

TV IS STILL THE BEST.

Comparison between TV and social media in the advertising market

TV guarantees reach

Reach of cumulative viewers (TV total)



Basis E 14+ (Pot. cut-off date 01.01.2023: 68.43 million); Source: AGF Videoforschung in cooperation with GfK; VIDEOSCOPE 1.4, market standard: TV, 01.01.2023-31.12.2023; data finally weighted | Seven.One Media - Media Insights & Analytics

TV is the most important advertising medium

Relevance of advertising



Basis: E 14+ years (70.08 million) / "Television/websites/social networks is/are useful, stimulating to buy or informative." Source: b4p 2023 | / Seven.One Media - Media Insights & Analytics

TV has the highest chance of perception

Perception opportunity*



*Attention to the screen during advertising, proportionate to the spot length, calculated with coverage
Basis: E 18+
Source: eye square / Screenforce



Advertising works **better** on TV and BVOD than on social platforms.

Source: Media Equivalence Study, Facit



TV is considered a daily **agenda-setter** for other media.

For over **35 YEARS** TV has been the most popular leisure activity in Germany

Source: Foundation for Future Studies Leisure Time Monitor 2021 / Seven.One Media - Media Insights & Analytics

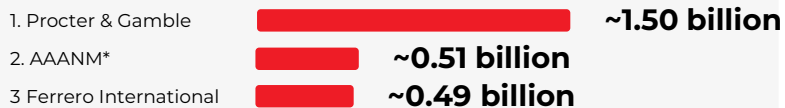
TV consolidates brands in the **long-term memory** of consumers and stimulates short-term sales among people who are currently "in the market".



Source: Research Flash No.58 - It's (not) all about ROI

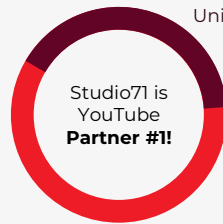
American Tech Giants rely on TV advertising and take 2nd place

Gross investments in TV advertising



Source: Nielsen, Gross advertising spend YTD January-December 2023, adjusted for media groups, omnichannel categories, venture and barter deals, Nucom & self-promotion
* Sum of Amazon, Alphabet, Apple, Netflix, Meta

25 million Unique user



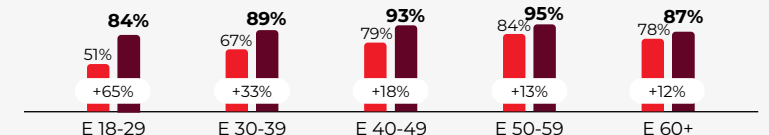
~57 million Total

You reach more than **44 percent** of all YouTube users in our network in Germany.

Source: Comscore 10/2023

TV and digital reach every generation

Incremental cumulative net reach per month | TV TV+Digital



Basis: E 18+ (pot. 67.09 million); Source: AGF Videoforschung; AGF SCOPE 1.4; Market standard: TV, 01.01.2023-31.12.2023; TA 1-30; Seven.One Media Core Audience Run of Network InStream: b4p 2023 |; Comscore 0-monthly UU, 2022/11-2023/10; Reach Moving image: Own Estimate / Media Insights & Analytics

It is true that TV has lost reach and usage time among the **E14-69** target group in recent years,

BUT...

- > **63%** of the entire moving image consumption is **still TV** in Germany.
- > **The daily TV usage**, including media libraries, amounts to **181 minutes**- that is three hours of TV and broadcast video on demand every day.
- > **YouTube videos** have an average daily usage time of **30 minutes** in this target group.



YouTube

30 min

vs.

TV

181 min

TV/BVOD SETS STANDARDS IN SAFETY, DIVERSITY AND IMPACT

CATEGORY

TV/BVOD VIEW

YOUTUBE VIEW

ENVIRONMENT

Brand safety¹⁾

100% Premium,
highest brand safety

Low brand safety,
Risk for brands

TARGET GROUP AND USER BEHAVIOR

Target group reach²⁾

Reaches a broad target group,
including the important light buyers

Limited to younger, less
diverse groups

Usage duration³⁾

Highest usage time of all media: 181
minutes per day
(E 14-69)

Short and fragmented use
Ø 30 minutes per day (E 14-69)

Target group
preferences³⁾

Popular among older target groups,
important groups for brands

Less popular among older target
groups

ADVERTISING IMPACT AND RECALL

Advertising impact
and -recall²⁾

High advertising acceptance and
-impact

Advertising is perceived as an
annoying detour → Significantly
lower perception and impact

Sustainability of the
advertising impact²⁾

Stronger, long-lasting advertising
impact

Superficial and short-term
advertising effect

WHY TV?

- > **Trustworthy quality:**
TV/BVoD stands for controlled and high-quality content that offers a trustworthy platform for brand advertising.
- > **Targeted reach:**
The broad and diverse audience of TV/BVoD makes it possible to reach all age groups.
- > **Favorable environment for advertising processing:**
TV/BVoD advertising benefits from viewers' relaxed lean-back mode and enables harmonious embedding in the viewing experience.
- > **Lasting brand impact:**
Advertising in TV/BVoD environments has a stronger and longer-lasting effect on the brand image.

STUDIO71 SETS NEW STANDARDS IN DIGITAL ADVERTISING QUALITY AND EFFICIENCY

ARGUMENT

EXPLANATION

PREMIUM NETWORK AND QUALITY

All-In-One Solution	Access to all existing and new ProSiebenSat.1 channels and associated creators at any time via Studio71 Reserved (TV content not included in YouTube's Broadcaster and TV Select bundles)
Brand safety	Secure brand environment with constantly checked content (brandsafe, fraud free) on over 300 curated channels
Top content quality	Combination of professionally produced top formats and content from experienced creators, without amateur or music content
Exclusively premium environment	High quality assurance standards through constant monitoring of channels and content
High planning security	Guaranteed delivery with reserved non-skip inventory for reliable advertising presence
Addressing target groups and specialization	Specific, digital-savvy target groups through close collaboration with various content creators (micro & macro influencers) including extensive targeting options

CUSTOMER SERVICE

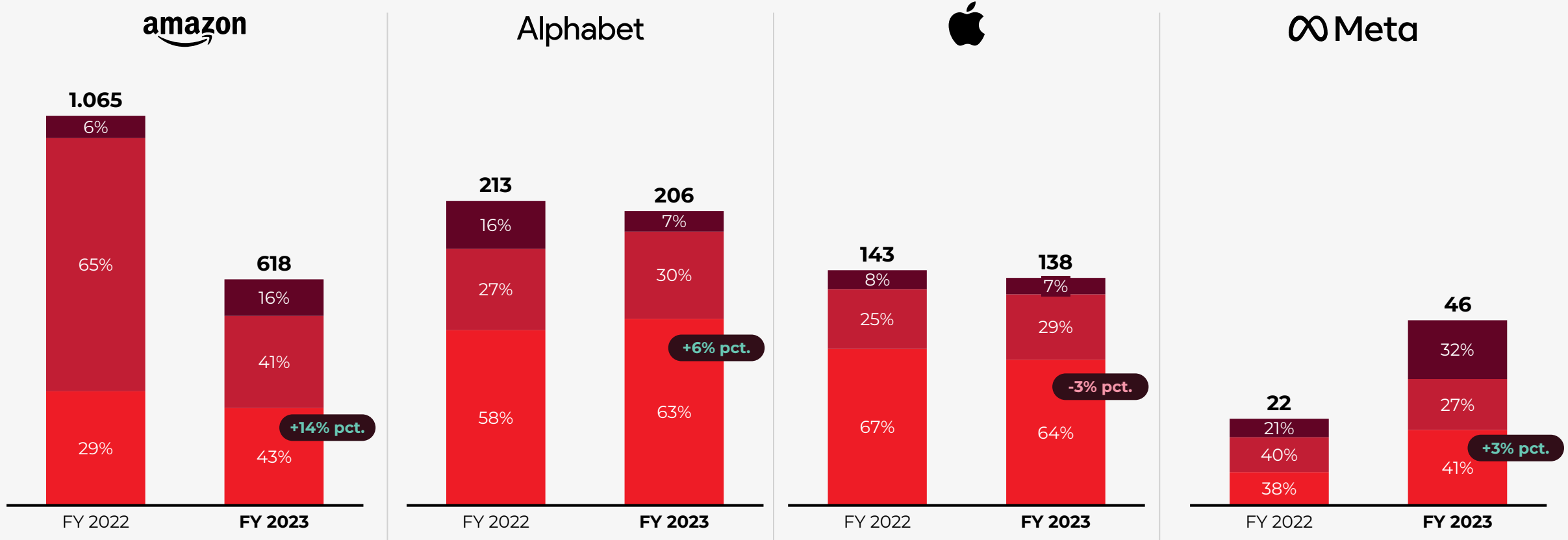
Customized adaptations	Channel selection in line with customer requirements is possible at any time
Managed services	Management and optimization of campaigns according to customer goals, within a budget defined by the customer, by Studio71 experts, via the Studio71 Engage product line
Analysis and tracking	Detailed analysis and tracking options for more efficient advertising strategies with optimized targeting

TV IS ALSO THE BEST ADVERTISING PRODUCT FOR THE GIANTS!

Average 53% TV share of the Giants 2023 |

■ TV ■ Online* ■ Other**

Total in €m, shares in %, change in % pts.





TV is also an **effective and high-performance advertising solution** for German e-commerce companies, as Snocks founder Johannes Kliesch confirmed to Philipp Westermeyer in the OMR podcast.

"FOR US, TV IS THE NEW HOT SHIT. (...)"

"THE BIG e-COMMERCE PLAYERS WERE ALL BUILT VIA TV. (...)"

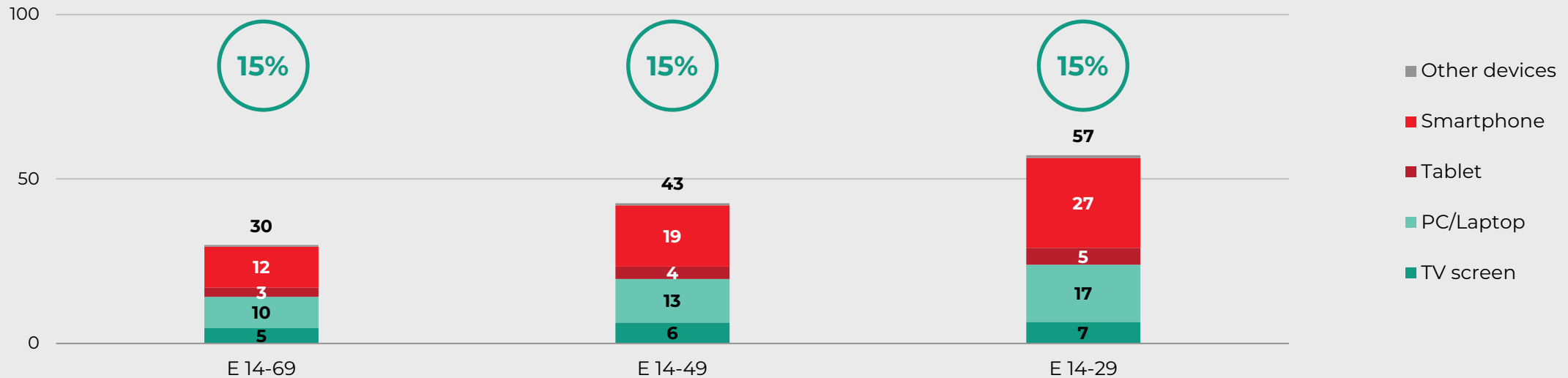
"TV SIMPLY OFFERS US MORE PUBLICITY AND MORE EXPOSURE TO THE MASSES."

YOUTUBE IS USED PARTICULARLY BY THE YOUNG TARGET GROUP AND ON SMARTPHONES AND THEREFORE DOES NOT BENEFIT FROM THE BIG SCREEN ADVANTAGES!

TARGET GROUP COMPARISON

YOUTUBE USAGE BY DEVICE (ROLLING)

Figures in minutes; in circle: TV screen as a percentage of total



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