

TELEVISION IN THE NEW EU-MEMBERS

RAPIDLY MOVING TV MARKETS

On May 1<sup>st</sup> 2004, ten new members joined the European Union. 8 of them were part of the former Eastern block.

The Central European Tv markets have changed dramatically after the fall of the Wall and the airwave liberalisation that followed. In less than a decade these TV markets have matured considerably offering now the same kind of programming and advertising opportunities than in the Western part of the continent.

We will focus this edition on three of the most buoyant TV markets of this region: Poland, Hungary and Slovenia.

Home Equipment rate (% of TVHH)

|                | WESTERN EU | POLAND | HUNGARY | SLOVENIA |
|----------------|------------|--------|---------|----------|
| COLOUR TV      | 98%        | 98%    | 95%     | 96%      |
| MULTISET       | 54%        | 31%    | 32%     | 22%      |
| VCR            | 74%        | 51%    | 49%     | 37%      |
| CAB SAT HOMES  | 52%        | 58%    | 63%     | 56%      |
| TELETEXT       | 70%        | 70%    | 47%     | 65%      |
| PC (Home)      | 48%        | 20%    | 28%     | 25%      |
| MOBILE (% pop) | 67%        | 38%    | 70%     | 55%      |

Source: IP Television International Key Facts 2003

If the equipment rate remains below the average of Western Europe's, these countries are catching up rapidly. Multichannel homes are a reality in Central Europe. The 3 surveyed countries have a higher cable and satellite home penetrations than the western average.

A complete TV offer

Private commercial stations appeared in the 90s. They are now offering an alternative to national public channels born in the late 60's.

Every country has now a dual public-private system on the West-European model. Private TV stations are increasingly targeted with constant new station launches. Pay tv offer has also entered the market, quite modestly so far. Digital TV is a reality in Poland with two competing platforms attracting significant number of subscribers. Elsewhere in Central Europe the digital age has yet to come.

Programming: western-style TV

Alongside international hit drama series like ER or 24, the largest TV stations in the regions also adapt international formats. Local version of the Bar and Pop Idols in Poland attracted huge followings for Polsat, while "Legyen on is milliomos?" (Who wants...) on RTL Klub in Hungary scored an amazing 68% market share on Adults 18-49 in 2003. "Najsibkejsi clen » (the weakest link) is successfully aired on SLO1 in Slovenia.



Pop idol, Polsat



Pensjonat, the Rose Inn, drama Polsat

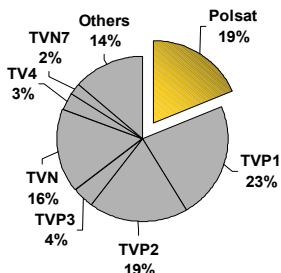


Monika, talk / RTL Klub

With the growth of advertising revenues the TV stations have also increased their commitment towards locally produced entertainment and fiction with huge rewards in term of audience. "Baratok Közt", a daily Hungarian soap is Hungary's #1 drama since 1998, with shares up to 60% against adults 18-49. "Pensjonat, the Rose Inn", relating the adventures of 3 women in a small hotel, is a big success on Polsat since January with up to 36% share on women 16-49. For more information on these countries, do not hesitate to contact us.

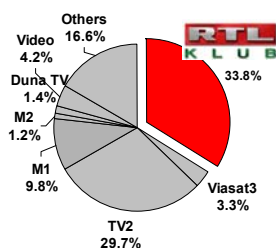
AUDIENCE SHARES (%) – Q1.2004

POLAND



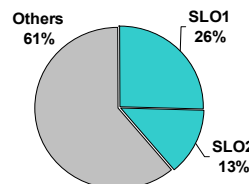
Source:AGB Polska, Adults 16-49, All day, Jan-March 2004

HUNGARY



Source:AGB Hungary, Adults 18-49, All day, Jan-April 2004

SLOVENIA



Source:Media Services AGB, 4+, All day, Jan-March 2004

TV PORTFOLIO

AUSTRIA

RTL, Super RTL, RTLII, VOX

BELGIUM

RTL-TVI, Club RTL, Plug TV, VTM,

Kanaal2,

JIM TV

GERMANY

RTL, RTLII, Super RTL, VOX, n-tv,

RTL Shop

HUNGARY

RTL Klub

LUXEMBOURG

RTL Tele Letzebuerg

THE NETHERLANDS

RTL4, RTL5, RTL Z,

Yorin

POLAND

Polsat

SLOVENIA

SLO1, SLO2

SPAIN

Antena3

SWITZERLAND

RTL, RTLII, VOX,

Super RTL

RADIO PORTFOLIO

BELGIUM

BEL RTL, Fun Radio,

Radio Contact,

Contact2, Nostalgie,

BFM, TOP Radio

FRANCE

RTL, Fun Radio,

RTL2, Sud + Wit FM,

MFM

LUXEMBOURG

RTL Letzebuerg,

Eldorado

THE NETHERLANDS

Yorin FM, RTL FM

## GERMANY: NEW PROGRAMMES IN SPRINGTIME

The launch of new programmes is no more limited to the September period. German tv stations constantly introduce new formats. Here a round-up by station of the spring launched programmes that had an impact on audience.

### REALITY TV PROGRAMMES



RTL, Tue.20.15



RTLII, Daily 19:00,  
Mon. 20.15

German adaptation of challenge-driven "Fear Factor" launched end of April. The show is broadcast on Thursday at 21:15. Fear Factor averaged around 17-18% audience share against male 14-49 for its 4 first weeks on air.

The Fifth season of a renewed **Big Brother** launched on RTL II on March 2<sup>nd</sup>. The new season is successful with good & stable rating in access and prime time against young adults targets. For instance the average audience share of the daily program and the weekly prime time is around 18%-19% against young adults 14-29.

### "HYBRID" CRIME DOCU



Einsatz für Ellrich,  
RTL Mon.-Fri. 17:00

A new genre of daytime crime docu « Einsatz für Ellrich » (a case for inspector Ellrich) launched on April 19<sup>th</sup> on RTL.

In this hybrid genre a real police team investigates on fictive criminal cases in the Cologne area.

## TELEVISION IN SPAIN

Spanish broadcaster Antena 3 increased its market share up to 20 percent in the first five months of 2004, up 0.7 percentage point on the year, making it the fastest growing television station in Spain in 2004.

New formats are the main contributors to the channel growth. Antena 3 taps on the Spanish audience's growing appetite for local made series.

### ENDURING SUCCESS FOR DOCU SOAPS

Primetime docu soaps offered by VOX and RTL II are highly successful in German market with new seasons on air. Property home makeover series and family-oriented series are especially popular.



New season on RTLII



Frauentausch (exchanging mothers) RTLII, Thu..20:15



New season on VOX



Property docusoap  
VOX, Tue.20:15

### NEW US CULT SERIES

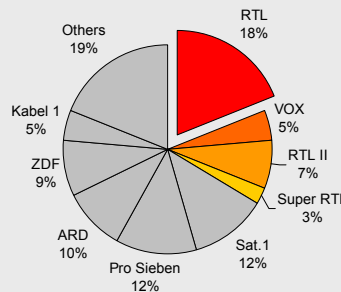


MONK arrives on RTL in June! Monk is an obsessive and compulsive detective who is afraid of virtually everything (germs, height, crowds, milk...). MONK is the illegitimate son of Columbo and Ally McBeal!

« Six Feet Under », the black humour US series around the death business launched on May 11<sup>th</sup> on Vox on Tuesday night time slot. For the Fisher family, the world outside of their family-owned funeral home continues to be at least as challenging as--and far less predictable than-- the one inside.

## GERMANY

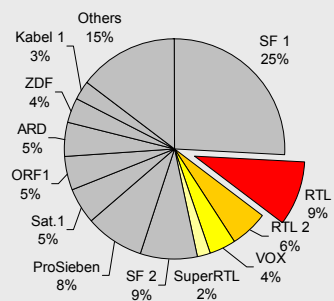
Audience Share/ Ad.14-49/  
17:00 – 23:00



Source:Source:AGF/GfK Fernsehforschung  
, Monday-sunday, Jan. Mar. 04

## GERMAN SWITZERLAND

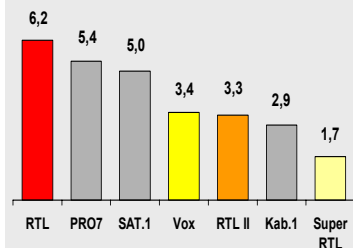
Audience Share/ Ad.15-49/  
1800 – 23:00



Source : Publica Data AG - Telecontrol  
/ IPM / Mon-Sun

## AUSTRIA

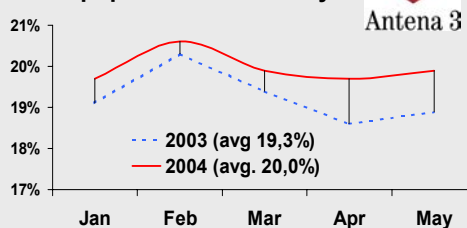
Audience Share – private TV  
All Adults 12+ / Prime



Source: TELETTEST, F-G, pc#tv, IPA-plus (Austria)  
20:15 – 23:15/ Mon-su

## Audience share %

Total population 3+ / all day



Source:TNS – Peninsula y Baleares

## NEW ADVERTISING FORMATS

## RADIO

### Split-Screen spots now available in the Netherlands !

Split screen is the simultaneous transmission of editorial material and commercial information in the same screen by separating it in 2 or more parts. Advertising could account to up to 75% of the screen, the rest being devoted to editorial information (coming next programme information, end of programmes credits, weather forecast, ...).

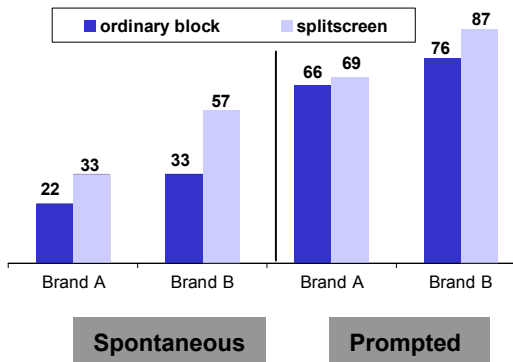
Split screen spots are broadcast outside the advertising blocks and benefit thus of a perfect transition with the programme.

The first advertiser to use it was Opel to launch the new Astra car with a split screen spot just after the evening news.

German research surveys have proven effectiveness of split screen advertising. Not only are split screen spots particularly well accepted by viewers but split screen campaigns also enjoy higher advertising recall than classical spot campaigns.

### Advertising recall / Split screen vs classical spot

Gute Zeiten Schlechte Zeiten case

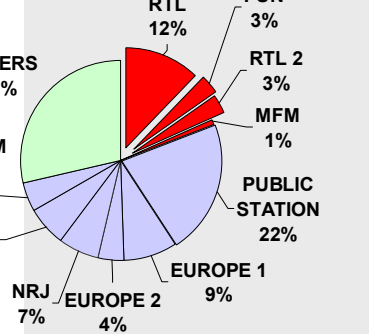


Source: Adults 14-49, watching Gute Zeiten Schlechte Zeiten at least sometimes. Studiotest on credits split-screen, May 2001

To know more about split screen advertising please contact your IP NETWORK office.

## FRANCE

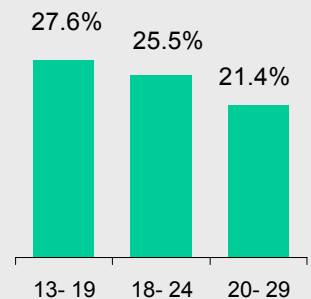
### Audience Share / all adults



Source: Mediametrie 75 000+, Adults 15+, All day, Jan-March 2004

## THE NETHERLANDS

### Yorin FM- Weekly Reach by age groups

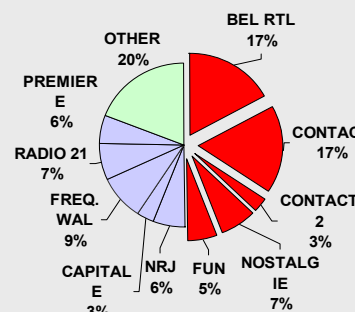


Source: Intomar; Feb-March 2004

## SOUTH BELGIUM

### Radio Audience Share

#### Adults 12-54



Source: CIM Wave 4, Adults 12-54, All day, October-December 2004

## SPONSORSHIP RULES IN THE NETHERLANDS

As of June 1st 2004 onwards RTL 4 and RTL 5 offer new opportunities to advertisers interested in sponsorship advertising.

RTL 4 and RTL 5 which are broadcasting under a Luxemburg's license to the Netherlands have now decided to follow the Luxemburg's legislation concerning billboard sponsorship.

This means much more flexibility for advertisers. You may now mention / show not only the name and logo of your brand but also the product or the service in 5 sec. billboards before and after programmes.



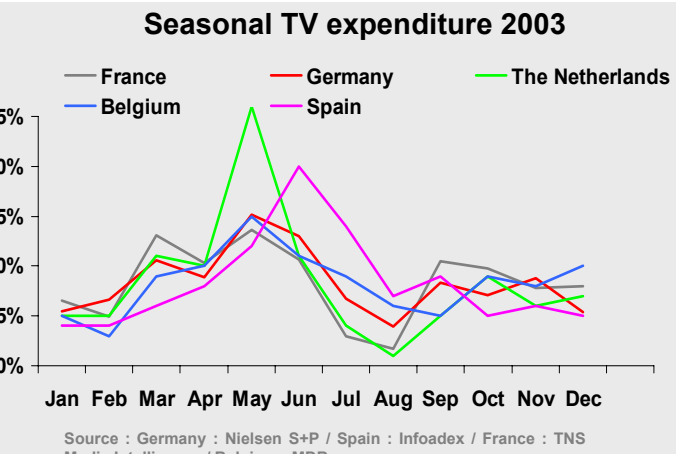
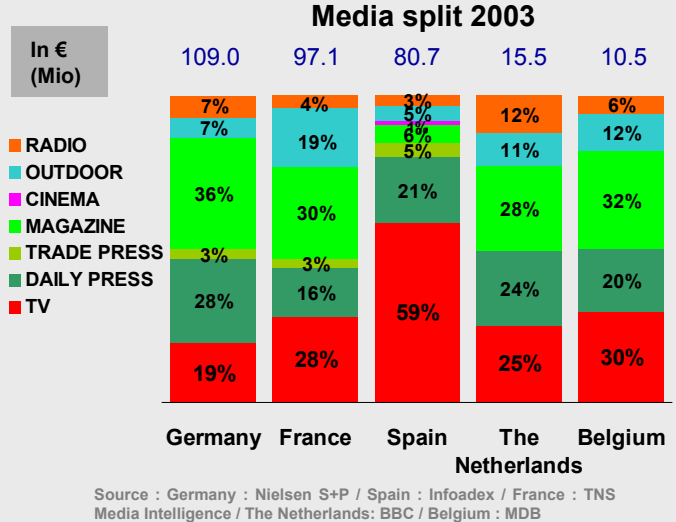
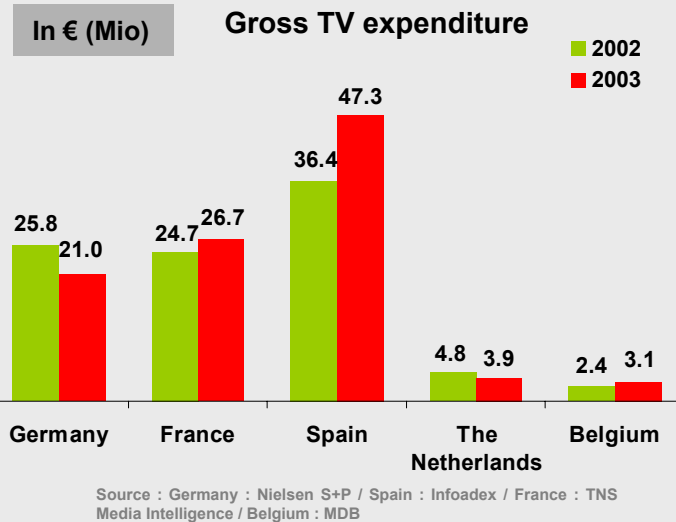
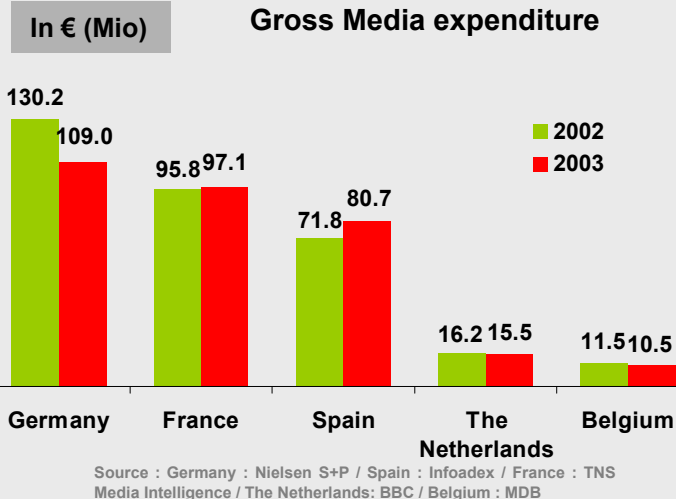
You may mention a general in use pay-off and show the URL of your general website. You can use music or characters from the commercial spot.

With these new rules billboard sponsorship on RTL 4 and RTL 5 can perfectly be integrated with a normal spot campaigns. Sponsorship campaigns can be more creative and effective on RTL channels.

**DATA SHEET: TOURISM BOARDS SURVEY**

International tourism in 2003, went through a considerably difficult year given the conflict in Iraq, SARS and a persistently weak economy.

Nevertheless advertising investments of Tourism Boards only decreased by 4% in the 5 surveyed countries. This decrease can largely be explained by the English Tourism Board squeezing its advertising investments all over Europe.



Through the vast marketing resources of our media, we are able to tap into a wealth of information to create an **exclusive choice of international surveys that suit advertisers & advertising agency requirements**.

Don't hesitate to contact your local IP NETWORK office to get a list of available presentations !