

we all are
joyn



OVERVIEW

joyn

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01

THIS IS JOYN

Third monthly record in a row: the super streamer celebrates its best month ever in March. With around 9.8 million viewers (Z3+), Joyn achieved the highest reach in its history in March. The super streamer reaches more people every month and they generate significantly more video views. Audience loyalty to Joyn is also increasing noticeably. Users are accessing more and more videos and using the streamer more intensively.

REASONS WHY JOYN IS POPULAR WITH USERS:

- **Super streamer:** Not only is Joyn the largest free aggregator platform for live and on-demand TV in Germany, we are the top choice for anyone wanting entertainment at its best! Over 100 channels and four years of programming on demand – all in one place and free of charge!
- **Variety and exciting content discovery:** Joyn offers a wide range of entertainment for any user situation free of charge, optimized by intelligent recommendations and categories such as 'New & Popular' and 'For You'.
- **Collaborations that count:** All your favorite content in one place, for free! That's why we forge strategic partnerships in the content and distribution sector to offer the best experience. Most recently with an extensive partnership with ARD Plus and ZDF Studios.

REASONS WHY JOYN IS THE BEST PARTNER FOR ADVERTISERS:

- **AVOD:** Joyn connects people and brands as the largest free AVOD aggregator in Germany and sets itself apart from the competition with an innovative, ad-financed model based on the power of advertising. With 7.1 billion marketable AIs, we have more than Netflix, RTL+ or Disney+! We are also on a promising course in a direct inventory comparison with our strongest competitor, Prime Video.
- **The largest advertising inventory:** Advertising that works! Joyn offers advertisers the largest bookable inventory – where brands meet an enthusiastic and broad audience that enjoys free viewing with no subscription barriers!
- **All-in-one advertising solutions:** From reach and targeting to the creative showcasing of brands, Joyn is a one-stop shop for advertisers. Simply a smarter way to advertise!

5 FACTS

THAT MAKE JOYN SPECIAL

BENEFITS FOR USERS

CONTENT



As an aggregator, Joyn offers an **extensive content portfolio** and caters to the needs of every user.

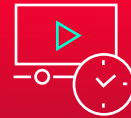
PLATFORM



We offer maximum variety in a way that is **intuitive and easily accessible** so that users can get streaming exactly the way they want.

BENEFITS FOR ADVERTISERS

AVOD



As the only German streamer, Joyn focuses consistently on AVoD, making it the **perfect partner for advertisers.**

PREMIUM



Joyn provides the **greatest possible premium video reach** for advertisers.

SUCCESS



Joyn offers maximum campaign success through **unique targeting models, precise advertising control & one-off special ads.**

JOYN IS THE
HEART OF OUR
ENTERTAINMENT
BUSINESS.



>100
channels

~50K
hours of
programming

JOYN – ONE PLATFORM FOR EVERYONE



VIEWERS

Third record month in succession

9.8 MILLION*



ADVERTISERS

Largest streaming inventory

10.5 BILLION**

CONTENT

Comedy, Reality,
Fiction & Show

Live & On Demand

02

SUCCESS METRICS

We are **CONSTANTLY GROWING** ON THESE LEVELS



INVENTORY

+38% MAIs vs. PY



REACH

+78%
vs. April 2024



WATCH TIME

+67%
vs. previous year

GROWING USER NUMBERS

JOYN IS EXPANDING ITS VIDEO USERS.

+22%

monthly video users
Q1 25 vs. Q1 24*

+19,2%

monthly video users
from record February to record March



TARGET GROUP RELEVANT TO ADVERTISING

JOYN OFFERS AN ATTRACTIVE USER BASE.

71%

E 25-49

>47%

NHI > €4,000

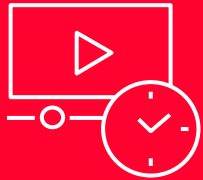
63%

Big screen share



**OUR ADS ARE WATCHED AND
ACHIEVE UNBEATABLE QUALITY KPIS!**

VIEW-THROUGH RATE



97% Pre-roll
99% Mid-roll

MOAT
Benchmark 70%

VIEWABILITY



95% Pre-roll
95% Mid-roll

64%

AUDIBILITY



93% Pre-roll
98% Mid-roll

34%

03

STRATEGY FOR GROWTH

ACQUISITION & RETENTION OF UNIQUE USERS

CONSUMER MARKETING

01

INCREASED CONTENT- RELATED ADVERTISING PRESSURE

Consistent co-branding across all channels

02

DEVELOPMENT OF CLEAR GENRE COMPETENCIES

Broader and deeper entertainment portfolio in the top genres of comedy, reality & show

03

ONGOING BRAND CAMPAIGNS

3 campaigns highlighting Joyn's free offering and unique diversity

04

ACTIVATING OUR FACES

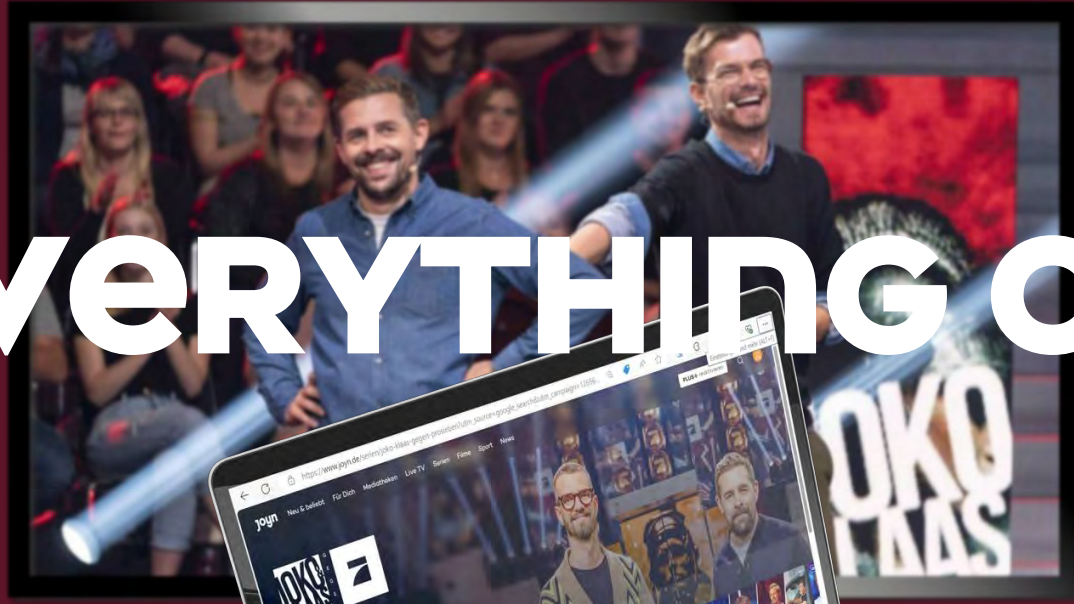
Likable faces convey strong Joyn brand messages in 4 flights

05

SOCIAL & DIGITAL

Strategic expansion of joyn.de through creator cross-promo

EVERYTHING ON JOYN



04

CONTENT

PREMIUM BROADCASTER CONTENT ON ALL DEVICES



COMPREHENSIVE CHANNEL DIVERSITY AND BROAD DISTRIBUTION

JOYN COMBINES LINEAR TV AND STREAMING IN OVER 100 CHANNELS

Originals + Creator Content



Live TV



Media libraries



Fast Channel Brands



REACH EVERY TARGET GROUP WITH JOYN



- > Face-driven content (VoD & live)
- > Children's media libraries & FAST** aggregation

- > Local content (reality & comedy)
- > Licensed content – films & series
- > Wide range of content (live & VoD)

- > Local & licensed content
- > Live TV
- > FAST** (e.g. sports)
- > Media libraries

JOYN ORIGINALS SUPPLEMENT CHANNEL FORMATS

EXPANSION OF JOYN ORIGINALS



2024: Development of COMEDY & REALITY genres

2025: Extension of ADVENTURE & FOOD genres



FACE-DRIVEN CONTENT

Support for relevant creators to develop new Joyn faces



TV EXTENSIONS

Additional current TV formats & innovative enhancements

GAIN INCREMENTAL VIEWERS WITH JOYN

joyn

INCREMENTAL REACH OF SELECTED FORMATS



**GERMANY'S NEXT
TOPMODEL –
BY HEIDI KLUM**

+22.0%

incremental viewers (E 14-19 years)

+7.7% 2023



THE VOICE KIDS

+7.8%

incremental viewers (E 20-29 years)

+7.8% 2023



**WER STIEHLT MIR
DIE SHOW?**

+20.4%

incremental viewers (E 14-19 years)

+10.2% 2023



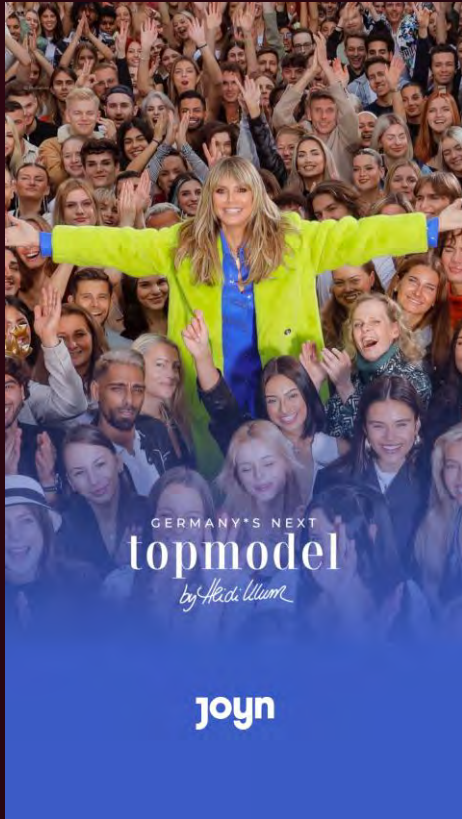
**LANDARZTPRAXIS
2. STAFFEL**

+21.1%

incremental viewers (E 14-19 years)

+17.7% 2023

TOP 2024 VOD FORMATS IN TERMS OF VIDEO USERS



1

2.7 Mio. VU



2

1.5 Mio. VU



3

1.1 Mio. VU



4

1.1 Mio. VU



5

1.1 Mio. VU

UNIQUE IN **GERMANY**: THE JOYN CREATOR STRATEGY

Development of new Joyn faces



Joyn offers creators an additional platform for creative freedom and extra reach.

User acquisition



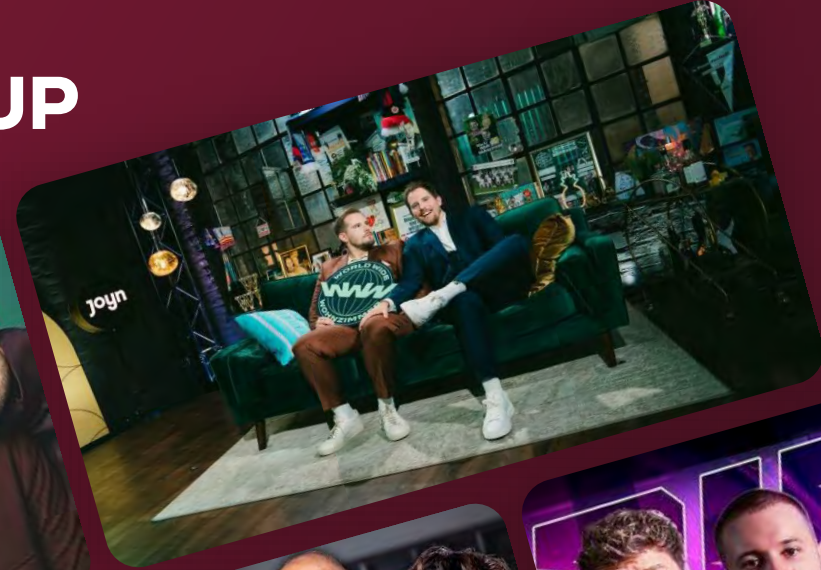
Cross-promotion on the various creator channels attracts younger target groups in particular to the platform.

User retention & maximization of usage



Inspire newly acquired users with live, VOD and licensed content to suit their respective genre preferences and usage situations.

JOYN CREATES **Relevance** IN YOUR YOUNG TARGET GROUP



SUCCESSFUL FORMATS IN THE GENRE: ADVENTURE & FOOD

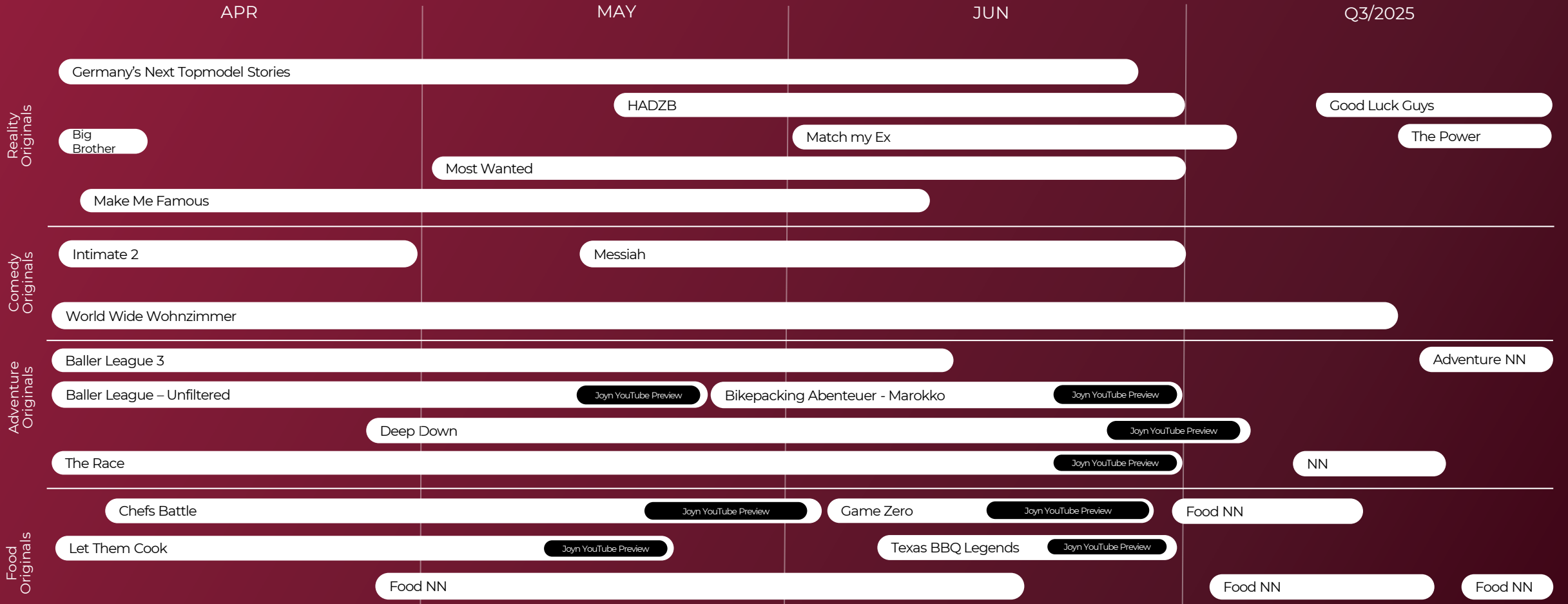


Season 1 has attracted 50 percent new users



Most successful Food Creator format in 2024

JOYN CONTENT ROADMAP 2025



05

AD PRODUCTS

CONVENTIONAL ADS WITH JOYN

		Pre-rolls	Bumper	Pre-split/ first mid-roll	Mid-rolls	Cut-in
VOD	TV: Previews, catch-up & media libraries 	✓	✓	✓	✓	✓*
	Joyn Originals & YouTube previews 	✓	✓	✓	✓	✓*
	External media libraries 	✓	✓	✓	✓	✓*
	External media libraries Sports 	✓	✓	✓	✓	✓*
LIVE	Private channels 	✗	✓	✓	✓	✗
	Public channels 	✗	✗	✗	✗	✗
	Sports channels 	✗	✓	✓	✓	✗
	FAST channels 	✗	✓	✓	✓	✗
	On-demand channels 	✗	✗	✓	✗	✗

* Not bookable as Joyn only or format only

01

CO-SPONSORSHIPS

Program sponsorship

Trailer sponsorship

Onset sponsorship

Title sponsorship

02

BRAND INTEGRATION

Product placement

Virtual placement

03

SPECIALS

Licensing

Testimonial

04

SPECIAL ADS

Pre-split

Studio split

Joyn tip

Premium partnership

Advertorial

Branded cooperation

Branded format onboarding

Branded live stream

Branded format 360 degrees

Interactive ad

Native ad

Digital special

Co-branded TV spot

Streaming tip

App

Joyn.de

Joyn.de

TV

Samsung TV

06

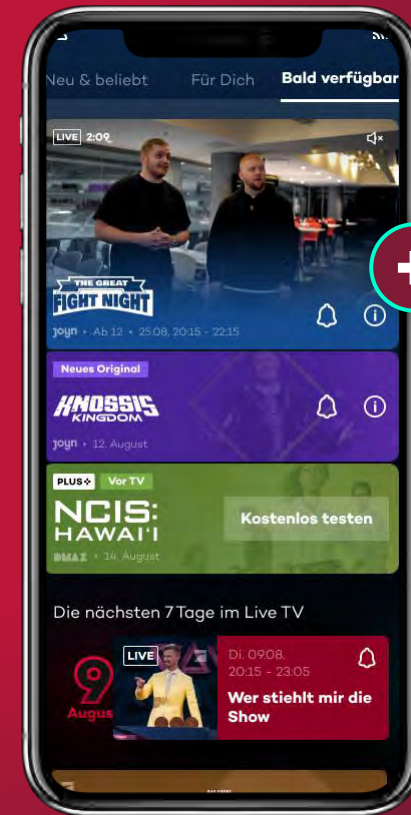
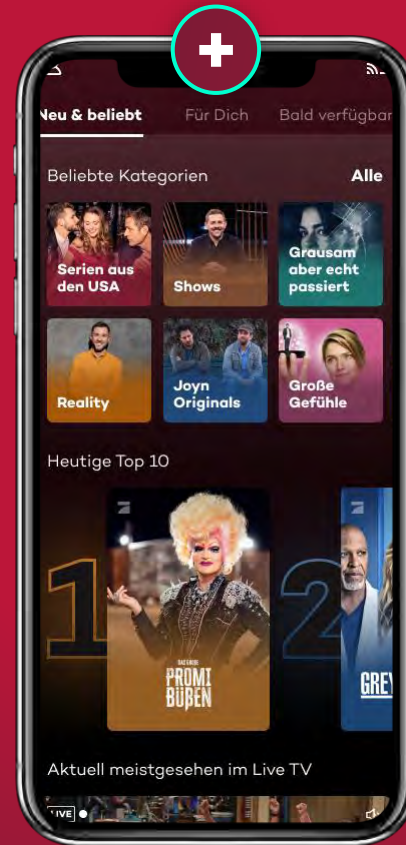
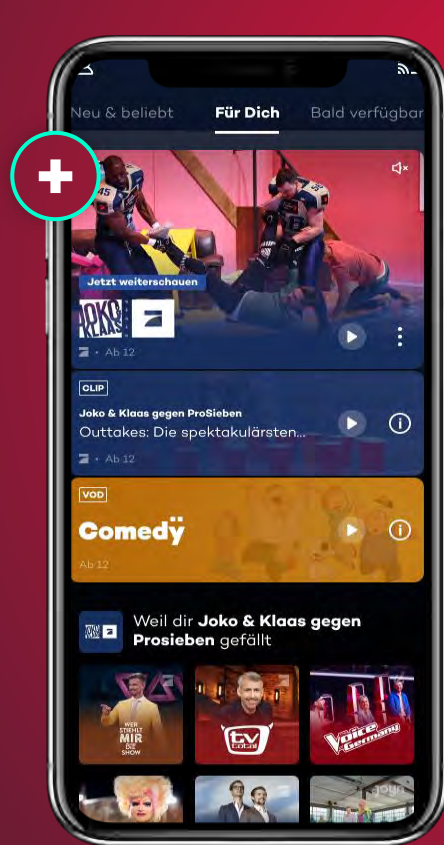
PRODUCT INNOVATIONS

NEW NAVIGATION

For a better overview:
New & Popular | For You | Available Soon

NEW HERO AREA

Increase visibility of content | Autoplay



AVAILABLE SOON AREA

Announcement of new format highlights | Reminders & push notifications

NEW BIG SCREEN EXPERIENCE: LIVE 2.0

Neu & Beliebt

Für dich


Live TV

Serien

Filme

Sport

THE WOMAN KING

 • Ab 16 • 130 Min. • Action, Abenteuer, Historisches Drama

Oscar-Gewinnerin Viola Davis in einem von wahren Ereignissen inspirierten Drama: Das afrikanische Königreich Dahomey ist in Gefahr. Generalin Nanisca, die Anführerin der weiblichen Eliteeinhe...

