

PRESS RELEASE

Collaboration between AGF and YouTube provides new evidence of the relevance of video in the German media landscape

Frankfurt/Hamburg, Mar. 6th, 2019 — For the first time, the AGF Videoforschung (AGF) and YouTube published the results of their cooperation. Their collaboration started more than three years ago. The aim of this cooperation is to map the additional use of video through other platforms within the framework of the AGF convergence standard.

The results for the observation period show that — with an average daily viewing time of 267 minutes for persons 18 years and older — the relevance of video in Germany is unbroken! During the study period, traditional linear TV usage averaged 232 minutes per day. Plus 35 minutes of streaming usage, mostly through mobile devices (60%).

"It is a remarkable milestone for AGF's video research to have reached the current level together with YouTube. Everyone involved knows that we need to work continuously on this internationally unique project to best reflect the differentiated use of the platform in this dynamically changing technological environment. AGF's goal is to identify YouTube as a reliable, transparent partner in the AGF system, in line with the common market standard", said AGF Managing Director Kerstin Niederauer-Kopf.

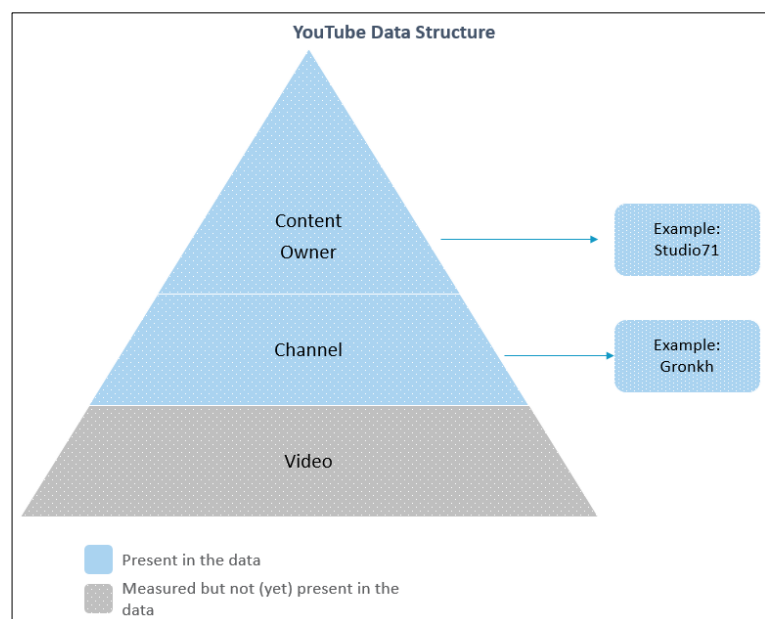
Dirk Bruns, Head of Video Sales, Google Germany: "We are very proud to be able to present the first results together with AGF Videoforschung and hope that industry representatives from other countries will follow the example of AGF. Google has long been committed to transparent measurement. And the presented data highlights the relevance of the YouTube platform for users, the advertising industry, and our content partners."

YouTube as platform in the AGF system

Since April 2015, AGF and YouTube have collaborated intensively with the common goal of integrating the YouTube platform into the AGF system. Perspectively, the media consumption generated via the platform should be made more transparent in order to provide all market partners with a better guidance.

Data and process auditing is performed by independent third parties in order to ensure that data supplied by YouTube complies with AGF's criteria for transparency and quality. This is to ensure that performance metrics for comparable contents on TV and YouTube are calculated and reported according to the same rules. YouTube differs in its content structure from other video content in the AGF system. The data reported for the platform includes all traffic generated in Germany. This includes content that is exclusively distributed on YouTube, such as user-generated content, as well as videos from video providers who distribute their content on their own platforms or third-party platforms in addition to YouTube. The data provided by YouTube comes from both a census and a panel measurement, as is the case for the entire streaming project of the AGF.

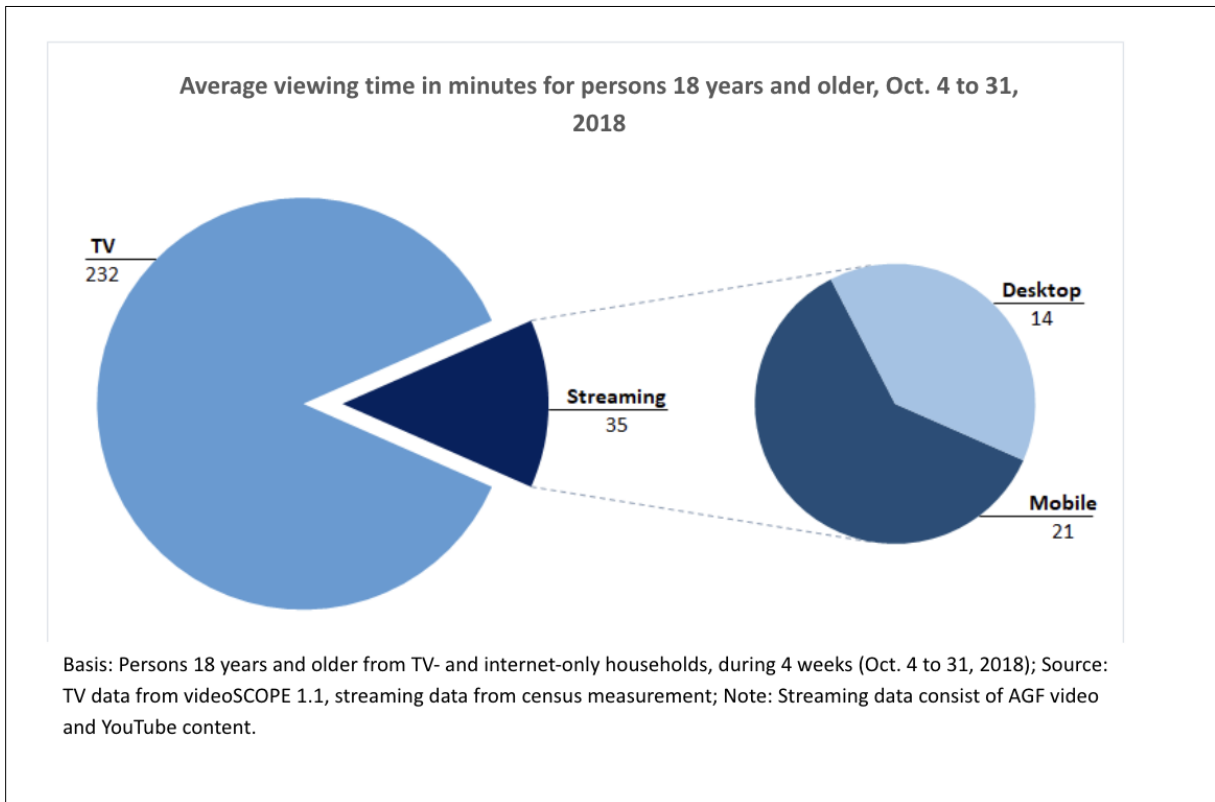
The first results of the collaboration show that the YouTube video platform complements the possibilities for users and for video content providers — from platform-specific content formats for YouTube creators to additional distribution options for TV content. Compared to TV, the distinctiveness of the YouTube platform was particularly evident in the content structure. Rights holders of content posted



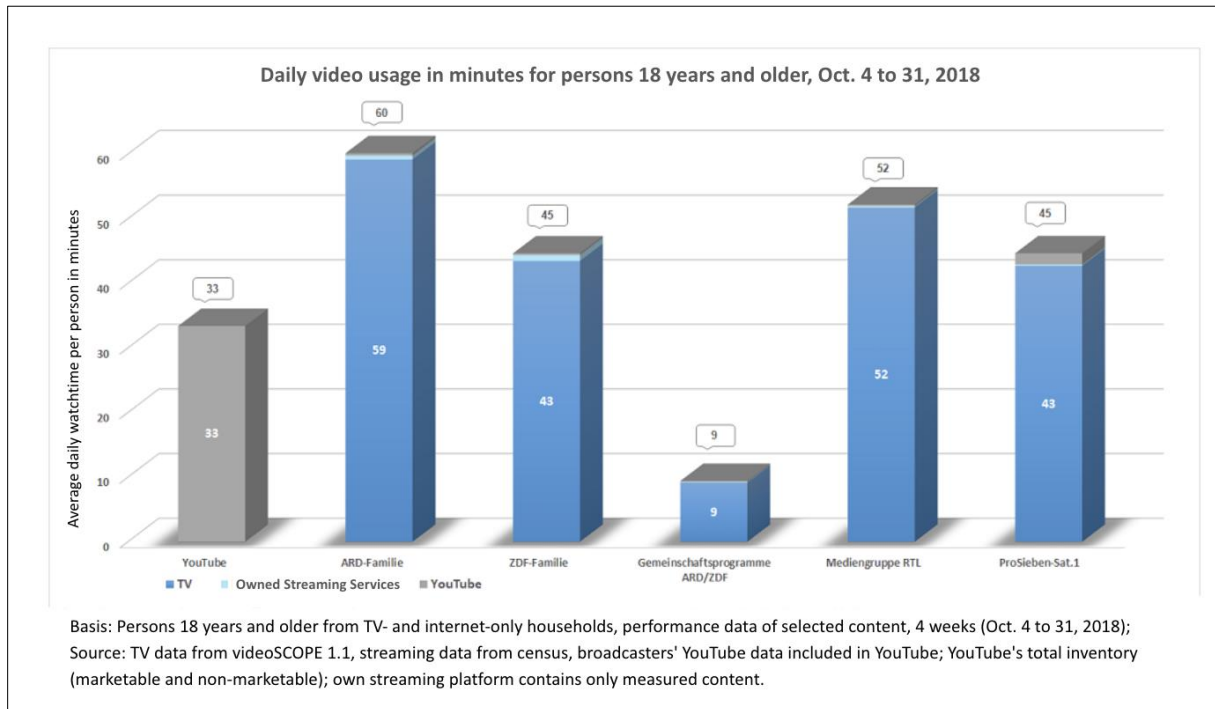
on YouTube — so-called content owners — have no equivalent in traditional TV. Content owners usually consist of different channels which consist of individual videos. This should be taken into account when comparing the performance of video content. Not all content available on YouTube is available for advertising. A distinction of the marketable inventory is not included in the data currently available.

First and further results

In the period from October 4 to 31, 2018, the AGF examined the usage of video (including YouTube) in Germany. For reasons of comparability, people over the age of 18 have been considered, since data for mobile and YouTube usage are only available for these audiences. For the observation period, the average daily viewing time was 232 minutes for TV, 33 minutes for the YouTube platform, and two minutes for other AGF system-enabled video providers. Of the 33 minutes of YouTube usage, three minutes are allocated to content displayed in the AGF system of TV broadcasters and their networks (so-called multi-channel additional distribution channel for traditional TV broadcasters). Around 21 of the total 35 minutes of streaming usage happened on mobile. In addition to the standardised average viewing time, the AGF system can also determine the time spent (basis: users of the respective content).



The content on YouTube is very diverse and small-grained. The data are based on more than 35,000 content owners and over 75,000 channels. The goal of integrating the platform into the AGF system is to enable a far more differentiated consideration of YouTube's content in the future.



Overview: measured TV stations and streaming platforms

ARD channels: ARD Das Erste, ARD-Alpha, BR-Fernsehen, hr-Fernsehen, MDR Fernsehen, NDR Fernsehen, ONE, RBB Fernsehen, SWR/SR Fernsehen, Tagesschau24, WDR Fernsehen; **publisher:** Bayerisches Fernsehen Nord, Bayerisches Fernsehen Süd, BR-Fernsehen, Das Erste, hr-Fernsehen, MDR Fernsehen Sachsen, MDR Fernsehen Sachsen-Anhalt, MDR Fernsehen Thüringen, MDR-Fernsehen, NDR Fernsehen Hamburg, NDR Fernsehen Mecklenburg-Vorpommern, NDR Fernsehen Niedersachsen, NDR Fernsehen Schleswig-Holstein, NDR-Fernsehen, ONE, RBB Fernsehen Berlin, RBB Fernsehen Brandenburg, RBB Online, RBB-Fernsehen, sportschau.de, SWR Fernsehen BW, SWR Fernsehen RP, SWR-Fernsehen, tagesschau.de, Tagesschau24, WDR-Fernsehen; **content owner:** ARD on YouTube, Bayerischer Rundfunk ARD on YouTube, NDR on YouTube, Sportschau on YouTube, Tagesschau on YouTube

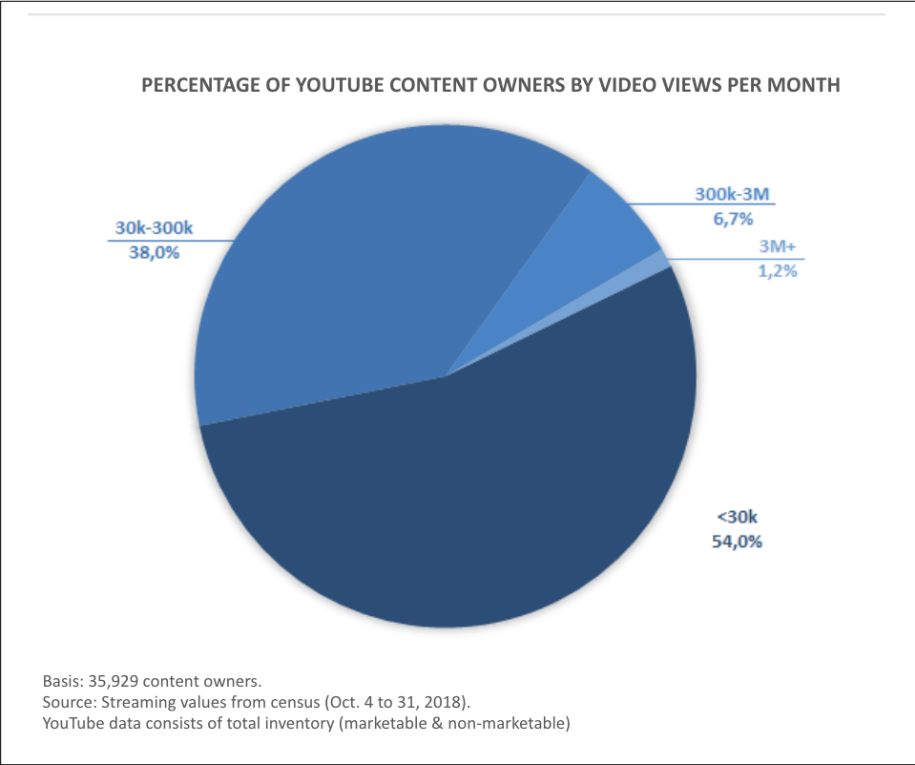
ZDF channels: ZDF, ZDFinfo, ZDFneo; **publisher:** ZDF, ZDFinfo, ZDFneo, ZDFtivi; **content owner:** ZDF on YouTube, ZDFE.unscripted on YouTube, Sportschau on YouTube, Tagesschau on YouTube

Collaborative programming ARD/ZDF, channels: 3sat, arte, ARD/ZDF Kinderkanal, Phoenix (ARD and ZDF fifty-fifty); **Publisher:** 3sat, arte, KiKa, Phoenix (ARD and ZDF fifty-fifty); **content owner:** Funk on YouTube (2/3 ARD, 1/3 ZDF)

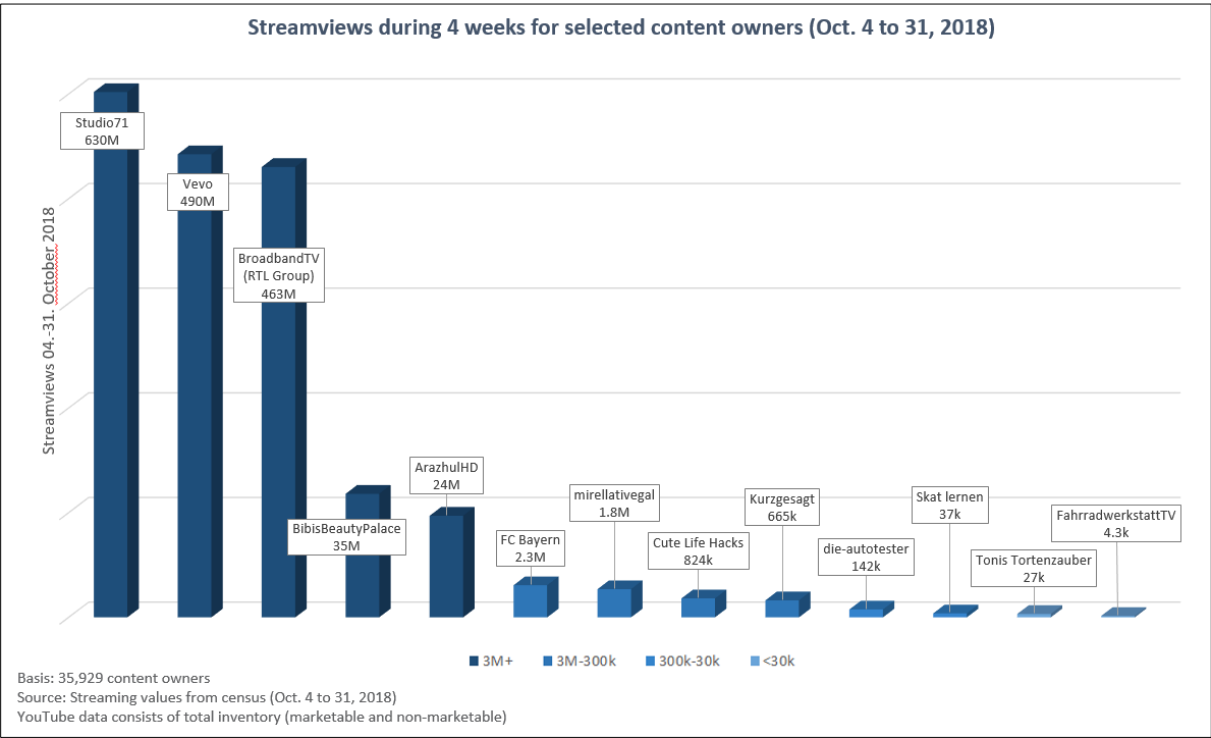
Media group RTL, channels: GEO Television, n-tv, NITRO, RTL, RTL Crime, RTL II, RTL Living, RTL Passion, RTLplus, SUPER RTL, VOX; **publisher:** Frauenzimmer, kochbar, NITRO now, n-tv now, RTL now, rtl.de, RTL2 now, RTLplus now, SuperRTL now, tv now, VIP.DE, Vox now, VOX.de, WATCHBOX, WATCHBOX now, wetter.de; **content owner:** SUPER RTL on YouTube, RTL interactive on YouTube, Mediengruppe RTL Deutschland on YouTube, RTL II on YouTube

ProSiebenSat.1, channels: kabel eins, kabel eins Doku, ProSieben, ProSieben MAXX, Sat. 1, Sat. 1 Gold, sixx; **publisher:** 7TV, Galileo, kabel eins, kabel eins Doku, ProSieben, ProSieben MAXX, ran.de, Sat. 1, Sat. 1 Gold, sixx; **content owner:** Studio71 on YouTube, Studio71_2_7 on YouTube, Studio71 France on YouTube, Studio71 France_A on YouTube

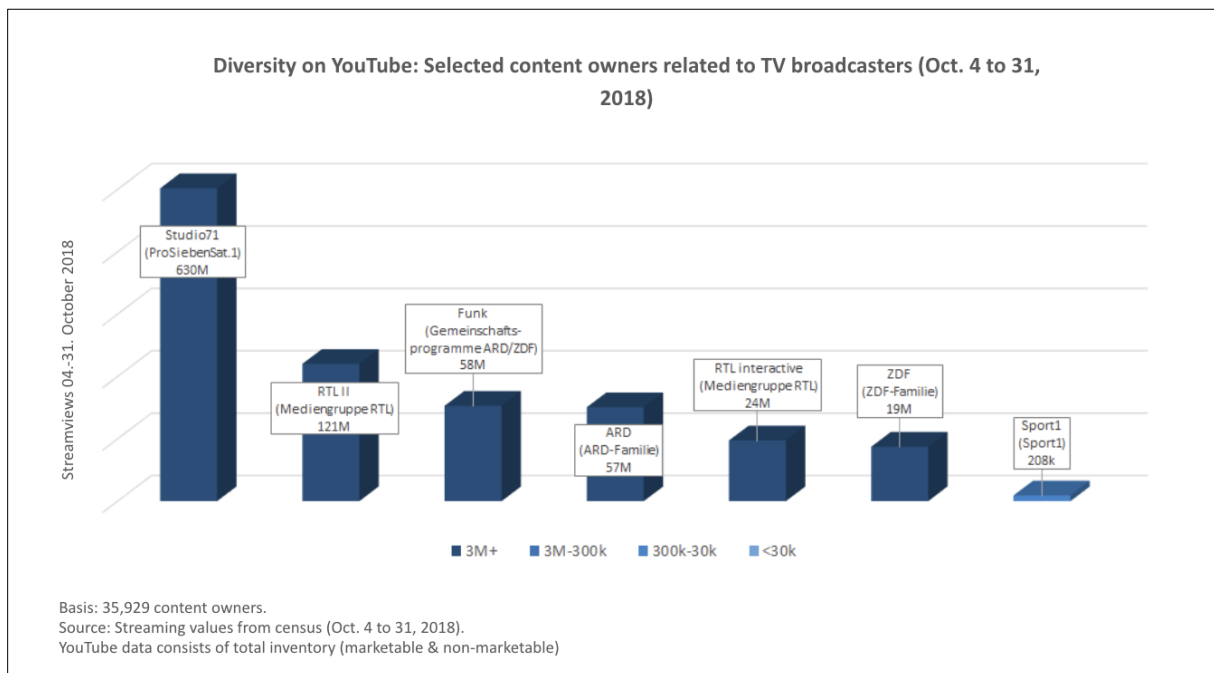
In the observation period, a total of 443 content owners managed to generate more than three million stream views. Of these, 148 achieved over 10 million views per month and 12 even more than 100 million views per month.



High viewing numbers are achieved by, among others, the following content owners:



For the content of TV broadcasters as well as their networks (multi-channel networks), the platform offers an additional distribution channel:



Outlook

After the successful completion of the audits, the collaboration's next focus lies on the initial integration of YouTube into the AGF's standard reporting systems. The initial integration will first show the use of video content; next, the identification of the marketable inventory or bookable units will be the particular focus of the joint project. In addition, it is necessary to finalize the contractual arrangements that are a prerequisite for a regular disclosure of YouTube data in the AGF system. Uniform metrics and the provision of a comparable content display are the first priority of the common methodological developments in order to provide the market with the highest level of transparency.

"The AGF has taken another important step in the expansion of its convergence standard. The depiction of YouTube data is a real milestone", said OMG CEO Klaus-Peter Schulz.

"The next step will be the integration of YouTube in order to achieve the highest possible comparability and transparency for all video content displayed in the AGF system."

About AGF Videoforschung GmbH (www.agf.de)

AGF Videoforschung is the industry body of the broadcasters ARD, Discovery, Mediengruppe RTL Deutschland, ProSiebenSat.1 Media, Sky Germany, Tele 5, WeltN24, Viacom, and ZDF to jointly implement and develop the continuous quantitative monitoring of video content use in Germany including the collection and evaluation of the data. AGF continuously develops its multi-digit, multi-million dollar toolkit to provide the market with reliable data about the use of video content on a daily basis. In addition to the shareholders, licensees, advertisers, and media agencies actively participate in the data collection design and the research design.

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