

Report Price: £1995.00 | \$2693.85 | €2245.17

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



"Despite continuing declines in the desktop, laptop and tablet market, the laptop segment has fared better because smartphones and tablets remain less suitable for performing productive tasks. It is hoped that cellular devices and two-in-one laptops will appeal to consumer desire for ultra-portability, and these devices offer a decisive upgrade path for current owners."

- Andrew Moss, Consumer Technology Analyst

This report looks at the following areas:

- Ultra-portability meets productive computing
- The mature market needs people to upgrade, but there is little incentive to do so

# 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

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



Report Price: £1995.00 | \$2693.85 | €2245.17

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

Products covered in this Report

#### **Executive Summary**

The market

Home computing market worth over £3 billion

All-in-ones unlikely to turn around the declining desktop market

Ultra-portability may slow laptop sales decline

Lack of innovation restricts the tablet market

Figure 1: Forecast for the value of the UK desktop, laptop and tablet market, 2013-23

Figure 2: Forecast for the volume of the UK desktop, laptop and tablet market, 2013-23

Tablet market plateau puts emphasis on upgrades

Always-connected PCs trying to make laptops portable again

Companies and brands

Apple leads volume share with continued tablet dominance

HP the leading laptop supplier

Interest building for the Galaxy Tab S4

macOS update brings privacy and productivity enhancements

The consumer

Laptop ownership remains relatively stable

Smartphone ubiquity a challenge for home computing

Figure 3: Household ownership of computing devices, May 2018

Clamshell laptops maintain dominant presence in the home

Figure 4: Laptop form factors owned or have in the household, May 2018

Desktops continue shift away from tower units

Figure 5: Desktop form factors owned or have in the household, May 2017 and May 2018

Reassuring purchasing consideration from current owners

Figure 6: Device purchase consideration, by device ownership, May 2018

Consumers don't like change, but might make an exception for two-in-ones

Figure 7: Specific form factor considered amongst those considering a laptop purchase, May 2018

Figure 8: Specific form factor considered amongst those considering a tablet purchase, May 2018

Interest in tower units remains high despite growth of the all-in-one

Figure 9: Specific form factor considered amongst those considering a desktop purchase, May 2018

Security concerns may influence device upgrades

Figure 10: Activities performed on devices in the home, May 2018

Laptops remain the popular choice for online shopping

Advanced computing unnecessary for a third of device owners

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



Report Price: £1995.00 | \$2693.85 | €2245.17

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

Figure 11: Consumer attitudes towards home computing, May 2018

A quarter interested in desktop computing through a portable device

Despite a slow upgrade cycle, most will still replace their laptops when they break

Figure 12: Consumer behaviour towards home computing, May 2018

What we think

#### **Issues and Insights**

Ultra-portability meets productive computing

The facts

The implications

The mature market needs people to upgrade, but there is little incentive to do so

The facts

The implications

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

Home computing market worth over £3 billion

All-in-ones unlikely to turn around the declining desktop market

Laptop segment reliant on upgrades

Lack of innovation restricts the tablet market

Convertible keyboards bridge the gap between markets

Always-connected PCs trying to make laptops portable again

The crypto craze inflating graphics card prices

Meltdown and Spectre vulnerabilities dent confidence

# **Market Size and Forecast**

#### Home computing market worth over £3 billion

Figure 13: Forecast for the value of the UK desktop, laptop and tablet market, 2013-23

Figure 14: Forecast for the value of the UK desktop, laptop and tablet market, 2013-23

Figure 15: Forecast for the volume of the UK desktop, laptop and tablet market, 2013-23  $\,$ 

Forecast methodology

# **Market Segmentation**

All-in-ones unlikely to turn around the declining desktop market

#### Desktops an attractive option for their upgradability

Figure 16: Forecast for the value of the UK desktop market, 2013-23

Figure 17: Forecast for the volume of the UK desktop market, 2013-23

# Laptop segment reliant on upgrades

# Chromebooks and two-in-one technology matures

Figure 18: Forecast for the value of the UK laptop market, 2013-23  $\,$ 

Figure 19: Forecast for the volume of the UK laptop market, 2013-23

# Lack of innovation restricts the tablet market

Figure 20: Forecast for the value of the UK tablet market, 2013-23

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



Report Price: £1995.00 | \$2693.85 | €2245.17

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

Figure 21: Forecast for the volume of the UK tablet market, 2013-23

#### **Market Drivers**

#### Tablet market plateau puts emphasis on upgrades

Figure 22: Household ownership of computers, January 2012-April 2018

Convertible keyboards bridge the gap between markets

Cloud-based processing brings AAA games to any computer

Always-connected PCs trying to make laptops portable again

The crypto craze inflating graphics card prices

Figure 23: GeForce GTX 1080 price history, January 2017-June 2018

Figure 24: RAM (DDR3-1333) price history, January 2017-June 2018

Meltdown and Spectre vulnerabilities dent confidence

#### Companies and Brands - What You Need to Know

Apple leads volume share with continued tablet dominance

HP largest in the laptop and desktop segments

Intel and Sprint work towards 5G releases

macOS update brings privacy and productivity enhancements

Microsoft launches budget Surface Go model

Microsoft marketing is redefining laptops

#### **Market Share**

Apple leads volume share with continued tablet dominance

Microsoft Surface a sizeable part of 'Others'

Figure 25: Estimated share of the desktop, laptop and tablet market, by volume, 2018

## **Launch Activity and Innovation**

Intel and Sprint work towards 5G releases

Interest building for the Galaxy Tab S4

macOS update brings privacy and productivity enhancements

Project Precog from Asus

Microsoft launches budget Surface Go model

# **Advertising and Marketing Activity**

Microsoft marketing is redefining laptops

Retailers promoting high street sales

Figure 26: Total above-the-line, online display and direct mail advertising expenditure on desktop, laptop and tablet computers, and their peripherals, May 2017-April 2018

Nielsen Ad Intel coverage

# **Brand Research**

# Brand map

Figure 27: Attitudes towards and usage of selected brands, May 2018

Key brand metrics

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



Report Price: £1995.00 | \$2693.85 | €2245.17

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

Figure 28: Key metrics for selected brands, May 2018

Brand attitudes: Samsung trustworthy and associated with high quality

Figure 29: Attitudes, by brand, May 2018

Brand personality: Apple's exclusivity breeds demand

Figure 30: Brand personality - macro image, May 2018

HP's reliability and affordability make it accessible to many

Figure 31: Brand personality - micro image, May 2018

Brand analysis

Samsung seen as an innovative option whilst remaining affordable

Figure 32: User profile of Samsung, May 2018

Apple Mac an exclusive and prestigious choice

Figure 33: User profile of Apple Mac, May 2018

Amazon Fire benefits from the growing Alexa ecosystem

Figure 34: User profile of Amazon Fire, May 2018

The Microsoft Surface seen as a premium purchase

Figure 35: User profile of Microsoft Surface, May 2018

Hewlett-Packard a well-known brand with broad appeal

Figure 36: User profile of Hewlett-Packard, May 2018

Lenovo seen by older users as a cheap and user-friendly brand

Figure 37: User profile of Lenovo, May 2018

Dell a well-known brand but lacking innovation

Figure 38: User profile of Dell, May 2018

Acer a suitable brand for students on a budget

Figure 39: User profile of Acer, May 2018

# The Consumer - What You Need to Know

Laptop ownership remains relatively stable

Smartphone ubiquity a challenge for home computing

Chromebook adoption remains relatively low

Desktops continue shift away from tower units

Detachable keyboards gaining popularity

Reassuring purchasing consideration from current owners

Tablets still an enticing item for non-owners

Consumers don't like change, but might make an exception for two-in-ones

Low-intensity computing creates a market for scaled-back devices

Laptops remain the popular choice for online shopping

Advanced computing unnecessary for a third of device owners

More prefer cloud storage than local

Laptops currently a device for the home

**Desktop, Laptop and Tablet Computer Ownership** 

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



Report Price: £1995.00 | \$2693.85 | €2245.17

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

#### Laptop ownership remains relatively stable

#### Smartphone ubiquity a challenge for home computing

Figure 40: Household ownership of computing devices, May 2018

#### Clamshell laptops maintain dominant presence in the home

#### Chromebook adoption remains relatively low

Figure 41: Laptop form factors owned or have in the household, May 2018

#### Windows keeps broad appeal

Figure 42: Laptop operating systems, May 2018

#### Desktops continue shift away from tower units

## Older people prefer desktops in general, but also the newer all-in-ones

Figure 43: Desktop form factors owned or have in the household, May 2017 and May 2018

#### Windows the choice for gamers

Figure 44: Operating system on desktops, by type of desktop, May 2018

# Detachable keyboards gaining popularity

Figure 45: Proportion of tablet owners with a tablet that has a detachable keyboard, May 2018

#### Android and iOS dominant on mobile

Figure 46: Tablet operating systems, May 2018

# **Purchase Consideration**

#### Reassuring purchasing consideration from current owners

# Tablets still an enticing item for non-owners

Figure 47: Device purchase consideration, by device ownership, May 2018

# Consumers don't like change, but might make an exception for two-in-ones

Figure 48: Specific form factor considered amongst those considering a laptop purchase, May 2018

Figure 49: Specific form factor considered amongst those considering a tablet purchase, May 2018

## Interest in tower units remains high despite growth of the all-in-one

Figure 50: Specific form factor considered amongst those considering a desktop purchase, May 2018

Figure 51: Specific form factor considered amongst those considering a desktop purchase, by whether they use any device for gaming, May 2018

# **Home Computing Activities**

# Low-intensity computing creates a market for scaled-back devices

#### Video streaming services' potential for growth

Figure 52: Activities performed on any device, May 2018

# Security concerns may influence device upgrades

Figure 53: Activities performed on devices in the home, May 2018

# Laptops remain the popular choice for online shopping...

...and are far more likely to be used for productive work

Laptops closing the gap with desktops for gaming

# **Correspondence Analysis**

Methodology



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



Report Price: £1995.00 | \$2693.85 | €2245.17

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

#### Laptops remain the choice for productivity and security

Figure 54: Correspondence analysis of words and devices, May 2018

Figure 55: Words associated with types of devices, May 2018

## **Home Computing Attitudes and Behaviour**

Advanced computing unnecessary for a third of device owners

More prefer cloud storage than local

Figure 56: Consumer attitudes towards home computing, May 2018

Laptops currently a device for the home...

...but innovation may encourage this mobile activity

A quarter interested in desktop computing through a portable device

Despite a slow upgrade cycle, most will still replace their laptops when they break

Figure 57: Consumer behaviour towards home computing, May 2018

# Appendix - Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

# Appendix - Market Size and Forecast

#### Total market forecast

Figure 58: Forecast for the value of the UK desktop, laptop and tablet computer market, 2018-23

Figure 59: Forecast for the volume of the UK desktop, laptop and tablet computer market, 2018-23

# Desktop segment forecast

Figure 60: Forecast for the value of the UK desktop computer market, 2018-23

Figure 61: Forecast for the volume of the UK desktop computer market, 2018-23

## Laptop segment forecast

Figure 62: Forecast for the value of the UK laptop computer market, 2018-23  $\,$ 

Figure 63: Forecast for the volume of the UK laptop computer market, 2018-23

# Tablet segment forecast

Figure 64: Forecast for the value of the UK tablet computer market, 2018-23

Figure 65: Forecast for the volume of the UK tablet computer market, 2018-23  $\,$ 

Forecast methodology