



JOYN

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01

THIS IS JOYN

Success confirms our strategy. Three record quarters in succession and in Q3 we continue to see strong double-digit growth in monthly video users and viewing time compared to the previous year.

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.

REASONS WHY JOYN IS THE BEST PARTNER FOR ADVERTISERS:

- **AVOD:** As the largest free AVOD aggregator in Germany, Joyn connects people and brands and outshines its competitors with an innovative, ad-supported model based on the power of advertising.
- **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.

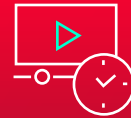
PLATFORM



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

~45K
hours of
programming

JOYN – ONE PLATFORM FOR EVERYONE



VIEWERS

Third record quarter in succession

6.9 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

+27.5%
vs. previous month



WATCH TIME

+33%

2024 INVENTORY

LARGEST FREELY ACCESSIBLE ADVERTISING INVENTORY
IN PREMIUM VIDEO STREAMING

7.4

billion MAIs in
DE*

joyn

3.4

billion MAIs in
DE**

RTL +

2.4

billion intl.
MAIS***

prime

10.5

billion MAIs in 2025*

GROWING USER NUMBERS

JOYN IS EXPANDING ITS VIDEO USERS.

+27.5%

monthly video users from Sept. to Okt. 24*

+53%

monthly video users in Q3**



TARGET GROUP RELEVANT TO ADVERTISING

JOYN OFFERS AN ATTRACTIVE USER BASE.

62%

E 25-49

>68%

NHI > €3,000

61%

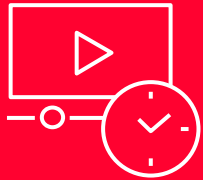
Big screen share in November

joyn



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

VIEW-THROUGH RATE



96% 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

STRONG INVESTMENT IN JOYN

INVESTMENT IN CONTENT



2024:
+30% increase in Joyn
Originals

2025:
+50% increase in Joyn
Originals

INVENTORY PUSH

2024:
7.4 billion MAIs

2025:
> 10.5 billion MAIs

PARTNERSHIPS



2024 + 2025:
Strong distribution
deals

New content
partners

MARKETING ACTIVITIES



Budget increased by
62%

Ongoing brand
campaigns

PLATFORM & UX IMPROVEMENT



New live experience

Better content
discovery

Development of new
theme worlds

Editorial program
magazine

Shopping option

04

CONTENT

GIANT IN REACH

OUR STRONG CHANNEL FORMATS energize THE LIVE STREAM



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?

+20.3%

incremental viewers (E 14-19 years)

+5.4% 2023



LANDARZTPRAXIS 2. STAFFEL

+21.1%

incremental viewers (E 14-19 years)

+17.7% 2023

JOYN ORIGINALS SUPPLEMENT CHANNEL FORMATS

EXPANSION OF JOYN ORIGINALS



2024: Development of COMEDY & REALITY genres

2025: Extension of ADVENTURE & FOOD genres



FACE-DRIVEN CONTENT

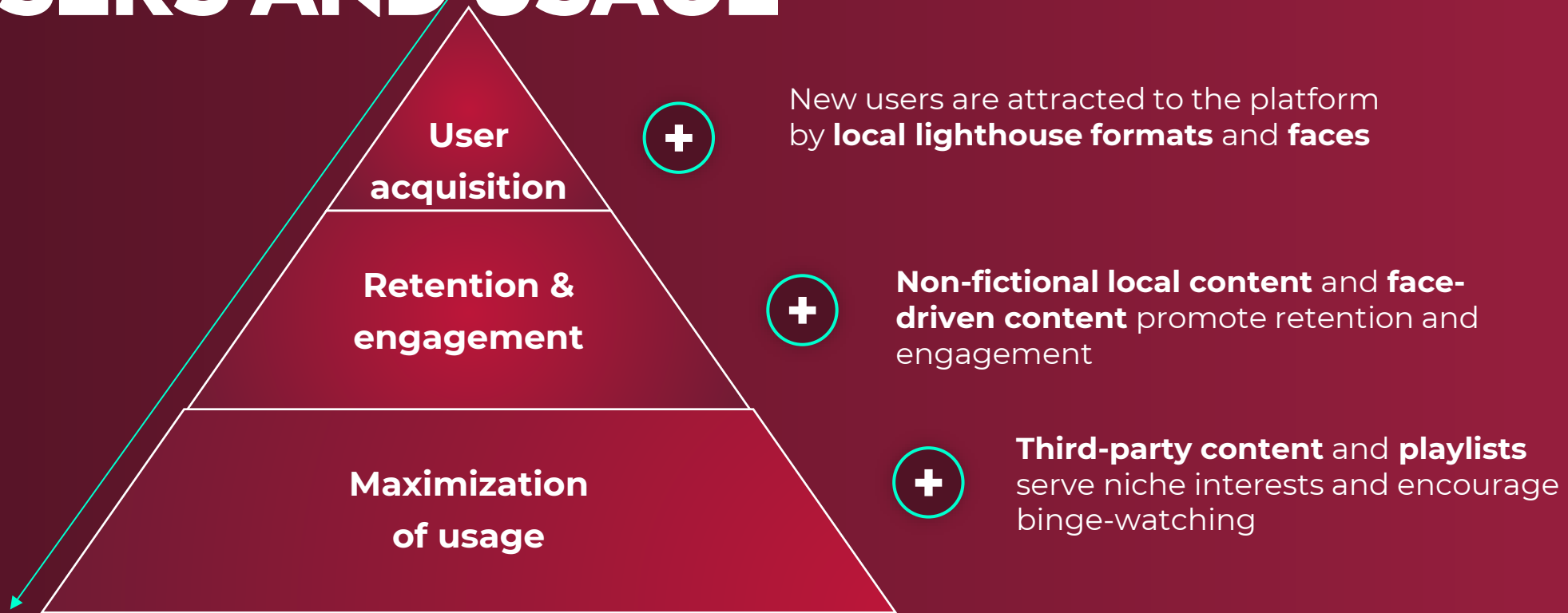
Support for relevant creators to develop new Joyn faces



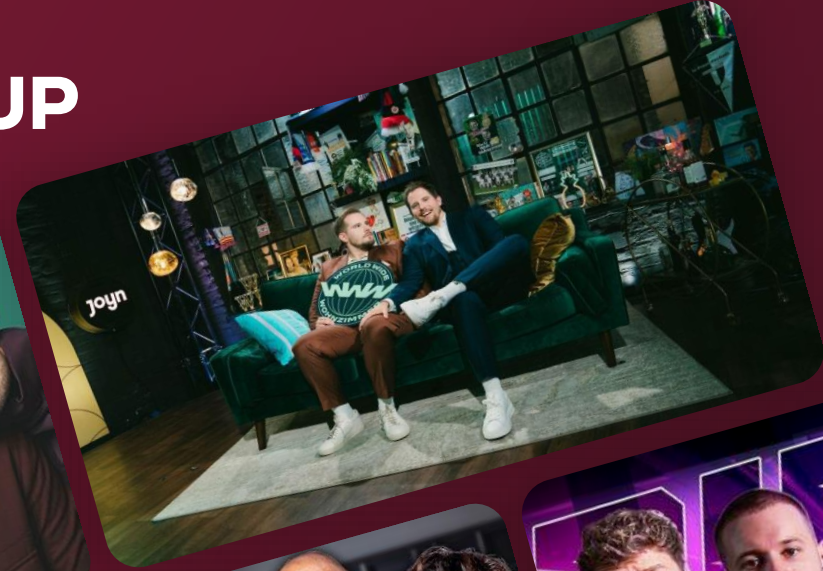
TV EXTENSIONS

Additional current TV formats & innovative enhancements

EVERYTHING ON JOYN: FURTHER INCREASE USERS AND USAGE



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



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.

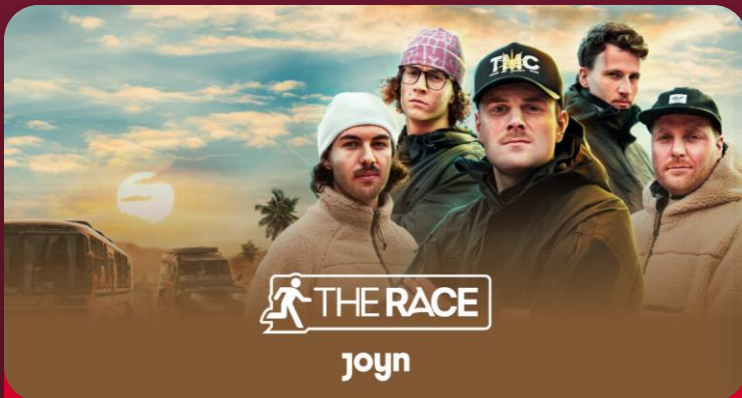
User retention & maximization of usage



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

FACE-DRIVEN CONTENT

RELEVANT SUCCESSES WITH THE CROSS-PLATFORM CONCEPT



The Race has gained **more than 50% new users** through the windowing logic of offering formats only via a preview on Joyn.



Otto Bulletproof attracts its followers to Joyn and Kabel Eins across the various channels.



The Wolter twins had already attracted cross-media attention with their own social content and network before their first show.

SUCCESSFUL FORMATS IN THE GENRE: ADVENTURE & FOOD



Daily user figures like our TOP TV format "Wer stiehlt mir die Show"



Among the TOP 30 Joyn shows Sept.-Oct.

REACH EVERY TARGET GROUP WITH JOYN

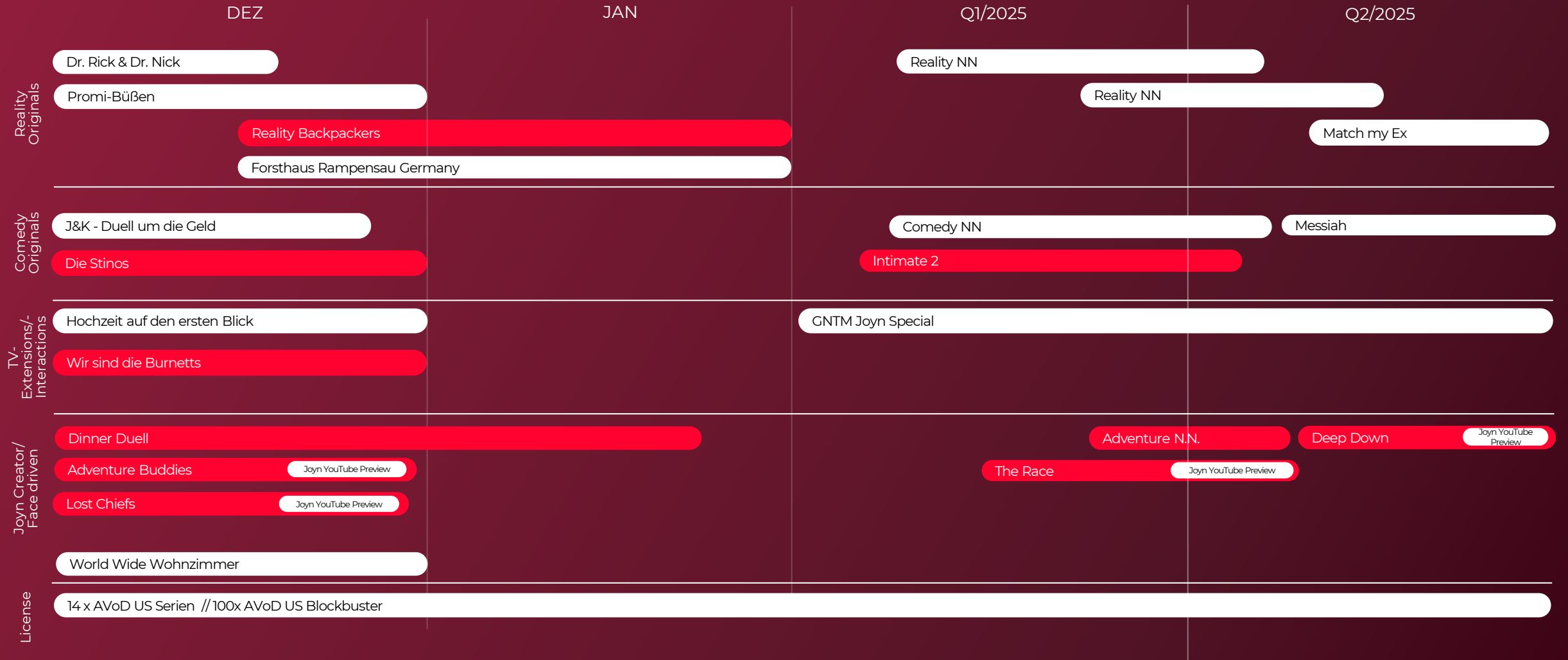


- > Face-driven content (VoD & live)
- > Children's media libraries & FAST** aggregation

- > 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 CONTENT ROADMAP 2024/2025



CONTENT OUTLOOK Q4 2024 + 2025

TOP 30 GENRE COMPETENCE

2024

2025



CHANNEL FORMATS

Germany's
Next Topmodel



COMEDY

Comedy Street



REALITY

Good Luck Guys



CHANNEL FORMATS



ADVENTURE



FOOD

PREMIUM BROADCASTER CONTENT ON ALL DEVICES



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 HOME: CUSTOMIZED, INDIVIDUAL CURATION

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

WHAT COMES NEXT

01

CREATION OF UNIQUE THEME WORLDS:

Optimized for different user situations. Creates variance and relevance for every user.

02

IMPLEMENTATION OF A COMPREHENSIVE PUBLISHING AREA:

Editorial program info and background on the entire TV and streaming landscape as well as beyond our own formats.

03

INTEGRATION OF NATIVE ONLINE SHOPPING:

Smart product presentation that activates target groups and boosts awareness and sales of customer brands.

