

# **United Kingdom Television Market Segmented By Screen Size (40"-49", 39" and Below, 50"-59", Above 59"), By Display Type (LED, OLED, Others (LCD, QLED, etc.)), By Sales Channel (Supermarkets/Hypermarkets, Multi Branded Stores, Online, Others (Institutional Sales, Exclusive Stores, etc.)), By Region, Competition, Forecast and Opportunities, 2019-2029F**

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## **Abstracts**

United Kingdom Television Market was valued at USD 4.97 billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 8.20% through 2029. The United Kingdom television market is a dynamic and ever-evolving industry that reflects the changing preferences, technologies, and habits of its diverse population. As one of the world's leading television markets, it combines a rich history of broadcasting with the latest developments in digital media, creating a multifaceted and vibrant landscape.

The United Kingdom television market encompasses both traditional broadcast television and modern digital services, offering a wide array of content, ranging from news and entertainment to sports and documentaries. This market's diversity is underscored by the presence of numerous television channels, both public and private, and a growing number of streaming platforms, catering to a range of viewer interests.

The United Kingdom television market boasts a mix of domestic and international players, including public broadcasters like the BBC and Channel 4, as well as private networks such as ITV and Sky. These established broadcasters have a long history of

delivering high-quality content to British audiences.

In addition to traditional broadcasters, streaming services like Netflix, Amazon Prime Video, and Disney+ have made significant inroads into the market. These platforms offer on-demand access to an extensive library of international content, allowing viewers to choose what they watch and when they watch it.

Streaming services have gained immense popularity in the UK, with millions of subscribers. Their vast libraries of movies, TV shows, and original content provide viewers with a convenient and flexible way to enjoy their favorite programs. Both traditional broadcasters and streaming services have invested in producing high-quality original content. The UK has become a hub for creating critically acclaimed series and documentaries that are recognized worldwide.

The adoption of smart TVs, which are capable of connecting to the internet and streaming services, has increased significantly. These devices have become commonplace in UK households, offering a seamless way to access digital content. Viewers increasingly opt for on-demand viewing, where they have the freedom to watch content at their convenience. The traditional linear broadcasting schedule is giving way to viewers' preferences for time-shifting and binge-watching. The United Kingdom television market has witnessed regulatory changes, including the regulation of online platforms and streaming services. Such changes have been implemented to ensure fair competition and adherence to content standards.

The growing number of channels and streaming services has led to audience fragmentation. As viewers have more choices, it can be challenging for advertisers to reach a broad audience through traditional advertising methods. The ease of digital distribution has also led to issues of content piracy, impacting the revenues of content creators and distributors.

## Key Market Drivers

### Technological Advancements and Convergence

Technological advancements have been a major driver of growth in the United Kingdom television market. The television landscape has evolved significantly over the past few decades, transitioning from traditional broadcast and cable television to digital and internet-based platforms. This transition has led to the convergence of television and the internet, resulting in a highly competitive and dynamic ecosystem.

One of the key technological advancements driving this transformation is the rise of smart TVs and connected devices. These innovations allow viewers to access a wide range of content, including streaming services, apps, and online video, directly on their television screens. The popularity of streaming services like Netflix, Amazon Prime Video, and Disney+ has disrupted traditional television broadcasting. These platforms offer on-demand content, a variety of genres, and the freedom to watch at the viewer's convenience.

Furthermore, the introduction of 4K and even 8K Ultra High Definition (UHD) televisions has revolutionized the viewing experience, providing exceptional picture quality and immersive content. The availability of high-speed internet and advanced streaming technologies, like 5G, has made it easier for viewers to access UHD content, further driving the demand for new, high-quality televisions.

This technological convergence is not limited to hardware. It extends to the content itself, as traditional broadcasters have embraced online streaming and on-demand services. Many broadcasters now offer catch-up services and their own streaming platforms, blurring the lines between traditional and digital television.

The growth of the United Kingdom television market is intertwined with these technological advancements, as consumers increasingly seek more flexibility and a broader range of content options. With the continued development of technologies like 8K UHD, augmented reality (AR), and virtual reality (VR), the market is poised for further innovation and growth in the coming years.

### Content Creation and Consumption Habits

The second driver of the United Kingdom television market's growth is the transformation of content creation and consumption habits. Content is king in the television industry, and the UK boasts a vibrant and diverse media landscape that continually adapts to changing viewer preferences.

Content creation has become more accessible and cost-effective, thanks to digital production technologies and the proliferation of independent content creators. These creators, often found on platforms like YouTube, TikTok, and social media, produce a wide array of content, from short-form videos to web series. This democratization of content creation has given rise to a new generation of talent and enabled niche and diverse content to reach audiences.

In addition, there has been a shift towards more original content production by streaming platforms and traditional broadcasters. Original series, films, and documentaries are being created to attract and retain subscribers. The UK has seen a surge in homegrown content, showcasing its rich history, culture, and talent to both domestic and international audiences.

Viewers' consumption habits have also transformed. Binge-watching, the practice of watching multiple episodes of a series in one sitting, has become the norm. This trend has prompted streaming platforms to release entire seasons of original content at once, catering to viewers' desire for immediate gratification. Moreover, personalization algorithms use viewer data to recommend content tailored to individual preferences, further influencing what viewers watch.

The influence of content creation and consumption habits is significant. The demand for fresh, engaging, and culturally relevant content is driving investment in the industry. As content creation evolves, the United Kingdom television market is expected to see a surge in creative storytelling, innovative formats, and engaging content that resonates with a diverse and global audience.

## Advertising and Revenue Models

Advertising and revenue models constitute a critical driver of the United Kingdom television market. The ways in which television is monetized and how advertising reaches audiences have evolved with the changing media landscape.

Traditional television advertising, which relies on scheduled commercial breaks, has faced challenges due to viewer migration to streaming services. Advertisers have recognized the need to adapt to the changing television landscape, resulting in the following key developments:

**Addressable Advertising:** Addressable advertising, also known as targeted advertising, is a significant trend in the United Kingdom television market. This model allows advertisers to deliver personalized ads to specific households or individuals based on their demographics and interests. Addressable advertising is made possible through the collection of viewer data, which is used to tailor advertisements. This approach is considered more effective and efficient than traditional mass-market advertising, making it an attractive option for advertisers.

**Over-the-Top (OTT) Advertising:** OTT platforms, like streaming services, have become a significant avenue for advertisers to reach audiences. As more viewers shift to streaming services, advertisers are increasingly allocating their budgets to digital advertising on these platforms. This includes in-stream video ads, sponsored content, and product placements within streaming content.

**Subscription and Freemium Models:** The rise of subscription-based streaming services and freemium models (offering a basic service for free with premium paid features) has redefined the revenue structure of the television market. While subscription services generate revenue through monthly subscriptions, freemium models leverage advertising and premium subscriptions. Advertisers can access a mix of both paying and non-paying viewers, maximizing their reach.

**Branded Content and Product Placement:** Advertisers are increasingly exploring partnerships with content creators and platforms to produce branded content and incorporate subtle product placements within shows and movies. This approach allows brands to seamlessly integrate their products and messaging into the content, often aligning with the storyline and characters.

The evolution of advertising and revenue models is critical for the sustainability and growth of the United Kingdom television market. As advertisers adapt to changing viewer habits and technologies, the industry's revenue streams continue to evolve. The ability to effectively target and engage audiences is becoming increasingly important, driving innovation in advertising strategies and revenue generation.

## Key Market Challenges

### Evolving Consumer Behavior and Cord-Cutting

One of the most significant challenges facing the United Kingdom television market is the shifting behavior of consumers. With the advent of streaming services and online content platforms, traditional linear television is experiencing a decline in viewership. Consumers, particularly younger demographics, are increasingly turning to streaming services such as Netflix, Amazon Prime Video, and Disney+ for on-demand content. This change in viewing habits has led to cord-cutting, where viewers cancel their traditional pay-TV subscriptions in favor of these digital alternatives.

Cord-cutting presents a significant challenge for traditional broadcasters, cable providers, and advertisers. As viewership fragments across various streaming

platforms, it becomes more challenging to reach a mass audience through traditional advertising. Additionally, traditional broadcasters are grappling with how to adapt to this new landscape, often requiring investments in digital platforms and original content to remain competitive.

Moreover, consumers now have more control over what they watch and when they watch it, which has changed the dynamics of advertising. Traditional ad-supported television is facing reduced ad revenues as advertisers follow their audiences to digital platforms. To address this challenge, the United Kingdom television market must adapt by exploring new advertising models, embracing programmatic advertising, and seeking innovative ways to reach consumers who have become ad-resistant.

### Regulatory and Legislative Changes

The regulatory landscape in the United Kingdom has seen significant changes in recent years, affecting the television industry. The most notable change is the shift in funding models for public service broadcasting (PSB). The traditional model of the license fee, which supports the BBC, is under scrutiny and faces ongoing debate about its sustainability and fairness. Some argue that the license fee model is outdated in the digital age, leading to discussions about alternative funding mechanisms for public service broadcasting.

Additionally, the UK has implemented new regulations aimed at safeguarding consumers, particularly children, from harmful content on television and online platforms. These regulations require broadcasters and digital platforms to ensure that their content is safe and appropriate for all age groups. While this is a commendable initiative, it poses challenges for content creators and distributors who must navigate complex compliance procedures.

Furthermore, the global media landscape is changing rapidly, with the dominance of streaming giants and the entry of international companies into the UK market. The regulatory framework must adapt to address issues such as content standards, competition, and data privacy while promoting diversity and British content production. Finding the right balance between regulation and innovation presents a significant challenge to the United Kingdom television market.

### Technological Advancements and Investment

Technological advancements in the television industry, including the transition to Ultra



High Definition (UHD) and the development of 5G networks, present both opportunities and challenges. While these advancements enhance the viewing experience, they require significant investment from broadcasters and infrastructure providers.

The transition to UHD and the production of content in this format demand new equipment, workflows, and expertise. This technological shift can strain the budgets of broadcasters, particularly smaller and independent channels. Additionally, consumer adoption of UHD television sets and the availability of UHD content play a pivotal role in the success of this transition.

The rollout of 5G networks is another technological challenge. While it offers potential benefits, such as increased connectivity and low-latency streaming, it also requires substantial investment in network infrastructure and content delivery systems. Smoother streaming and interactive television experiences are contingent on the widespread deployment of 5G, which is still a work in progress in many areas.

Cybersecurity and digital piracy are additional concerns in the television industry, especially with the growth of digital content delivery. Broadcasters and content providers must invest in robust cybersecurity measures to protect their content and consumer data. This includes safeguarding against illegal distribution and unauthorized access to content, which can erode revenues and harm brand reputation.

## Key Market Trends

### The Rise of Streaming Services and Over-the-Top (OTT) Content

One of the most transformative trends in the United Kingdom television market is the rapid ascent of streaming services and over-the-top (OTT) content. Streaming platforms like Netflix, Amazon Prime Video, Disney+, and Hulu have disrupted traditional television broadcasting, providing viewers with on-demand access to a vast library of content. This shift is driven by several factors:

**Changing Viewer Behavior:** Increasing numbers of viewers are abandoning linear TV schedules in favor of the flexibility offered by streaming services. They can watch what they want, when they want, without being tied to traditional broadcast schedules.

**Original Content:** Streaming services are investing heavily in original content production, including movies, TV series, and documentaries. These platforms have not only become content distributors but also content creators, competing with established

networks and studios.

**Personalization:** Streaming services leverage advanced algorithms to personalize recommendations for viewers, enhancing the user experience and encouraging continued engagement.

Traditional broadcasters in the UK are adapting to this trend by launching their own streaming platforms. For example, the BBC has introduced BBC iPlayer, and ITV offers ITV Hub. This convergence of traditional and digital content is reshaping the industry's competitive landscape and forcing established players to innovate.

### The Transition to Hybrid Broadcast and Broadband Services

Another notable trend in the United Kingdom television market is the transition to hybrid broadcast and broadband services. Hybrid TV combines traditional linear broadcasting with internet connectivity, enabling viewers to access both live and on-demand content seamlessly. This trend is driven by various factors:

**Improved Connectivity:** The proliferation of high-speed internet connections has made it possible for viewers to stream content and access additional online services while still enjoying traditional TV broadcasts.

**Enhanced Interactive Features:** Hybrid TV allows for interactive features such as on-screen chat, social media integration, and real-time voting, enhancing viewer engagement and participation.

**Catch-Up Services:** Many broadcasters offer catch-up services through hybrid TV, enabling viewers to access content they missed during the initial broadcast, further accommodating changing viewing habits.

**Smart TV Adoption:** The increasing adoption of smart TVs equipped with built-in internet connectivity has facilitated the convergence of broadcast and broadband services.

This trend not only enhances the viewing experience but also opens new revenue streams for broadcasters and content providers, who can offer premium services and targeted advertising through these hybrid platforms.

### Regulatory Changes and Privacy Concerns



Regulatory changes in the UK are significantly impacting the television market, particularly concerning data privacy and advertising regulations. These changes are being driven by:

**GDPR Compliance:** The General Data Protection Regulation (GDPR) has imposed stricter rules on data collection and privacy. Television broadcasters and streaming services must adhere to these regulations, impacting how they collect and use viewer data for targeted advertising.

**Advertising Restrictions:** Regulators have introduced stricter rules governing advertising content, particularly for unhealthy food and drinks. This has prompted broadcasters to adjust their advertising strategies and content to remain compliant.

**Product Placement and Sponsored Content:** Regulators are scrutinizing product placement and sponsored content more closely, ensuring transparency and adherence to advertising standards.

**Protecting Minors:** Regulations are aimed at protecting minors from harmful content, with stricter controls on age-appropriate advertising and content.

These regulatory changes have made it necessary for television broadcasters and streaming services to adapt their practices to comply with the evolving legal landscape. They must also address viewer concerns about data privacy, transparency, and the ethical use of personal information.

## Segmental Insights

### Display Type Insights

Light Emitting Diode (LED) technology has garnered a substantial share in the United Kingdom's television market, reaffirming its position as a dominant and influential force within the industry. The remarkable growth of LED televisions is attributed to a combination of factors, including technological advancements, consumer demand for enhanced viewing experiences, energy efficiency, and competitive pricing.

The United Kingdom television market has witnessed a technological revolution with the ascendancy of LED televisions. LED TVs employ a backlighting system that uses light-emitting diodes to illuminate the display, resulting in improved picture quality and energy efficiency. The adoption of LED technology marked a significant leap forward from the

earlier LCD (Liquid Crystal Display) models and conventional CRT (Cathode Ray Tube) televisions.

LED TVs are renowned for their sharp, vibrant, and energy-efficient displays. Their capacity to deliver high-definition (HD) and Ultra High-Definition (UHD) picture quality has garnered favor among consumers who seek immersive and crystal-clear viewing experiences. The incorporation of features like local dimming and quantum dot technology further enhances color accuracy, contrast, and overall visual appeal.

The United Kingdom's consumers have exhibited a strong desire for television sets that offer a superior visual experience. LED technology has been quick to respond to these demands by providing televisions that are sleek, lightweight, and capable of delivering stunning picture quality. LED TVs cater to a broad spectrum of consumer preferences, from compact screens for bedrooms to large, immersive displays for home theaters.

LED televisions offer a wide range of smart features, including internet connectivity, streaming services, and compatibility with gaming consoles. These features align with modern viewing habits and have contributed to the surge in LED TV sales. The availability of Ultra HD 4K content and compatibility with HDR (High Dynamic Range) technology further enhances the overall viewing experience, making LED TVs attractive to avid movie enthusiasts and gamers.

Energy efficiency has become a focal point in the consumer electronics industry, and LED technology excels in this regard. LED TVs consume significantly less power compared to their predecessors, contributing to reduced electricity bills and a reduced carbon footprint. This focus on sustainability has garnered favor among environmentally conscious consumers and has driven the adoption of LED TVs in the United Kingdom.

Moreover, LED technology is mercury-free, which not only enhances environmental sustainability but also ensures safer and eco-friendly disposal when the television reaches the end of its life cycle.

The United Kingdom television market is highly competitive, with a wide array of brands and models available to consumers. LED TVs, offering a balance of affordability and advanced features, have emerged as a cost-effective choice for a majority of consumers. The competitive pricing of LED televisions makes them accessible to a wide range of demographics, from budget-conscious shoppers to those seeking premium features.

Additionally, the intense competition within the market has driven manufacturers to continually innovate, resulting in improved performance and features without a significant increase in cost. This has further solidified the position of LED televisions as a favorable choice among consumers.

## Sales Channel Insights

The United Kingdom's television market has experienced a significant transformation in recent years, with online streaming platforms playing a pivotal role in reshaping the way viewers consume content. As traditional broadcasting and cable television have faced new challenges, online streaming services have gained a substantial share in the United Kingdom television market, fundamentally altering the industry's landscape.

The emergence of online streaming platforms, such as Netflix, Amazon Prime Video, Disney+, and various others, has revolutionized how people watch television in the UK. These platforms offer on-demand access to a vast library of content, including TV shows, movies, documentaries, and original programming. The convenience, flexibility, and extensive content libraries have led to a shift in viewer preferences, with many UK households choosing to subscribe to one or more streaming services.

Online streaming platforms are known for their diverse content libraries that cater to a wide range of tastes and interests. They offer viewers not only popular international content but also locally-produced shows and movies, fostering a sense of cultural relevance. The production of original content has become a key differentiator, with platforms investing in creating exclusive series and films to attract subscribers. One of the primary advantages of online streaming is the flexibility it provides. Viewers can watch content on various devices, including smartphones, tablets, smart TVs, and laptops. The "anytime, anywhere" nature of online streaming makes it convenient for individuals with busy schedules, allowing them to watch content at their leisure.

Online streaming services often offer competitive pricing, allowing viewers to choose from a variety of subscription plans based on their preferences and budgets. The cost-effectiveness of these platforms is an attractive feature, especially when compared to the rising costs of traditional cable or satellite TV subscriptions. Online streaming platforms leverage sophisticated algorithms to analyze viewer preferences and offer personalized recommendations. This enhances the viewer experience by helping users discover new content tailored to their interests.

Many online streaming services are available globally, allowing viewers in the UK to

access content from around the world. This global reach increases the diversity of content choices and ensures that viewers have access to an array of international shows and movies.

Online streaming has become a significant force in the United Kingdom's television market, challenging traditional television services and redefining how audiences access and enjoy content. The online streaming industry's success is driven by content variety, convenience, personalization, cost-effectiveness, and global availability. As the market continues to evolve, both challenges and opportunities will shape its future, and streaming platforms will need to adapt to stay competitive and meet the evolving preferences of UK viewers.

## Regional Insights

The United Kingdom's television market is a robust and influential sector within the broader entertainment industry. Among the UK's constituent nations, England stands out with a significant share in this market, contributing to its growth and innovation. Several factors contribute to England's commanding influence in the United Kingdom's television market.

England, particularly London, is a recognized global hub for television production and creative talent. The city boasts a vibrant entertainment industry, home to many renowned studios, production companies, and post-production facilities. The concentration of creative and technical expertise in England draws both national and international projects, making it a crucial driver of the UK's television market.

Well-established production companies and television networks like the BBC, ITV, Channel 4, and Sky are based in England, producing a wide range of content, from news and documentaries to scripted drama and reality shows. The industry's creative output in England spans various genres, attracting a diverse viewership.

England's cultural diversity is reflected in the television market, with a rich tapestry of local content that resonates with various communities. England's cultural and regional diversity creates opportunities for the development of programming that appeals to different tastes and backgrounds.

England is not only a content producer but also a significant market for broadcasters. Local channels in England serve as a platform for regional content, including news, cultural programs, and events that cater to specific audiences. This commitment to

diversity and inclusivity is pivotal in retaining and expanding the viewership base.

England serves as a crucial gateway for the distribution of television content, not only within the UK but also on an international scale. Major television production and distribution companies are headquartered in London, facilitating the global distribution of British and international television shows.

Television executives and distributors based in England negotiate international sales and licensing deals, enabling content creators to reach audiences worldwide. This global reach and influence contribute significantly to England's prominent role in the United Kingdom's television market.

The United Kingdom, with a focus on England, is known for its high production standards, resulting in some of the world's most critically acclaimed television programs. England's commitment to quality has garnered international recognition, drawing substantial viewership both within the UK and overseas.

With a skilled workforce and state-of-the-art production facilities, England consistently produces television content that meets the highest technical and creative standards. This commitment to excellence is a compelling factor in maintaining a substantial share of the television market.

### Key Market Players

Samsung Electronics (UK) Ltd.

LG Electronics U.K. Ltd.

Sony Europe B.V

Sharp Consumer Electronics Poland sp. z o.o.

Toshiba Europe Limited

Koninklijke Philips N.V.

Panasonic UK & Ireland

Hitachi Europe Limited

TCL Electronics UK Limited

Jvckenwood U.K. Ltd

### Report Scope:

In this report, the United Kingdom Television market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

#### United Kingdom Television Market, By Screen Size:

40"-49"

39" and Below

50"-59"

Above 59"

#### United Kingdom Television Market, By Display Type:

LED

OLED

Others

#### United Kingdom Television Market, By Sales Channel:

Supermarkets/ Hypermarkets

Multi-Branded Stores

Online

Others



United Kingdom Television Market, By Region:

England

Scotland

Wales

Northern Ireland

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the United Kingdom television Market.

Available Customizations:

United Kingdom Television market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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