

Desktop and Laptop Computers - UK - August 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

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



“Chromebooks have the potential to really shake up the laptop market and offer consumers a much cheaper alternative to mobile computing”.
– Ryan Munson, Research Analyst

This report looks at the following areas:

- How can Microsoft and computer manufacturers encourage users to upgrade to a new computer with the latest Windows operating system?
- How should Chromebook manufacturers encourage consumers to consider purchasing a Chromebook?

The meteoric rise of tablets in the last few years has had a huge impact on the desktops and laptops market, with consumers extending their PC replacement cycles and spending less when they do finally get around to buying a new model.

BUY THIS
REPORT NOW

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

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

Desktop and Laptop Computers - UK - August 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

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

Table of Contents

Introduction

Definition

Abbreviations

Executive Summary

The market

Volume

Figure 1: UK combined desktop and laptop computer market size, by volume, 2009 -19

Value

Figure 2: UK combined desktop and laptop computer market size, by value, 2009-19

Market share

Lenovo continues its rise to jump into third position

Figure 3: Estimated shares of the UK desktop and laptop market, by volume, 2012 and 2013

Market drivers

Ultrabooks and hybrids attempt to offset declining PC market

Figure 4: Worldwide device shipments, by segment, 2012 - 15

Windows 8.1 introduced to solve Windows 8 issues

New processors from Intel, Nvidia and AMD to improve laptop and Ultrabook performance

The consumer

Tablet ownership to surpass desktops in 2015

Figure 5: Household ownership of computers, April 2013 - June 2014

New form factors stimulating interest in laptops

Figure 6: Types of computers that consumers are interested in purchasing in the next 12 months, June 2014

Nine out of ten PC owners still use Windows at home

Figure 7: Operating system used on desktop and laptop PCs, June 2014

Only a quarter of Windows users have upgraded to 8/8.1

Figure 8: Version of Windows operating system used, June 2014

More than half of Windows users happy with their current version

Figure 9: Attitudes towards the Windows operating system, June 2014

Only one in five understands Chromebook's point of difference

Figure 10: Consumer awareness of Chromebooks, June 2014

Almost a third interested in buying a Chromebook

Figure 11: Interest in buying Chromebooks, among those who have heard of Chromebooks previously, June 2014

Figure 12: Interest in buying Chromebooks, among those who have not heard of Chromebooks previously, June 2014

Reliance on an internet connection the main barrier to purchase

Figure 13: Barriers to buying Chromebooks, June 2014

Bigger and sharper displays more important for desktop users

Figure 14: Factors that would be of most importance to consumers when purchasing a new desktop/laptop computer, June 2014

BUY THIS
REPORT NOW

VISIT: store.mintel.com

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

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

Desktop and Laptop Computers - UK - August 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

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

What we think

Issues and Insights

How can Microsoft and computer manufacturers encourage users to upgrade to a new computer with the latest Windows operating system?

The facts

The implications

How should Chromebook manufacturers encourage consumers to consider purchasing a Chromebook?

The facts

The implications

Trend Application

Trend: The Nouveau Poor

Trend: Return to the Experts

Mintel Futures: Access Anything Anywhere

Market Drivers

Key points

Tablet ownership continues to rise and demand remains strong

Figure 15: Household tablet ownership and plans on buying/upgrading a tablet in the next three months, by age, April 2013 – April 2014

Ultrabooks and hybrids attempt to offset declining PC market

Figure 16: Worldwide device shipments, by segment, 2012 - 15

New processors from Intel, Nvidia and AMD to improve laptop and Ultrabook performance

Windows 8.1 introduced to solve Windows 8 issues

Figure 17: Top five operating systems in the UK, by usage, January 2010 – May 2014

Growth in Chrome OS products

Sony leaves the PC market

Online reviews are influential in laptop and desktop PC purchases

Figure 18: Factors that influence the purchase of consumer laptop/desktop PCs, April 2014

Who's Innovating?

Key points

Asus introduces 3-in-1 hybrid

Figure 19: Asus Transformer Book V hybrid laptop, launching in Q4 2014

Manufacturers pushing for even thinner laptops

Dell driving wireless technology development

Apeks launches the MaxPad; the world's first Windows 8.1 touchscreen TV

Market Size, Segmentation and Forecast

Key points

Market size

Figure 20: UK combined consumer desktop and laptop computer market size, by volume and value, 2009-14

Volume trends by segment

BUY THIS
REPORT NOW

VISIT: store.mintel.com

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

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

Desktop and Laptop Computers - UK - August 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

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

Figure 21: UK desktop and laptop computer market size, by volume sales, 2009-14

Figure 22: UK desktop and laptop computer market size, by volume, 2009-19

Value trends by segment

Figure 23: UK desktop and laptop computer market size, by value sales, 2009-14

Falling ASPs begin to stabilise

Figure 24: UK average selling prices of desktop and laptop computers, 2009-14

Market forecasts

Total market

Figure 25: UK combined desktop and laptop computer market size, by volume, 2009 -19

Figure 26: UK combined desktop and laptop computer market size, by volume, 2009-19

Figure 27: UK combined desktop and laptop computer market size, by value, 2009-19

Figure 28: UK combined desktop and laptop computer market size, by value, 2009-19

Desktop computers

Figure 29: UK desktop computer market size, by volume, 2009-19

Figure 30: UK desktop computer market size, by volume, 2009-19

Figure 31: UK desktop computer market size, by value, 2009-19

Figure 32: UK desktop computer market size, by value, 2009-19

Laptop computers

Figure 33: UK laptop computer market size, by volume, 2009-19

Figure 34: UK laptop computer market size, by volume, 2009-19

Figure 35: UK laptop computer market size, by value, 2009-19

Figure 36: UK laptop computer market size, by value, 2009-19

Methodology

Market Share

Key points

Lenovo continues its rise to jump into third position

Figure 37: Estimated shares of the UK desktop and laptop market, by volume, 2012 and 2013

Companies and Products

Key points

Acer Inc

Company overview

Product range

Financials

Figure 38: Key financials for Acer Group, 2009 - 13

Recent activity

Strategy

Apple Inc.

Company overview

Product 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 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

Desktop and Laptop Computers - UK - August 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

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

Financials

Figure 39: Key financials for Apple Inc., 2009 - 13

Figure 40: Sales of Mac computers, 2009 - 2013

Recent activity

Strategy

Dell Inc

Company overview

Product range

Financials

Figure 41: Key financials for Dell, 2010 – 13

Recent activity

Strategy

Hewlett-Packard Company

Company overview

Product range

Financials

Figure 42: Key financials for Hewlett-Packard, 2009 - 13

Figure 43: Revenue by business segment for Hewlett-Packard, 2011-13

Recent activity

Strategy

Lenovo Group Ltd

Company overview

Product range

Financials

Figure 44: Key financials for Lenovo, 2010-14

Recent activity

Strategy

Samsung Electronics

Company overview

Product range

Financials

Figure 45: Key financials for Samsung Electronics Co Ltd., 2009-13

Recent activity

Strategy

Toshiba Corporation

Company overview

Product range

Financials

Figure 46: Key financials for Toshiba Corp, 2010 -14

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

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

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

Desktop and Laptop Computers - UK - August 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

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

Recent activity
Strategy

Brand Research

Brand map

Figure 47: Attitudes towards and usage of brands in the desktop and laptop computer sector, June 2014

Correspondence analysis

Brand attitudes

Figure 48: Attitudes, by desktop and laptop computer brand, June 2014

Brand personality

Figure 49: Desktop and laptop computer brand personality – macro image, June 2014

Figure 50: Desktop and laptop computer brand personality – micro image, June 2014

Brand experience

Figure 51: Desktop and laptop computer brand usage, June 2014

Figure 52: Satisfaction with various desktop and laptop computer brands, June 2014

Figure 53: Consideration of desktop and laptop computer brands, June 2014

Figure 54: Consumer perceptions of current desktop and laptop computer brand performance, June 2014

Brand recommendation

Figure 55: Likely recommendation of selected desktop and laptop computer brands, June 2014

Figure 56: Likely recommendation of selected desktop and laptop computer brands, June 2014 (continued)

Brand Communication and Promotion

Key points

Google continued to push Chromebooks in 2013

Figure 57: Advertising expenditure within the laptop and desktop computer market, 2010-13

Dell turns to social media in order to thank its customers

Figure 58: Advertising expenditure within the laptop and desktop computer market, by media type, 2010-13

The Consumer - Ownership and Plans to Purchase Computers

Key points

Tablet ownership to surpass desktops in 2015

Figure 59: Household ownership of computers, April 2013 - June 2014

Demographic breakdown

Older consumers cling to desktops

Figure 60: Household ownership of computers, by age, June 2014

New form factors stimulating interest in laptops

Figure 61: Types of computers that consumers are interested in purchasing in the next 12 months, June 2014

Gaming drives stronger interest in desktops among men

Figure 62: Types of computers that consumers are interested in purchasing in the next 12 months, by gender, June 2014

All-in-one desktops lose out to tower units

Figure 63: Types of desktop computer that consumers are interested in purchasing in the next 12 months, June 2014

**BUY THIS
REPORT NOW**

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

Desktop and Laptop Computers - UK - August 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

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

Figure 64: Types of desktop computer that consumers are interested in purchasing in the next 12 months, by gender, June 2014

Notebooks still popular with consumers

Figure 65: Types of laptop computer that consumers are interested in purchasing in the next 12 months, June 2014

Consumers open to multiple laptop formats

Figure 66: Types of laptop computer that consumers are interested in purchasing in the next 12 months, by Types of laptop computer that consumers are interested in purchasing in the next 12 months, June 2014

Ultrabooks favoured by the young

Figure 67: Types of laptop computer that consumers are interested in purchasing in the next 12 months, by age, June 2014

The Consumer – Operating System Used and Attitudes towards Windows 8/8.1

Key points

Nine out of ten PC owners still use Windows at home

Figure 68: Operating system used on desktop and laptop PCs, June 2014

Almost one fifth of 16-24s don't use Windows as their main operating system

Figure 69: Operating system used, by age, June 2014

Only a quarter of Windows users have upgraded to 8/8.1

Figure 70: Version of Windows operating system used, June 2014

Demographic breakdown

Men more likely to have upgraded to Windows 8.1

Figure 71: Users of Windows 8 and Windows 8.1, by gender, June 2014

A third of Windows users aged 16-24 have upgraded to version 8 or 8.1

Figure 72: Users of Windows 8 or Windows 8.1, by age, June 2014

More than half of Windows users are happy with their current version

Figure 73: Attitudes towards the Windows operating system, June 2014

The Consumer – Chromebooks

Key points

Only one in five consumers understands Chromebook's point of difference

Figure 74: Consumer awareness of Chromebooks, June 2014

Almost a third of consumers are interested in buying a Chromebook in the future

Figure 75: Interest in buying Chromebooks, among those who have heard of Chromebooks previously, June 2014

Figure 76: Interest in buying Chromebooks, among those who have not heard of Chromebooks previously, June 2014

Demographic breakdown

Young people more likely to have heard of Chromebooks

Figure 77: Awareness of Chromebooks, by age, June 2014

Men more likely to be aware of and have understanding of Chromebooks

Figure 78: Awareness of Chromebooks, by gender, June 2014

Men show more interest than women in Chromebooks

Figure 79: Interest in buying Chromebooks, by gender, June 2014

Reliance on the internet seen as the biggest drawback for Chromebooks

Figure 80: Barriers to buying Chromebooks, June 2014

Limited storage space and product support are barriers for 16-24s

**BUY THIS
REPORT NOW**

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

Desktop and Laptop Computers - UK - August 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

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

Figure 81: Barriers to buying Chromebooks, by age, June 2014

The Consumer – Factors Influencing Choice of Computer

Key points

Bigger and sharper displays more important for desktop users

Figure 82: Factors that would be of most importance to consumers when purchasing a new desktop/laptop computer, June 2014

Speed, responsiveness and affordability of laptops more important to women

Figure 83: Factors that would be of most importance to consumers when purchasing a new laptop computer in the next 12 months, by gender, June 2014

Appendix – Market Size and Segmentation

Figure 84: Value forecast for the UK desktop and laptop computer market, best- and worst-case scenarios, 2014-19

Figure 85: Volume forecast for the UK desktop and laptop computer market, best- and worst-case scenarios, 2014-19

Figure 86: Value forecast for the UK desktop computer market, best- and worst-case scenarios, 2014-19

Figure 87: Volume forecast for the UK desktop computer market, best- and worst-case scenarios, 2014-19

Figure 88: Value forecast for the UK laptop computer market, best- and worst-case scenarios, 2014-19

Figure 89: Volume forecast for the UK laptop computer market, best- and worst-case scenarios, 2014-19

Appendix – Brand Research

Figure 90: Brand usage, June 2014

Figure 91: Brand commitment, June 2014

Figure 92: Brand momentum, June 2014

Figure 93: Brand diversity, June 2014

Figure 94: Brand satisfaction, June 2014

Figure 95: Brand recommendation, June 2014

Figure 96: Brand attitude, June 2014

Figure 97: Brand image – macro image, June 2014

Figure 98: Brand image – micro image, June 2014

Appendix – The Consumer - Ownership and Plans to Purchase Computers

Figure 99: Household ownership of computers, June 2014

Figure 100: Household ownership of computers, by demographics, June 2014

Figure 101: Types of computer that consumers are interested in purchasing in the next 12 months, June 2014

Figure 102: Types of computer that consumers are interested in purchasing in the next 12 months, by demographics, June 2014

Figure 103: Types of desktop computer that consumers are interested in purchasing in the next 12 months, June 2014

Figure 104: Types of desktop computer that consumers are interested in purchasing in the next 12 months, by demographics, June 2014

Figure 105: Types of laptop computer that consumers are interested in purchasing in the next 12 months, June 2014

Figure 106: Types of laptop computer that consumers are interested in purchasing in the next 12 months, by demographics, June 2014

Figure 107: Types of computer that consumers are interested in purchasing in the next 12 months, by types of computer that consumers are interested in purchasing in the next 12 months, June 2014

Appendix – The Consumer - Operating Systems Used and Attitudes towards Upgrading to Windows 8/8.1

Figure 108: Operating systems used on desktops and laptops, June 2014

Figure 109: Operating systems used on desktops and laptops, by demographics, June 2014

Figure 110: Version of windows operating system used, June 2014

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

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

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

Desktop and Laptop Computers - UK - August 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

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

- Figure 111: Version of windows operating system used, by demographics, June 2014
- Figure 112: Version of windows operating system used, by demographics, June 2014 (continued)
- Figure 113: Attitudes towards the windows operating system, June 2014
- Figure 114: Attitudes towards the windows operating system, by demographics, June 2014
- Figure 115: Attitudes towards the windows operating system, by demographics, June 2014 (continued)

Appendix – The Consumer – Chromebooks

- Figure 116: Consumer awareness of Chromebooks, June 2014
- Figure 117: Consumer awareness of Chromebooks, by demographics, June 2014
- Figure 118: Interest in buying Chromebooks, among those who have heard of Chromebooks previously, June 2014
- Figure 119: Interest in buying Chromebooks, among those who have heard of Chromebooks previously, by demographics, June 2014
- Figure 120: Interest in buying Chromebooks, among those who have heard of Chromebooks previously, June 2014
- Figure 121: Interest in buying Chromebooks, among those who have not heard of Chromebooks previously, BY demographics, June 2014
- Figure 122: Interest in buying Chromebooks (all consumers), June 2014
- Figure 123: Interest in buying Chromebooks (all consumers), by demographics, June 2014
- Figure 124: Barriers to buying Chromebooks, June 2014
- Figure 125: Barriers to buying Chromebooks, by demographics, June 2014

Appendix – The Consumer - Factors that Influence Choice of Computer

- Figure 126: Factors that would be of most importance to consumers when purchasing a new desktop computer, June 2014
- Figure 127: Factors that would be of most importance to consumers when purchasing a new desktop computer, June 2014
- Figure 128: Factors that would be of most importance to consumers when purchasing a new desktop computer, June 2014 (continued)
- Figure 129: Factors that would be of most importance to consumers when purchasing a new desktop computer, June 2014 (continued)
- Figure 130: Factors that would be of most importance to consumers when purchasing a new laptop computer, June 2014
- Figure 131: Factors that would be of most importance to consumers when purchasing a new laptop computer, by demographics, June 2014
- Figure 132: Factors that would be of most importance to consumers when purchasing a new laptop computer, by demographics, June 2014 (continued)
- Figure 133: Factors that would be of most importance to consumers when purchasing a new laptop computer, by demographics, June 2014 (continued)

BUY THIS
REPORT NOW

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