



Morgan Stanley

Barcelona, 17 November 2016

RTL
GROUP

ENTERTAIN. INFORM. ENGAGE.

Agenda

1



**9 month
2016 highlights**

2



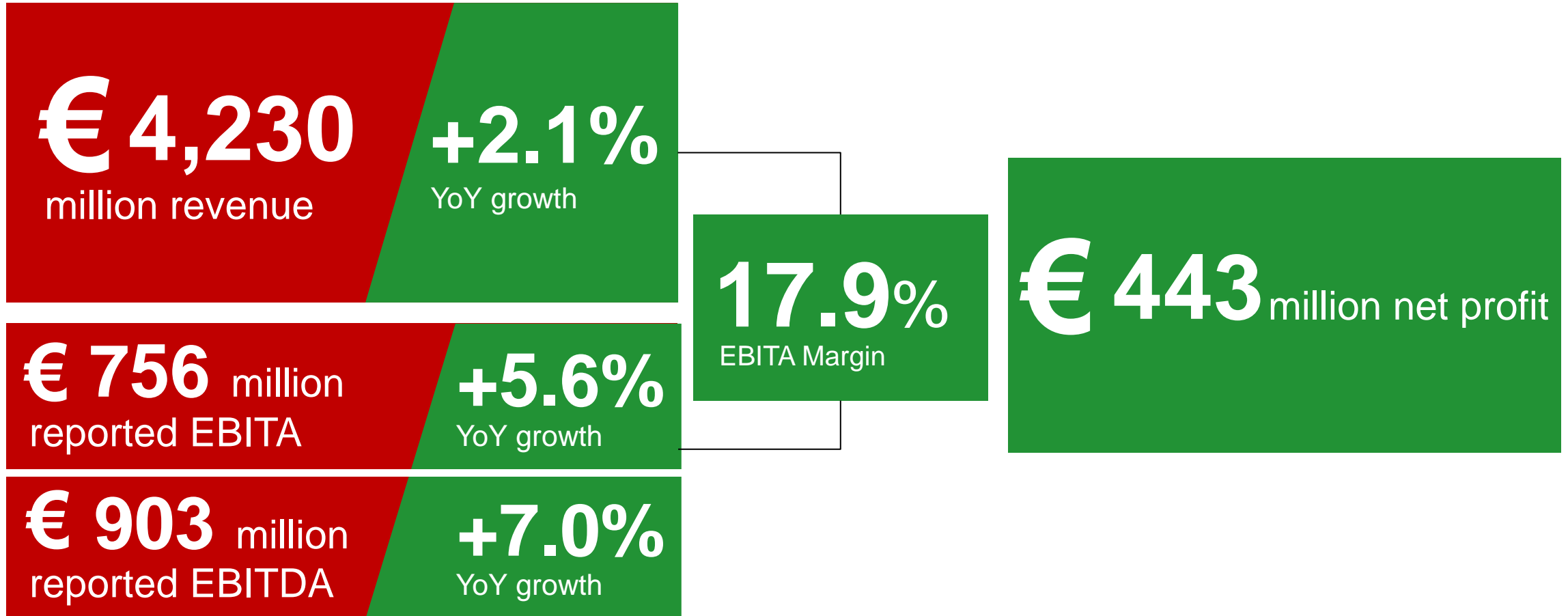
Business
segments

3



Outlook 2016

9 months 2016: Good financial performance continues



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9 month
2016 highlights

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Business
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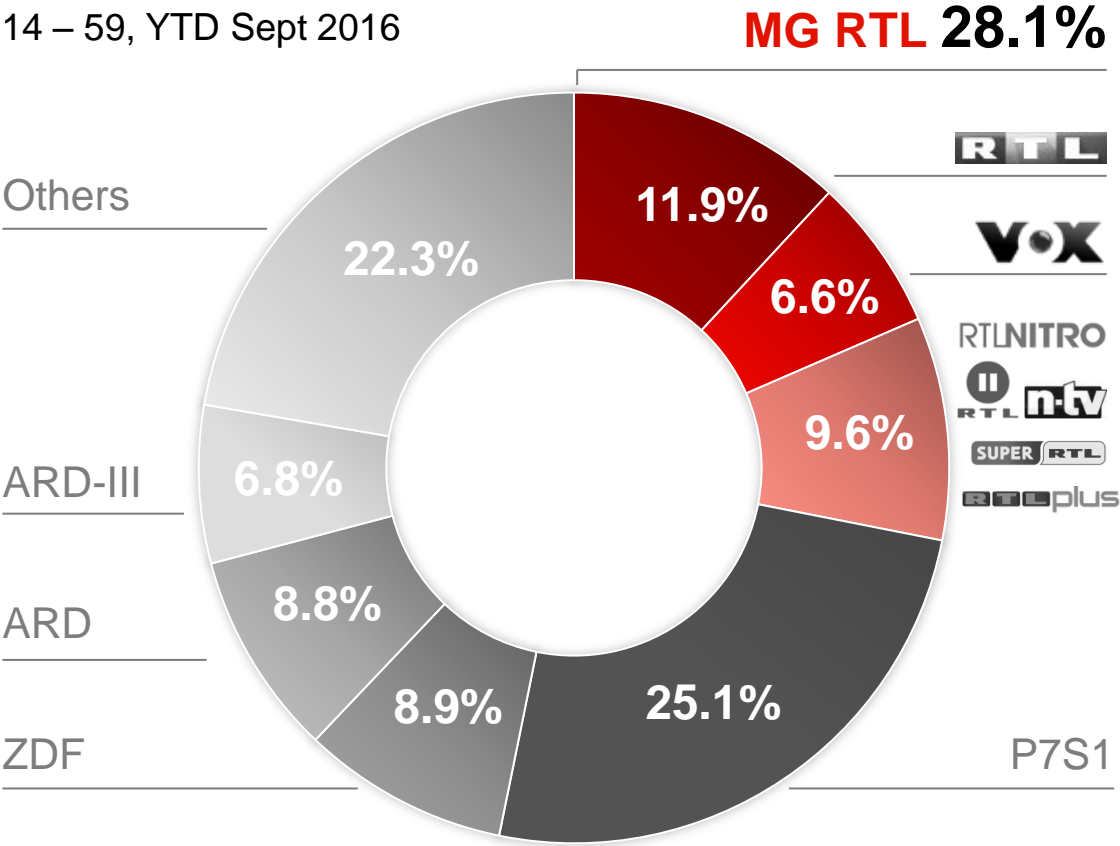
Outlook 2016

Mediengruppe RTL Deutschland

High audience shares and continued improvement in profitability

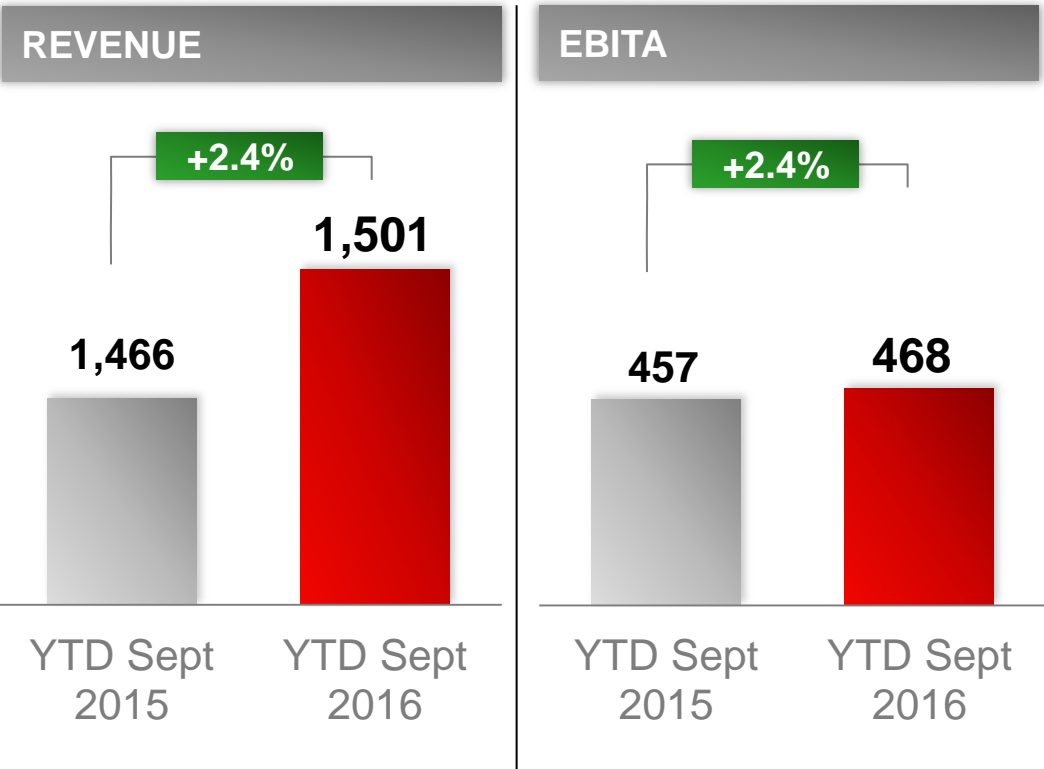
FAMILY OF CHANNELS

14 – 59, YTD Sept 2016



KEY FINANCIALS

In € million

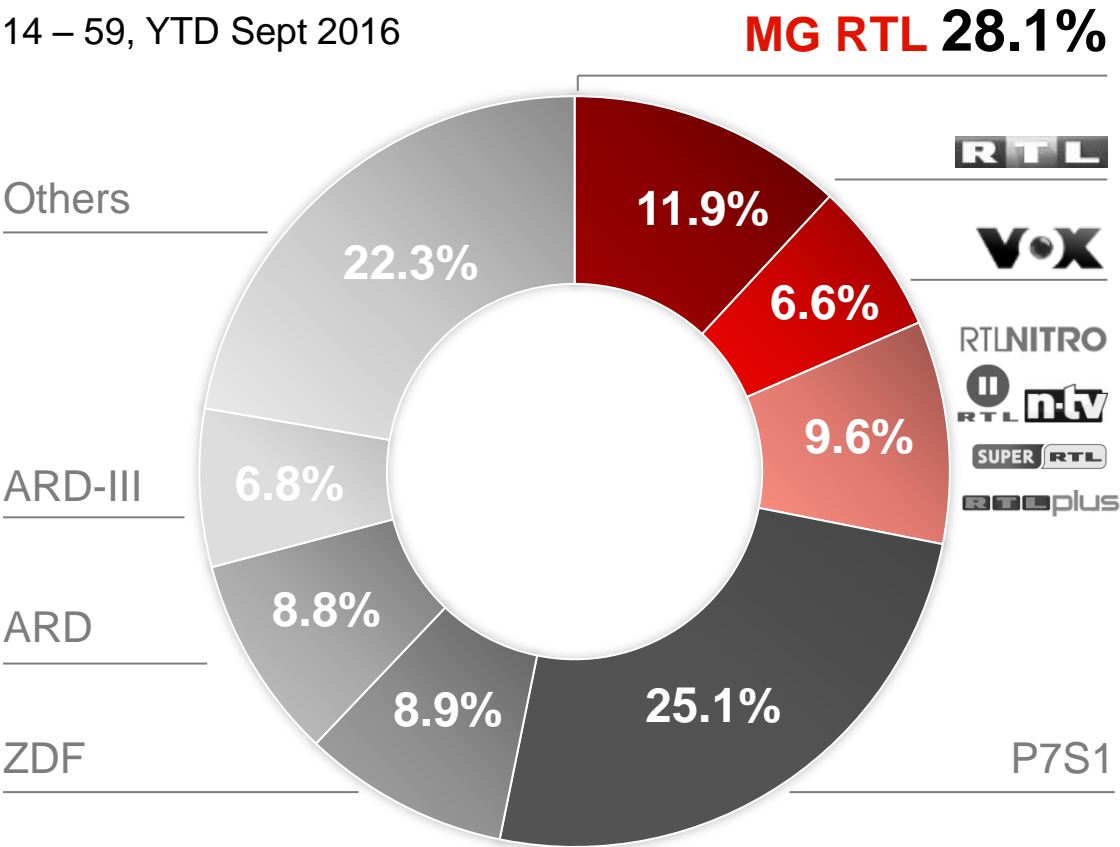


Source: AGF in cooperation with GfK
Note: MG RTL De including RTL II and Super RTL

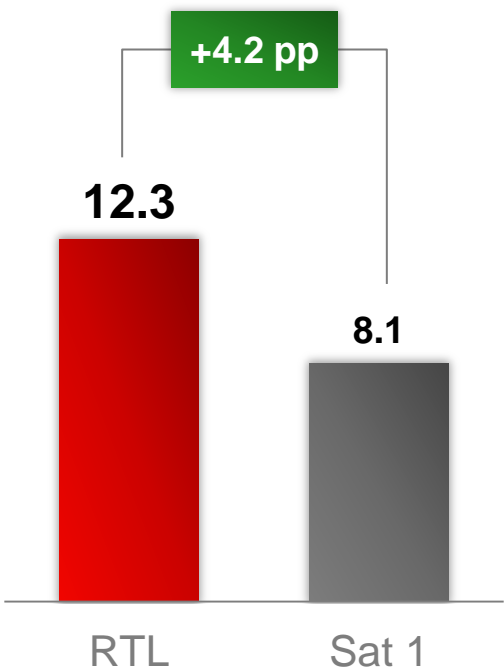
Mediengruppe RTL Deutschland

And increased leadership in key timeslots

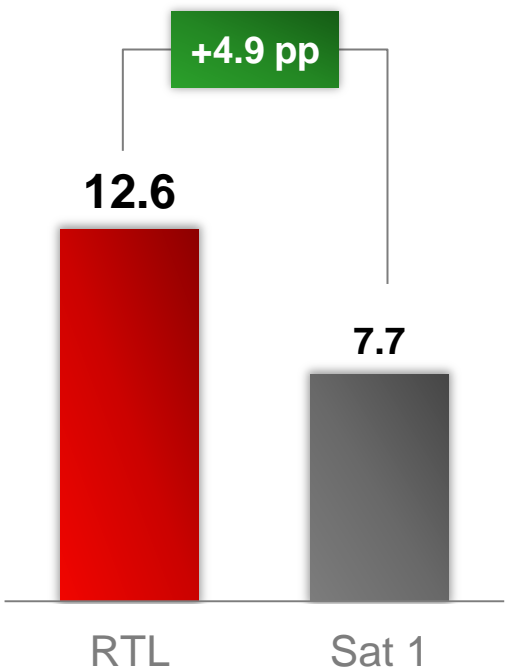
FAMILY OF CHANNELS
14 – 59, YTD Sept 2016



ACCESS PRIME TIME
(17 – 20h) 14 – 59 (in %)



PRIME TIME
(20 – 23h) 14 – 59 (in %)



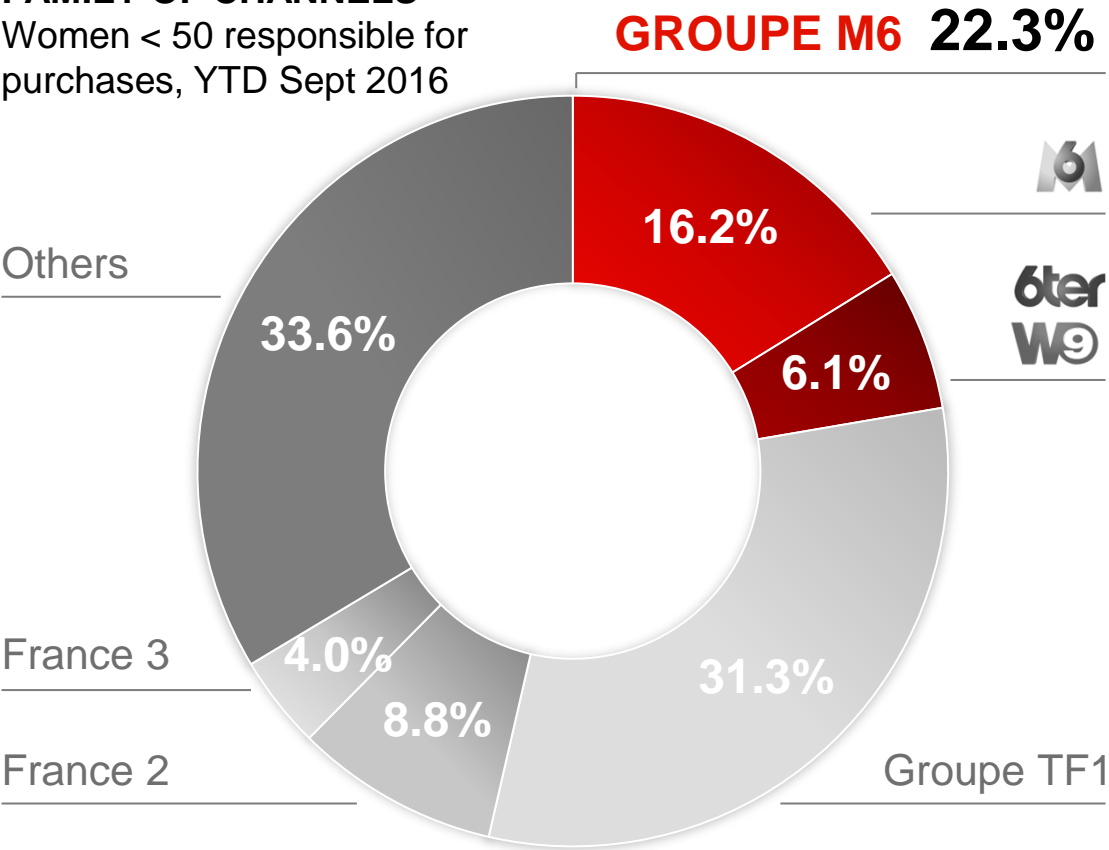
Source: AGF in cooperation with GfK
Note: MG RTL De including RTL II and Super RTL

Groupe M6

Outperforming in advertising and audience share

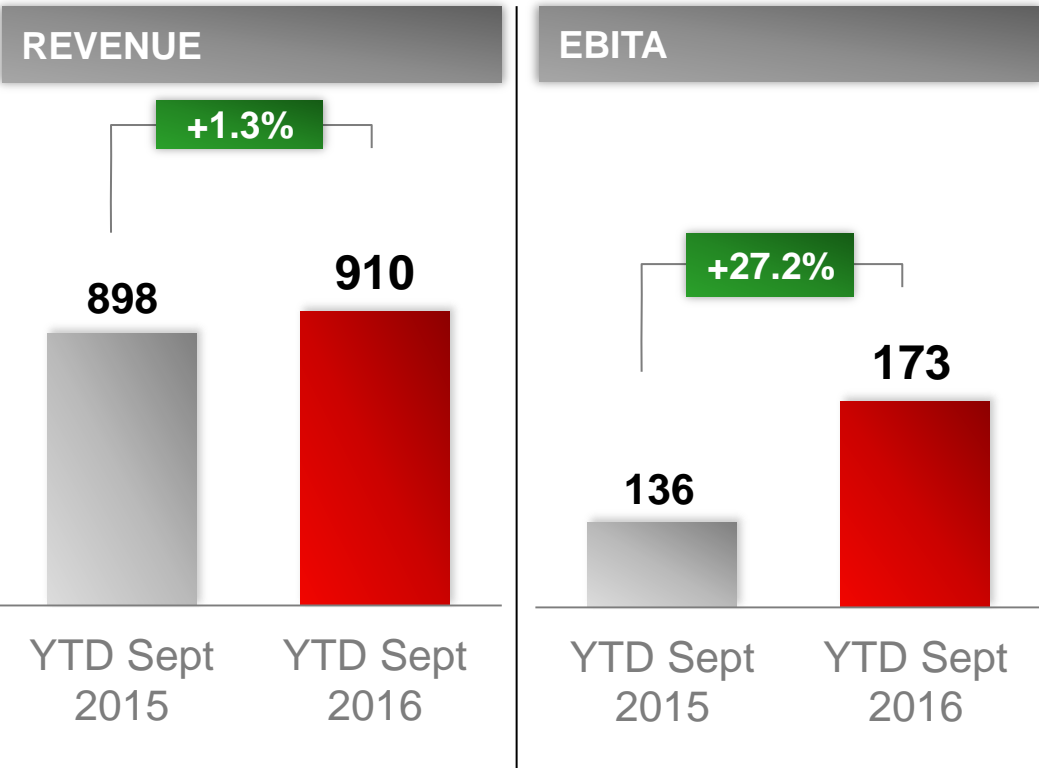
FAMILY OF CHANNELS

Women < 50 responsible for purchases, YTD Sept 2016



KEY FINANCIALS

In € million



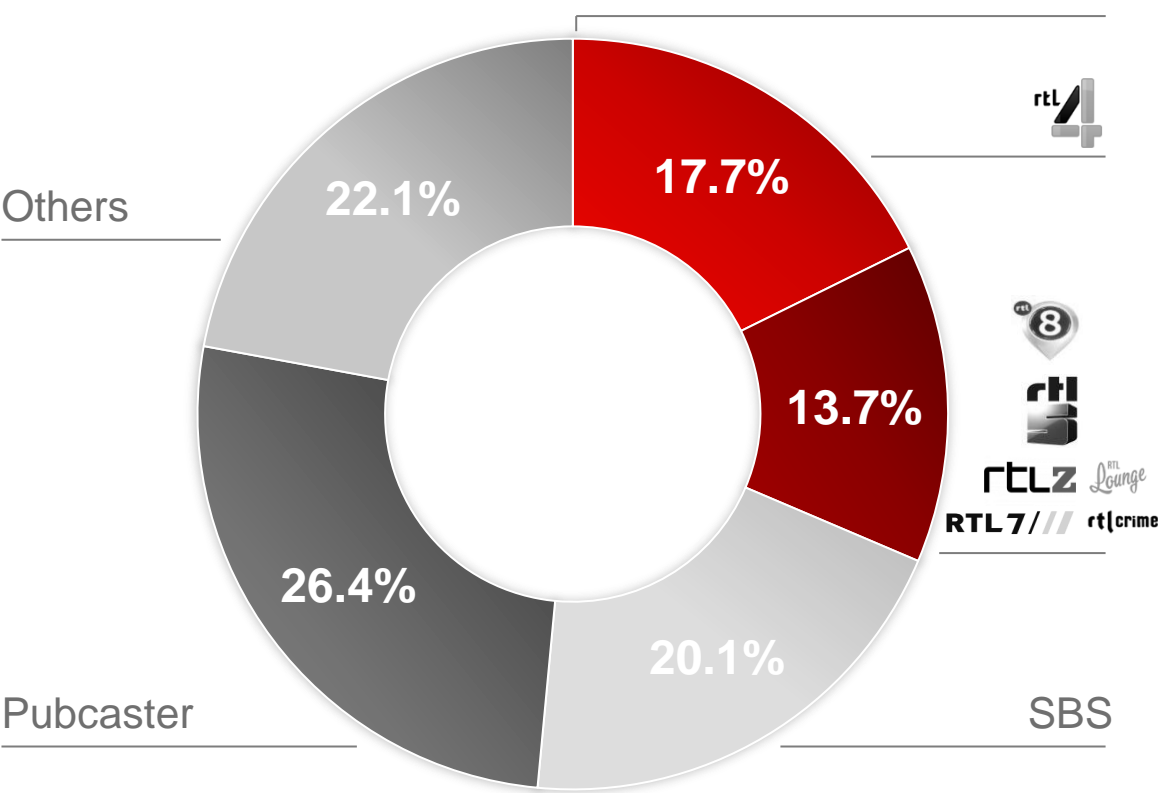
Source: Médiamétrie
Groupe M6: M6, W9 and 6ter; TF1 Group: TF1, TMC, NT1 and HD1

RTL Nederland

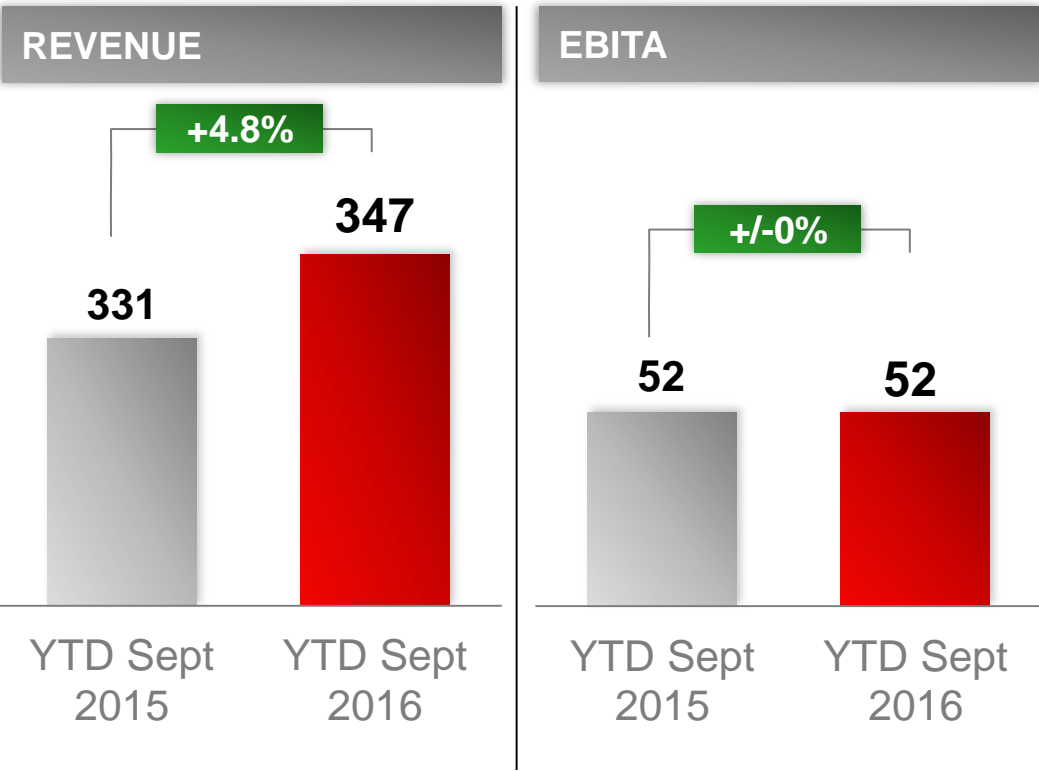
Solid performance in difficult ad market

FAMILY OF CHANNELS

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



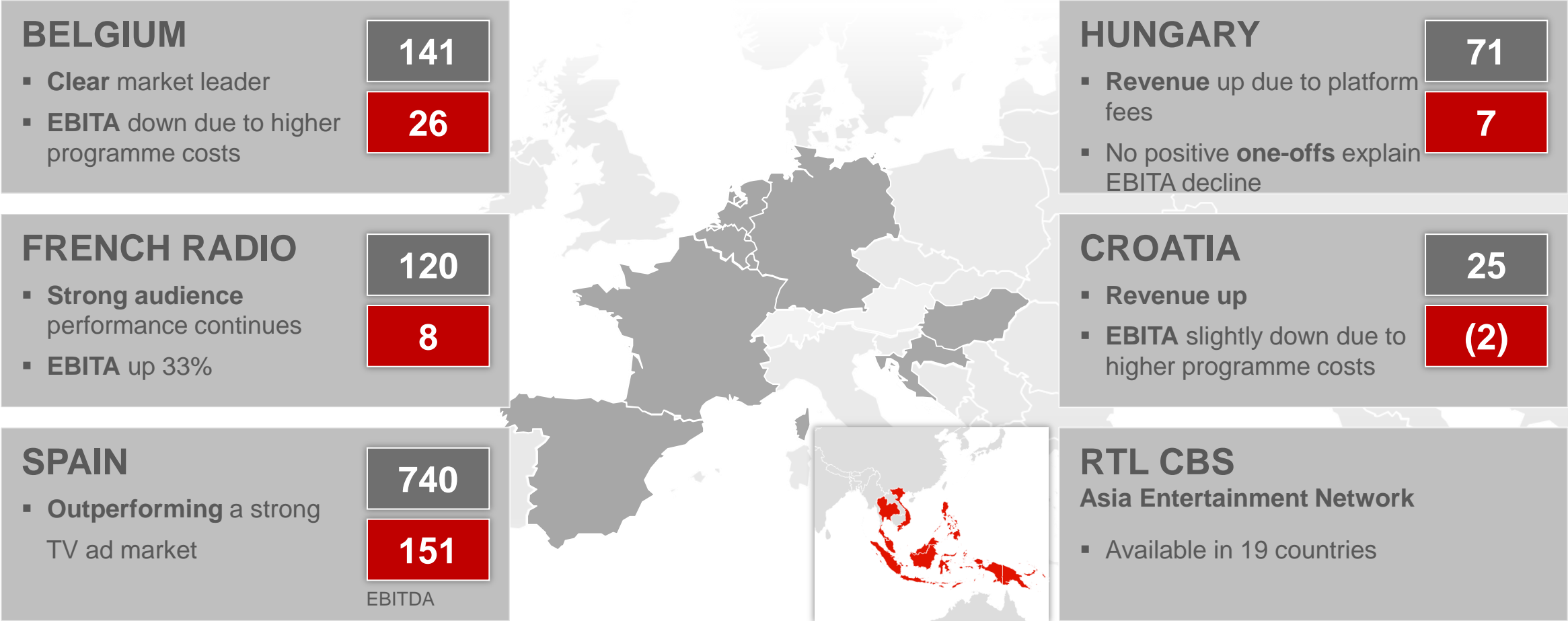
KEY FINANCIALS (in € million)



Source: SKO

Other markets

9 months 2016: other territories report mixed performance



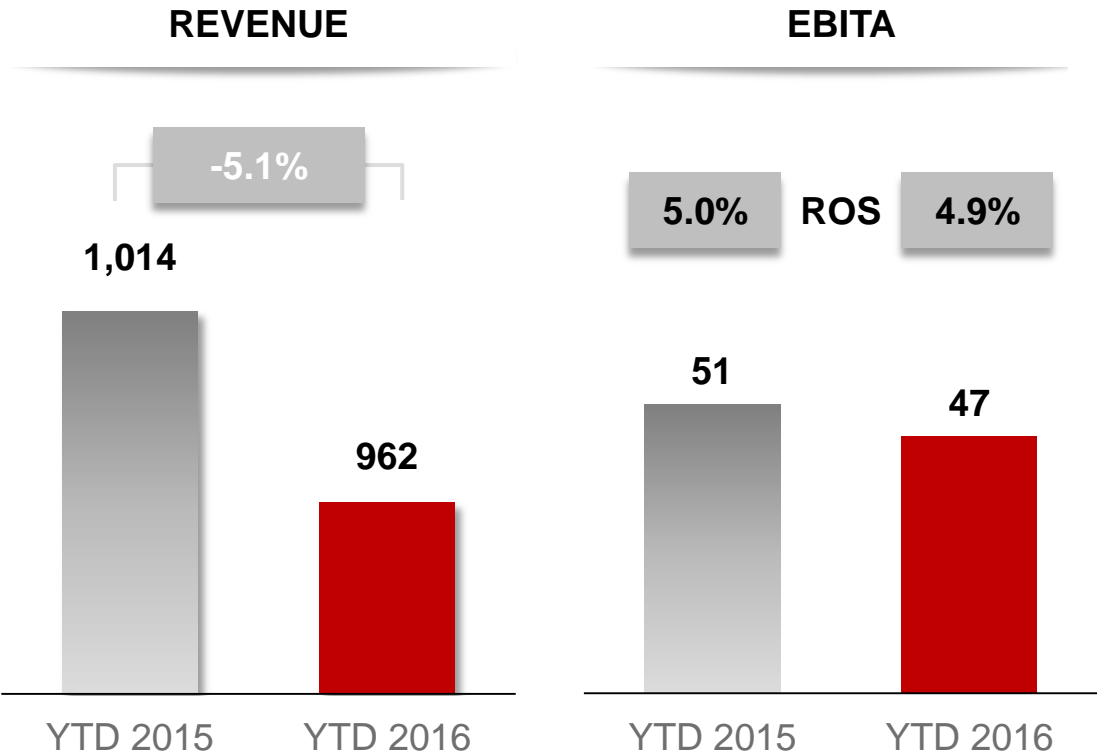
Revenue EBITA, in € million

FremantleMedia

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

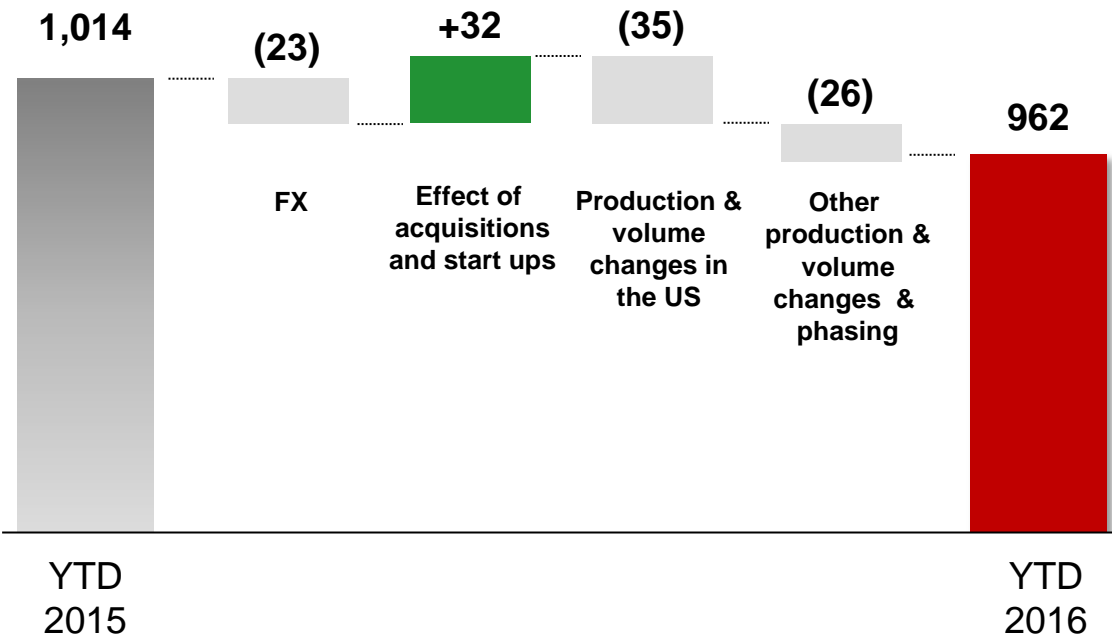
KEY FINANCIALS

(in € million)



REVENUE BRIDGE

YTD 2015 – YTD 2016 (in € million)

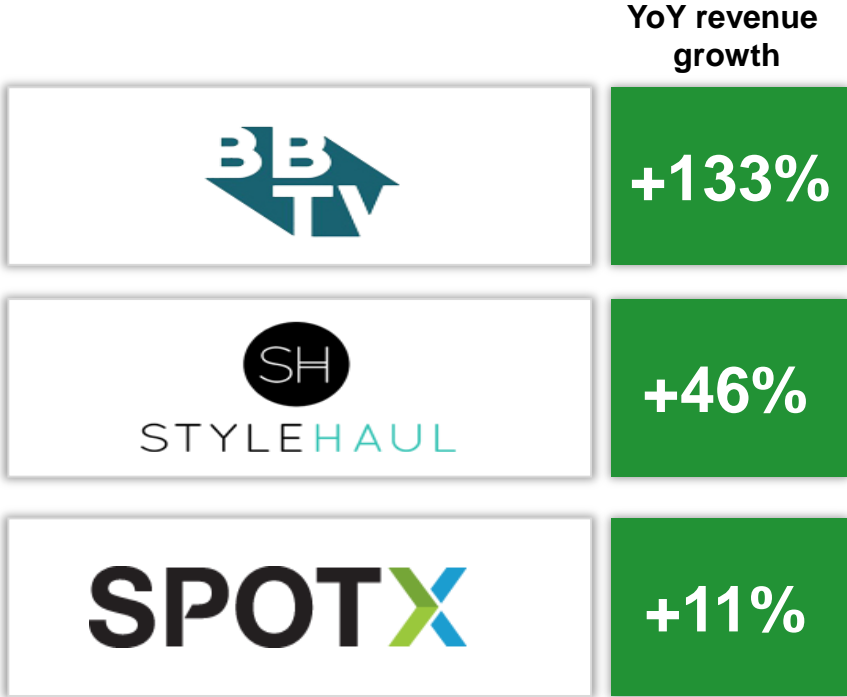
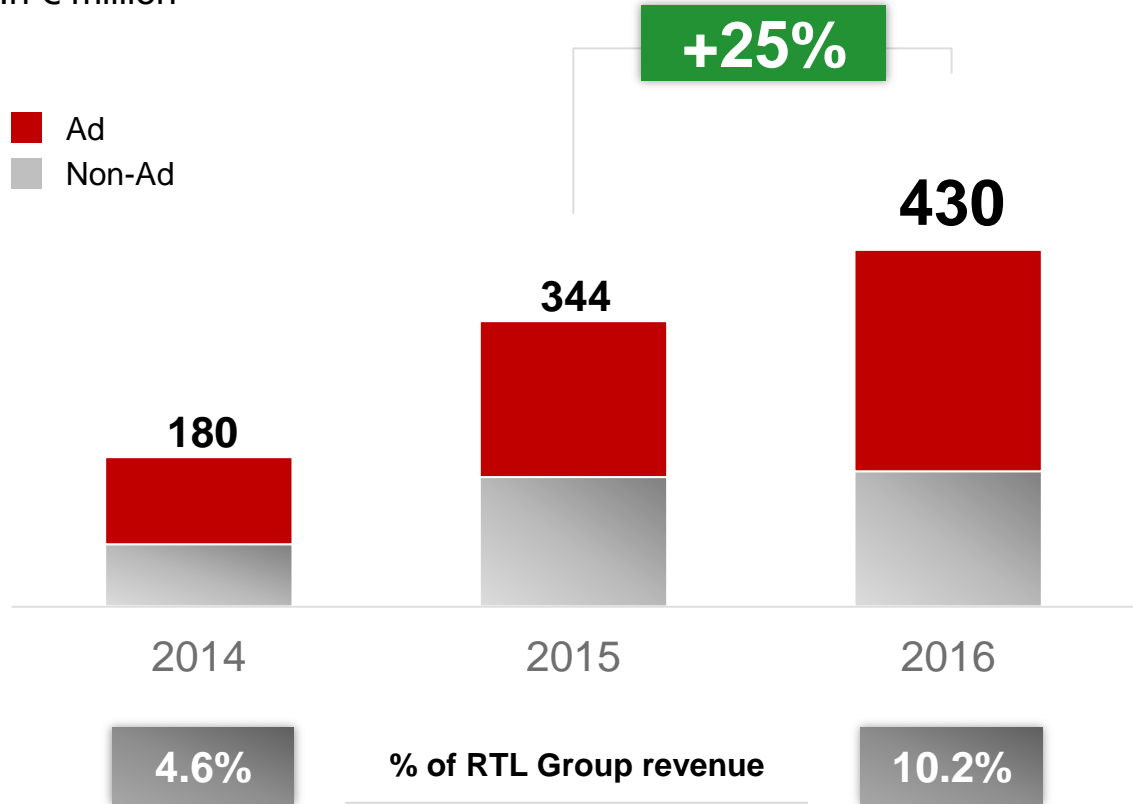


YTD represents 9 months to 30 September

Digital revenue

Continuing to show strong growth

DIGITAL REVENUE, YTD September
In € million



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Outlook 2016

RTL Group

Outlook unchanged for 2016

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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 %

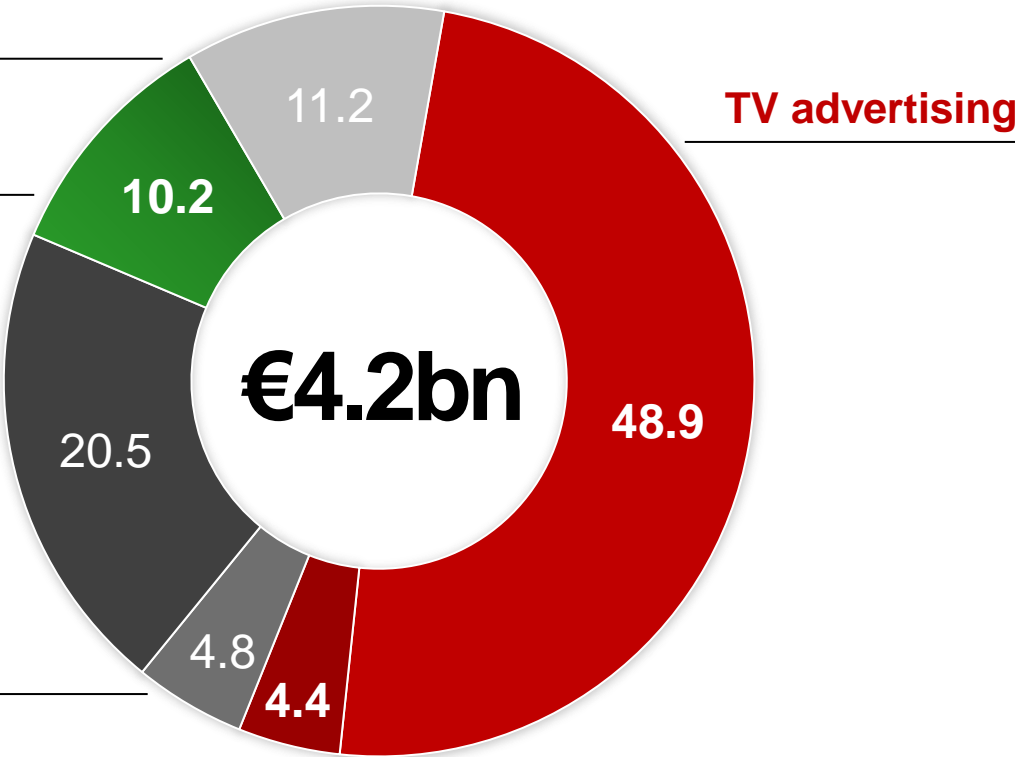
Other diversification

Digital

Content

Platform revenue

Radio advertising



DEPENDENCY FROM TV ADVERTISING

- TV advertising
- Other revenue

