

# maxdome

Entertainment for you

# PAY VOD IS STILL IN ITS BABY SHOES IN GERMANY

## VIDEO-ON-DEMAND UNIVERSE

### Ad VOD

Consume an advertisement to gain access to a specific piece of content

### Pay VOD

#### SVOD

Subscription

Monthly subscription fee for unlimited access to select content

#### TVOD

Transaction

One-time transaction for 48h access to single movies, series episodes

#### EST

Elect. Sell Through

One-time transaction that permanently enables access to purchased items

# OUR SUBSCRIPTION MODEL IS THE CORE OF OUR SERVICE

## SUBSCRIPTION – SVOD



SCREEN FILME KIDS SO GEHT'S maxdome LOGIN ZUM STORE

KOKOWAAH  
3.10.2017

Entdecke das neue maxdome. Immer die beste Wahl aus 50.000 Filmen und Serien.

1 MONAT KOSTENLOS TESTEN >

Darüber nur 7,99€ / Monat, jederzeit kündbar

Kokowaaah - im maxdome Paket enthalten >

>50.000 TITLES FOR  
EUR 7.99 PER MONTH FLATRATE

## TRANSACTIONAL – TVOD/EST



SCREEN FILME SO GEHT'S maxdome store LOGIN ZUM KAUFT

ZUM LEIHEN

THE DANISH GIRL

Der Store: Die neuesten Blockbuster im Einzelabruf

JETZT KOSTENLOS ANMELDEN >

Ohne Vertragsbindung

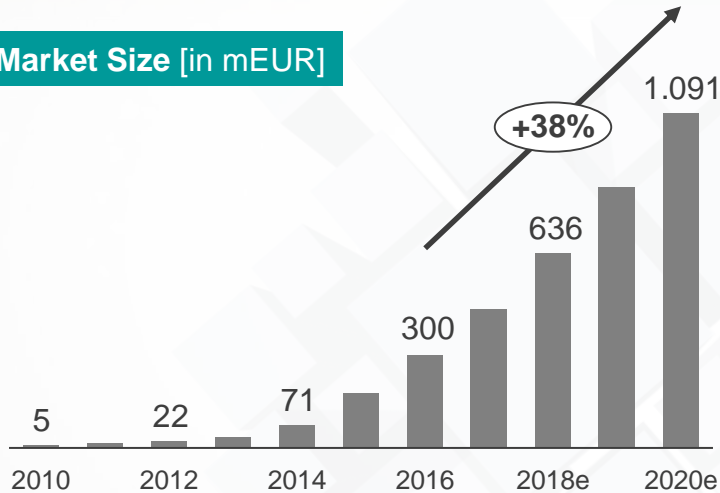
The Danish Girl - Ab 3,99€ leihen >

>10.000 TITLES INCL. "FRESH FROM  
CINEMA MOVIE" AS BUY/RENTAL

# GERMAN SVOD MUCH BIGGER SEGMENT THAN TVOD/EST

## SVOD IN GERMANY 2010-2020

Market Size [in mEUR]

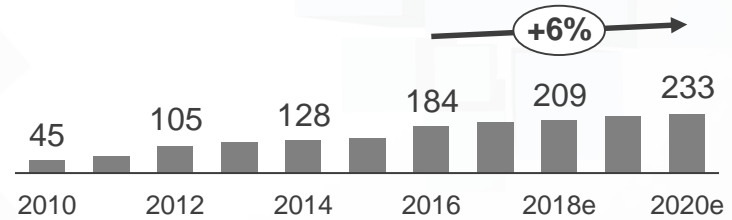


maxdome  
NETFLIX

amazon  
instant video  
sky TICKET

## TVOD/EST IN GERMANY 2010-2020

Market Size [in mEUR]

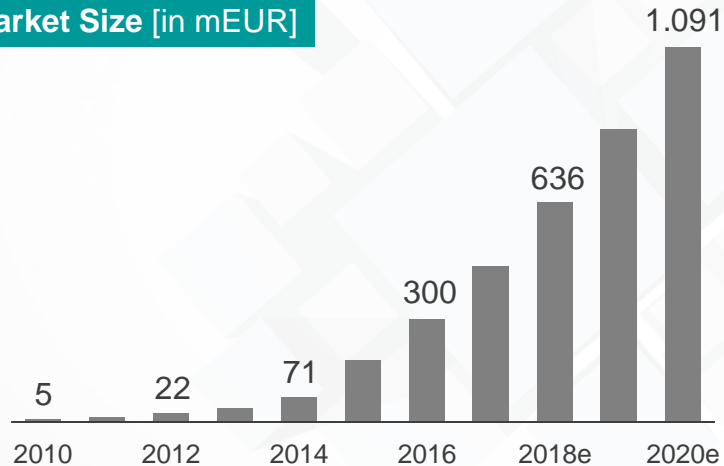


maxdome  
amazon  
instant video  
Videoload  
JUKE!  
sky select  
wuaki.tv  
SELECT VIDEO  
Kabel Deutschland  
Ein Vodafone Unternehmen.  
iTunes

# GERMAN SVOD HAS TAKEN OFF WITH MORE GROWTH TO COME

## SVOD MARKET IN GERMANY 2006-2020

Market Size [in mEUR]



Market Entry [SVOD]



# MAXDOME HAS BEEN **KEY DRIVER** IN MARKET DEVELOPMENT

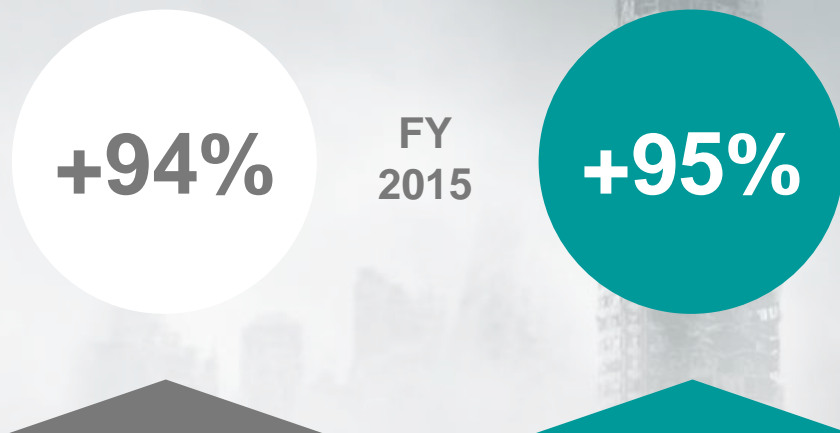
MAXDOME DOUBLES ITS  
SUBS BASE EVERY YEAR



**maxdome**

SUBSCRIBER  
DEVELOPMENT

GERMANY IS THE ONLY MARKET IN WHICH  
NETFLIX IS REALLY STRUGGLING



TOTAL SUBSCRIBER  
GROWTH GERMANY

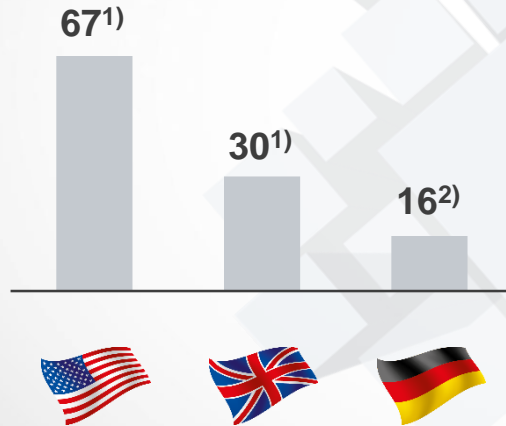
**maxdome**

SUBSCRIBER  
GROWTH

# SVOD HOUSEHOLD PENETRATION WILL DOUBLE UNTIL 2018

German penetration comparably low ...

SVoD Household Penetration 2016 [in %]



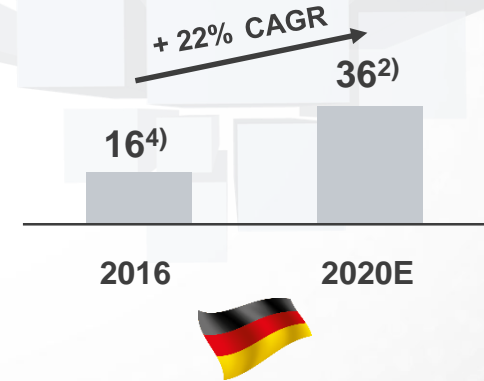
... but several new players<sup>3)</sup> entered the market ...

2006 Market Players



... as notable growth to come until 2020

SVoD Household Penetration<sup>5)</sup> [in %]



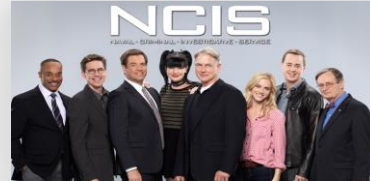
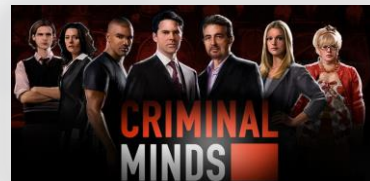
1) SVoD TV household penetration; Ofcom, Parks Associates, Nielsen. 2) P7S1 Analysis, based on Goldmedia, GfK, forsa, PWC, IHS Screen Digest, Ampere Research 3) SVoD. 4) P7S1 Analysis; 2015 EoY 5) based on 38.9m TV-Households in Germany

# maxdome

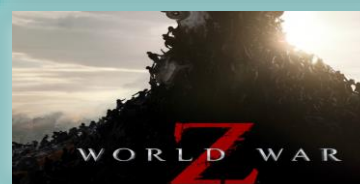
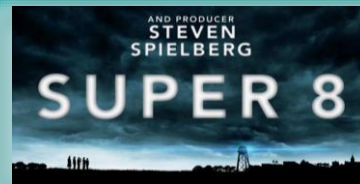
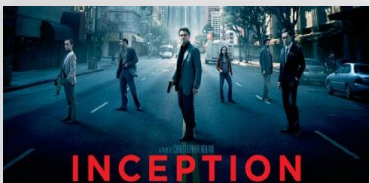
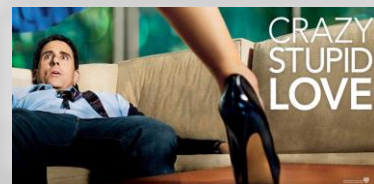
Entertainment for you



# WE COMBINE TOP US-SERIES AND EXCLUSIVE LOCAL HITS



# PLUS LEADING US-MOVIES AND TIMELESS MOVIE CLASSICS



EXCLUSIVES

WE ARE THE DESTINATION FOR **LEADING US-STUDIO CONTENT**

**FOX**



**SONY**



**CBS**

AND NOW WITH OUR **FIRST ORIGINAL SERIES JERKS.**





# MAXDOME USP: CURATED, EDITORIAL CONTENT DISCOVERY



Thomas Weiß  
maxperte™



Marie Biedermann  
maxperte™



Tristan Lehmann  
maxperte™



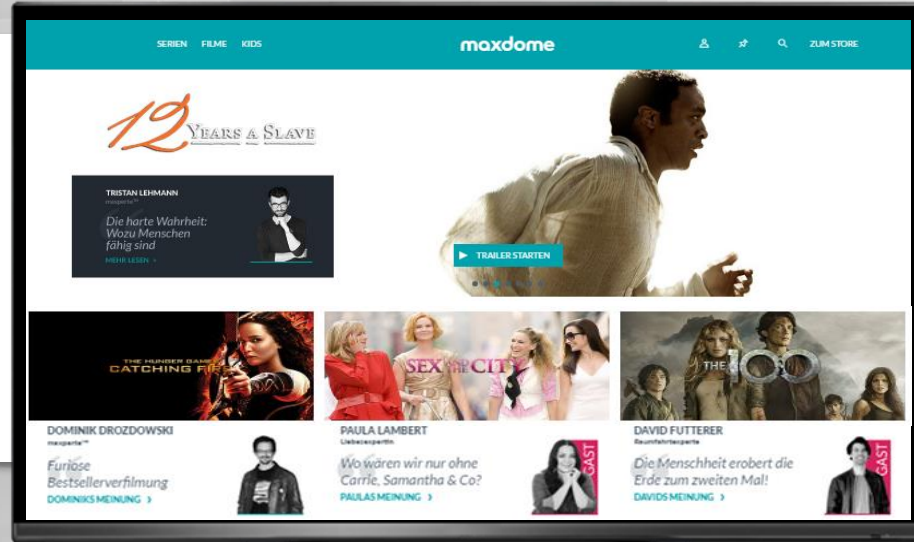
Vanessa Frodl  
maxperte™



Stefanie Bradish  
maxperte™



Carmen Meier  
maxperte™



Collien Ulmen-Fernandes  
Schauspielerin



Justin Leone  
Sommelier



Nelson Müller  
Sternkoch



Stefanie Heinzmann  
Sängerin



Paula Lambert  
Liebesexpertin



Ingo Lenßen  
Strafverurteilter

**DominiK Drozdowski**  
maxperte™

Parasitenbester und an vier Familien. Egal ob die Medien, Wissenschaft oder Multinationals für mich stehen, werden sie Menschen überleben. Menschen überleben auch noch anstrengende Themen mit an Bord sind, ohne Themen.

**Erliesene Filme**

DominiK Drozdowski  
maxperte™

Von den Buchseiten auf die große Leinwand - diese Adaptionen lohnen!

**Richtig futuristisch**

DominiK Drozdowski  
maxperte™

fliegende Autos, Roboter, Raumschiffe - die Zukunft wird fantastisch!

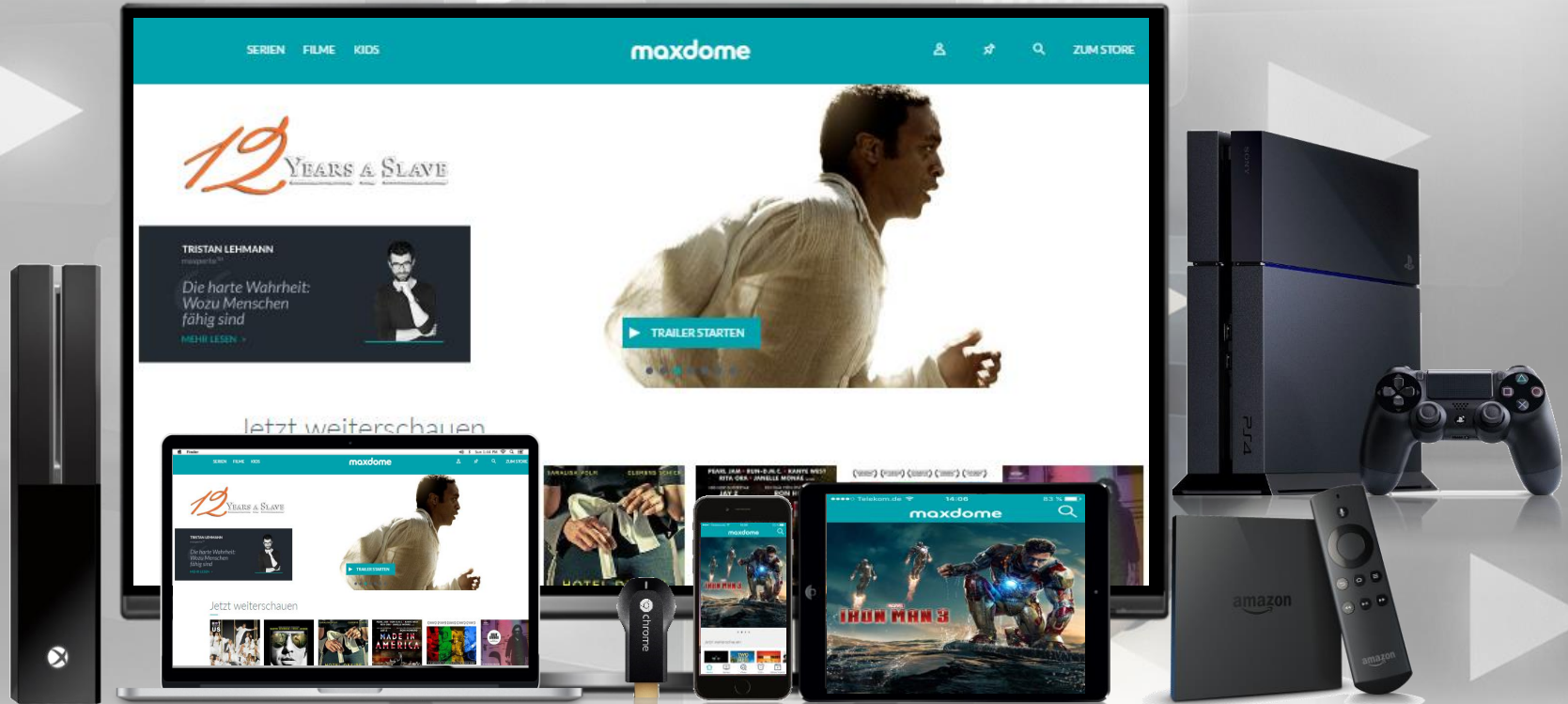
**Düstere Aussichten**

DominiK Drozdowski  
maxperte™

Lasst diesen Filmen in warten uns finstere Zeiten

MAXDOME MAKES FINDING THE RIGHT CONTENT EASY

# MAXDOME IS AVAILABLE FOR ALL DEVICE CATEGORIES



AND AVAILABLE ON NEARLY 100% OF **KEY OTT DEVICES**



**LG**



Microsoft

**PHILIPS**



**Panasonic**

**SONY**



unitymedia



**VESTEL**

PlayStation.

**amazon** fireTV



Deutsche  
Telekom



chromecast






# COMPETITORS WITH MULTIPLE SPEND VS MAXDOME

KPIs	maxdome	amazon prime video	NETFLIX
<b>Content spending</b> [per year] <sup>1)</sup>	1x	6x	7x
<b>Tech/Product spending</b> [per year] <sup>2)</sup>	1x	20x	50x
<b>Marketing GMV</b> [FY 2016e] <sup>3)</sup>	1x	0.75x	0.5x
<b>FTE Count</b> [FY 2016]	1x	4x	15x

1) Assessment for Germany: Subs Germany / Global Subs / Total Segment Cost 2) Estimates as per annual report (for Netflix, Amazon)  
3) Source: Nielsen FY 2016e; Excluding Sales Coops for maxdome & CRM reach for Amazon 4) as of September 2016

# MAXDOME IS AHEAD OF COMPETITION IN DISTRIBUTION

	Product & Tech	Content	Marketing	Distribution
	<p>Solid VOD product Curated recommendations &amp; user experience</p>	<p>25+ / Top 50 Series**, FTA Previews 1 Original Series Select Exclusives</p>	<p>Local Hero with leading share of voice</p>	<p>~100% OTT device coverage &amp; leading distribution partnerships e.g. Unity/DB</p>
	<p>Sophisticated UX, recommendation engine &amp; product features</p>	<p>30+ / Top 50 Series**, ~10 Top Original Series Several Exclusives</p>	<p>Global brand</p>	<p>Strong OTT distribution footprint &amp; Vodafone partnership</p>
	<p>Multi-product mix in typical Amazon layout/design, limited recommendations, subpar UX</p>	<p>20+ / Top 50 Series**, ~15 Original Series Few Exclusives</p>	<p>Marketed directly to Amazon base &amp; via Prime loyalty scheme</p>	<p>Bundled in Prime service, ability to leverage Kindle ecosystem (Fire TV)</p>

\*Share of Voice \*\*available as binge (all seasons, all episodes)

$$1 + 1 = 3$$

# TARIFF BUNDLES = GREAT CUSTOMER PROPOSITION



**ALL PREMIUM 3PLAY/TV TARIFFS  
INCLUDE MAXDOME SERVICE**

**NO ADDITIONAL BILLING  
INCLUDED IN TARIFF STRUCTURE**

**SEEMLESS USER EXPERIENCE  
MAXDOME INTERFACE EMBEDDED**

# UNIQUE CABLE DISTRIBUTION DEAL & PARTNERING CAPABILITIES

# maxdome



unitymedia



vodafone



Kabel Deutschland

pepcom



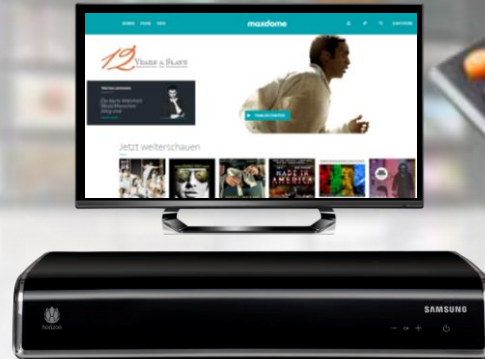
telecolumbus

primacom  
fernsehen · internet · telefon

17m  
HH

ALL-IN-ONE SET-TOP-BOX  
SOLUTION FOR LINEAR TV & SVOD

EXCLUSIVE & FULLY INTEGRATED  
SVOD SERVICE



# MOBILCOM LEVERAGES SALES FORCE TO UPSELL MAXDOME



**mobilcom  
debitel**

**SPECIAL CUSTOMER OFFER**

**BUNDLED WITH MOBILE TARIFFS**

**POS SERVICE AND SUPPORT**

**>500 POS STORES**

**MAXDOME - DIE BESTEN  
SERIEN UND FILME.**

- Zugriff auf über 50.000 Filme und Serien
- Jederzeit monatlich kündbar
- 3 Monate kostenlos und unverbindlich testen
- Ab dem 4. Monat nur € 7,99 monatlich

**maxdome**

**3 Monate  
GRATIS  
testen**

**testen  
GRATIS  
3 Monate**

# LEADING RETAILERS MARKET CUSTOMIZED VOUCHER CARDS



**PENNY. REWE**



**ROSSMANN**  
Mein Drogeriemarkt



**MAXDOME  
RETAIL  
STORES:  
>40k**



**MEDIA - SATURN**

# PLATFORM PARTNERSHIP WITH LIDL AS VOD PROVIDER



## VOLLES ENTERTAINMENT ZUM LIDL PREIS

Dein Zugang zu über 40 Millionen Songs  
und 50.000 Film- und Serientiteln

**DEEZER**

Gewinne jetzt ein Meet & Greet mit Robbie Williams

DEINE GANZE WELT DER MUSIK, HÖRBÜCHER & HÖRSPIELE

bei LIDL 30 Tage für nur **7.99** €

**MEHR ZU DEEZER**

**maxdome**

UNBEGRENZT maxdome

FILME UND SERIEN

bei LIDL 8 Monate für nur **6.99** €

**MEHR ZU MAXDOME**





# NEW: STRATEGIC PARTNERSHIP TEST WITH MEDIA-SATURN

**maxdome**

**DEINE FILM- UND SERIENFLAT MIT ÜBER 50.000 TITELN**

**NUR HIER IM MARKT: AB 4,99 €\***

\*Ab einer Laufzeit von 24 Monaten für die maxdome Film- und Serienflat für 4,99 € / Monat erhältlich. Weitere Informationen hier im Markt.

**maxdome**

**NEUER TV? VERDIENT BESTES ENTERTAINMENT**

**NUR HIER IM MARKT: AB 4,99 €\***

**TESTSIEGER**

\*Ab einer Laufzeit von 24 Monaten ist die maxdome Film- und Serienflat für 4,99 € / Monat erhältlich. Weitere Informationen hier im Markt.



MAXDOME CREATED FIRST OF ITS KIND **ON-TRAIN VOD** SOLUTION

# maxdome onboard



**BRING YOUR OWN DEVICE**

**STREAMING W/O INTERNET**

**LIVE IN APRIL 2017**

# CLOSED CIRCUIT STREAMING **W/O INTERNET** CONNECTIVITY



FREE



Closed Circuit;  
No Internet required



Train passenger  
uses own device



and logs in to  
DB WiFi.



ICE Portal opens as  
landing page of browser  
or  
enter maxdome.de



Customized  
maxdome onboard  
app opens (PC, iOSX,  
Android, iOS,  
Windows)



# UNIQUE EXTENSION OF MAXDOME'S SUBSCRIPTION MODEL

## FREE

Free for  
all ICE  
passengers



maxdome  
onboard

**50 Titles:**

Movies, Series, Docus,  
Shows, Kids

Ad enhanced  
free content section

## SUBSCRIPTION

Free for  
maxdome  
subscriber



maxdome  
onboard

**1000 Titles:**

100 Movies  
15 Binge Series

Included in maxdome's  
EUR 7.99 subscription  
(no additional charge)

## TRANSACTIONAL

Trans-  
actional  
rentals



maxdome  
onboard

**25 Movies:**

Movies from €2.99

"Fresh from Cinema"  
movies for 48h rental



# MAXDOME IS WELL EMBEDDED INTO P7S1 STRATEGY

CONTENT LICENSING COST SYNERGIES

ACCESS TO MASS REACH TV-AD SPACE

LEVERAGE LOCAL NETWORK & RELATIONS

ABILITY TO ADJUST TO PARTNER NEEDS

RELEVANT ROLE IN PAY VOD MARKET



# MAXDOME'S LOCAL HERO APPROACH ADAPTABLE FOR OTHERS

## NETFLIX



ONE GLOBAL STRATEGY &  
ONE APPROACH FOR  
EVERY MARKET

## maxdome



WE PARTNER WITH LOCALS TO PROVIDE A  
UNIQUE & CUSTOMIZED APPROACH



A young child in a colorful striped shirt and blue jeans stands on a small white step ladder, drawing a large white outline of a rocket ship on a grey concrete wall. A small black dog sits on the ground to the left of the ladder, watching the child. A blue bucket and some colorful chalk are on the ground to the right. The scene is set outdoors on a paved surface with some fallen leaves.

# maxdome

Entertainment for you