

Digital Trends Quarterly - UK - March 2019

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 foldable phone space is more than just an extension of the smartphone category: it is essentially an entirely new hybrid category that is ripe for a land grab by those who are quickest to market with the best devices. The likes of Samsung won't dominate it by default on the basis of their existing smartphone credentials: if the user experience isn't right, then no amount of heritage is going to convince people to spend four figures on a folding device.”

This report looks at the following areas:

- **Mobile phones and personal technology**
- **Computers**
- **Televisions and other household technology**
- **Recent purchasing and purchase intentions**
- **Online activities**
- **Special focus – Online discussions and interactions**

Despite being a saturated market where people are holding onto their ever-more sophisticated handsets for longer periods of time, the smartphone category remains livelier than most in terms of recent purchasing, and saw a welcome bump over the Christmas period. Moreover, the announcement of foldable phones from Samsung and Huawei in February, with the former's due to market in April, is indisputably the most exciting jump forward in innovation for years. High launch prices mean that only a small minority of adventurous and wealthy enthusiasts will buy into the market this year, but other manufacturers are waiting to jump in and increase competition once they have been able to get a feel for demand.

Meanwhile, we are seeing continued growth in streaming on both smartphones and tablets, which bodes well for the latter, which have been struggling for sales for the last couple of years. Elsewhere, VR is lagging behind other emerging technologies in terms of stimulating mass-market interest and needs to encourage early adopters to spread the word more to help it catch on.

Mintel's special focus on online discussion and interactions this quarter finds that although people are increasingly concerned about the amount of time they are spending online, the overwhelming view of the impact of technology on their lives is positive. Online interactions around shared interests can help spur real-life ones too, with TV food and politics amongst the subjects most likely to get people talking.

**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

Digital Trends Quarterly - UK - March 2019

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

Mobile phones and personal technology

Figure 1: Ownership of mobile phones, January 2012-January 2019

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

Computers

Figure 3: Ownership of computers, January 2012-January 2019

Televisions and other household technology

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

Recent purchasing and purchase intentions

Figure 5: Technology products bought in the last three months, June 2017-January 2019

Figure 6: Technology products plan to buy in the next three months, June 2017-January 2019

Online activities

Figure 7: Online activities done in the last three months on any device*, June 2017-January 2019

Figure 8: Use of new technology in the last three months, April 2017-January 2019

Special focus – Online discussions and interactions

Figure 9: Topics discussed regularly online, January 2019

Figure 10: Attitudes to online interactions, January 2019

Headline Data – Personal Technology Ownership

Data highlights

Mobile phone ownership

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

Mobile phone ownership combinations

Figure 12: Smartphone and basic mobile phone ownership combinations, June 2017-January 2019

Wearable technology ownership

Figure 13: Ownership of wearable devices, November 2014-January 2019

Other personal technology ownership

Figure 14: Ownership of digital/video cameras and portable games consoles, December 2013-January 2019

Headline Data – Household Technology Ownership

Data highlights

Computer ownership

Figure 15: Ownership of computers, January 2012-January 2019

Computer form factors

Figure 16: Ownership of computers, by form factor. June 2017-January 2019

Computer ownership combinations

**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

Digital Trends Quarterly - UK - March 2019

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 17: Computer ownership combinations, June 2017-January 2019

Ownership of TVs

Figure 18: Household ownership of HD and Ultra HD 4K televisions, July 2016-January 2019

TV ownership combinations

Figure 19: TV ownership combinations, June 2017-January 2019

TV connectivity

Figure 20: Household TV connectivity, January 2019

Other household technology ownership

Figure 21: Ownership of other household technology products, January 2012-January 2019

Headline Data – Recent and Planned Technology Purchases

Data highlights

Recent purchasing

Figure 22: Technology products bought in the last three months, June 2017-January 2019

Planned purchasing

Figure 23: Technology products plan to buy in the next three months, June 2017-January 2019

Headline Data – Online Activities

Data highlights

Activities on any device

Figure 24: Online activities done in the last three months on any device*, June 2017-January 2019

Activities on a desktop/laptop

Figure 25: Online activities done in the last three months on a desktop/laptop, June 2017-January 2019

Activities on a tablet

Figure 26: Online activities done in the last three months on a tablet, June 2017-January 2019

Activities on a smartphone

Figure 27: Online activities done in the last three months on a smartphone, June 2017-January 2019

Use of new technology

Figure 28: Use of new technology in the last three months, April 2017-January 2019

Headline Data – Special Focus: Online Discussions and Interactions

Data highlights

Online discussion topics

Figure 29: Topics discussed regularly online, January 2019

Attitudes to online interactions

Figure 30: Attitudes to online interactions, January 2019

Key Trends This Quarter

Christmas bump in smartphone purchasing despite challenging market conditions

Smartwatch trends highlight need to move beyond early adopters

Mature computer market, with lack of need for replacement purchases

Looking to VR for a boost – but it might be a long wait

**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

Digital Trends Quarterly - UK - March 2019

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 rise of voice continues, hand-in-hand with the smart home
 Less than one in five have gone 4K
 Smartphone video streaming continues to grow...
 ...as Younger Millennials and Generation Z move away from TVs
 People don't all see technology as the enemy...
 ...but tech companies must help them help themselves
 TV still gets people talking
 Dinner and politics on the table for discussion

Insight: What Impact Will Foldable Phones Have This Year?

What we've seen
 The future is here
 Huawei draws first blood in the design war
 Figure 31: Samsung Galaxy Fold
 Figure 32: Huawei Mate X
 Form is nothing without function
 Before the gold rush
 Rival brands waiting in the wings
 Xiaomi and Oppo signal their intent
 Apple likely to bide its time
 Will people pay?
 Chinese challengers could mean more competitive pricing
 Early caution inevitable
 Moving beyond the Innovators
 What it means

Insight: What Will It Take to Kick-start VR?

What we've seen
 VR struggling for early growth
 What's holding it back?
 Spreading the word
 Figure 33: Technology product ownership, by VR headset ownership, January 2019
 Game-based VR films can get the conversation started
 Keep it short and social
 Putting it out there
 Figure 34: Netflix VR living room mode
 What it means

Insight: Online Video Growth Can Boost the Tablet Market

What we've seen
 Mobile video streaming growth continues, on tablets as well as smartphones

**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

Digital Trends Quarterly - UK - March 2019

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.

Still ticking the consumption box

Younger consumers less likely to own tablets but more likely to be streaming on them

More investment in content aimed at online audiences

Playing a long-form game

Figure 35: Five Points, on Facebook Watch

Tablet market can turn to streaming to boost sales

What it means

Insight: Using the Digital World to Build Real-life Connections

What we've seen

Social media needs to go back to basics

A platform for expression

Helping people get out of their bubble

Figure 36: Agreement that "I would like technology companies (eg Apple, Google etc) to do more to help me achieve a healthy balance of technology in my life", by generation, January 2019

Filling a local void

AR can help people find their way

Looking for local value

Community centres

What it means

Appendix – Data Sources, Abbreviations and Supporting Information

Data sources

Abbreviations

**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