

Televisions - UK - August 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“Through declining prices and the build-up to major sporting events, take-up of 4K Ultra HD TVs has grown in the last year. It is vital brands offer equally impressive sound quality built into sets, while also ensuring seamless navigation of smart TV interfaces, utilising voice assistants and smartphones.”

– **Matt King, Category Director - Technology**

This report looks at the following areas:

- Consumers are prioritising larger screens as the emphasis on the main set grows
- Demand for sound quality provides an opportunity to boost sales

The market for televisions saw some respite from the decline of recent years with growth in volume sales in 2018. This was driven by discounting and promotions ahead of the FIFA World Cup, alongside a general decline in the average prices of 4K Ultra HD televisions as price premiums are steadily being removed. The falling prices meant the gains in market revenue were modest and a decline is expected over the next five years. The emphasis for the market will be on driving 4K upgrades beyond the most technologically engaged and taking higher picture resolution mainstream.

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Televisions - UK - August 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know
Products covered in this Report

Executive Summary

The market

The market is relying on 4K sets to limit declining volume sales

Figure 1: Volume of the UK television market, 2014-2024

Further declining market value expected after modest 2018 growth

Figure 2: Value of the UK television market, 2014-24

Companies and brands

A third of main HD/4K Ultra HD screens are Samsung

Figure 3: Brand of TVs in the household and brand of the main TV in the household, June 2019

Advertising spend declined despite the impact of World Cup promotions

Figure 4: Recorded above-the-line, online display and direct mail total advertising expenditure on televisions, by media type, 2016-18

The consumer

71% of people with HD/4K televisions have two or more sets in the home

Figure 5: Number of televisions in the household, June 2019

Rising 4K take-up driving the number of televisions in the home

Figure 6: Type of televisions in the household, April 2018-June 2019

Over eight in 10 people have an internet-connected television

Figure 7: Television connectivity, January 2019 – June 2019

Over four in 10 people spent over £500 on their main television

Figure 8: Cost of main television, June 2019

There is strong demand for better built-in sound quality

Figure 9: Important factors when upgrading, June 2019

Half of people are using catch-up and streaming services on the main TV

Figure 10: Uses of the main television, June 2019

There is strong potential for television control to move beyond the traditional remote

Figure 11: Attitudes towards television technology, June 2019

What we think

Issues and Insights

Consumers are prioritising larger screens as the emphasis on the main set grows

The facts

The implications

Demand for sound quality provides an opportunity to boost sales

The facts

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Televisions - UK - August 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

The implications

The Market – What You Need to Know

- The market is relying on 4K sets to limit declining volume sales
- Further declining market value expected after modest 2018 growth
- Live viewing time declines as the role of the TV shifts
- Range of 4K Ultra HD content continues to expand
- AI Upscaling offers potential solution to the lack of 8K content
- Major sports events continue to provide a boost to retailers

Market Size and Forecast

- The market is relying on 4K sets to limit declining volume sales
 - Figure 12: Volume of the UK television market, 2014-2024
 - Figure 13: Volume of the UK television market, 2014-2024
- Further declining market value expected after marginal 2018 growth
 - Figure 14: Value of the UK television market, 2014-24
 - Figure 15: Value of the UK television market, 2014-24
- Forecast methodology

Market Drivers

- Live viewing time declines as the role of the TV shifts
 - Figure 16: Average daily minutes of TV viewing, 2010-17
- Range of 4K Ultra HD content continues to expand
- AI Upscaling offers potential solution to the lack of 8K content
- Environmental impact could limit the continued growth of streaming video
- Major sports events continue to provide a boost to retailers
- Augmented reality being utilised to sell larger screens
- 2020 games console releases will drive demand for 4K screens

Companies and Brands – What You Need to Know

- LG unveils the world's first 8K OLED TV
- Samsung previews updated 'The Wall' TV at CES 2019
- Sony's 98-inch 8K screen will be one of the most expensive on the market
- Samsung becomes first TV manufacturer to offer Apple TV app
- Advertising spend declined despite the impact of World Cup promotions
- Leading three manufacturers' share of advertising spend declines to 56%

Launch Activity and Innovation

- LG unveils the world's first 8K OLED TV
 - Figure 17: LG's Signature Z9 8K OLED TV
- Samsung previews updated 'The Wall' TV at CES 2019 ...
 - Figure 18: Samsung's The Wall TV
- ... while also updating its 8K TVs with flagship Q950R range

BUY THIS
REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
 APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com

Televisions - UK - August 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 19: Samsung's flagship Q950R television

Sony's 98-inch 8K screen will be one of the most expensive on the market

Figure 20: Sony's 8K Masters Series ZG9 TV

Bang & Olufsen reveals Beovision Harmony range

Figure 21: Bang & Olufsen's Harmony TV

Samsung becomes first TV manufacturer to offer Apple TV app

Advertising and Marketing Activity

Advertising spend declined despite the impact of World Cup promotions

Figure 22: Recorded above-the-line, online display and direct mail total advertising expenditure on televisions, by media type, 2016-18

Figure 23: Recorded above-the-line, online display and direct mail total advertising expenditure on televisions, by media type, 2017 and 2018

Leading three manufacturers' share of advertising spend declines to 56%

Figure 24: Recorded above-the-line, online display and direct mail total advertising expenditure on televisions, by advertiser, 2016-18

Nielsen Ad Intel coverage

Brand Research

Brand map

Figure 25: Attitudes towards and usage of selected brands, July 2019

Key brand metrics

Figure 26: Key metrics for selected brands, July 2019

Brand attitudes: Samsung achieving greater differentiation than other brands

Figure 27: Attitudes, by brand, July 2019

Brand personality: Sony and Samsung deemed fun due to success in other categories

Figure 28: Brand personality – macro image, July 2019

Samsung and Sony perceived as the most stylish and desirable brands

Figure 29: Brand personality – micro image, July 2019

Brand analysis

TV market leader Samsung deemed worth paying for more

Figure 30: User profile of Samsung, July 2019

Sony is deemed a fun yet prestigious brand

Figure 31: User profile of Sony, July 2019

LG is seen as good value but struggles to match the differentiation of Sony and Samsung

Figure 32: User profile of LG, July 2019

Panasonic scores high on trust but lacks exclusivity

Figure 33: User profile of Panasonic, July 2019

Philips is viewed as an accessible and affordable brand

Figure 34: User profile of Philips, July 2019

Toshiba seen as affordable but lacks a strong brand personality

Figure 35: User profile of Toshiba, July 2019

Hisense rapidly growing in awareness and usage despite recent UK market entry

Figure 36: User profile of Hisense, July 2019

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Televisions - UK - August 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

The Consumer – What You Need to Know

- A third of main HD/4K Ultra HD screens are Samsung
- 71% of people with HD/4K televisions have two or more sets in the home
- Rising 4K take-up driving the number of televisions in the home
- 16% of people got their television in the last year
- Over four in 10 people spent over £500 on their main television
- A quarter of people say higher screen resolution is the most important upgrade factor
- There is strong demand for better built-in sound quality
- Half of people are using catch-up and streaming services on the main TV
- Nearly half of 25-34s mount their TV to the wall
- There is strong potential for television control to move beyond the traditional remote
- Sound bars represent a chance to boost manufacturer revenues

Television Brand Ownership

- A third of main HD/4K Ultra HD screens are Samsung
- Hisense is well-placed to increase its market share
Figure 37: Brand of TVs in the household and brand of the main TV in the household, June 2019
- Samsung particularly popular among under-44s
Figure 38: Ownership of big four television brands, by age, June 2019
- Samsung ownership peaks at 44% among those paying £1,001-£2,000
Figure 39: Brand of main television, by cost of main television, June 2019

Televisions in the Home

- 71% of people with HD/4K televisions have two or more sets in the home
Figure 40: Number of televisions in the household, June 2019
- Rising 4K take-up driving the number of televisions in the home
Figure 41: Type of televisions in the household, April 2018-June 2019
- Younger demographics have more TVs in the home due to larger households
Figure 42: Number of televisions in the household, by age, June 2019
- Two-set households are the most likely recent purchasers
Figure 43: Number of televisions in the household, by age of main television, June 2019
- Most people with one TV do not want additional sets
Figure 44: Reasons for only having one television set in the household, June 2019
- Over eight in 10 TV households are connected
Figure 45: Television connectivity, January 2019 – June 2019

Age and Cost of Televisions

- 16% of people got their television in the last year ...
Figure 46: Age of main television set, June 2019
- ... rising to 23% among 16-24 year olds
Figure 47: Length of time owning main television, by age, June 2019

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
 APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com

Televisions - UK - August 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Over four in 10 people spent over £500 on their main television

Figure 48: Cost of main television, June 2019

35-44s are spending the most on the main television

Figure 49: Cost of main television, by Age, June 2019

Important Factors when Upgrading

A quarter of people say higher screen resolution is the most important upgrade factor

There is strong demand for better built-in sound quality

Figure 50: Important factors when upgrading, June 2019

Three quarters of people prioritise bigger screens and better picture quality ...

... while half are looking for effective smart TV interface or smart hubs

Figure 51: Important factors when upgrading, net data, June 2019

45-54 year olds are the most likely to prioritise resolution and larger screens

Figure 52: Important factors when upgrading, by age, June 2019

Use of Main Television Sets

Half of people are using catch-up and streaming services on the main TV

Figure 53: Uses of the main television, June 2019

25-34 year olds are using the TV for streaming more than live broadcasts

Figure 54: Uses of the main television, by age, June 2019

Growth in 4K take-up could reduce live broadcast viewing further

Figure 55: Intention to buy technology products in the next three months, June 2018-June 2019

Attitudes towards Televisions

Vast majority of people say they have space for a larger television

Figure 56: Attitudes towards television space, June 2019

Nearly half of 25-34s mount their TV to the wall

Figure 57: Television wall mounting, by selected demographics, June 2019

Strong potential for television control to move beyond the traditional remote

Figure 58: Attitudes towards television technology, June 2019

Sound bars represent a chance to boost manufacturer revenues

Figure 59: Televisions – CHAID – Tree output, June 2019

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

Market size and forecast

Fan chart forecast

Value

Figure 60: Best- and worst-case forecast for the value of the UK television market, 2019-24

Volume

Figure 61: Best- and worst-case forecast for the volume of the UK television market, 2019-24

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Televisions - UK - August 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Brand research

Brand map

CHAID analysis – Methodology

Figure 62: Televisions – CHAID – Table output, June 2019

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com