Global TV Market Review—November 2021

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TV shipment history to Q2’21

Source: Omdia

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European TV market over the pandemic

Source: Omdia

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European TV market over the pandemic

TV Shipment history, annualized.

Source: Omdia

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Informal Classification: General
Sharp growth in TV viewing over the pandemic

TV Viewing hours 2020 v. 2019

Source: Omdia

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Linear TV generally firm; online was big growth story

Viewing hours growth 2020 v. 2019

Source: Omdia
TV household share

TV Household Share forecast

Source: Omdia

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Rise of the streamers

- Streaming bridges UHD gap

- Consumer familiarity with streaming:
  - Automatic access to UHD,
  - no conscious decision
Smart TV platform share, 2Q21

- Tizen led historically everywhere except China and Japan (Samsung does not sell TVs in Japan).
- Xiaomi brought Android to the leading platform in Asia-Pacific. In recent quarters Samsung has staged a fightback.
- North America has most diverse offering. Roku leads very clearly now.
- FireTV OS and Roku launched in Europe in late 2019.
THE NEW TV BATTLEGROUND

Source: Freepik.com Racool_studio
How can streaming services be noticed?
Pay-TV providers launch TV sets

- Rush to launch TV models: first on the screen
- 3Ready offers software with similar results

Sky Glass TV Set

Source: Sky UK

Amazon FireTV Omni

Note: Subscriptions may be required
Source: Amazon

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Battle to be front of the queue

Top of EPG

Top of App Store

Control the TV?

Widest App Support

Top of the Splash Screen

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What do consumers want?
Preferred device for free (Ad-supported) VOD consumption

First choice device for AVOD services

- Emerging markets more phone-centric
  - Helped by incredible free data in India
  - Smartphone the Swiss Army knife of modern living.

Notes: Percentage of consumers that select an AVOD service as their first choice, excludes YouTube.
High PC usage corresponds to declining TV households

- TV ownership in Japan and Germany is falling — Below 90%
- Younger consumers moving away from TV
- Consumers not making connection between streaming and Television sets?

Notes: Percentage of consumers that select an AVOD service as their first choice, excludes YouTube.

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Streaming bridging to new broadcast technologies

Original vision of UHD

- Demo channels
- Streaming services
- Best-of channels
- Service Expansion

Today’s UHD roadmap

- Demo channels
- Streaming services
- Broadcast hybrid streaming
- Broadcast
- 5G / Broadcast
Conclusions
Conclusions:

- Pandemic confirmed how much consumers’ value TV
- All growth lies in Streaming – free, pay, PSBs...
- The battle for attention has started.
- What will be HbbTV’s role?
Questions?

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Thank You

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