

The next phase

Copenhagen Future TV Conference, May 7

MEDIAVISION 

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Insight



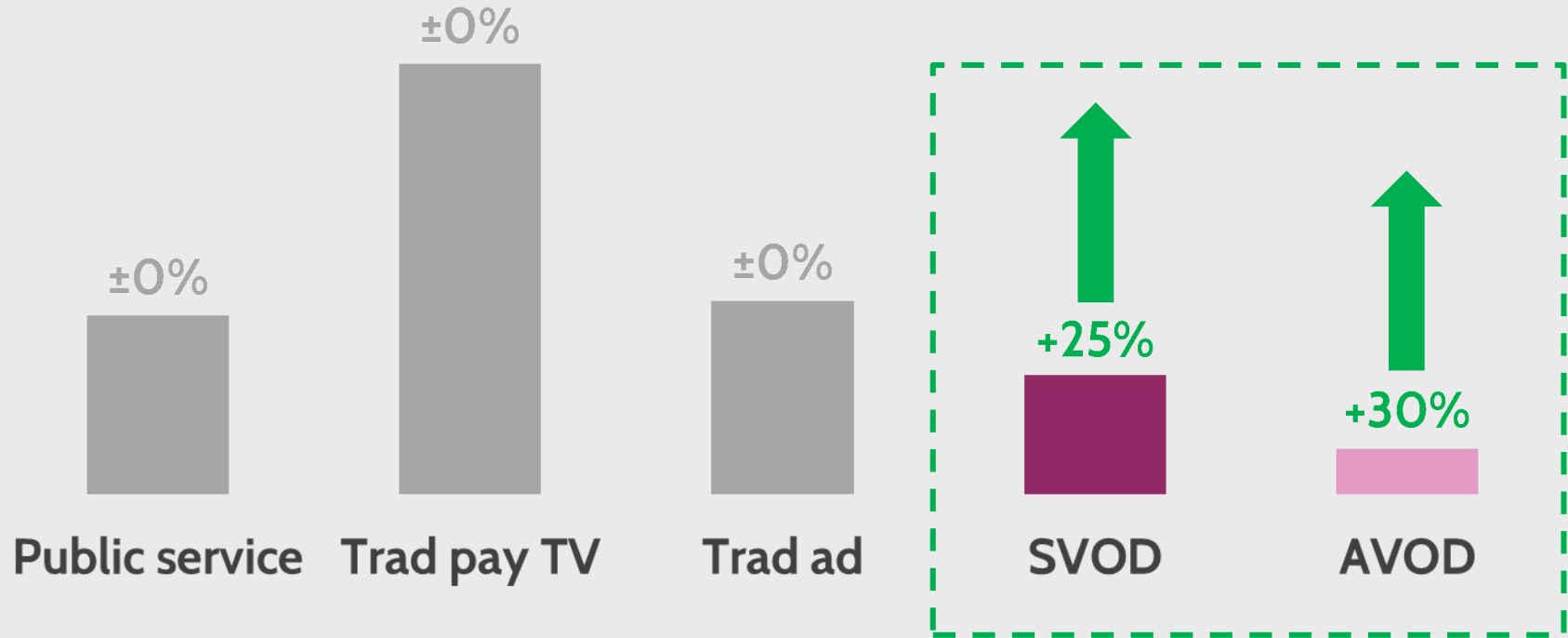
Implication



Strategy

€6.5_{bn}

Scandi TV market revenues 2018



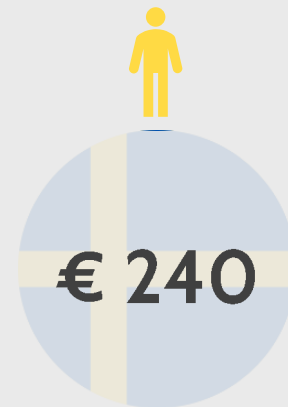
Scandi TV market revenues 2018



€1.9 bn

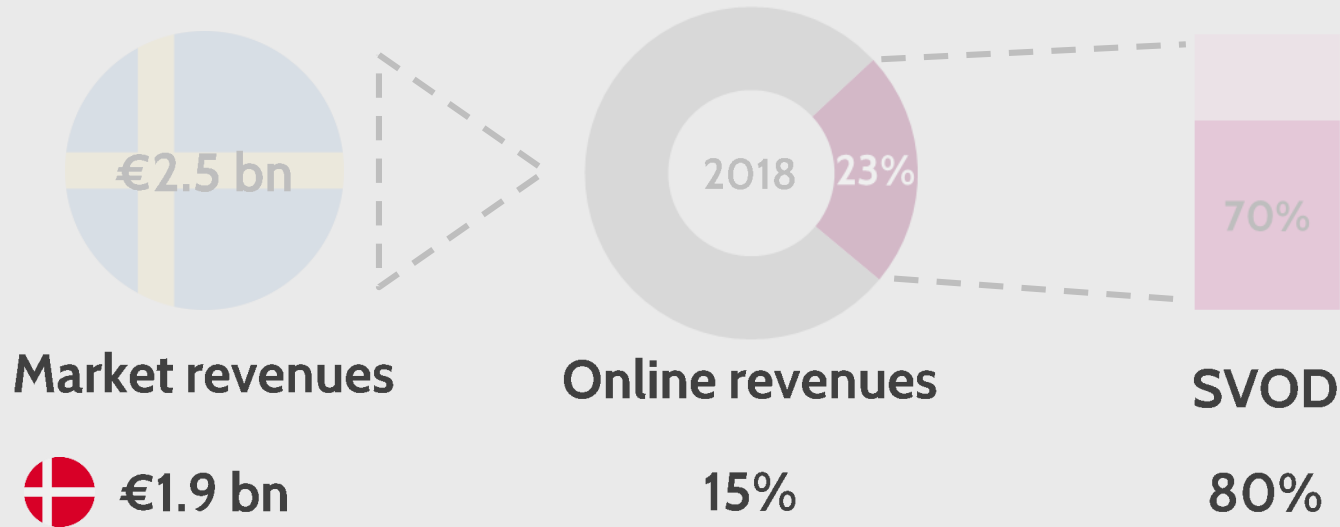


€2.0 bn

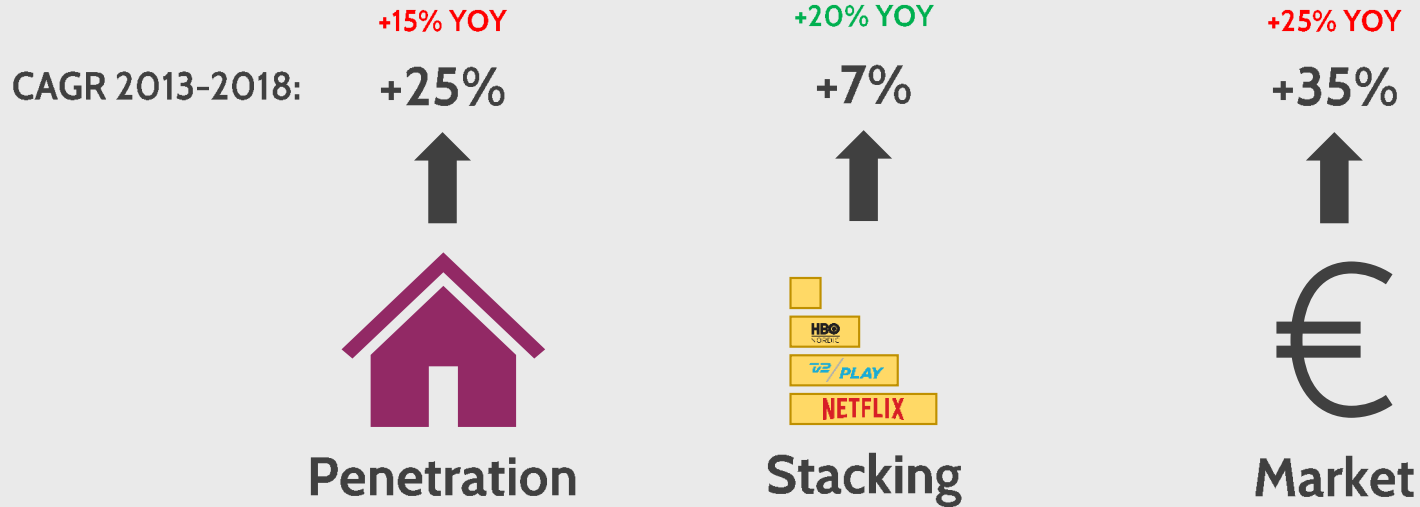


€2.5 bn

Swedish TV market a bit more diversified



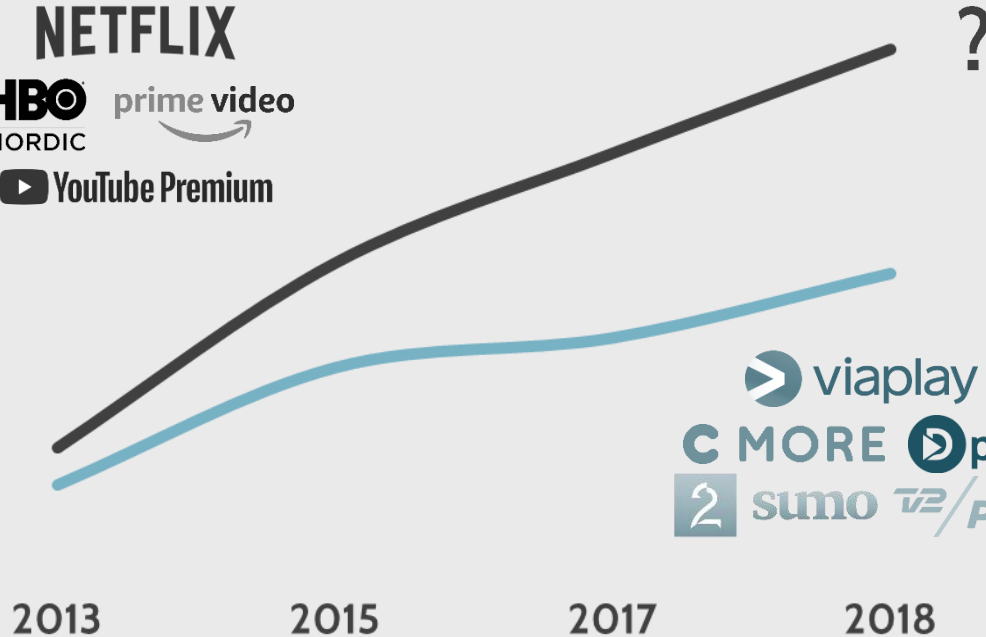
5 year Scandi growth



Market driven by globals



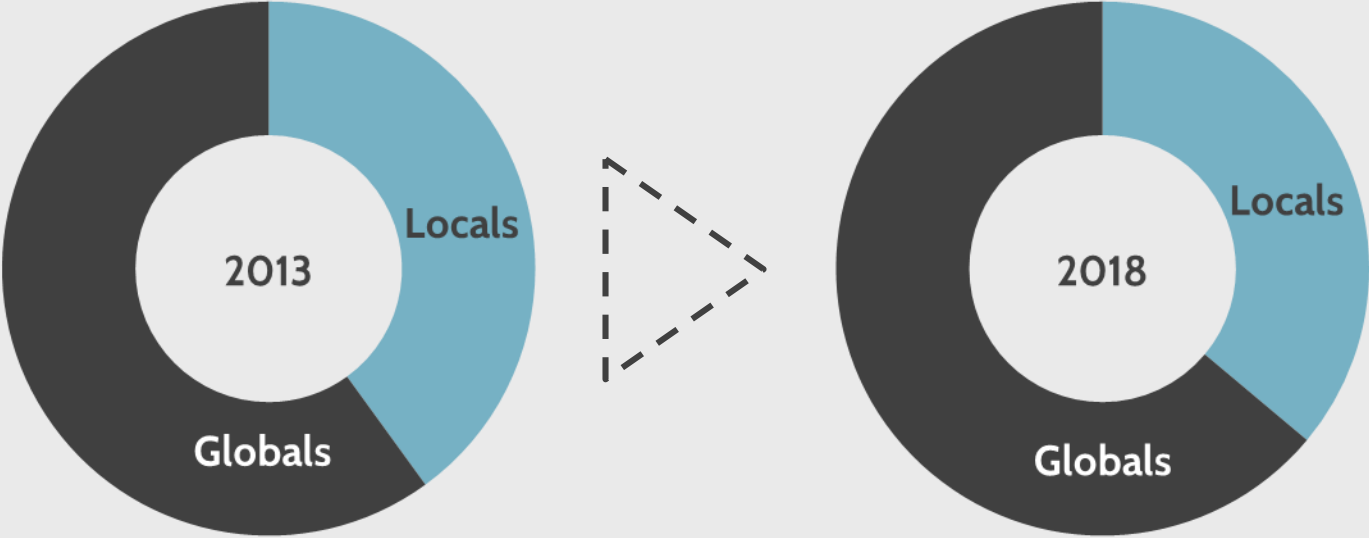
NETFLIX
HBO prime video
NORDIC
YouTube Premium



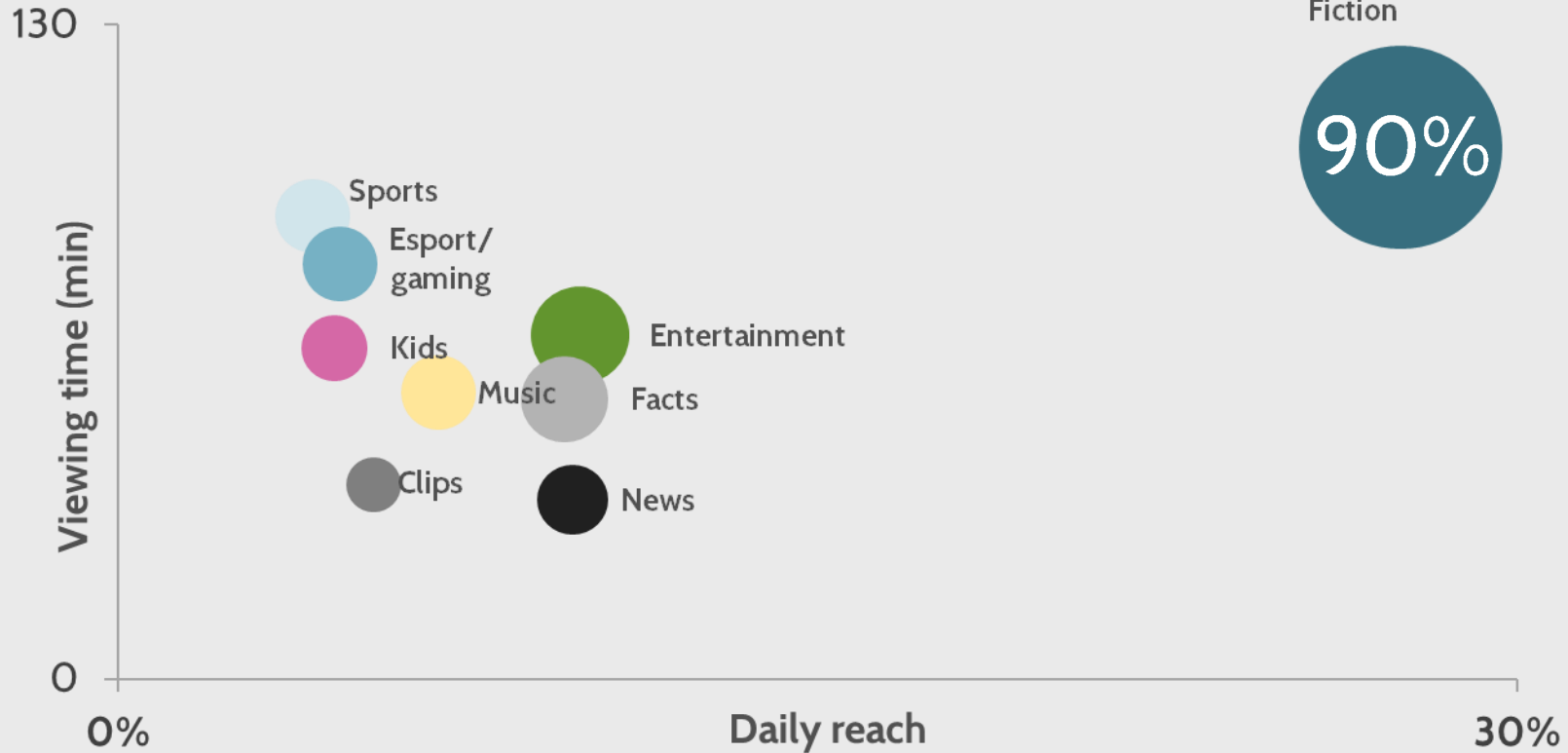
viaplay
C MORE play
2 sumo TV2/PLAY



Globals vs Locals similar to 2013



Content: Foreign





What's

ahead?



SVOD pen towards 60%

- Stacking growth required



Increased competition

- New globals (eg Disney)



BC viewing drop

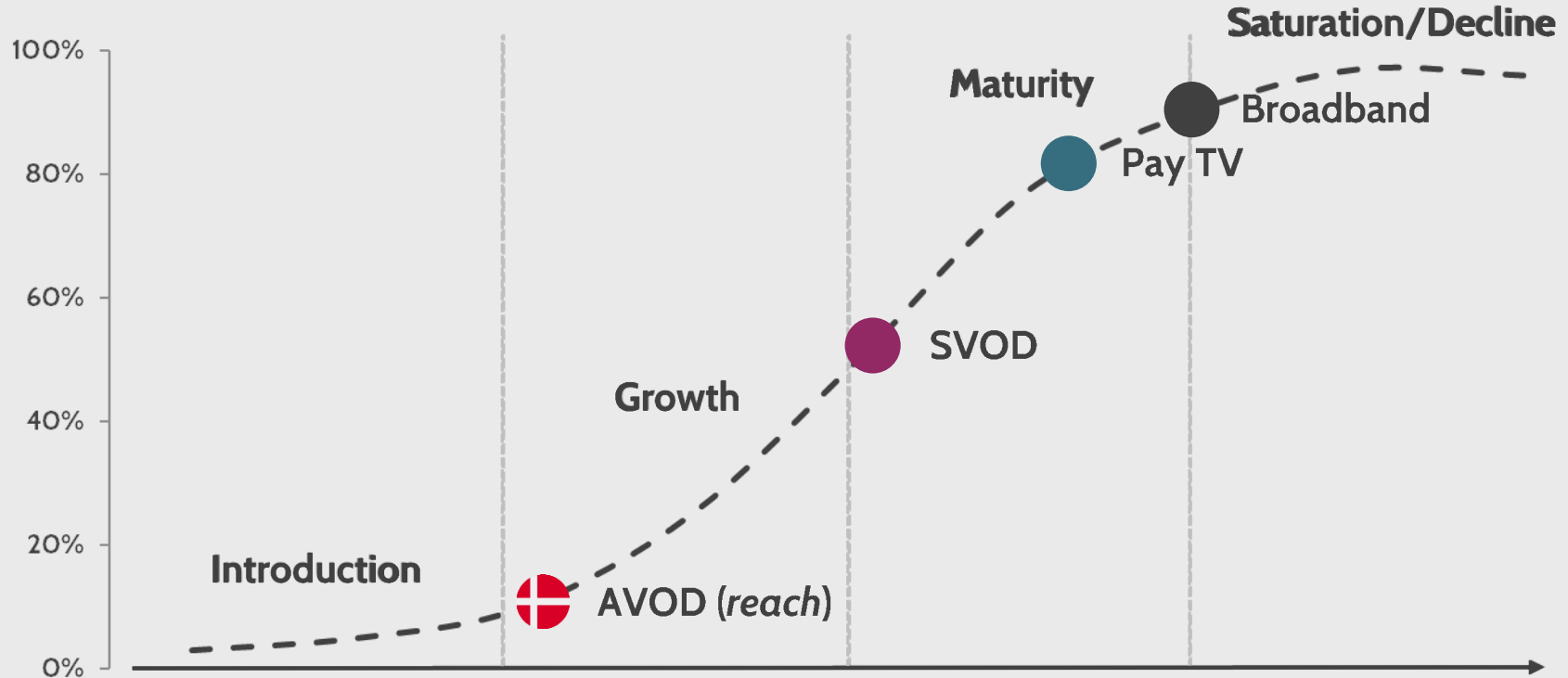
- Approx. -5% annually



Supply > demand

- Sustainability needed

A maturing market



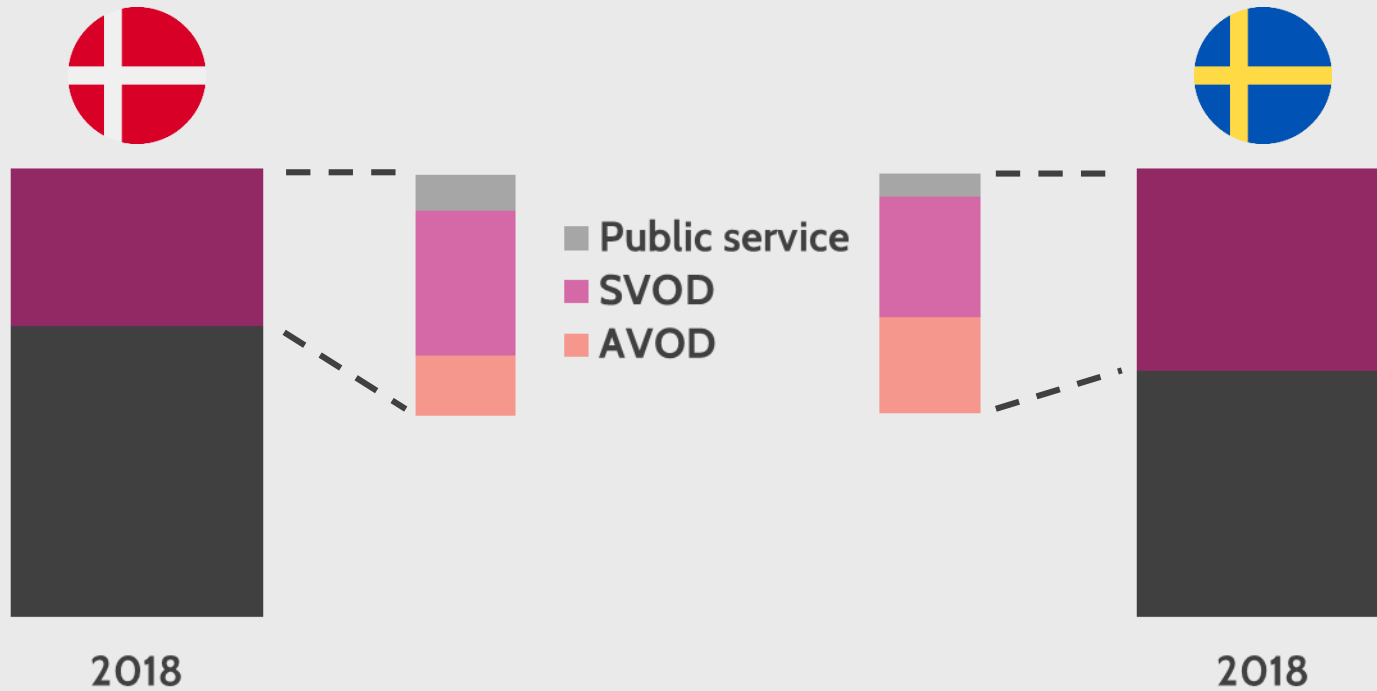
Online viewing



Sweden close to 50/50

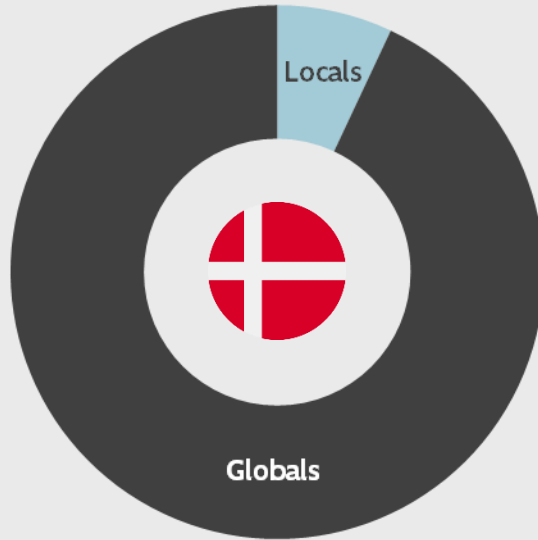


What drives online viewing?

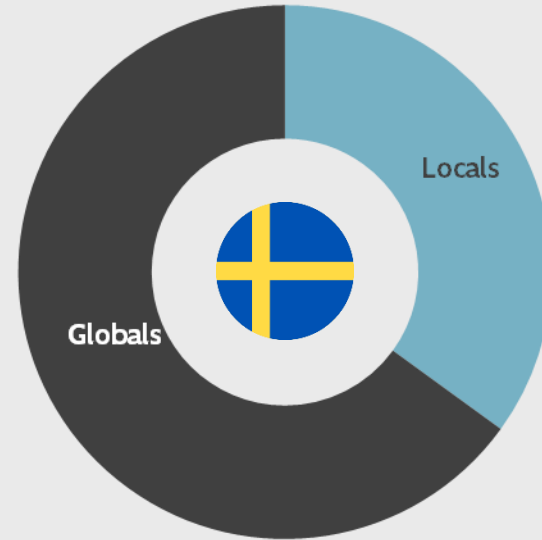


Local AVOD driving Swedish market

Share of viewing

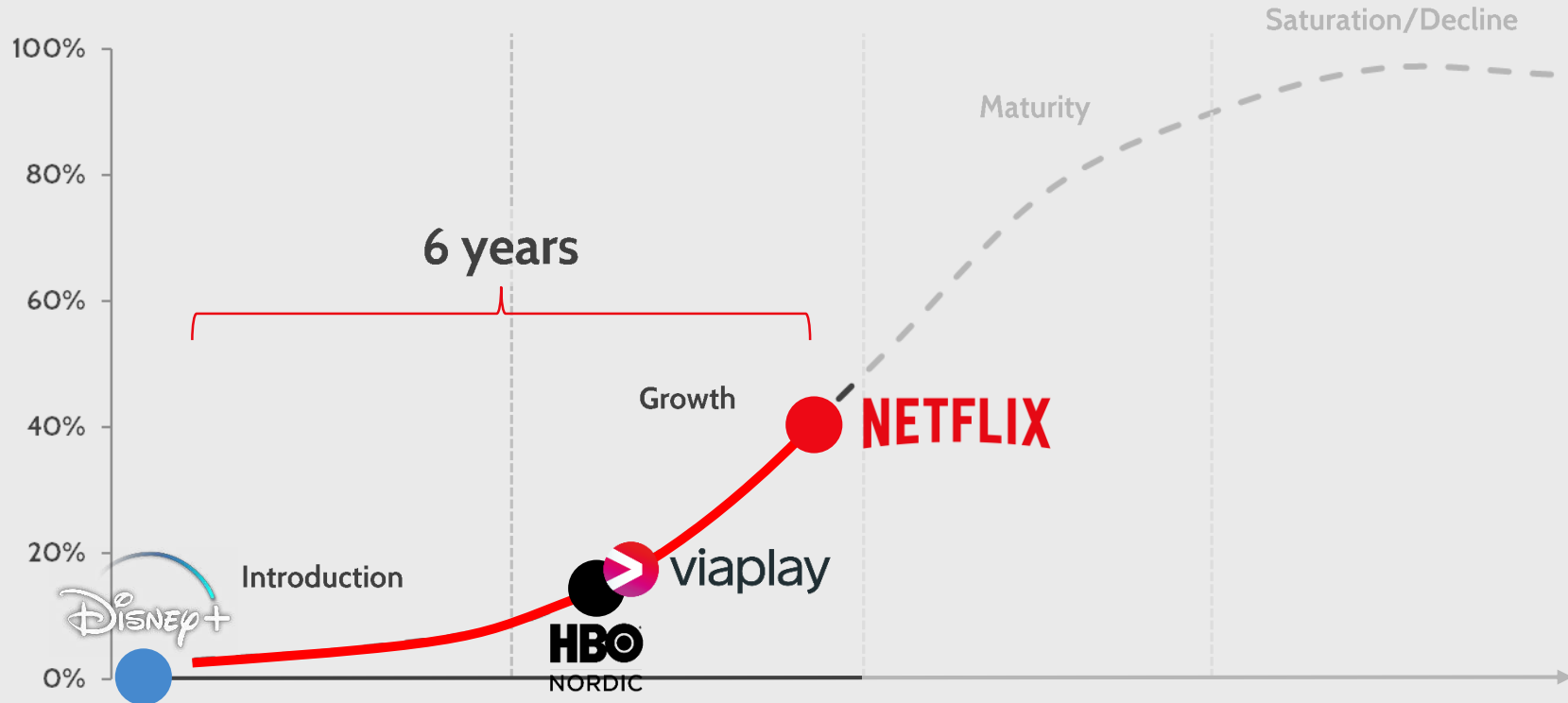


Share of viewing



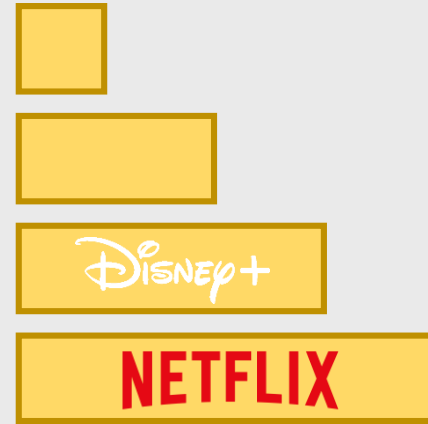
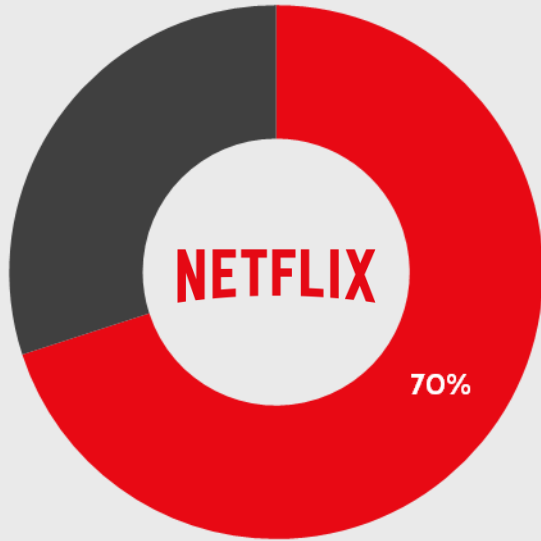
Back to SVOD...

Netflix with headstart



Netflix "base" in majority of SVOD HHs

Stacking: One way to gain foothold



To summarize...



To summarize...



Continued transformation to online



Stacking and penetration



AVOD next

Thanks!

marie.nilsson@mediavision.se

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