

AGF VIDEOFORSCHUNG

Video research in Germany

Frankfurt, January 2026

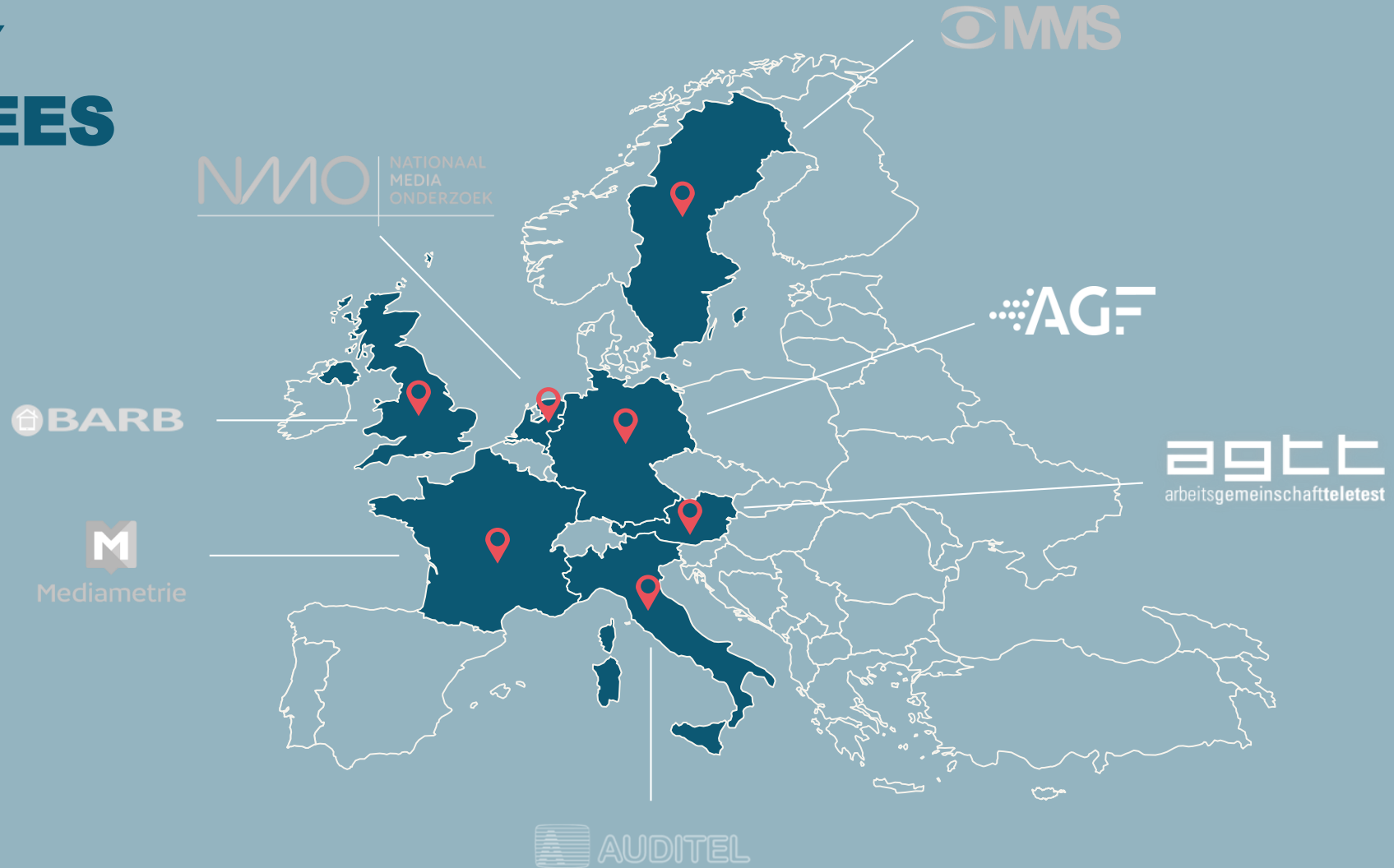
AGF Videoforschung GmbH

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1. REACH RESEARCH IN THE AGF SYSTEM

JOINT INDUSTRY COMMITTEES (JICs)





Die
Media
Agenturen



Reach research in the AGF system

A JIC in the legal form of a GmbH

Shareholders & Supporters of AGF
Videoforschung GmbH

PRINCIPLES OF AGF RESEARCH

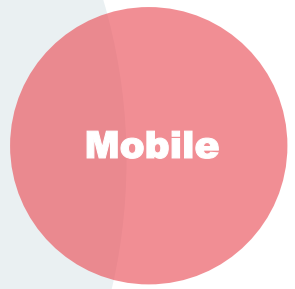
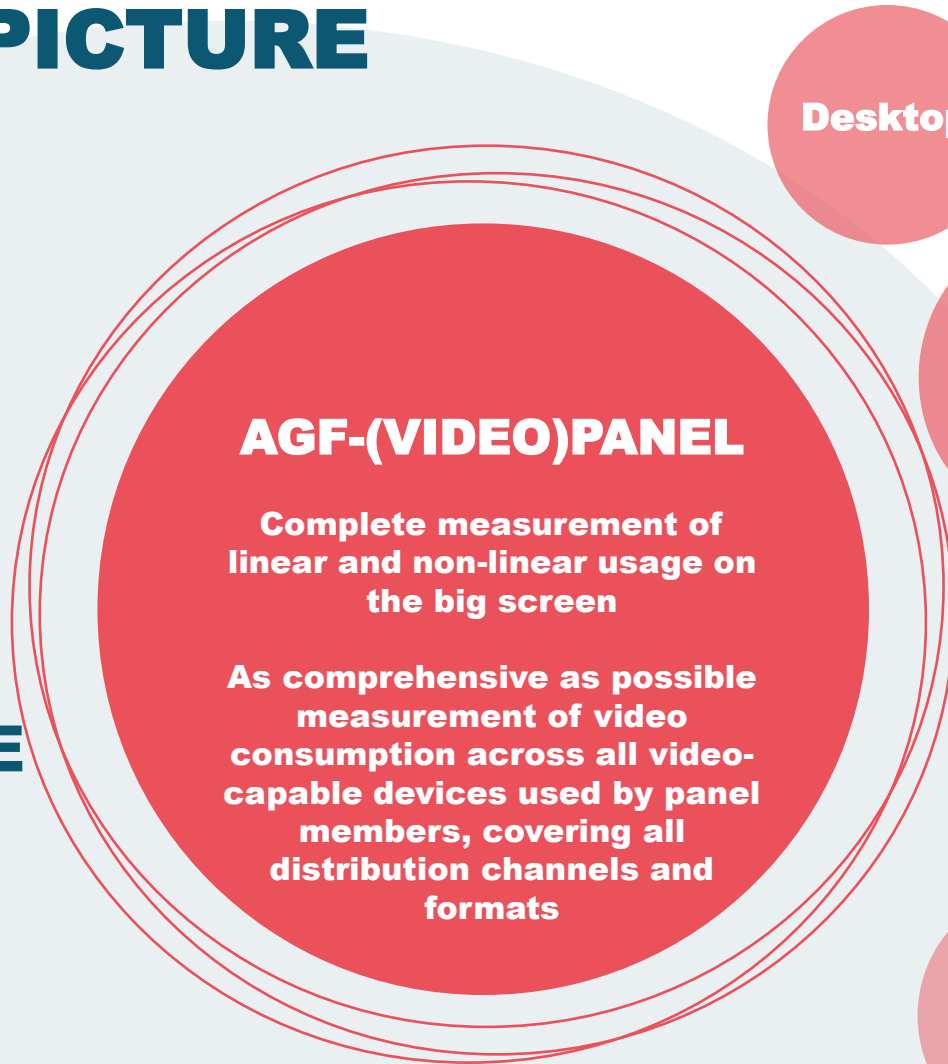
Providing a standard for the German market

- Independent
- Neutral
- Transparent
- Open to all market players
- Without discrimination
- Comparable data
- Continuous further development
- Aligned with central requirements of the media and advertising markets

> 40 million euro research investments

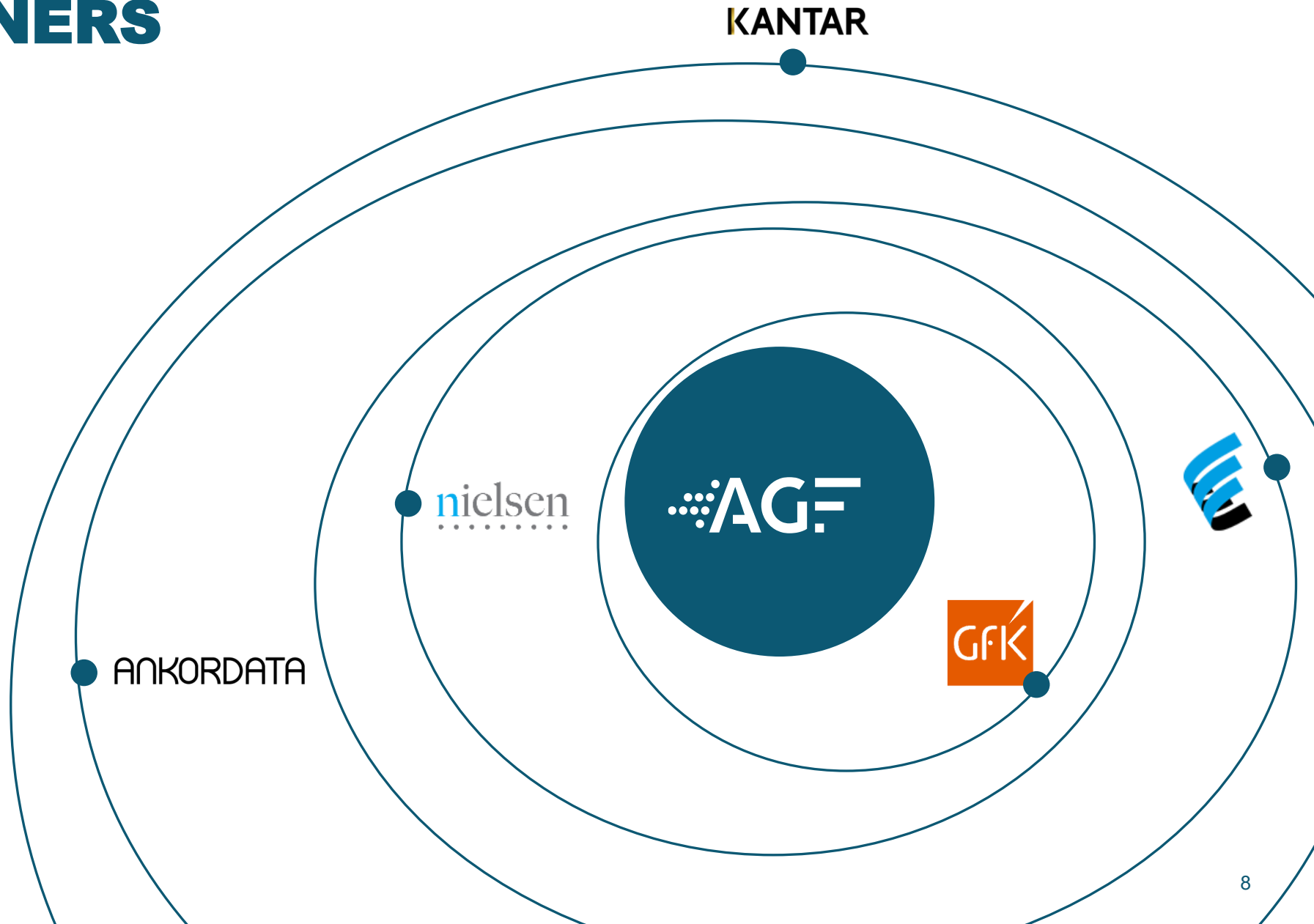
BIG PICTURE

SINGLE SOURCE



Audience Research in the AGF System

STRONG PARTNERS



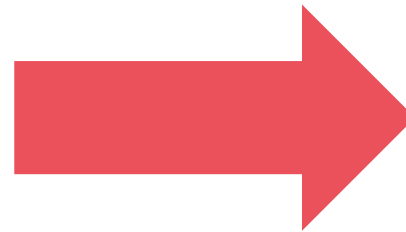
2. THE AGF PANEL

FROM TV PANEL TO AGF PANEL



TV PANEL

TV households in Germany
with a German-speaking Main Income Earner
(MIE)



AGF PANEL

TV and non-TV households in Germany
with a German-speaking Main Income
Person (MIP)

The AGF Panel

THE AGF PANEL



AGF PANEL

TV/video households in the Federal Republic of Germany with a German-speaking Main Income Earner (MIE).



41,0332 Mio.

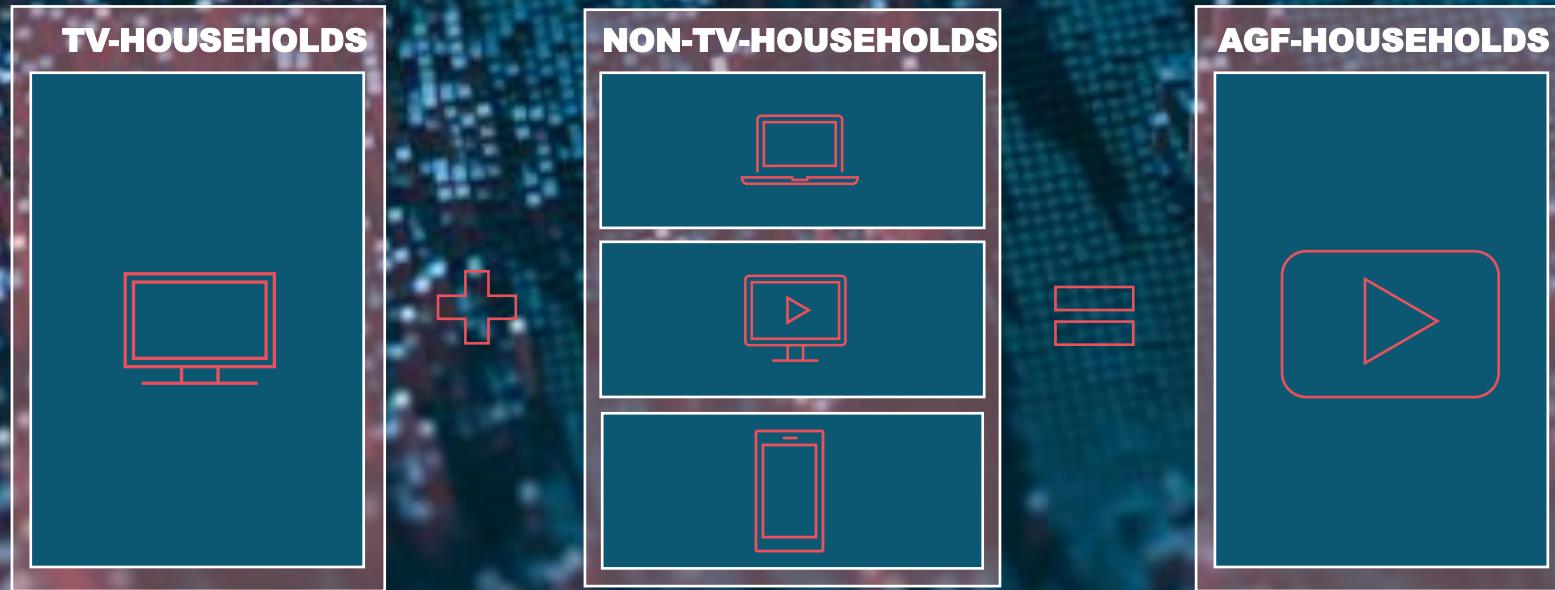


79,463 Mio.

- 5,400 households with around 11,000 panelists, 8,500 systems
- Measurement of guest and out-of-home usage
- Recruitment: Random (Random Route / CATI)
- Measurement (live, time-shifted) via TC UMX from approx. 280 channels
- Addition of single source elements (AGF Smart Meter)

Market Standard for Video

TOTAL POPULATION WITHIN MARKET STANDARDS



 **38,590 Mio.**

 **75,343 Mio.**

 **2,443 Mio.**

 **4,120 Mio.**

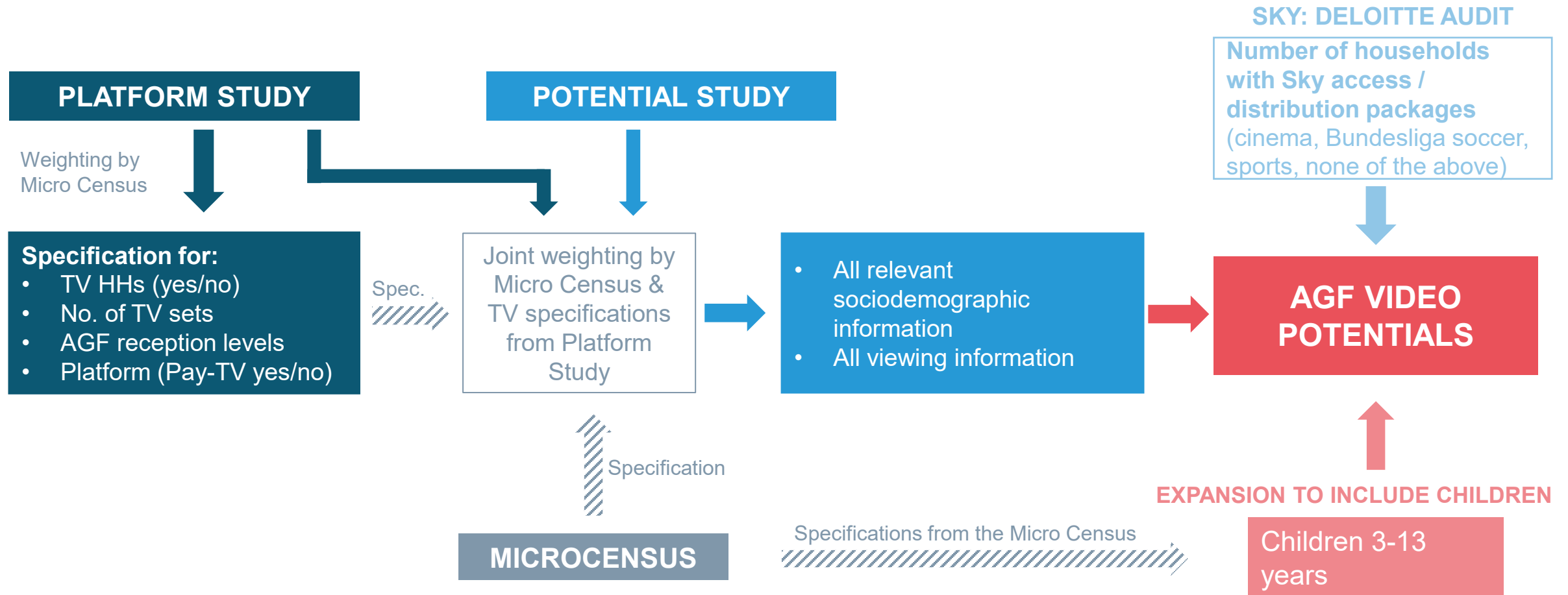
 **41,033 Mio.**

 **79,463 Mio.**

External specification



AGF VIDEO POTENTIALS

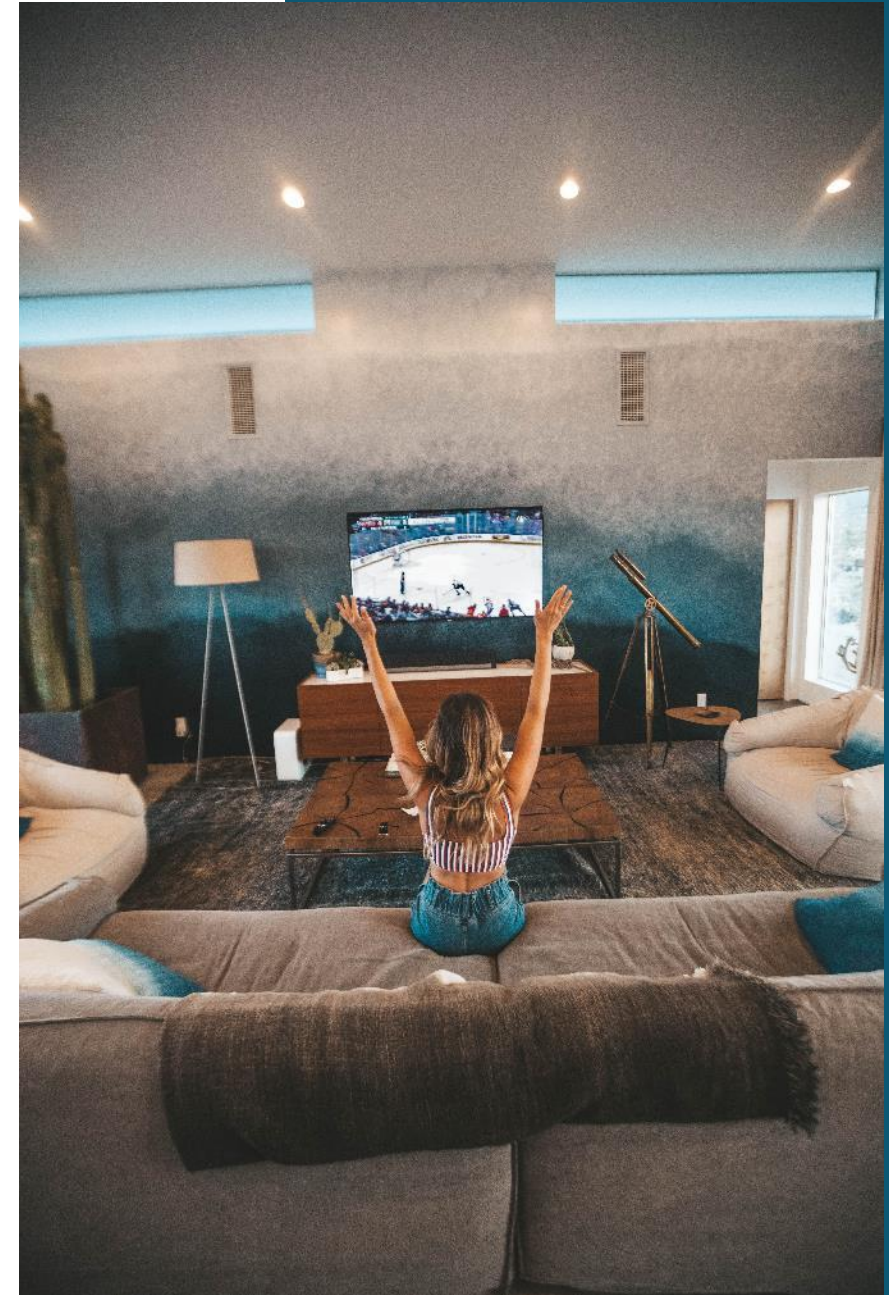
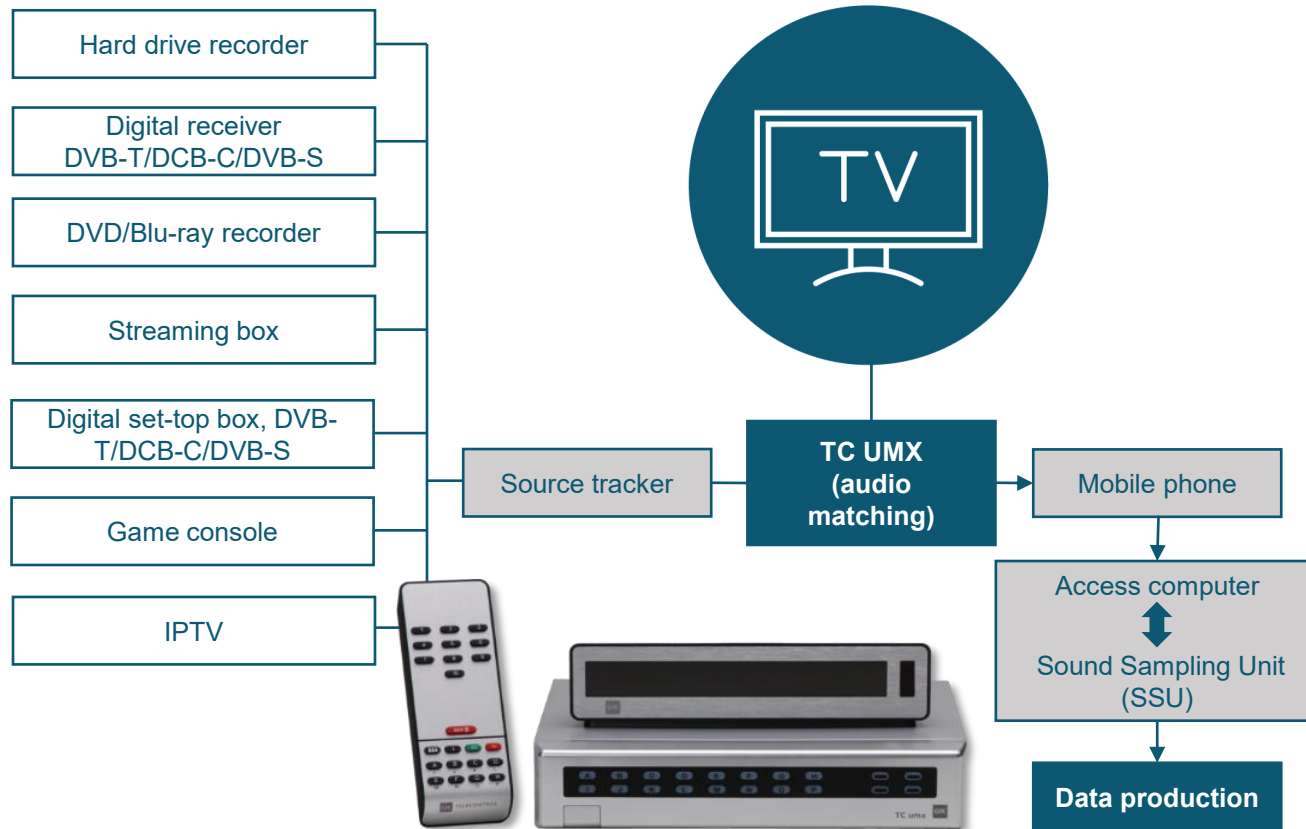


The AGF Panel

MEASUREMENT TECHNOLOGY

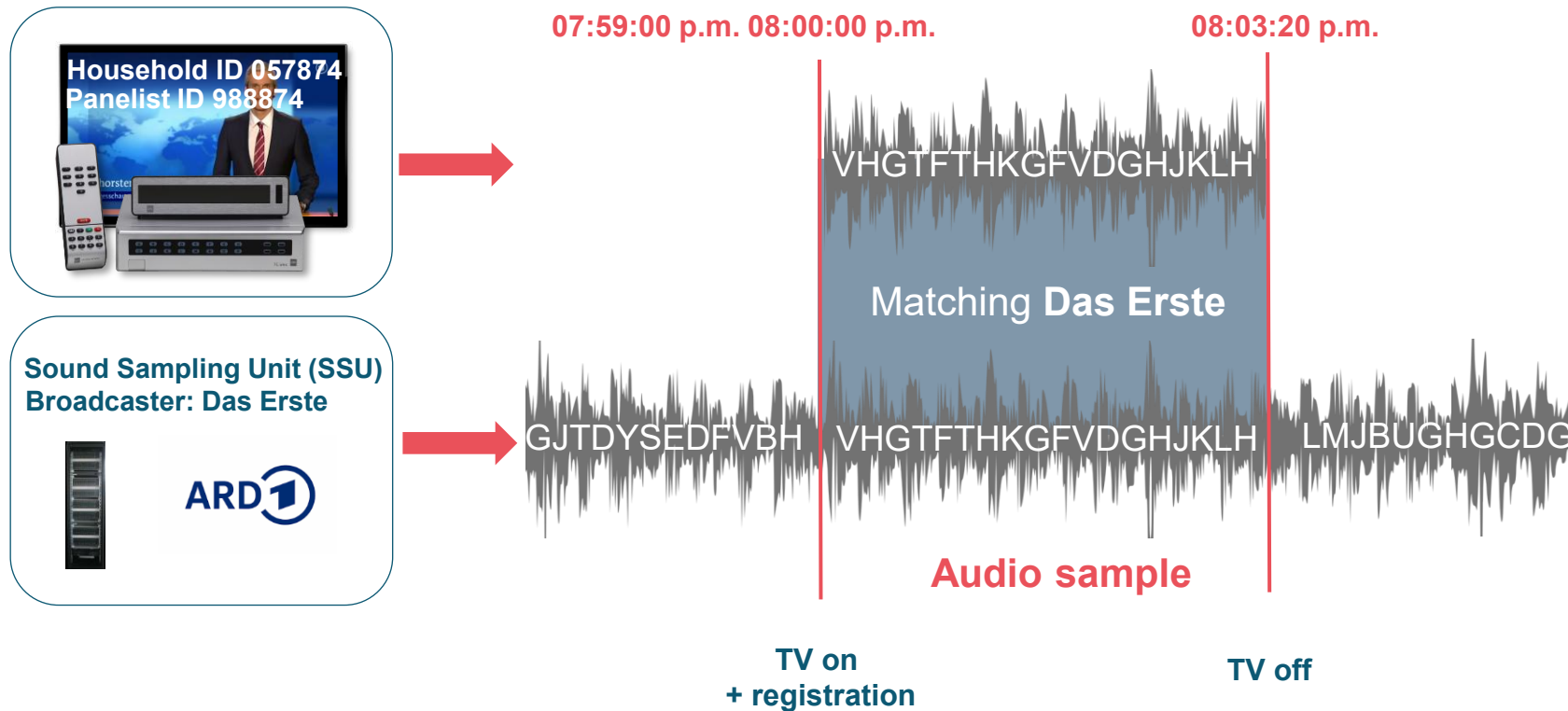
Measurement technology setup in households per TV set

External video sources



The AGF Panel

AUDIO MATCHING



- Audio patterns are captured by the UMX and sent to the server
- The SSU references about 400 soundtracks
- A matching algorithm compares both samples for identity

3. STREAMING MEASUREMENT

Market Standard Total Video



PANELS AS „THE SOURCE OF TRUTH“



Each day, over 30,000 panelists from three panels provide data for AGF

STREAMING MEASUREMENT: HYBRID MEASUREMENT APPROACH

1

CENSUS MEASUREMENT



2

PANEL MEASUREMENT



THE DESKTOP PANEL

DESKTOP PANEL

Persons who in the previous four weeks used the internet (PC, laptop) at least once



54,409 million

- Active sample: 10,650 panelists (3+)
- Measurement via on-device meter and census data points
- Buildout of single source core DSK/MBL
- Calibration by census measurement
- Operating systems: Windows, Mac OS
- Data merged to the TV panel since 01/2017
- Self-recruitment of individual panelists, with the possibility of including other household members in the DSK Panel measurement if devices are used collectively (capture of use by children < 18 years of age)

THE AGF MOBILE PANEL

MOBILE PANEL

Persons who in the previous four weeks used the internet while mobile (smartphone, table) at least once



58,500 million

- 10,650 panelists (18+)
- App and browser measurement
- Smartphones and tablets (iOS and Android)
- Recruiting: web-based, also in desktop panel
- Buildout of single source core DSK/MBL
- In-home & out-of-home measurement
- Calibration by census measurement
- Integrated in the data production process since 3/19

Video market standard



AGF MEASUREMENT: FIT FOR THE FUTURE



**Audio-matching
Watermarking**



**Measurement router
(single source)**



**Nielsen Tagging
(consent-less)**

Streaming measurement: AGF Smart Meter

ROUTER MEASUREMENT: AGF SMART METER

Single source expansion

- Measurement of all Internet-capable devices via router technology
> Single-source data for TV and streaming
- Link to streaming measurement
- Passive measurement of services at high aggregation levels that do not participate in AGF streaming measurement
- AGF Panel:
 - Currently more than 3,600 installed households

For more details and the current report:
www.agf.de/daten/agf-smart-meter

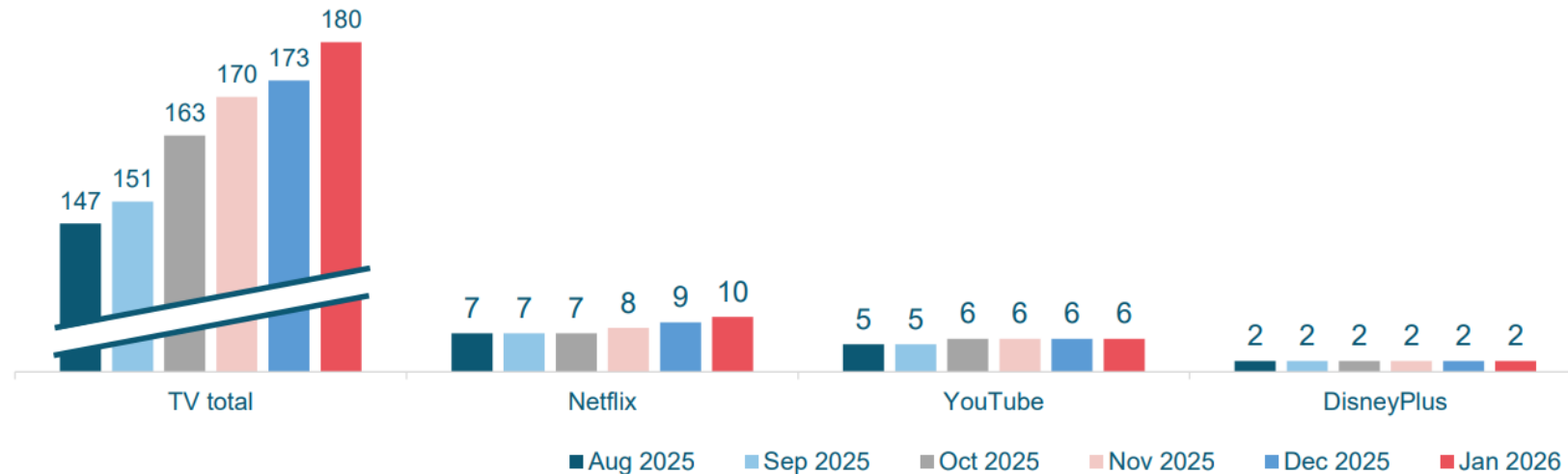
AGF Smart Meter: Video Standard Usage

AVERAGE VIEWING DURATION

AUGUST 2025 - JANUARY 2026

Usage of TV-Content total and selected digital platforms on Smart-TVs (Viewers Total)

Ø-VIEWING DURATION (MIN.)/DAY



Source: AGF Videoforschung; AGF SCOPE 1.14; 01.08.2025-31.01.2026; Market standard: TV; Analysis type TV-Interval; product-related; Package number: 17095 vom 10.02.2026
Depiction of digital platforms on Smart-TV based on AGF Smart Meter pilot project; individual calculations

4. CONVERGENCE DATA

MERGER PROCESS INTO THE AGF PANEL

Online Panels

- Measured streaming usage from the Desktop and Mobile Panel

AGF Panel

- Weighted AGF Panel composed of persons in TV and non-TV households
- Transfer of real streaming usage to online users in the AGF Panel

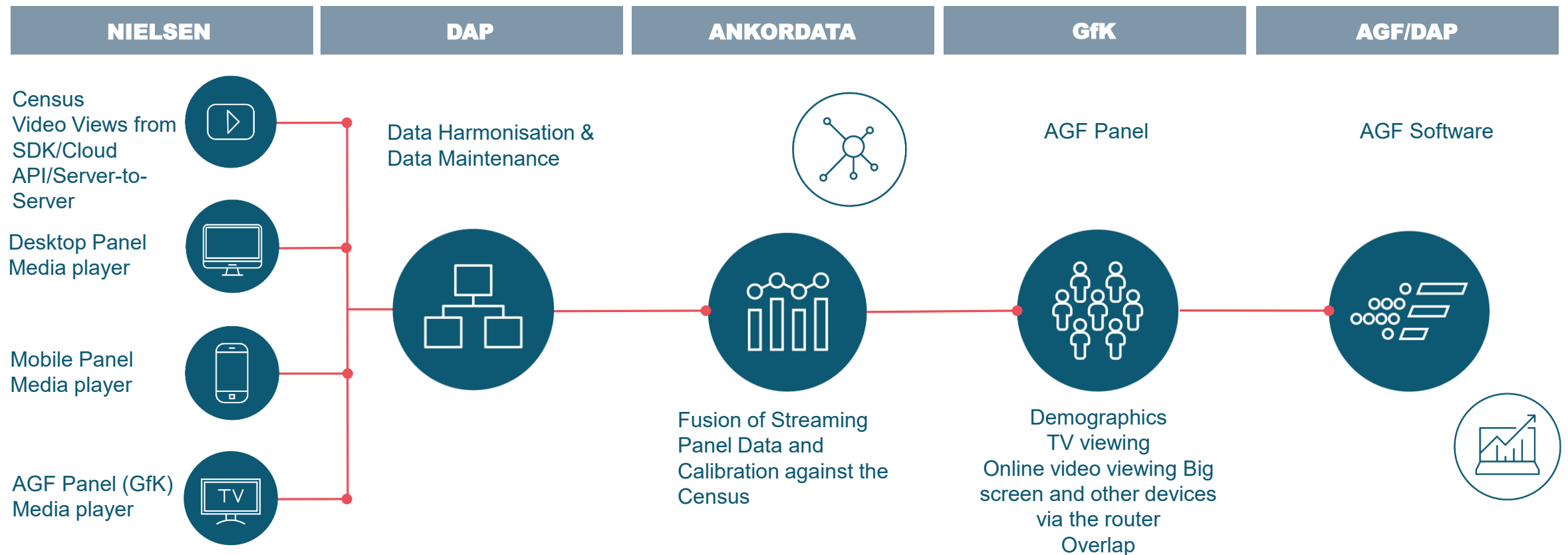
AGF Panel

- Weighted AGF Panel composed of persons in TV and non-TV households with TV and streaming usage as convergent data basis

Merger
of streaming usage

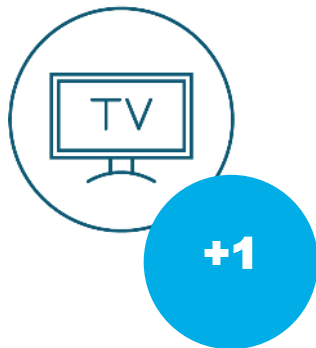
Calibration
by census and model specifications

DATA PRODUCTION PROCESS

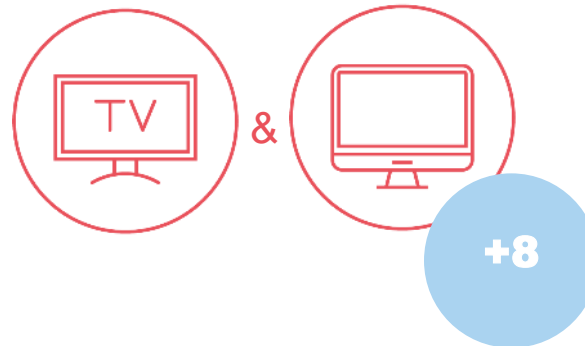


DAILY CONVERGENCE DATA

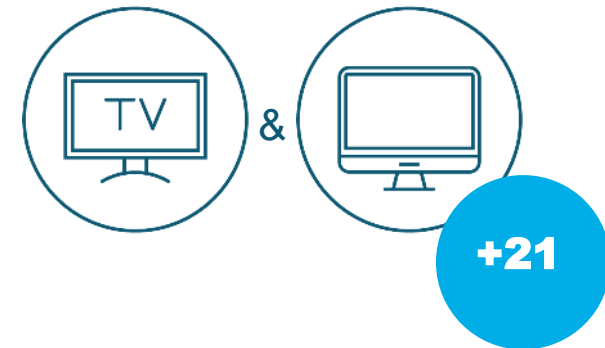
TV viewing data,
provisional



TV viewing data, final (incl.
24/7 LS) +
convergent (TV & streaming)



Consolidated
viewing data



EVALUATION AGGREGATIONS

PROGRAM BRANDS – CROSS-MEDIA REACH FOR STRONG BRANDS

"Content is King"

- Across all channels, devices and platforms (under measurement)
- Measurement of linear and non-linear content with each other and not against each other
- Decoupling from linearity (use connection)
- Program brands are based on clear and informative definitions/conventions
- Manageable number of useful metrics: **usage volume, gross reach and cumulative net reach**
- Program brands as robust and stable planning units



Evaluation aggregations**NEW AGGREGATIONS – PROGRAM BRANDS IN
APRIL 2023 – CUM. NET REACH IN MILLIONS****tatort****Total viewers****35,498 Mio****34,047 Mio. via TV****3,366 Mio via streaming****1,451 Mio via streaming exclusively**

Evaluation aggregations

PROGRAM BRANDS IN AUGUST 2025 – CUM. NET REACH IN MILLIONS

Bundesliga pure

Highlights of the Bundesliga weekend digitally and on free TV on SPORT1 every Sunday

Total viewers

2,567 Mio. via TV

0,637 Mio. via Streaming

Adults 14-49 years old

0,545 Mio. via TV

0,302 Mio. via Streaming

EVALUATION SOFTWARE

(NEW) SOFTWARE SOLUTIONS OF AGF



AGF SCOPE was developed as a browser-based web application of AGF Videoforschung to evaluate TV, streaming and video usage behavior.

Therefore, access to AGF SCOPE is always possible for any place as long as there is an Internet connection.



TV CONTROL serves as an AGF Videoforschung software program for the integrated planning and monitoring of TV advertising campaigns.

The video market standard is likewise provided in TV Control.

It will be possible in the future to choose between the TV market standard and the video market standard.



The **REACH PLANNER** is a web-based AGF planning tool for cross-media reach values in the video market standard.

The **REACH PLANNER** is a strategic, rough planning tool to forecast campaign reach values and cost planning for TV, streaming and static-display.

It is planned to integrate additional measurement data bases into the tool.

5. EXPANSION OF DIGITAL MEASUREMENT: AGF X-REACH

BRINGING TOGETHER WHAT BELONGS TOGETHER

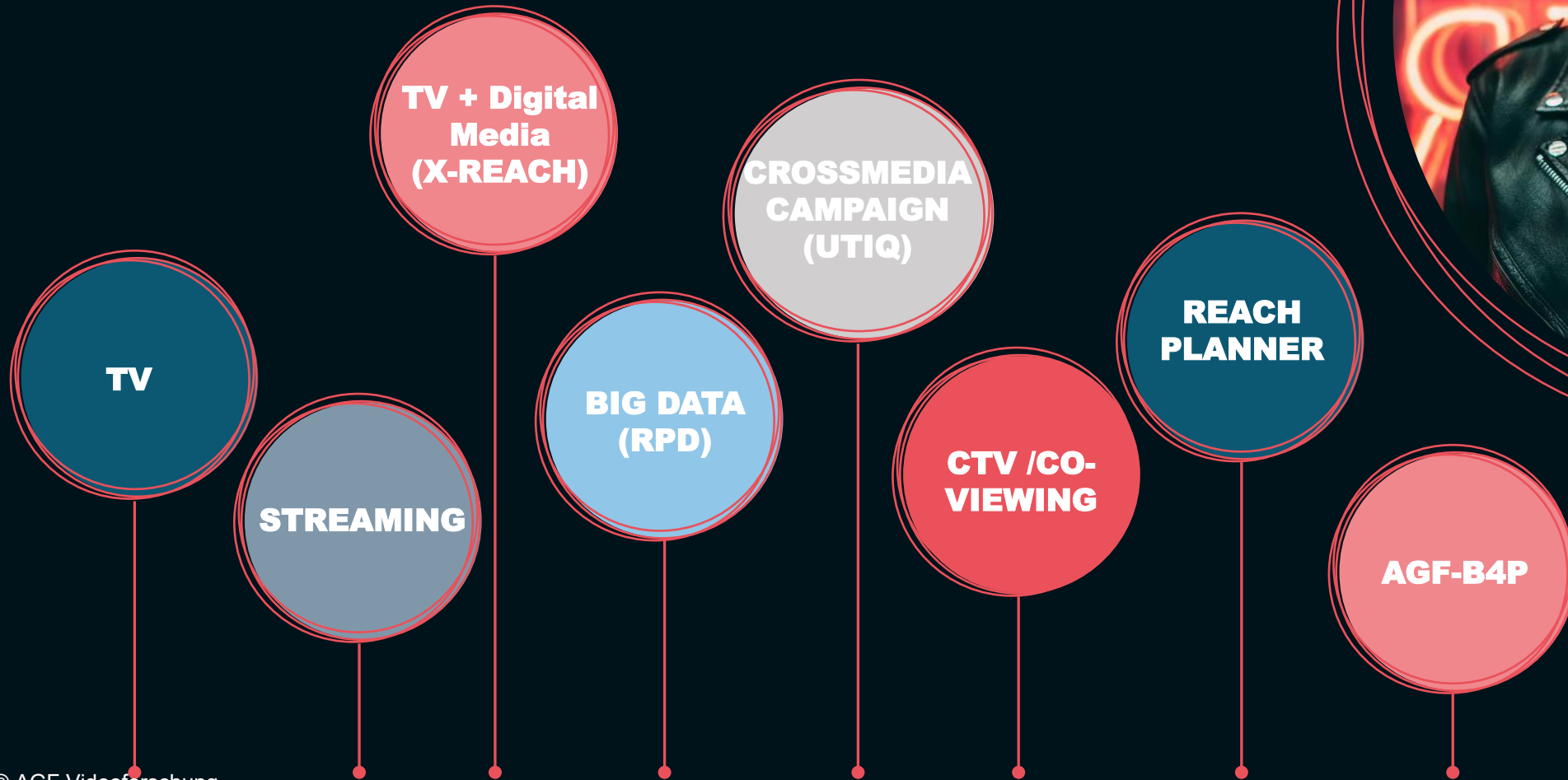
X-REACH



6. FURTHER TOPICS

Current Projects

ALONG THE USER JOURNEY



The AGF-System

COMPARABILITY IN A CROSS-MEDIA WORLD



- Advertisers have been demanding comparability for years (OWM and WFA have outlined this in their requirement papers)
- Audience data from panels plays a crucial role in verifying the reached target audience and calculating key performance indicators (e.g., GRP)
- Hybrid measurement approaches, like AGF, which combine panel data with technical measurement, provide a solid foundation for determining target group penetration, effective reach, and co-viewing information based on audience contacts
- The AGF approach offers the market a transparent, one-stop measurement solution.

Contact

www.agf.de

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