



Next Generation Media. Next Generation Regulation.

39th epra Meeting

Heiko Zysk
VP Governmental Relations & Head of European Affairs
ProSiebenSat.1 Media AG
Budva, 5 June 2014

TV is the powerhouse for all means of distribution.

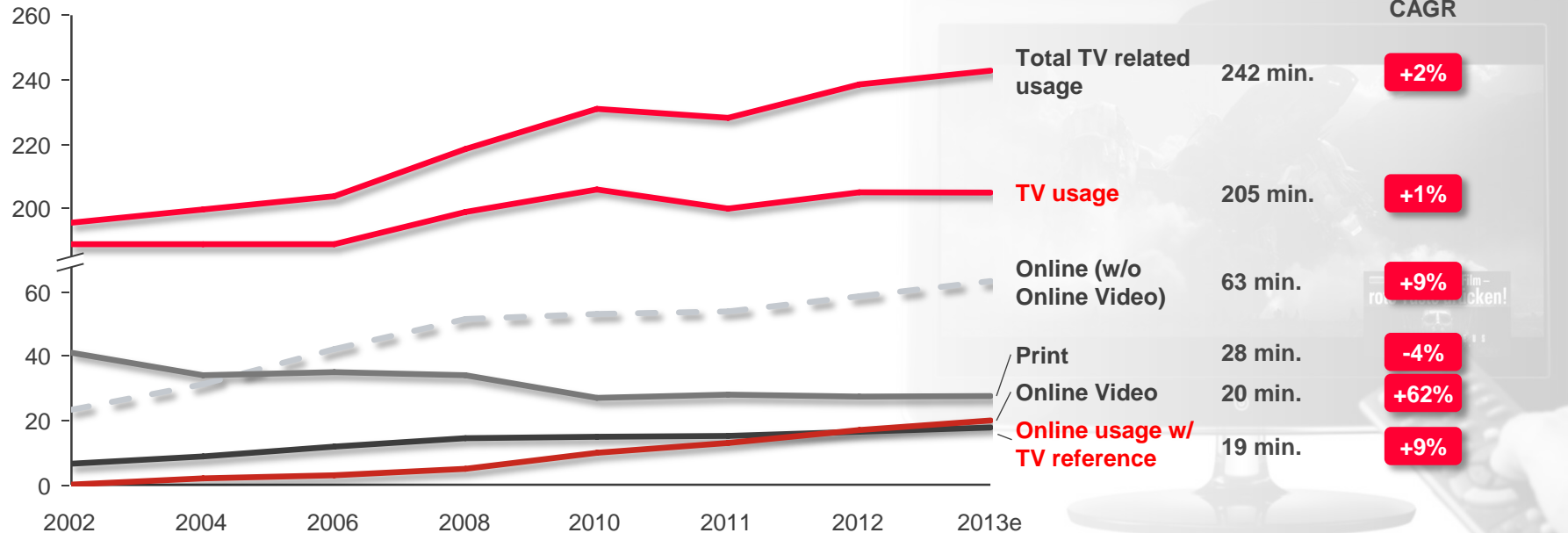


Successful Television drives the whole digital value chain.



TV continues to dominate media consumption, Online Video as additional growth opportunity

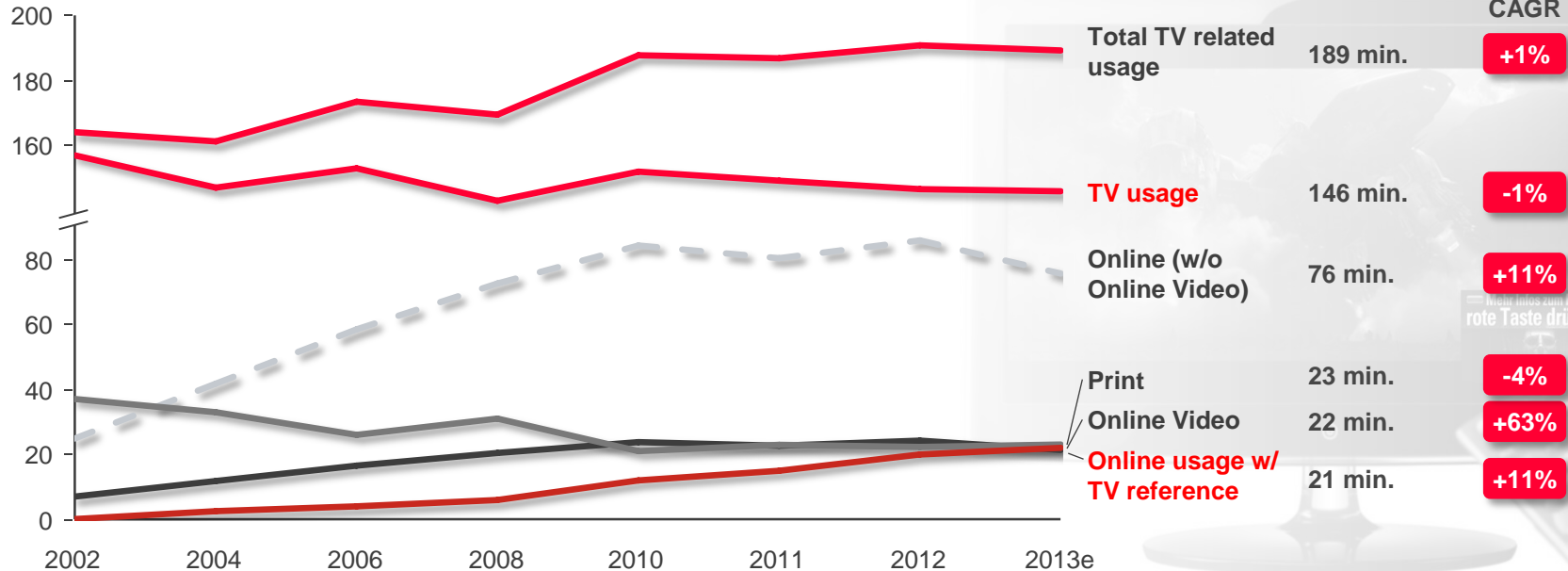
Average daily usage in Germany
[in minutes, age group 14-49 years]





In the young target group TV is the lead medium. And online, TV content dominates video.

Average daily usage in Germany
[in minutes, age group 14–29 years]





TV and Online do not live in separate worlds any longer. Neither should Regulation.

Germany's Next Topmodel



22.4m
video views

- **22.4m** video views – thereof **24% web-only** content
- Strong social media presence: **No.1 German Social TV Facebook site** in terms of fan activity index¹⁾
- Ramp-up campaign before TV start generates **700k** views

- Cross-media story telling starting before TV airing with **250k** video views in ramp-up phase
- **6.9m** video views in total – thereof **14% web-only** content

The Voice Kids



6.9m
video views



If we had to identify one single issue for this decade: Securing access to content is the “Now & Next Big Thing”



Fair Access is key

- 1 Platforms must ensure fair and unbiased access
- 2 Search must enable viewers and users to access legitimate content
- 3 Devices must not enable parasitic overlays
- Regulation must focus on bottlenecks





Regulatory Framework: What's hot, and what's not

What's hot

Understanding that all competition is global in the 21st century.

Content-and Bottleneck centric regulation.
Converging Media needs Converging Regulation.

Global & flexible standards for fair business practices, editorial responsibility and values

Timely but thorough analysis of existing regulation, "Article by Article".

Enabling all European media service providers to compete in fair competition

What's not

Living in the analogue past of guarded national markets and national regulation.

Device- or Distribution-centric regulation:
Linear vs. non-linear is dead.

Statutory & static Micro-Management of Quantitative Advertising, Quotas and similar "analogue" standards

Hectic and "fab-oriented" editing of existing regulation.

Forcing European media service providers to go abroad to invest in future services



This presentation contains "forward-looking statements" regarding ProSiebenSat.1 Media AG ("ProSiebenSat.1") or ProSiebenSat.1 Group, including opinions, estimates and projections regarding ProSiebenSat.1's or ProSiebenSat.1 Group's financial position, business strategy, plans and objectives of management and future operations. Such forward-looking statements involve known and unknown risks, uncertainties and other important factors that could cause the actual results, performance or achievements of ProSiebenSat.1 or ProSiebenSat.1 Group to be materially different from future results, performance or achievements expressed or implied by such forward-looking statements. These forward-looking statements speak only as of the date of this presentation and are based on numerous assumptions which may or may not prove to be correct.

No representation or warranty, expressed or implied, is made by ProSiebenSat.1 with respect to the fairness, completeness, correctness, reasonableness or accuracy of any information and opinions contained herein. The information in this presentation is subject to change without notice, it may be incomplete or condensed, and it may not contain all material information concerning ProSiebenSat.1 or ProSiebenSat.1 Group. ProSiebenSat.1 undertakes no obligation to publicly update or revise any forward-looking statements or other information stated herein, whether as a result of new information, future events or otherwise.



Heiko Zysk
ProSiebenSat.1 Media AG
Vice President Governmental Relations & Head of European Affairs

heiko.zysk@prosiebensat1.com