

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.



"The nascent foldable phone segment remains the most interesting one, but is a device category that is still a long way away from seeing mainstream adoption."

- Matt King, Category Director, Technology and Media Research

# This report looks at the following areas:

The majority of competition is still focused around core features like battery, screen and camera quality, and manufacturers are continuing to invest heavily in these areas, particularly in mid-range devices.

# 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



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**

#### Covered in this Report

#### **Executive Summary**

#### Smartphones remain the most-purchased device

Figure 1: Technology products bought in the last three months, June 2017-September 2019

#### Fitness band ownership and shipments still higher than smartwatches

Figure 2: Ownership of wearable devices, November 2014-September 2019

#### Laptops the main devices for online shopping overall, but under-25s are platform-agnostic

Figure 3: Online activities done in the last three months on a desktop/laptop, June 2017-September 2019

Figure 4: Online activities done in the last three months on a smartphone, June 2017-September 2019

#### More than half of smartphone owners cutting down screen time

Figure 5: Smartphone activities cut down on in the last six months, September 2019

Figure 6: Laptop, desktop or tablet activities cut down on in the last six months, September 2019

Figure 7: Cut down on any smartphone activities or laptop/desktop/tablet activities in the last six months, September 2019

#### Deleting apps the most common means of cutting down

Figure 8: Methods used to cut down on smartphone, tablet, laptop or desktop computer activity in the last 6 months, September 2019

## **Headline Data - Technology Ownership and Purchasing**

#### Recent purchasing

#### Key points

Figure 9: Technology products bought in the last three months, June 2017-September 2019

# Planned purchasing

#### Key points

Figure 10: Technology products plan to buy in the next three months, June 2017-September 2019

#### Mobile phone ownership

#### Key points

Figure 11: Ownership of mobile phones, January 2012-September 2019

### Wearable technology ownership

#### Key points

Figure 12: Ownership of wearable devices, November 2014-September 2019

#### Other personal technology ownership

#### Key points

Figure 13: Ownership of digital/video cameras and portable games consoles, December 2013-September 2019

## Computer ownership

#### Key points

Figure 14: Ownership of computers, January 2012-September 2019

#### Computer form factors

Key points



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 15: Types of laptop and desktop owned. June 2017-September 2019

#### TV ownership

#### Key points

Figure 16: Household ownership of HD and Ultra HD 4K televisions, July 2016-September 2019

#### TV connectivity

#### Key points

Figure 17: Household TV connectivity, January 2019-September 2019

#### Other household technology ownership

#### Key points

Figure 18: Ownership of other household technology products, January 2012-September 2019

#### **Headline Data - Online Activities**

#### Digital activities on computers, tablets and smartphones

#### Key points

Figure 19: Online activities done in the last three months on any device\*, June 2017-September 2019

Figure 20: Online activities done in the last three months on a desktop/laptop, June 2017-September 2019

Figure 21: Online activities done in the last three months on a tablet, June 2017-September 2019

Figure 22: Online activities done in the last three months on a smartphone, June 2017-September 2019

#### Other digital activity

#### Key points

Figure 23: Other digital activity in the last three months, April 2017-September 2019

#### Headline Data - Special Focus: Cutting Down on Screen Time

#### Smartphone, PC and tablet activities people have cut down on

## Key points

Figure 24: Smartphone activities cut down on in the last six months, September 2019

Figure 25: Laptop, desktop or tablet activities cut down on in the last six months, September 2019

Figure 26: Cut down on any smartphone activities or laptop/desktop/tablet activities in the last six months, September 2019

## Other digital activities people have cut down on

#### Key points

Figure 27: TV or gaming cut down on in the last six months, September 2019

#### Methods used to cut down

# Key points

Figure 28: Methods used to cut down on smartphone, tablet, laptop or desktop computer activity in the last 6 months, September 2019

# **Key Consumer Trends and Product Launches**

#### More foldable phones arriving

Figure 29: Motorola Razr

## Competition in core features continues

Pushing boundaries in the mid-range

Looking to 5G for growth in 2020



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 still the workhorses of the tech world

Big guns shoot for share of replacement market

Figure 30: Samsung Galaxy Book S

Companies look for new ways to embed voice into everyday lives

BBC and NatWest move to make their voices heard

Smartwatch growth continues but fitness band ownership remains higher

A more advanced health and fitness focus

Figure 31: Michael Kors Access MKGO

Tapping into platform-agnostic shopping habits

A mobile Christmas?

#### **Insight: Targeting the New Generation of Platform-agnostic Shoppers**

What we've seen

The PC remains the main shopping device, but not for the under-25s

Figure 32: Online activities done in the last three months on desktop/laptop computers and smartphones, September 2019

Figure 33: Online activities done in the last three months on desktop/laptop computers and smartphones by 16-24s, September 2019

Make shopping social - and immediate

Figure 34: Instagram Checkout

Use social platforms as a test bed for new technology activations

Figure 35: Snapchat visual search

Figure 36: WeMakeUp, AR Ad on Facebook

Be ready to chat

Figure 37: Use of instant messaging on smartphones and desktop/laptop computers, September 2019

Figure 38: Just Eat Facebook Messenger chatbot

What it means

#### **Insight: Tapping into the Desire for Digital Detox**

What we've seen

More than half of smartphone owners trying to cut down on screen time  $% \left( \frac{1}{2}\right) =\frac{1}{2}\left( \frac{1}{2}\right) =\frac{1}{$ 

Figure 39: Smartphone activities cut down on in the last six months, September 2019

Implications for tech platforms and the brands that use them

Opportunities exist beyond bans and challenges

Figure 40: "The Phone Cleanse", from Xfinity Mobile

Making timely interventions will be welcomed

Brands are in danger of falling foul of an "all or nothing" approach by consumers

Brands from all sectors can get involved

Target employers with the incentive of staff retention  $% \left( 1,...,N\right) =\left( 1,...,N\right)$ 

What it means

**Insight: Healthy Outlook for the Smartwatch Market** 

What we've seen



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.

Smartwatch manufacturers taking the health message to heart

Figure 41: Withings Move ECG and Health Mate app

Medical monitoring is the key message ...

... as big tech brands target healthcare

Dealing in data

Devices offering holistic health solutions will win market share

Figure 42: Moodbeam One bracelet

Figure 43: Ava fertility tracking bracelet

What it means

**Appendix - Data Sources, Abbreviations and Supporting Information** 

Data sources

Abbreviations