

## HbbTV Country Review

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# HbbTV Deployments



## IN OPERATION

- Australia
- Austria
- Bosnia/Herzegovina
- Czech Republic
- Denmark
- Estonia
- Finland
- France
- Germany
- Hungary
- Luxembourg
- Mauritius
- Namibia
- Netherlands
- New Zealand
- Poland
- Saudi Arabia
- Senegal
- Singapore
- Slovakia
- Spain

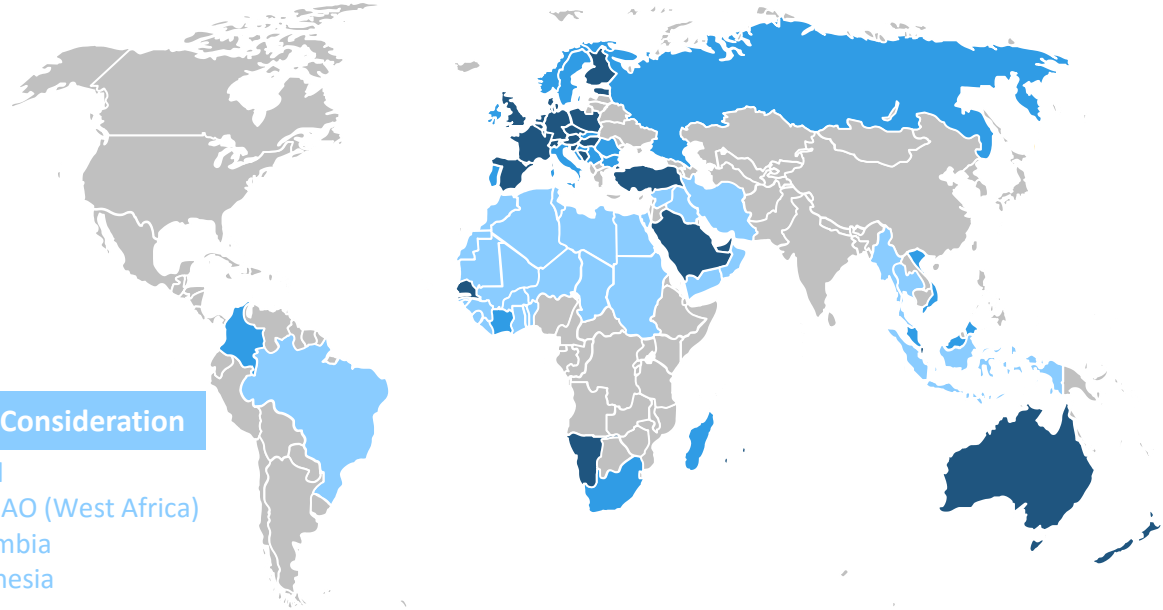
- Switzerland
- Turkey
- UAE
- UK

## Announced / Trial

- Bulgaria
- Croatia
- Gambia
- Ireland
- Italy
- Ivory Coast
- Madagascar
- Malaysia
- Norway
- Romania
- Russia
- Serbia
- Slovenia
- South Africa
- Sweden
- Vietnam

## Under Consideration

- Brazil
- CEDEAO (West Africa)
- Columbia
- Indonesia
- Iran
- Middle East countries
- Myanmar
- Portugal
- Sumatra
- Thailand

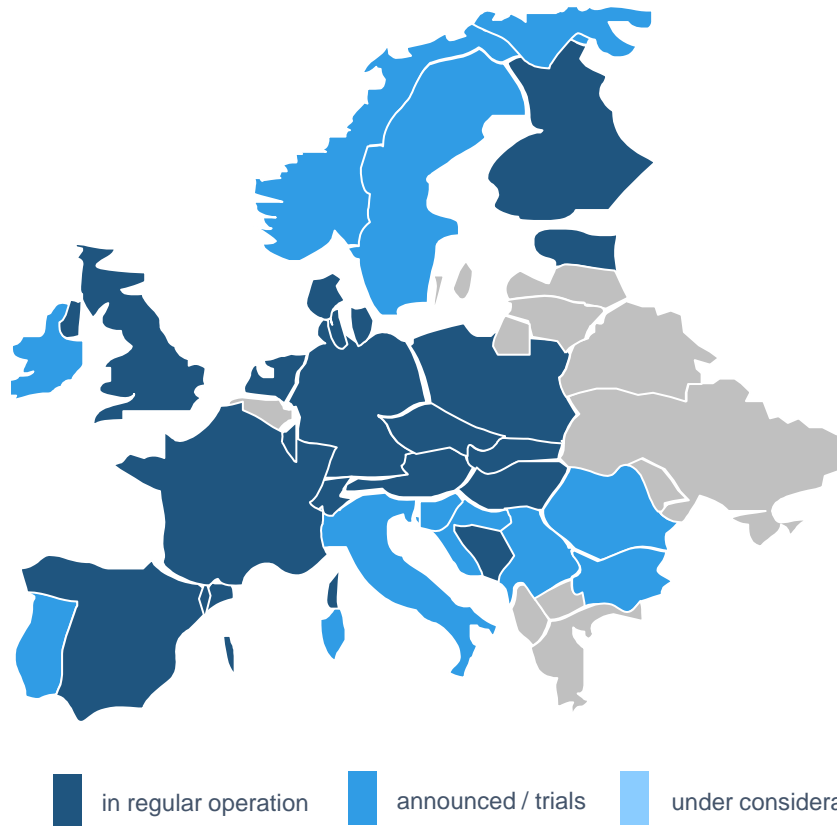


- **25 DEPLOYED COUNTRIES**
- **43 MILLIONS DEPLOYED TVS \***
- **HUNDREDS DEPLOYED SERVICES**

\* Source



# HbbTV deployments in Europe

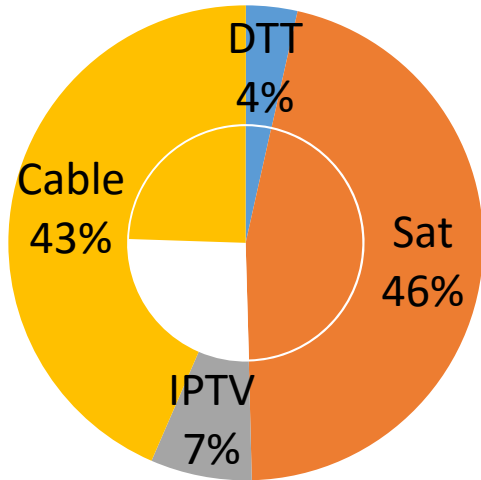




# Germany



38 M TV Households



HbbTV Market Reach  
Over 70%

Source: Courtesy dataxis

Smart-TV share  
2015



60%

HbbTV devices share  
2015



93%

Source Content: (03/2016)



Total HbbTV devices  
vs all connected devices



18,8 Mio

Source Graphics:





# Germany

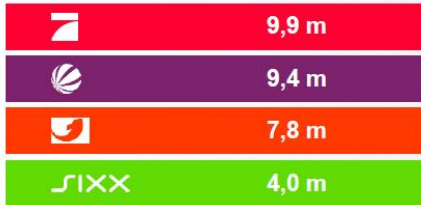


Ø 2,6 persons per HH\*

Devices (Unique Devices)

# 9,9 m

Connected TVs / month



## Audience potential in HH

# 26 m

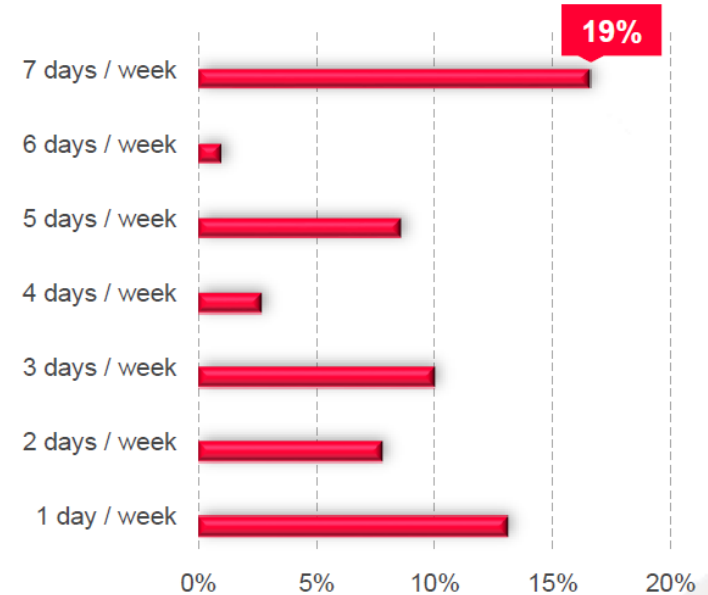
persons per HH x number HH



### 62% use the Red Button at least once per week

## Utilization intensity HbbTV platform

Information in %

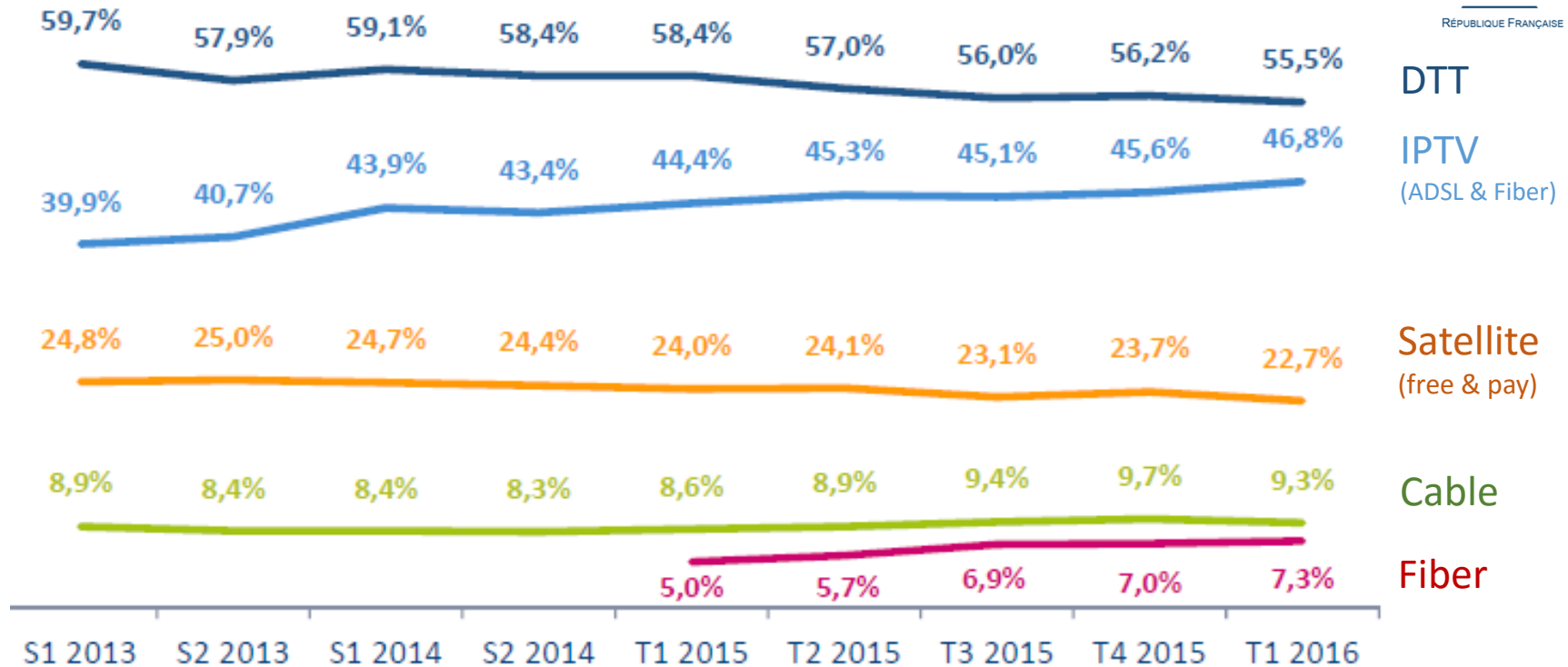


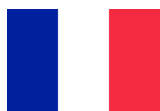
Source: SevenOne Media (New Media Research), July 2016  
\*Base: Users HbbTV Plattform, July 2016

Source: SevenOne Media

## TV reception modes

Source:   
 CONSEIL SUPÉRIEUR DE L'AUDIOVISUEL  
 RÉPUBLIQUE FRANÇAISE

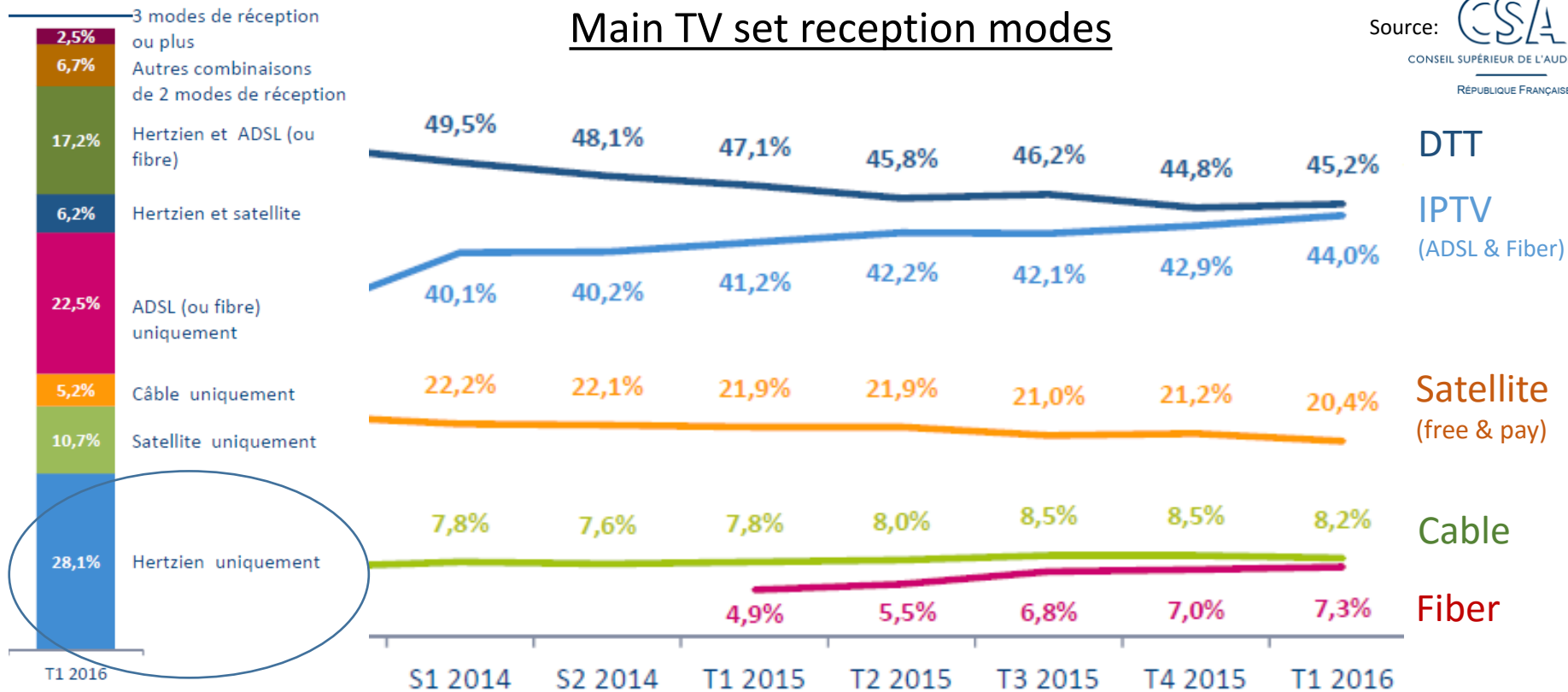




# France

Source: **CONSEIL SUPÉRIEUR DE L'AUDIOVISUEL**  
RÉPUBLIQUE FRANÇAISE

## Main TV set reception modes



French consumers get IPTV almost for free due to strong fixed line competition

**RED** BY SFR

RED BOX FIBRE

TESTER MON ÉLIGIBILITÉ

Internet avec un débit jusqu'à 100 Mb/s avec box incluse sans surcout

Appels illimités vers les fixes en France et vers plus de 100 destinations

EN OPTION SANS ENGAGEMENT +2€

**Télévision HD**  
26 chaînes TV TNT, replay et bouquets en option

**9€99** /MOIS  
au lieu de 19.99€

TESTER MON ÉLIGIBILITÉ

Besoin d'aide pour commander ?  
Contactez nos Experts RED!

bouygues

Forfaits mobile | Téléphones | Internet | Bons Plans | Assistance | Pro/Entreprises

Rechercher | Magasins | Panier | Mon compte

**Bbox : Offres Internet + TV + Téléphonie**

Le meilleur de la technologie

NOUVELLE **Bbox Miami**  
INTERNET - TV - TÉLÉPHONIE - APPLIS

Jusqu'au 23/10

Prix anniversaire  
**14€99** /mois  
pendant 12 mois puis 26<sup>mois</sup>

Disponible en  
**FIBRE** **VDSL** **ADSL**

Tester votre logement

Découvrir la Bbox Miami

LES 3 PREMIERS MOIS OFFERTS\*\*  
OFFRE SPÉCIALE BOUYGUES TELECOM

Découvrir l'offre

Internet Très Haut Débit jusqu'à 1 Gb/s

Appels illimités vers les fixes et mobiles

+ de 170 chaînes en direct, à la carte ou à la demande

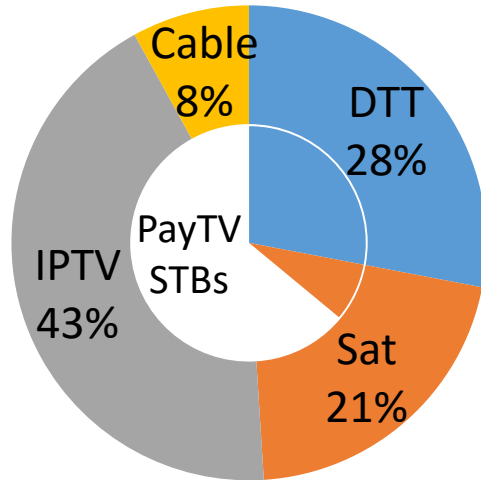
Accès au Google Play™ et ses applis TV

LES 3 PREMIERS MOIS OFFERTS\*\*

BOUYGUES CANAL+ CANALSAT PANORAMA

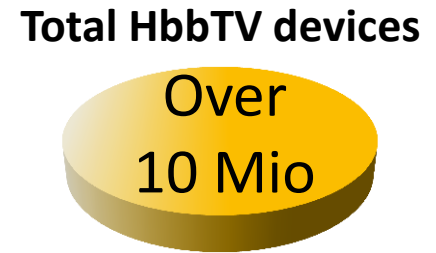
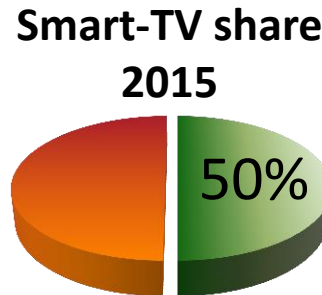


28M TV Households




HbbTV Market Reach  
36%

- France Télévision has decided to focus on Pay TV platforms
  - They have stopped their HbbTV services



- B2B & B2C communication is needed to take advantage of the HbbTV platform

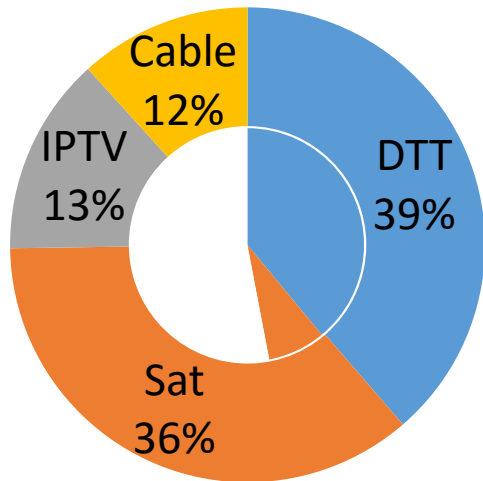
Source: Courtesy  dataxis



# United Kingdom



27 M TV Households



HbbTV Market Reach  
Around 50%

DTT used in 73% Households

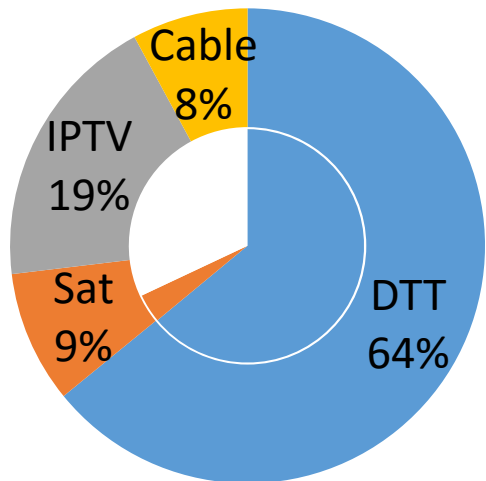
- Freeview Play “based on HbbTV 2” deployed in 2015 on TV and STBs
- HbbTV services: leading catch-up services from BBC, ITV, Channel 4 & 5
- BBC June 2016 announcement to accelerate HbbTV wide adoption
  - Drop MHEG requirement
  - Target for HbbTV 2.0.1 TVs in 2018
  - Collaboration with Freeview, Digital UK and DTG
- FreeSat has deployed “HbbTV like” OpApps services

Source: Courtesy dataxis



# Spain

18 M TV Households



HbbTV Market Reach  
Around 70%

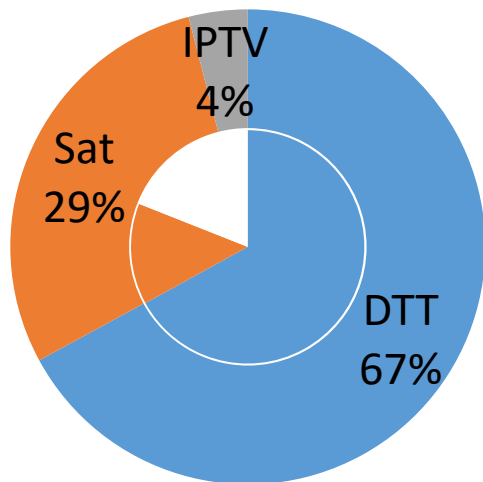
DTT used in 79% Households

- tdt Hibrida certification
  - based on HbbTV 1.5
  - updating to HbbTV 2.0.1
- Cellnex (DTT Network Operator): Official Certification Provider
- 1M HbbTV TV sold in 2015
- Total HbbTV TVs to date: 4,5M
  - 86% HbbTV 1.5
- 16 HbbTV channels
- Private Networks 57,5% share
  - Considering deploying HbbTV services



Source: Courtesy dataxis

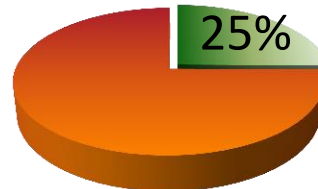
25 M TV Households



Potential Market Reach  
For HbbTV: Over 80%

Source: Courtesy  dataxis

Smart-TV share  
2015



Total Connectable  
MHP devices



Total Smart TV  
deployed

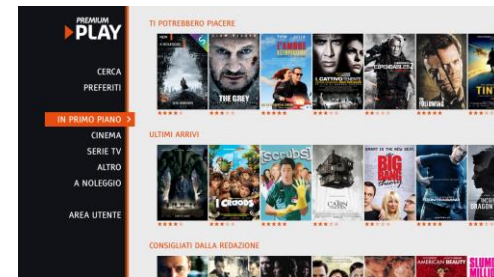


Total tivùon!  
devices



- **tivùon!** certified devices with MHP & Marlin DRM

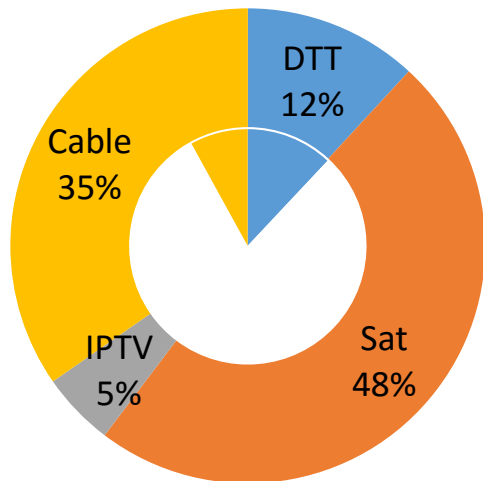
- Many catch-up services deployed with MHP
- Pay VOD services as well
  - Italy as more expertise in that field than most HbbTV deployed countries
- MHP OppAp services deployed in June 2016
- Italy has endorsed HbbTV 2.0.1 with the goal to deploy it in 2017
  - Mediaset has already broadcasted HbbTV applications to demonstrate that HbbTV signaling do not interfere with the MHP legacy





# Poland

13 M TV Households



HbbTV Market Reach  
Around 20%

Source: Courtesy dataxis

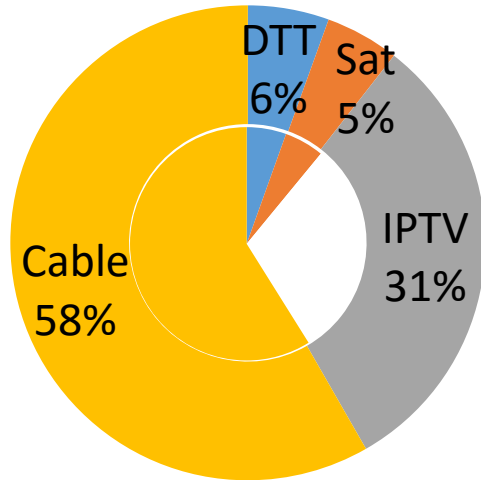
- Complicated year for Public Broadcaster due to political situation
- Status quo for HbbTV Broadcasters
  - All TV channels from TVP
  - TV channels from ZPR Group (8TV, Eska TV, Polo TV, Fokus TV, Music Vox TV)
  - Stopklatka TV
  - TVS
- New DTT multiplex in 2017 with more HbbTV services.
- Estimate of 1.8M connected HbbTV TVs



# The Netherlands



17M Households



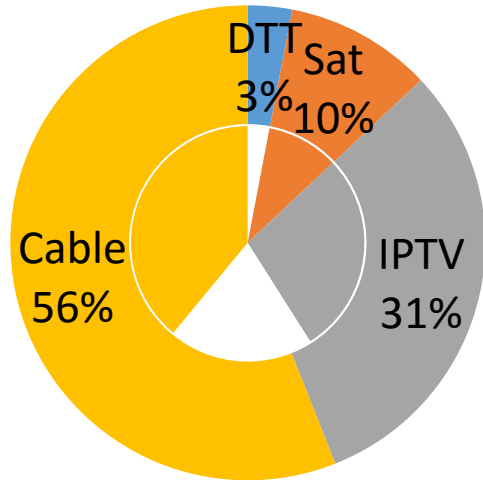
HbbTV Market Reach  
70%

- Cable Operators are now carrying HbbTV services
- But over 90% of households are watching TV through proprietary STBs
- Estimation of around 10M HbbTV deployed
- B2B & B2C communication is needed to take advantage of the HbbTV platform

Source: Courtesy dataxis



3.3M TV Households



HbbTV Market Reach  
Around 80%

Source: Courtesy dataxis

- Cable operators carry the HbbTV services
  - They provide their also their own HbbTV services
- HbbTV over IPTV with Swisscom
  - HbbTV built-in Android STB
- 2.5M HbbTV devices

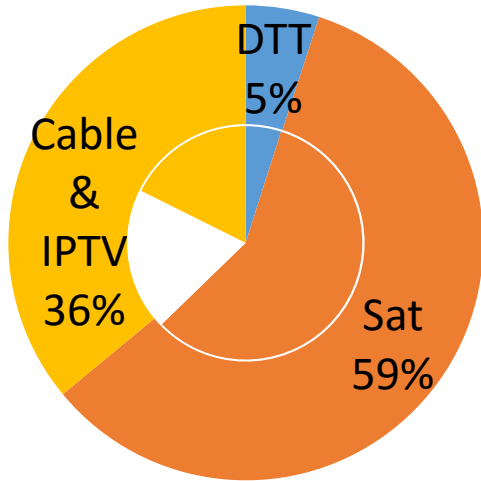




# Austria



3.6M Households



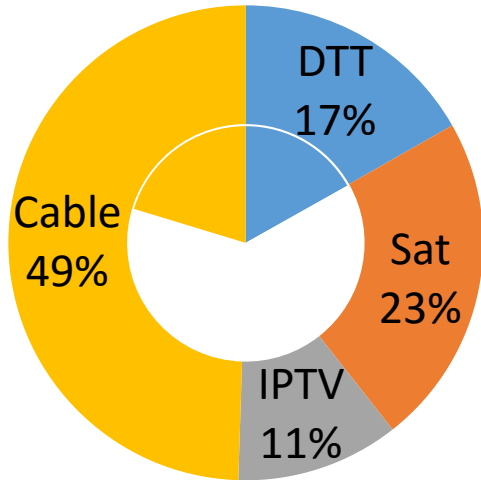
HbbTV Market Reach  
80%

Source: Courtesy dataxis

- In June 2016 ORF launched a "Start Over" service using HbbTV 1.5 with MPEG-DASH



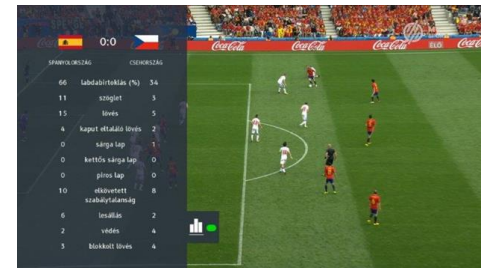
## 4.2M Households



## HbbTV Market Reach 40%

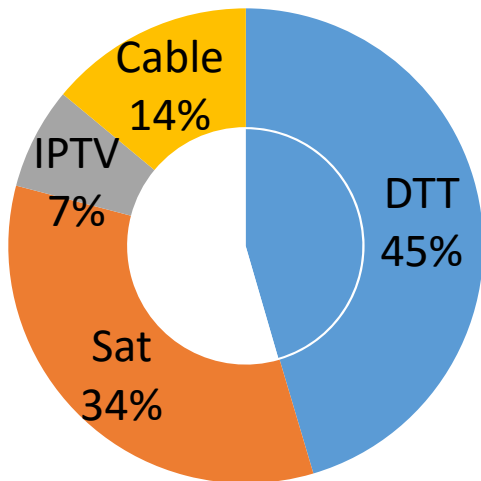
Source: Courtesy dataxis

- 550K Active HbbTV TVs
  - From 200K last year
- New / improve services
  - Mindig Portal facelift with more content
  - Cross channel links
  - Sport Statistics
  - Voting
- Looking for tools to improve Consumer communication





4.5M Households

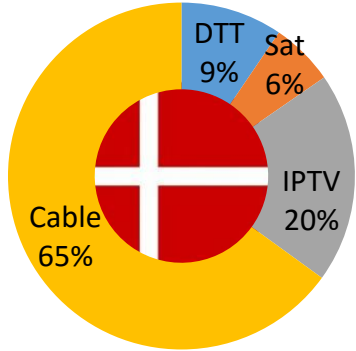


- Nielsen Admosphere study for Ceske Radiokomunikace, June 2016

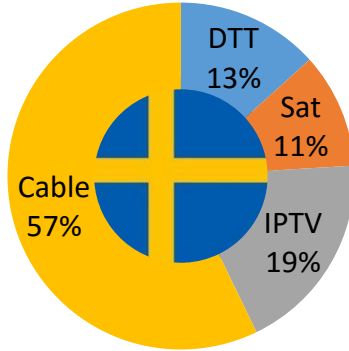
- SmartTV in 30% Czech househlods
- HbbTV services accessed by 36% of these homes
- Most beneficial feature was accessing archive programmes (76%), followed by catch-up or time shift (61%).
- when asked if and how they would be willing to pay for premium content
  - 22% via ad tracking
  - 21% for a monthly fee
  - 21% for a one-time fee
  - 35% not interested in viewing premium content

Source: Courtesy dataxis

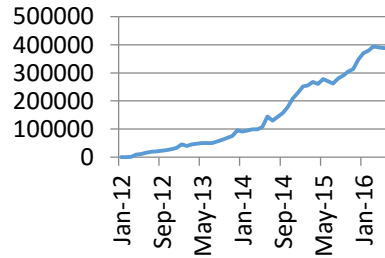
2.5M HH



4.2M HH



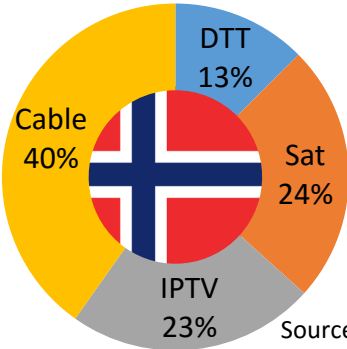
**Danish Radio:  
Unique users**



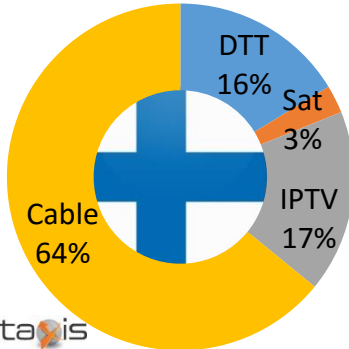
NorDig Unified IRD spec:

- Scandinavia & Ireland
- HbbTV 1.5
- HbbTV 2.0.1 spec > dec.16

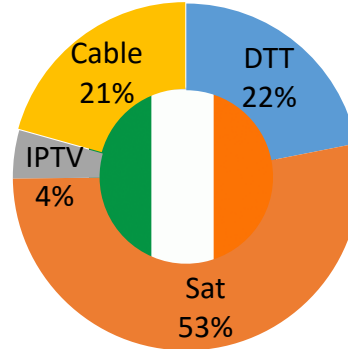
2.2M HH



2.4M HH



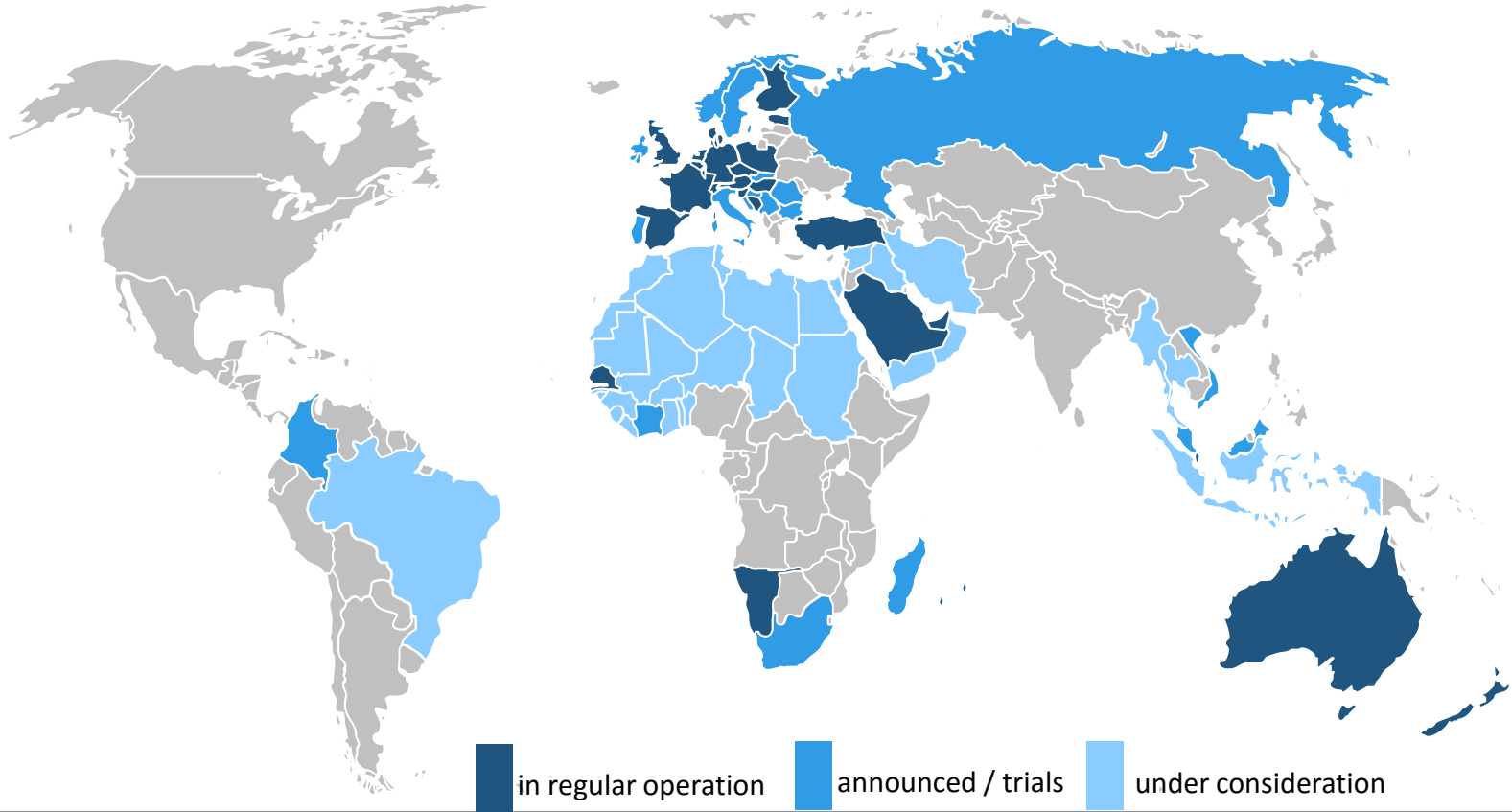
1.7M HH



Source: dataxis

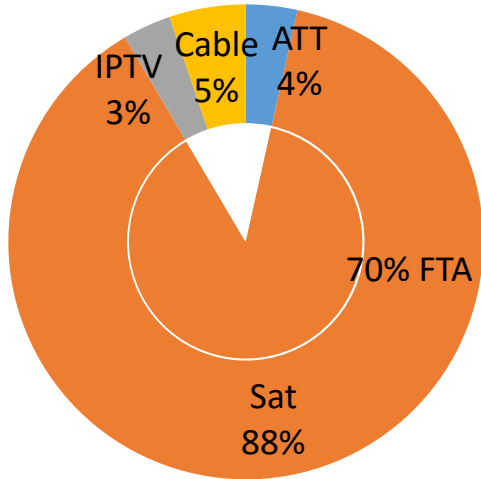


# Rest of the world





22 M Households



HbbTV Market Reach  
Over 88%

Source: Courtesy datais

- Terrestrial TV is still analog
- DVB-T2 would be based on Nordig Spec
  - HbbTV 1.5
  - No certification
- HbbTV Services
  - TRT ARTI, available on satellite
  - Works ok in most of HbbTV 1.1 TVs
- HbbTV devices in satellite reception
  - 500.000 regular HbbTV devices
  - 20% of Turkish people living outside Turkey



# Middle East

- Deployed in Middle East with Selelevision
  - Satellite Pay TV platform (ArabSat)
  - Mainly Saudi Arabia and United Arab Emirates
- 200K HbbTV STB deployed
  - Mixing Android and HbbTV
- Deployed HbbTV services
  - BBC News Arabic
  - DW Arabic
  - Rotana
  - MBC
  - Citrus TV (TV shopping)
  - Al Arabiya





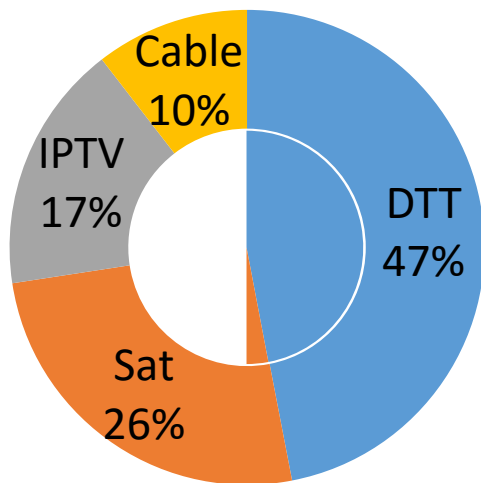
# Africa

- Slower to deploy than expected
  - South Africa is still based on MHEG5
  - Nigeria is deploying a proprietary solution for their DTT
  - Senegal and Namibia have deployed HbbTV STBs but no services
  - Ivory Coast has postponed their DTT switchover by a year
- For most African countries Analog Switch Off is not expected to happen before 2020 (instead of 2015)





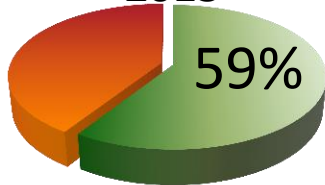
9M Households



HbbTV Market Reach  
50%

Source: Courtesy dataxis

Smart-TV share  
2015



Total HbbTV devices



Connected  
HbbTV devices

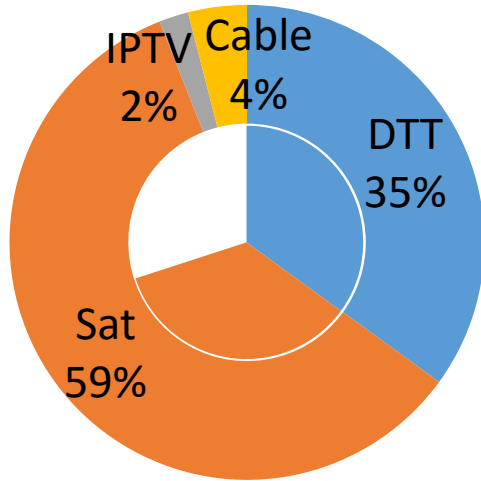


- Freeview plus Certification
  - HbbTV 1.5 spec with DRM
- Freeview Plus “Standard OpApp”
  - 6 x HbbTV services (5 x broadcasters + FV+)
- FreeviewPlus brand
  - 56% brand awareness
  - 88% brand understanding





1.6M TV Households



HbbTV Market Reach  
70%

Source: Courtesy dataxis

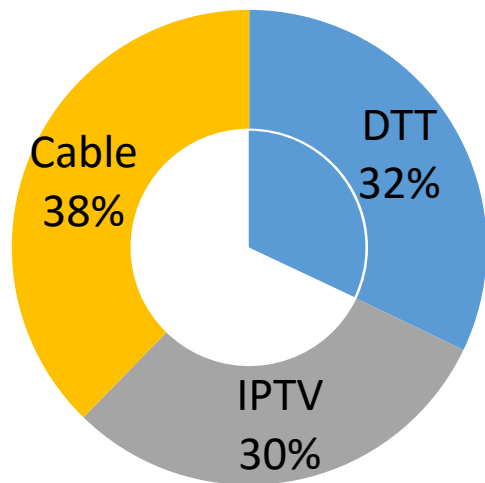
- Freeview plus Certification
  - HbbTV 1.5 spec with DRM
- Freeview Plus “Standard OpApp”
  - Catch-up on 6 channels
  - VOD on 12 channels
  - VOD catalogue of over 10,000 shows
- Around 200K active HbbTV homes





# Singapore

1.4M TV Households

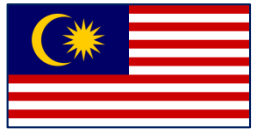


HbbTV Market Reach  
32%

Source: Courtesy dataxis



- HbbTV Services deployed in 2016
  - Full Toggle OTT catalogue via HbbTV (Toggle Red Button)
  - Catch up TV, premium & Toggle Original content
  - Integrated linear EPG & VoD program catalogue to create a seamless experience
  - Including integrated linear & VoD content offerings on programme pages
  - Linear channel streaming (free & premium)
  - Plans for startover, interactive advertising & transactions
- Dynamic Marketing campaign



- Malaysia: Field trials
  - deployment postponed for over 2 years



- Vietnam: Field trials



- Indonesia: Under consideration



- Thailand: Under consideration

Thank you to local HbbTV contacts for their help:

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Éva Kovács, Klaus Merkel, Angelo Pettazzi, Liz Ross,  
Martin Spycher, Pawel Tutka...

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