"In recent years the once-flourishing market for laptops, desktops, and tablets has settled into a pattern of decline. With consumers increasingly using smartphones for communications and entertainment, much of the tech industry’s investment, interest, and innovation has gone to that sector, while consumers are often content to rely on older devices rather than make frequent upgrades."

- Buddy Lo, Senior Technology Analyst

This report looks at the following areas:

- Stagnant PC and tablet market
- Drivers to purchase
- Consumer attitudes toward computers

Computing devices have been a key part of US households for decades – relied upon for work, play, and keeping in touch. However, laptops, desktops, and even tablets are now quite mature products, and they face tough competition from smartphones and other connected devices, such as gaming consoles and set-top boxes. With consumers now primarily focused on replacing existing devices rather than adding new ones, the result has been several years of declining sales. In this Report, Mintel examines industry and consumer trends in this important but struggling sector, and identifies potential avenues for growth.

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.
# Overview

## What you need to know

### Definition

### Overview

**Sales continue to slide**

Figure 1: Total US volume sales and fan chart forecast of PCs and tablets, at current prices, 2013-23

**Little impetus to buy**

Figure 2: Intent to purchase a PC or tablet in the future and type of PC planned to purchase, 2010-18

**Comparatively large installed base**

Figure 3: Technology products owned by household, November 2018

### Executive Summary

**The issues**

**Sales continue to slide**

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**Little impetus to buy**

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**Comparatively large installed base**

Figure 3: Technology products owned by household, November 2018

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**Men look for performance**

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**Tablets on an even steeper slide**

**Smartphones soak up market share**

**Is 5G the future?**

**Continued declines in a static market**

Figure 7: Total US volume sales and fan chart forecast of PCs and tablets, 2013-23

Figure 8: Total US volume sales and forecast of PCs and tablets, 2013-23

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A new reality?
Thinking macro

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Corporate sales help drive PC position
Low-cost and flexible devices an opportunity
Desktops bite the dust
Sound and pictures

Company and Brand Sales of PCs and Tablets

Lenovo, HP, Dell are global PC leaders
Apple, Samsung the tablet winners

What’s Working?

Chromebooks take the low end
Flexibility is key

What’s Struggling?

Desktops get dumped
"Good enough" isn’t enough

What’s Next?

When HD isn’t enough
Speaking of tablets...

The Consumer – What You Need to Know

Many own PCs – but more own smartphones
Dell takes top PC slot, Apple leads for tablets
Purchase intent comparatively low
Performance main reason to buy
Perception problems for desktops

Product Ownership

Laptops found in most homes – but lag behind smartphones
Lower-income consumers choose smartphones
Men still desktop fans, women go mobile

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.
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  - Figure 41: Streaming online activities at home, by device, by gender, November 2018

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Consumer survey data
Abbreviations and terms
Abbreviations

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Correspondence Analysis – Methodology
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