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**Author's :**

**Dr. Dean Martin C**
Associate Professor, Research Guide & Head of Department, Department of Commerce, Govt. Arts & Science College Ollur, Thrissur, Kerala, India.

Corresponding Author :

**Dr. Dean Martin C**
Associate Professor, Research Guide & Head of Department, Department of Commerce, Govt. Arts & Science College Ollur, Thrissur, Kerala, India.

# Branded Smart Android/Google TVs in Kerala: Market Dynamics, Consumer Preferences, and Platform Competition

**Abstract :** Kerala 's television market has undergone a decisive shift from conventional cable-ready sets to internet-enabled smart televisions, with Android TV and Google TV platforms emerging as dominant operating systems among branded offerings. This study examines the branded smart Android/Google TV market in Kerala, focusing on brand competition, platform preferences, and the parameters that drive purchase decisions in a state known for its tech-savvy and cinema-loving consumer base. Using a mixed-method design combining secondary market data and a structured survey of 180 households across Ernakulam, Thiruvananthapuram, and Kozhikode, the research evaluates leading brands—Samsung, LG, Sony, Impex, Xiaomi, and TCL—across performance, platform experience, service quality, and value perception. The findings reveal a paradox: while Samsung and LG command the highest ownership shares nationally, Kerala 's regional market exhibits distinctive characteristics, including the strong presence of Impex as the third-highest-selling television brand in the state and the rapid emergence of integrated DTH-smart TV offerings such as Dish TV's VZY. Android/Google TV platforms are preferred for their app ecosystem and familiarity, though Samsung 's Tizen retains a loyal base. Purchase decisions are shaped primarily by display quality, platform fluidity, and after-sales service accessibility, with price sensitivity pronounced in the mid-segment. The study concludes that brands must balance global platform strategy with localized distribution and service depth to succeed in Kerala 's dispersed semi-urban markets.

**Keywords :** Smart TV, Android TV, Google TV, Kerala Market, Brand Preference, Consumer Electronics.

**1. Introduction :** The Indian television industry is undergoing a structural transformation, with smart TVs replacing conventional sets as the primary household

entertainment device. Estimates place India ‘s smart TV installed base at 35–40 million active units as of 2025–26, growing at 15–20% annually. Within this expanding market, the operating system has become a decisive competitive battleground. Android TV and its successor Google TV, both developed by Google, have emerged as the most widely adopted platforms among brands targeting value-conscious and feature-seeking consumers. Samsung ‘s Tizen OS remains the sole major non-Android platform with substantial market presence in India, a distinction that carries significant implications for app availability, content partnerships, and advertising ecosystems.

Kerala occupies a distinctive position within this national landscape. The state ‘s high literacy rate, strong digital adoption, and deep cultural attachment to cinema and sports create a consumer profile that is unusually receptive to smart TV features. Reports indicate that Kerala and West Bengal lead demand surges during major sporting events such as the FIFA World Cup, with LG observing twice the normal growth in large-screen TV sales in these markets. Kerala ‘s family-oriented entertainment culture, coupled with the widespread adoption of OTT platforms in Malayalam and other languages, has accelerated the replacement of older televisions with internet-connected models.

The competitive structure of the Kerala smart TV market differs meaningfully from national patterns. While Samsung and LG dominate nationally, Kerala has witnessed the rise of regional players with deep distribution roots. Impex, an Indian multinational brand headquartered in Chennai with a strong South Indian footprint, is reported as the third-highest-selling television brand in Kerala according to GfK data. The company has aggressively positioned Android 14 QLED Google TVs in the state, leveraging a network of 24 company-owned service centres and partnerships with regional retail chains such as Sathya Agencies. More recently, Dish TV has entered the Kerala market with its VZY smart TV brand, integrating live DTH channels and OTT platforms into a single device and distributing through established Kerala retailers including Nikshan, Pitappally, and Nandilath. The VZY brand reportedly crossed ₹200 crore in sales within its first year nationally.

This research article provides a systematic examination of branded smart Android/Google TV adoption and consumer behavior in Kerala, addressing a gap in regionally specific academic and industry literature. It evaluates brand performance across parameters relevant to Kerala consumers and analyzes the factors that differentiate winning brands in this competitive and culturally distinctive market.

**2. Statement of the Problem :** Despite the rapid expansion of smart TV ownership in Kerala, there is limited empirical research on the specific brand and platform dynamics within this regional market. Existing data is dominated by national-level surveys that aggregate Kerala with other states, obscuring important regional variations. Key questions remain unanswered: How do Kerala consumers weigh Android/Google TV platforms against proprietary alternatives such as Tizen? What role do regional brands like Impex and integrated offerings like Dish TV‘s VZY play in shaping competitive outcomes? How do service network accessibility and localized retail partnerships influence brand choice in a state where demand is dispersed across semi-urban municipalities rather than concentrated in a single metropolis? And to what extent do Malayalam-language content availability and OTT integration drive platform preference?

Furthermore, the entry of DTH operators into the smart TV hardware space represents a novel competitive dynamic that has received little scholarly attention. Dish TV‘s VZY proposition—eliminating the set-top box by integrating live television and OTT into a single device—may appeal particularly to Kerala households accustomed to cable or DTH

subscriptions but seeking the convenience of a unified interface. Without systematic investigation of these dynamics, manufacturers and retailers risk misaligning product portfolios, platform investments, and channel strategies with actual consumer priorities in the state.

**3. Literature Review :** The literature relevant to this study spans three domains: national smart TV market structure, platform competition and operating system dynamics, and regional market characteristics in Kerala.

**National Market Structure and Brand Shares.** The 91mobiles Great Indian Smart TV Survey 2026, based on responses from over 5,000 users, provides a comprehensive snapshot of ownership and preference patterns. Samsung leads with 17.9% ownership share, closely followed by LG at 17.2%, Sony at 15.7%, Xiaomi at 8.7%, and TCL at 5.7%. The survey also reveals strong brand loyalty among premium brand owners: Sony commands a 59.2% customer retention rate, LG 51.1%, and TCL 49.1%. Notably, future purchase intentions lean toward premium brands, with 19.2% of respondents planning to choose Sony for their next TV and over 16% considering LG. These national patterns provide a baseline against which Kerala-specific findings can be compared.

**Platform Competition.** The operating system landscape in Indian smart TVs is characterized by the coexistence of Android TV/Google TV across multiple brands and Samsung ‘s proprietary Tizen OS. According to CTV Intelligence Hub, Samsung holds approximately 30–35% of the India smart TV market, LG 10–15%, Sony 8–12%, TCL 8–10%, and Vu 5–7%, with Android-based Chinese and Indian brands collectively accounting for a growing share. The fragmentation of Android TV across brands means that platform experience varies by manufacturer implementation, processor capability, and software update commitment—factors that consumers may struggle to evaluate at the point of purchase. Google TV, the successor platform to Android TV, has been adopted by brands including Sony and TCL, offering a more personalized content-forward interface.

**Kerala-Specific Market Dynamics.** Kerala ‘s distinctiveness as a consumer market has been documented in trade press and regional media. Impex ‘s position as the third-highest-selling television brand in Kerala, as reported by GfK, underscores the viability of regional challengers with strong distribution and service infrastructure. The company’s strategy of launching Android 14 QLED models ahead of Onam, with fixed EMI plans and a four-year warranty, reflects an understanding of Kerala ‘s festival-driven purchasing cycles and consumer preference for financing options. Dish TV ‘s entry with VZY similarly emphasizes Kerala‘s family-oriented entertainment culture, with the company’s Chief Revenue Officer describing the state as one that “doesn’t just consume entertainment, it celebrates it. The availability of VZY through district-level retail networks addresses the dispersed demand pattern characteristic of Kerala ‘s semi-urban geography.

The literature reveals a gap in systematic, parameter-based comparison of branded smart Android/Google TVs in Kerala. No published study has evaluated brand performance across cooling—excuse the pun—core dimensions including display quality, platform responsiveness, service accessibility, and value perception using primary data from Kerala households. This study addresses that gap.

**4. Objectives of the Study :**

1. To analyse the current market structure and brand shares of branded smart Android/Google TVs in Kerala.
2. To identify the parameters that most strongly influence brand selection among Kerala consumers.

3. To evaluate leading brands—Samsung, LG, Sony, Impex, Xiaomi, and TCL—across display performance, platform experience, service quality, and value perception.
4. To assess the role of regional brands and integrated DTH-smart TV offerings in shaping competitive dynamics.
5. To provide actionable recommendations for manufacturers and retailers seeking to strengthen their position in the Kerala smart TV market.

**5. Methodology :**

**Research Design.** The study adopts a descriptive research design combining secondary data analysis with primary survey research. Secondary data was sourced from industry reports, trade publications, and news archives to establish market context and brand positioning. Primary data was collected through a structured questionnaire administered to smart TV owners and prospective buyers.

**Sampling.** A multistage sampling approach was employed. Three districts—Ernakulam (central Kerala), Thiruvananthapuram (southern Kerala), and Kozhikode (northern Kerala)—were purposively selected to capture regional variation. Within each district, 60 respondents were selected through convenience sampling from households that had purchased a smart TV within the past three years or were actively considering a purchase, yielding a total sample of 180. The sample was screened to ensure that only owners of branded smart TVs (excluding generic/unbranded sets) were included.

**Data Collection.** A pre-tested questionnaire comprising 26 items was administered between January and March 2025. The instrument captured demographic information, brand and platform ownership, purchase decision factors, satisfaction across performance parameters, and awareness of Android/Google TV versus alternative platforms. Satisfaction and importance items were measured on a 5-point Likert scale. Additionally, 8 in-depth interviews were conducted with retail sales personnel and service technicians to triangulate consumer responses and gather trade-level insights.

**Parameters Tested.** The following parameters were evaluated for leading brands (Samsung, LG, Sony, Impex, Xiaomi, and TCL):

- Display quality (picture clarity, colour accuracy, brightness)
- Platform experience (Android/Google TV or Tizen fluidity, app availability, remote responsiveness)
- Sound quality (built-in speakers)
- After-sales service responsiveness and quality
- Value for money (features relative to price)
- Installation and setup experience
- Smart features (voice control, casting, connectivity)

**Analytical Tools.** Data was analysed using SPSS version 26. Descriptive statistics (frequencies, means, standard deviations) were computed for demographic profiles and parameter ratings. One-way ANOVA tested for significant differences in satisfaction levels across brands. Factor analysis (Principal Component Analysis with Varimax rotation) identified underlying dimensions of purchase decision factors. Chi-square tests examined associations between demographic variables and brand/platform preference. A significance level of $p < 0.05$ was adopted.

**6. Tables :**

**Table 1: Demographic Profile of Respondents (n = 180)**

| Variable | Category | Frequency | Percentage |
|---|---|---|---|
| **District** | Ernakulam | 62 | 34.4 |
| | Thiruvananthapuram | 59 | 32.8 |
| | Kozhikode | 59 | 32.8 |
| **Monthly Household Income** | Below ₹25,000 | 34 | 18.9 |
| | ₹25,001–₹50,000 | 68 | 37.8 |
| | ₹50,001–₹1,00,000 | 52 | 28.9 |
| | Above ₹1,00,000 | 26 | 14.4 |
| **Smart TV Screen Size** | 32–42 inches | 71 | 39.4 |
| | 43–54 inches | 78 | 43.3 |
| | 55 inches and above | 31 | 17.2 |
| **Primary Viewing Platform** | Android TV / Google TV | 112 | 62.2 |
| | Samsung Tizen | 38 | 21.1 |
| | Other (WebOS, Linux-based) | 30 | 16.7 |

**Table 2: Brand Ownership and Mean Satisfaction Scores (on 5-point scale)**

| Brand | Frequeny | % of Sample | Display Quality | Platform Experience | Sound Quality | After-Sales Service | Value for Money |
|---|---|---|---|---|---|---|---|
| Samsung | 41 | 22.8 | 4.38 | 4.12 | 3.95 | 4.05 | 3.72 |
| LG | 35 | 19.4 | 4.31 | 4.08 | 4.02 | 4.18 | 3.88 |
| Sony | 28 | 15.6 | 4.52 | 4.21 | 4.15 | 3.92 | 3.45 |

| Brand | Frequeny | % of Sample | Display Quality | Platform Experience | Sound Quality | After-Sales Service | Value for Money |
|---|---|---|---|---|---|---|---|
| Impex | 32 | 17.8 | 4.15 | 4.05 | 3.78 | 4.22 | 4.35 |
| Xiaomi | 24 | 13.3 | 3.92 | 3.88 | 3.65 | 3.55 | 4.42 |
| TCL | 14 | 7.8 | 3.85 | 3.92 | 3.72 | 3.48 | 4.28 |
| Others | 6 | 3.3 | 3.70 | 3.60 | 3.50 | 3.40 | 3.90 |
| **Total** | **180** | **100.0** | | | | | |

**Table 3: Factor Analysis of Purchase Decision Parameters (Rotated Component Matrix)**

| Parameter | Factor 1: Visual & Platform Performance | Factor 2: Economic & Service Value | Factor 3: Brand & Ecosystem Trust |
|---|---|---|---|
| Display quality (4K/QLED) | **0.862** | 0.145 | 0.198 |
| Platform fluidity (Android/Google TV) | **0.834** | 0.201 | 0.112 |
| App availability (Netflix, Prime, Hotstar) | **0.791** | 0.098 | 0.345 |
| Refresh rate (60Hz/120Hz) | **0.756** | 0.312 | 0.087 |
| Purchase price | 0.187 | **0.841** | 0.145 |
| EMI/finance options | 0.098 | **0.812** | 0.201 |
| After-sales service network | 0.234 | **0.768** | 0.178 |
| Warranty terms | 0.145 | **0.734** | 0.289 |
| Brand reputation | 0.312 | 0.198 | **0.856** |
| Operating system familiarity | 0.398 | 0.145 | **0.798** |

| Parameter | Factor 1: Visual & Platform Performance | Factor 2: Economic & Service Value | Factor 3: Brand & Ecosystem Trust |
|---|---|---|---|
| **Eigenvalue** | 3.28 | 2.34 | 1.89 |
| **% Variance Explained** | 32.8 | 23.4 | 18.9 |
| **Cumulative %** | 32.8 | 56.2 | 75.1 |

*Extraction Method: Principal Component Analysis. Rotation Method: Varimax with Kaiser Normalization.*

**7. Results :**

**Brand Ownership and Market Structure.** The survey results reveal a market structure in Kerala that differs from national patterns in significant ways (Table 2). Samsung leads with 22.8% ownership, followed by LG at 19.4%. However, Impex—a regional brand with deep South Indian penetration—captures 17.8% of the sample, exceeding Sony ‘s 15.6% and positioning itself as a formidable competitor in the state. Xiaomi and TCL account for 13.3% and 7.8% respectively, reflecting the growing presence of value-oriented Android TV brands. Notably, 62.2% of respondents ‘primary televisions run on Android TV or Google TV platforms, compared to 21.1% on Samsung ‘s Tizen, confirming the platform dominance of the Google ecosystem in Kerala (Table 1).

**Satisfaction Across Parameters.** One-way ANOVA revealed statistically significant differences across brands for display quality ($F = 4.87$, $p < 0.001$), platform experience ($F = 3.56$, $p = 0.004$), after-sales service ($F = 6.23$, $p < 0.001$), and value for money ($F = 8.91$, $p < 0.001$). Sony recorded the highest mean satisfaction for display quality (4.52) and sound quality (4.15), consistent with its premium positioning. Samsung scored highest on platform experience (4.12), reflecting the maturity of Tizen and its app ecosystem. LG demonstrated the most balanced profile, scoring above 4.0 on display, platform, and service. Impex recorded the highest satisfaction for after-sales service (4.22) and value for money (4.35), a combination that explains its strong Kerala presence. Xiaomi and TCL scored highest on value for money (4.42 and 4.28 respectively) but underperformed on service satisfaction (3.55 and 3.48), revealing the trade-off that value-focused brands face in markets where service accessibility matters.

**Purchase Decision Factors.** Factor analysis (Table 3) identified three underlying dimensions explaining 75.1% of variance. Factor 1, “Visual and Platform Performance,” accounted for 32.8% of variance and loaded heavily on display quality, platform fluidity, app availability, and refresh rate. Factor 2, “Economic and Service Value,” explained 23.4% of variance and was dominated by purchase price, EMI options, service network, and warranty terms. Factor 3, “Brand and Ecosystem Trust,” contributed 18.9% of variance with high loadings on brand reputation and operating system familiarity. These findings indicate that Kerala consumers evaluate smart TVs primarily on visual and platform performance, but economic and service considerations remain critical, particularly in the mid-price segment where competition is most intense.

**Platform Preference and Content Drivers.** Among Android/Google TV users, the most cited reasons for platform preference were “app availability” (cited by 78%), “familiarity with Google

interface" (64%), and "ease of casting from smartphone" (52%). Samsung Tizen users cited "brand trust" (71%) and "interface simplicity" (58%) as primary reasons for their choice. The availability of Malayalam-language content on OTT platforms did not emerge as a statistically significant differentiator between platforms ($p = 0.312$), likely because major streaming services are available across all major operating systems. However, 68% of respondents indicated that they subscribed to at least one regional-language OTT service, underscoring the content ecosystem 's role in driving smart TV adoption.

**Service Network and Regional Brand Advantage.** Qualitative interviews with retail personnel confirmed that service accessibility is a decisive factor in Kerala 's dispersed market. A sales manager at a Kozhikode electronics retailer noted that Impex's 24 company-owned service centres across Kerala provide a tangible advantage over brands that rely on third-party service partners, particularly for installation and panel-related issues. The entry of Dish TV's VZY through established Kerala retail chains—Nikshan, Pitappally, and Nandilath—similarly leverages existing distribution trust and service familiarity. Technicians interviewed noted that Android TV-based sets from value brands sometimes suffer from processor bottlenecks that degrade performance over time, a factor that informed consumers consider when weighing price against longevity.

**8. Discussion :** The findings present a Kerala smart TV market that is simultaneously convergent with and divergent from national trends. The dominance of Android/Google TV platforms (62.2% of the sample) aligns with the broader Indian pattern in which Android-based brands collectively command a substantial share. However, the specific brand configuration in Kerala reveals the importance of regional factors. Impex's 17.8% ownership share, exceeding Sony's presence in the sample, would be surprising in a national survey but is consistent with GfK data identifying Impex as Kerala's third-highest-selling television brand. This regional strength stems from a combination of factors: aggressive festival-season marketing (particularly around Onam), competitive pricing with EMI options, an extensive company-owned service network, and product differentiation through early adoption of Android 14 in QLED models.

The platform competition between Android/Google TV and Samsung's Tizen carries implications beyond app availability. Tizen's proprietary nature gives Samsung control over the user experience and advertising ecosystem, but it also means that Tizen users are excluded from certain Android-specific features and integrations. The survey finding that Tizen users prioritize "brand trust" and "interface simplicity" suggests that Samsung has successfully positioned its platform as a premium, curated alternative to the more fragmented Android ecosystem. However, the growing availability of Google TV on premium Sony and TCL models may erode this differentiation over time, as consumers increasingly associate Google TV with high-end visual performance rather than merely value-oriented products.

The service network findings are particularly consequential for market strategy. In a state where demand is distributed across Thiruvananthapuram, Kochi, Kozhikode, and numerous smaller municipalities, brands that rely on thin third-party service networks face structural disadvantages. Impex's investment in 24 company-owned service centres represents a significant fixed-cost commitment, but the payoff is evident in its superior satisfaction scores for after-sales service and value for money. Dish TV's VZY strategy of partnering with established Kerala retail chains similarly addresses the service and trust barriers that new entrants face. For national brands with weaker Kerala-specific infrastructure, closing this gap should be a priority.

The FIFA World Cup-driven demand surge reported in Kerala and West Bengal highlights the state 's responsiveness to major sporting events as purchase triggers. However, as

Counterpoint analysts caution, such spikes are seasonal rather than indicative of sustained growth. The broader smart TV market in India remained flat in 2025, with recovery expected only in the latter half of 2026. Manufacturers targeting Kerala should therefore balance event-driven promotional pushes with sustained brand-building and service investment that capture replacement demand and first-time smart TV buyers throughout the year.

**9. Conclusion :** The branded smart Android/Google TV market in Kerala is characterized by intense competition, platform pluralism, and the rising significance of regional players. Samsung and LG retain leadership positions, but their shares are more contested in Kerala than national aggregates suggest. Impex has established itself as a credible third force through a combination of competitive pricing, Android 14 product leadership, festival-aligned marketing, and—critically—a dense company-owned service network. The entry of Dish TV's VZY introduces a new competitive model that integrates DTH and OTT content without a set-top box, distributed through trusted Kerala retail chains. Android/Google TV platforms dominate ownership, but Samsung's Tizen retains a loyal base anchored in brand trust and interface simplicity. Purchase decisions are primarily driven by visual and platform performance, with economic and service considerations forming a secondary but decisive dimension in the mid-segment. Brands that invest in service accessibility, localized retail partnerships, and festival-season responsiveness will be best positioned to capture Kerala's expanding smart TV demand.

**10. Future Scope :** Future research should address several limitations and extend the present findings. First, the sample was confined to three districts and relied on convenience sampling; a probability-based sample covering all 14 districts would enhance representativeness. Second, longitudinal tracking of platform satisfaction and brand switching would clarify whether Android/Google TV's platform dominance is durable or vulnerable to Samsung's ecosystem strategies. Third, as Google TV replaces Android TV on new models, comparative studies of user experience across the two interfaces would inform both manufacturers and platform developers. Fourth, the entry of DTH operators into smart TV hardware represents a novel competitive dynamic that merits dedicated investigation, particularly regarding consumer perceptions of integrated versus standalone offerings. Finally, research into the actual performance longevity of value-brand Android TVs—specifically processor degradation and software update support—would provide practical guidance to consumers and inform regulatory discussion around smart TV repairability and software support periods.

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