

Morgan Stanley



Barcelona, 17 November 2016

Agenda

1



**9 month
2016 highlights**

2



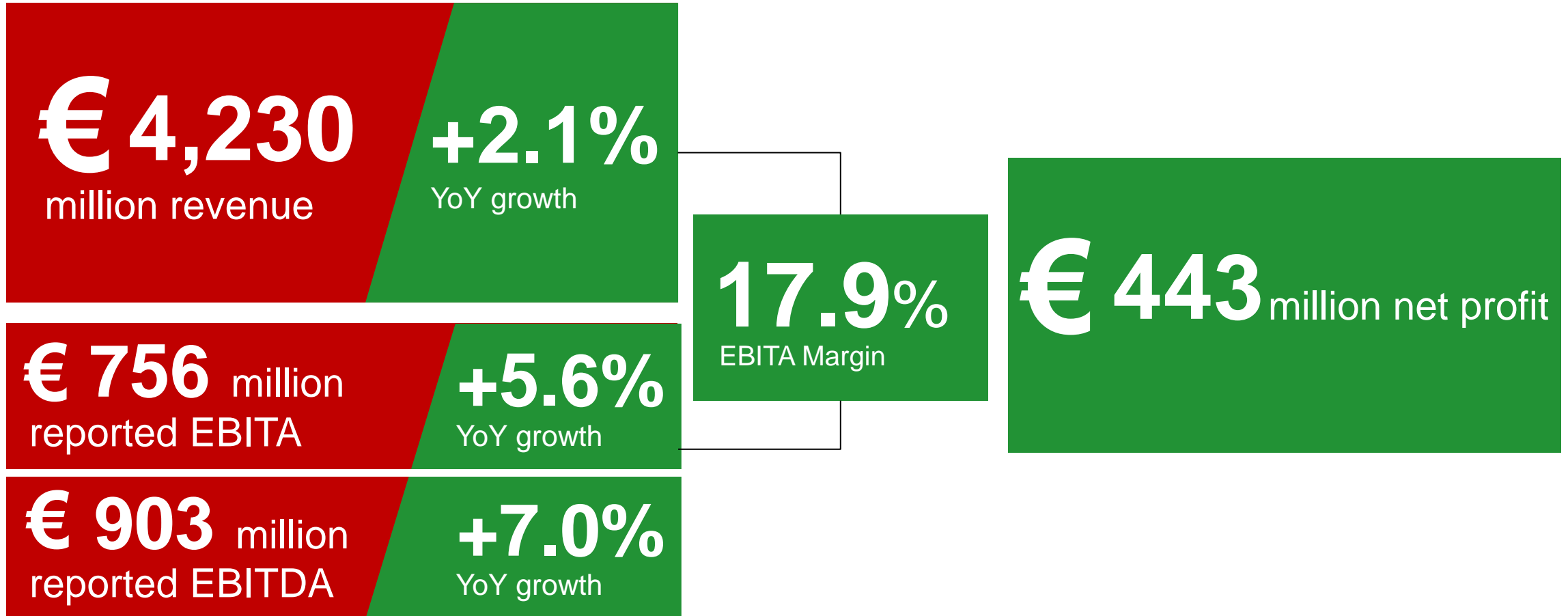
Business
segments

3



Outlook 2016

9 months 2016: Good financial performance continues



Agenda

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9 month
2016 highlights

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Business
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Outlook 2016

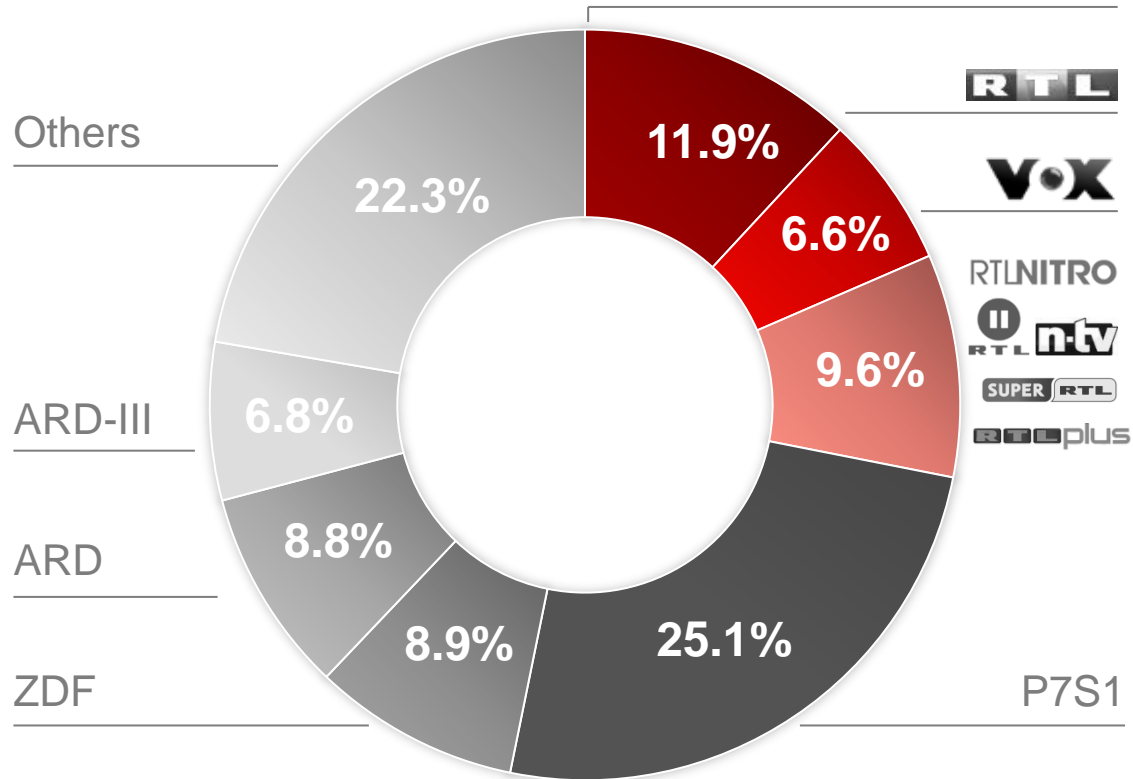
Mediengruppe RTL Deutschland

High audience shares and continued improvement in profitability

FAMILY OF CHANNELS

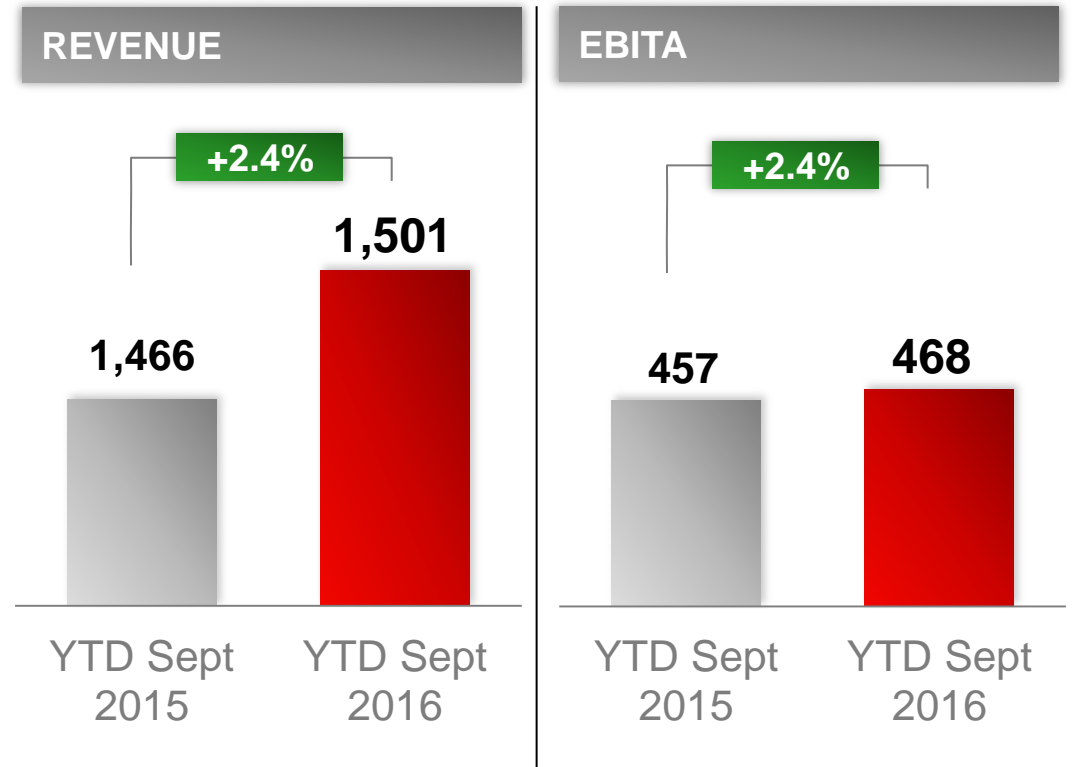
14 – 59, YTD Sept 2016

MG RTL 28.1%



KEY FINANCIALS

In € million

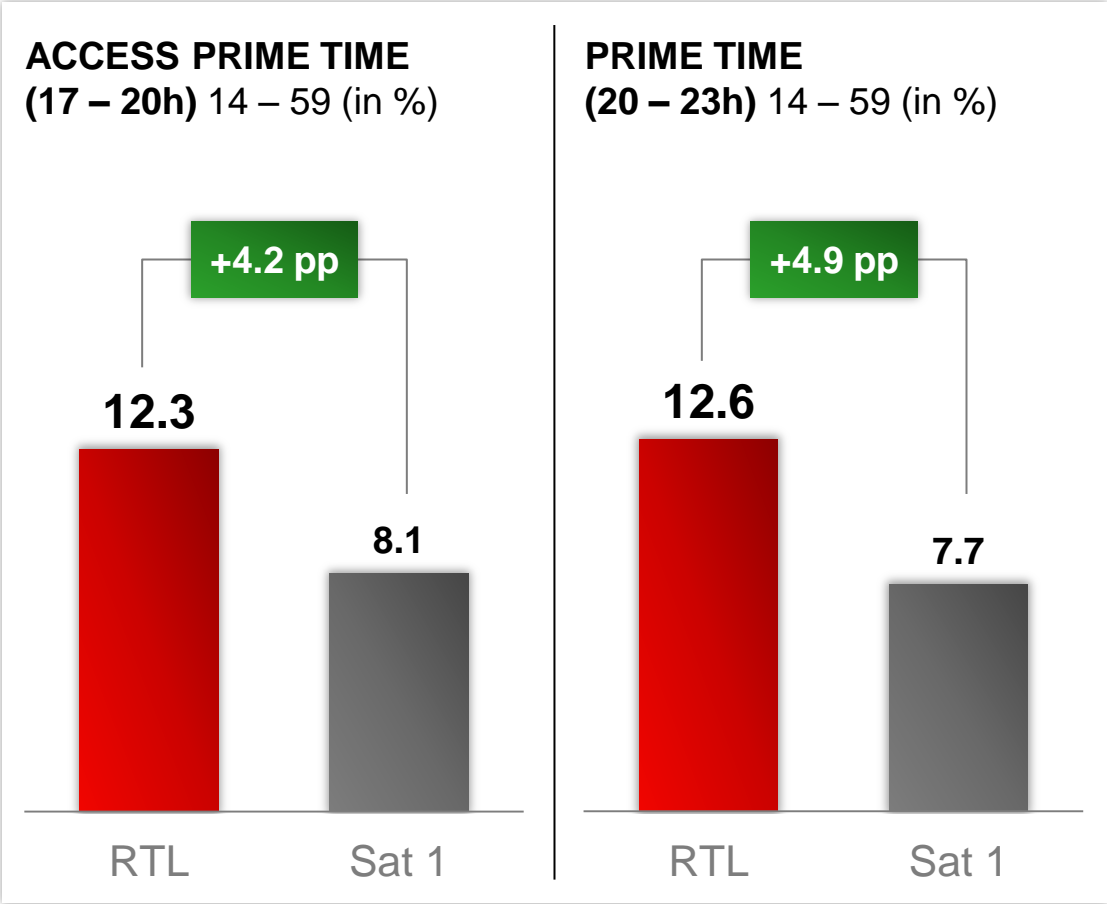
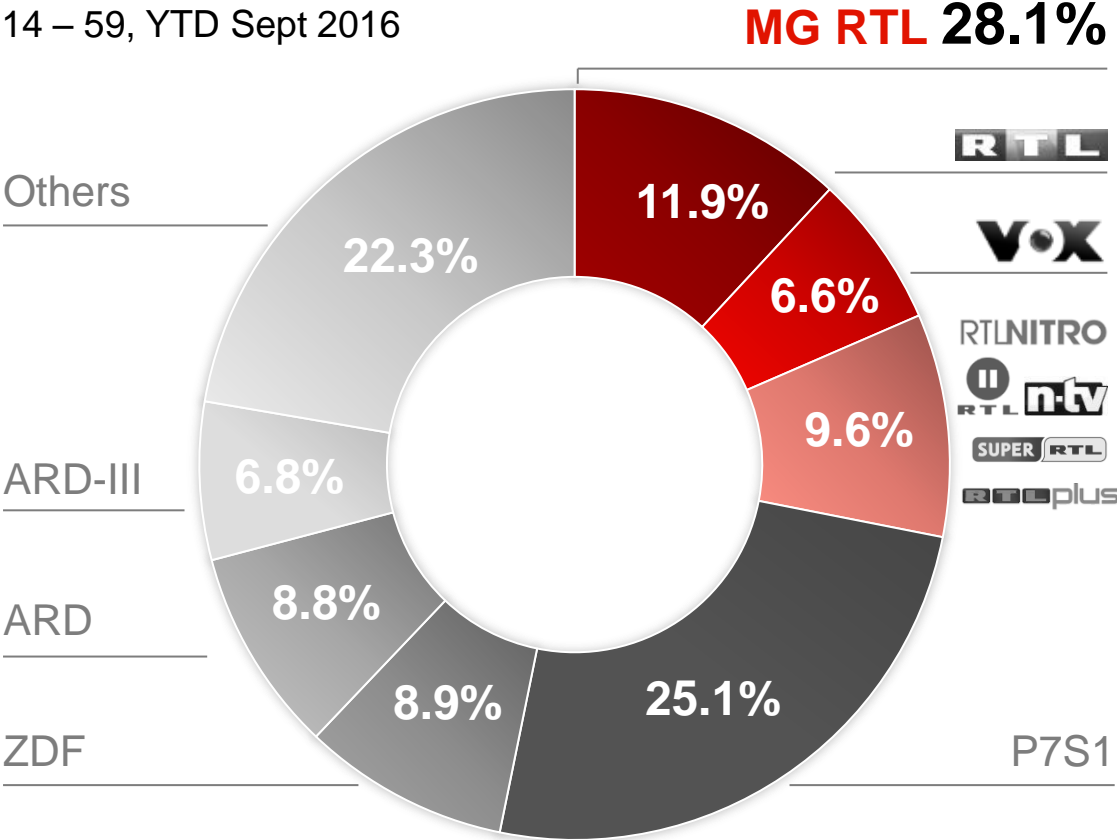


Source: AGF in cooperation with GfK
 Note: MG RTL De including RTL II and Super RTL

Mediengruppe RTL Deutschland

And increased leadership in key timeslots

FAMILY OF CHANNELS
14 – 59, YTD Sept 2016



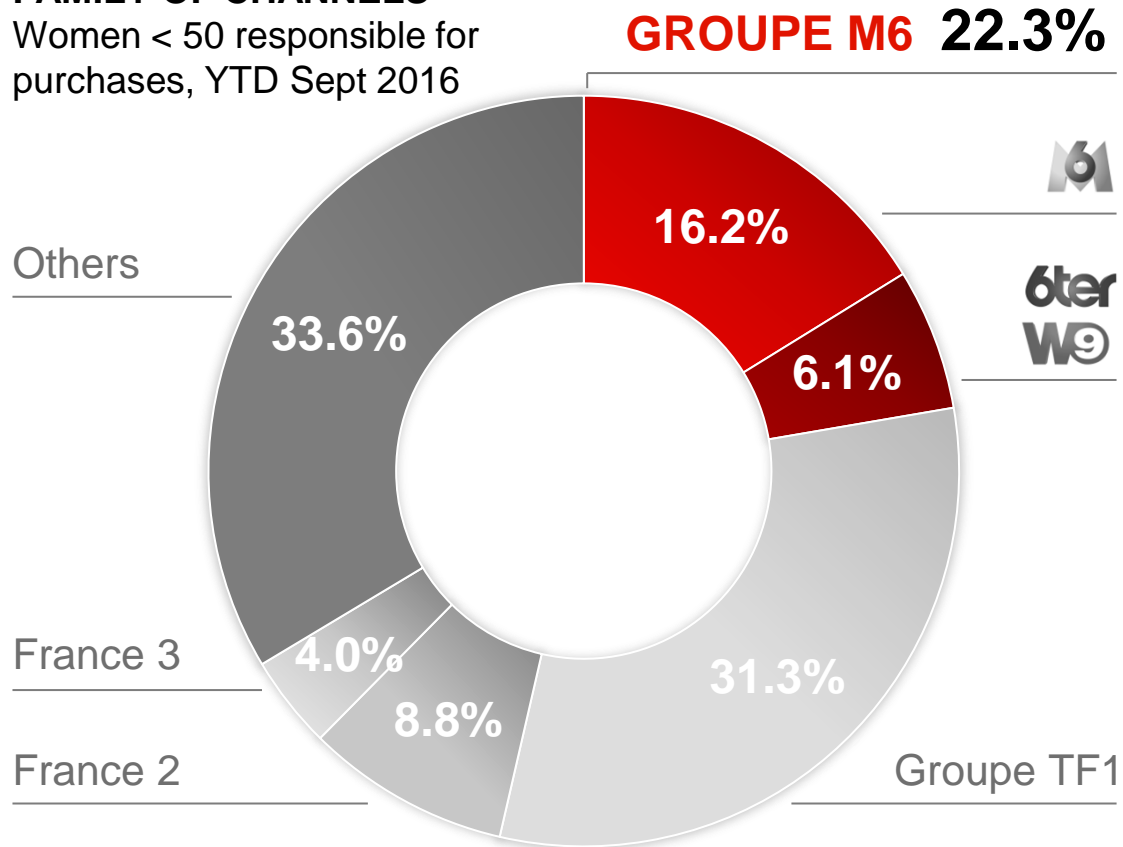
Source: AGF in cooperation with GfK
Note: MG RTL De including RTL II and Super RTL

Groupe M6

Outperforming in advertising and audience share

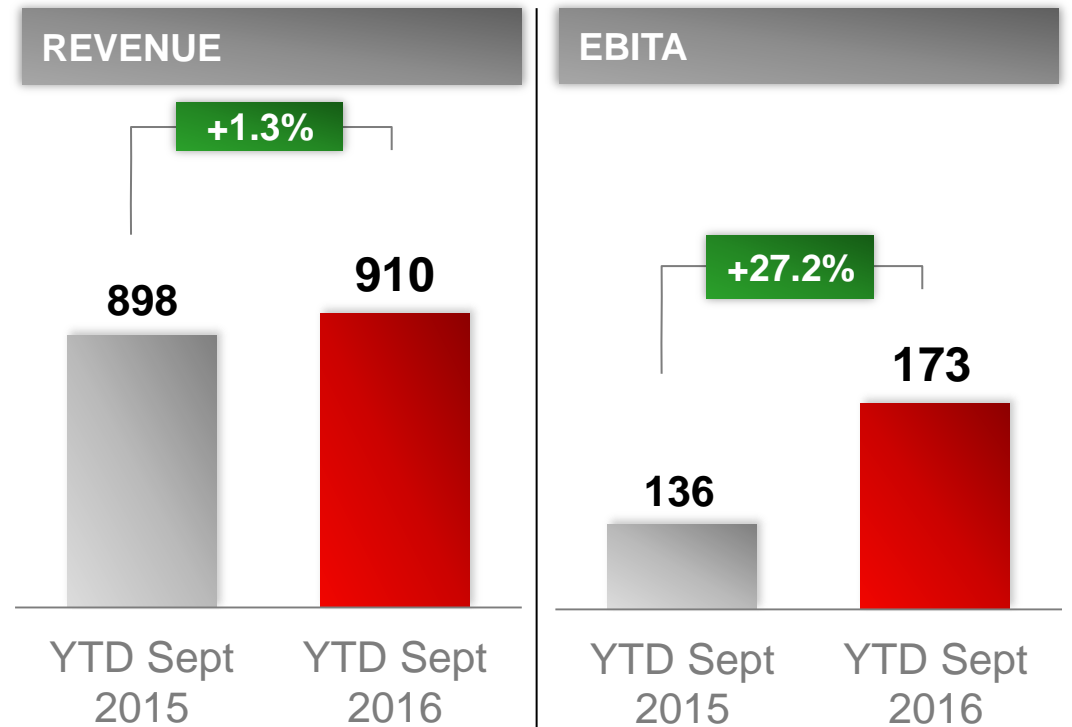
FAMILY OF CHANNELS

Women < 50 responsible for purchases, YTD Sept 2016



KEY FINANCIALS

In € million



Source: Médiamétrie

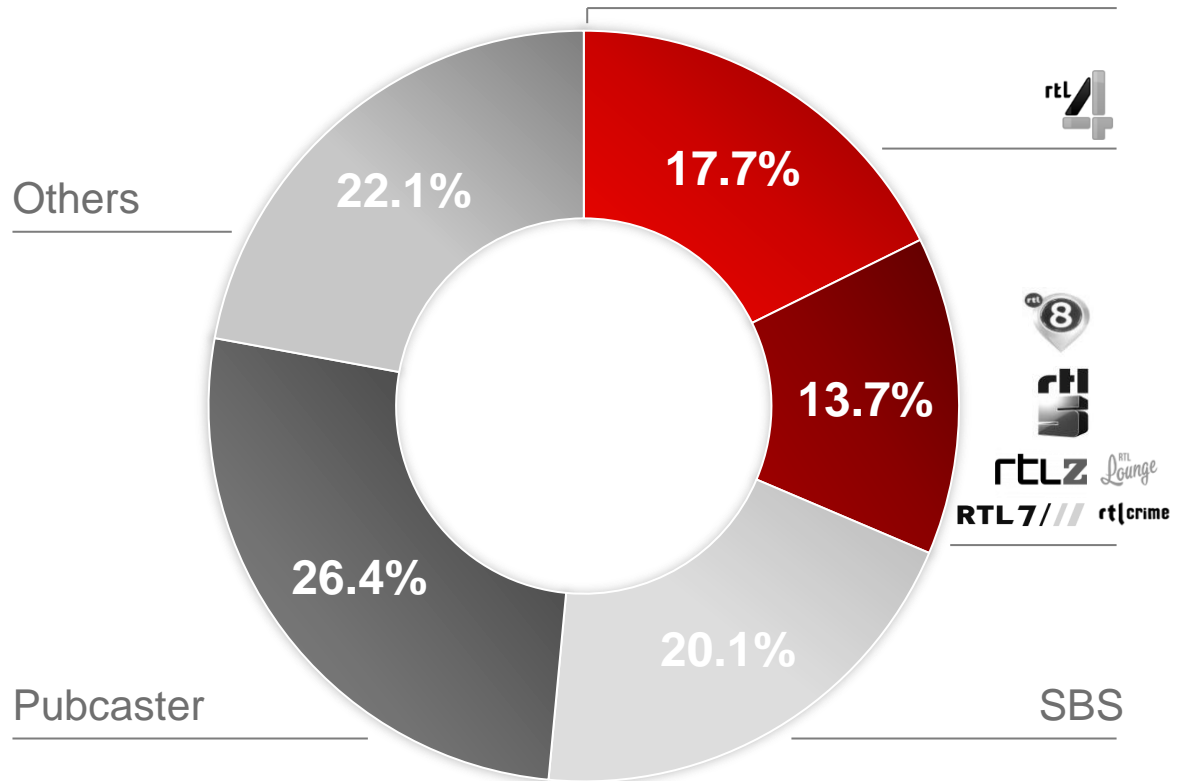
Groupe M6: M6, W9 and 6ter; TF1 Group: TF1, TMC, NT1 and HD1

RTL Nederland

Solid performance in difficult ad market

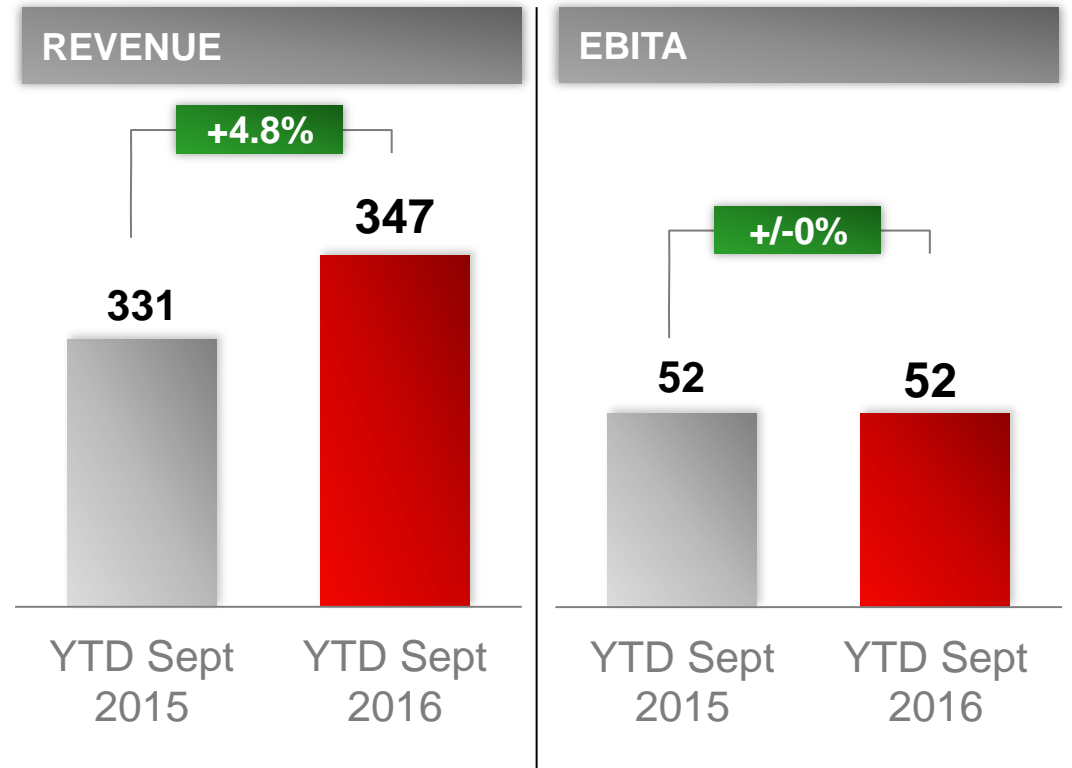
FAMILY OF CHANNELS

20 – 49, Primetime YTD Sept 2016 **RTL Nederland 31.4%**



KEY FINANCIALS

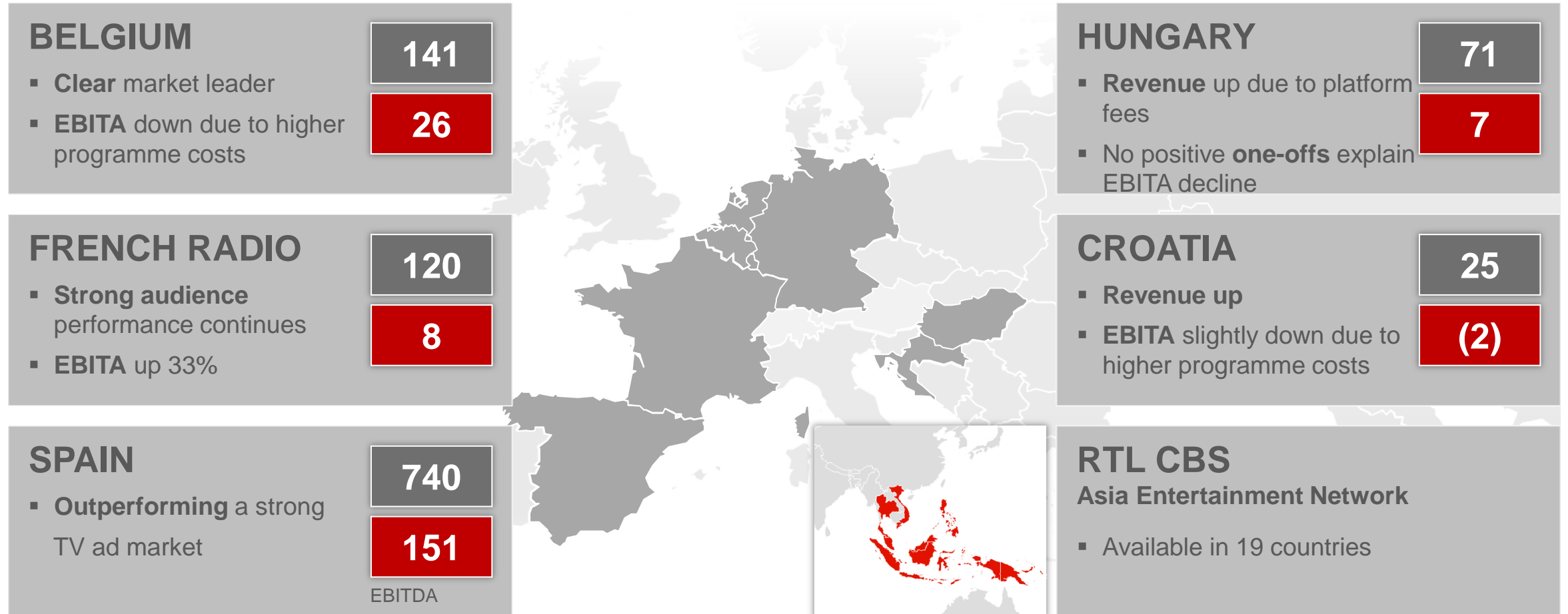
(in € million)



Source: SKO

Other markets

9 months 2016: other territories report mixed performance



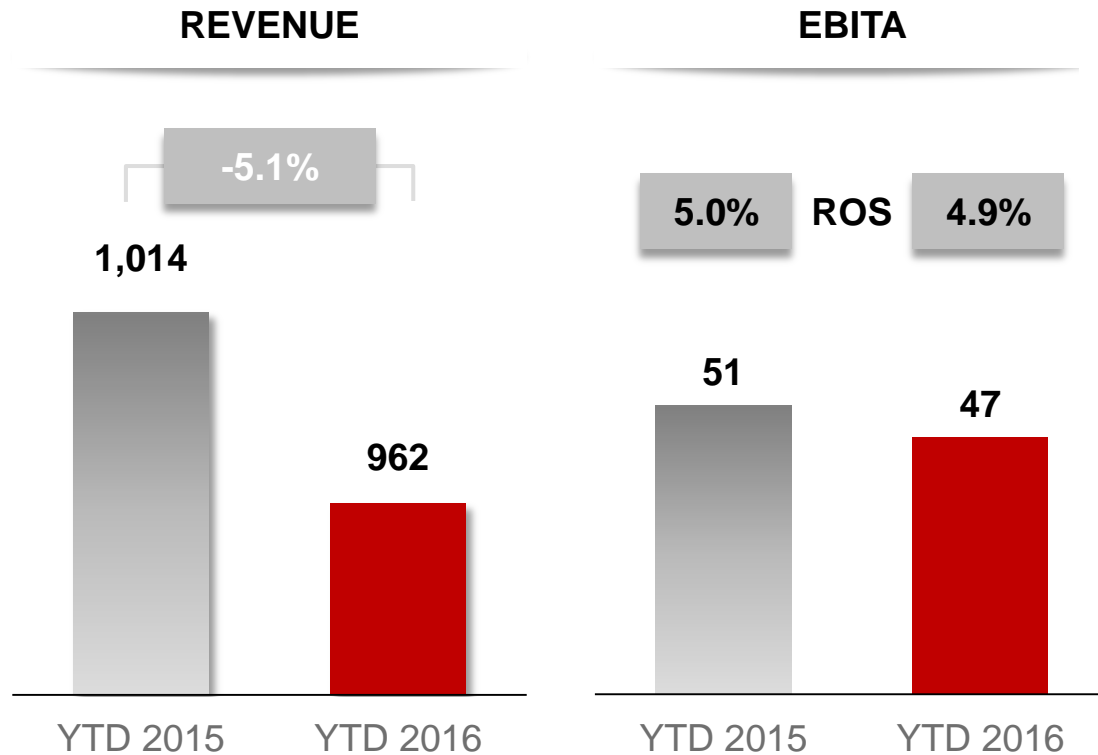
■ Revenue ■ EBITA, in € million

FremantleMedia

Weaker 3rd quarter but on track to meet full year guidance

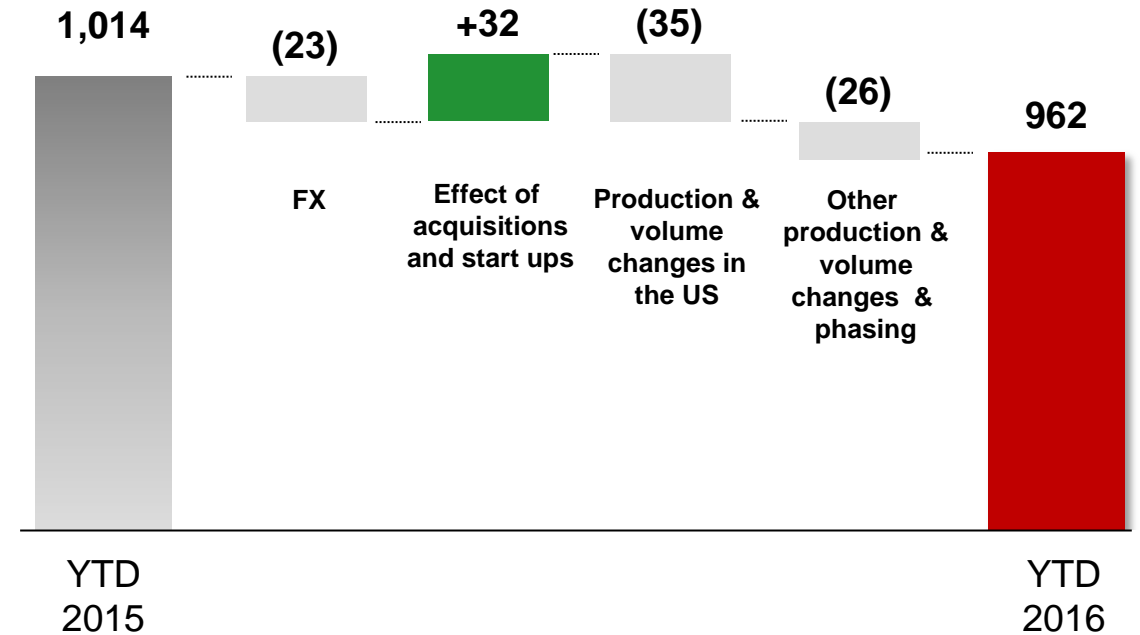
KEY FINANCIALS

(in € million)



REVENUE BRIDGE

YTD 2015 – YTD 2016 (in € million)



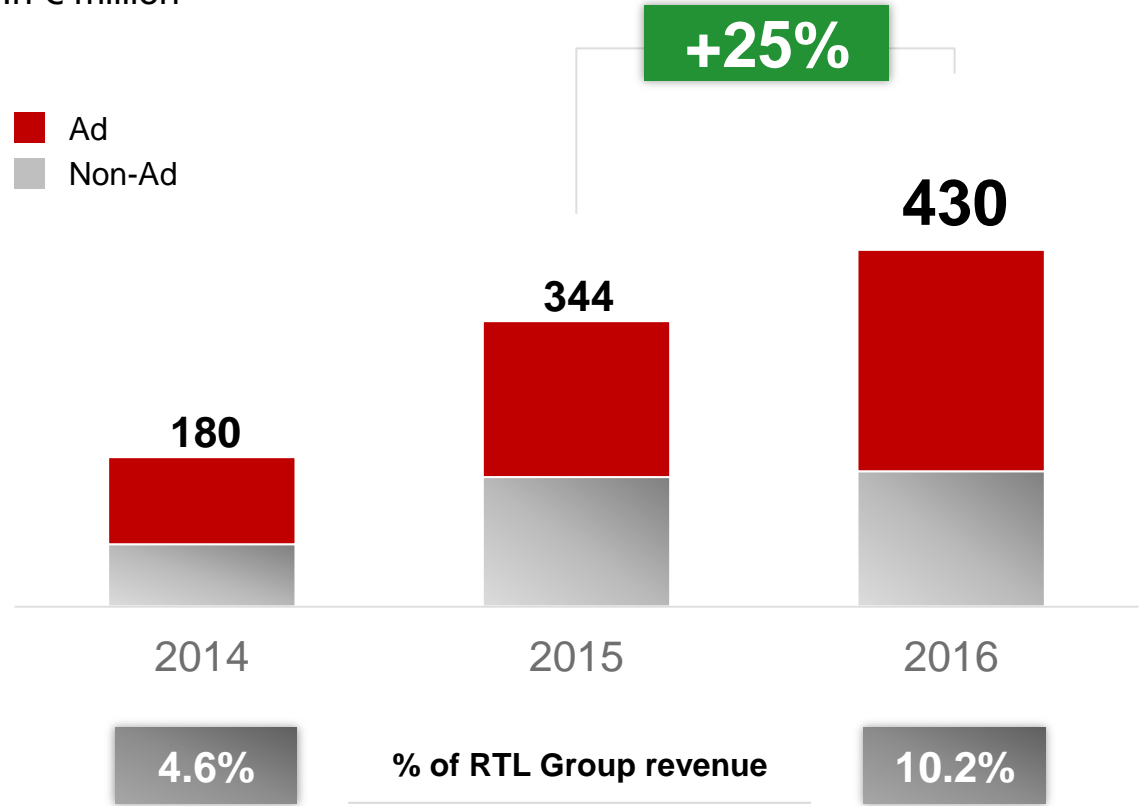
YTD represents 9 months to 30 September

Digital revenue

Continuing to show strong growth

DIGITAL REVENUE, YTD September

In € million



	YoY revenue growth
	+133%
	+46%
	+11%

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Outlook 2016

RTL Group

Outlook unchanged for 2016

1

Revenue expected to grow moderately



2

Reported EBITA expected to show slight growth



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Backup

RTL Group's revenue mix is well diversified

RTL GROUP'S REVENUE SPLIT TO 30 SEPTEMBER 2016

In %

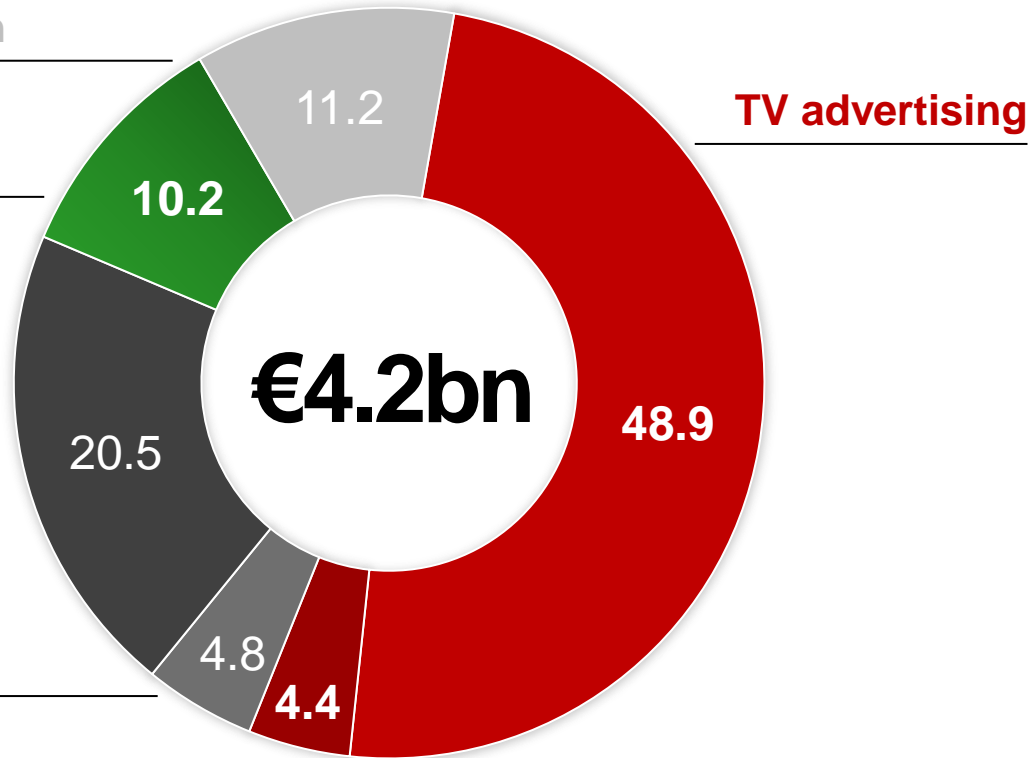
Other diversification

Digital

Content

Platform revenue

Radio advertising



DEPENDENCY FROM TV ADVERTISING

- TV advertising
- Other revenue

