

The logo for HbbTV, featuring the letters 'HbbTV' in a grey sans-serif font. Above the 'b's are four colored dots: red, green, yellow, and blue.

HbbTV Country Review “Rest of the World”

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HbbTV Symposium 2017 Rome, 17th & 18th October 2017



HbbTV Country Review

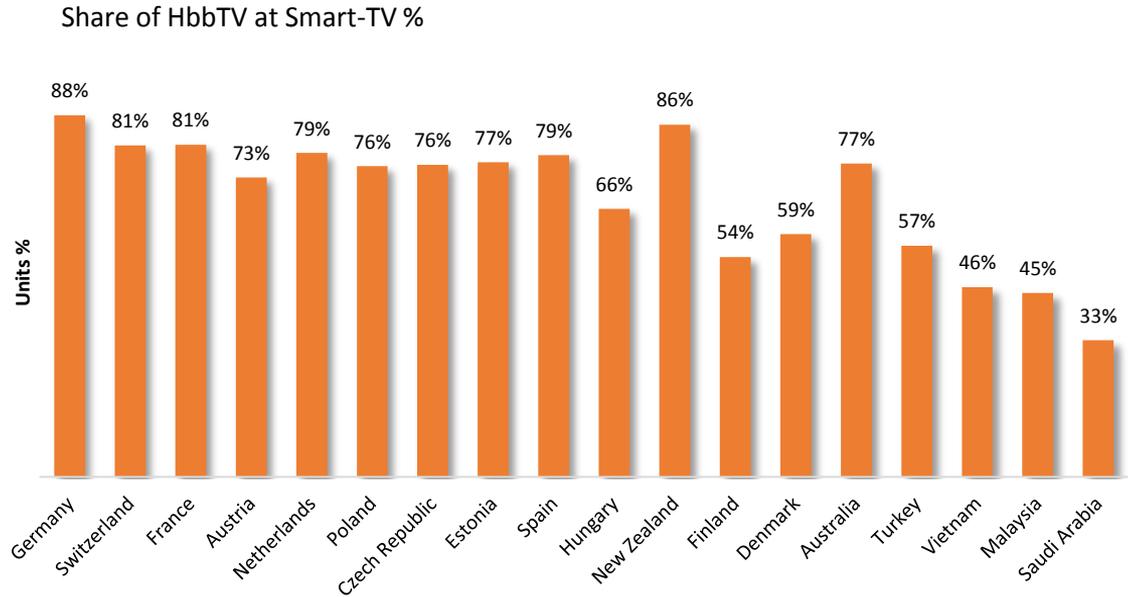
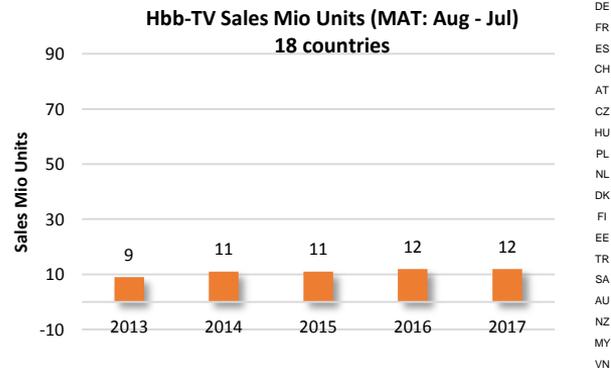
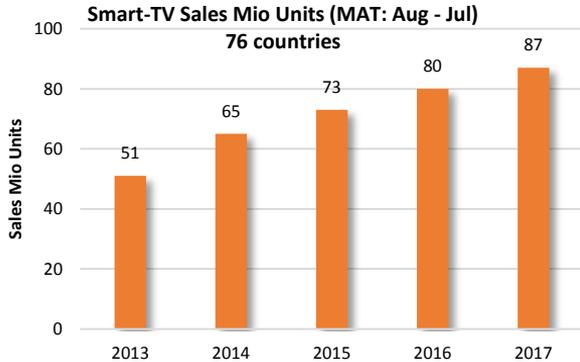


Note: Best estimates based on country information included in this presentation

HbbTV Country Review



Smart TV / HbbTV Global Sales (w.o. North America)



Source: GfK POS Measurement



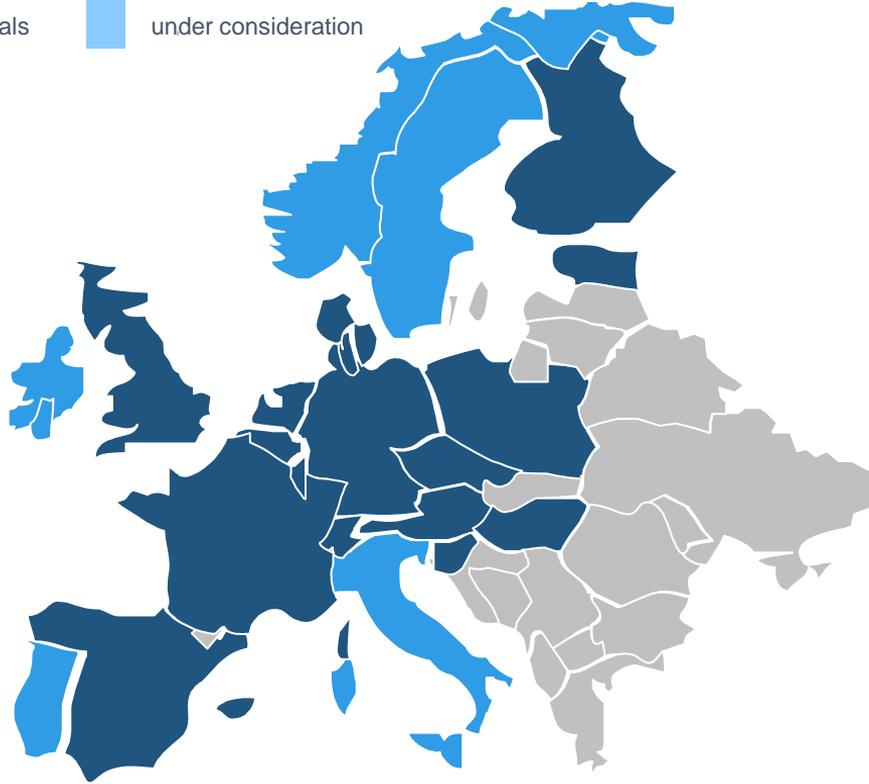
HbbTV Deployments in Europe 2016



 in regular operation

 announced / trials

 under consideration

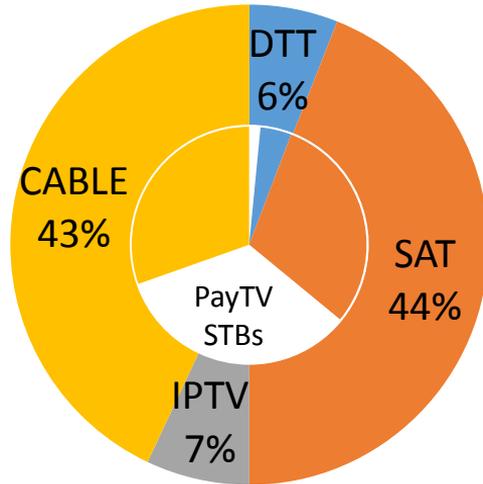




Germany



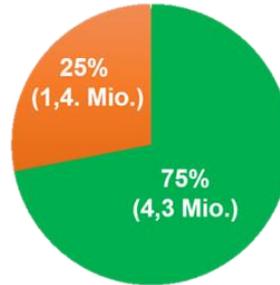
38 Mln TV-Households



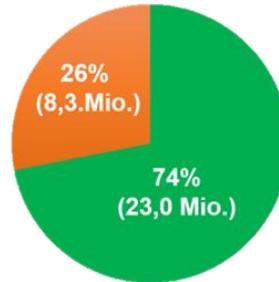
Source: dataxis

HbbTV Market Reach 74% (GfK)

Smart-TV Equipment 2016 Sales



Smart-TV Equipment 2004-2016 Sales



Source: GfK Retail&Technology 02/2017

- HD/UHD status*:
 - 59% HD viewers
 - 6 chs UHD via Astra
 - target 2017: 5.5 Mln UHD – TV sets
- Pay-TV growing by 5% per annum
- 60% of the Smart-TV HH are using catchup-services often or very often (followed by VOD: 56% and Youtube: 54%)*
- Red Button gaining relevance: 45% of all connected users are aware of Red Button offerings***

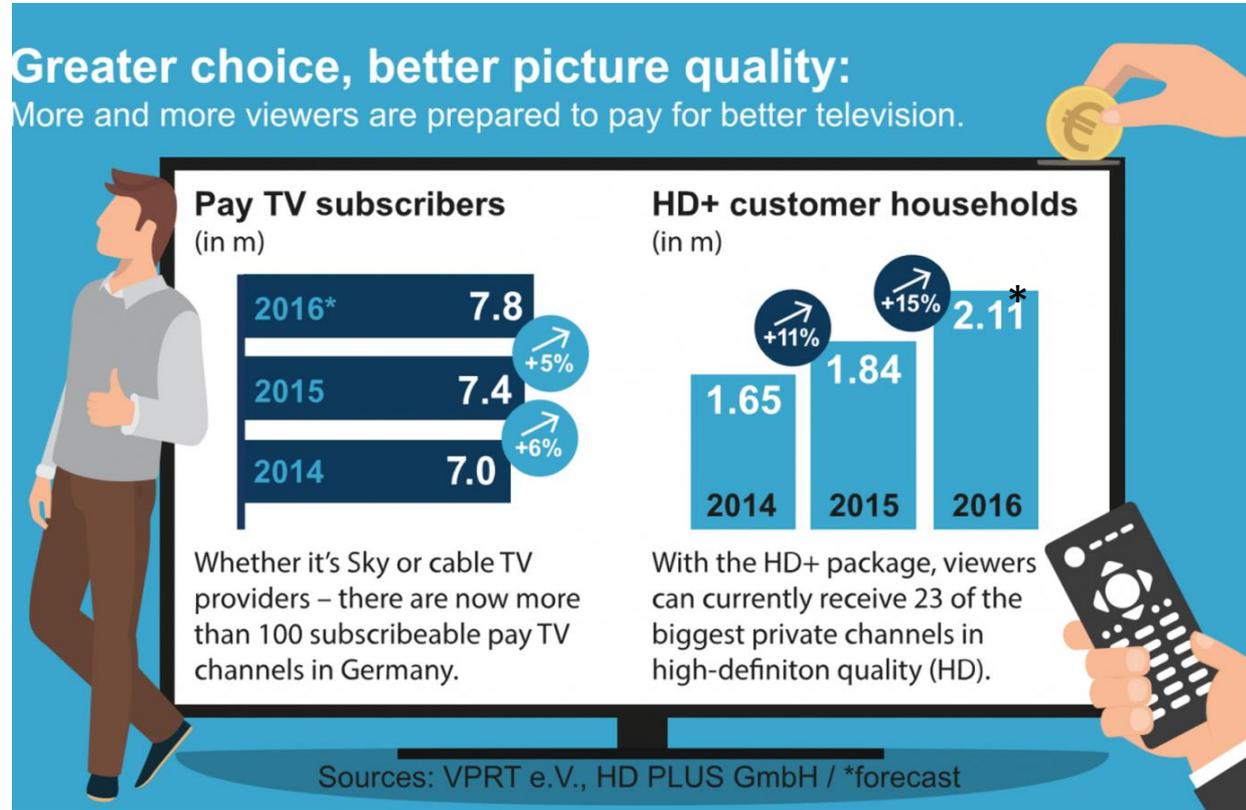
*Source: Eutelsat, **Source: gfu study 2016, ***SevenOneMedia, View Time Report



HD+

Greater choice, better picture quality:

More and more viewers are prepared to pay for better television.





freenet TV

During first month after launch of B2C DVB-T2 potential confirmed

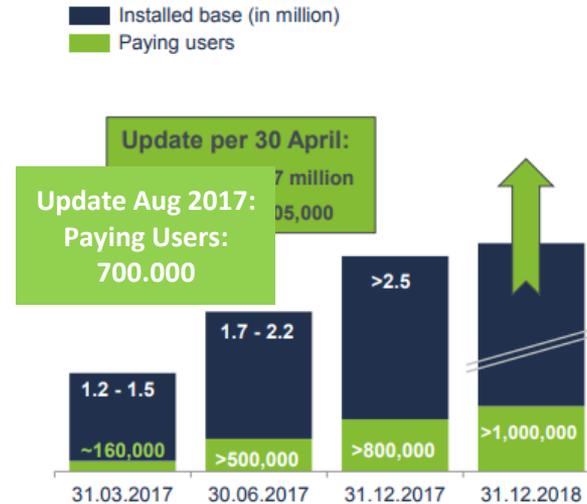
freenet TV

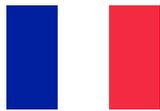
Expectation for 2017

- Average pay period 5 months
- Total revenues: 12-16 million euros

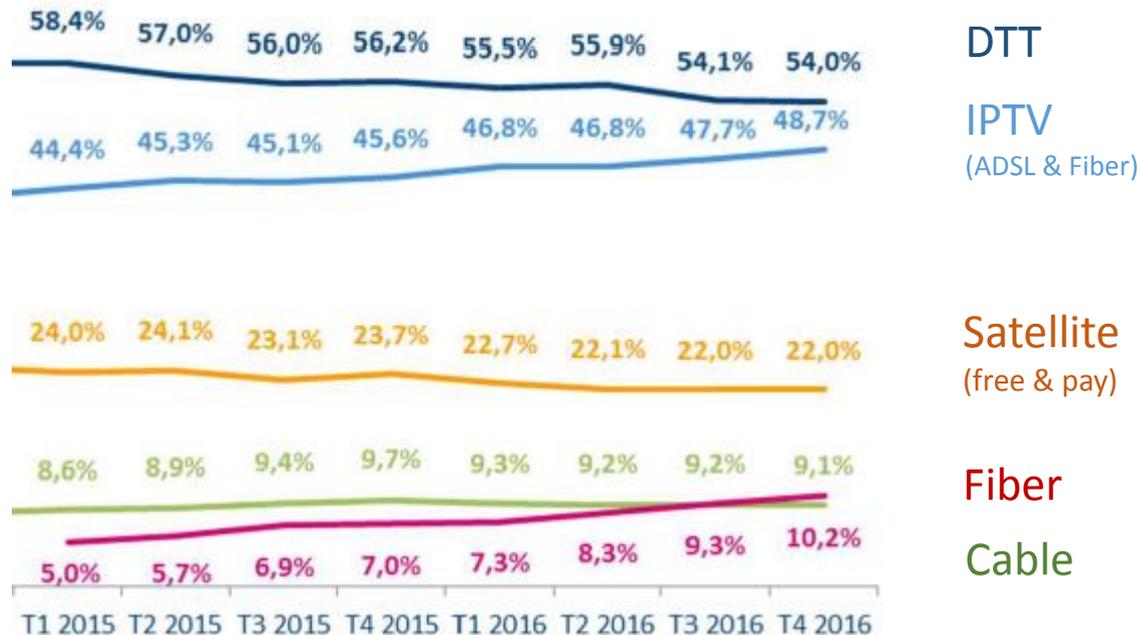
Early estimates for 2018

- Average pay period 10 months
- Total revenues: 35-50 million euros
- EBITDA contribution: 2.0 euros per subscriber and month



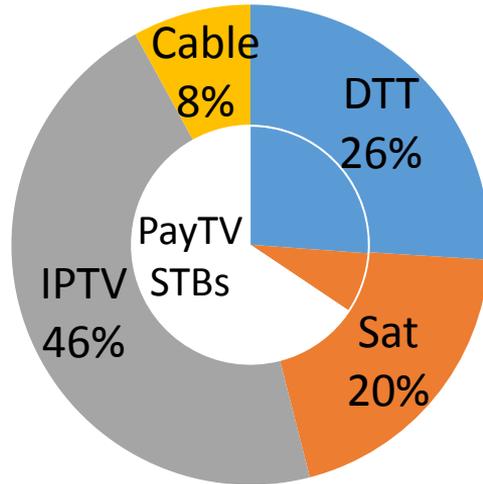


TV reception modes – Main TV Set



Source :

28 Mln TV Households



HbbTV Market Reach
(Fransat & DTT)
36%

Smart-TV share
2016



Source : 

Share HbbTV devices
on Smart-TV
2016



Source : 

- Smart-TV sales went down in 2016 because of moving to DVB-T2 (thus small TV sets were bought – all none Smart-TVs)
- Smart-TV sales in general is lower than in other European countries as there is large installed base of STBs
- CSA (French TV Regulator) is carrying out a public consultation on the future of DTT in France (DVB-T2, HEVC, UHD, HbbTV...)

The image displays a collage of HbbTV service screens. At the top left, the 'FRANSAT CONNECT' logo is visible. The main sections include:

- SERVICES**: A screen titled 'L'INFORMATION TRAFIC EN TEMPS RÉEL' (Real-time traffic information) featuring a map and a car icon, with the 'Infotrafic' logo below.
- REPLAY & VOD**: A screen for 'IRON MAN 3' with a 'VOD' label and a 'REPLAY' button.
- GUIDE DES PROGRAMMES**: A grid of program thumbnails with titles and durations. The grid includes:
 - EN CE MOMENT**: 'Tous ensemble' (53min)
 - À SUIVRE**: 'Comment ça va bien !' (43min)
 - VOTRE SOIRÉE**: 'Des chiffres et des lettres' (13min)
 - MES ALERTES**: 'Populaire' (8min)
 - Traditions et saveurs** (43min)
 - Le Noël des petites t...** (43min)
 - Sur les traces des ma...** (3min)
 - Navarro** (plus de 1h)
 - Génération Hit Mach...** (43min)
 - 90' enquêtes** (plus de 1h)
 - Tous différents** (8min)
 - Tellement vrai - La q...** (38min)

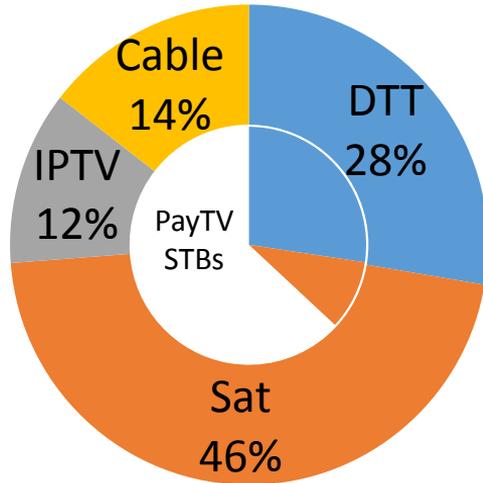
Navigation buttons at the bottom include 'MON COMPTE', 'AIDE', 'ACCUEIL', 'SERVICES', 'QUITTER', and 'ACCUEIL'.



United Kingdom



27 Mln TV Households



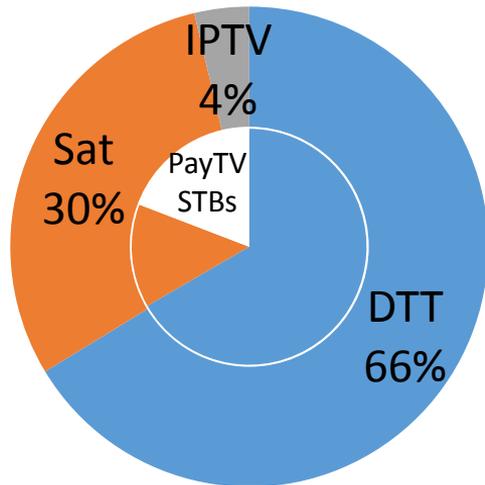
Source: dataxis

HbbTV Market Reach
Around 50%

DTT used in 73% Households

- Freeview Play launched in 2015 based on HbbTV 2, sales surpassed 1 million devices in March 2017
- Catch-up VOD services transitioning from HTML to HbbTV 2 for better interoperability (BBC iPlayer, ITV Hub, All 4, My 5, UKTV Play)
- UK transitioning broadcast interactive service to HbbTV 2.0.1 from MHEG from January 2018, interoperability test suite developed by DTG to support transition
- Freesat has deployed “HbbTV like” OpApps services

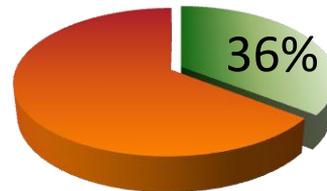
24.5 Mln TV Households



Source: IT Media Consulting, Dec 2016

Potential Market Reach
For HbbTV: Over 80%

Smart-TV share
2016



Source: GFK Panel Market, Dec 2016

Total Connectable
MHP devices



Source: GFK Panel Market & Mediaset Lab elaboration

Total Smart TV
deployed



Source: GFK Panel Market, Dec 2016

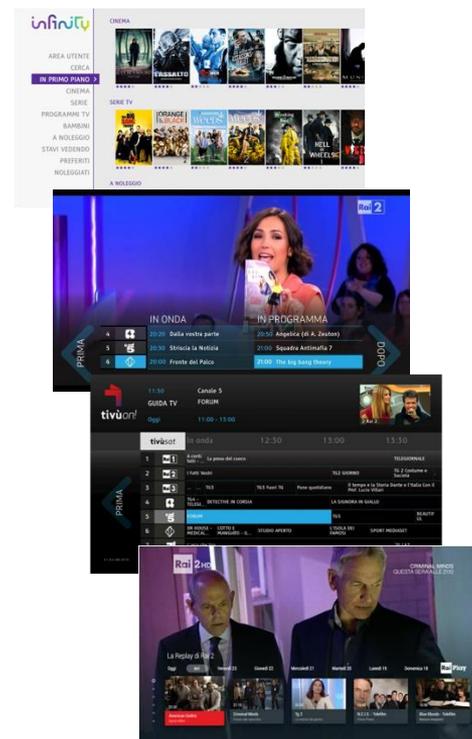
Total tivùon!
devices



Source: GFK Panel Market & Mediaset Lab elaboration

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

- Many catch-up services deployed with MHP
- Pay VOD services as well
 - Italy has more expertise in that field than most HbbTV deployed countries
- **tivùon!**, an MHP “Standard OpApp” service was deployed since June 2016 alongside the overall RAI and Mediaset channels lineup
- Italy has endorsed HbbTV 2.0.1 with the goal to deploy it in 2017
 - Italian broadcasters already successfully tested HbbTV signalization coexistence with MHP to verify that it does not interfere with MHP legacy
 - A few HbbTV services from major broadcasters will be available by the end of 2017

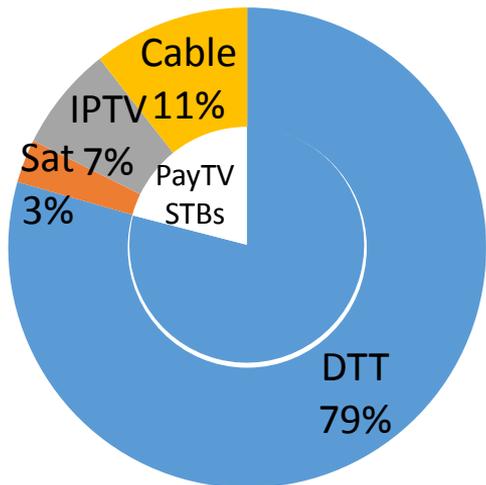




Spain



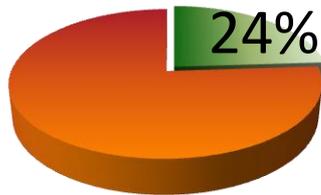
18 Mln TV Households



Source : Audience share Kantar media 2016 report

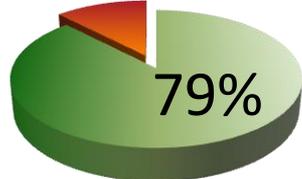
HbbTV Market Reach About 5.6 Mln TV Sets

Smart-TV share 2016



Source :

Share HbbTV devices on Smart-TV 2016



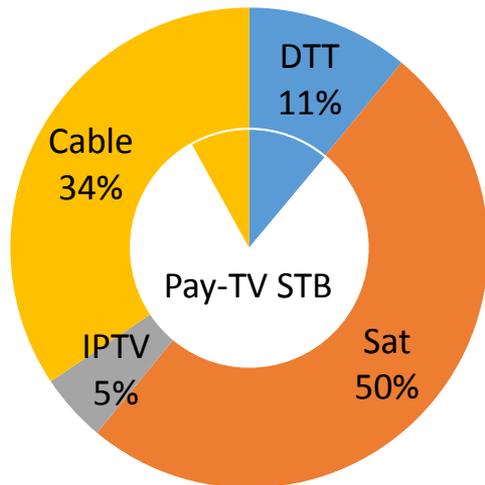
Source :

- Spanish Interactive Forum recommended HbbTV 2.0.1
- Certification Regime:
- Cellnex (DTT network operator) is the TDT Hibrida Certification Entry
- More than 16 chs are using HbbTV





13 Mln TV Households



Source: dataxis

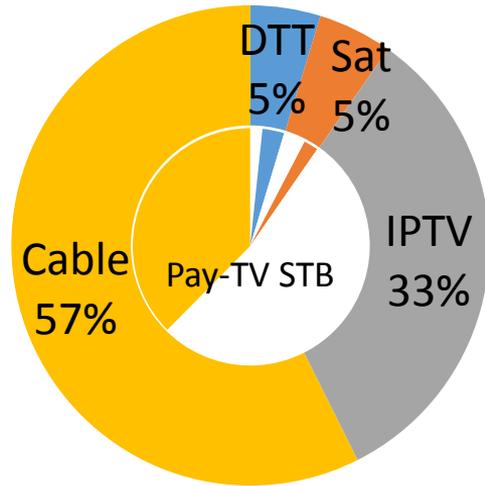
HbbTV Market Reach
Around 20% (GfK)

- HbbTV continues to be under pressure with Polish Public Broadcasters due to the political situation
- Status quo for HbbTV Broadcasters
 - No new developments from TVP, focus is on interactive advertising only
 - Commercial broadcasters like TVN and Polsat are using HbbTV for internal counting of unique devices
 - However HbbTV is available on TVP, ZPR, Zoom TV, Stopokatka TV, TVS, Test TV Portal from Emital – DTT Mux with 8 operators
- About 2M connected HbbTV TVs



The Netherlands

17 Mln TV Households



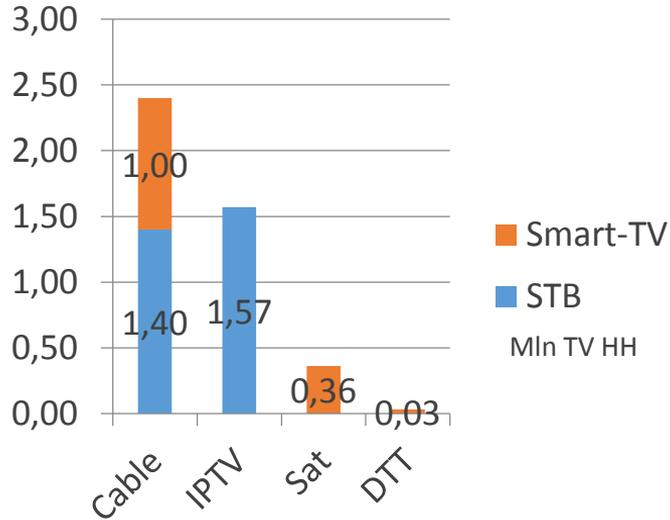
Source : dataxis

HbbTV Market Reach
70%

- Cable Operators are carrying HbbTV services
- Over 90% of households are watching TV through proprietary STBs
- Estimation of around 10 Mln HbbTV deployed



3.3 Mln TV Households



Source : dataxis

HbbTV Market Reach around 80%

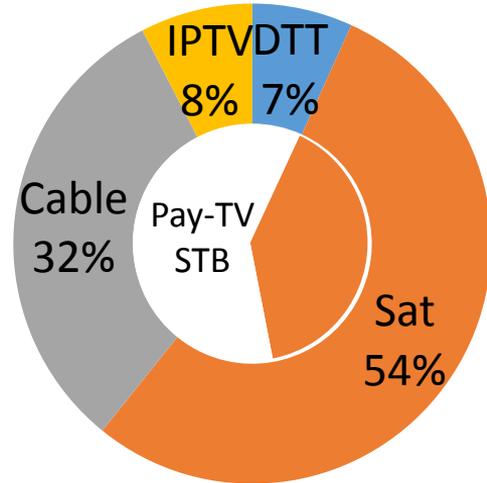
- Connected reach increased massively due to activation of HbbTV for Swisscom TV (IPTV) customers in September 2017
- Most network operators transmit the service (all large network operators but one)



Austria



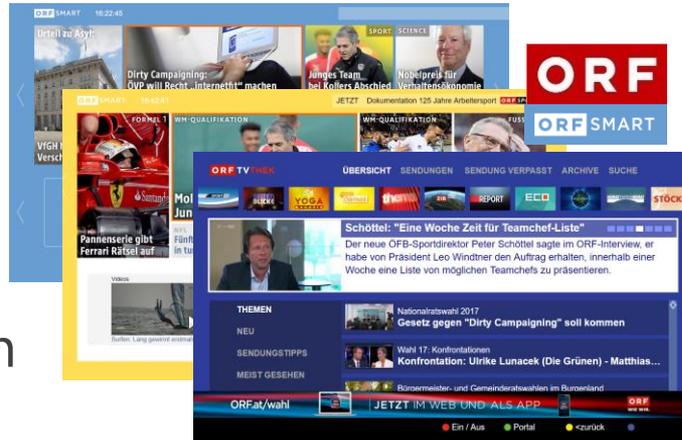
3.8 Mln TV Households



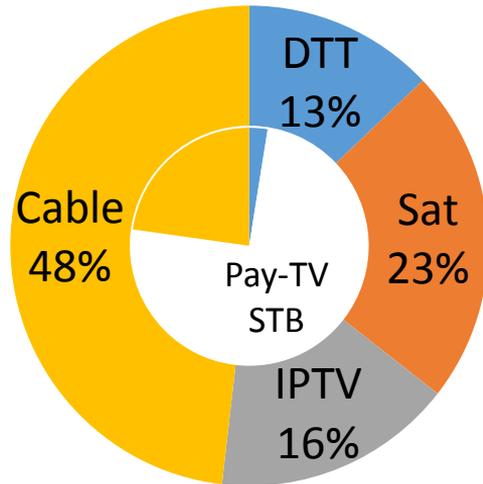
Source : dataxis

HbbTV Market Reach 80%

- ORF relaunched and rebranded its HbbTV services (“ORF Smart”) in February 2017
- ORF Smart: TVthek (access to 7-Day-Catch-Up-TV plus large TV Archive), extensive News, Weather & Sport information including video.
- ORF RestartTV (start-over service) is available on devices supporting HbbTV 1.5
- PULS 4, ProSieben Austria, SAT.1 Österreich and kabel eins austria are providing EPG, catch-up, games and more using HbbTV 1.5



4.1 Mln TV-Households



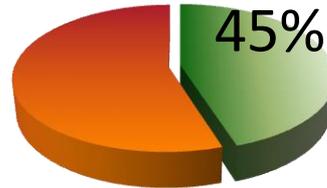
Source : dataxis

HbbTV Market Reach

18,5%

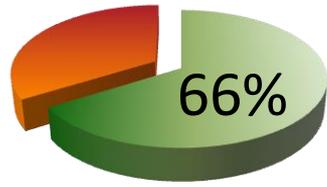
Source : Antenna Hungaria

Smart-TV share 2016



Source : GfK

Share HbbTV devices on Smart-TV 2016



Source : GfK

- Fox made HD services available via HbbTV in May 2017
- Cable and IPTV shares grew in 2016/17
- Main operators: UPC, Telekom, Digi and Invitel

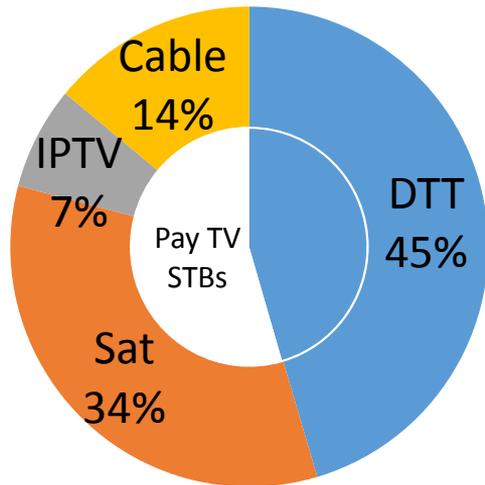




Czech Republic



4.5 Mln TV Households

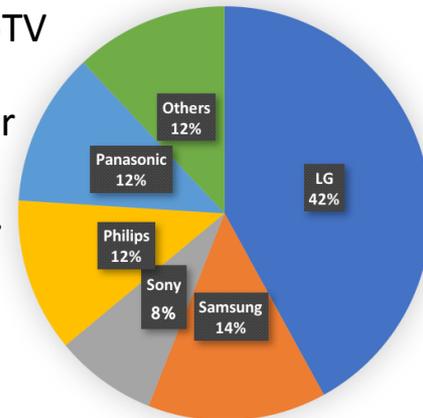


Source: dataxis

HbbTV Market Reach 30 %

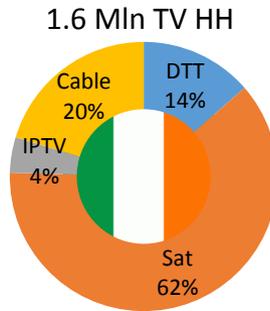
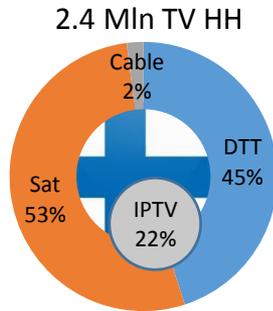
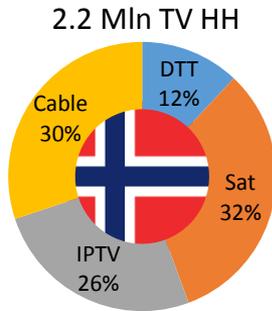
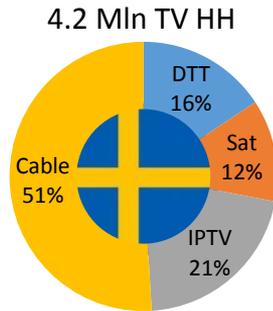
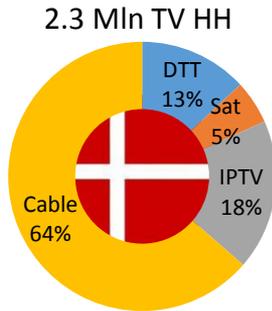
FTV Prima and České Radiokomunikace, HbbTV Research, July 2017:

- 1.325.000 unique viewers (2,06 viewer/per screen)
- HbbTV versions: 77% 1.5; 19% 1.0, 3% 2.0.
- 90% of sold TVs include HbbTV standard (DVB-T2 in 2020)



KEY FACTS:

- All TV Groups support HbbTV services
- 75% of viewers are aware of “Red Button”
- 300% year- to-year raise of commercial campaigns
- Premium channel, average CPT = 17EUR
- Automatic/programatic buying available since January 2016

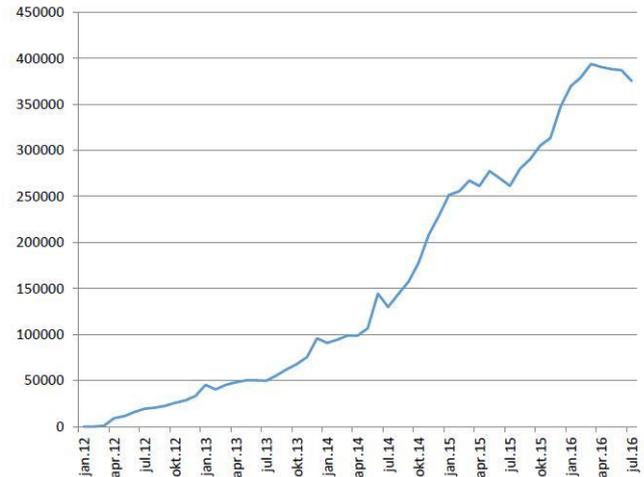


Source: Finnpanel

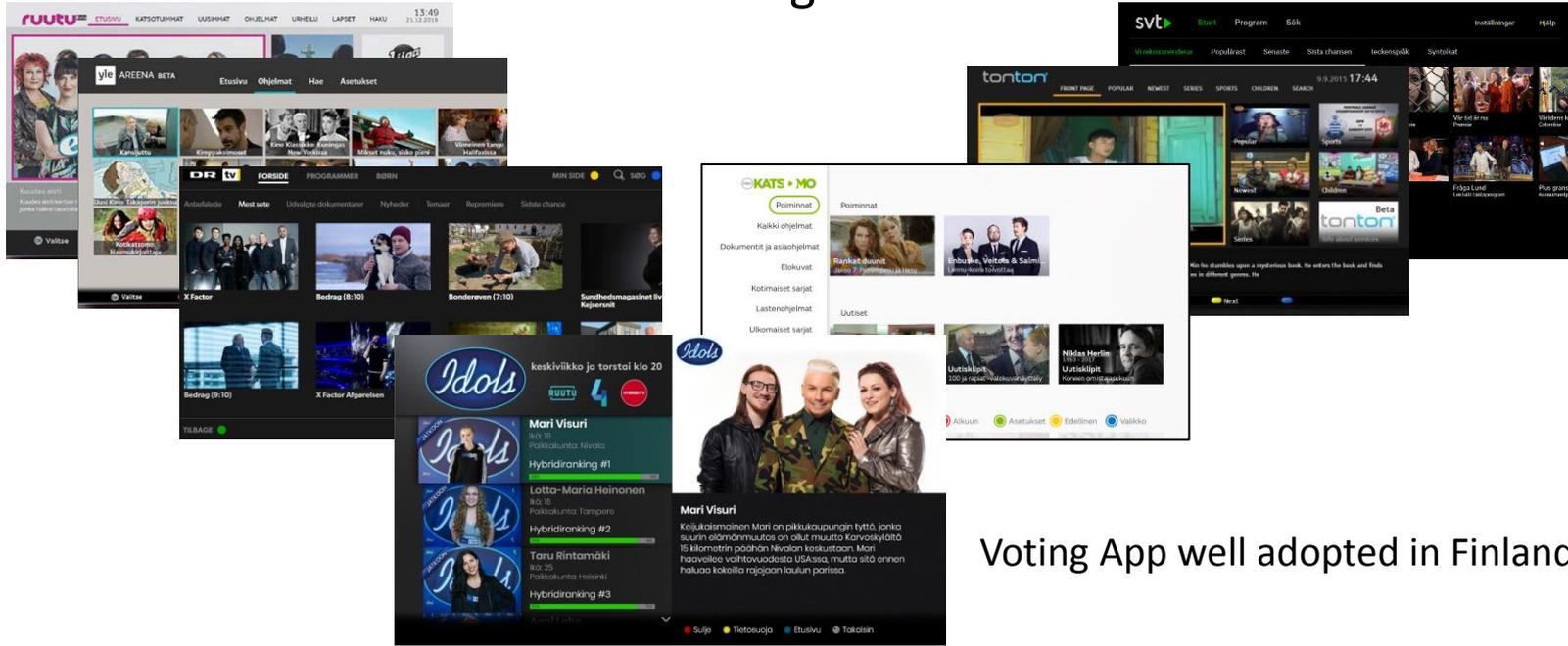
NorDig Unified IRD spec for Scandinavia & Ireland

- HbbTV 1.5
- HbbTV 2.0.1 > 1.7.18

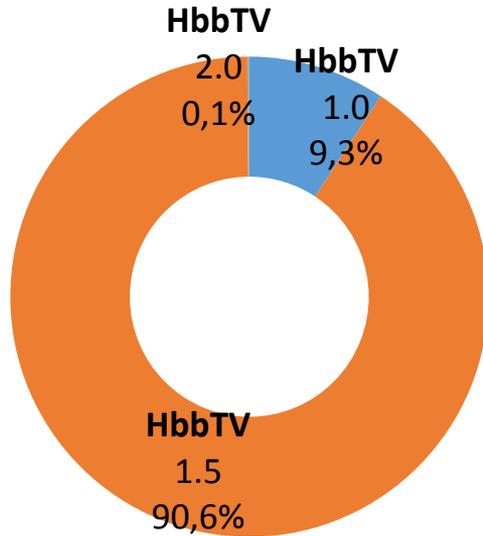
DR (unique users) – Only promoted with red button



Popular HbbTV services in the Nordic Region



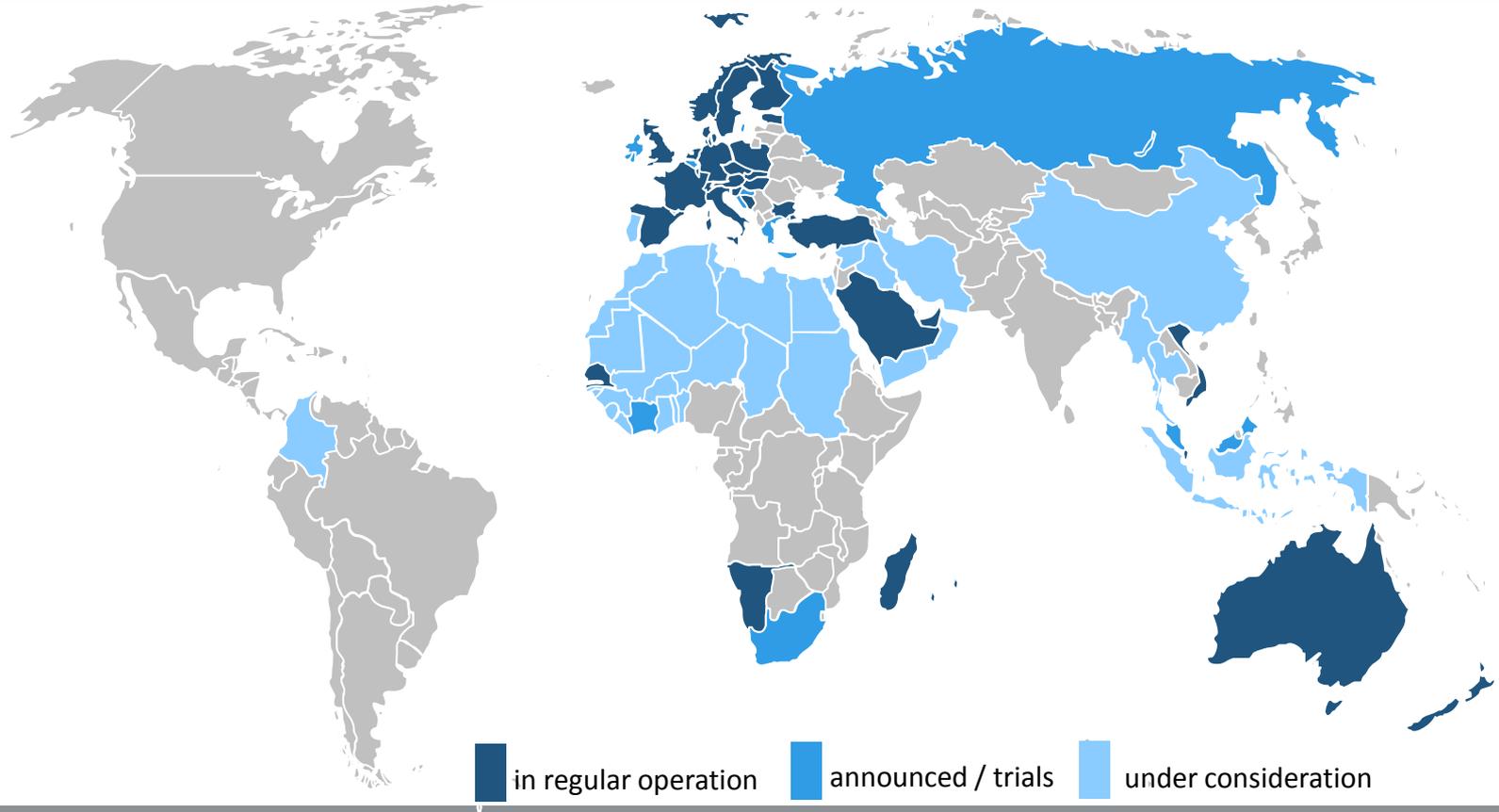
Voting App well adopted in Finland



- Finnish stats

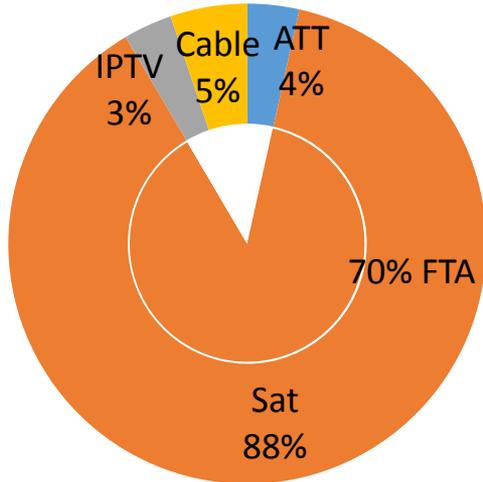
- Connected terminals ~160.000
- Daily unique terminals >80.000
- More than 90% HbbTV 1.5

HbbTV – Deployments Worldwide 2017





22 Mln TV Households



Source : dataxis

HbbTV Market Reach Over 88%

- Several broadcasters in Turkey have begun to use the HbbTV platform and services provided by Castoola and its local representative Broadcast Muhendislik Ltd.
- Castoola and several partners joined forces by launching the first HbbTV advertising campaign (Switch-in Superbanner) in 2017



- HbbTV devices in satellite reception
 - >500.000 regular HbbTV devices
 - 20% of Turkish people living outside Turkey



Middle East – 52 Mln TV-Households

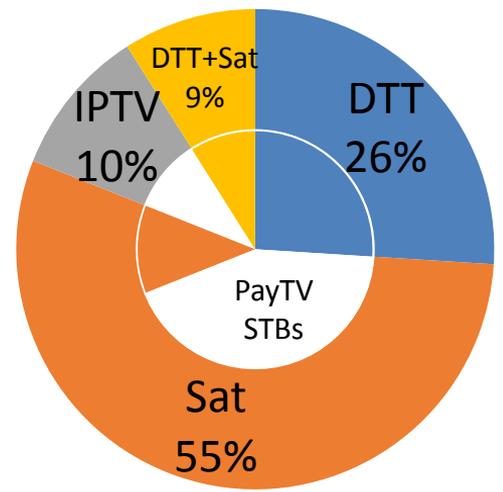


- Deployed in Middle East with Selevision
 - Satellite Pay TV platform (ArabSat)
 - Mainly Saudi Arabia and United Arab Emirates
- 200K HbbTV STB deployed
 - Mixing Android and HbbTV
- Deployed HbbTV services
 - BBC News Arabic
 - DW Arabic
 - Rotana
 - MBC
 - Citrus TV (TV shopping)
 - Al Arabiya





1.4 Mln TV-Households

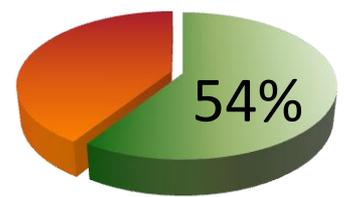


Source : Google Analytics

HbbTV Market Reach

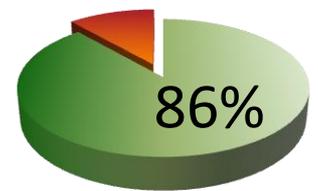
25% Source:

Smart-TV share 2016



Source:

Share HbbTV devices on Smart-TV 2016



Source:

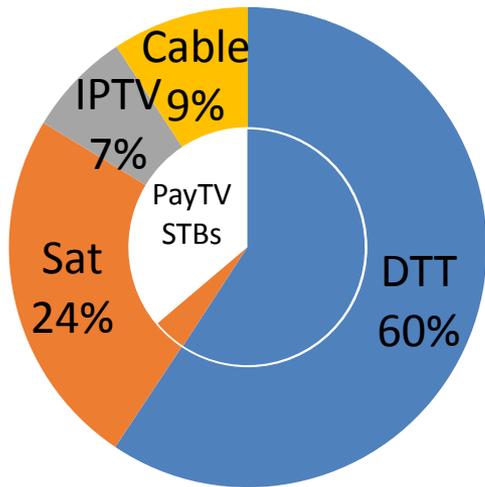
- Certification
 - HbbTV 1.5 with DRM
- “Standard OpApp”
 - Catch-up on 7 channels
 - VoD on 12 channels
 - Smart TV App
- Around 100k active HbbTV homes



Australia



9,2 Mln TV Households

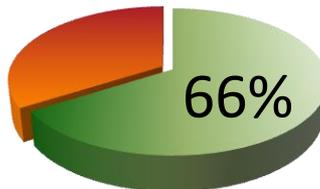


Source: dataxis

HbbTV Market Reach

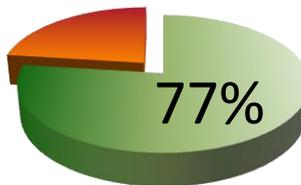
55% Source: GfK

Smart-TV share 2016



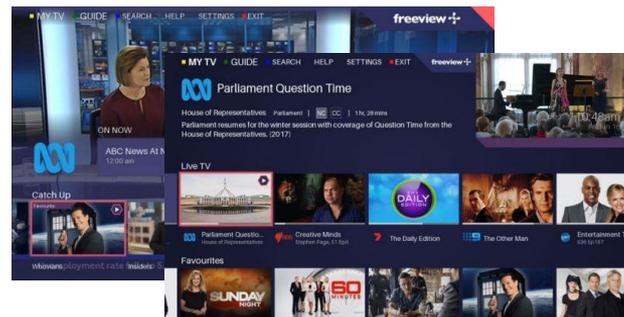
Source: GfK

Share HbbTV devices on Smart-TV 2016



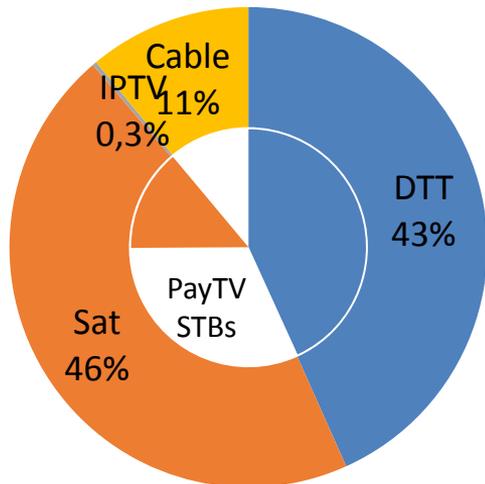
Source: GfK

- **freeview** LIVE TV • ON DEMAND Certification
 - HbbTV 1.5 with DRM
- **freeview** LIVE TV • ON DEMAND “Standard OpApp”
- Freeview revamped its On Demand service mid 2017
- 6 x HbbTV services (5 x broadcasters + FV+)





68,7 Mln TV Households



Source : dataxis

- Plan under discussion to merge the two main regulatory organisations ANCV and CRC
- This will delay an ongoing discussion to integrate several interactive platforms:
 - GINGA for interactive service on ISDB-T,
 - Hybrid European standard HbbTV and
 - SiestaCloud ecosystem for IPTV.



Africa – 120 Mln TV-Households

- No further update to 2016
 - South Africa Government reiterates plan for analogue switch-off by end of 2018. 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: Free DTT will be launched in 2017/18
- For most African countries Analog Switch Off is not expected to happen before 2020 (instead of 2015)

- 27 further countries (representing about 650 Mln TV Households) are considering the introduction of HbbTV in the next years



- Please also visit the website www.hbbtv.org/deployments



- If you have ANY information on HbbTV country details please send this to heinrich.haase@htbc.de – Many Thanks!

Thanks a lot to the following people for their help putting this presentation together:

Régis Saint Girons, Pawel Tutka, Angelo Pettazzi, Jason Foden, Xavier Redon, Rob Koenen, Matthew Huntington, Jiri Vorisek, Werner Debuigne, Martin Spycher

Special thanks go to:

