

Report Price: £3215.29 | \$3995.00 | €3762.21

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



This Report tracks trends in ownership of electronics, intent to purchase electronics, hardware used to access the internet, and online activities, separating definite shifts in consumer behavior from the hype often associated with mainstream reporting.

- Billy Hulkower, Senior Technology Analyst

# This report looks at the following areas:

- Smartphones edging out dedicated portables
- Smartphone adoption nearly complete
- Disappointing holiday season for wearables

Findings include the lasting desirability of PCs even during the continuing transition to mobile computing, the adoption of new interfaces in living room hardware, the shift to streaming media consumption, the slow pace of adoption for wearable tech, and a growing interest in smart home hardware.

# BUY THIS REPORT NOW

**VISIT:** store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

+86 (21) 6032 7300

+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



Report Price: £3215.29 | \$3995.00 | €3762.21

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

Definition

#### **Executive Summary**

The issues

#### Smartphones edging out dedicated portables

Figure 1: Ownership of dedicated portables, February 2016 vs January 2017

#### Smartphone adoption nearly complete

Figure 2: Smartphone and tablet ownership, April 2015 vs January 2017

#### Disappointing holiday season for wearables

Figure 3: Ownership of wearable tech, June 2016 vs January 2017

The opportunities

#### Mobile web to drive phablet sales

Figure 4: Methods of internet access, April 2015 vs January 2017

#### Smart home, smart wearables

Figure 5: Interest and ownership of new tech products, January 2017

# Living room OS

Figure 6: Smart TV, home gaming console, and streaming media player ownership, April 2015 vs January 2017

What it means

# The Market - What You Need to Know

Median income bright spot

#### **Market Factors**

# Population of young adults

Figure 7: US population by age, 2012-22

## Households with children

Figure 8: Households with related children, 2006-16

#### Median income

Figure 9: Median household income, in inflation-adjusted dollars, 2010-15

#### **Key Trends - What You Need to Know**

Climbing penetration for smart TV, streaming players

Televisions integrate streaming players

Smartphones approaching universal penetration

Thermostat and convertible laptop/tablet carry high interest

Children's market last refuge for portables

What's Working?



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



Report Price: £3215.29 | \$3995.00 | €3762.21

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

#### Living room OS

Figure 10: Smart TV, home gaming console, and streaming media player ownership, April 2015 vs January 2017

#### Smartphones approaching universal penetration

Figure 11: Personal ownership of laptops, tablets, and smartphones, April 2015 vs January 2017

#### What's Struggling?

#### Buyers losing interest in e-readers, consoles

Figure 12: Planned tech purchases in next year, February 2016 vs January 2017

#### What's Next?

#### Smart home, convertibles, digital assistants, VR

Figure 13: Ownership and interest in new tech products, January 2017

#### The Consumer - What You Need to Know

Internet access via smartphone and TV on the rise

Video, music, gaming all make gains

Wearables disappoint

Large households get entertainment

TVs, laptops, smartphones most desired purchases

#### **Trends in Online Activities**

#### A/V communications gain adherents

Figure 14: Communication conducted online, April 2015 vs January 2017

### Video most popular, but gaming rising more rapidly

Figure 15: Media usage online, April 2015 vs January 2017

#### Role of gender limited

Figure 16: Media usage online, by gender, January 2017

#### Half of online adults review products

Figure 17: Personal activities conducted online, April 2015 vs January 2017

#### Role of age

Figure 18: Personal activities conducted online, by age, January 2017

#### **Hardware Used for Online Activities**

#### Home PC, phone most common access points

Figure 19: Devices used to access the internet, April 2015 vs January 2017

#### 18-44s ditch desktop platform

Figure 20: Use of PC and phone to access internet, by age, January 2017  $\,$ 

#### Young adults access web on televisions

Figure 21: Devices used to access internet, by age, January 2017

#### Phones drive multimedia communication

Figure 22: Activities conducted by device I, PC vs phone, January 2017

#### PC usage favored for text, video

Figure 23: Activities conducted by device II, PC vs phone, January 2017

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



Report Price: £3215.29 | \$3995.00 | €3762.21

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

#### **Household Tech Ownership**

#### Desktops stay course, UHD builds steam

Figure 24: Household ownership of desktop PCs, smart and UHD TV, and playback hardware, January 2017

#### Consoles surpass DVD players in penetration

Figure 25: Household ownership of DVD and Blu-ray players, January 2017

Figure 26: Household ownership of desktop PCs, smart TVs, and gaming consoles, by age, January 2017

#### Larger households invest in entertainment

Figure 27: Household ownership of entertainment technology, by household size, January 2017

#### Household income level provides demarcation for segmentation

Figure 28: Household ownership of entertainment technology, by household income, January 2017

#### **Personal Tech Ownership**

#### Mobile computing continues gains

Figure 29: Personal ownership of laptops, tablets, and smartphones, April 2015 vs January 2017

#### Holiday season shows little gain in penetration for wearables

Figure 30: Personal ownership of fitness trackers, smartwatches, and wearable cameras, June 2016 vs January 2017

#### Opportunity among high-income groups

Figure 31: Smartphone ownership, by age, January 2017

Figure 32: Smartphone ownership, by household income, January 2017

# Enduring hope for portable consoles, smartwatch

Figure 33: Portable console and smartwatch ownership, by age, January 2017

#### **Purchase Intent**

# Television, smartphones, laptops most desired

Figure 34: Planned tech purchase in next year, January 2017

## Age predominant factor in planned purchases

Figure 35: Planned tech purchase in next year, by age, January 2017

# $\label{eq:Ageplays} \textit{Age plays role in planned purchases among urbanites, Hispanics, Asians}$

Figure 36: Planned tech purchase in next year, by race and Hispanic origin, January 2017

Figure 37: Planned tech purchase in next year, by location of residence, January 2017

## **Appendix - Data Sources and Abbreviations**

Data sources

Consumer survey data

Abbreviations and terms

Abbreviations

Terms

APAC +61 (0) 2 8284 8100 | **EMAIL:** reports@mintel.com