



# Global TV Market Review

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# Global TV Market: Splitting into three?

## North America

### Battle of TV Platforms: Ads & Data

- acquire subscribers with new sets
  - TVs at zero margin, shipments growing
  - Profits from recurring revenues
- XXL (100") sizes fully acceptable
- Huge shift linear TV to Streaming,
  - Pay-TV collapsing

## China

### Huge sizes (2024 average over 60")

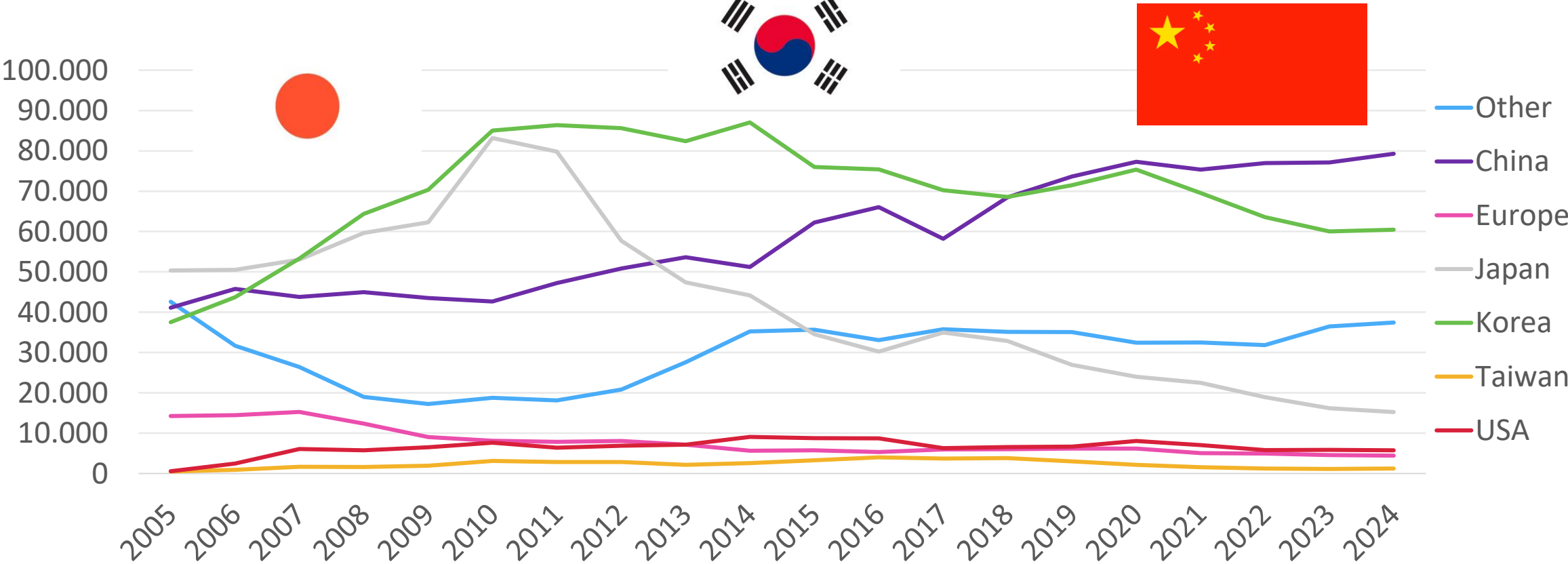
- TV market peaked in 2016 at 60M
- Now less than 40M pa.
- Deflation keeps margins down
- Smart TV Ad revenues minimal

## Europe, Asia, Latin America, MEA

- Moderate sizes, gentle growth
- Europe & developed Asia consumers prefer higher-performance sets
- Some advertising opportunities**, but far less than North America

# Global TV Brand Power Base Has Changed

TV Shipments by Brand Origin (000s)



Source: Omdia

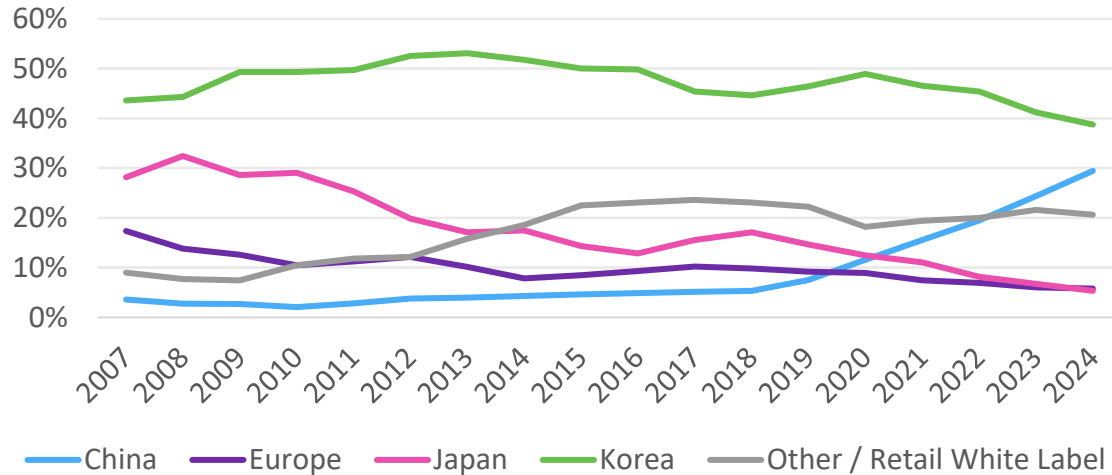
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# Europe TV forecast: watch Chinese brands' next moves...

- Gradual recovery, but never returning to 2019 levels.
  - Revenue continues to slide
  - Consumers less brand and feature sensitive.
- TV Set industry lacks a growth model beyond screen size
- Brands seeking new business models: advertising

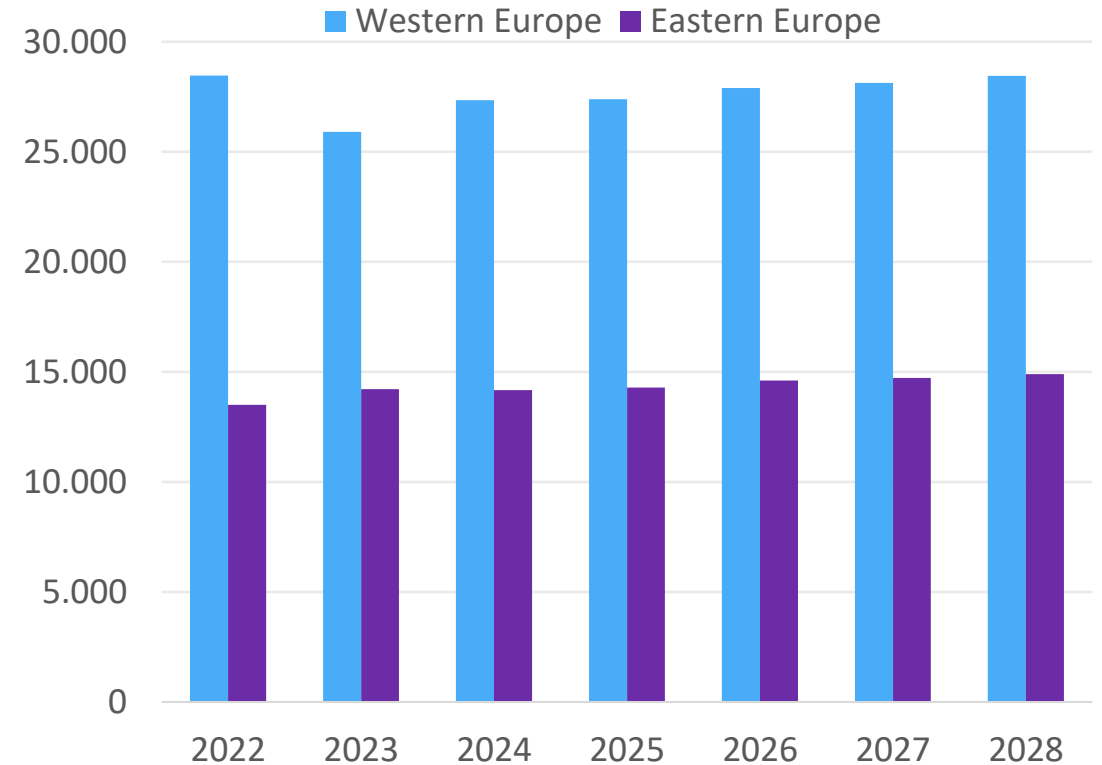
Europe TV Brand Shipment Share



Source: Omdia

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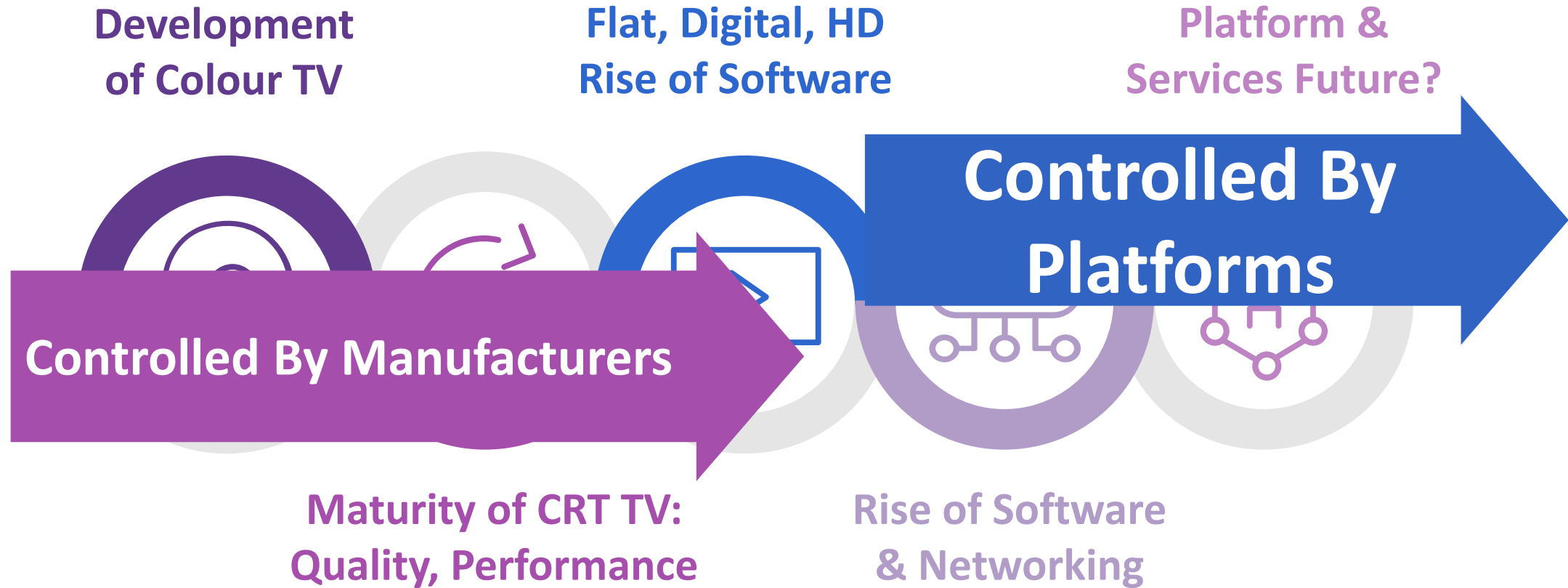
TV Shipment forecast (000s)



Source: Omdia

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# Is this TV's App Store moment?





# HbbTV Opportunities & Concerns:

- **TV hardware business model evolving**, power shift from brands to platforms
  - Is HbbTV neutral?
- Landscape changing with rise of **Chinese brands**:
  - XXL sizes, Chinese technologies breaking out
- How can HbbTV build **audience loyalty and engagement**?
  - Does HbbTV have better advertising outcomes?

# Get in touch!

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# Thank you

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