How can broadcasters keep thriving in the complex and fragmented world of Connected TVs ?

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Key trends of the TV world (you all know it)

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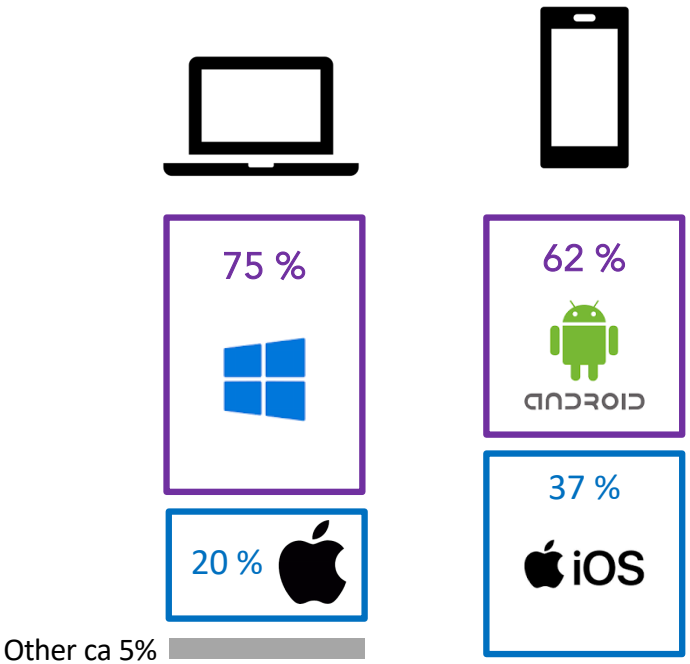
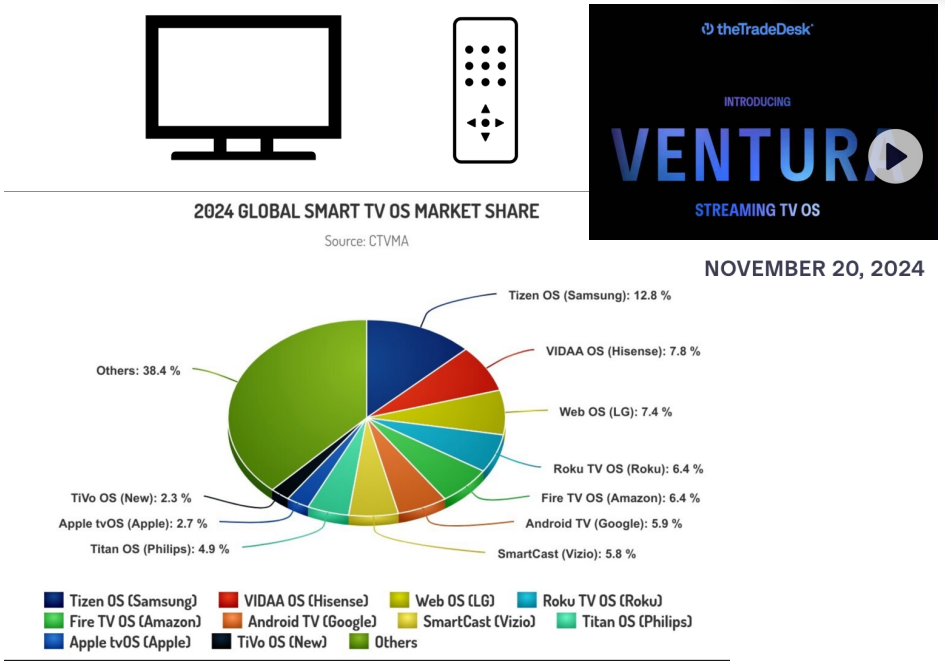
- Linear TV declines and is progressively equalled by VOD (all forms)
  [NB : but linear still very substantial]

- (S)VOD now embracing the core DNA attributes of linear TV; live, sports, advertising
- … and reciprocally, traditional TV channels determined to redefine themselves as hybrid media providers ; linear + VOD
- Digital advertising grows while traditional TV advertising stagnates; Broadcasters shift to addressable
- Big TV screen remains the N°1 viewing screen
- TVs are now CTVs

Our world is moving towards a Hybrid co-leadership of legacy Broadcasters and new VOD/streaming services … and this happens on CTVs

CTV is a very fragmented world : >10 relevant OSs

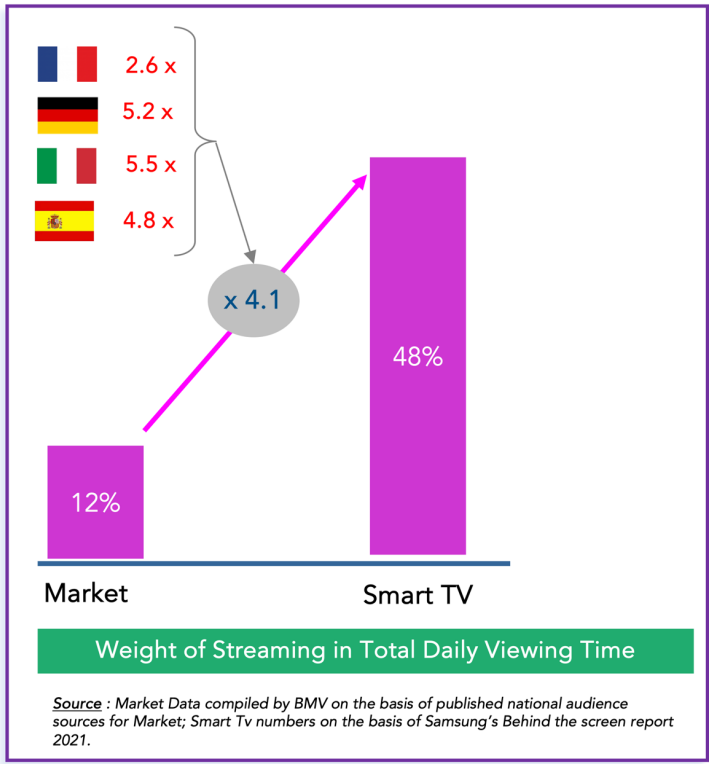


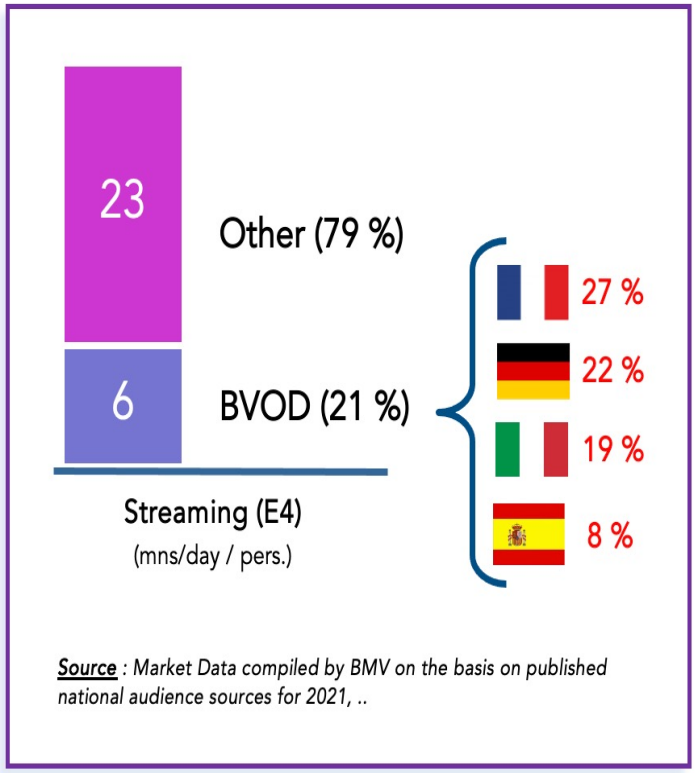


The CTV walled gardens may create significant issues for Broadcasters

- Need to manage 10-15 distinct technical environments (apps), with diminishing returns
- Broadcaster is one app amongst many : loss of prominence
- The rules of the CTV are set by the CTV / OS maker
  - Is my data really my data ? Can I use it (or do I need to re-buy it) ?
  - Is my content safe (or shall I accept that some of my content is “borrowed” to serve other purposes) ?
  - Do I still own my audience ? Can somebody observe my viewers and lure them elsewhere ?
  - Can I freely manage my ad inventory with my own tech (vs imposed sales house or adtech) ?
  - What is the Cost ?
- CTV remains widely un-regulated (vs DMA which mitigates dominance of gatekeepers in Mobile and Web)

CTV is a clear challenge to broadcaster traditional leadership





Finally some good news….

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HbbTV

Unifies CTV for Broadcasters

Enables Broadcasters to deploy their services with reasonable business autonomy and safety on Connected TVs

Who is HbbTV ?

a global initiative dedicated to providing open standards for the delivery of advanced interactive TV services through broadcast and broadband networks for connected TVs and set-top boxes

- industry led standardization body, 15 years of cooperation
- European focus (but now beyond Europe)
- 60+members;
- Initial focus : enrich broadcast with interactive services
- Current focus : opens standard for CTVs, independently of Broadcast networks; IP-ready
- Specifications + tests + ecosystem support

How HbbTV helps Broadcasters strive in the CTV world

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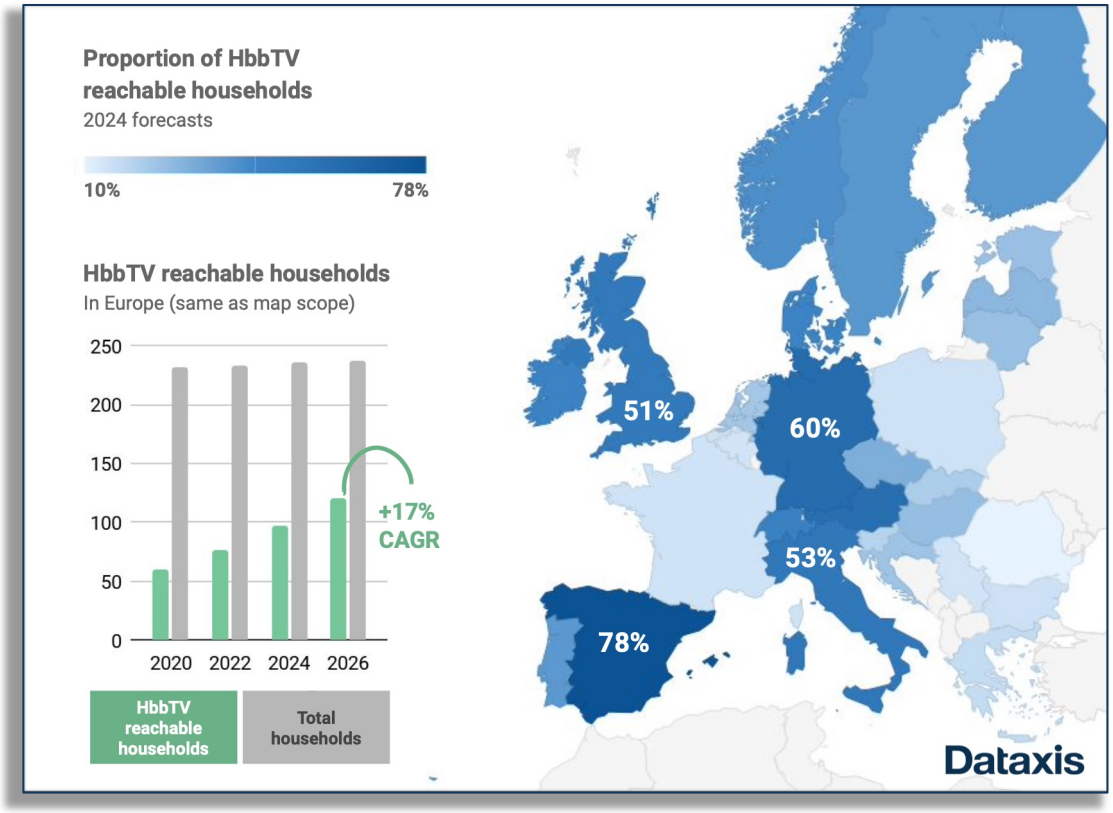
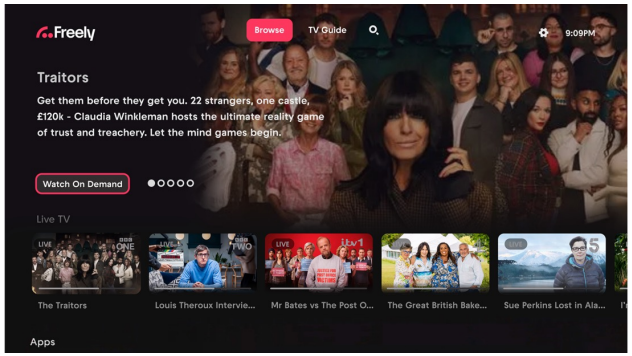
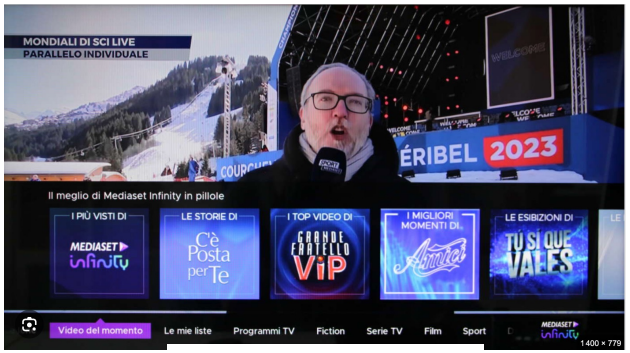
- ✓ Any service / function which can be done in CTV can be done in HbbTV (and even more)
  - ✓ **B2C services** : “red button”, replay, start-over, enriched TV/information, accessibility, EPG, search, voting, personalization, multi-camera, UHD enhancement, ..
  - ✓ **B2B services** ; consent, audience measurement, addressable advertising
- ✓ Open Spec (no royalty)
- ✓ Launch point = TV content (not a menu); enables Broadcasters to exploit their linear leadership
- ✓ Transversal, horizontal : one app for all TV brands (vs N apps) and all delivery networks
- ✓ Broadcaster centric ; control of services (and data) is entirely in the hands of broadcaster (a 3d party cannot intervene in the HbbTV app; “safe zone”)

A proven and scaled technology



Broadcasters across Europe rely on HbbTV to organize their presence in a connected world





… and many more across Europe

Audience Measurement with HbbTV

- Complement panels with big data
- Low cost
- Simple consent management
- Remove zero ratings / long tail

Addressable Advertising with HbbTV

- HbbTV enables addressable advertising (replacement) with core specification since 10 years
- Also enables “special” formats (eg ; L-Shape)
- HbbTV-TA specification enables frame accurate (invisible) dynamic ad substitution
- TA compliant receivers now on sale ; 15-20m in 2026 (est.)

… and many more across Europe

Wrap-Up

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- Broadcasters severely challenged by new TV paradigms and players
- CTV are great as they support Broadcaster adaptation to new market conditions
- But CTV may pose several issues for Broadcasters, starting with technical fragmentation
- HbbTV creates a more friendly option for Broadcasters on CTVs
  - All modern features and functions are available
  - Technical unification : a single app
  - A friendly and controlled application environment - avoid unwanted intermediation