

# 10<sup>th</sup> HbbTV SYMPOSIUM & AWARDS Prague 2022

NOVEMBER 9<sup>th</sup> – 10<sup>th</sup>

National House of Vinohrady

The State of the (HbbTV) Nation

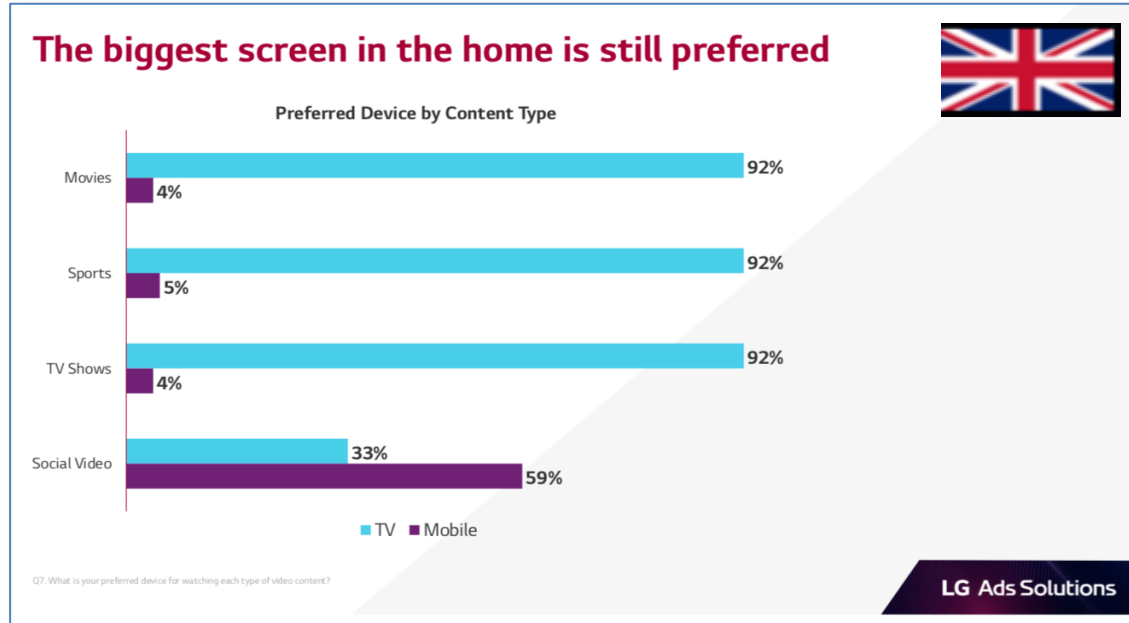


- I. Worth noting in our surrounding TV market
- II. Some Highlights of 2022 at HbbTV
- III. Looking forward : what to expect in 2023, and may be beyond

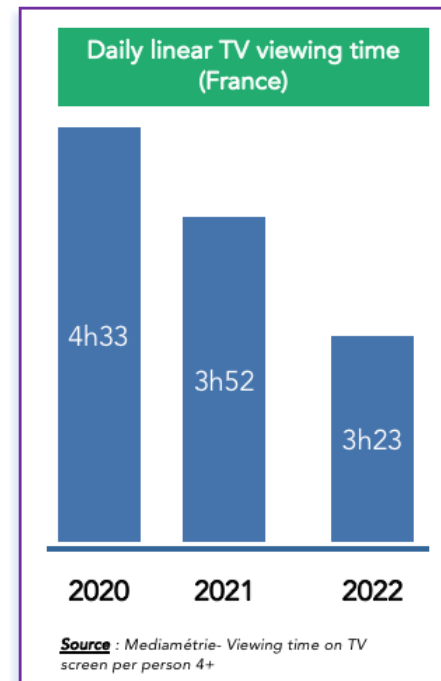
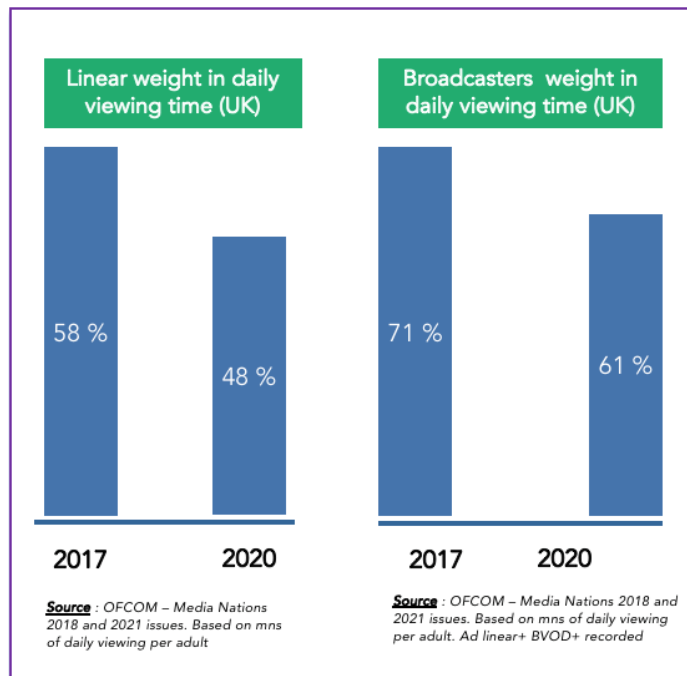
## I. Worth noting in our surrounding TV market in 2022

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# TV screen really matters



# TV watching continues to change (1)



# TV watching continues to change (2)

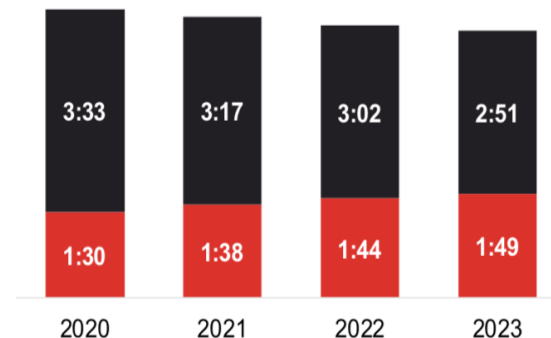


1. Netflix, 1.334 trillion minutes viewed
2. CBS, 752.8 billion
3. NBC, 596.7 billion
4. ABC, 471.9 billion
5. Fox, 323.1 billion
6. Disney+, 245.4 billion
7. Prime Video, 173.7 billion
8. Hulu, 128.1 billion
9. Apple TV+, 21.7 billion



Average Time Spent per Day with Media  
Hrs: Mins

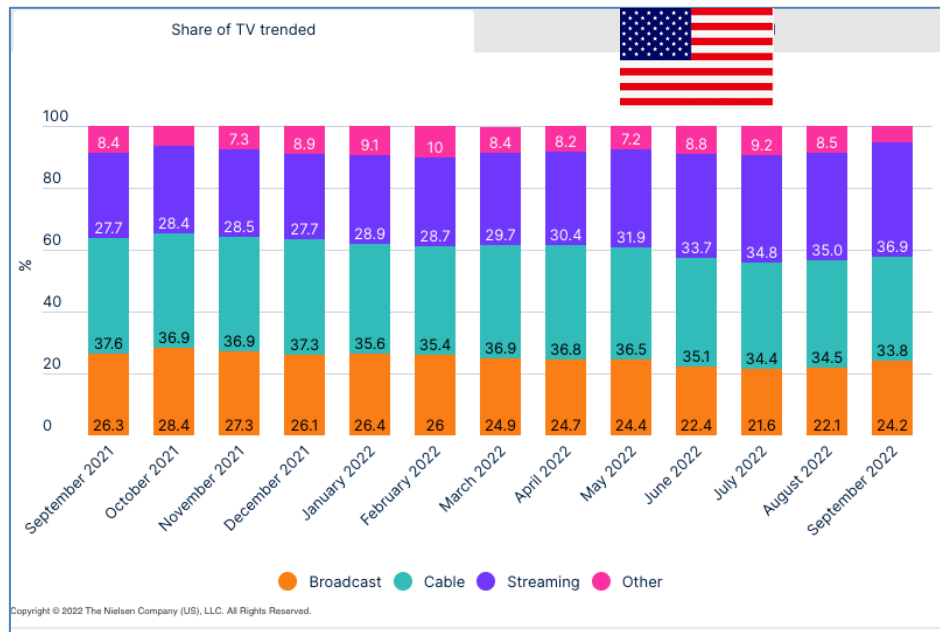
■ CTV ■ Linear TV



Source: eMarketer, January 2022

Source : Hollywood reporter - May 2022

# The rise of streaming continues



	July 2021	July 2022	YoY % Change
Broadcast	23.8 %	21.6 %	-9.8 %
Cable	37.7 %	34.4 %	-8.9 %
Streaming	28.3 %	34.8 %	+22.6 %

**Source :** Nielsen - The Gauge - September 2022

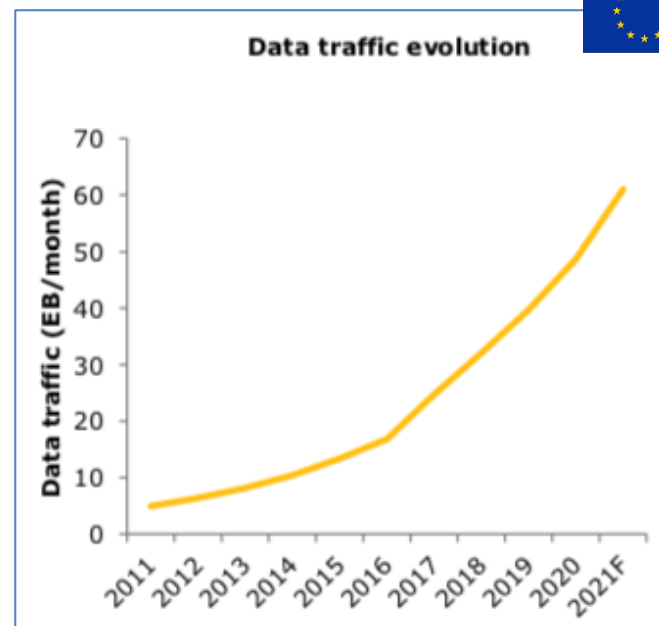
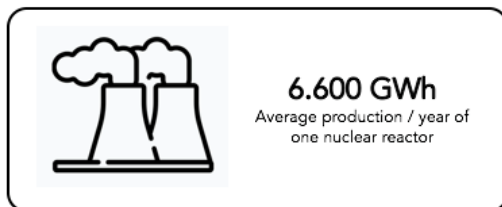
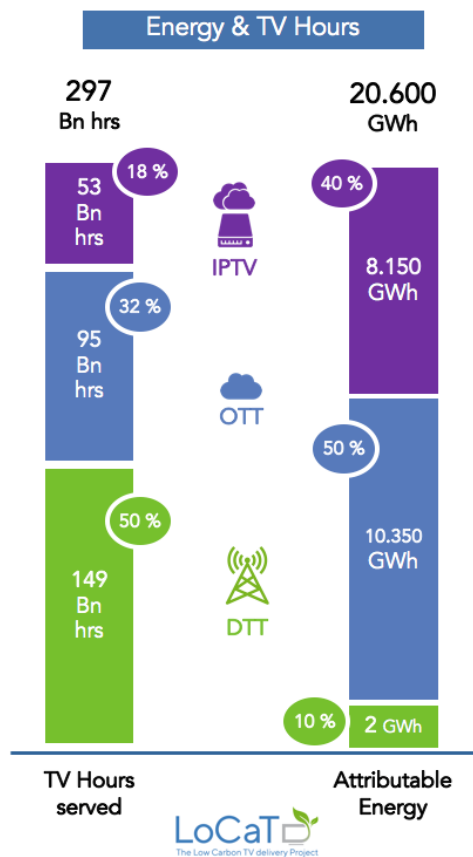
# There are different ways to bring streaming content to a TV screen



## IT'S NOT BUILT-IN OR PLUG IN: SMART TVs AND STREAMING MEDIA PLAYERS (SMPs) LIVE SIDE-BY-SIDE IN MANY HOMES

- Almost half of TV homes say they have both an enabled smart TV and an enabled SMP
- And over half of all enabled smart TVs are reported to have an SMP connected

# Growth of streaming may raise or face significant environmental challenges



Source : AXON for ETNO

... as well as network capacity and economic challenges

3 minute read · October 13, 2021 12:44 PM GMT+2 · Last Updated a year ago

## S.Korea broadband firm sues Netflix after traffic surge from 'Squid Game'

By Joyce Lee



Noticias Analisis | Globales | Internet & OTT | Regulation

Wednesday, May 04, 2022

## European operators claim € 20 billion per year from big tech companies to use networks

They presented a study proposing that Amazon, Google, Meta and Netflix contribute to a direct fund that will be used to pay part of network upgrade. Traffic caused by these technologies costs them up to € 28

## EU to consult on making Big Tech contribute to telco network costs

By Mathieu Rosemain and Foo Yun Chee



### Carr Joins European Officials to Promote Shared Infrastructure, National Security Goals

*Meeting with E.U. Officials on Big Tech Contributing a Fair Share, TikTok's Data Flows*

BRUSSELS, BELGIUM, September 26, 2022—FCC Commissioner Brendan Carr is joining European regulators and leaders in Brussels today and tomorrow. This morning, at a technology forum, Carr delivered keynote remarks on, one, the need for Big Tech to start contributing a fair share toward network builds and, two, the national security threats posed by TikTok. Carr's visit comes as E.U. officials are closely examining both of these issues. Over the next two days, Carr will be meeting with regulators from the European Commission, European Parliament, and state regulatory bodies, as well as other stakeholders.



# Streaming growth is not infinite either



## Swedish SVOD growth stalls



MAY 18, 2022 19:16 EUROPE/LONDON BY JULIAN CLOVER

MEDIAVISION



After years of strong growth the number of Swedish households subscribing to at least one paid video streaming service is static on 60%.

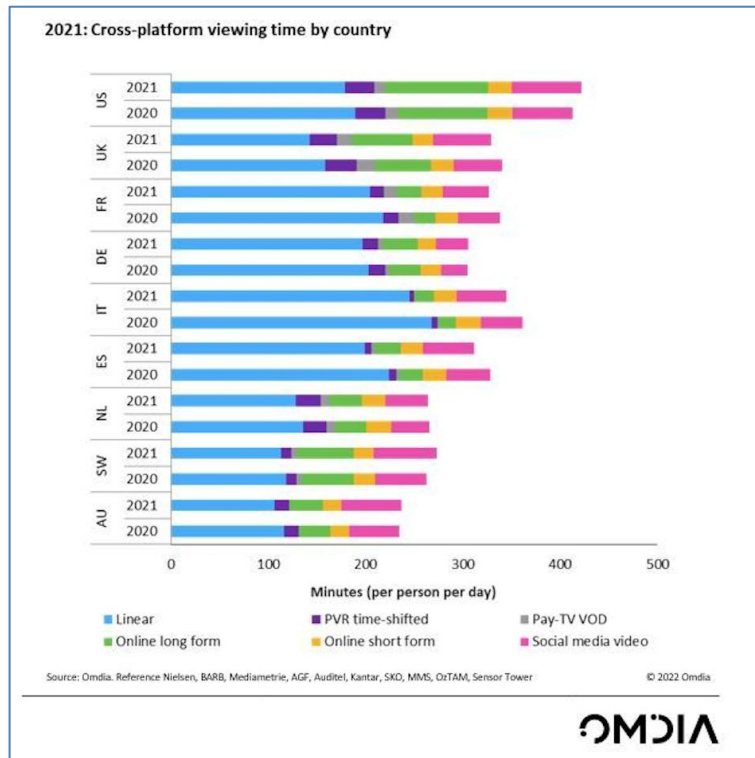
Stockholm-based consultancy Mediavision says the number of subscribing households has remained unchanged in the last 12 months. Growth in stacking – where subscribers take two or more streaming services – is also diminishing.

Mediavision analysis of the first quarter of 2022 shows that paid video streaming services, SVOD, was modest at just 4 per cent when comparing year over year and quarter over quarter. An average Swedish consumer is paying approximately SEK 220 per month, a modest increase on the year.

"For some time now, we have seen the Swedish market for SVOD services approaching maturity and during Q1 2022, the signs have become increasingly obvious, says Marie Nilsson, CEO of Mediavision. "Several players are now speaking about shifting strategies, and ad-funded services are expected to boost in the coming years."

Nilsson cites plans by both Disney and Netflix to add paid tiers as the next potential disruption to the market, adding that this week's launch of Pluto TV in the Nordics will also spur development.

# Linear TV still dominates, in all markets



# OTT is a growing big business , but still half of classical TV

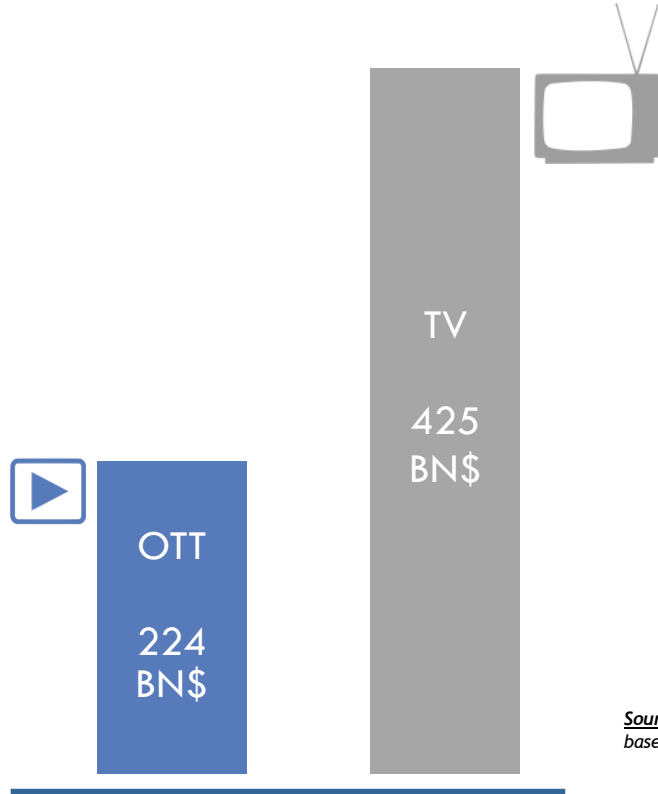


**RAPIDTVNews**  
media smart business ready

## OTT TV, films to generate \$224BN by 2027

Editor | 23 May 2022

Jumping \$89 billion in the forecast period, with about \$21 billion to be added in 2022 alone, global revenues from OTT TV episode and movies are set to grow from \$135 billion at the end of 2021 to reach \$224 billion in 2027 says a study from Digital TV Research.



Source : Global figures - TV market estimate by BMV based on IDATE 2019 figures for Europe, NA and Asia

# The TV Disrupter is now itself disrupted ?



## **Après la télé, les jeunes délaissent déjà Netflix, Disney+ et autres Amazon Prime**

Par Caroline Sallé

Publié le 16/10/2022 à 19:29, mis à jour le 17/10/2022 à 09:24

**British Teenagers Prefer TikTok Over TV, While YouTube Dominates American Teenage Users**

# Streaming is changing



## FINANCIAL TIMES

### Netflix to launch ad-supported streaming option in November

Cheaper \$6.99 monthly price marks reversal of longstanding opposition to advertising

[HOME](#) · [MOVIES & TV](#) · [NEWS](#)

### Netflix looking at livestreaming certain shows



By Trevor Mogg

May 15, 2022

SHARE

Netflix is exploring the idea of livestreaming a range of content, a recent report claimed.

Up to now the company has steered clear of livestreaming, but a report by entertainment website [Deadline](#) said Netflix is looking into the idea of deploying the capability for a "swathe of unscripted shows and stand-up specials."

# 2022 : Different streaming

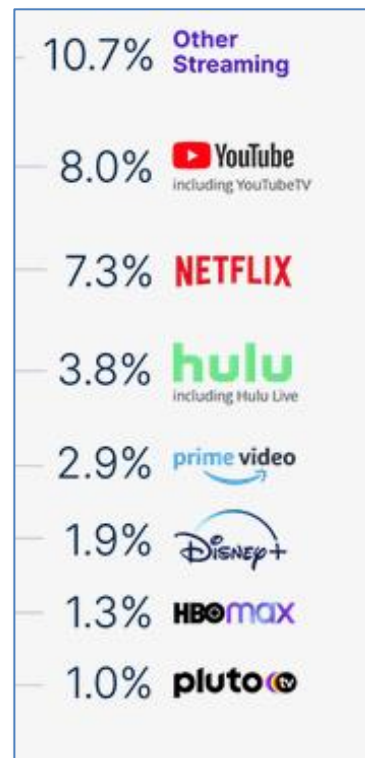


[Home](#) > [News](#) > [Business](#)

## Nielsen: YouTube Becomes Top Streaming Platform, Beating Netflix for the First Time

By [George Winslow](#) published 13 days ago

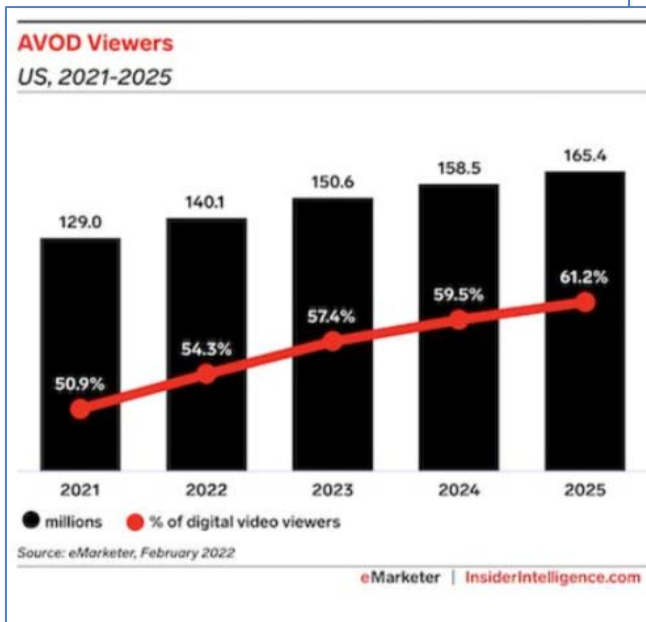
Sports boosted the broadcast share of TV viewing in September, according to Nielsen's latest report from The Gauge



# Streaming : from SVOD to FAST



Source : LG Ads solution - Oct 2022



## Global AVOD spend to more than double over next five years

Joseph O'Halloran | 09 May 2022

Advertising video-on-demand (AVOD) revenues for TV series and movies are set to reach \$70 billion in 2027, up from \$33 billion in 2021, says a study from Digital TV Research, with 3 of 138 countries surveyed set to generate more than \$1 billion in 2027, up from only five in 2021.



In terms of territories, the Global AVOD Forecasts report forecast that the US would grow by \$19 billion to \$31 billion by 2027 remaining the largest country by far. Digital TV Research added that the US had the world's most sophisticated advertising industry by some distance, plus AVOD choice was greater in the US than anywhere else. In all, the US was projected to account for 46% of the global total by 2027, up from

# Markets aspires for open ecosystems



- 1. Watching TV on a TV screen remains important**
- 2. TV watching is changing, with always more and more streaming**
- 3. More than one way to bring streaming content to a TV screen**
- 4. Linear / broadcast TV is not dead and remains bigger than streaming in usage and in value**
- 5. Growth of streaming may be close to face significant economic and energy/environment questions**
- 6. Streaming is changing**
- 7. Aspiration of markets for openness , avoiding closed gatekeeping situations**

# So What ?



- **Confirmation of hybrid TV landscape**
  - On-demand mixed with linear on the TV set ( and in OTT offers)
  - Streaming delivery ( even for live) mixed with broadcast delivery
- **Co-leadership of classical broadcast TV and OTT/streaming**
- **Fragmentation of streaming**
- > **HbbTV is the right technology to navigate this hybrid world**
  - Bring OTT-style experiences on TV sets
  - Seamless end-user experience , which ever the source/network
  - Keep the (green) broadcast option alive and leverage it
  - Open standard aligns with market aspirations for open ecosystems

## **II. Some Highlights of 2022 at HbbTV**

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ADB + TA (indep.) : January 2022

ETSI TS 103 464 V1.3.1 (2022-01)



**Hybrid Broadcast Broadband TV;  
Application Discovery over Broadband**

## New Ref App with enhanced DRM support

### HbbTV expands DASH DRM Reference Application with multiperiod DASH and SL3000 tests

**Geneva, June 20, 2022** – The HbbTV Association, a global initiative dedicated to providing open standards for the delivery of advanced interactive TV services through broadcast and broadband networks for connected TV sets and set-top boxes, is pleased to announce a significant addition to its DASH DRM Reference Application – multiperiod DASH (as may result from server-side Ad Insertion (SSAI)) and PlayReady SL3000 as is being required more and more by US content providers.

## Test Suite 2022-2

### HbbTV releases Version 2022-2 of the HbbTV Conformance Test Suite

**Geneva, August 25, 2022** – The HbbTV Association, a global initiative dedicated to providing open standards for the delivery of advanced interactive TV services through broadcast and broadband networks for connected TV sets and set-top boxes, is pleased to announce the release of a new version of the HbbTV Conformance Test Suite.

The new version, developed by the HbbTV Testing Group, is called v2022-2; it is the second major release of the Test Suite in 2022. The release contains a total of 3,000 test cases, including a mixture of tests that have been approved for the first time, and tests that were updated after feedback from users of the Test Suite.

# Test suite continues to grow

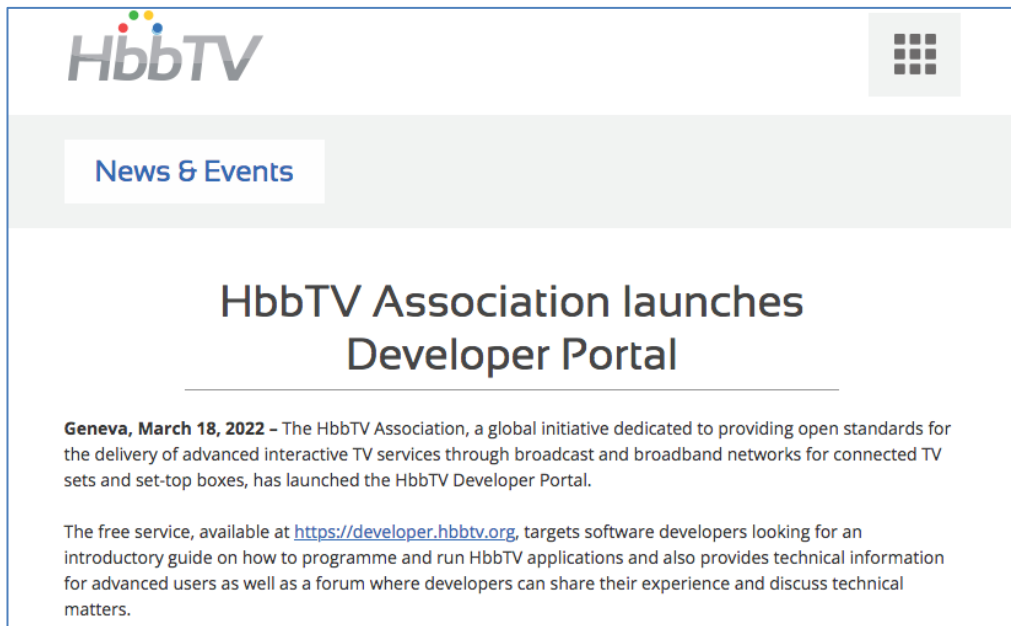


## Test suite progress



Name	Approved size	% approved	Total size	Total size with Nordig & OIPF B	Date
v8.0	632	65%	966	966	31.07.2015
v8.1	731	76%	965	965	11.02.2016
v8.5	770	50%	1548	1548	31.08.2016
v9.0	1092	72%	1521	1715	31.10.2016
v9.1	1221	79%	1538	1791	16.01.2017
v9.2	1474	77%	1908	2102	20.07.2017
v9.2.1	1500	78%	1916	2110	17.11.2017
v2018-1	1674	87%	1924	2118	23.03.2018
v2018-2	1639	84%	1952	2146	04.07.2018
v2018-3	1644	84%	1951	2146	11.11.2018
v2019-1	1691	81%	2079	2274	15.03.2019
v2019-2	1677	75%	2239	2434	23.07.2019
v2019-3	1751	76%	2297	2492	12.11.2019
v2020-1	1879	79%	2391	2586	11.03.2020
v2020-2	2037	79%	2564	2759	13.07.2020
v2020-3	1929	73%	2626	2821	16.11.2020
v2021-1	2029	73%	2768	2963	26.03.2021
v2021-2	2202	79%	2799	3000	13.07.2021
v2021-3	2202	79%	2796	2997	17.11.2021
v2022-1	2263	81%	2801	3002	11.3.2022
v2022-2	2304	82%	2799	3000	14.7.2022





The screenshot shows a webpage header with the HbbTV logo and a grid icon. Below the header is a 'News & Events' section. The main headline reads 'HbbTV Association launches Developer Portal'. The text below the headline states that the HbbTV Association, a global initiative dedicated to providing open standards for the delivery of advanced interactive TV services through broadcast and broadband networks for connected TV sets and set-top boxes, has launched the HbbTV Developer Portal. It further explains that the free service, available at <https://developer.hbbtv.org>, targets software developers looking for an introductory guide on how to programme and run HbbTV applications and also provides technical information for advanced users as well as a forum where developers can share their experience and discuss technical matters.

**HbbTV**

News & Events

## HbbTV Association launches Developer Portal

**Geneva, March 18, 2022** – The HbbTV Association, a global initiative dedicated to providing open standards for the delivery of advanced interactive TV services through broadcast and broadband networks for connected TV sets and set-top boxes, has launched the HbbTV Developer Portal.

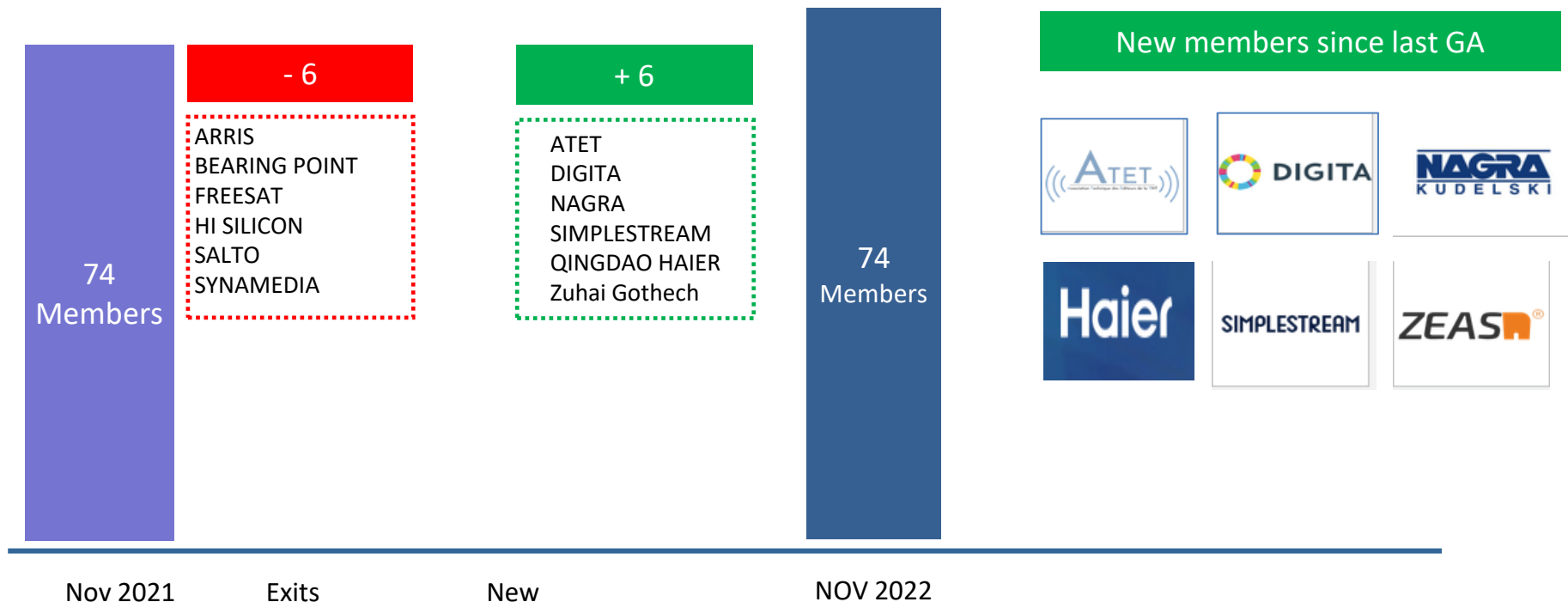
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# A flow of new initiatives in the ecosystem to facilitate HbbTV deployments



**OBS ANNOUNCES THE LAUNCH OF THE OPEN RED BUTTON PROJECT**

# Our Membership in 2022



# New Steering Group elected with 3 new companies

The new SG was elected by the members of the HbbTV Association at the General Assembly on May 17, 2022.

The new SG comprises the following members:

- BBC: Chris Poole
- Cellnex Telecom: Xavier Redon
- Digital UK: James Jackson
- EBU: Peter MacAvock
- Eutelsat: Vincent Grivet
- Kineton: Angelo Pettazzi
- LG Electronics: Stuart Savage
- Panasonic: Martin Faehnrich
- RAI: Luca Barboni
- RTI: Fabio Guarnaccia
- RTL: Frank Heineberg
- Samsung: John Adam
- Sony Europe: Nigel Moore
- Tivù: Daniele Novaga
- TP Vision: Jon Piesing
- Vewd Software: Frode Hernes



### **III. Looking forward : what to expect in 2023, and may be beyond**

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# Key stakes in 2023



- **Continue the normal operations** : tests, webinars,
  - 2.0.4 publication ;
  - DRM indep. spec
  - New PMO
- .. And more

## Some take-aways by the SG from Paris Symposium



1. HbbTV very important to Broadcasters / Content providers transformation strategies : meet their desire for direct end-user relation ; no gatekeeping ; one app for all platforms
2. users (=Broadcasters + service providers) happy with the specification: no real "ask" to change the specification
3. tech vendors start to invest and propose "development frameworks" or "ready made HbbTV building blocks"
4. targeted advertising ( with or without TA) is now for real

### **BUT we heard some "frustration" or un-met expectations when it comes to**

1. do we really need the country variations ( profiles) ? un-justified fragmentation
2. industrial deployment : not as smooth as expected (dreamed ?) because of significant compatibility/conformance / QA challenges

- SG abundantly discussed the Paris 2021 findings in late 2021 early 2022
- the DRM topic was directly engaged and decided at Barcelona SG ( April 2022): now has its own dynamic ( Spec WG, leading to an indep spec)
- A stock of an other 12 possible change ideas was identified and discussed at SG
- During October SG , SG selected 5 potential change ideas which appeared as having a good relevance/feasibility profile
- SG decided to push these ideas, making sure the broader HbbTV membership could be involved to shape them ( planning phase) and contribute to their implementation
- This will be achieved by starting 5 “ Study Mission Groups” ( SMGs) where interested members are welcome

# The 5+1 SMGs to be started



## SMG 1: Boosted Interop Process

[HbbTV Association would define and operate a boosted process to detect, list and proactively chase interop issues; likely to involve paid professional resources for management and / or issues spotting , away from traditional pure “voluntary work” ]

## SMG 2 : Boosted Test Suite

[ HbbTV Association would define substantially more ambitious targets for the test suite (e.g.; speed at which we can integrate reliable tests) and organize to meet them; likely to involve extra costs for management of tests QA etc. ]

## SMG 3 : Ref App - Open Source library

[HbbTV Association would create and manage a library of relevant ref apps and open source code ; could also involve a direct or crowd funding effort to continuously extend the library ]

# The 5+1 SMGs to be started



## SMG 4: Pro-active European/International Alignment

[HbbTV Association would deploy pro-active action to better align future deployments of HbbTV apps and services in each national market. An ambition would be to avoid significant differences in the app and stream technologies utilised by new apps and services. This might be achieved via a combination of: simplification of the spec, explicit guidelines to app developers, or profiling of a future unification spec.]

## SMG 5 : The E-Zoo Program (TVs and Apps)

[HbbTV Association would facilitate the cataloguing of, and (remote) access to, the various “zoos” of TV and apps in Europe to enable easier ( and remote) testing of Apps on TVs

## SMG 6 : New Funds

[HbbTV Association will explore ways to obtain new funds to secure an improved level of service to the ecosystem, including to implement the change ideas as shaped by the SMGs ; may include EU and other subsidies, donations, members, ..

# What's next ?



- SMGs will soon be officially started ( 2 out of the 5 ideas have already an identified “formator”)
  - **All Members invited to join in all SMGs**
  - If you are not a Member, become one !
  - Bring your ideas and contributions
  - SMGs are expected to bring conclusions = a plan to implement ( or not) the idea in the first half of 2023
  - Implementation(s) may start in second half of 2023
- BUT** : ability of Association to implement is totally dependant on
- Voluntary contributions ( in labour) of members
  - New financial resources = subsidies, donations or memberships

You are HbbTV and HbbTV is you !

- The world of TV remains a dynamic and attractive one
- Continues to change, with more streaming
- Towards a balanced co-leadership of classical broadcast TV and OTT streaming TV
- Market aspire to openness and to mitigate gatekeeping situations
- HbbTV specifications very fit to serve these requirements
- HbbTV Association continues to deliver specifications and tests meeting the needs of consumers, broadcasters and manufacturers
- A working and lively association with a sound balance of continuity and renewal
- Some areas of improvements identified, and work started to adapt

We will keep going with you and for you !

Thank you !