

Digital Trends Quarterly: Inc Impact of COVID-19 - UK - September 2020

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.



“Despite supply chain issues, the leading brands have continued to release annual upgrades across technology segments. Foldable and dual-screen offerings are bringing innovation to smartphones, laptops and tablets, although take-up remains low.”

– Matt King, Category Director, Technology and Media Research

This report looks at the following areas:

- The impact of COVID-19 on purchasing of consumer technology products
- How online activities have changed as a result of COVID-19
- The increasing role technology is playing in consumers' health and fitness habits
- The latest innovations and new product launches across consumer technology markets.

Recent purchasing of technology products has fallen as a result of COVID-19, with purchasing of smartphones – the category that typically sees the greatest activity – down from 16% of adults in the three months to September 2019 to 12% in April and June 2020.

While there is some sign of purchasing intent rising, it remains below pre-pandemic levels. With the economic uncertainty ahead, consumers will be largely focused on replacements in markets such as smartphones, laptops and tablets. The majority will be focusing on reliable devices that offer good value, with fewer people willing to spend on premium models with the latest features.

There are likely to be delays to take-up of more innovative and expensive designs such as foldable screen technology and hybrid laptops. With many Brits looking to hold onto devices as long as possible, it could also take longer for 5G-ready devices to gain a foothold.

There are more positive signs in home-entertainment markets, however, with the video games market thriving during lockdown in terms of consoles and software. This trend will be heightened by the highly anticipated winter launches from Sony and Microsoft. Meanwhile, the increasing focus on value will provide opportunities for lesser-known brands that can offer competitive specifications at lower prices in many categories.

The pandemic has also brought additional focus on health, with fitness trackers and smartwatches continuing to grow in popularity. Such devices are becoming more sophisticated and are able to offer more comprehensive health and wellbeing data each year. With more people using apps and live classes for home workouts and tracking exercise outdoors, there will be more opportunities than ever in the health tech market.

**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: Inc Impact of COVID-19 - UK - September 2020

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

Key issues covered in this report
 COVID-19: Market context
 Economic and other assumptions
 Covered in this Report

Executive Summary

COVID-19 lockdown sees purchasing fall across the board
 Figure 1: Technology products bought in the last three months, September 2018-June 2020

Smartphone ownership reaches a new peak
 Figure 2: Ownership of mobile phones, July 2012-June 2020

Emphasis on health and fitness drives sports watch ownership
 Figure 3: Ownership of wearable devices, June 2015-June 2020

Digital activities grow across devices during lockdown
 Figure 4: Online activities done in the last three months on any device*, June 2018-June 2020

Use of voice commands surges in lockdown
 Figure 5: Other digital activity in the last three months, September 2019 to June 2020

Recent tech purchases focused on personal use
 Figure 6: Purchasing habits during COVID-19, June 2020

Over half of Brits used technology to connect to the community
 Figure 7: Use of technology in COVID-19, June 2020

Headline Data – Technology Ownership and Purchasing

Recent purchasing
 Key points
 Figure 8: Technology products bought in the last three months, September 2018-June 2020

Planned purchasing
 Key points
 Figure 9: Technology products plan to buy in the next three months, September 2018-June 2020

Mobile phone ownership
 Key points
 Figure 10: Ownership of mobile phones, July 2012-June 2020

Wearable technology ownership
 Key points
 Figure 11: Ownership of wearable devices, June 2015-June 2020

Other personal technology ownership
 Key points
 Figure 12: Ownership of digital/video cameras and portable games consoles, November 2014-June 2020

Computer ownership

**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: Inc Impact of COVID-19 - UK - September 2020

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.

Key points

Figure 13: Ownership of computers, September 2012-June 2020

Computer form factors

Key points

Figure 14: Types of laptop and desktop owned. December 2017-June 2020

TV ownership

Key points

Figure 15: Household ownership of HD and Ultra HD 4K televisions, September 2016-June 2020

TV connectivity

Key points

Figure 16: Household TV connectivity, June 2019-June 2020

Other household technology ownership

Key points

Figure 17: Ownership of other household technology products, September 2012-June 2020

Headline Data – Online Activities

Digital activities on computers, tablets and smartphones

Key points

Figure 18: Online activities done in the last three months on any device*, June 2018-June 2020

Figure 19: Online activities done in the last three months on a desktop/laptop, June 2018-June 2020

Figure 20: Online activities done in the last three months on a tablet, June 2018-June 2020

Figure 21: Online activities done in the last three months on a smartphone, June 2018-June 2020

Other digital activity

Key points

Figure 22: Other digital activity in the last three months, September 2019 to June 2020

Headline Data – Special Focus: COVID 19

Technology purchasing during COVID-19

Key points

Figure 23: Purchasing habits during COVID-19, June 2020

COVID-19 technology habits

Key points

Figure 24: Use of technology in COVID-19, June 2020

Key Consumer Trends and Product Launches

COVID-19 disruption hits global technology markets

Smartphone ownership hits new peak during lockdown

Samsung falls behind Huawei globally in the smartphone market

Figure 25: Samsung Galaxy Note 20 Ultra

Economic pressures could delay consumers' desire for 5G upgrades

Huawei looks to increase its presence across technology markets

**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: Inc Impact of COVID-19 - UK - September 2020

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.

Smart speaker growth driving the use of voice commands

Figure 26: Huawei Sound X

Samsung continues to push foldable smartphones

Figure 27: Samsung Galaxy Z Fold 2

Tablets could embrace foldable and dual-screen technology

Figure 28: Lenovo ThinkPad X1 Fold

Figure 29: Microsoft Surface Neo

Focus remains on standard laptops despite innovative new designs

Apple's focus on iPad Pro reflected by launch of Magic Keyboard

Figure 30: Apple's Magic Keyboard for iPad Pro

Apple focuses on improved performance in wider iPad range

Growing emphasis on health data has boosted fitness tracker ownership

Fitbit adds the Sense smartwatch to its 2020 range ...

Figure 31: Fitbit Sense

... while Google's acquisition faces scrutiny from regulators

Leading brands continue to update smartwatch ranges in 2020

Figure 32: Samsung Galaxy Watch 3

Gaming sector sees growth as people seek lockdown entertainment

Figure 33: Nintendo Switch Lite coral edition

Leading console brands all report increasing sales

Animal Crossing captures imagination with early lockdown release

Twitch sees surge in usage as interest in esports grows in lockdown

Further boost coming to sector with winter console releases ...

Figure 34: PlayStation 5

... although some major software titles could be delayed

VR usage declines but standalone headsets offer grounds for optimism

Insight: COVID-19's Impact on Technology Purchasing

What we've seen

There remains a reduced demand for technology purchases

Figure 35: Technology and communications spending intentions for the next month compared to usual, 23 April-11 September 2020

COVID-19 supply chain issues have limited technology purchases

Figure 36: Impact of stock shortages, by selected demographics, June 2020

Smartphone ownership reaches a new high

Figure 37: Smartphone ownership, by selected demographics, September 2019 and June 2020

Recent technology purchases are twice as likely for personal use

Figure 38: COVID 19 technology habits, June 2020

Better signs ahead as planned purchasing outstrips recent buying ...

Figure 39: Recent purchases versus planning purchases, June 2020

... although purchasing will remain lower than pre-outbreak levels

**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: Inc Impact of COVID-19 - UK - September 2020

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 40: Planned purchasing, September 2019-June 2020

Brands must utilise trade-in deals to drive sales throughout recession

Stores reopening provides a boost but strong online sales service remains vital

What it means

Insight: Changing Online Habits in COVID-19

What we've seen

Brits spending more time online than ever due to COVID-19 lockdown

Figure 41: UK time online, 2018-2020

Video calling apps surge as people seek to remain in contact

Younger Brits are utilising tech to connect to the local community

Figure 42: Staying connected with the community, by selected demographics, June 2020

Instant messaging has been near universal among 16-44 year olds in lockdown

Figure 43: Instant messaging usage, by selected demographics, June 2020

Nearly all young Brits accessed social networks during lockdown

Figure 44: Social media network usage, by selected demographics, June 2020

Voice technology use boosted by lockdown

Brits turn to video streaming services for lockdown entertainment

What it means

Insight: Technology's Growing Role in Health and Fitness

What we've seen

Technology is playing an increasing role in health and wellbeing

Women are driving expansion in the fitness tracker market ...

... while there has been strong growth among older demographics

Figure 45: Fitness band/sports watch ownership, by selected demographics, September 2019-June 2020

Reopening of gyms will not mean an instant return for many Brits

41% of Brits take part in organised online activities more than before COVID-19

Figure 46: Participation in online activities, by selected demographics, June 2020

Ring Fit Adventure brings exercise to the Nintendo Switch

Figure 47: RingFit Adventure for Nintendo Switch

Exercise titles bringing new possibilities to virtual reality

Figure 48: FitXR

Mindfulness app downloads grow as people focus on mental health

Half of Brits are happy to download the track and trace app

Figure 49: COVID-19 tracing app downloads, by selected demographics, June 2020

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