# Unifying the fragmented CTV opportunity with HbbTV

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**Chairman of HbbTV Association**

Connected TV World Summit
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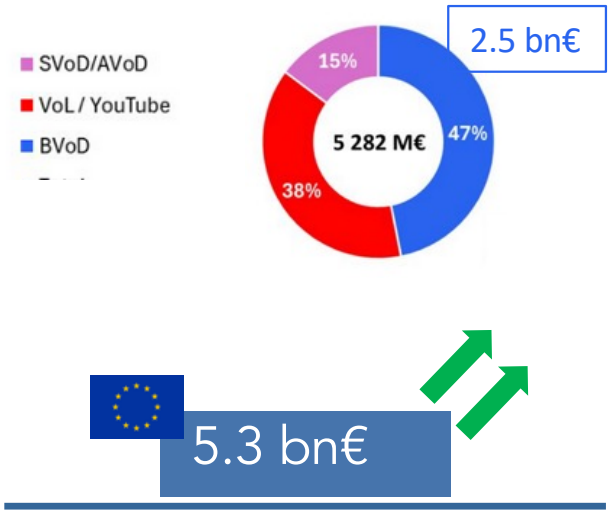
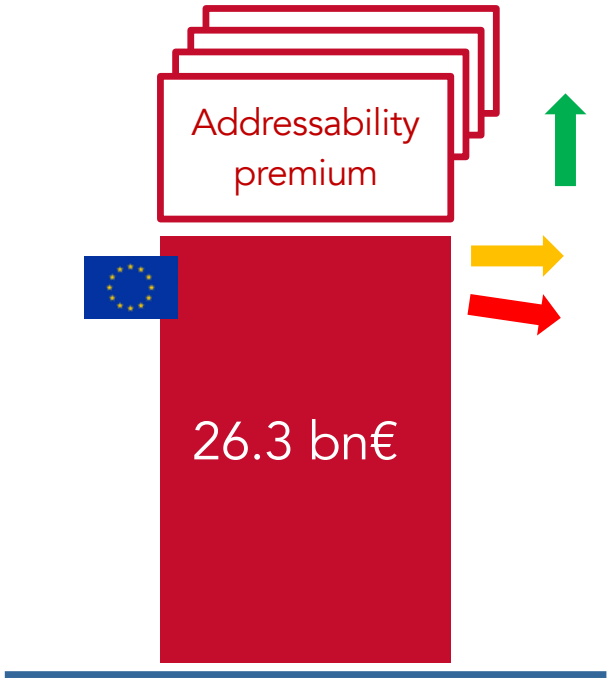
# The Addressable Advertising Opportunity for Broadcasters



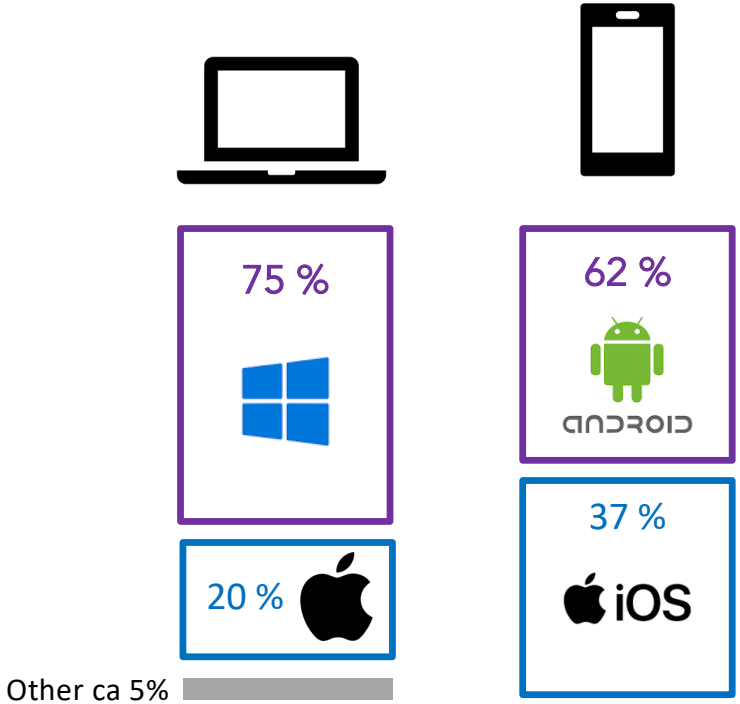

**CTV advertising**

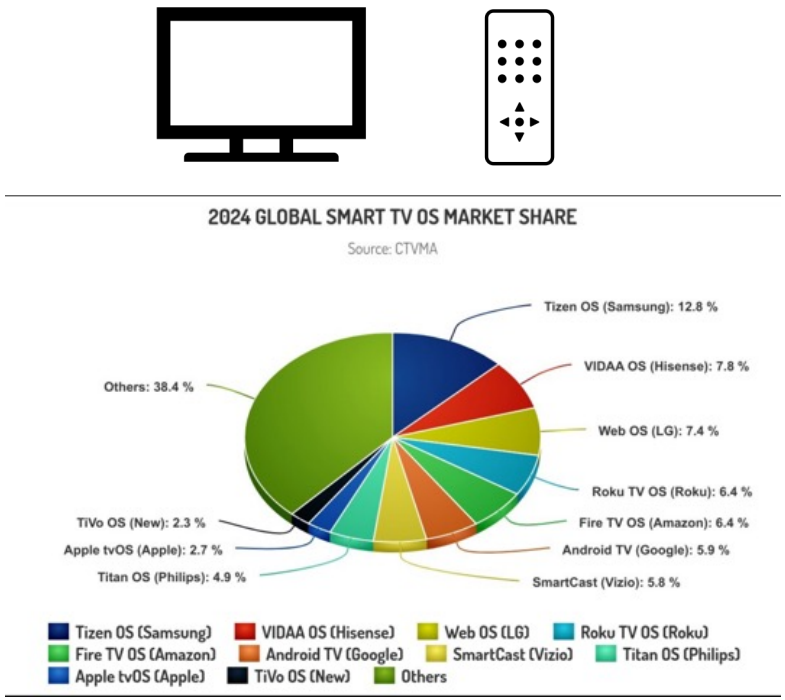



**Linear TV advertising**

Source : NPA Conseil – European Audiovisual Observatory – BMV Analysis

# Challenge : fragmented world of CTV



# The CTV silos may create significant challenges 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
  - Data ownership ( and reselling)
  - Disaggregation and selective promotion of content
  - Audience ownership ?
  - Control of ad inventory /ad sales / ad tech ?
  - What is the Cost ?
- CTV remains widely un-regulated (vs DMA which mitigates dominance of gatekeepers in Mobile and Web)

# HbbTV, making the world of CTV more friendly for broadcasters

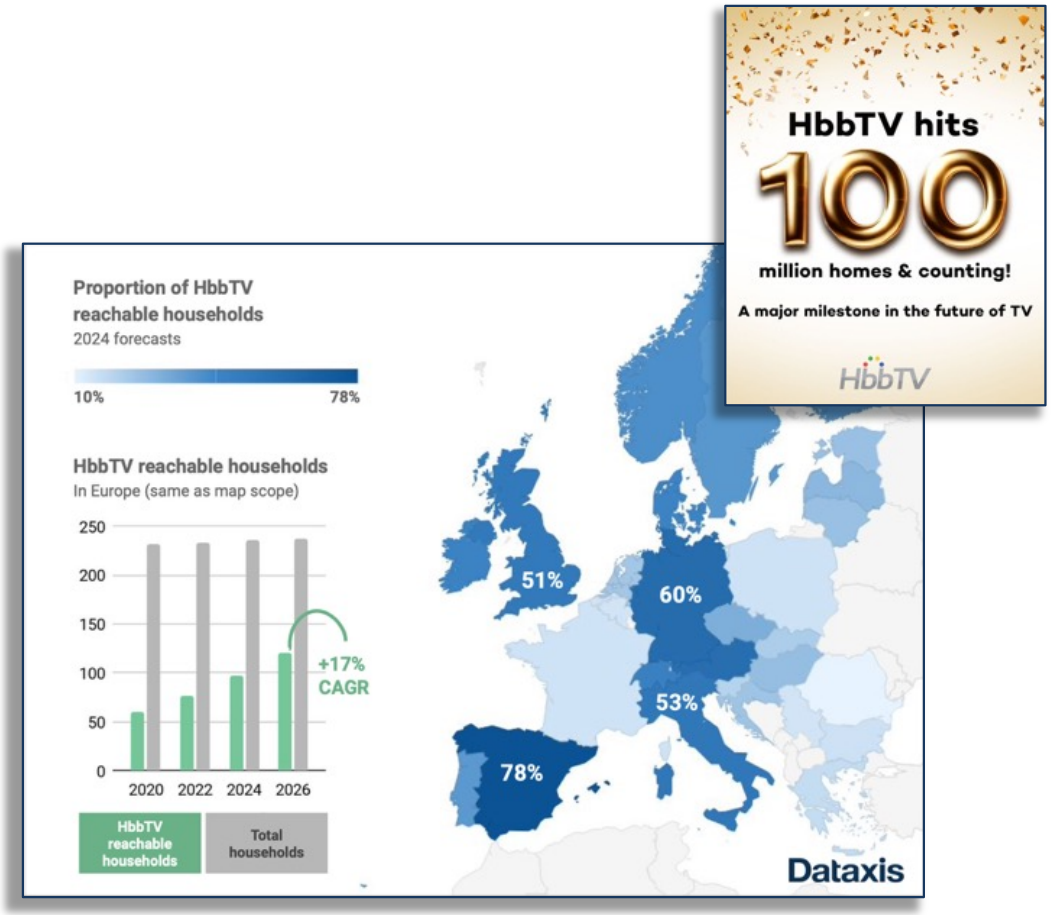
- ✓ Technology unification – de-fragmentation
- ✓ Enables Broadcasters to deploy new IP minded-services with reasonable business autonomy and safety
- ✓ Enables Addressable Advertising on CTVs , **including on live broadcast**

# 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

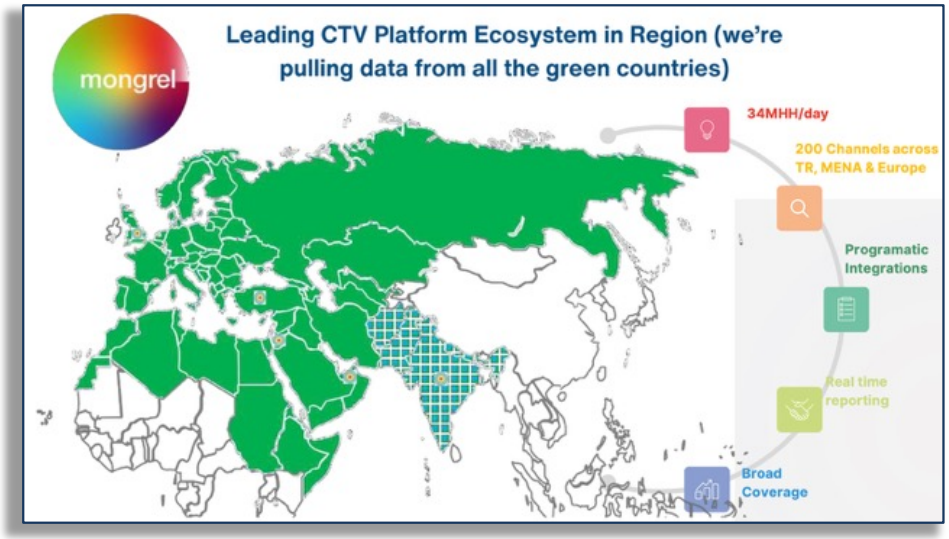
- Non profit : industry led standardization body, 15 years of cooperation
- Specifications + tests + ecosystem support
- European focus (but now beyond Europe)
- 60+members;
- Initial focus : enrich broadcast with interactive services
- Current focus : open standard for CTVs, independently of Broadcast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

# A proven technology, at scale in Europe … and beyond

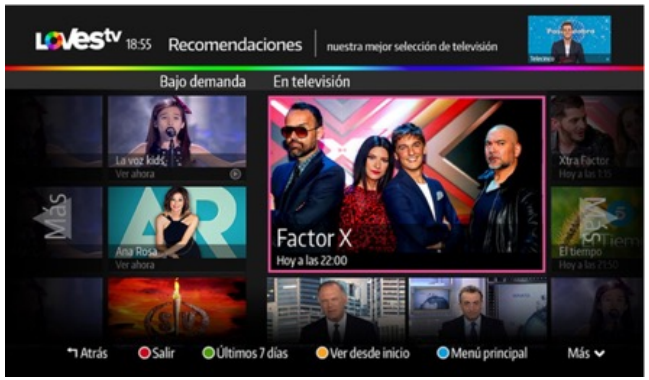


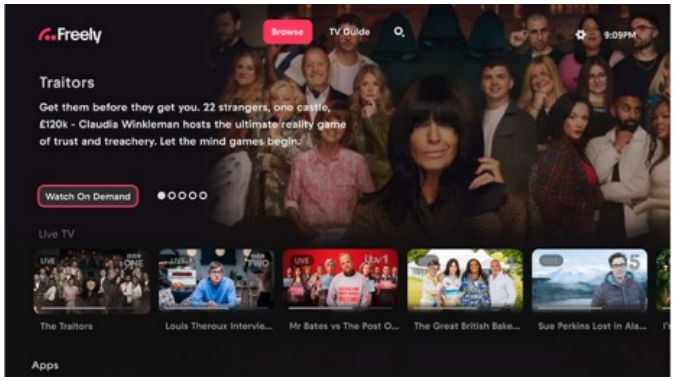






# Broadcasters  across Europe rely on HbbTV to organize their presence in a connected world



… and many more across Europe, and beyond

# HbbTV enables Addressable Advertising in Linear Broadcast TV

- Core HbbTV spec allows addressable advertising since the inception
- Many significant deployments already
- Enables Revenue growth thanks to higher CPM in addressable
- Broadcaster/Publisher  controlled
- 1 app = all TV brands
- Integrates with core programmatic / addressable technologies and systems ( VAST, SCTE, Google Ad Manager and other  leading adservers, …)
- Enables programmatic /CPM sales models for linear inventory

ATRESMEDIA

nova

SevenOne Media

RTL

TRT

TV8

GRUPPO MEDIASET PUBLITALIA '80

MEDIASETespaña.

…

WARNER BROS. DISCOVERY

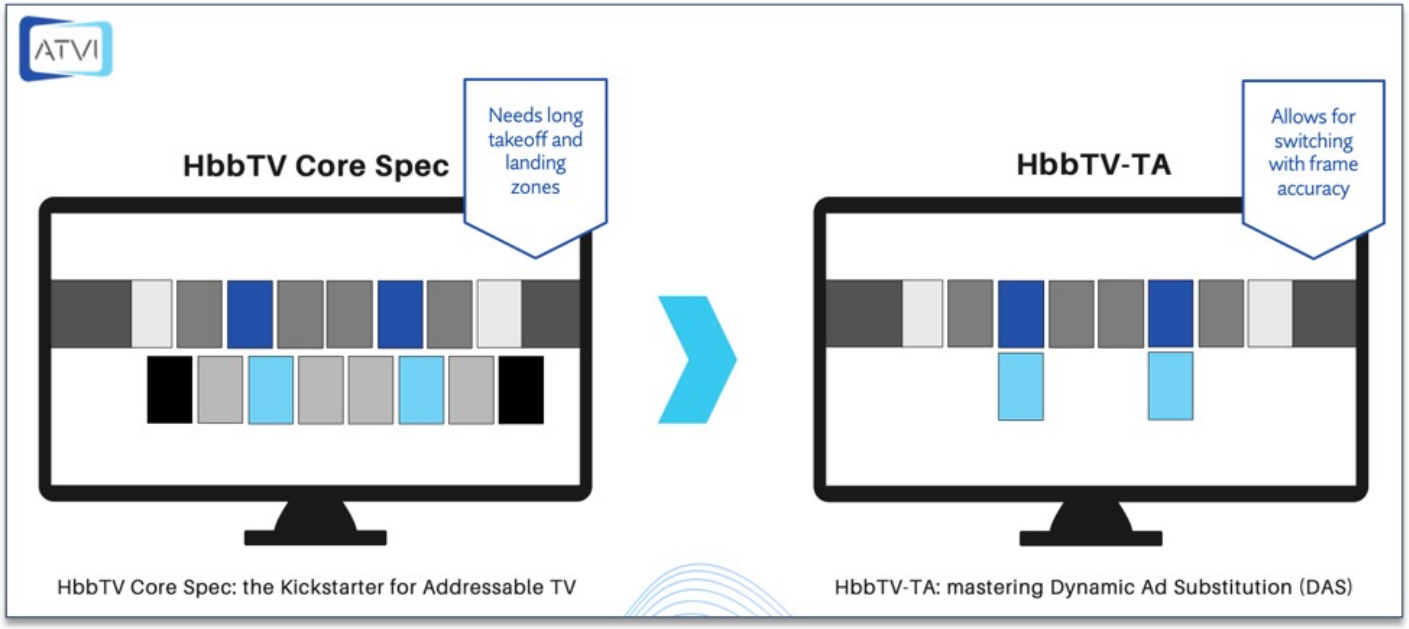
we do tv

… and many more across Europe and beyond

# Advanced version : HbbTV-TA

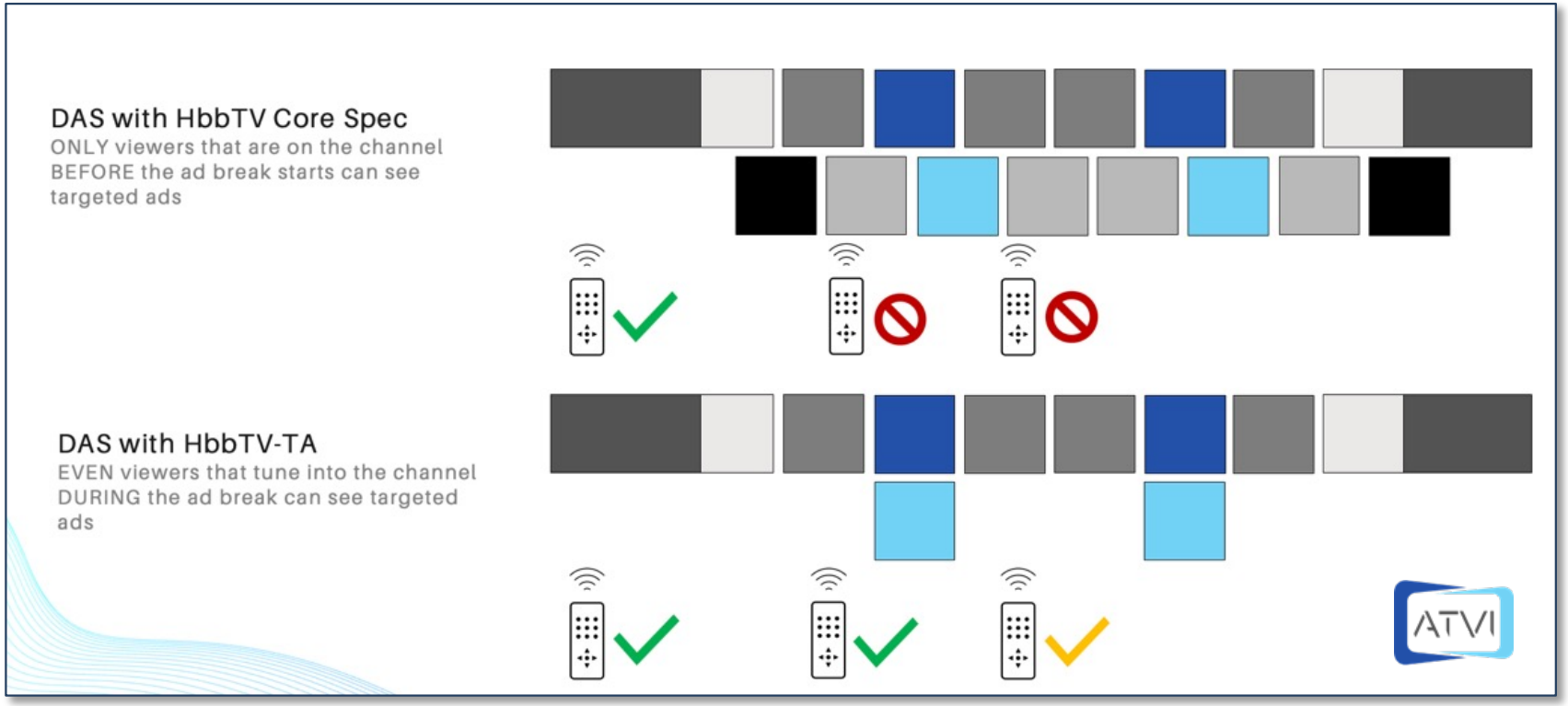
- frame accurate dynamic ad substitution
- Ad by ad vs full ad break replacement

  - Dedicated certification entity: ATVI
  - Already 4 large brands certified




Source : Addressable TV Initiative (ATVI)

# HbbTV-TA increases the number of billable ad impressions




Source : Addressable TV Initiative (ATVI)

# HbbTV delivers what advertisers expect from streaming

| Rank | Criterion | Importance (Average EU5) | HbbTV | HbbTV-TA |
|---|---|---|---|---|
| 1 | Quality of ad experience | ~41% | ** | *** |
| 2 | Audience reach available | ~38% | *** | * |
| 3 | Real-time analytics | ~36% | ** | ** |
| 4 | Advanced targeting options | ~36% | ** | ** |
| 5 | Interactive ad formats | ~32% | *** | *** |
| 6 | KPI-driven optimisation tools | ~30% | ** | ** |
| 7 | Depth of inventory offered (incl. linear TV) | ~29% | *** | *** |
| 8 | Programmatic buying | ~28% | ** | ** |
| 9 | Overall ROAS | ~28% | ** | ** |

**Legend:** * partially fulfilled. ** fulfilled – at par with CTV. *** completely fulfilled, potentially exceeding CTV)

*Adapted from "STREAMING TV UNCOVERED: A MARKETERS' SURVEY" - Comcast - 2025*

# Wrap-Up

- There is a major CTV addressable advertising opportunity for broadcasters
  1. Immediate / proven = BVOD = half of a growing 5.3 bn€ market
  2. Potential = introducing addressable in linear broadcast (25 bn€)
- CTV comes with two major challenges
  - Technical fragmentation
  - Walled gardens of CTV/OS makers
- HbbTV (with other open standards) helps Broadcaster build  success in CTV
  - Technical unification: one app for all TV sets; one app for all networks
  - Autonomy vis à vis walled gardens
  - Ad substitution in linear broadcast TV

# Thank You !

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