

# Global TV Market Review— November 2021

**Paul Gray**

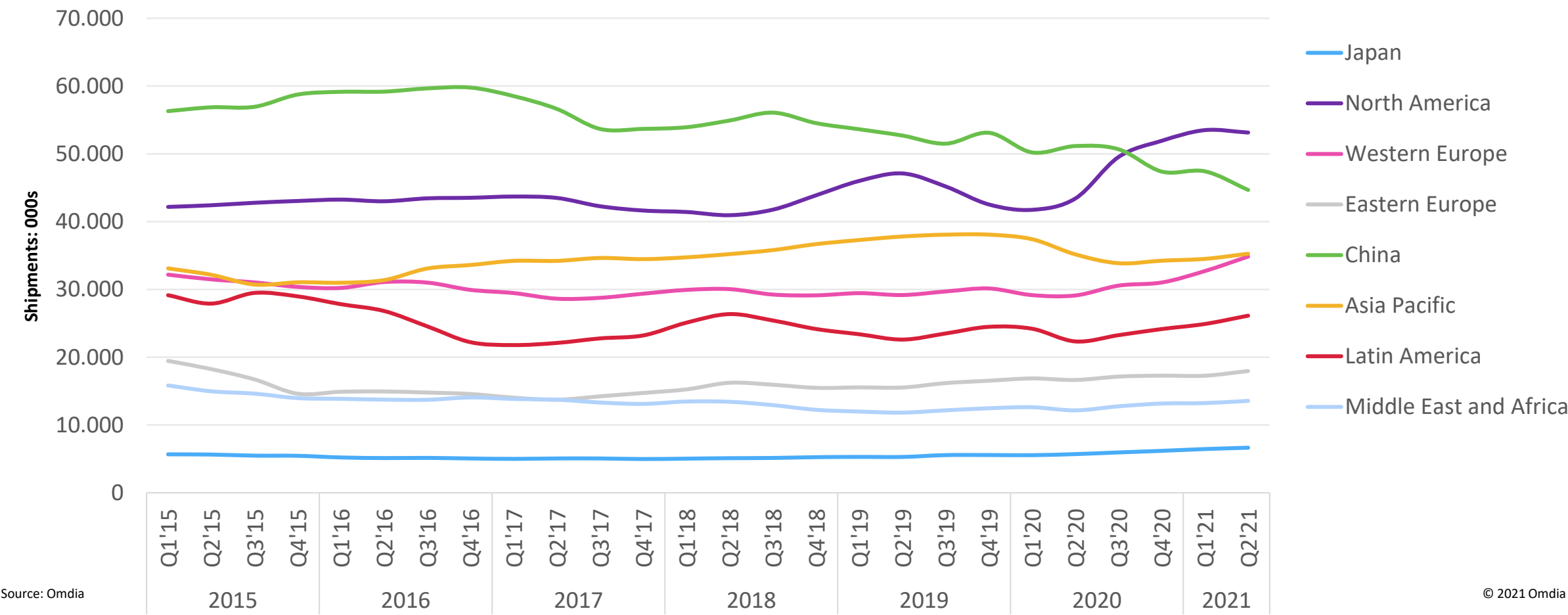
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# TV shipment history to Q2'21

TV shipment history (rolling four quarters)

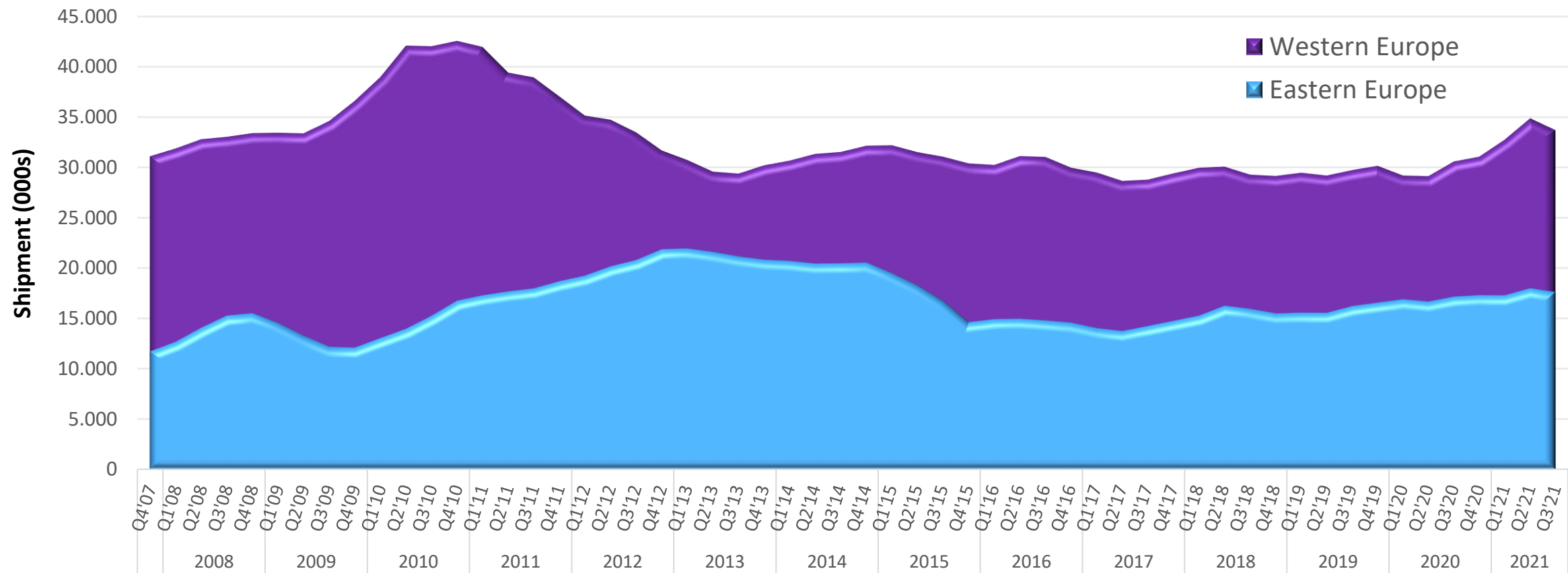


Source: Omdia

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# European TV market over the pandemic

TV Shipment history, annualized.

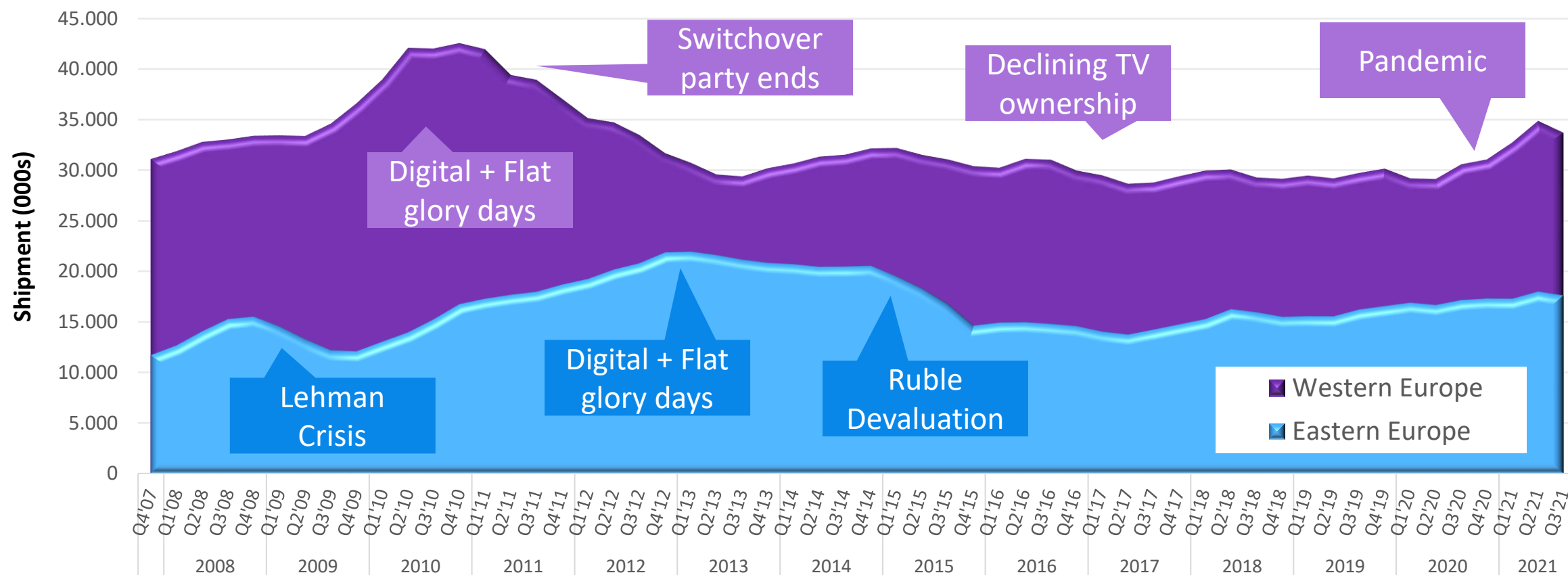


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# European TV market over the pandemic

TV Shipment history, annualized.

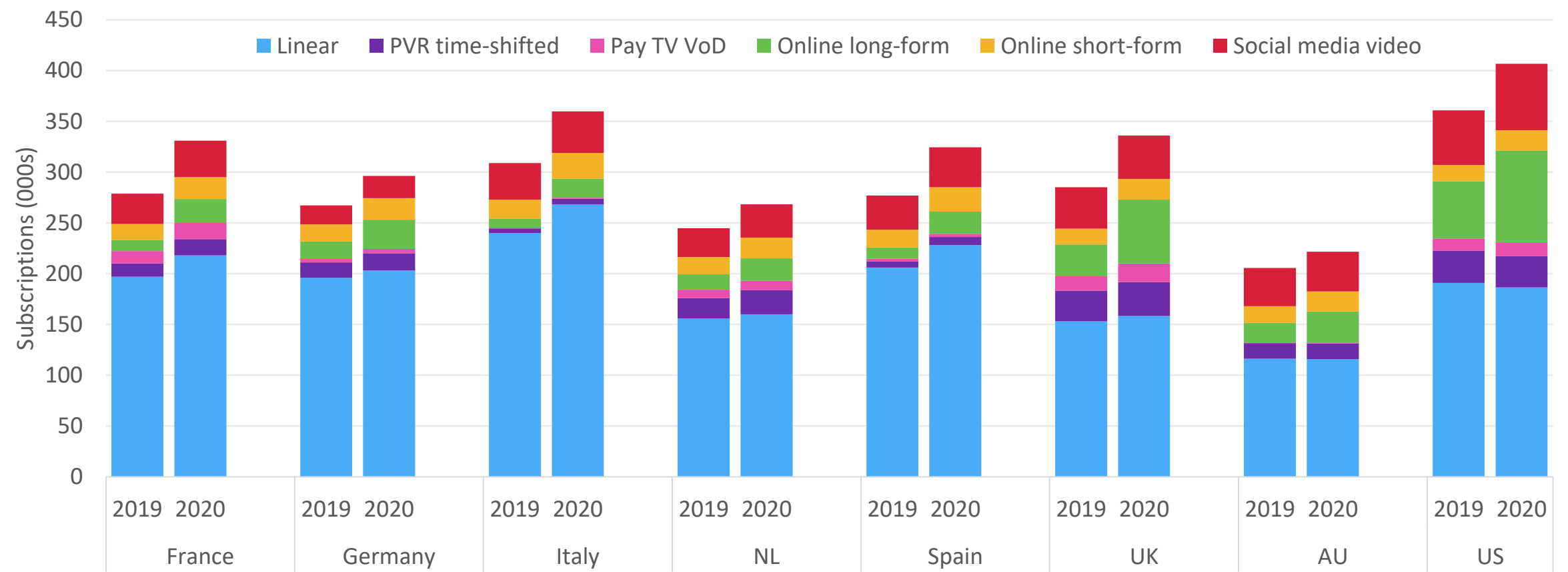


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# Sharp growth in TV viewing over the pandemic

TV Viewing hours 2020 v. 2019

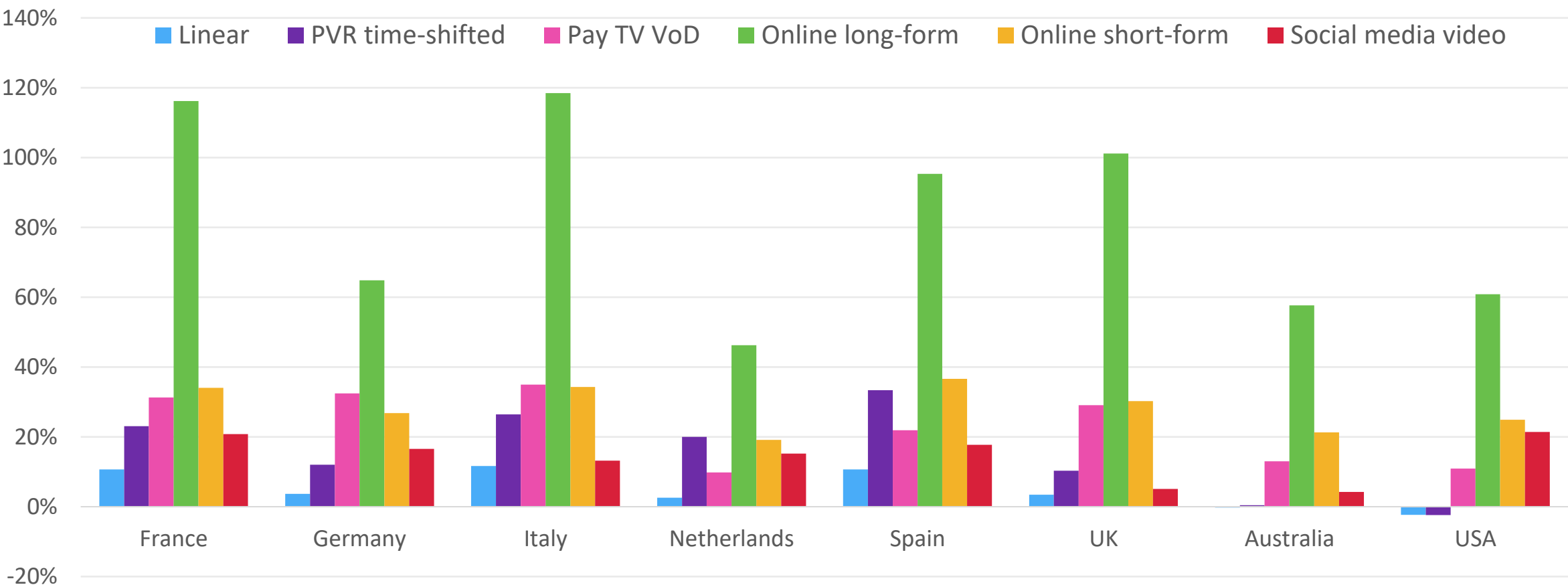


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# Linear TV generally firm; online was big growth story

Viewing hours growth 2020 v. 2019

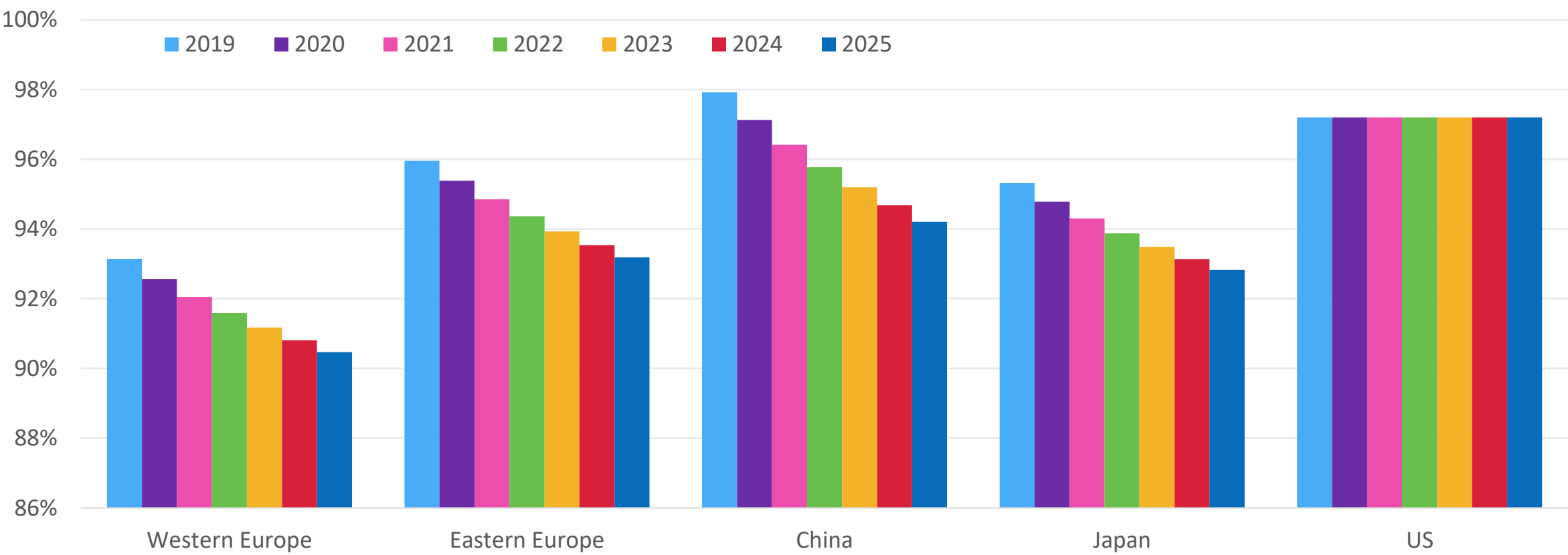


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# TV household share

TV Household Share forecast



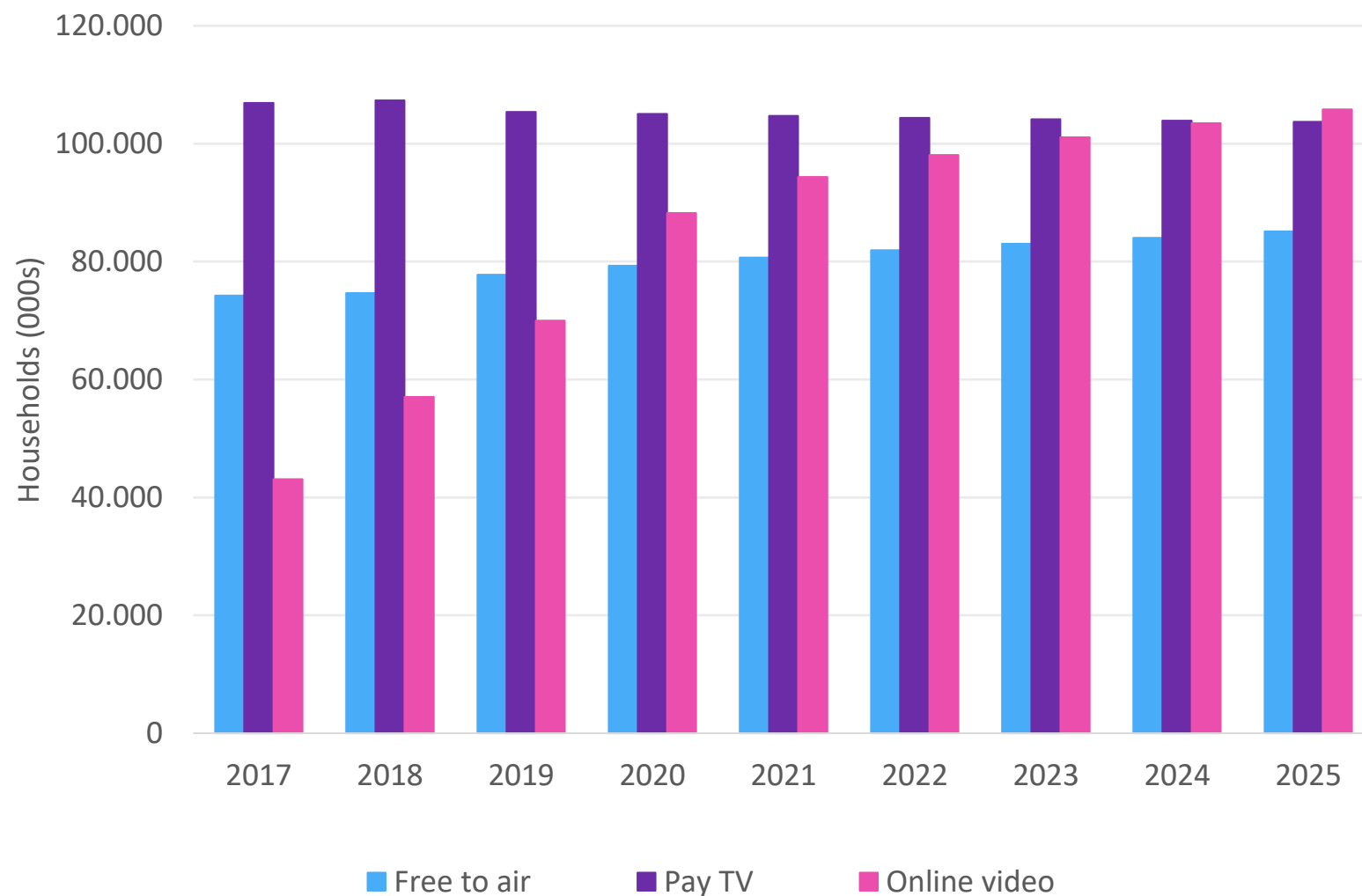
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# Rise of the streamers

- Streaming bridges UHD gap
- Consumer familiarity with streaming:
  - Automatic access to UHD,
  - no conscious decision

How European Households Watch TV



Source: Omdia

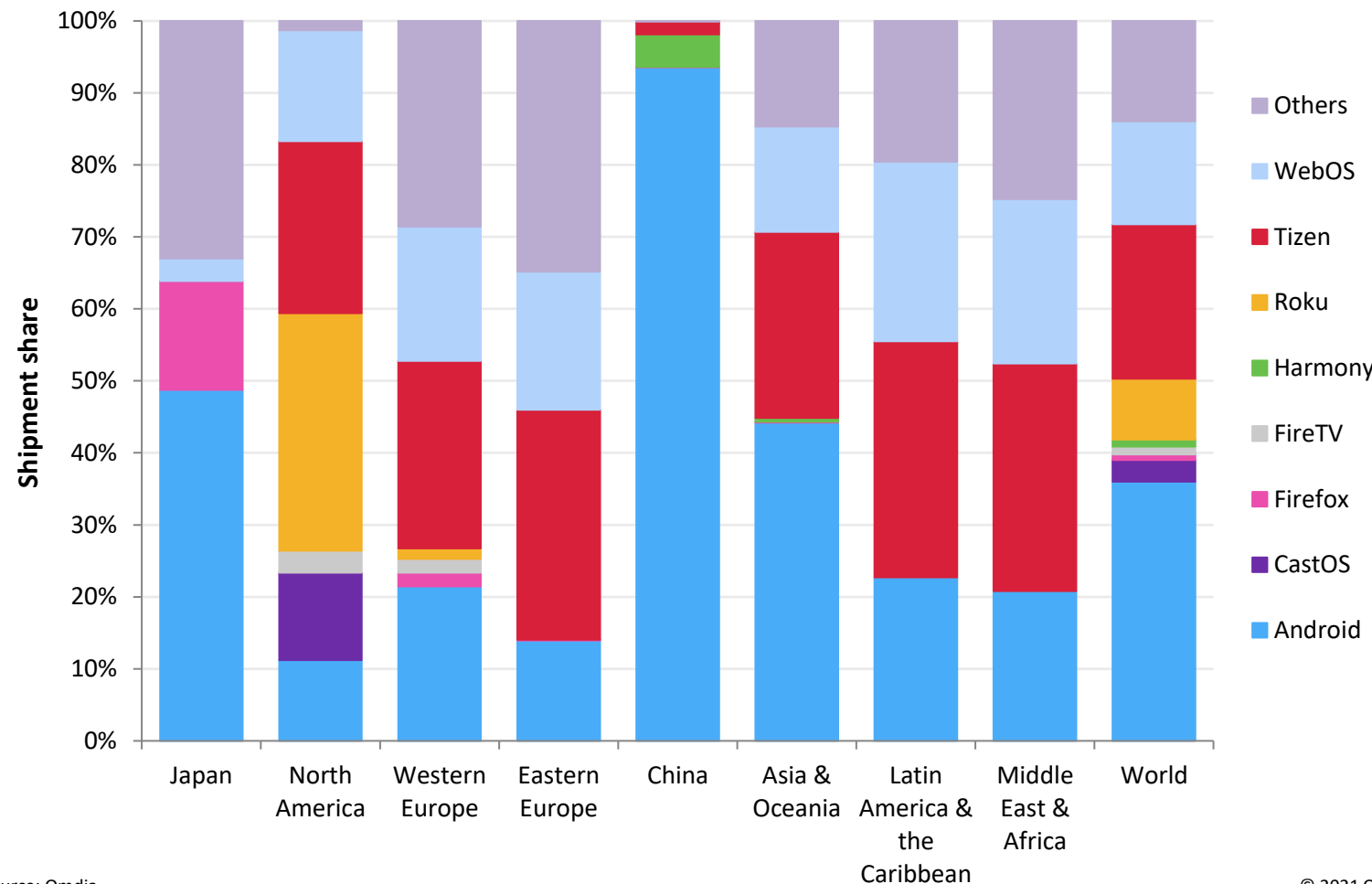
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# Smart TV platform share, 2Q21

- 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.

Smart TV OS platform share by region



Source: Omdia

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# 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

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Amazon FireTV Omni



Note: Subscriptions may be required  
Source: Amazon

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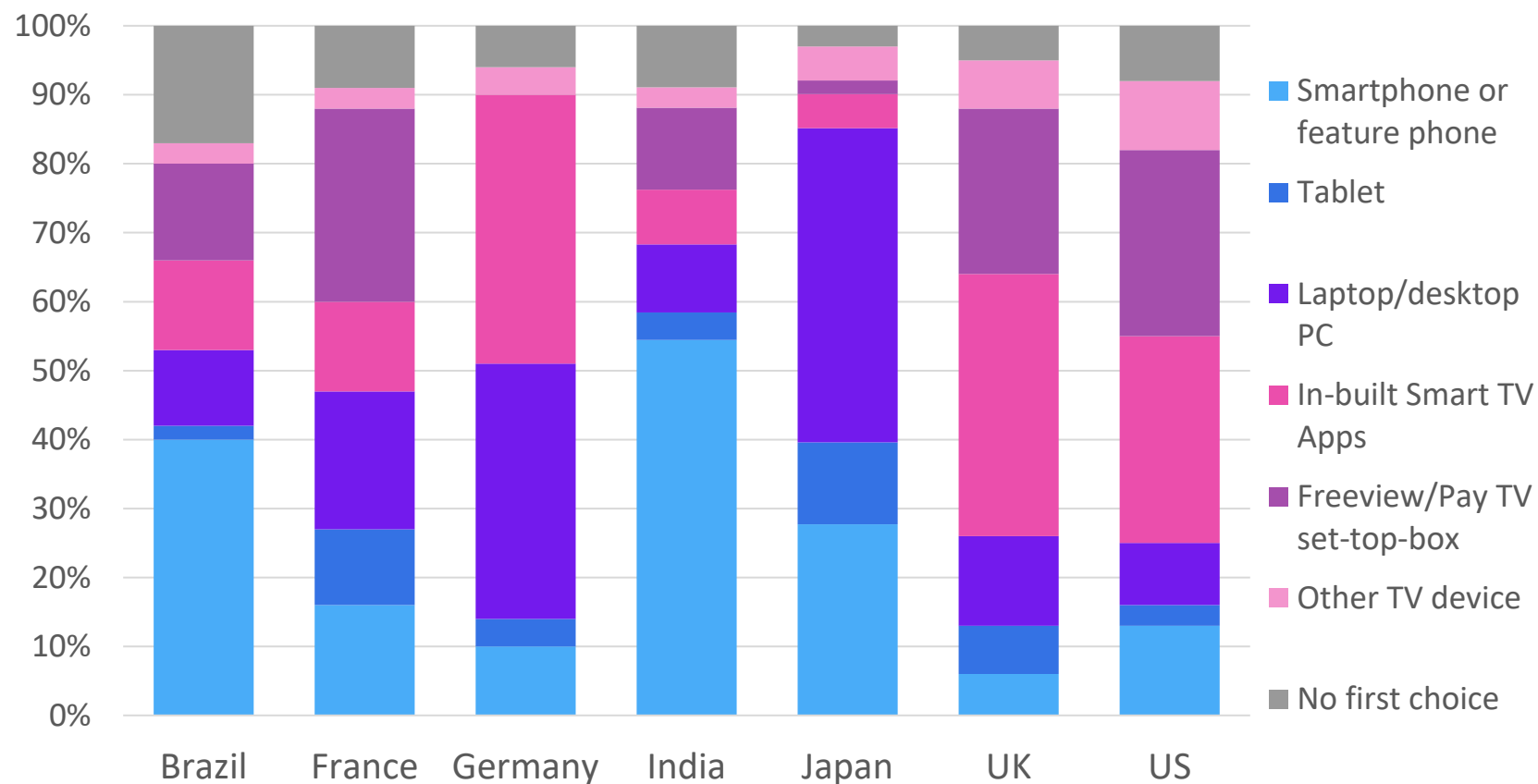
# Battle to be front of the queue



# What do consumers want?

# Preferred device for free (Ad-supported) VOD consumption

First choice device for AVOD services



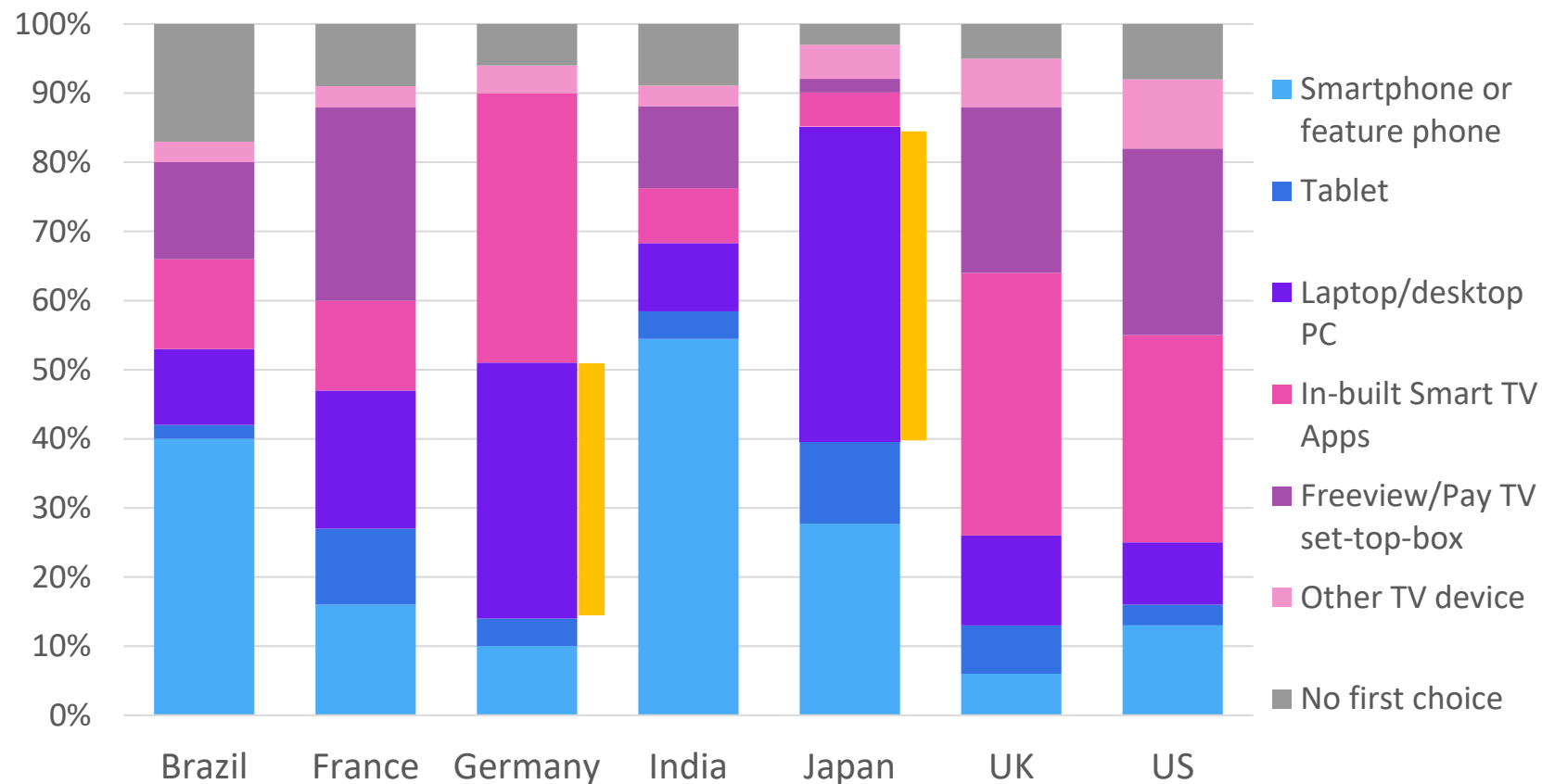
- Emerging markets more phone-centric
  - Helped by incredible free data in India
  - Smartphone the Swiss Army knife of modern living.

Notes: Percentage of consumers that select an AVOD service as their first choice, excludes YouTube.  
 OMDIA Consumer Research: Devices, Media & Usage Spotlight, November 2020.

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# High PC usage corresponds to declining TV households

## First choice device for AVOD services



- 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.  
OMDIA Consumer Research: Devices, Media & Usage Spotlight, November 2020.

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# Streaming bridging to new broadcast technologies

## Original vision of UHD



## Today's UHD roadmap



# 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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