

Freeview Play



November 2019.

Strictly private and confidential

Who we are



Digital UK leads development of Freeview, working with world-leading companies to deliver television which informs, educates and entertains.

Freeview Play brings terrestrial TV, catch-up and on-demand together in next generation televisions and boxes from leading manufacturers.



DTV Services Ltd, known as Freeview, owns the Freeview brand.

The company leads on consumer and retail marketing. Working closely with Digital UK, it also grants trademark licences to Freeview Play device, content and retail partners.

Working together to create the world's best free TV service



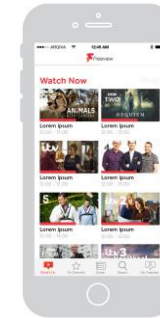
Freeview and Freeview Play



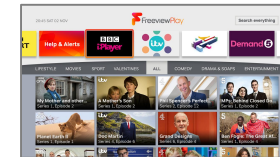
- Launched in 2002
- 70+ SD channels and 15 HD channels
- Delivered over DTT – universal coverage, open transmissions
- Received by any TV or STB connected to a TV aerial
- Used in 18m UK homes, and on 10.1m primary TV sets (Q2 2019)



- Launched in 2015
- Freeview channels + OD content from a growing number FTA broadcasters
- Hybrid delivery, DTT and broadband
- Works with any ISP
- Built into a wide range of compatible Smart TV and boxes
- 5m active devices (Sept 2019)



- Mobile app on iOS + Android

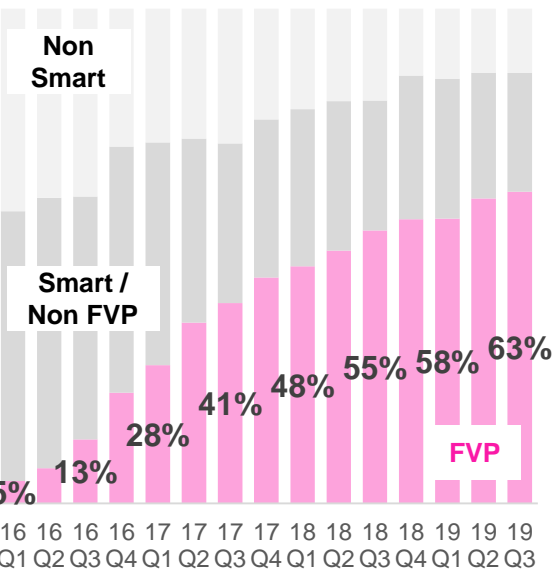


- Content discovery and service information app on TVs

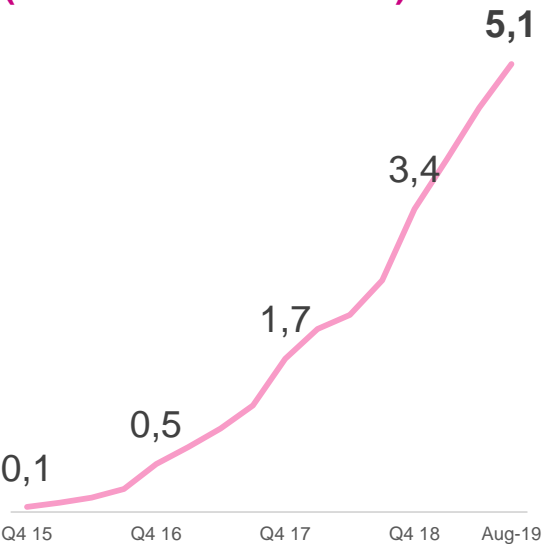


Freeview continues to be successful in connecting the best free to air content with UK viewers...

% of TV device retail sales

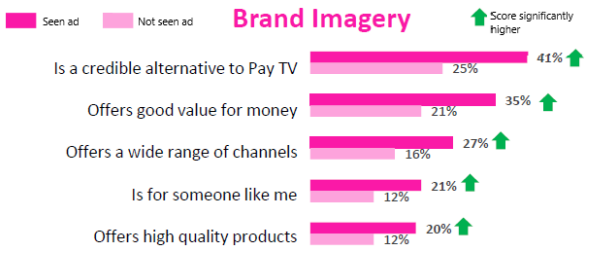
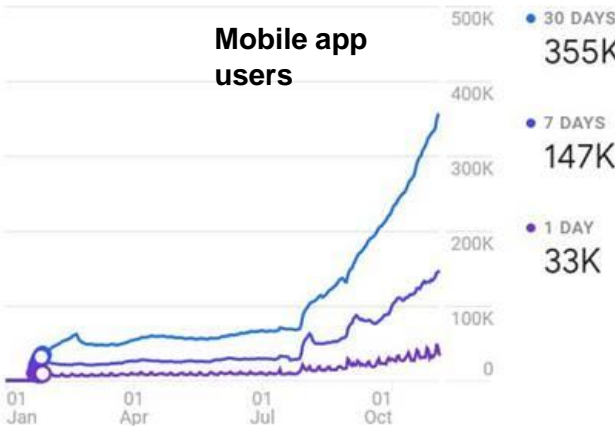


Active FVP devices (connected and in use)



Ratings and Reviews

4.6 out of 5
3.2K Ratings



FVP share of sales is still increasing

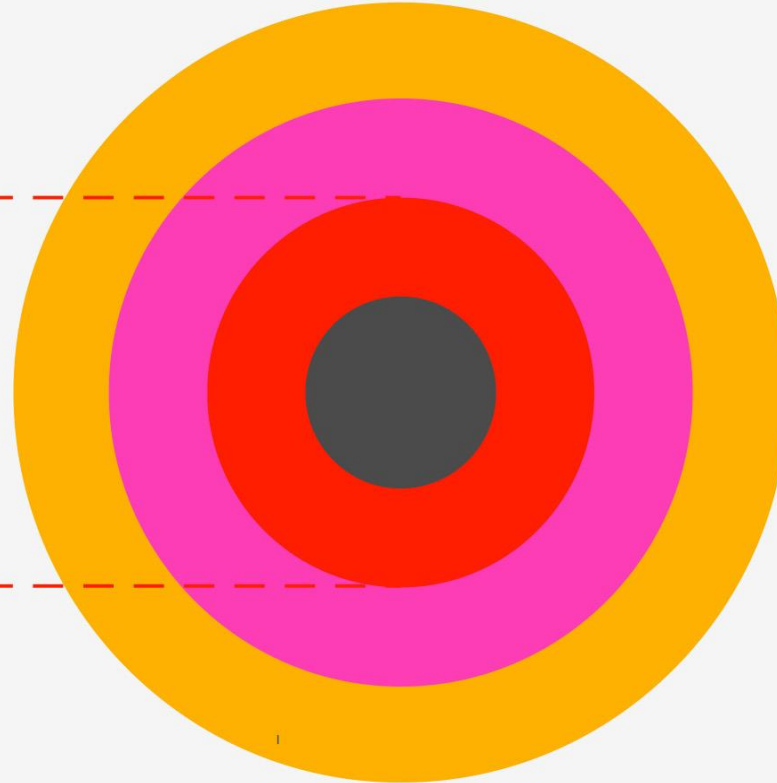
FVP active users have topped 5m

150k users are already using our Mobile App weekly

Our brand equity with viewers and industry remains very high

For consumers: 'foundation TV' for savvy viewers who value choice and flexibility

Wider Smart TV ecosystem:



Free to air broadcast channels at the hub of TV viewing



Free TV catch up and on demand



Broadcasters' OTT plays
eg Britbox, Now TV, Eurosport Player

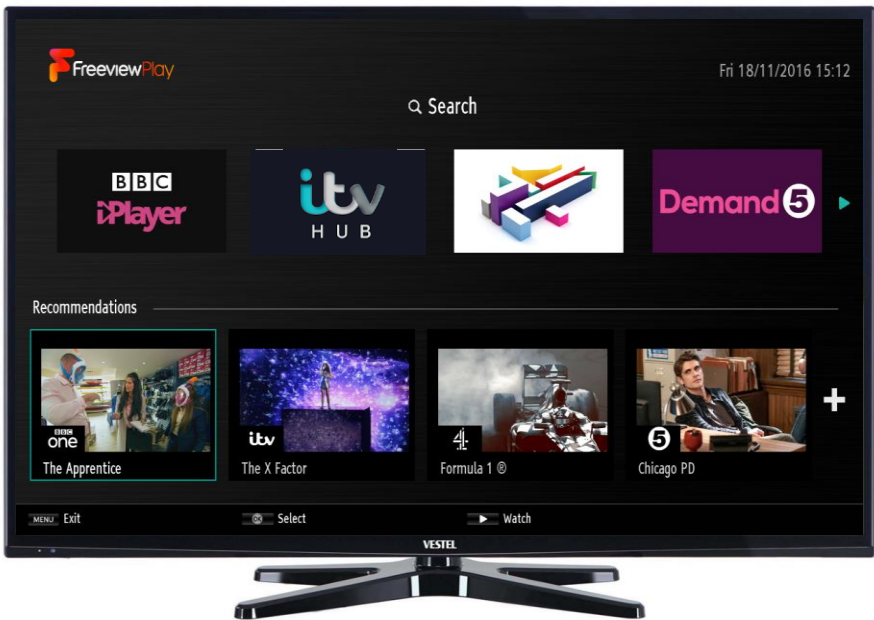


Pure OTT / SVOD e.g. Netflix, Amazon,

For broadcasters: Freeview Play cements prominence for free to air broadcasters through OEM partnerships



We set rules and specifications around the behaviour of live discovery, and power on demand discovery through backwards EPGs with our metadata.



And we support the distribution and onboarding of some of the UKs most popular on demand applications, ensuring they receive collective prominence under the Freeview Play brand.



Continued success of television needs to be competitive and collaborative

Competition between broadcasters



- The broadcasters who collaborate together to support Freeview Play are in direct competition for viewers and (other than the BBC) advertising revenues.
- Total Freeview broadcast TV channel revenues from all platforms (including pay TV) are close to £7bn per annum.
- Fierce competition is inevitable and drives value for all consumers.

Competition between manufacturers



- 5+ million TVs and 500k retail STBs (including PVRs) sell each year in the UK.
- The UK remains the 2nd largest market in Europe for CE sales
- To achieve the same success as Freeview, Freeview Play needs to enable and support competition between brands and OEMs.

E.g. Panasonic - who are using Freeview Play to build better content discovery

Quick Look Guide

Mon 13th Feb 2017 12:49

< What's been on

What's on next >

07:15 Royal Recipes

08:00 The Great In...

09:00 Victoria Der...

13:00 Snooker: We...

16:20 A Place to C...

17:15 Flog It!

18:00 Eggheads

What's on now

733 Trans World Radio

12:00 14:00

TWR Word

1 BBC ONE Wales

12:15 13:00

Bargain Hunt

2 BBC TWO Wales

11:00 13:00

BBC Newsroom Live

3 ITV Wales

12:30 13:30

Loose Women

4 S4C

12:45 13:00

Dwylo'r Enfys

What's recommended

Silent Witness

The Big Fight Live

The Crystal Maze S...

Law & Order: Spec...

Apple Tree Yard

River Monsters

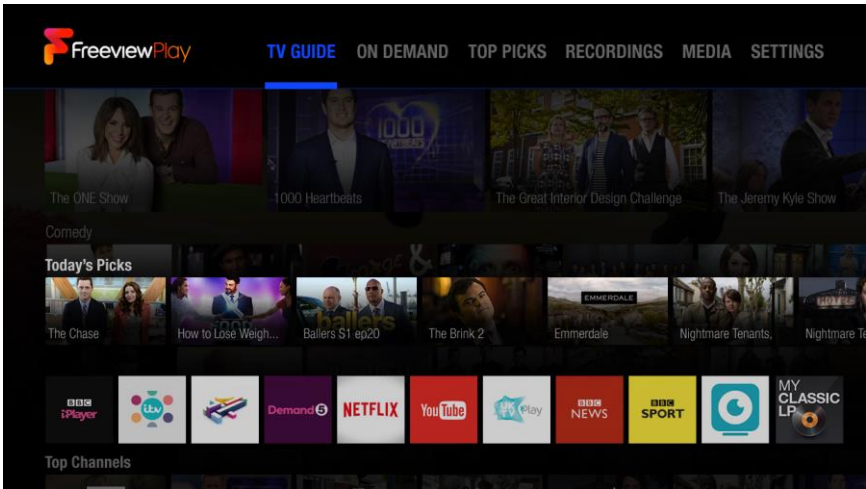
Jamie and Jimmy's ...

OK

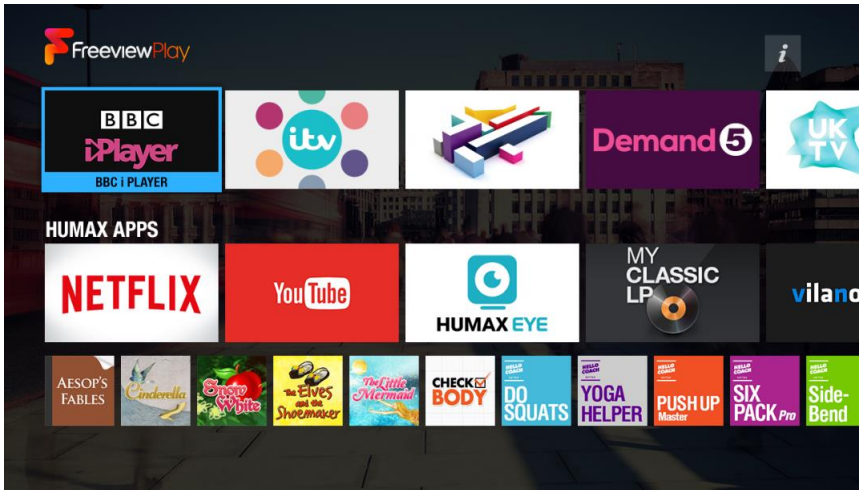
Back

Or Humax, who have enabled their own image-based user interface

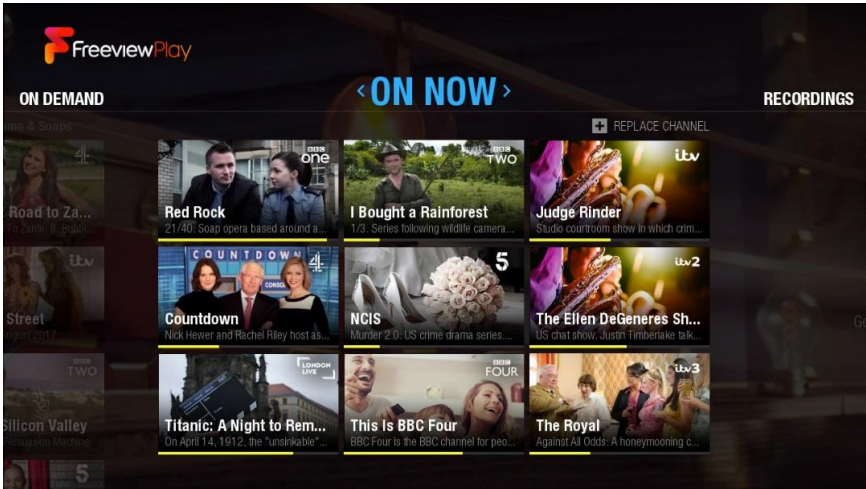
Homescreen



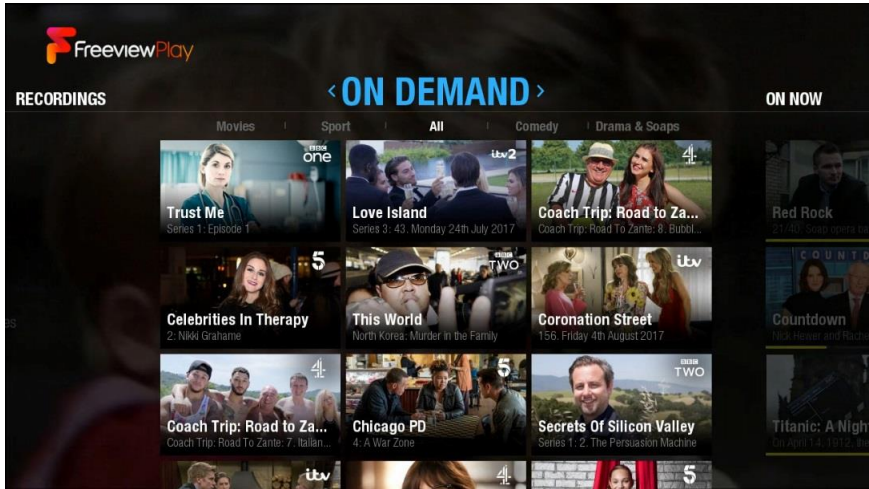
Players Page



Visual EPG of Broadcast Programmes



On Demand Recommendations



HBBTV enables us to offer platform-like consistency through the horizontal market

Explore Freeview Play – available at ch100 for every connected FVP device

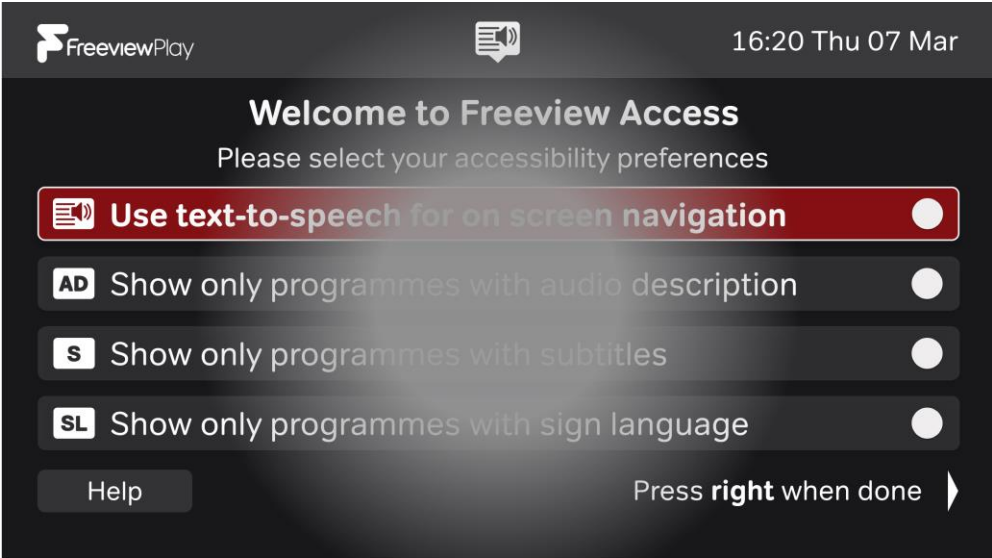


And enables us to develop user experiences for specific audiences...

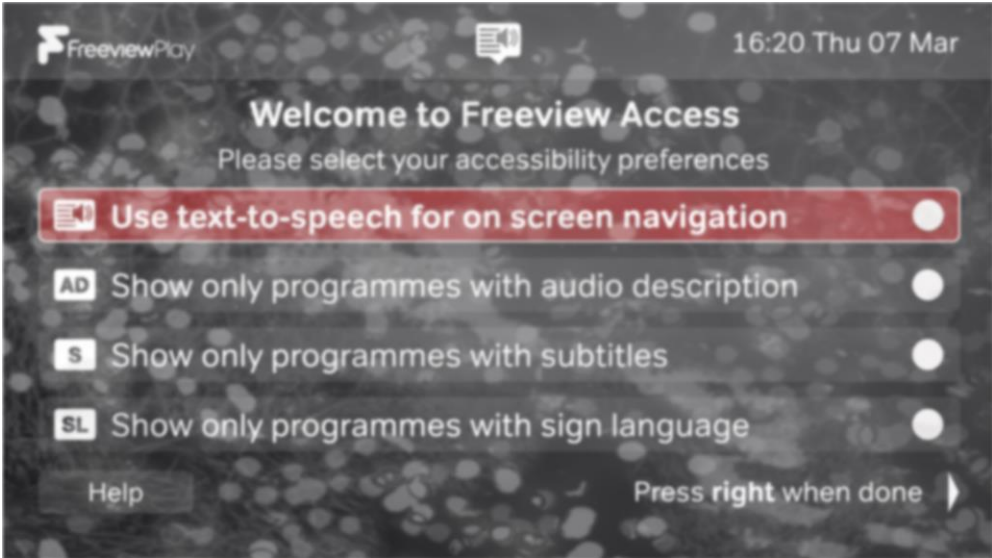


From Channel 555, users with visual impairments will be able to easily find a filtered list of **Audio Described** programmes; or discover **Signed** and **Subtitled** shows if they have hearing difficulties.

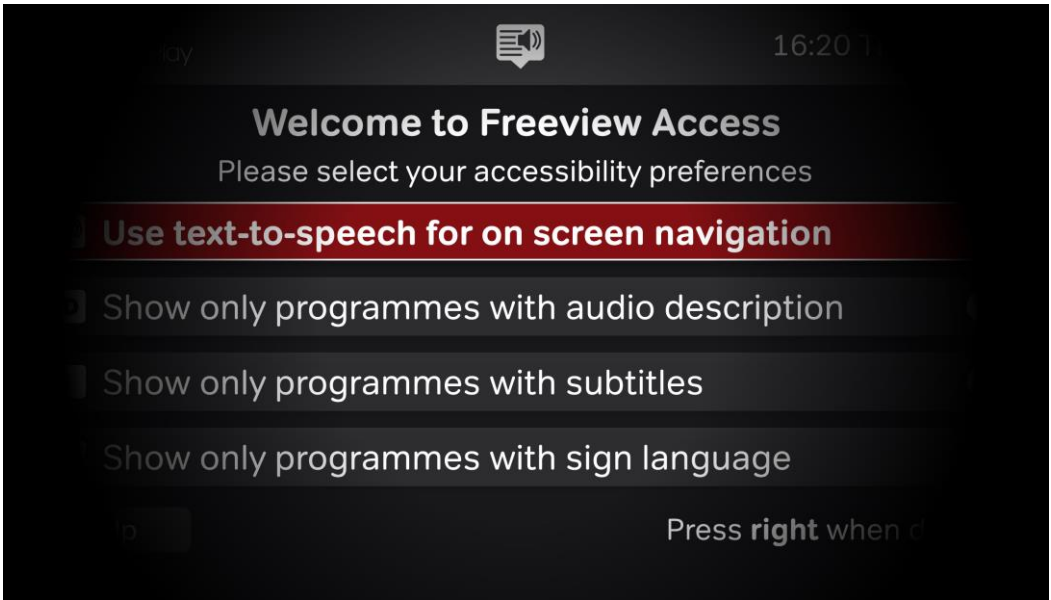
Examples of visual impairments



Macular Degeneration



Cataracts



Direct access from Channel 555

We are opting for “555” as the entry point to the Accessible Guide because:

- 1) It's simple to remember and promote
- 2) There is a raised dot on the number 5 on all remote controls, so it's easy to access for blind users
- 3) Number 5 is an existing button on all remote controls, so the solution works on all legacy devices too



THANK YOU