

Digital Trends Summer - UK - June 2014

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.



"Tablets are now in half of homes in the UK, despite arriving on the market in their current form just four years ago. Yet people are still just as likely to be in the market for a new laptop, as many remain reluctant to perform complex and work-oriented tasks on a smaller handheld device."

– Paul Davies, Senior Leisure and Technology Analyst

This report looks at the following areas:

As internet usage spreads across myriad devices, it will be more difficult for consumers to justify investing in a top-end PC. As a result, low-cost Chromebooks could defy the overall decline in the wider laptop market in years to come.

This report examines the trends in consumer technology and digital media in the UK, looking at changes in device ownership over the past three months and consumers' purchasing intentions. Next the report looks at changes in online activity and analyses what industry developments are driving these changes.

We also investigate which forms of digital advertising consumers are most likely to notice, click on and buy from and look at consumers' attitudes towards digital advertising.

This edition of Digital Trends features a 'trending topic' that focuses on the internet of things – as we assess consumer interest in new connected devices and services. The report concludes with a look at one of these products – as we analyse people's attitudes towards smartwatches.

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

Digital Trends Summer - UK - June 2014

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

Introduction

Definition

Abbreviations

Executive Summary

Consumer technology products

Ownership of consumer technology products

Figure 1: Household/personal ownership of consumer technology products, December 2013 and April 2014

Planned purchase or upgrade of consumer technology products

Figure 2: Plans for purchase or upgrade of consumer technology products in the next three months, April 2014

Computers and e-readers

Ownership patterns

Figure 3: Household ownership of computers and e-readers, January 2012-April 2014

Mobile phones

Ownership patterns

Figure 4: Personal ownership of mobile phones, January 2012-April 2014

Devices used to access the internet

Consumers connect using myriad devices

Figure 5: Devices used to access the internet, April 2014, and percentage point change between January 2013 and April 2014

Online activities

On any device

Figure 6: Online activities performed in the past three months, April 2014 and percentage point change between December 2013 and April 2014

Digital advertising

Two fifths of consumers click on digital ads

Figure 7: Digital advertising seen and clicked on within the past three months, April 2014

Attitudes towards digital advertising

Managing the balance between monetisation and usability

Figure 8: Attitudes towards digital advertising, April 2014

The internet of things

New 'in-home' devices hold most appeal

Figure 9: Interest in new technology devices and products, April 2014

Attitudes towards smartwatches

Some 44% of potential smartwatch buyers interested in a trial service

Figure 10: Attitudes towards smartwatches, April 2014

What we think

Consumer Technology Products – Overview

Key points

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

Ownership of consumer technology products

Figure 11: Household/personal ownership of consumer technology products, December 2013 and April 2014

Planned purchase or upgrade of consumer technology products

Figure 12: Plans for purchase or upgrade of consumer technology products in the next three months, April 2014

Consumer Technology Products – Televisions

Key points

Ownership

Figure 13: Household ownership of television sets, December 2013 and April 2014

Figure 14: Household ownership of television sets, by television type, January 2012-April 2014

Plans for purchase or upgrade

Figure 15: Plans for purchase or upgrade of television sets in the next three months, April 2014

Demographic breakdown – by gender

Women now just as likely as men to own a smart TV

Figure 16: Household ownership of televisions, by gender, April 2014

FIFA World Cup likely to drive more purchases from men

Figure 17: Plans to purchase any television in the next three months, by gender, April 2014

Demographic breakdown – by age

A third of 25-34s now own a smart TV

Figure 18: Household ownership of televisions, by age, April 2014

Branded stores could help brands to demonstrate smart TVs to older consumers

Figure 19: Plans to purchase any television in the next three months, by age, April 2014

Consumers start to ditch secondary sets

Figure 20: Number of televisions in household, June 2013 and April 2014

Consumer Technology Products – Computers, Tablets and e-readers

Key points

Ownership patterns

Figure 21: Household ownership of computers and e-readers, January 2012-April 2014

Plans for purchase or upgrade

Figure 22: Plans for purchase or upgrade of computers and e-readers in the next three months, April 2014

The number of homes with all three form factors continues to rise

Figure 23: Household ownership of computers, by form factor, April 2014

Demographic breakdown – by gender

Tablets lack of e-ink means e-readers are still popular – particularly with women

Figure 24: Household ownership of computers and e-readers, by gender, April 2014

Men most likely to be considering an upgrade

Figure 25: Plans for purchase or upgrade of computers and e-readers in the next three months, by gender, April 2014

Demographic breakdown – by age

e-readers buck the trend with an older audience

Figure 26: Household ownership of computers and e-readers, by age, April 2014

**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

Digital Trends Summer - UK - June 2014

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.

Younger consumers caught between tablets and laptops

Figure 27: Plans for purchase or upgrade of computers and e-readers in the next three months, by age, April 2014

Consumer Technology Products – Mobile Phones

Key points

Ownership patterns

Figure 28: Personal ownership of mobile phones, January 2012-April 2014

Plans for purchase or upgrade

Figure 29: Plans for purchase or upgrade of mobile phones in the next three months, April 2014

Smartphone owners start to ditch basic secondary handsets

Figure 30: Personal ownership of mobile phones, by phone type, April 2014

Demographic breakdown – by gender

Almost three quarters of men now own a smartphone

Figure 31: Personal ownership of mobile phones, by gender, April 2014

Men slightly more likely to be planning an upgrade

Figure 32: Plans for purchase or upgrade of mobile phones in the next three months, by gender, April 2014

Demographic breakdown – by age

People aged 55-64 now more likely to own a smartphone than a basic handset

Figure 33: Personal ownership of mobile phones, by age, April 2014

Price no longer a barrier for older consumers

Figure 34: Plans for purchase or upgrade of mobile phones in the next three months, by age, April 2014

Internet Access

Key points

Devices used to access the internet

Consumers connect using myriad devices

Figure 35: Devices used to access the internet, April 2014, and percentage point change between January 2013 and April 2014

Repertoire analysis

Figure 36: Repertoire of methods used to access the internet, by age, April 2014

Online Activities

Key points

Online activities performed

On any device

Figure 37: Online activities performed in the past three months, April 2014 and percentage point change between December 2013 and April 2014

On a computer

Figure 38: Online activities performed in the past three months on a computer, April 2014

On a smartphone

Figure 39: Online activities performed in the past three months on a smartphone, April 2014

On a tablet

Figure 40: Online activities performed in the past three months on a tablet, April 2014

**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

Digital Trends Summer - UK - June 2014

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.

Social and sharing activities

Variations by device

Figure 41: Social and sharing online activities performed in the past three months, by device, April 2014

Variations by gender

Figure 42: Social and sharing online activities performed in the past three months, by gender, April 2014

Variations by age

Figure 43: Social and sharing online activities performed in the past three months, by age, April 2014

The quest for information

Variations by device

Figure 44: Information-finding activities performed online in the past three months, by device, April 2014

Variations by gender

Figure 45: Information-finding activities performed online in the past three months, by gender, April 2014

Variations by age

Figure 46: Information-finding activities performed online in the past three months, by age, April 2014

Online shopping

Variations by device

Figure 47: Online shopping activities performed in the past three months, by device, April 2014

Variations by gender

Figure 48: Online shopping activities performed in the past three months, by gender, April 2014

Variations by age

Figure 49: Online shopping activities performed in the past three months, by age, April 2014

Online entertainment

Variations by device

Figure 50: Online entertainment activities performed in the past three months, by device, April 2014

Variations by gender

Figure 51: Online entertainment activities performed in the past three months, by gender, April 2014

Variations by age

Figure 52: Online entertainment activities performed in the past three months, by age, April 2014

Digital Advertising

Key points

Two fifths of consumers click on digital ads

Figure 53: Digital advertising seen and clicked on within the past three months, April 2014

Ads that interrupt activities less likely to engage with consumers

Figure 54: Proportion of people who have clicked on each type of advert after seeing it, December 2013 and April 2014

Targeted communications the most effective

Figure 55: Digital advertising bought from within the past three months, December 2013 and April 2014

People aged 25-34 becoming even more likely to buy from digital ads

Figure 56: Proportion of people who have bought from any type of advert after clicking on ads in the past three months, by gender and age, December 2013 and April 2014

Attitudes towards digital advertising

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

Digital Trends Summer - UK - June 2014

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.

Managing the balance between monetisation and usability

Figure 57: Attitudes towards digital advertising, April 2014

Would consumers accept advertising on paid platforms?

Figure 58: Agreement with statements about digital advertising, by age, April 2014

The Internet of Things

Key points

New 'in-home' devices hold most appeal

Figure 59: Interest in new technology devices and products, April 2014

Men almost twice as likely to want a smartwatch

Figure 60: Interest in new technology devices and products, by gender, April 2014

People aged 16-34 will be the 'guinea pigs' for older generations

Figure 61: Interest in new technology devices and products, by age, April 2014

Attitudes towards smartwatches

Lack of understanding and experience stifles early sales of smartwatches

Figure 62: Attitudes towards smartwatches, April 2014

Trial and review service could trigger conversation

Advanced features could spark interest and drive value

Figure 63: Proportion of consumers interested in buying a smartwatch, by online activities done in the last three months, April 2014

Appendix – Consumer Technology Products

Figure 64: Technology products have in household, April 2014

Figure 65: Technology products have in household, by demographics, April 2014

Figure 66: Technology products have in household, by demographics, April 2014 (continued)

Figure 67: Technology products have in household, by demographics, April 2014 (continued)

Figure 68: Number of televisions in household, April 2014

Figure 69: Number of televisions in household, by demographics, April 2014

Figure 70: Technology products personally owned, April 2014

Figure 71: Technology products personally owned, by demographics, April 2014

Figure 72: Technology products personally owned, by demographics, April 2014 (continued)

Figure 73: Technology products plan to buy/upgrade in the next three months, April 2014

Figure 74: Technology products plan to buy/upgrade in the next three months – Any computer, by demographics, April 2014

Figure 75: Technology products plan to buy/upgrade in the next three months – Smartphone, by demographics, April 2014

Figure 76: Technology products plan to buy/upgrade in the next three months – Any television, by demographics, April 2014

Figure 77: Technology products plan to buy/upgrade in the next three months – Laptop/netbook computer, by demographics, April 2014

Figure 78: Technology products plan to buy/upgrade in the next three months – Tablet computer, by demographics, April 2014

Figure 79: Technology products plan to buy/upgrade in the next three months – Internet-enabled TV, by demographics, April 2014

Figure 80: Technology products plan to buy/upgrade in the next three months – High-definition TV, by demographics, April 2014

Figure 81: Technology products plan to buy/upgrade in the next three months – Static games console, by demographics, April 2014

Figure 82: Technology products plan to buy/upgrade in the next three months – 3DTV, by demographics, April 2014

Figure 83: Technology products plan to buy/upgrade in the next three months – Surround sound/home cinema system, by demographics, April 2014

**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

Digital Trends Summer - UK - June 2014

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.

Figure 84: Technology products plan to buy/upgrade in the next three months – Digital or video camera, by demographics, April 2014

Figure 85: Technology products plan to buy/upgrade in the next three months – Satellite navigation/GPS device, by demographics, April 2014

Figure 86: Technology products plan to buy/upgrade in the next three months – e-reader, by demographics, April 2014

Figure 87: Technology products plan to buy/upgrade in the next three months – Desktop computer, by demographics, April 2014

Figure 88: Technology products plan to buy/upgrade in the next three months – Blu-ray player, by demographics, April 2014

Figure 89: Technology products plan to buy/upgrade in the next three months – Streaming media device/smart set-top box, by demographics, April 2014

Figure 90: Technology products plan to buy/upgrade in the next three months – Portable media player, by demographics, April 2014

Figure 91: Technology products plan to buy/upgrade in the next three months – Portable games console, by demographics, April 2014

Figure 92: Technology products plan to buy/upgrade in the next three months – DVD player, by demographics, April 2014

Figure 93: Technology products plan to buy/upgrade in the next three months – Basic mobile phone, by demographics, April 2014

Appendix – Internet Access

Figure 94: Internet access, by device, April 2014

Figure 95: Internet access, by device, by demographics, April 2014

Figure 96: Internet access, by device, by demographics, April 2014 (continued)

Figure 97: Repertoire of internet access, by device, April 2014

Figure 98: Repertoire of internet access, by device, by demographics, April 2014

Appendix – Online Activities

Figure 99: Online activities done in the last three months, April 2014

Figure 100: Online activities done in the last three months – on any device, by demographics, April 2014

Figure 101: Online activities done in the last three months – on any device, by demographics, April 2014 (continued)

Figure 102: Online activities done in the last three months – on any device, by demographics, April 2014 (continued)

Figure 103: Online activities done in the last three months – on any device, by demographics, April 2014 (continued)

Figure 104: Online activities done in the last three months – on any device, by demographics, April 2014 (continued)

Figure 105: Online activities done on a tablet in the last three months, April 2014

Figure 106: Online activities done on a smartphone in the last three months, April 2014

Appendix – Digital Advertising

Figure 107: Digital advertising seen and clicked on within the past three months, April 2014

Figure 108: Digital advertising seen and clicked on within the past three months – any type of advert, by demographics, April 2014

Figure 109: Digital advertising bought from within the past three months, April 2014

Figure 110: Digital advertising bought from within the past three months – Have bought after clicking on any type of online advert, by demographics, April 2014

Figure 111: Attitudes towards digital advertising, April 2014

Figure 112: Agreement with the statement 'If a website became overcrowded with advertising, I would avoid it', by demographics, April 2014

Figure 113: Agreement with the statement 'It would not be acceptable to see adverts on an online service that I was paying a subscription for', by demographics, April 2014

Figure 114: Agreement with the statement 'I would be interested in using online privacy settings to avoid seeing adverts based on my information', by demographics, April 2014

Figure 115: Agreement with the statement 'It's fair that some free online TV/video services show advertisements', by demographics, April 2014

Figure 116: Agreement with the statement 'I would spend longer on some websites/apps if they did not have advertising on them', by demographics, April 2014

Figure 117: Agreement with the statement 'I would be willing to accept a small amount of advertising on paid-for services in return for a discounted subscription', by demographics, April 2014

Figure 118: Agreement with the statement 'I would be willing to give basic information to brands I like to see more relevant advertising', by demographics, April 2014

**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

Digital Trends Summer - UK - June 2014

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.

Figure 119: Agreement with the statement 'I would be willing to give brands that I like access to my 'real-time' location to receive more relevant offers', by demographics, April 2014
Figure 120: Agreement with the statement 'I would be willing to pay in order to remove advertising from my social networking feed/page', by demographics, April 2014

Appendix – The Internet of Things

Figure 121: Interest in new technology devices and products, April 2014

Figure 122: Interest in new technology devices and products, by demographics, April 2014

Figure 123: Interest in new technology devices and products, by demographics, April 2014 (continued)

Figure 124: Interest in new technology devices and products, by interest in new technology devices and products, April 2014

Figure 125: Interest in new technology devices and products, by interest in new technology devices and products, April 2014 (continued)

Figure 126: Attitudes towards smartwatches, April 2014

Figure 127: Attitudes towards smartwatches, by demographics, April 2014

Figure 128: Attitudes towards smartwatches, by demographics, April 2014 (continued)

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