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TV Spielfilm Live
Digital TV Guide 2.0

veed snapshot

July 2015

Burda launches the Linear TV OTT service "TV Spielfilm live" as an extension of its existing EPG service.
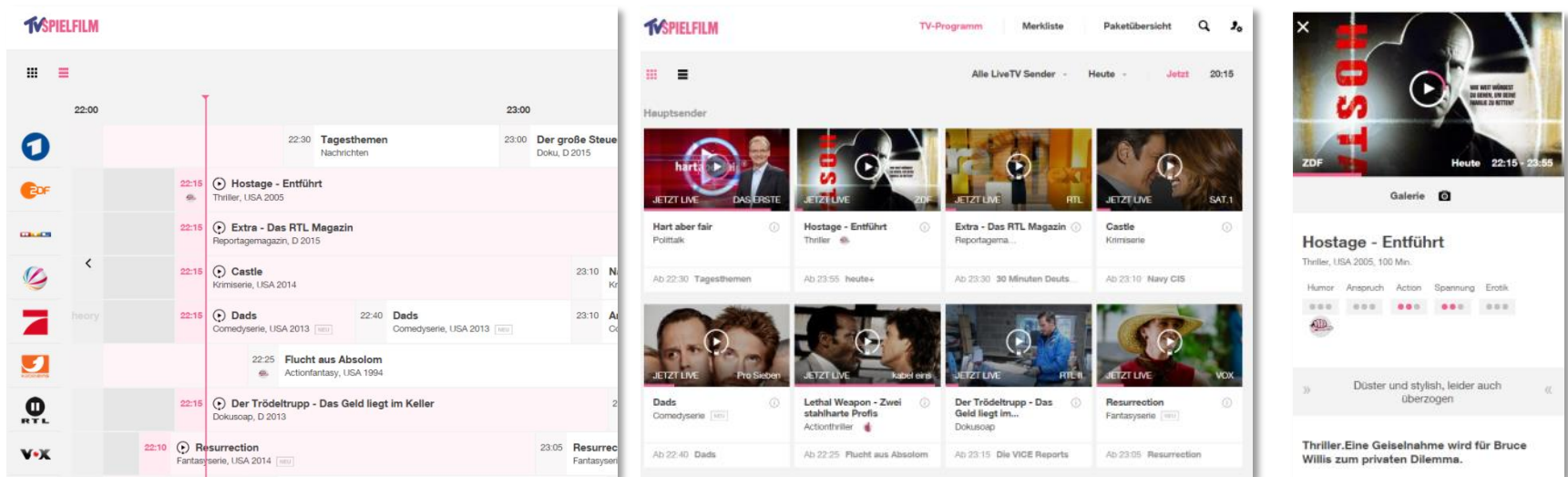
Strategic Rationale

- Burda launches a Linear TV extension for its leading German journalistic TV program guide, TV Spielfilm, taking into account: changing reception behaviors of today's TV viewers and the growing market for OTT services

- The streaming service is to combine access to Live TV with program reviews and recommendations, as well as a social media connection to push content exchange. Thus, a larger reach of consumer groups throughout all devices can be gained and promoted to advertisers

- The subscription price point for the premium tier of €9.99 per month is higher than the 6,99€ of its direct competitor MagineTV but similar to Zattoo. TV Spielfilm claims a competitive advantage through its established Electronic Program Guide (EPG) and its high journalistic quality while already having a vast digital reach

Offer Details

- **Proposition:** Access Live TV content directly from TV Spielfilm's EPG.

- **Packaging:** A freemium subscription model provides access to over 30 channels (incl. public channels) for free; full, ad-free access is available for €9.99 per month (one free trial month).*

- **Content:** 59 SD channels (RTL group and P7S1 group included) and 29 HD channels for WiFi and mobile consumption.*

- **Devices:** Service available online (browser based), on iOS (coming soon) and Android tablets and smartphones, Airplay and Chromecast.

- **Development:** Developed in cooperation with and hosted by Zattoo.

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*Duplicates and regional variants of channels are only considered as one channel
source: veed analytics

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Walkthrough: instant access via EPG grid view and linkage of metadata.

- To access the TV Spielfilm Live TV service users have to create a basic user profile (name, e-mail address and password); the service is not yet deep linked into the basic TV Spielfilm online offering.
- After registration users can use either the EPG grid (known from other providers like Zattoo or Magine) or the list view to access content.
- After selection of a live asset, describing metadata like genre, production, year, rating, synopsis are shown to the user.
- Users can be linked to social networks to like and share the selected asset and put it on their watchlist.
- Catch-up content is not yet available.

Proposition structure: Freemium to maximize reach and profit.

TV Spielfilm live packages*

0,00€ 9,99€

59/29 SD/HD (Premium)

36/0 SD/HD (Free)

Free | **Premium**

Channel Selection (Free)
- General (5 SD)
- Publ. 3rd channels (9 SD)
- Special Interest (15 SD)
- Sport (1 SD)
- News/ Docu. (3 SD)
- Kids (2 SD)
- Music (1 SD)

Channel Selection (Premium)
- General (18/5 SD/HD)
- Publ. 3rd channels (9/8 SD/HD)
- Special Interest (18/9 SD/HD)
- Sport (2/1 SD/HD)
- News/ Docu. (5/1 SD/HD)
- Kids (3/2 SD/HD)
- Music (4/3 SD/HD)

Free: The basic offer
- Free access to 36 SD channels*
- Editorial recommendations and additional information
- Available on all supported devices
- Supported by advertising

▶ Free offer increases reach and direct network effects (e.g. ratings, etc.) and is partially cross subsidized by advertising
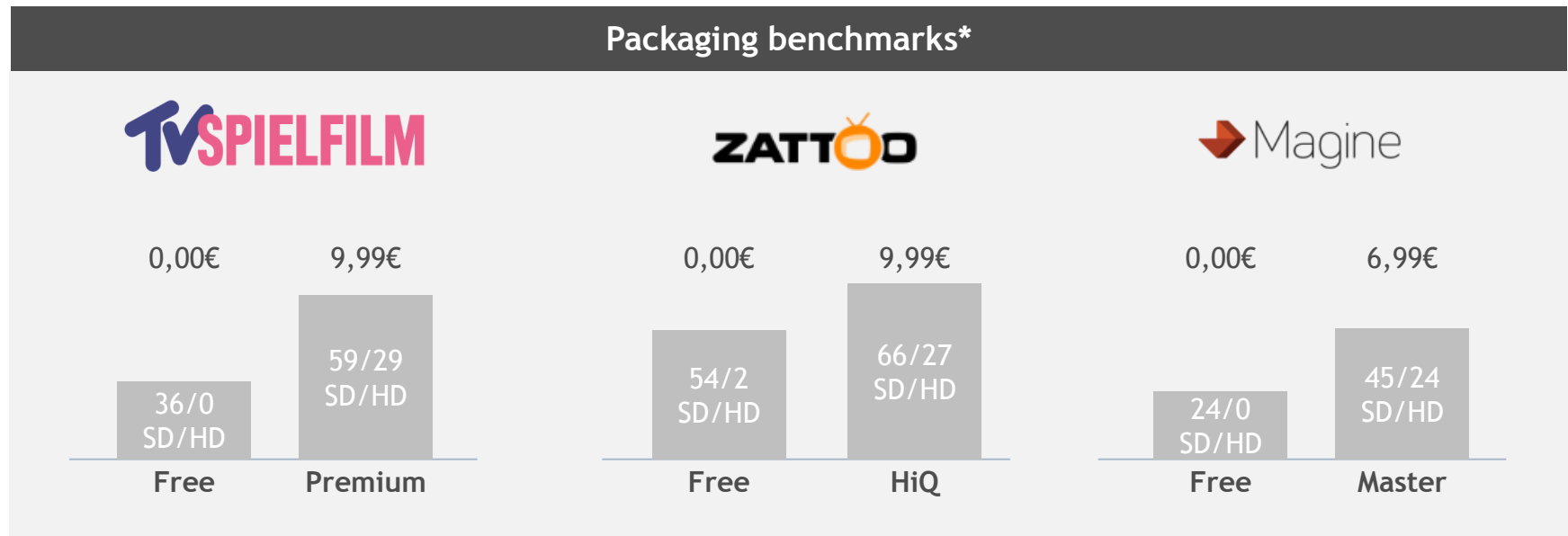
Premium: Free offer enriched by
- 23 add. channels, including channels provided by private broadcasters ProSiebenSat1 and RTL*
- Access to 29 channels in HD quality*
- No advertising
- Termination on a monthly basis

▶ HD established as central driver for upgrade to premium package

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Competition: TV Spielfilm may become the third big player in the field of linear OTT providers.

Packaging benchmarks*

TVSPIELFILM

0,00€	9,99€
36/0 SD/HD	59/29 SD/HD
Free	**Premium**

ZATTOO

0,00€	9,99€
54/2 SD/HD	66/27 SD/HD
Free	**HiQ**

Magine

0,00€	6,99€
24/0 SD/HD	45/24 SD/HD
Free	**Master**

Status - Highlights

! Zattoo offers the strongest freemium product with a large selection of channels and already 2 HD channels

! TV Spielfilm enters the market with a well selected Premium Package, including 59 SD channels and 29 HD channels

! TV Spielfilm provides the strongest HD offering compered with Zattoo and Magine

*Duplicates and regional variants of channels are only considered as one channel
For Zattoo and Magine equivalent packages has been selected from their portfolio
source: veed analytics

Putting Burda's move into context and what it implies for other content providers from increasingly varying industries.

- The market for OTT services is constantly growing:
  - Most major operators in the US and Europe have already launched a dedicated service as an extension of their TV packages. The main operator in Germany (DTAG, Unitmedia or KDG) extended their offering
  - A growing base of broadcasters launched OTT services to distribute their content directly to customers, as ProSiebenSat1 in Germany (*7TV*), or HBO in the US (*HBO Now*)
  - Publishers started dealing with changing consumer reception behaviors by expanding their digital offers and transform them into digital entertainment platforms – one example is Bild now providing access to live TV on all devices via Magine TV
- Burda is following the same approach with TV Spielfilm live by making use of its large user base and reputation as a TV program expert, which grows expectations of other content providers following soon with similar concepts
- By putting one of their core products into a digital environment, Burda shows how classical media companies can enforce their digital transformation

We are constantly analyzing video industry trends and developments.

If you would like to **discuss** the impact of broadcasters OTT services **on your business and understand the competitive positioning of TV Spielfilm**, please get in touch with:

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About veed: Benefit from our reports, workshops in our NewTV Experience Center and research.

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▶ **veed reports**

- Strategic evaluation of linear and on demand services
- Periodical analysis of HD channels per linear service
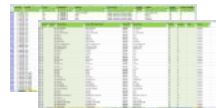- Periodical analysis of SVoD content offerings

▶ **veed workshops**

- Hands-on testing of leading video services in our unique NewTV Experience Center
- Comprehensive overview of the international video market structured in veed academy curriculum
- Qualitative insights and evaluation of market developments through veed experts

▶ **bespoke Research**

- Conduction of customer tailored research
- Analysis of publicly available or internal customer data
- Creation of full reports and management papers tailored to specific customer needs

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