

TV Newsletter July 2019

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VIEWERSHIP DEVELOPEMENTS

July 2019

- **Average minute RTG is decreasing** which is in line with YOY seasonal movements
- **Nova TV** group continues to **dominate with 27,16%** of audience SHR% in Jan-Jul
- **Nova TV** group leads in both **All day** and **Prime time** audience SHR%
- The **most popular** programs – **Movies (Nova TV & RTL)** and **Plodovi zemlje (domestic agricultural show)**

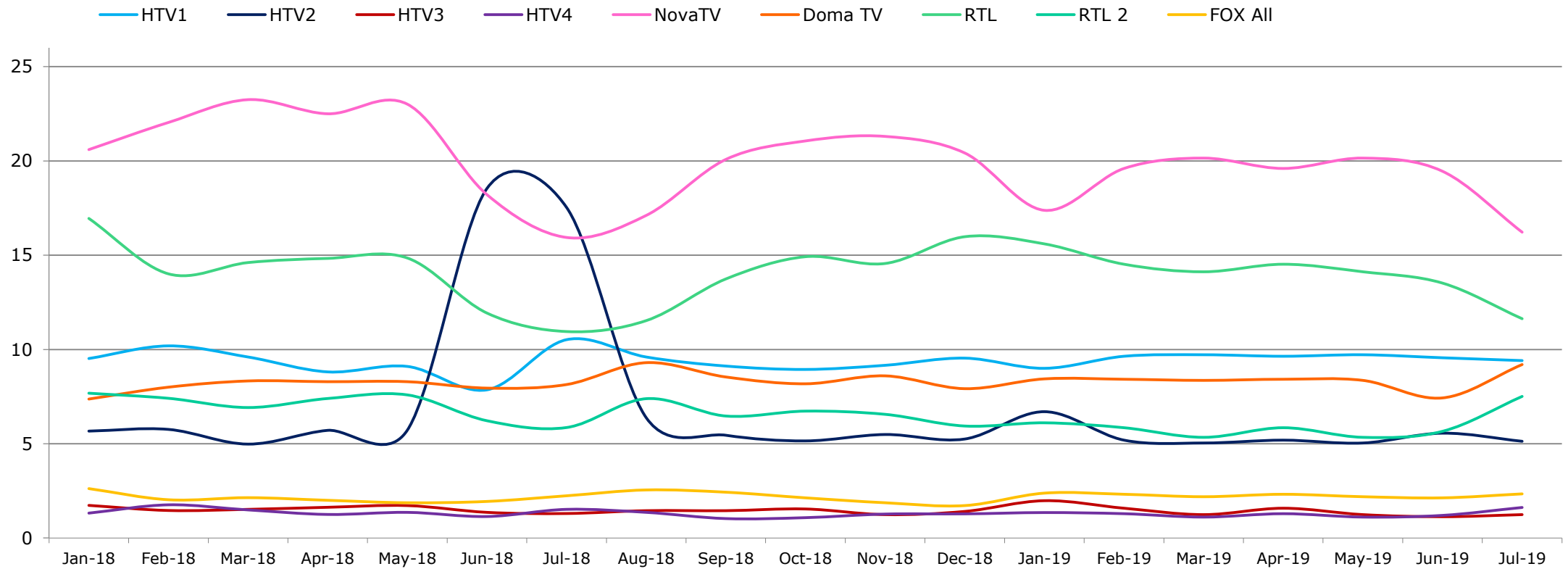
NOVELTIES, HIGHLIGHTS....

- **Kong – Otok Iubanja** - movie, aired on July 7th, had an audience SHR% of 29,13%
- **Arena Sport announced „Live virtual studio“** and new advertising elements
- **Arena Sport** bought rights to air **NBA season 2019./2020.**
- **N1 Television**, IPTV, has set an audience SHR% record since its beginning
 - SHR% 1,84

TV Market shares

NATIONAL & CABLE

Monthly evolution – January 2018 – July 2019

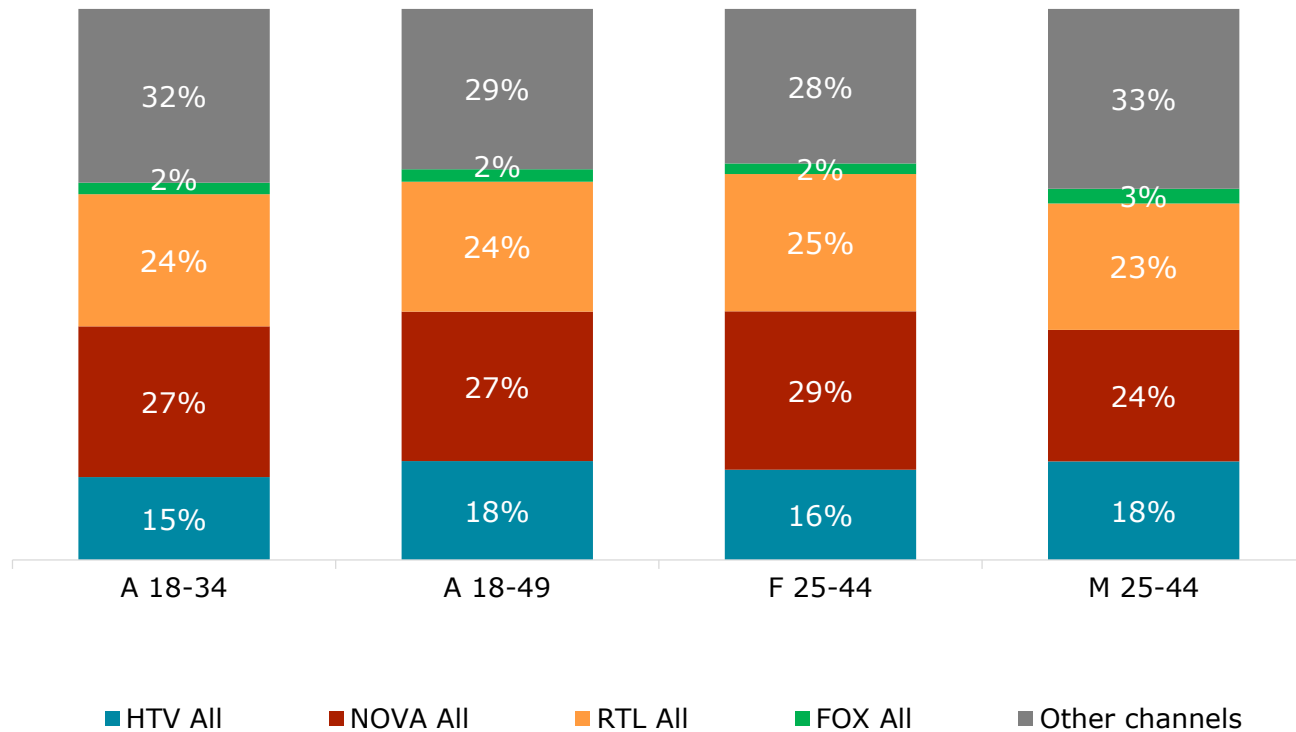


Sources: Nielsen Audience Measurement, Target: All 18-49; Period: January 2018 - July 2019

All day audience share

Nova TV and RTL dominating

ALL DAY CHANNELS SHARE

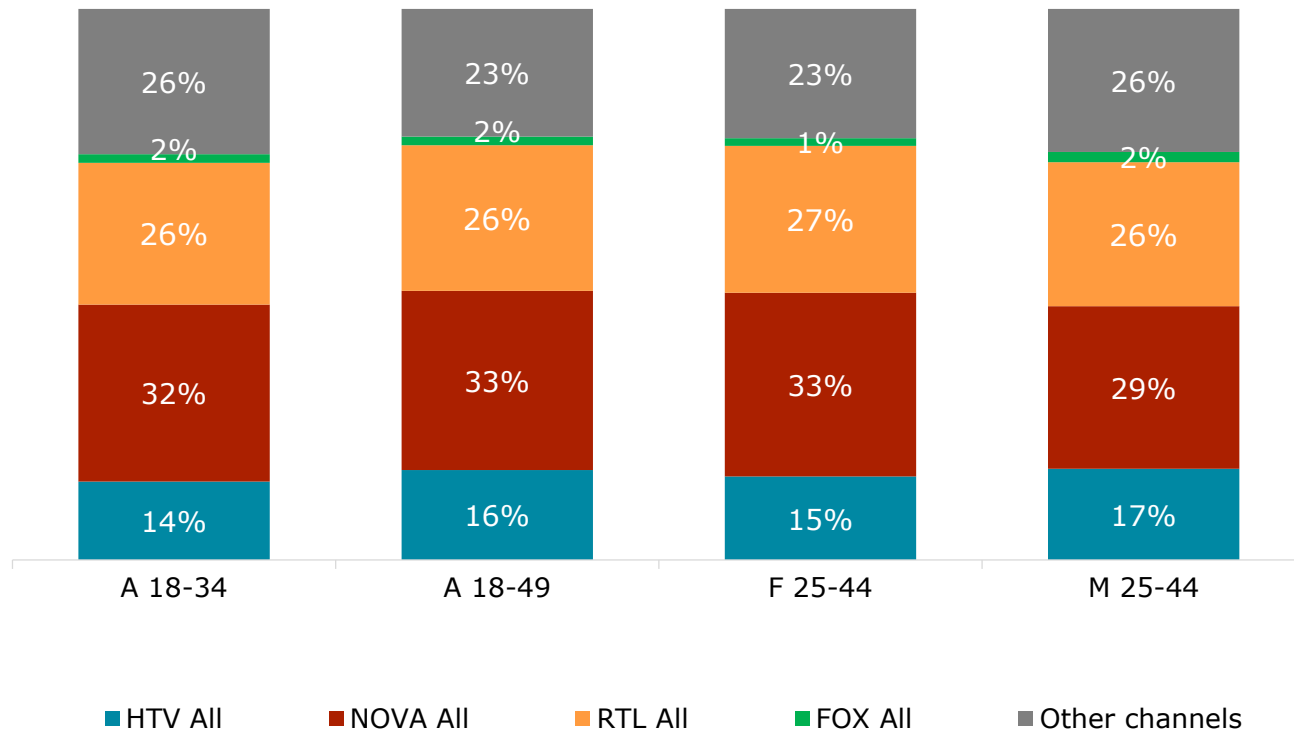


Nova TV group with the higher share than RTL group on all target groups.

Prime time (19-23) audience share

Nova TV and RTL dominating











PRIME TIME CHANNELS SHARE



Strong Nova TV dominance in prime-time, especially on female audience.

Although RTL's share on male target group is slightly lower during the all day, in prime-time Nova TV has the significant lead on male audience.

The most popular 10 programs in July

		AMR% A 18-34	AMR% A 18-49	AMR% F 25-44	AMR% M 25-44	SHR% A 18-34	SHR% A 18-49	SHR% F 25-44	SHR% M 25-44
	KONG: OTOK LUBANJA - AMERICKI AKCIJSKI FILM	2,69%	6,48%	6,95%	8,18%	21,01%	29,13%	27,79%	32,47%
	INFERNO - AMERICKO MADARSKI AKCIJSKI PUSTOLOVNI FILM	3,99%	5,99%	7,66%	6,36%	28,39%	29,26%	34,97%	30,17%
	MR. BEAN NA PRAZNICIMA - BRITANSKA KOMEDIJA	2,62%	4,99%	6,12%	5,88%	18,81%	22,83%	21,58%	31,00%
	JAMES BOND 007: ZRNO UTJEHE - BRITANSKO AMERICKI AKCIJSKI FILM	2,14%	4,81%	5,27%	4,77%	17,90%	22,55%	22,10%	20,41%
	BATMAN V SUPERMAN: ZORA PRAVEDNIKA - AMERICKI AKCIJSKI FILM	2,98%	4,81%	5,07%	6,62%	21,55%	21,84%	20,20%	27,84%
	PLODOVI ZEMLJE - EMISIJA O POLJOPRIVREDI	3,50%	4,74%	4,56%	5,30%	23,17%	27,86%	24,56%	29,63%
	POSljednja BITKA - AMERICKI FILM	3,05%	4,46%	5,03%	5,40%	18,37%	17,60%	16,80%	22,12%
	ISTANBULSKA NEVJESTA - TURSKA DRAMSKA SERIJA	3,14%	4,43%	6,69%	3,66%	20,52%	18,89%	22,36%	16,76%
	LUD, ZBUNJEN, NORMALAN - HUMORISTICNA SERIJA	3,34%	4,36%	5,46%	4,24%	22,07%	19,64%	20,56%	19,75%
	JAMES BOND 007: CASINO ROYALE - AMERICKO BRITANSKO NJEMACKI FILM	3,07%	4,27%	4,32%	3,65%	29,71%	24,31%	21,94%	19,90%

TOP 20 ADVERTISERS

JAN-JUL 2019 VS JAN-JUL 2018

- Retailers are the most active in YTD period with Kaufland being the No.1 advertiser in GRP pressure (23.061 GRPs), followed by Konzum and Lidl; all with decreased number of GRPs compared to the same period LY
- Sandoz increased their presence on TV by 52% in terms of GRPs in YTD 2019 compared to 2018
- In July, most active advertisers are Dukat, Coca Cola, Procter & Gamble and Henkel

Rank	Year Advertiser\Variables	2018	2018	2019	2019	GRP Difference
		GRP	Eq. GRP	GRP	Eq. GRP	
1	KAUFLAND	25.485	16.815	23.061	14.848	-10%
2	KONZUM PLUS D.O.O.	24.496	15.117	22.973	15.069	-6%
3	LIDL	27.819	21.470	21.796	17.008	-22%
4	PROCTER & GAMBLE	29.255	19.543	21.004	13.505	-28%
5	T - HRVATSKI TELEKOM	20.327	14.206	20.712	15.729	2%
6	THE COCA-COLA COMPANY	19.345	15.214	19.622	15.353	1%
7	FERRERO	23.838	18.135	19.122	14.469	-20%
8	PLODINE	21.537	12.243	19.072	11.254	-11%
9	SPAR HRVATSKA D.O.O.	19.703	10.308	17.277	9.959	-12%
10	TELE2	17.149	17.708	17.161	15.659	0%
11	L'OREAL	20.724	15.540	17.063	12.654	-18%
12	SANDOZ	10.955	5.762	16.619	8.621	52%
13	A1 HRVATSKA D.O.O.	17.994	13.133	16.176	11.701	-10%
14	DUKAT	18.974	6.902	15.508	5.615	-18%
15	HENKEL	15.004	11.112	14.678	8.552	-2%
16	PODRAVKA	10.778	5.651	12.845	6.334	19%
17	BEIERSDORF	13.812	10.095	12.759	9.194	-8%
18	MONDELEZ	8.865	5.310	11.828	6.208	33%
19	TOMMY D.O.O.	9.631	5.691	11.397	6.655	18%
20	ERSTE BANK GROUP	9.680	5.829	10.689	9.192	10%

Thank you

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