

Tablet Computers and Accessories - UK - November 2015

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.



“As overall tablet penetration stalls, the gap between household and personal ownership is shrinking, thus suggesting that multi-tablet households are on the rise. As tablet manufacturers look to offset slowing adoption, the launch of use case-specific tablets can broaden the potential for product differentiation and revive consumer demand by boosting multi-tablet households.”

– Sara Ballaben, Technology Analyst

This report looks at the following areas:

- Reacting to the threat of phablets
- Tablets specialise to better serve specific consumer needs

After skyrocketing from 2010 to 2013, the tablet market showed the first signs of approaching saturation in 2014. As a result, tablet ownership started to flatten out in Q2 2015 and, in September 2015.

Several factors contributed to the market slowdown, including limited potential for product differentiation, competition from large-screen phablets and the lack of major innovative product launches in 2014 and the first half of 2015.

As phablets rise in popularity, smartphones can increasingly serve media consumption purposes and the primary use case of tablets, particularly small ones, is called into question. This contributes to explaining the market slowdown and flattening ownership levels as well as the growing popularity of large tablets and strong launch activity in the hybrid tablet segment, which are expected to help revive the market.

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

Tablet Computers and Accessories - UK - November 2015

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

Overview

What you need to know

Covered in this report

Executive Summary

Tablet market on the downtrend

Figure 1: UK tablet sales, by value and volume, 2011-15

Household ownership flattens out in 2015

Figure 2: Household ownership of tablets, January 2012-September 2015

Most accessory purchases are productivity-focused

Figure 3: Ownership of and plans to buy tablet accessories, September 2015

Tablet market strongly brand-driven

Figure 4: Important features when buying a tablet, September 2015

Men and parents willing to spend the most on a new tablet

Figure 5: Willingness to spend on a tablet, September 2015

Tablets for children are more than just toys

Figure 6: Attitudes towards tablets, September 2015

What we think

Issues and Insights

Reacting to the threat of phablets

The facts

Implications

Tablets specialise to better serve specific consumer needs

The facts

Implications

The Market – What You Need to Know

Tablet market on the downtrend

Tablets' primary use case threatened by the rise of phablets

The hybrid revolution opens up B2B potential

Tablet gaming

Tablets for kids

Non-specialist sales channels prevail

Market Size and Segmentation

Tablet market on the downtrend

Figure 7: UK tablet sales, by value and volume, 2011-15

Larger tablets are better differentiated from phablets

Figure 8: Ownership of tablets, by screen size, June 2015

**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

Tablet Computers and Accessories - UK - November 2015

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.

Market Drivers

Tablets' primary use case threatened by the rise of phablets

Figure 9: Motivations for purchasing a tablet, July 2014

Figure 10: Smartphone screen size, June 2015

The hybrid revolution opens up B2B potential

Tablet gaming

Figure 11: Gaming frequency on the devices owned/in the household, July 2015

Figure 12: BLAZE TAB Android Retro Gaming Tablet, October 2015

Figure 13: Linx Vision tablet, October 2015

Tablets for kids

Channels to Market

Non-specialist sales channels prevail

Figure 14: Websites used and stores visited to shop around for tablets, April 2015

Online pureplays account for almost a quarter of tablet purchases

Figure 15: Stores visited and websites used to buy tablets, April 2015

Key Players – What You Need to Know

Apple remains most popular tablet manufacturer

Tesco's market exit could benefit Amazon

Online-only companies extend into the hardware market

Recorded above-the-line spend drops to 2012 level

Active stylus on the rise

New evolutions of the hybrid concept

Innovative use cases for tablets

Market Share

Apple remains most popular tablet manufacturer

Figure 16: Brand(s) of tablet owned/in the household, September 2015

Tesco's market exit could benefit Amazon

Brand Research

Brand map

Figure 17: Attitudes towards and usage of selected technology brands, October 2015

Key brand metrics

Figure 18: Key metrics for selected technology brands, October 2015

Brand attitudes: Apple and Samsung closely compete on quality and innovation

Figure 19: Attitudes, by technology brand, October 2015

Brand personality: Amazon, Google and Samsung share similar upbeat image

Figure 20: Brand personality – Macro image, October 2015

Hudl and Lenovo struggle to appeal

Figure 21: Brand personality – Micro image, October 2015

**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

Tablet Computers and Accessories - UK - November 2015

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.

Brand analysis

Amazon shows strength across different metrics

Figure 22: User profile of Amazon, October 2015

Google's vibrant image appeals to younger consumers

Figure 23: User profile of Google, October 2015

All-round image gives Samsung wide appeal

Figure 24: User profile of Samsung, October 2015

Microsoft's high brand awareness and usage do not always translate into trust

Figure 25: User profile of Microsoft, October 2015

Apple enjoys exclusive positioning

Figure 26: User profile of Apple, October 2015

Lenovo struggles to determine clear positioning

Figure 27: User profile of Lenovo, October 2015

Tesco Hudl has clear budget proposition

Figure 28: User profile of Tesco Hudl, October 2015

Brand Communication and Promotion

Recorded above-the-line spend drops to 2012 level

Figure 29: Recorded above-the-line, online display and direct mail total advertising expenditure on tablets, by advertiser, 2014

TV ads account for three quarters of total above-the-line adspend

Figure 30: Recorded above-the-line, online display and direct mail total advertising expenditure on tablets, by media type, 2014

Methodology and coverage

Launch Activity and Innovation

Active stylus on the rise

Figure 31: Scriba Stylus, October 2015

New evolutions of the hybrid concept

Figure 32: Intel's concept of a tablet with foldout extension, July 2015

Figure 33: Intel's concept of a dual-tablet laptop, July 2015

Figure 34: Qwerkywriter, October 2015

Lenovo's YOGA Tab 3 Pro features an improved built-in projector

Figure 35: YOGA Tab 3 Pro, October 2015

Meet the household tablet

Figure 36: Lenovo's Yoga Home 500, October 2015

Figure 37: Xess tablet, October 2015

Making tablets hands-free

Figure 38: EzilStein hands-free tablet stand, October 2015

The Consumer – What You Need to Know

Household ownership flattens out in 2015

Growth of personal ownership could drive multi-tablet households

**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

Tablet Computers and Accessories - UK - November 2015

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.

Most accessory purchases are productivity-focused
 Tablet market strongly brand-driven
 Men and parents willing to spend the most on a new tablet
 Tablets for children seen as entertainment and education tools
 In-store initiatives to push hybrid tablets

Tablet Ownership

Household ownership flattens out in 2015
 Figure 39: Household ownership of tablets, January 2012-September 2015
 Growth of personal ownership could drive multi-tablet households
 Figure 40: Personal and household ownership of tablets, September 2013-September 2015
 Figure 41: Repertoire of brand(s) of tablet owned/in the household, September 2015

Tablet Accessories – Ownership and Plans to Buy

Most accessory purchases are productivity-focused
 Figure 42: Ownership of and plans to buy tablet accessories, September 2015
 Figure 43: HP's Envy Note 8, October 2015
 Cockpit use cases could drive tablet demand

Important Features of Tablets

Tablet market strongly brand-driven
 Figure 44: Important features when buying a tablet, September 2015
 Lighter tablets could win women over
 Bigger screens to appeal to tech-savvy older consumers
 Budget tablets should get rugged

Willingness to Spend

Men and parents willing to spend the most on a new tablet
 Figure 45: Willingness to spend on a tablet, September 2015
 Some tablet features can drive up willingness to spend
 Figure 46: Important features when buying a tablet, by willingness to spend on a tablet, September 2015

Attitudes towards Tablets

Tablets for children are more than just toys
 Figure 47: Attitudes towards tablets, September 2015
 In-store initiatives to push hybrid tablets
 Figure 48: Ownership of selected tablet accessories, by agreement with selected attitudes towards tablets, September 2015
 Tablets could be at the centre of the smart home

Appendix – Data Sources, Abbreviations and Supporting Information

Data sources
 Abbreviations
 Brand research

**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

Tablet Computers and Accessories - UK - November 2015

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.

Brand map

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