

Televisions - UK - November 2013

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“In recent years, people have prioritised visual aspects, such as screen size, design and picture quality, ahead of ‘internal’ features, such as smart and 3D capability. Whilst consumers haven’t had to pay a significant premium for these aesthetic aspects in recent years, super-slim 4K OLED TVs will reignite value as consumers and manufacturers priorities realign.”

– Paul Davies, Senior Technology Analyst

This report looks at the following areas:

- Are TVs in danger of becoming monitors for external content sources?
- Will the small TV market become obsolete?
- Beyond the impact of the FIFA World Cup in 2014, how can the market return to growth?
- Will smart and 3D TVs ever take off?

The much awaited launch of OLED and Ultra HD (4K) TVs looks like saving the market from a further period of decline. Consumers have generally shunned the most recent category of innovations – smart and 3D TV – in favour of more basic large screen TVs with few additional features.

History shows that people will pay a premium for better picture quality, which gives brands more room for optimism as we approach the next-generation of high-definition TVs (4K).

However, the impact of OLED and Ultra HD televisions will not be realised until at least 2015, as these value-adding technologies come with a hefty price tag that few will be able to afford until then. In the meantime, brands will be hoping that the economy continues to recover ahead of the FIFA World Cup in 2014, which should provide the industry with a much needed volume injection.

This report looks at how ownership of different types of TV has developed, and also discusses the location of TVs in consumers’ homes. People’s purchasing plans are also assessed as we discover when consumers are looking to buy their next TV, and which features or screen types they are most interested in.

The report also investigates the value consumers place on different types of TV product features, and what attitudes they have towards buying and watching television. Finally, we look at the usage of smart apps, HD and 3D channels amongst existing device owners.

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