



13 and 14 November 2012

Andrew Buckhurst



The leading European entertainment network



Agenda

- **INTRODUCTION**
- Business Review
- Strategy Update

RTL Group
Q3 2012 : highlights



Up
4.0%

REVENUE
continuing operations
EUR 4.1 billion

REPORTED EBITA
continuing operations
EUR 671 million

Qtr 3 EBITA MARGIN
12.7% - stable

Qtr 3 EBITA
EUR 165 million

Up
5.8%

2012 : integration Hu cable channels, successful launch RTL Nitro and RTL Telekids, new CEO at FremantleMedia. India (5/11) with 6ter to come

Strong audience shares in major markets
GERMANY, FRANCE, NETHERLANDS, BELGIUM

NET CASH POSITION
EUR 769 million

CASH CONVERSION
108%

> SOLID RESULTS IN TOUGH ECONOMIC ENVIRONMENT

Agenda

- Introduction
- **BUSINESS REVIEW**
- Strategy Update

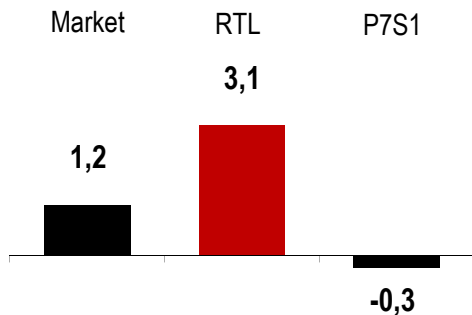
Germany & France

Advertising and audiences 2012



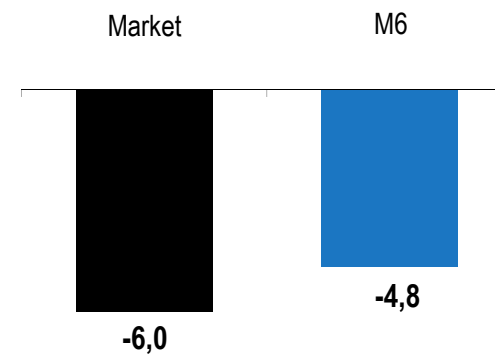
NET ADVERTISING MARKET DEVELOPMENT (in %)

Jan-Sep 2012 vs Jan-Sep 2011



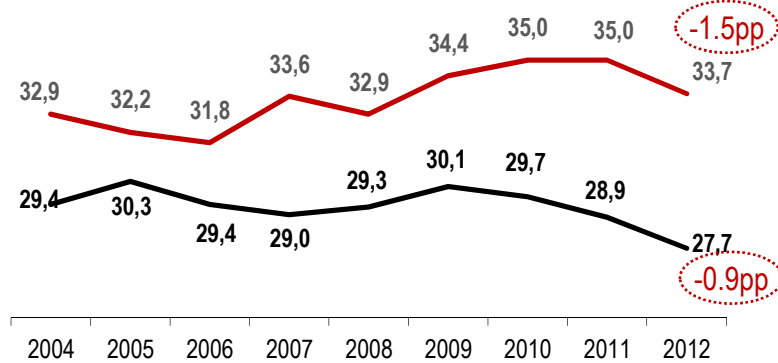
NET ADVERTISING MARKET DEVELOPMENT (in %)

Jan-Sep 2012 vs Jan-Sep 2011



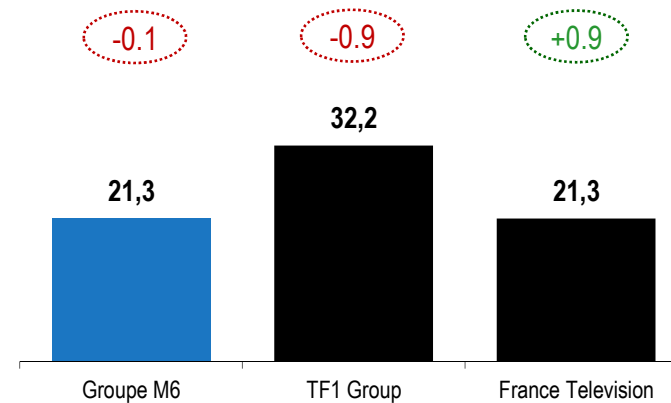
YTD AUDIENCE SHARE – FAMILY OF CHANNELS

14-49 (in %)



YTD AUDIENCE SHARE – FAMILY OF CHANNELS

HOUSEWIVES <50 ALL DAY (in %)



Source: RTL Group estimates, Nielsen, delta versus same period 2011 (ytd Oct)

Source: RTL Group estimates, Médiamétrie, delta versus same period 2011 (ytd Oct)
 Groupe M6 : M6 and W9; TF1 Group : TF1, TMC and NT1; France TV : Fr2-5

KEY FACTS 2012

- **Core franchises remain strong**

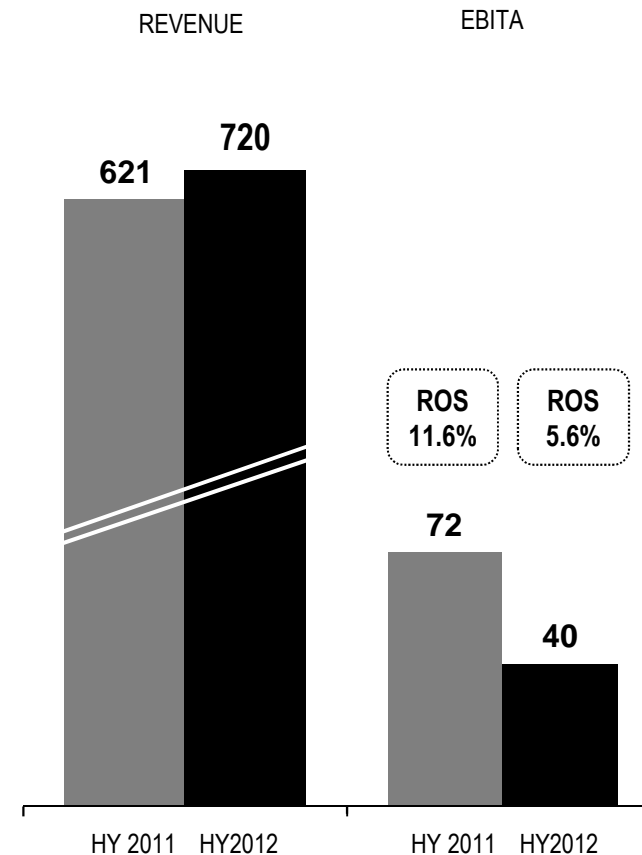
- *American Idol*: number one entertainment series in the US for the past nine years
- *L'amour est dans le pré*: makes M6 the market leader in its time slot
- *Britain's Got Talent*: number one show in the UK for 2012



- **Worldwide presence in production, distribution and digital**

- production: 9,200 hours of TV programming across 58 countries per year
- distribution: catalogue with more than 20,000 hours of programming, licensed to broadcasters in over 180 countries

KEY FINANCIALS (in € million)

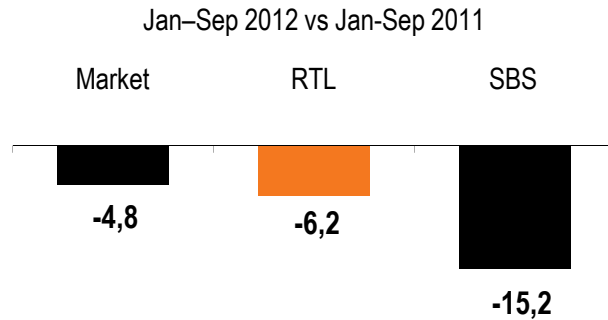


Netherlands & Belgium

Advertising and audiences 2012

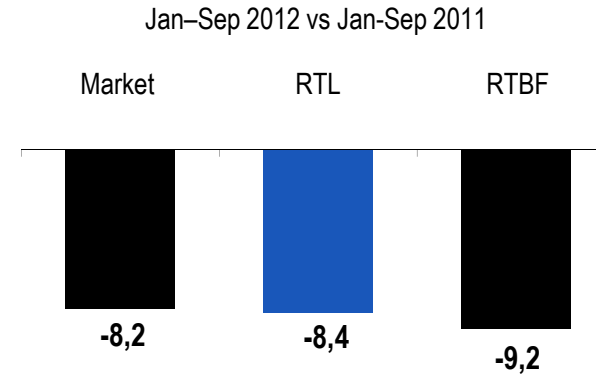


NET TV ADVERTISING MARKET DEVELOPMENT (in %)



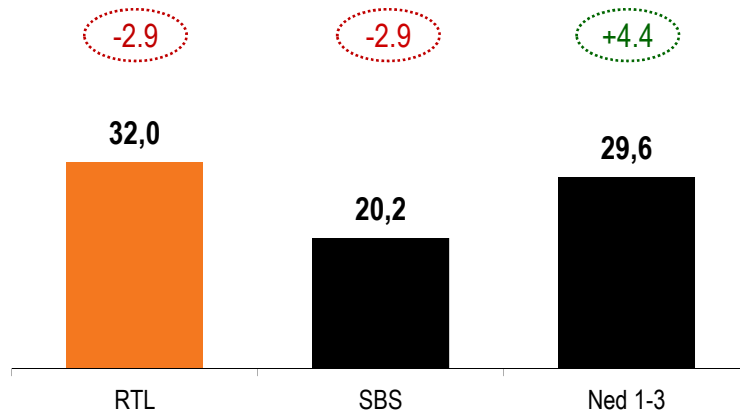
Source : RTL Group estimates

NET TV ADVERTISING MARKET DEVELOPMENT (in %)



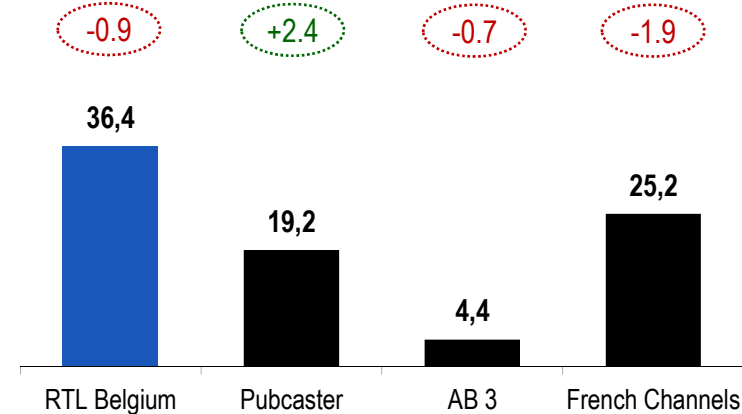
Source : RTL Group estimates

YTD AUDIENCE SHARE – FAMILY OF CHANNELS



Source : RTL Group estimates, 20-49, PRIMETIME (in %) : delta versus same period 2011 (ytd Oct)

YTD TV AUDIENCE SHARE – FAMILY OF CHANNELS



Source : RTL Group estimates, shoppers 18-54, PRIMETIME (in %) : delta versus same period 2011 (ytd Sep)

Key developments 2012 (1/2)

CORE



ONGOING
Integration and re-positioning of
7 cable channels in Hungary



MARCH
Licence awarded to **Groupe M6**
for launch of 6ter



APRIL
Successful launch of RTL Nitro
by **MG RTL Deutschland**



SEPTEMBER
RTL Nederland
Launch new digital channel



NOVEMBER
Launch of first channel in **India**

CONTENT

MARCH
Global first look deal for **distribution rights** to Hulu's original programming



SINCE MAY
FremantleMedia launches
Youtube channels



JULY
Partnership with Random House
for new **TV programming**



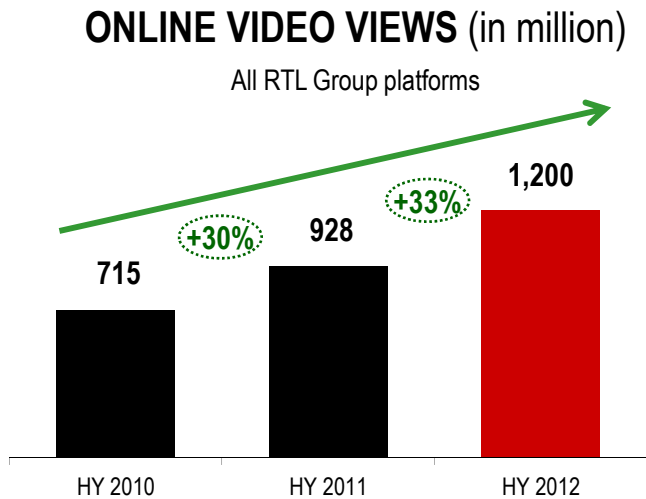
New CEO since 1 July:
Cécile Frot-Coutaz

CONTINUED INVESTMENTS IN NEW CHANNELS AND CONTENT BUSINESS

Key developments 2012 (2/2)

DIGITAL

NON-LINEAR TV



Examples:



MOBILE SERVICES



- More than 220 mobile applications launched
- 65 million downloads to date
- Mobile video views in H1/2012:
+92% in Germany, +99% in France
- Acquisition of Videostrip – the Netherlands biggest online video-advertising network

RTL GROUP FURTHER GROWS ITS DIGITAL ACTIVITIES

Agenda

- Introduction
- Business Review
- **STRATEGY UPDATE**

Strategic focus will be on three key areas





Core: growth opportunities for TV broadcasting business



STRENGTHEN

family of channels
in core markets

LAUNCHED
APRIL 2012

RTL NITRO

LAUNCH
END 2012

bter

DRIVE

new revenue stream
opportunities: platform
fees, pay-TV and
subscription

Steady progress in Germany
on platform fees coupled
with strong development
of **HD+** offer

SELECTIVE GROWTH

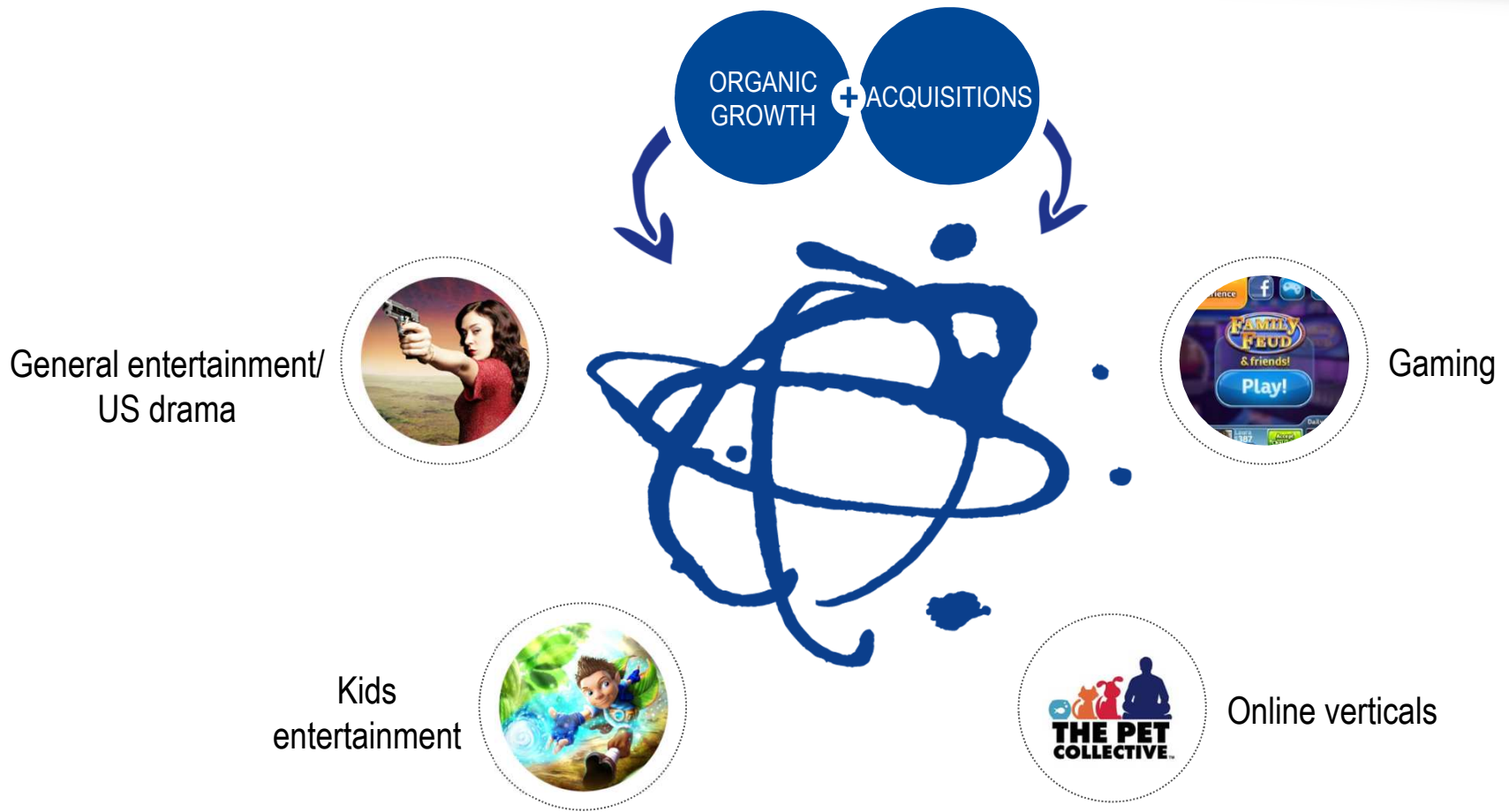
in new territories



INVESTMENTS IN EXISTING AND NEW MARKETS, GROW NON-ADVERTISING REVENUE



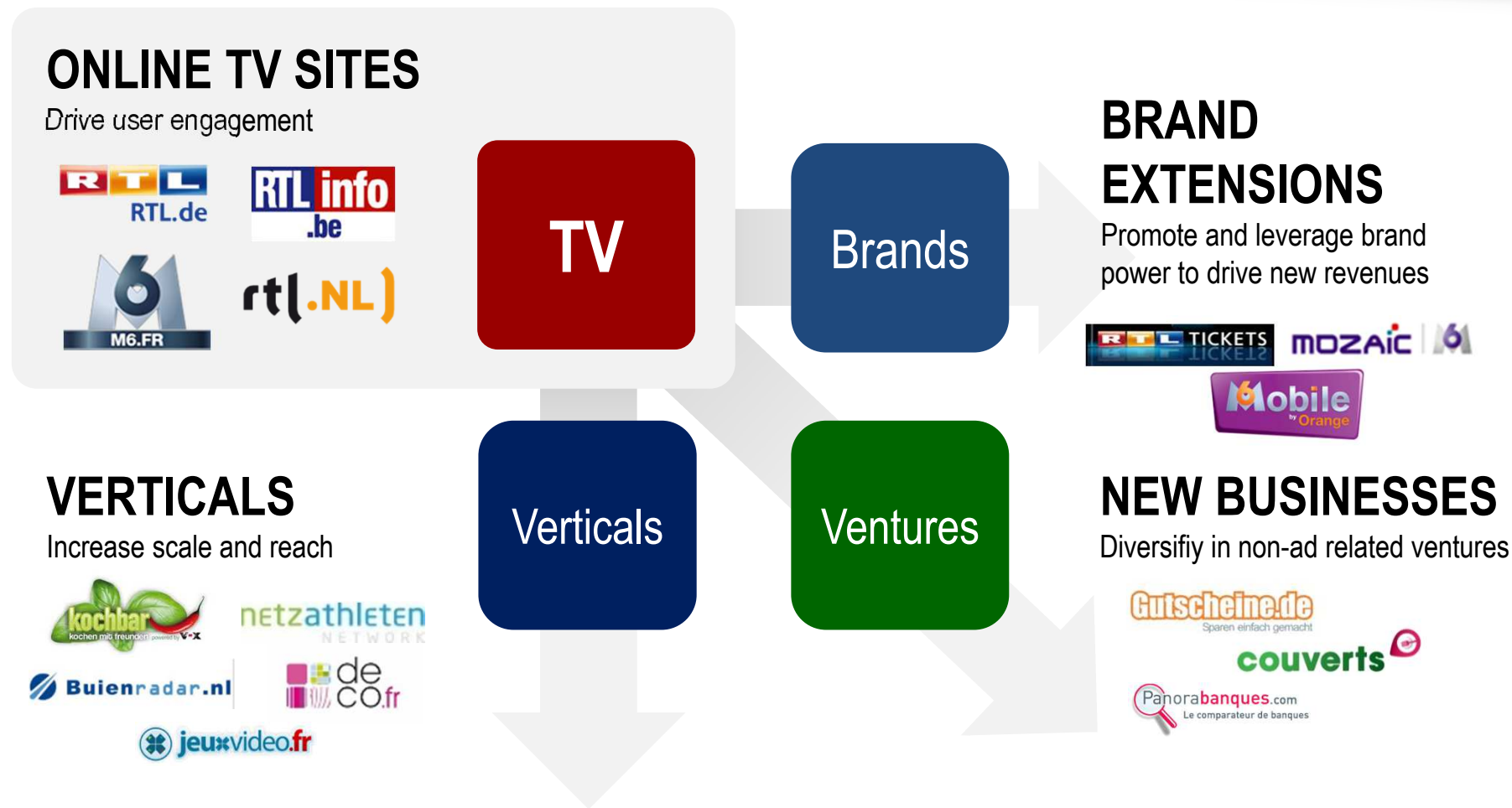
Content: expand FremantleMedia in new bussiness areas



GROWTH IN NEW INTELLECTUAL PROPERTY ALIGNED WITH NEW EXECUTION CAPABILITIES



Digital: further expand and develop online portfolio, brands and ventures



...BUT WE CAN ALSO CREATE NEW BRANDS WITH THE SUPPORT OF TV PROMOTION

Conclusion: many growth opportunities, clear strategy

