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: GFK
HbbTV deployments in Europe

- In regular operation
- Announced / Trials
- Under consideration
Germany

38 M TV Households

- DTT: 4%
- Cable: 43%
- Sat: 46%
- IPTV: 7%

HbbTV Market Reach Over 70%

Smart-TV share
2015
- 4,2 Mio
- 60%

HbbTV devices share
2015
- 3,9 Mio
- 93%

Total HbbTV devices
vs all connected devices
- 18,8 Mio
- 74%

Source: Courtesy dataxis
Source Content: (03/2016)
Source Graphics: DEUTSCHE TV-PLATTFORM
Germany

Devices (Unique Devices)

9,9 m
Connected TVs / month

26 m
Audience potential in HH
persons per HH x number HH

62% use the Red Button at least once per week

Utilization intensity HbbTV platform
Information in %

7 days / week 19%
6 days / week
5 days / week
4 days / week
3 days / week
2 days / week
1 day / week

Source: SevenOne Media (New Media Research), July 2016
*Base: Users HbbTV Platform, July 2016
France

TV reception modes

Source: CSA

DTT
(IPTV (ADSL & Fiber))

Satellite
(free & pay)

Cable

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

28M TV Households

- Cable 8%
- DTT 28%
- IPTV 43%
- PayTV STBs
- Sat 21%

HbbTV Market Reach 36%

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

Smart-TV share 2015

- Over 10 Mio
- Total HbbTV devices

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

Source: Courtesy dataxis
United Kingdom

27 M TV Households

- DTT 39%
- Sat 36%
- IPTV 13%
- Cable 12%

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

- 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

HbbTV Market Reach
Around 70%

DTT used in 79% Households

Source: Courtesy dataapis
Italia

25 M TV Households

- DTT: 67%
- Sat: 29%
- IPTV: 4%

Potential Market Reach
For HbbTV: Over 80%

Source: Courtesy dataxis

- Smart-TV share 2015: 25%
- Total Connectable MHP devices: 4.2 Mio
- Total Smart TV deployed: 5.7 Mio
- Total tivùon! devices: 1.6 Mio

• 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

- 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

HbbTV Market Reach
Around 20%

Source: Courtesy of data vis

DTT 12%
Cable 35%
IPTV 5%
Sat 48%
The Netherlands

- 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

17M Households

- Cable 58%
- IPTV 31%
- DTT 6%
- Sat 5%

HbbTV Market Reach 70%

Source: Courtesy of 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

HbbTV Market Reach
Around 80%

Source: Courtesy dataxis
Austria

3.6M Households

HbbTV Market Reach 80%

- In June 2016 ORF launched a “Start Over” service using HbbTV 1.5 with MPEG-DASH
• 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
Czech Republik

4.5M Households

- Nielsen Admosphere study for Ceske Radiokomunikace, June 2016
  - SmartTV in 30% Czech households
  - 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 datavis
Nordig Region

NorDig Unified IRD spec:
- Scandinavia & Ireland
- HbbTV 1.5
- HbbTV 2.0.1 spec > dec.16

Source: dataxis
Rest of the world
Turkey

22 M Households

- 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

HbbTV Market Reach
Over 88%

Source: Courtesy of dataxis
Middle East

- Deployed in Middle East with Selevision
  - 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)
• 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
New Zealand

1.6M TV Households

- **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**

HbbTV Market Reach
70%

Source: Courtesy of datamix
Singapore

1.4M TV Households

- Cable 38%
- DTT 32%
- IPTV 30%

HbbTV Market Reach 32%

- 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

Source: Courtesy
Other Asia Pacific

- 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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