

Laptops and Desktop Computers - US - August 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

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



“The computer market does not lack for innovation. In fact, so much effort has been placed in product development that the industry may have temporarily stepped ahead of consumer taste and awareness, and run into problems that can be tackled via marketing rather than an endless stream of new technologies and functionality.”

– Billy Hulkower, Senior Technology Analyst

This report looks at the following areas:

- Are convertibles the answer to sector woes?
- Can the desktop be the new television?
- How many computing devices does a household need?

Recent news for the PC industry has been poor. Global shipments are falling at historical rates in 2013. However, only a fraction of current computer owners see tablets as a reasonable replacement for a computer—most owners want a keyboard, substantial storage space, and a more powerful tool for productivity. Even as a market in decline, the PC remains a critical piece of the digital life, and one that merits substantial branding campaigns. This report provides the research, insights, and innovations necessary to brand survival as the PC market contracts in the near term, and evolves in the long term.

This report builds on the analysis presented in Mintel's PCs—U.S., August 2012. The report covers desktop and laptop computers, including all-in-one (AIO) PCs, ultralights netbooks, and convertible laptop/tablets sold with a hard keyboard and marketed as a computer. Tablets are only discussed as a competitive product. Peripheral hardware, software, and online services are not the focus of this report, and are only discussed as drivers where relevant.

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:
oxygen@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

Laptops and Desktop Computers - US - August 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Table of Contents

Scope and Themes

What you need to know

Definition

Data sources

Sales data

Consumer survey data

Abbreviations and terms

Abbreviations

Terms

Executive Summary

The market

Mature market offers few new buyers

Figure 1: U.S. laptop and desktop PC sales 2008-13

Slowdown in decline in average spend on a PC

HP, Apple, Acer on the rise

Figure 2: Brand of PC most recently purchased, by date of acquisition, July 2012-March 2013

The consumer

Room for growth in laptop ownership among high-income consumers

Figure 3: Household ownership of laptop and desktop computers, by household income, July 2012-March 2013

Machine failure top reason for new purchase

Figure 4: Top five reasons for most recent PC purchase, June 2013

Broad but lukewarm appeal for new features

Figure 5: Interest in select new features if buying a new PC, June 2013

Portability has its limits

Figure 6: Attitudes toward PC hardware form, June 2013

Long-term loyalty almost absent

Figure 7: Role of brand familiarity in last computer purchase, June 2013

What we think

Issues and Insights

Are convertibles the answer to sector woes?

The issues

The implications

Can the desktop be the new television?

The issues

The implications

How many computing devices does a household need?

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: oxygen@mintel.com

Laptops and Desktop Computers - US - August 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

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

The issues

The implications

Trend Application

Inspire Trend: The Suite Life

Inspire Trend: Many Mes

Mintel Futures: Access Anything, Anywhere

Market Size

Key points

Extended decline

Figure 8: U.S. PC sales in current dollars, 2008-13

Figure 9: U.S. PC sales at inflation-adjusted prices, 2008-13

Unit sales and average price both falling

Figure 10: U.S. PC unit sales, 2008-13

Declines in pricing decelerating

Figure 11: Cost of most recently acquired computer, July 2008-March 2013

Competitive Context

Tablets not the villain

Figure 12: Most likely replacement purchase when current PC breaks, by age, June 2013

Leading Companies

Key points

Dell's losses gained by Apple, HP, Acer

Figure 13: Computer brand most recently purchased, by date of acquisition, July 2012-March 2013

Figure 14: Computer brand most recently acquired, by household income, July 2012-March 2013

Figure 15: Computer brand most recently acquired, by age, July 2012-March 2013

Figure 16: Cost of most recently acquired PC, by brand, July 2012-March 2013

Dell slides in purchase intent

Figure 17: Computer brand intended for purchase, July 2010-March 2013

Figure 18: Computer brand intended for purchase, by household income, July 2012-March 2013

Innovations and Innovators

Laptop/tablet convertibles

Figure 19: Sony VAIO Duo 13

Figure 20: Dell XPS 12 Convertible

Figure 21: Asus Transformer Book Trio

Gesture-based computing

Social Media

Key points

Key social media 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 | APAC +61 (0) 2 8284 8100
EMAIL: oxygen@mintel.com

Laptops and Desktop Computers - US - August 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Figure 22: Key brand metrics, PC brands, June 2013

Market overview

Ownership and recent purchase

Figure 23: Ownership and recent purchase of selected PC brands, June 2013

Interaction with brands

Figure 24: Interaction with selected PC brands, June 2013

Online conversations

Figure 25: Online mentions of selected Tier 1 PC brands, by week, July 22, 2012-July 21, 2013

Figure 26: Online mentions of selected Tier 2 PC brands, by week, July 22, 2012-July 21, 2013

Where are people talking about PC brands?

Figure 27: Mentions by page type selected PC brands, by tier, July 22, 2012-July 21, 2013

What are people talking about?

Figure 28: Mentions by type of conversation, on selected PC brands, by tier, July 22, 2012-July 21, 2013

Figure 29: Major areas of discussion surrounding PC brands, by page type, July 22, 2012-July 21, 2013

Brand analysis

Dell

Figure 30: Dell key social media indicators, July 2013

Key online campaigns

What we think

Lenovo

Figure 31: Lenovo key social media indicators, July 2013

Key online campaigns

What we think

HP

Figure 32: HP key social media indicators, July 2013

Key online campaigns

What we think

Acer

Figure 33: Acer key social media indicators, July 2013

Key online campaigns

What we think

Ultrabook

Figure 34: Ultrabook key social media indicators, July 2013

Key online campaigns

What we think

Chromebook

Figure 35: Chromebook key social media indicators, June 2013

Key online campaigns

What we think

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: oxygen@mintel.com

Laptops and Desktop Computers - US - August 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Marketing Strategies

Overview

Cooperative efforts seek to prop up market

Apple treads water

Cross-platform initiatives

Intel and Toshiba shine with second foray into "social film"

Corporate brands burnish images with cause-related marketing

TV campaigns

Google Chromebook

Figure 36: Google Chromebook, "For everyone" television ad

Apple MacBook Pro

Dell's two-pronged approach

Figure 37: Dell Ultrabooks, "Meet Thomas" television ad

Figure 38: Dell Ultrabook, "Disappearing stars" television ad

HP

Lenovo and Acer go to cinematic extremes

Figure 39: Lenovo "seize the night" television ad

Figure 40: Acer/Star trek into darkness television ad

Intel Ultrabook co-op with Best Buy

Figure 41: Ultrabook convertible "Egypt" Television ad

Computer Ownership

Key points

Growth needs to come out of competitor's share

Figure 42: Personal and household ownership of computers, July 2008-March 2013

Age, income, education drive ownership

Figure 43: Household ownership of laptop and desktop computers, by age, July 2012-March 2013

Figure 44: Personal ownership of a computer, by age, July 2012-March 2013

Figure 45: Household ownership of laptop and desktop computers, by household income, July 2012-March 2013

Figure 46: Personal ownership of a computer, by household income, July 2012-March 2013

Intent to Purchase

Key points

One in five households in the market

Figure 47: Intent to purchase a computer and when, by age, July 2012-March 2013

Figure 48: Intent to purchase a computer and when, by household income, July 2012-March 2013

Figure 49: Cost of computer most recently acquired, by household income, July 2012-March 2013

Purchase cycle

Figure 50: When PC was last purchased, by household income, July 2012-March 2013

Figure 51: When PC was last purchased, by presence of children in household, July 2012-March 2013

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: oxygen@mintel.com

Laptops and Desktop Computers - US - August 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Figure 52: When PC was last purchased, by age, July 2012-March 2013

Laptops dominate purchase intent

Figure 53: Computer types intended for purchase—laptops vs. desktops, by age, July 2012-March 2013

Figure 54: Computer types intended for purchase—laptops vs. desktops, by household income, July 2012-March 2013

New forms gaining traction

Figure 55: Type of laptop and desktop intended for purchase, by age, June 2013

Attitudes toward Brands

Key points

Familiarity a must

Figure 56: Role of brand familiarity in computer selection, June 2013

Reviews make only a dent

Figure 57: Role of recommendations in computer selection, June 2013

Long-term loyalty almost absent

Figure 58: Perception of quality differences between, and loyalty to computer brands, by age, June 2013

Figure 59: Perception of quality differences between, and loyalty to computer brands, by household income, June 2013

Motivations for Purchasing

Key points

Broken machines lead motivation for purchase

Figure 60: Motivation for most recent computer purchase, by gender and age, June 2013

Key driver analysis – purchase motivation

Methodology

Age, 3-D drive interest in near-term planned purchasing

Figure 61: Key drivers of planning to purchase computer within six months, August 2013

Computer Forms and Features

Key points

Traditional laptops remain best bid for volume sales

Figure 62: Type of computer most recently purchased, by year of acquisition, July 2012-March 2013

Figure 63: Attitudes toward computer hardware, June 2013

Figure 64: Attitudes toward computer hardware, by age, June 2013

New features: Broad interest, lukewarm appeal

Figure 65: Interest in new computer features, June 2013

Figure 66: "Very interested" in new computer features, by age, June 2013

Figure 67: "Very" and "somewhat" interested in new computer features, by age, June 2013

Impact of Gender and Age

Key points

Young men want it all

Figure 68: "Very interested" in new computer features, by gender and age, June 2013

The male compromise: two machines

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: oxygen@mintel.com

Laptops and Desktop Computers - US - August 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Figure 69: Sentiments promoting the traditional laptop, by gender and age, June 2013

Young men on the market most often

Figure 70: Incidence of buying a computer every two to three years, by gender and age, June 2013

Young men driving newest categories

Figure 71: Types of PCs owned, by gender and age, June 2013

Figure 72: Motivation for most recent PC purchase, by gender and age, June 2013

Impact of Marital and Parental Status

Key points

Partners, owners, and gift givers

Figure 73: Personal ownership of a computer, by marital status and presence of children, July 2012-March 2013

Figure 74: "Very interested" in new computer features, by gender and parental status, June 2013

Figure 75: Types of PCs owned, by gender and parental status, June 2013

Impact of Race and Hispanic Origin

Key points

Asians hold unique place in market

Figure 76: Household ownership of laptops and desktop computers, and average # owned, by race and Hispanic origin, July 2012-March 2013

Figure 77: Personal ownership of computers, by race and Hispanic origin, July 2012-March 2013

Figure 78: Intent to purchase a computer and when, by race and Hispanic origin, July 2012-March 2013

Figure 79: Cost of computer most recently acquired, by race and Hispanic origin, July 2012-March 2013

Figure 80: Computer brand most recently purchased, by race and Hispanic origin, July 2012-March 2013

Appendix – Other Useful Consumer Tables

Age

Figure 81: Motivation for most recent PC purchase, by age, June 2013

Figure 82: Computer brand intended for purchase, by age, July 2012-March 2013

Gender

Figure 83: Sentiments promoting the traditional laptop, by gender, June 2013

Figure 84: Type of PC used most among multiple PC owners, by gender, June 2013

Figure 85: Type of laptop and desktop intended for purchase, by gender, June 2013

Figure 86: Most likely replacement purchase when current PC breaks, by gender, June 2013

Gender and age

Figure 87: Type of laptop and desktop intended for purchase, by gender and age, June 2013

Figure 88: Most likely replacement purchase when current PC breaks, by gender and age, June 2013

Parental status

Figure 89: Type of laptop and desktop intended for purchase, by parental status, June 2013

Figure 90: Sentiments promoting the traditional laptop, by parental status, June 2013

Household income

Figure 91: Motivation for most recent PC purchase, by household income, June 2013

Figure 92: "Very interested" in new computer features, by household income, June 2013

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: oxygen@mintel.com

Laptops and Desktop Computers - US - August 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Figure 93: Sentiments promoting the traditional laptop, by household income, June 2013

Race/Hispanic origin

Figure 94: Motivation for most recent PC purchase, by race and Hispanic origin, June 2013

Figure 95: "Very interested" in new computer features, by race and Hispanic origin, June 2013

Responses by type of PC owned

Figure 96: Types of PCs owned, by types of PCs owned, June 2013 (part 1)

Figure 97: Types of PCs owned, by types of PCs owned, June 2013 (part 2)

Figure 98: Type of PC used most among multiple PC owners, by types of PCs owned, June 2013

Figure 99: "Very" and "somewhat" interested in new computer features, by age, June 2013

Figure 100: "Very" and "somewhat" interested in new computer features, by household income, June 2013

Figure 101: "Very" and "somewhat" interested in new computer features, by parental status, June 2013

Figure 102: "Very" and "somewhat" interested in new computer features, by age, June 2013

Figure 103: "Very" and "somewhat" interested in new computer features, by household income, June 2013

Figure 104: "Very" and "somewhat" interested in new computer features, by parental status and presence of children in household, June 2013

Appendix – Key Driver Analysis

Interpretation of results

Figure 105: Planning to buy a desktop or laptop computer—key driver output, June 2013

Appendix – Social Media

Brand ownership

Figure 106: Brand ownership, June 2013

Figure 107: Dell ownership, by demographics, June 2013

Figure 108: Lenovo ownership, by demographics, June 2013

Figure 109: HP ownership, by demographics, June 2013

Figure 110: Acer ownership, by demographics, June 2013

Figure 111: Ultrabook ownership, by demographics, June 2013

Figure 112: Chromebook ownership, by demographics, June 2013

Activities done

Figure 113: Activities done, June 2013

Figure 114: Dell – Activities done, by demographics, June 2013

Figure 115: HP – Activities done, by demographics, June 2013

Figure 116: Acer – Activities done, by demographics, June 2013

Online conversation

Figure 117: Online mentions selected PC brands, Tier 1, by week, July 22, 2012-July 21, 2013

Figure 118: Online mentions selected PC brands, Tier 2, by week, July 22, 2012-July 21, 2013

Figure 119: Mentions by page type selected PC brands, by tier, July 22, 2012-July 21, 2013

Figure 120: Mentions by type of conversation, selected PC brands, by tier, July 22, 2012-July 21, 2013

Figure 121: Major areas of discussion surrounding PC brands, by page type, July 22, 2012-July 21, 2013

Appendix – Trade Associations

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: oxygen@mintel.com