HbbTV, la technologie qui peut transformer la TV en Europe?

Hybrid TV – Better TV

8th HbbTV Symposium & Awards

21-22 November 2019, Athens

Vincent Grivet – Chairman of HbbTV
Disney passes 10m streaming sign-ups in one day

Wall Street analyst calls early results for Disney+ video service ‘jaw-dropping’

Anna Nicolaou in New York NOVEMBER 13 2019

Walt Disney said on Wednesday that more than 10m people have signed up to its new video streaming service, only a day after its launch, wowing investors and sending its shares sharply higher.
Is Broadcast TV Dead?
Broadcast TV used to enjoy a double cosy monopoly

Sole way to bring movies and video entertainment to homes

Sole way to bring video ads to home consumers
Challenge 1: growth of on demand watching

Ad Free SVoD viewing versus Ad based TV per day

Sce.: Rethink TV – February 2019
Challenge 2: aggressive new OTT players with compelling content...
Challenge 3: … and compelling UX
Challenge 4: ... data driven marketing & dominance of digital advertising

State of the U.S. Advertising Market
U.S. advertising revenue forecast by medium (in billion U.S. dollars)

<table>
<thead>
<tr>
<th>Medium</th>
<th>2017</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet</td>
<td>116.2</td>
<td>120.4</td>
</tr>
<tr>
<td>Digital</td>
<td>5.7</td>
<td>11.0</td>
</tr>
<tr>
<td>TV</td>
<td>86.4</td>
<td>75.2</td>
</tr>
<tr>
<td>Radio</td>
<td>18.2</td>
<td>19.1</td>
</tr>
<tr>
<td>Newspapers</td>
<td>16.8</td>
<td>12.2</td>
</tr>
<tr>
<td>Consumer magazines</td>
<td>16.6</td>
<td>16.7</td>
</tr>
<tr>
<td>Out-of-home</td>
<td>9.5</td>
<td>11.0</td>
</tr>
<tr>
<td>Trade magazines</td>
<td>4.4</td>
<td>4.5</td>
</tr>
<tr>
<td>Video games</td>
<td>1.4</td>
<td>1.9</td>
</tr>
<tr>
<td>Cinema</td>
<td>0.9</td>
<td>1.0</td>
</tr>
</tbody>
</table>

Traditional media figures include digital revenue for the respective medium, e.g., video ads around TV content on broadcaster-owned websites. All digital segment revenues are also included in the internet advertising total.

Source: PwC

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Challenge 5 : IPTV intermediation

Modes de réception de la télévision (poste principal)
L’interconnexion par internet est le premier mode de réception de la télévision sur le poste principal

En France, la réception hertzienne terrestre connaît une légère hausse sur le poste principal début 2018, réduisant de façon significative la réception par internet (de 8,2 points fin 2017 à 7,3 points au 2ème trimestre 2018). Ces chiffres révèlent en creux la réception hertzienne est plutôt utilisée sur poste secondaire, probablement en raison de sa gratuité.

Modes de réception de la télévision sur le poste principal

<table>
<thead>
<tr>
<th>Modèle</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>TNT</td>
<td>44,9%</td>
<td>44,9%</td>
<td>44,9%</td>
<td>44,9%</td>
</tr>
<tr>
<td>Réception hertzienne terrestre **</td>
<td>42%</td>
<td>43,8%</td>
<td>45,2%</td>
<td>44,7%</td>
</tr>
<tr>
<td>Satellite</td>
<td>21%</td>
<td>20,4%</td>
<td>19,7%</td>
<td>19,8%</td>
</tr>
</tbody>
</table>

*IPTV haut et très haut débits *
Challenge 6: blurring Free and Pay worlds

Free TV: TF1, iTV

Light Pay: Essentiel, Netflix

Pay TV: CANAL+, Sky

My Sky via fibra
€ 29,90 al mese
€ 49,60/60€ al mese
PER I PRIMI 12 MESI
In summary: Broadcast TV faces many tough challenges

1. Consumer appetite for on demand viewing
2. Aggressive and talented new OTT players with compelling CONTENT...
3. ... and sophisticated modern user experience (CONTEXT)
4. Data driven marketing and digital advertising
5. Operator / IPTV intermediation
6. Blurring Free / Pay segmentation
But Broadcast TV has still many strengths

- Linear Viewing still dominant
- Broadcast Access to TV still very important
Broadcast access to TV is still quite important

DTT ranking:

- UK: 46% DTT reception, 26m TVHHs
- France: 45% DTT reception, 28.7m TVHHs
- Germany: 6% DTT reception, 39m TVHHs
- Spain: 63% DTT reception, 17.7m TVHHs
- Italy: 58% DTT reception, 24.9m TVHHs
- Scandinavia: 21% DTT reception, 12m TVHHs

Other FTA TV (sat/cable):

- UK: 46% other FTA TV
- France: 45% other FTA TV
- Germany: 6% other FTA TV
- Spain: 63% other FTA TV
- Italy: 58% other FTA TV
- Scandinavia: 21% other FTA TV

DTT penetration in 2015 (% of TVHHs, main TV set)

Source: Idate, Freeview, CSA
But Broadcast TV has still many strengths

- Linear Viewing still dominant
- Broadcast Access to TV still very important
- High Value TV Brands
- Mastering Content Supply Chain
- Commanding position on advertising
Broadcasters are not the born losers of this change of paradigms

Broadcaster need to transform and adapt to this new world to continue to please end-users

• Present their content assets also in OTT style
• And do that in a way that takes advantage of massive legacy linear advantage
• UX, end-user coaching, relationships
• Branding, educating the market on new TV proposals
• Aggregation
• Introduce Addressable advertising
• Become data-minded publishers, also for the classical TV

These changes are all possible … with HbbTV!
Broadcast transformation is on its way in Europe …

- 2015 – HbbTV 2.0.1
- 2017 – HbbTV 2.0
- 2018 – HbbTV 2.0.1
- 2020 – HbbTV 2.0.2
- 2017 – HbbTV 2.0.1 + OpApp

New countries?
What happened in the HbbTV Ecosystem in 2019?
ADB2 published in Sept 2019

ETSI TS 103 464 V1.2.1 (2019-??)

Hybrid Broadcast Broadband TV
Application Discovery over Broadband
Hybrid Broadcast Broadband Television: Targeted Advert Replacement; Part #1: Functional Requirements

Hybrid Broadcast Broadband Television: Targeted Advert Replacement; Part #2: Non-functional Requirements
Dear members,

This is a note to let you know that the capture window for the call for input to the HbbTV specification update will close tomorrow, **Tuesday, March 5, 2019**.

The HbbTV Requirements Group’s annual capture cycle is your chance to have your say on what will be in the subsequent versions of the HbbTV
Release V2019-3 (Nov 2019)

2,492 tests
12 New Members since Berlin!

+10%

Nov 2018: 6
Nov 2019: 7

9

+10%
OpApp service launches

1st real world OpApp deployment using HbbTV

Watch an OpApp introduction here

Watch the replay of the 1st OpApps Webinar here

Panasonic deploys HbbTV OpApp for HD+ access in Germany
Salto reg. clearance in France
New in country recommendations from national “advisory” bodies

NB: “mandation” as a legal obligation applied or considered in some countries; HbbTV is neutral on this aspect
Intense HbbTV-Based Targeted Advertising activity: POC + commercial grade
Our success comes with challenges

- From a specification producer to the animator of an ecosystem
- Evangelizing, informing and coaching a broader community
- Delivering the technical tools (tests, interop., ref apps, ..)
- Making sure HbbTV works
- Helping the value chain alignment
- Making sure our specs reach to consumer and homes and serve what they are supposed to serve
- Right balance richness- implementability
- National markets Fragmentation
- Funding a larger spec / scope
What to expect in 2020?

• Stabilizing specification
• Improved OpApp
• Better monitoring & measuring of the deployment
• Streamlined liaison with national platforms
• New elections!
• 10 years anniversary!
End user want new, enriched services on their TV set
And the same for advertisers
Broadcasters need and want to serve these needs (and not let open road to rival OTTs pure-plays or leave new advertising formats to dominant global players)
**HbbTV is the friendly “TV OS” for them to do so**, leveraging their unique broadcast presence
And it is a safe option for TV manufacturers to deliver equipment aligned with these new end user expectations & new broadcaster services
TV & Broadcast are not dead …

They are engaging a massive & necessary transformation in a fast changing world

And this happens with HbbTV!

and HbbTV Needs you to make it happen!