

Bankhaus Lampe

Switzerland 24-25th April 2018



ENTERTAIN. INFORM. ENGAGE.

Agenda



**Full-year
2017 highlights**



**Business
update**



**Outlook
2018**

Highlights

Another set of record results

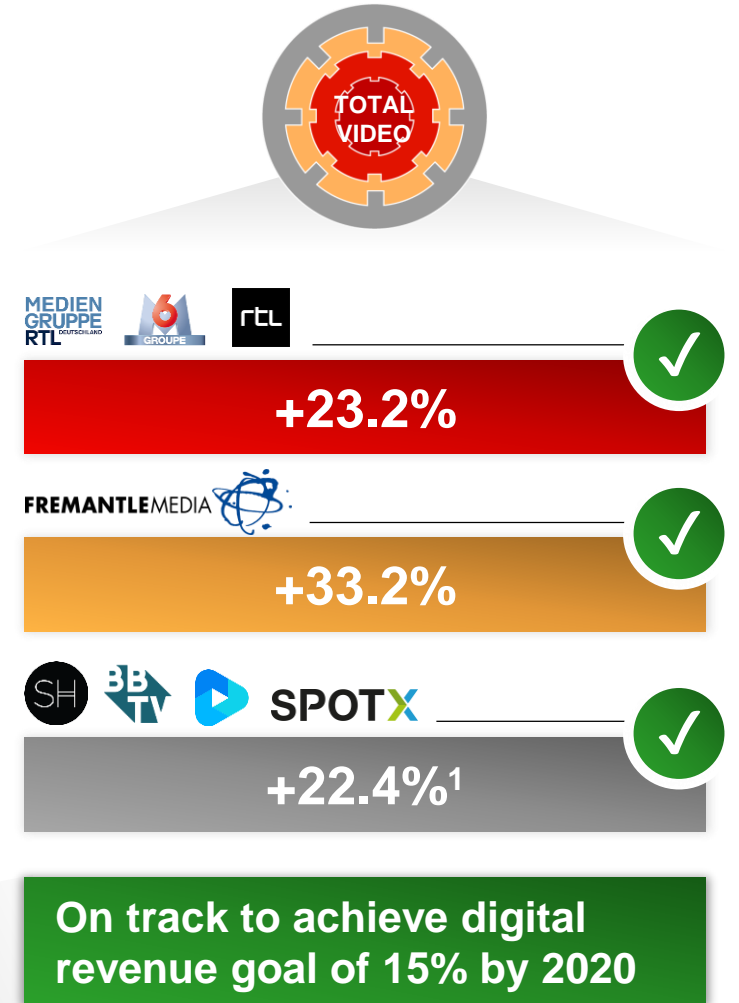
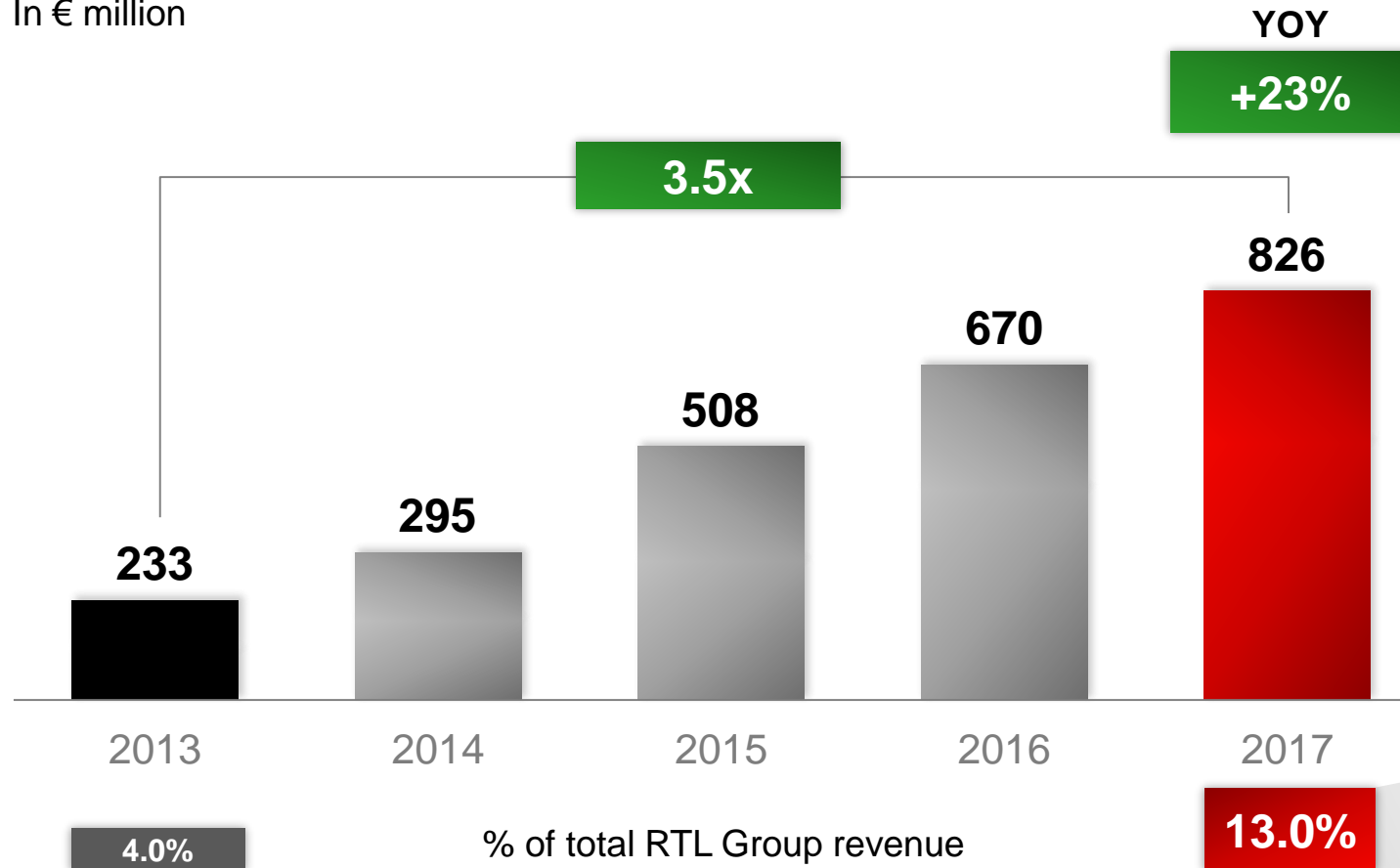


Notes: Revenue and EBITDA percentages refer to year-on-year growth on 2016. 1. Yield is based on average 2017 share price and including €1.00 interim dividend paid in September 2017.

Highlights

Digital: dynamic growth

DIGITAL REVENUE
In € million



Source: Internal figures.

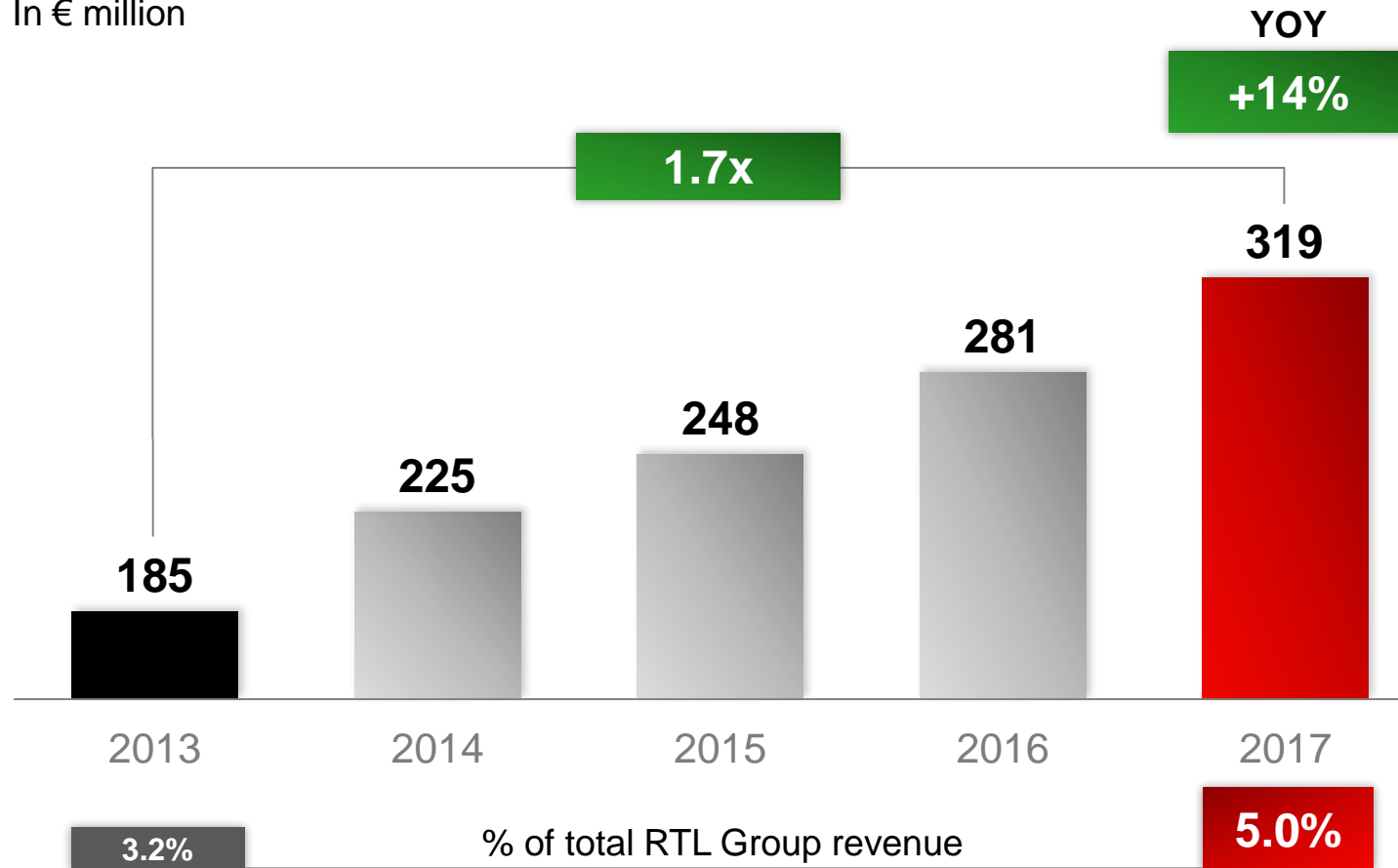
1. Divimove: revenue included in 2017, not 2016.

Highlights

Platform: growing and highly profitable revenue stream

PLATFORM REVENUE¹

In € million



HD channels



Thematic channels



New deals signed in 2017 & 2018



Further growth secured

1. Platform revenue defined as revenue generated across all pay platforms (cable, satellite, IPTV) including subscription and re-transmission fees.

Highlights

Attractive dividend yield

In € million	Full-year to December 2017
Profit for the year attributable to RTL Group shareholders	739
<i>Adjustments for:</i>	
Capital Gain	(62)
Re-measurement	(14)
Restructuring	16
Adjusted net result	679
Ordinary dividend, in € per share	3.00
Ordinary dividend, absolute amount ¹	461
Dividend payout, in %²	68%

Dividend
yield of
5.9%³

1. Based on total share capital less treasury shares held by the Group and liquidity programme.

2. Ordinary dividend, absolute amount / adjusted net result.

3. Including €1.00 interim dividend and based on average share price in 2017 (€68.25).

Agenda



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Outlook
2018



#1 TV FAMILY

**MEDIEN
GRUPPE
RTL**
DEUTSCHLAND

IN GERMANY

RTL
GROUP

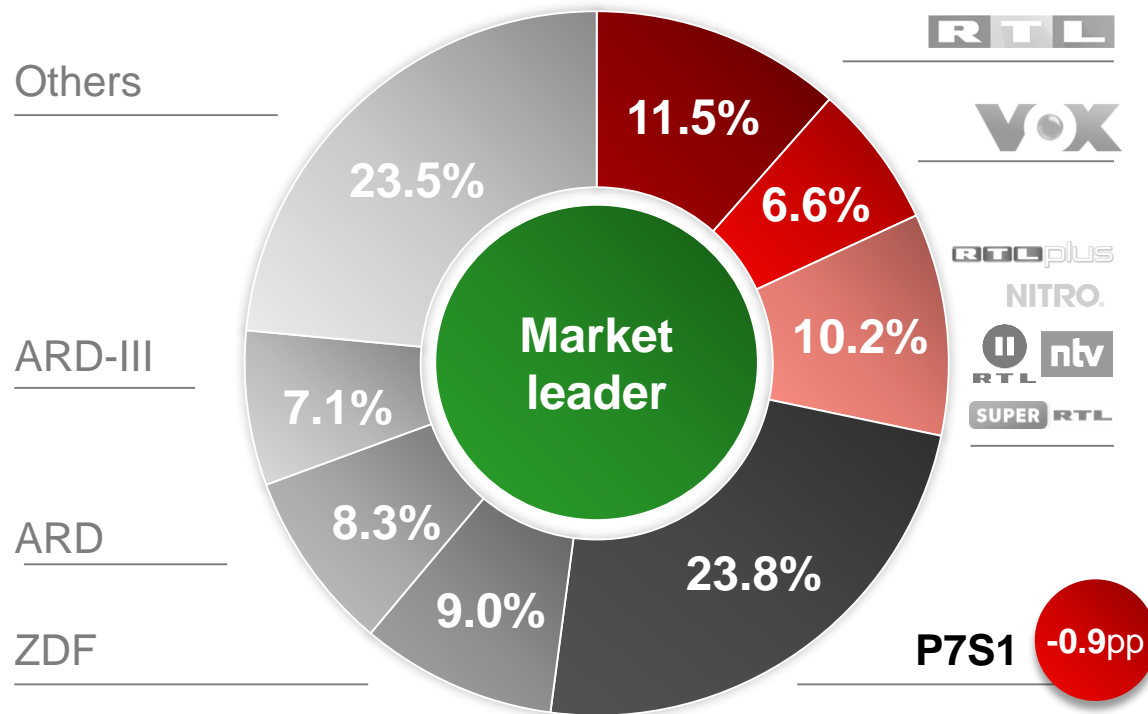
Mediengruppe RTL Deutschland

Lead over P7S1 further increased

FAMILY OF CHANNELS

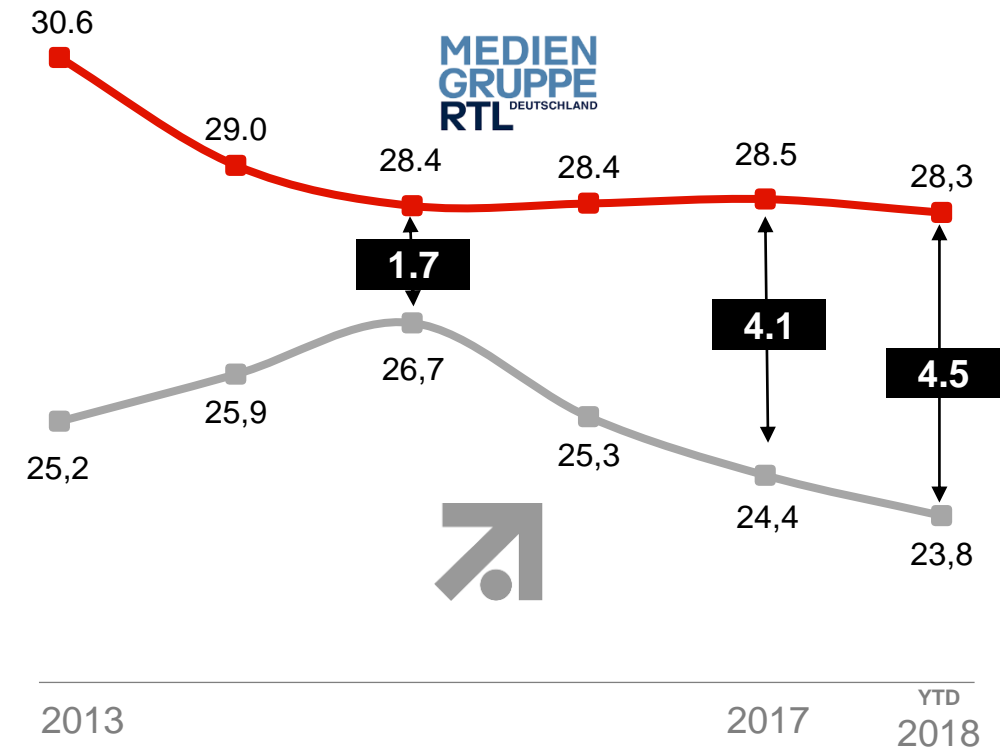
14 to 59, Q1 2018

MG RTL 28.3%



LONG-TERM DEVELOPMENT

All day, adults 14-59 years in %



Source: AGF in cooperation with GfK, differences may be due to rounding.
Notes: Audience shares only refer to the free to air channels of the respective broadcasters.

Mediengruppe RTL Deutschland

Local content creates strong unique selling point...

Local hits catalogue more valuable than ever...

...especially for building non-linear offers

RTL	 19 th season	 14 th season	 26 th season	 10 th season	 8 th season
	 11 th season	 13 th season	 23 rd season	 11 th season	 2 nd season
VOX	 4 th season	 4 th season	 3 rd season	 6 th season	 11 th season
	RTL II	ntv	SUPER RTL	NITRO.	RTLplus



- TV NOW**
 - ✓ Online-first content
 - ✓ Mainstream appeal

- NOWUS**
 - ✓ US drama OTT channel
 - ✓ Exclusively on TV NOWLaunching end of March

- vodafone** **free net** **GIGA TV**
 - ✓ Growing VOD distribution agreements

Mediengruppe RTL Deutschland

... resulting in audience leadership in nearly all day-parts

Difference between combined audience shares RTL & VOX vs. Pro7 & Sat.1 (14-59 in % points)

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Early morning 06.00-09.00			-2.5 (+0.1)			+3.6 (+5.7)	+9.7 (+9.5)
Late morning 09.00-13.00			+0.1 (+1.7)			-4.7 (-0.7)	+2.8 (+2.8)
Afternoon 13.00-17.00			+1.6 (+1.2)			-1.3 (-1.1)	+3.0 (+0.4)
Access PT 17.00-20.15			+4.4 (+3.1)			+6.6 (+3.5)	+4.5 (+4.0)
Primetime 1 20.15-21.15	-3.2 (-4.0)	+2.0 (+2.5)	+9.3 (+8.5)	+3.1 (-0.8)	+3.6 (+2.1)	+7.2 (+7.6)	+1.2 (-3.4)
Primetime 2 21.15-22.15	+1.3 (-0.3)	+1.7 (+3.1)	+8.7 (+8.2)	+1.1 (-1.8)	+3.1 (+3.8)	+7.8 (+8.9)	
Primetime 3 22.15-23.15	+1.9 (+4.5)	+7.6 (+8.1)	+7.9 (+10.1)	+2.4 (+1.4)	+4.8 (+10.2)	+10.4 (+13.8)	+2.1 (+4.8)
Late night 23.15-01.00			+5.4 (+6.8)			+12.3 (+10.0)	+0.7 (+3.9)

Source : AGF/GFK 1 Jan – 31 Mar 2018
Q1 2017 comparatives in brackets

■ Cum. % points ahead of Pro7 & Sat.1



#2 TV FAMILY



IN FRANCE



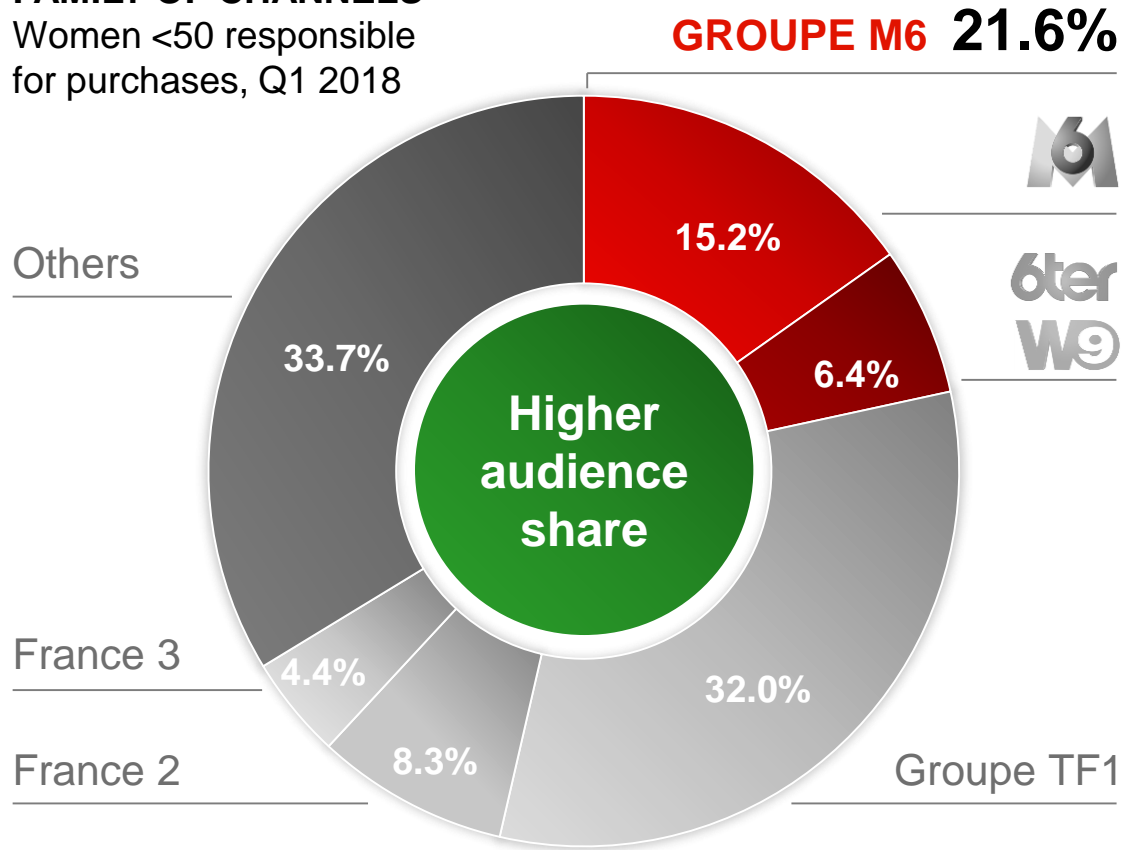
Groupe M6

French business outperformed net TV ad market

**Solid Q1 financial results:
+3.4% advertising revenue
EBITA impacted by one-off's**

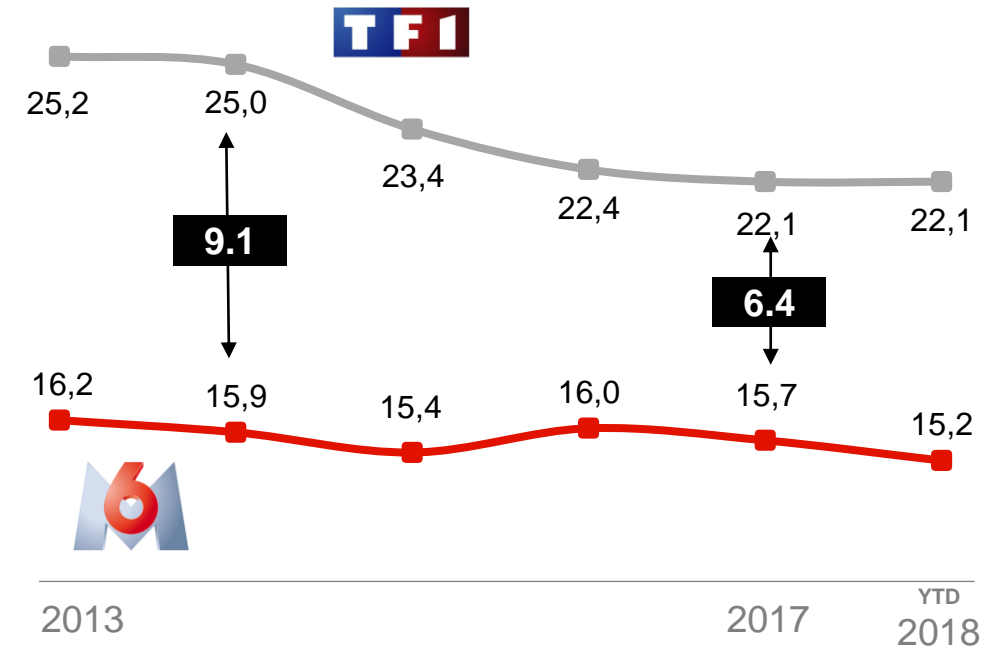
FAMILY OF CHANNELS

Women <50 responsible for purchases, Q1 2018



LONG-TERM DEVELOPMENT

Women <50 responsible for purchases in %



Source: Médiamétrie

Notes: Groupe M6: M6, W9 and 6ter; TF1 Group: TF1, TMC, NT1 and HD1; 1. Pro-forma including RTL Radio (France).



***MORE
CREATIVE***



FREMANTLEMEDIA

POWER

RTL
GROUP

FremantleMedia

Push into drama complements exceptional entertainment line-up

TOP ENTERTAINMENT SHOWS

✓

13th season



✓

15th season



✓

17th season



**American Idol is back –
on ABC 11th of March**

abc

✓

42nd season



✓

47th season



✓ Renewed

HIGH END DRAMA SERIES

**Charité: Most popular
German FTA drama launch**

ARD

✓ Avg. Audience 7.5m

✓

3rd season



✓

2nd+3rd season



✓

2nd season



✓

2nd season



✓

2nd season



NEW IN 2018

FOXTEL
CANAL+
BBC

Picnic at Hanging Rock

HBO
Rai Italia
CANAL+

My Brilliant Friend

NETFLIX

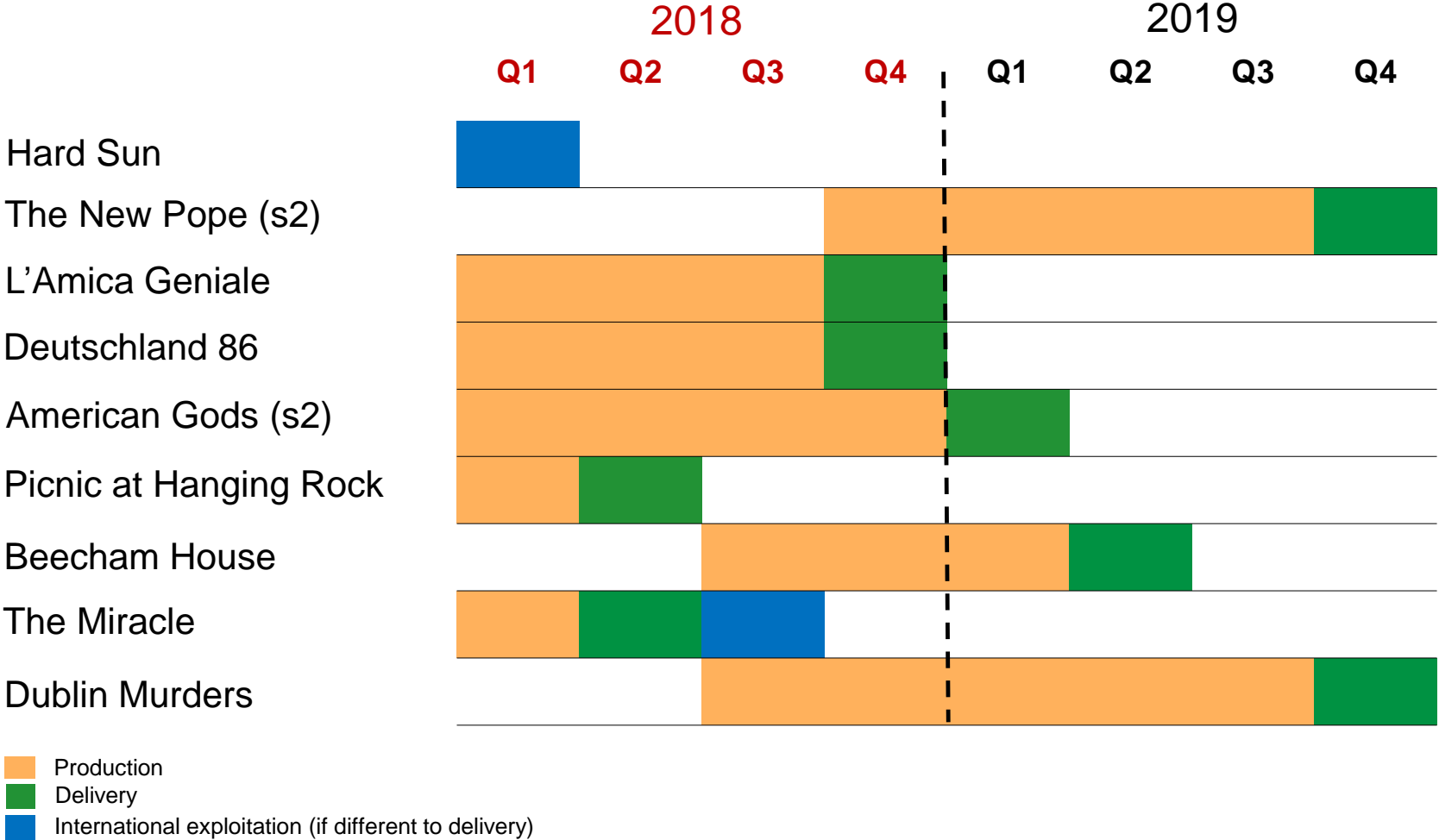
The Rain

BBC
hulu

Hard Sun

FremantleMedia








Expected timing on delivery of selection of drama shows





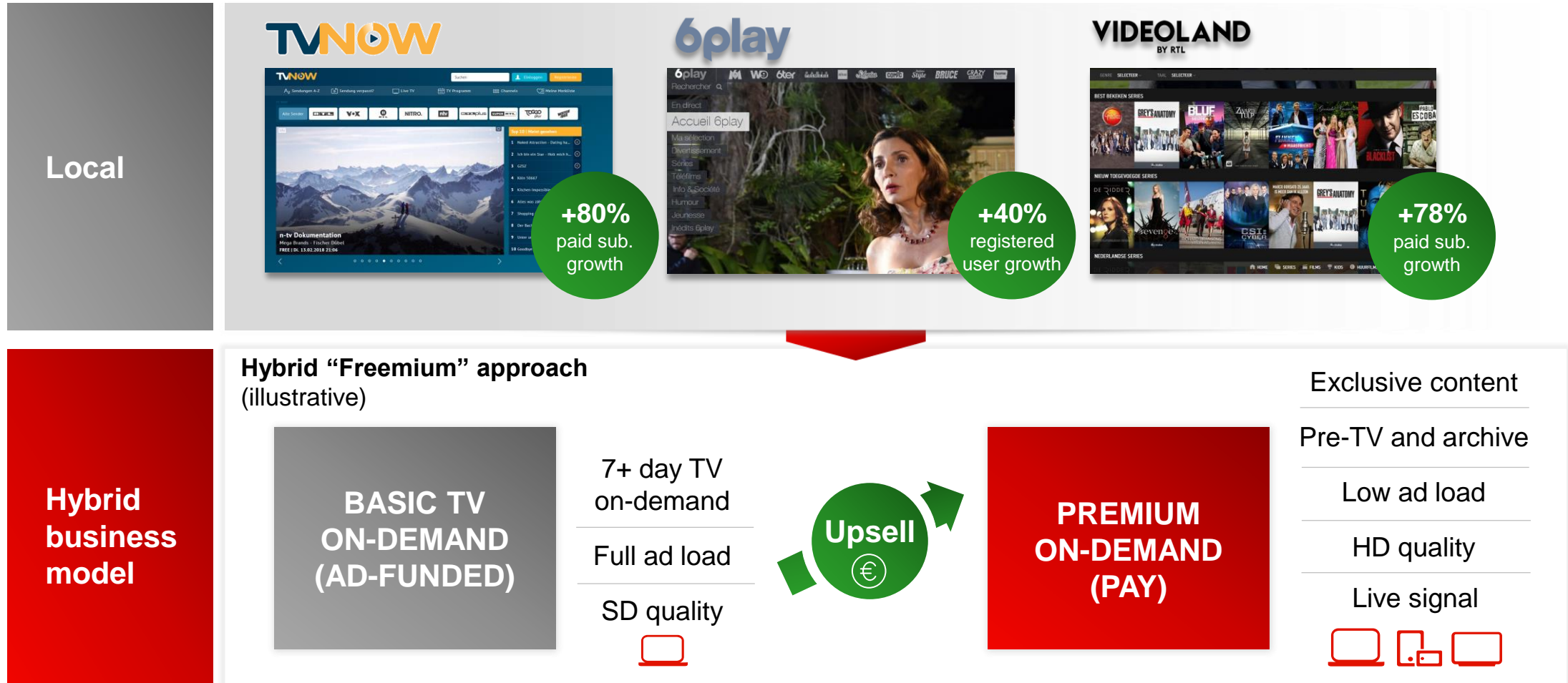
DIGITAL

POWERHOUSE

- SPOTX  smartclip
-  clypd
-  videoamp
-  3B TV
-  SH STYLEHAUL
-  DIVIMOVE
-  unitedscreens


Digital Video – Long-form

Enhancing our local TV on-demand offers...




Digital Video – Short-form


Our multi-platform networks: global #1 on YouTube




#1 in North America



#1 in Europe




#1 in Nordics




Unmatched global reach & consistent growth


#1 MPN globally



Europe's leading branded content network

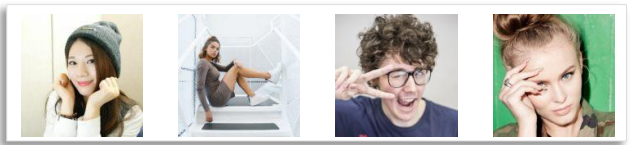
#1 MPN in EU
#1 MPN Event in EU – Videodays






Acquired unique direct sales team for branded content

#1 MPN in Nordics





Influencer marketing with data / retargeting expertise

#1 in fashion and beauty

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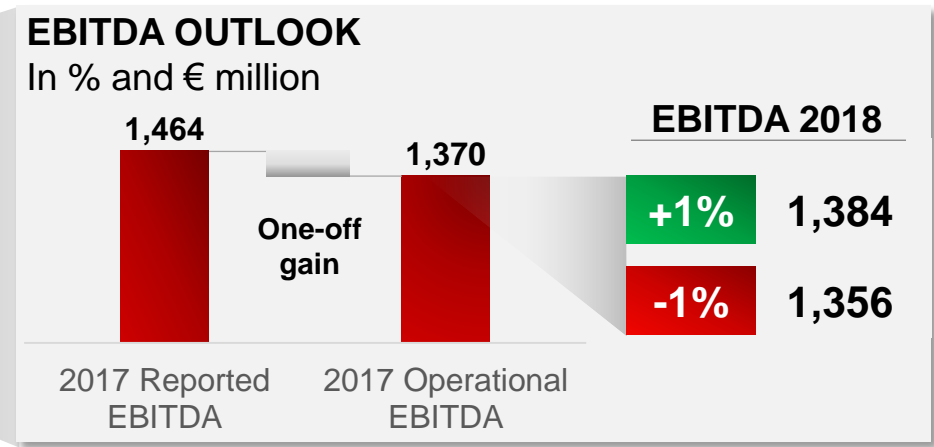
**Outlook
2018**

RTL Group Outlook for 2018

1 Revenue expected to grow moderately, predominantly driven by FremantleMedia and digital 



2 EBITDA expected to be broadly stable in 2018 on a normalised basis 



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