSEHOLD CLUSTERING

CROSS DEVICE



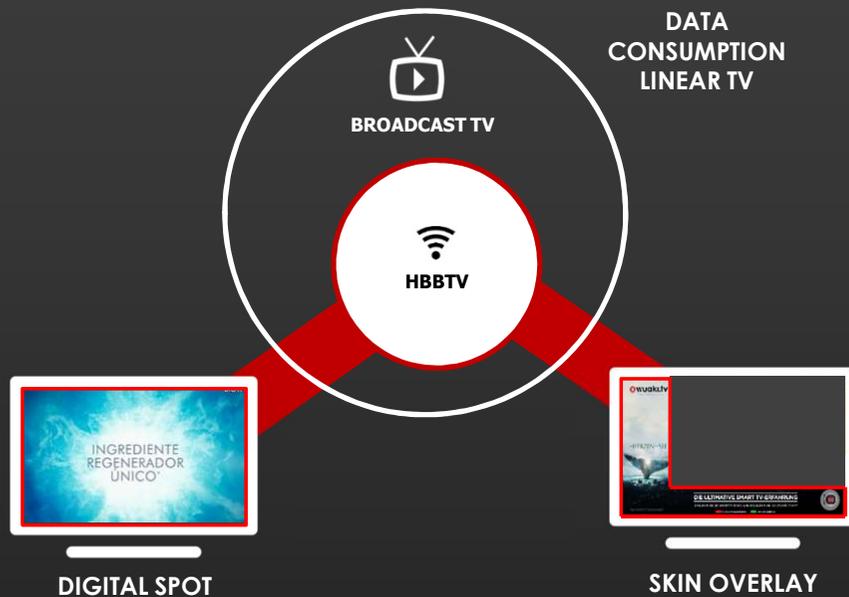
**EPRIVACY REGULATION**



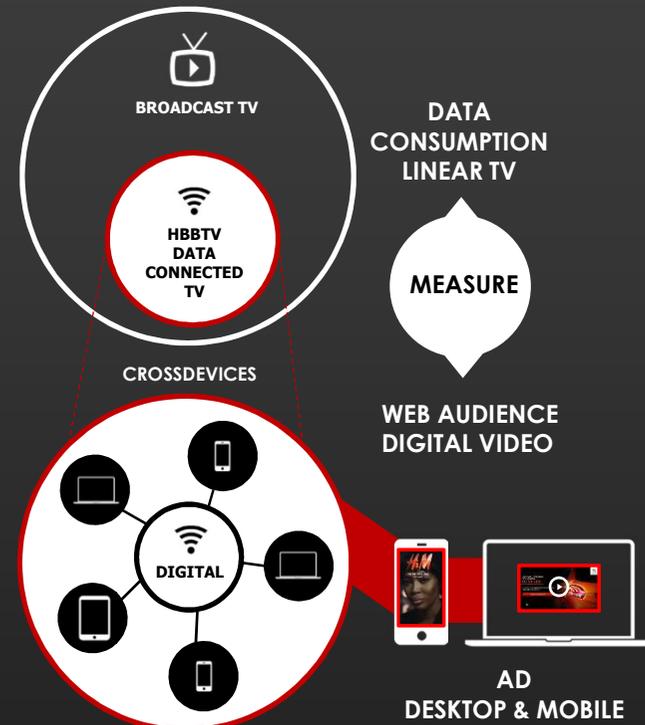
Utilizamos cookies propias para recabar información relativa al uso de los canales de Atresmedia. Esto nos permite medir las audiencias y analizar tus hábitos de consumo televisivo para personalizar el contenido que ofrecemos y mostrarte publicidad adaptada a tus preferencias basándonos en el perfil 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.

# ADDRESSABLE TV SOLUTIONS

## SKIN OVERLAY AND SPOT ON LINEAR TV CONNECTED TVs



## DATA CROSSDEVICE DESKTOP/SMARTPHONE/TABLET



# ADDRESSABLE TV SOLUTIONS

**SKIN OVERLAY AND SPOT  
ON LINEAR TV CONNECTED TVs**

# DIGITAL SKIN

**PUBLICIDAD**  
POLÍTICA DE PRIVACIDAD

**Nº1 EN VENTAS\***



**GRACIAS A MILES DE MUJERES COMO TÚ** **OLAY**

\*OLAY REGENERIST 3 ÁREAS DÍA, NÚMERO 1 EN VALOR VENTAS EN PERFUMERÍAS, GRANDES ALMACENES E HIPERMERCADOS, SEGÚN DATOS NIELSEN DE JUNIO 2018 A JUNIO 2019

**PUBLICIDAD**  
POLÍTICA DE PRIVACIDAD



**el HORMI GUERO 3.0**

**oh&s SUPRÊME**  
CON ACEITE DE ARGÁN

# SPOT AND SKIN OVERLAY ON LINEAR TV

## NUMBER OF CONTACTS OPTIMIZATION

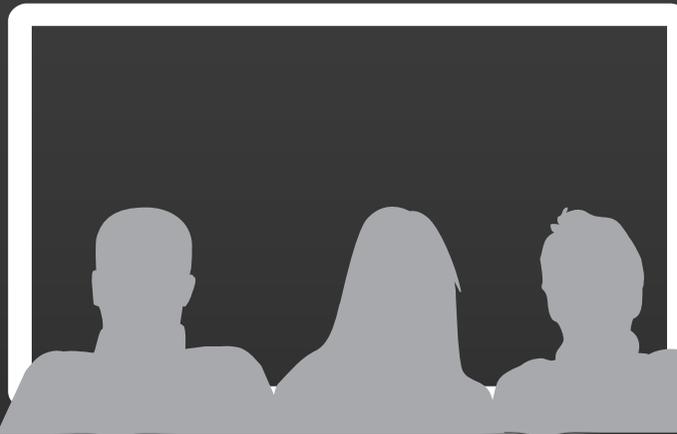
Individual frequency capping, reminder ads, story telling

## 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

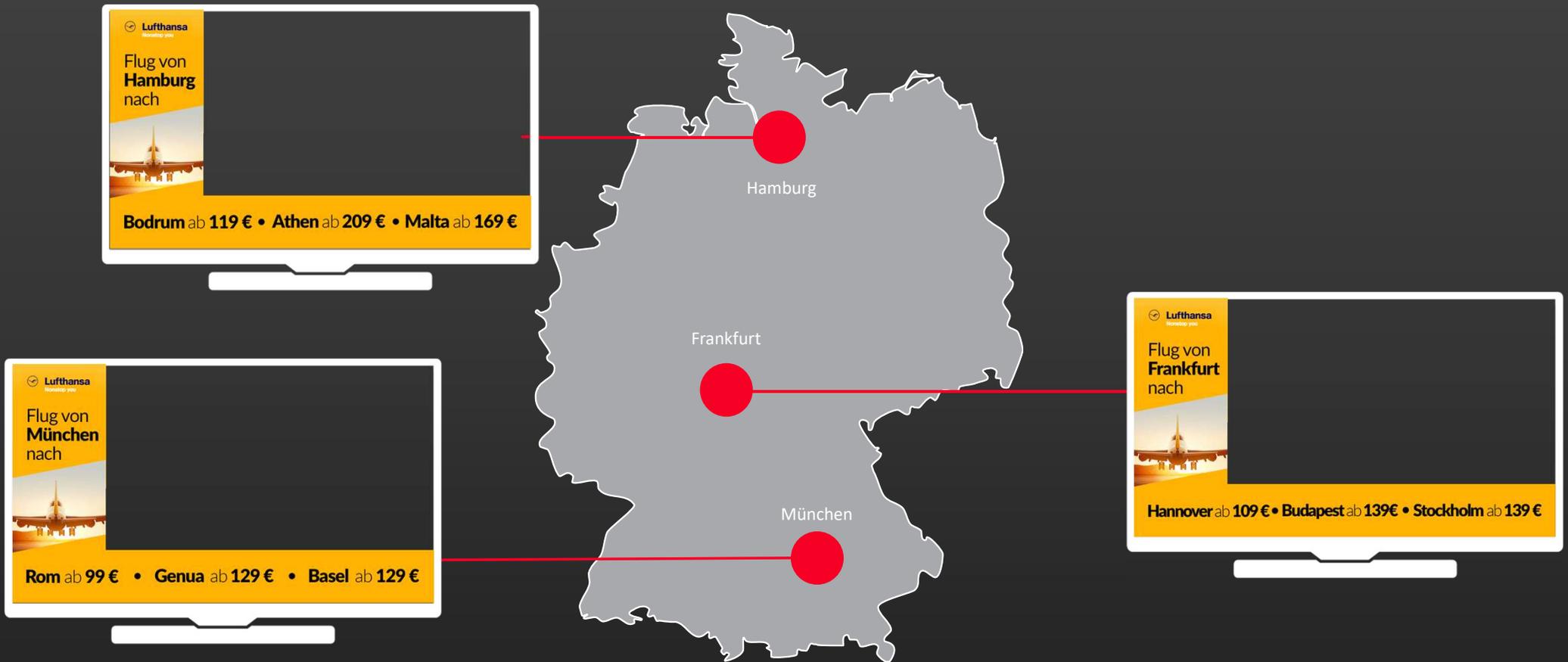
## INTERACTION

Click to video, smart tv microsite



**ADSERVER BASED  
AD DELIVERY IN TV**

# EXAMPLE REGIONAL TARGETING



# EXAMPLE STORY TELLING

1st CONTACT

**DB BAHN**

Unterwegs ganz wie zu Hause fühlen.  
Mit dem Sparpreis ab 29 Euro.

2nd CONTACT

**DB BAHN**

jetzt nur **16** Euro

Probe BahnCard **25**

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

3rd CONTACT

**DB BAHN**

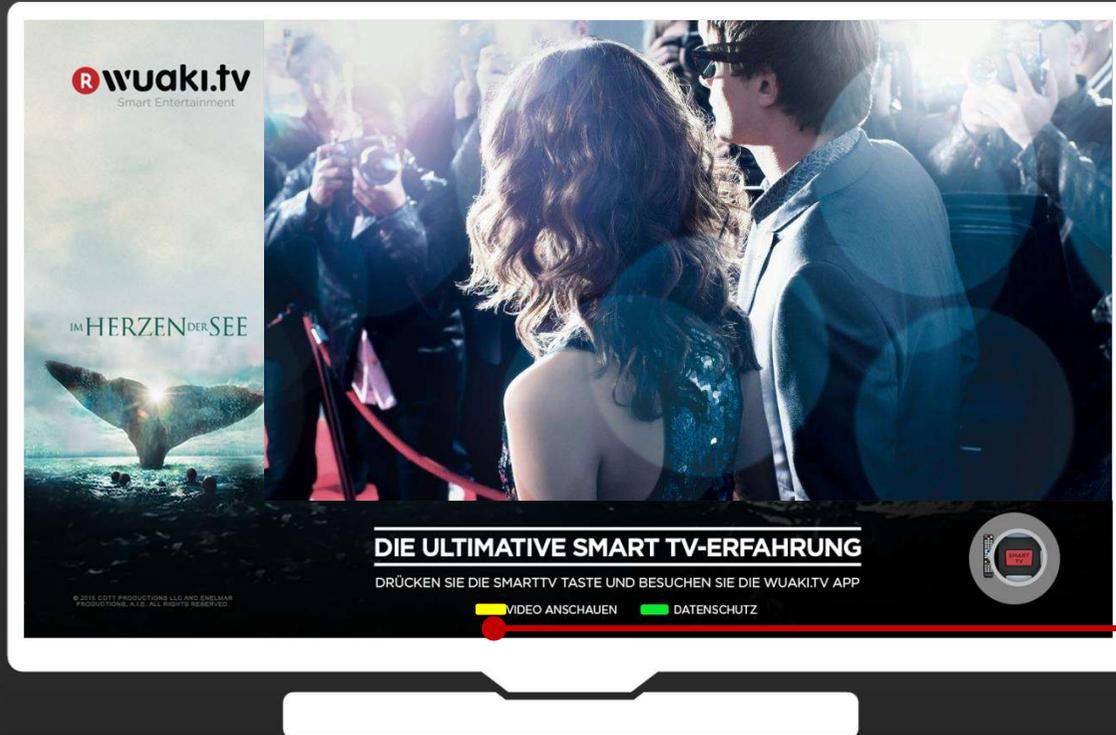
Guade Reise!

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

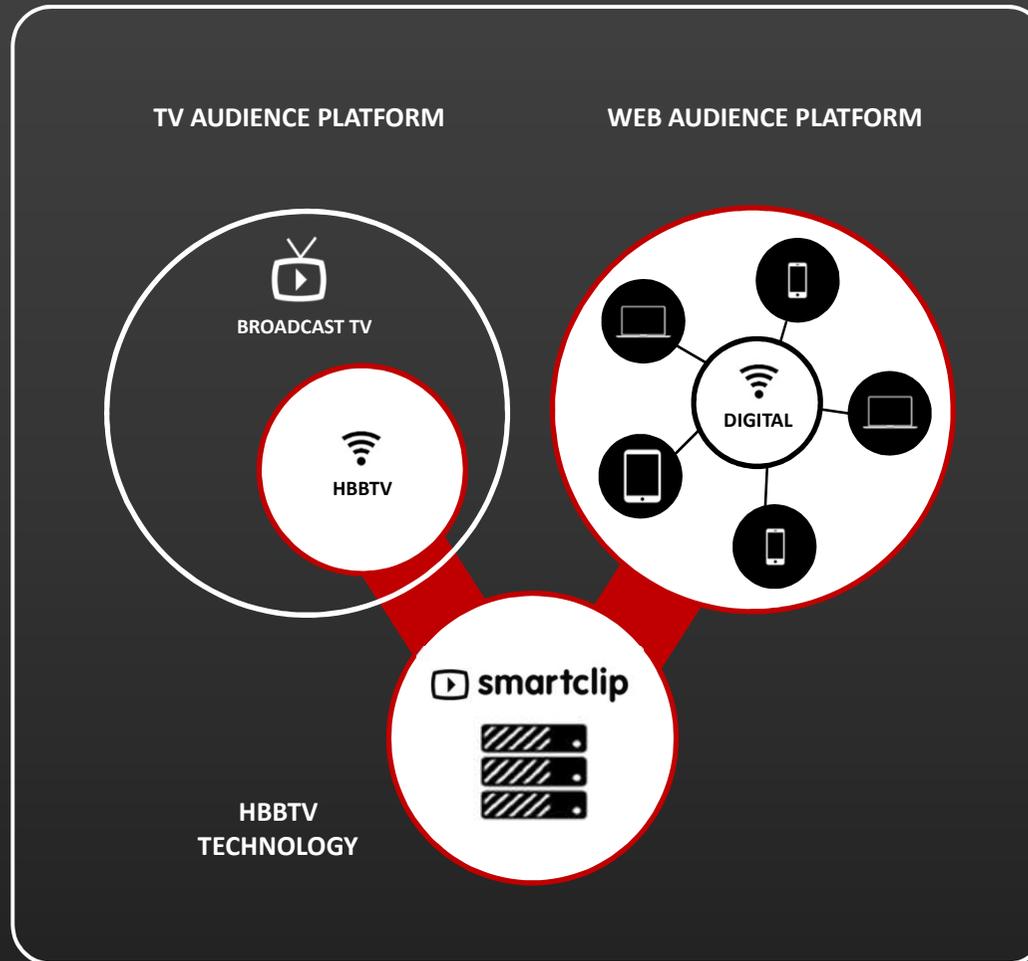


# ADDRESSABLE TV SOLUTIONS

**DATA CROSSDEVICE  
DESKTOP/SMARTPHONE/TABLET  
INCREMENTAL REACH**

# CROSSDEVICE UNIQUE SOLUTION

ATRESMEDIA   
**22%**  
HBBTV HOUSEHOLDS  
4.1 MM OPT IN



 smartclip

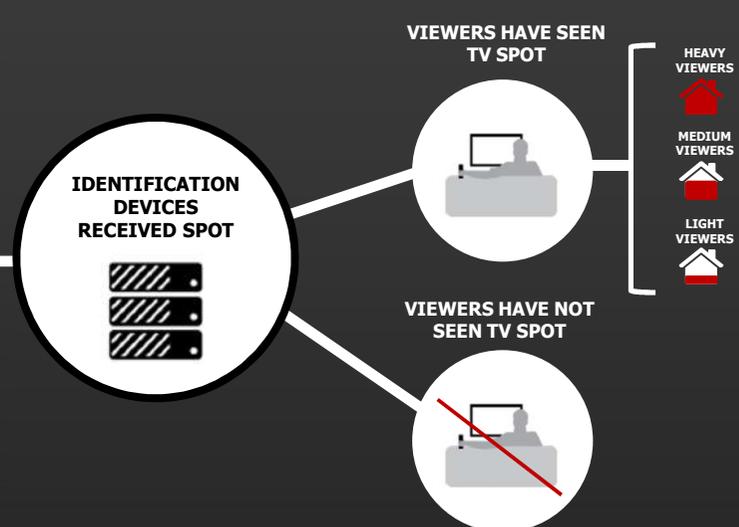
**93%**  
POTENTIAL REACH  
31.7 MM USERS

# CROSSDEVICE PROCESS

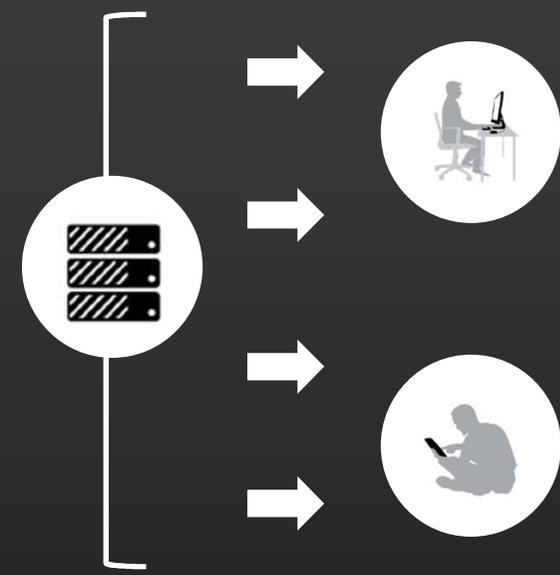
SPOT  
LINEAR TV



HBBTV  
TV CONNECTED

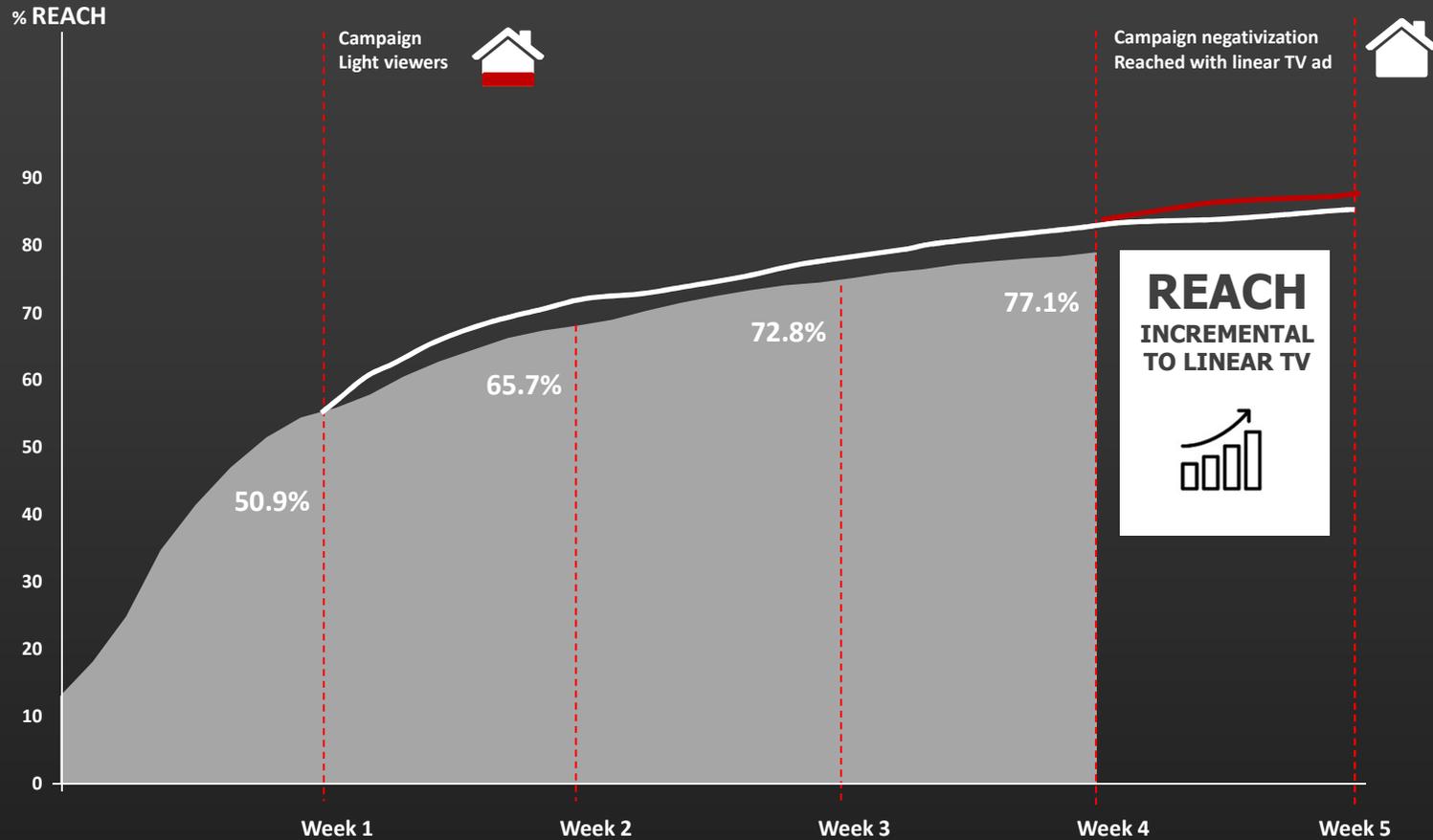


ENHANCED  
TARGETING VALUES  
TO DIGITAL DEVICES

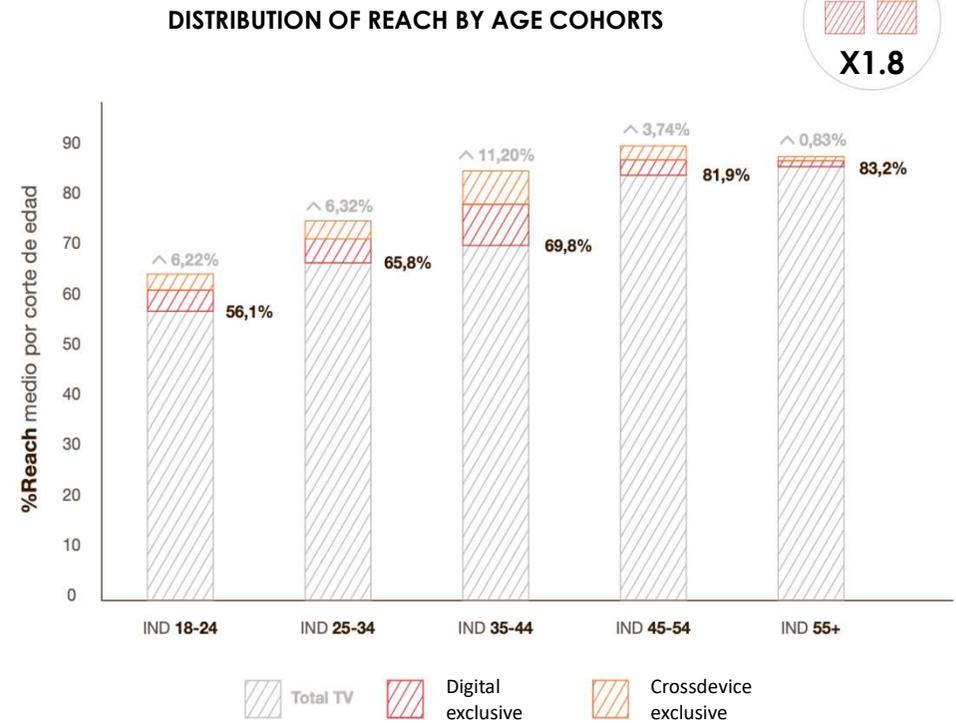
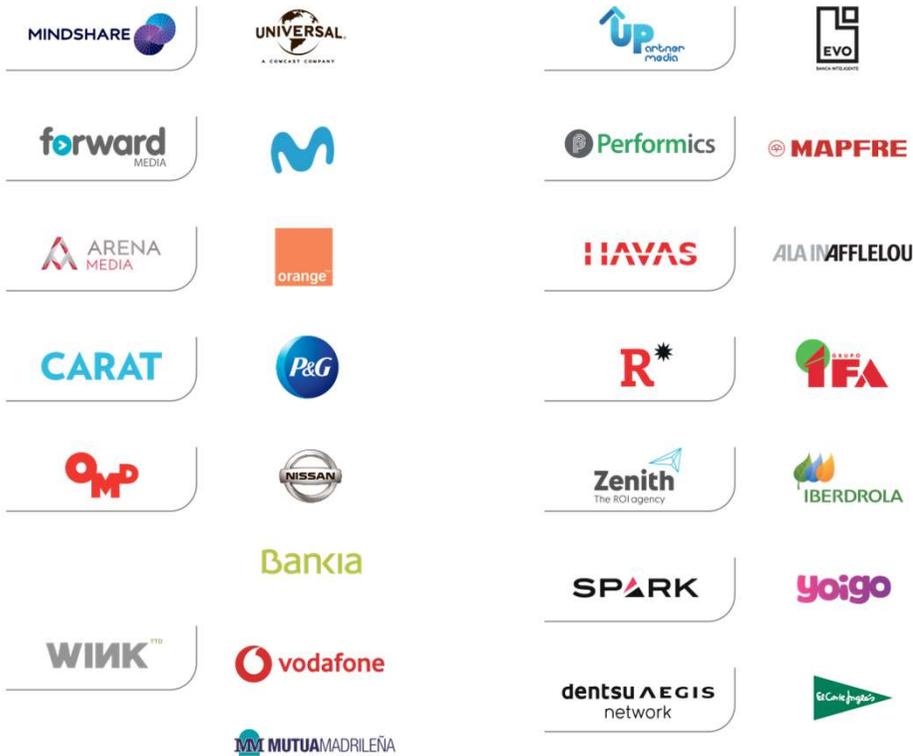


# EXAMPLE OF INCREMENTAL REACH TO LINEAR TELEVISION

CONSTRUCTION OF THE REACH CURVE OF A LINEAR TV CAMPAIGN



# PRE-LAUNCH BENCHMARK CROSSDEVICE ADVERTISING



# ADDRESSABLE TV SOLUTIONS

## TECHNOLOGY DEVELOPMENTS:

- MEASUREMENT TOOL | VAR
- DATA CROSSDEVICE DMP
- OWN DSP

# TOOL FOR REACH EXTENSION MEASUREMENT

**Simulaciones del proyecto TEST COCA-COLA**

herman.gonzalez

Pre-campaña

Busca tu proyecto

Nuevo proyecto

Todos mis proyectos

Exportar a XLS

Datos ofrecidos por AMC KANTAR COMSCORE

**CONDICIONES INICIALES**

GRPs: 300

Online

DESGLOSE DE TARGET

**TARGET HOMBRES 18-24**

GRPs	IMPRESIONES (OOO)	COBERTURA	OTS	COBERTURA EXCLUSIVA
TV ONLINE TOTAL	TV ONLINE TOTAL	TV ONLINE TOTAL	TV ONLINE TOTAL	TV ONLINE TOTAL
5034 4E4 5448	5034 4E4 5448	5034 4E4 5448	5034 4E4 5448	5034 4E4 5448

**TARGET MUJERES 18-24**

GRPs	IMPRESIONES (OOO)	COBERTURA	OTS	COBERTURA EXCLUSIVA
TV ONLINE TOTAL	TV ONLINE TOTAL	TV ONLINE TOTAL	TV ONLINE TOTAL	TV ONLINE TOTAL
5034 4E4 5448	5034 4E4 5448	5034 4E4 5448	5034 4E4 5448	5034 4E4 5448

**TOTAL CAMPAÑA**

TARGET BASE	TV	ONLINE	MULTIMEDIA	TOTAL	TARGET CORE
GRPs	250	133.5		133.5	
IMP (OOO)	92664	50000		50000	
% COBERTURA	70.4	28		28	
OTS	3.6	4.8		4.8	
% COB EXCLUSIVA	52	9.6		25.4	

GRÁFICAS SEMANA 22 de 2019

COBERTURA TOTAL 90%

ONLINE 30%

COBERTURA OTS

GRÁFICAS TOTAL CAMPAÑA

Exportar a XLS

Datos ofrecidos por AMC KANTAR COMSCORE

**VAR VIDEO ADVERTISING REACH**

ATRESMEDIA smartclip

**Pre-campaña**

Realiza simulaciones para las planificaciones de tu campaña.

CONTINUAR

**Post-campaña**

Analiza los resultados que has obtenido con tus campañas.

CONTINUAR



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.



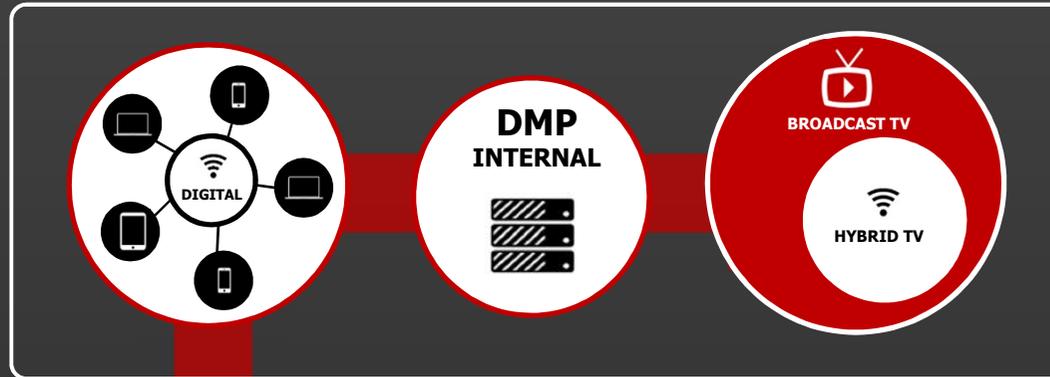
Study on the consumption of media in Spain.



Data collection and campaign effectiveness measurement.

# TECHNOLOGY DEVELOPMENTS

**CURRENT PHASE**



**PHASE 2**



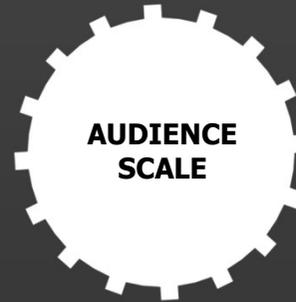
**PHASE 3**



# SMARTCLIP READY FOR THE FUTURE

## MOST RELEVANT CROSS DEVICE DIGITAL ADVERTISING DISTRIBUTION PLATFORM

**Drives Audience, Distribution and  
Monetization at Scale**



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



- Global infrastructure
- Unified Reporting & Analytics
- Ad Targeting and optimization
- Data Management Platform



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



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

# THANKS!



THE UNIQUE CROSSDEVICE ADVERTISING PLATFORM