



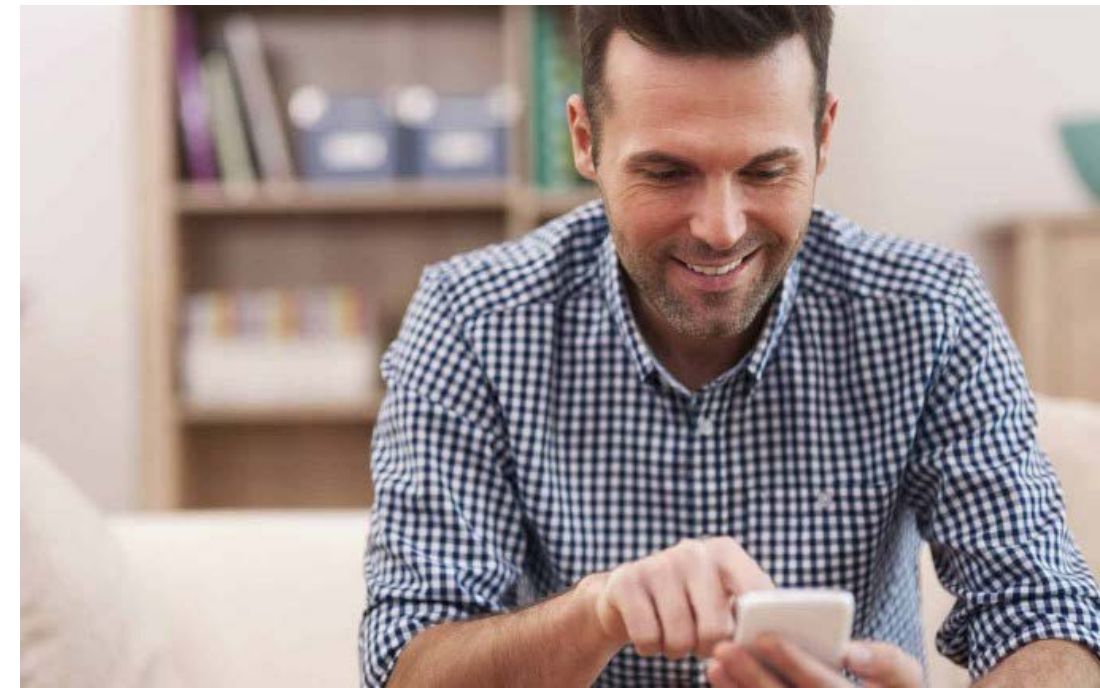
2015 Consumer Device Usage Highlights

Bob O'Donnell, President and Chief Analyst



Agenda

- Survey Methodology
- Device Ownership
- Activities
- Conclusions



Survey Methodology

- Online survey of 3,012 consumers (ages 18-75+) regarding their activities and the usage of personally-owned PCs, tablets, smartphones, TVs and wearables
 - Fielded in September and October, 2015
- Respondents were required to own and regularly use at least one PC, tablet or smartphone
- Respondents include:
 - 50.9% Females, 49.1% Males

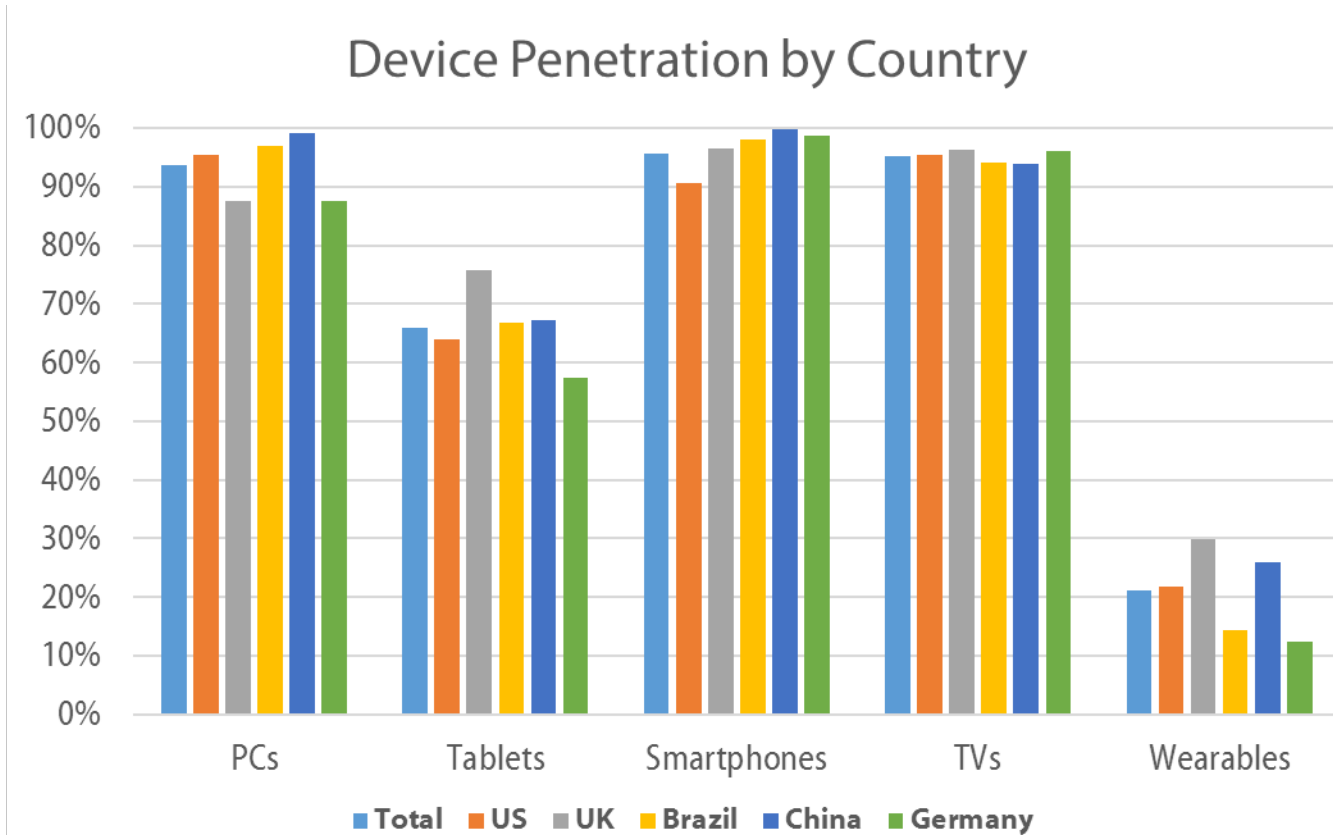
Respondents by Country and Age Group

RESPONDENTS	18-24	25-34	35-44	45-54	55-65	65-74	75+	TOTAL	% of Total
US	75	321	175	221	126	78	28	1,024	34%
UK	42	156	83	117	64	29	6	497	16.5%
Brazil	51	164	126	73	66	16	0	496	16.5%
China	17	184	128	78	74	14	4	499	16.6%
Germany	50	146	93	107	78	21	1	496	16.5%
TOTAL	235	971	605	596	408	158	39	3,012	100%
% of Total	7.8%	32.2%	20.1%	19.8%	13.5%	5.2%	1.3%	100%	

- 40% of respondents are 18-34, 40% are 35-54 and 20% are 55+

Device Penetration

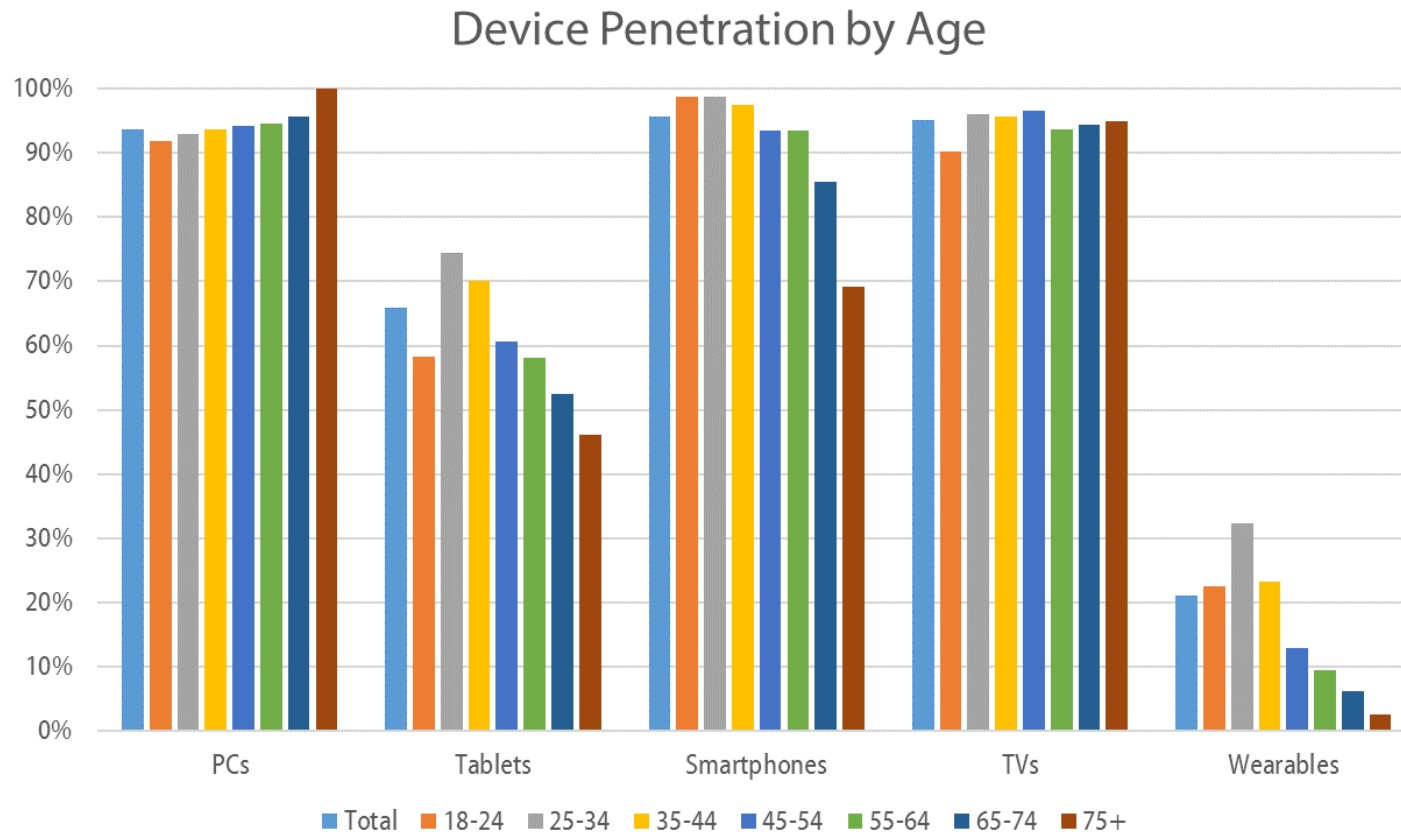
Do you own and regularly use (at least once a week) either a personal computer, a tablet, TV, a smartphone, or a wearable device (such as a smart watch)?



- Smartphone penetration now barely tops TV and PC penetration overall and in most countries
- US smartphone penetration the lowest of all countries surveyed
- Tablets are owned by about 2/3 of respondents

Device Penetration

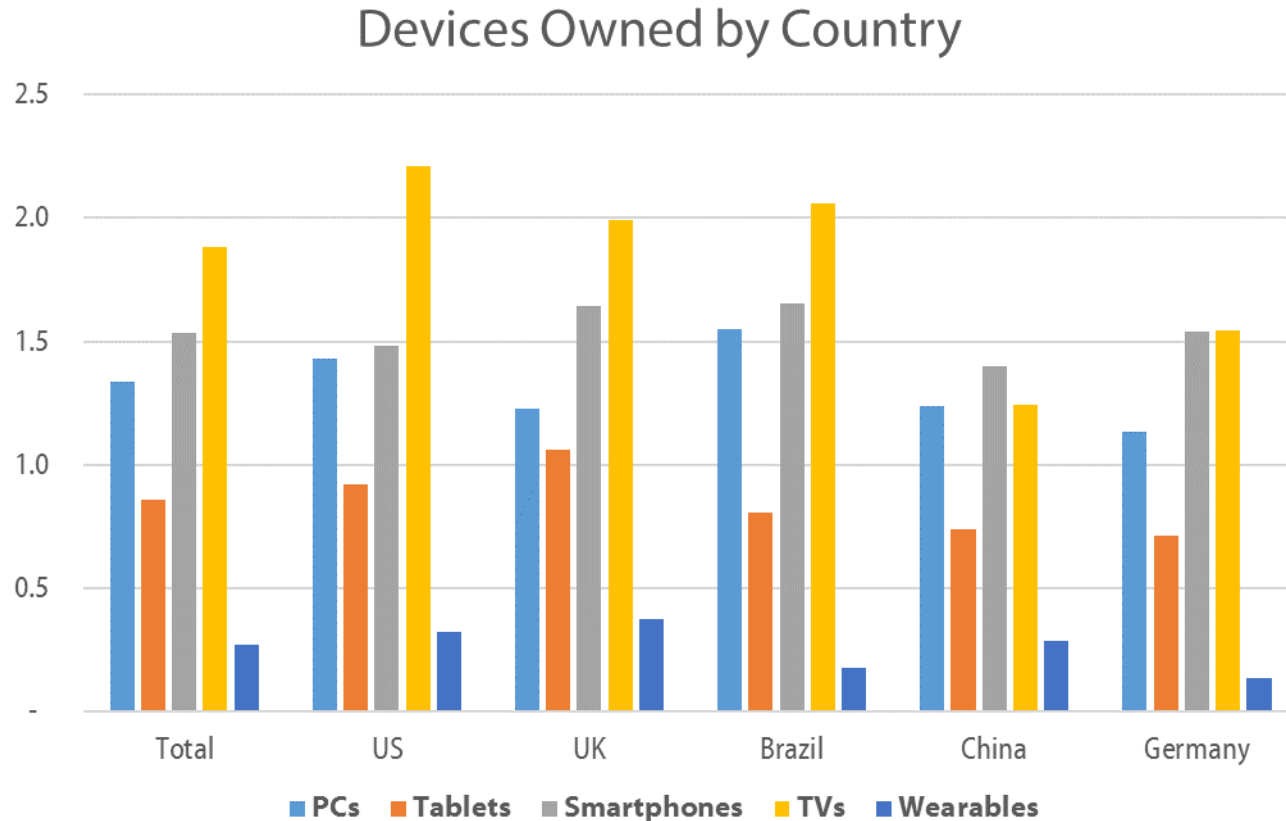
Do you own and regularly use (at least once a week) either a personal computer, a tablet, TV, a smartphone, or a wearable device (such as a smart watch)?



- PC penetration is highest in older ages, while smartphone penetration highest in younger ages
- Tablet and wearable penetration peaks in the 25-34 range and then declines
- TV penetration is consistent across age groups

Device Ownership

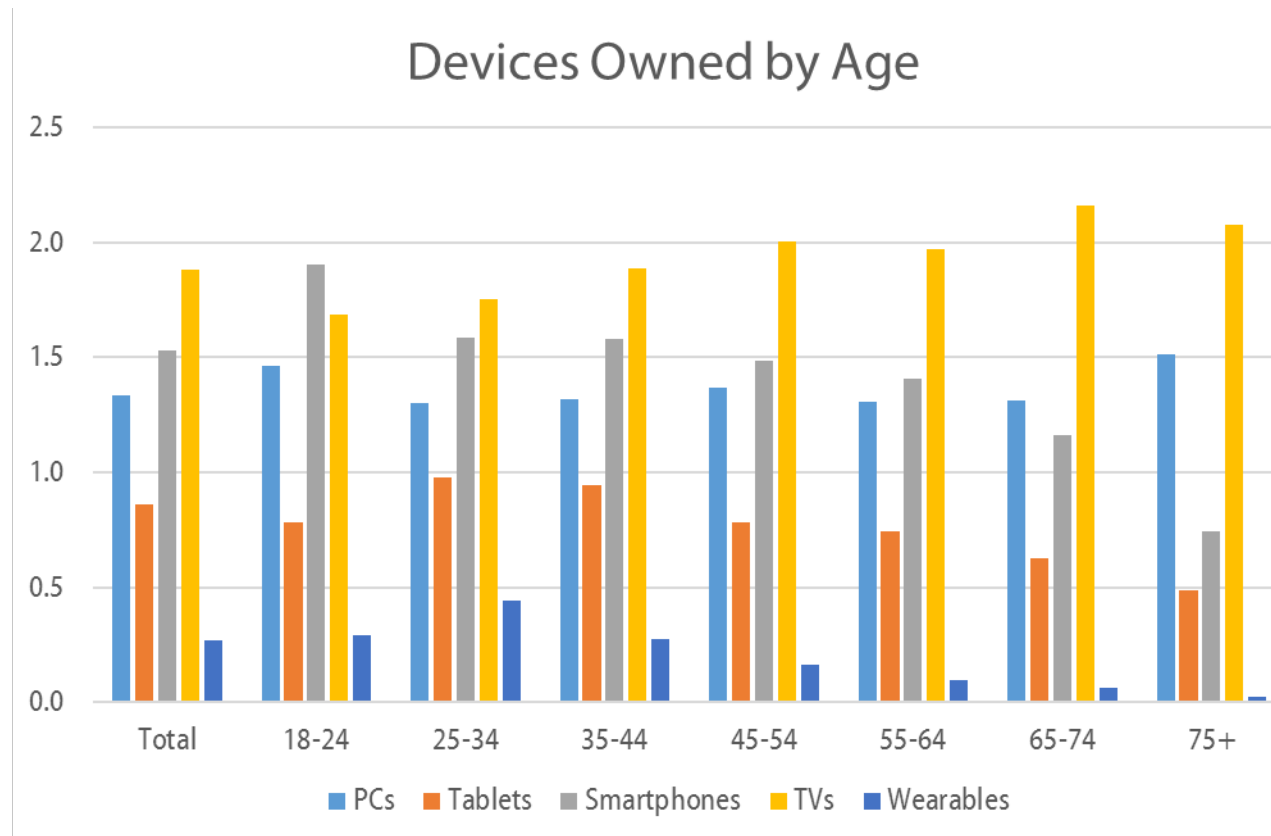
How many of each of the following devices are actively used in your household?



- In every country but China, more TVs are owned per household than any other device
- In China, smartphones are number one and number two everywhere else

Device Ownership

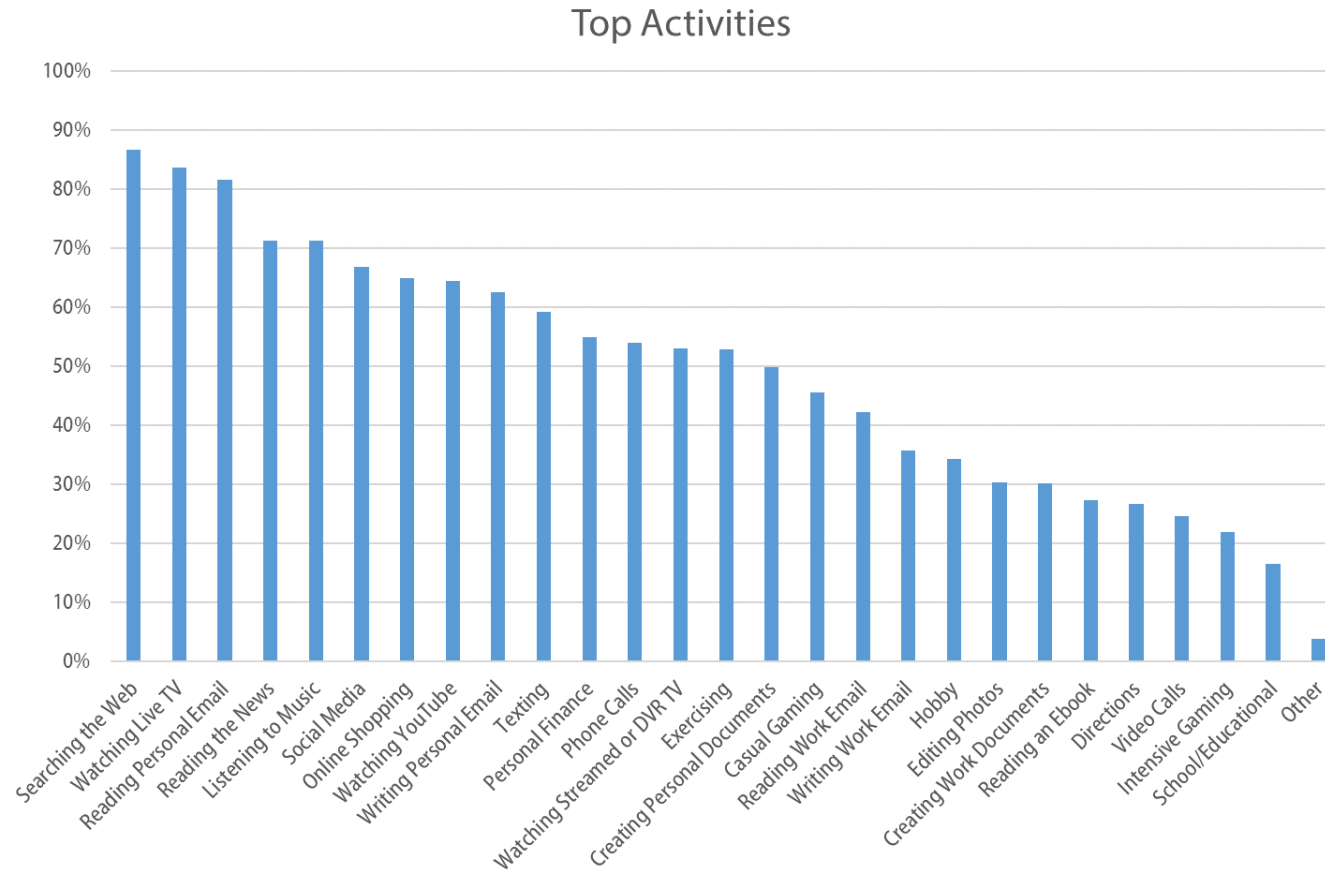
How many of each of the following devices are actively used in your household?



- Looking at the same data by age, the number of TVs is highest in all age groups but 18-24s, where smartphones average nearly 2 per household
- The number of PCs per household is relatively consistent across all age groups at just under 1.5

Activity Participation

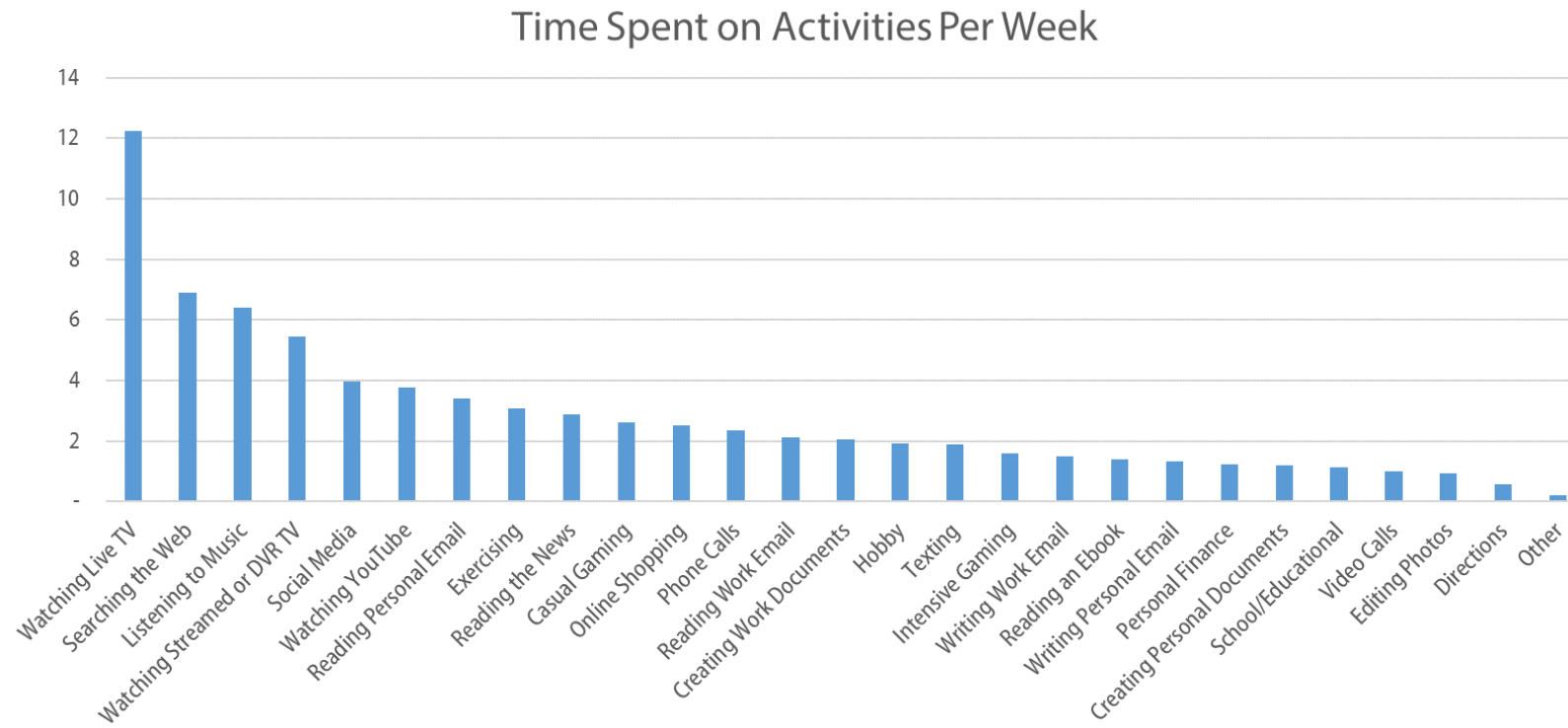
How much time do you spend on each of these activities on devices that you own?



- The top five activities that people participate in on their personally owned devices are:
 - Browsing the web
 - Watching live TV programming
 - Reading personal email
 - Reading the news
 - Listening to music

Activity Times

How much time do you spend on each of these activities on devices that you own?



- In terms of total time spent, watching live TV is nearly double that of searching the web—the second most popular activity—at over 12 hours versus just under 7
- Listening to music, watching streamed/recorded TV and engaging in social media rounded out the top 5 activities based on time spent

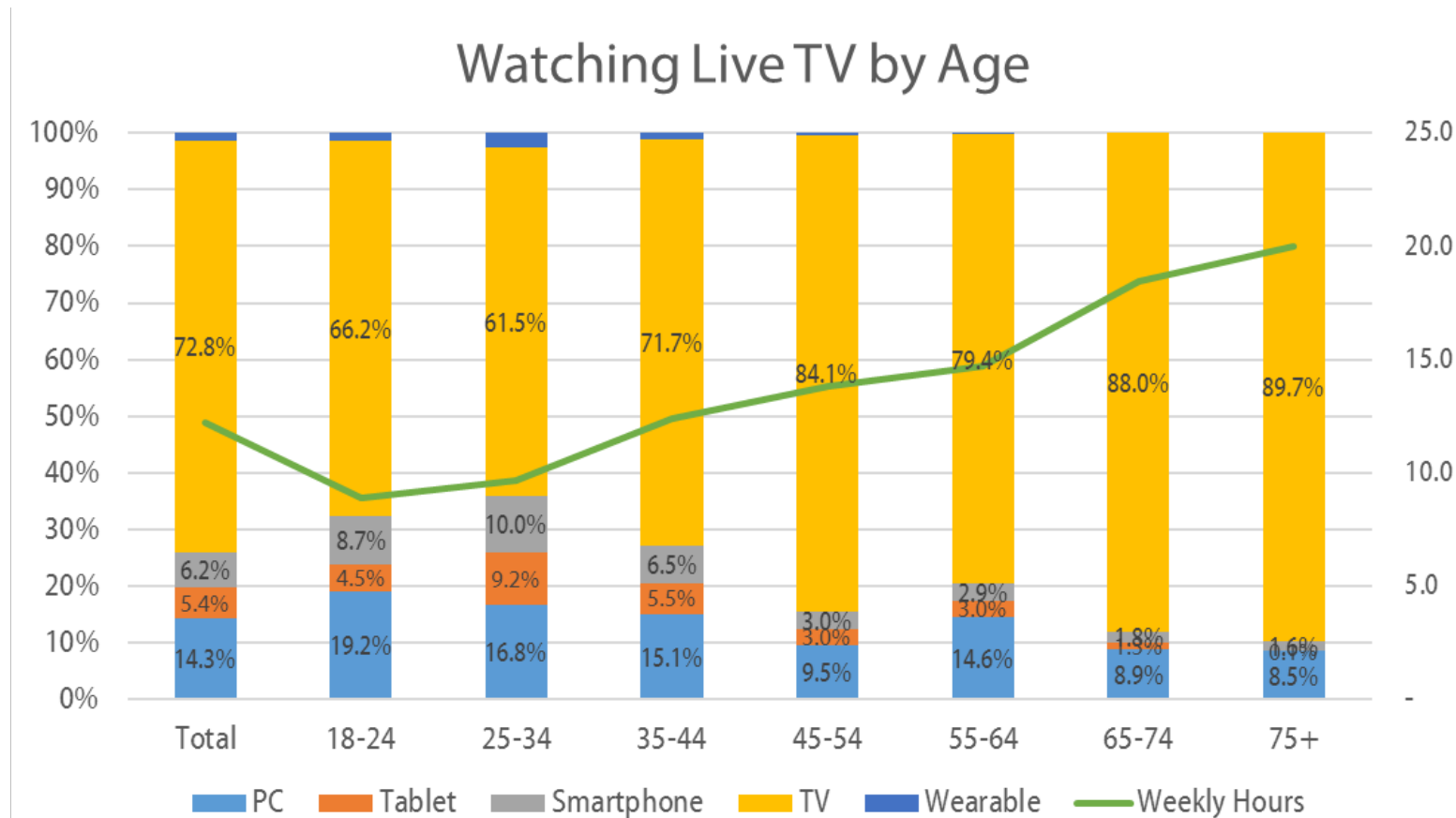


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N=3,012

Watching live TV Shows, Movies or sporting events

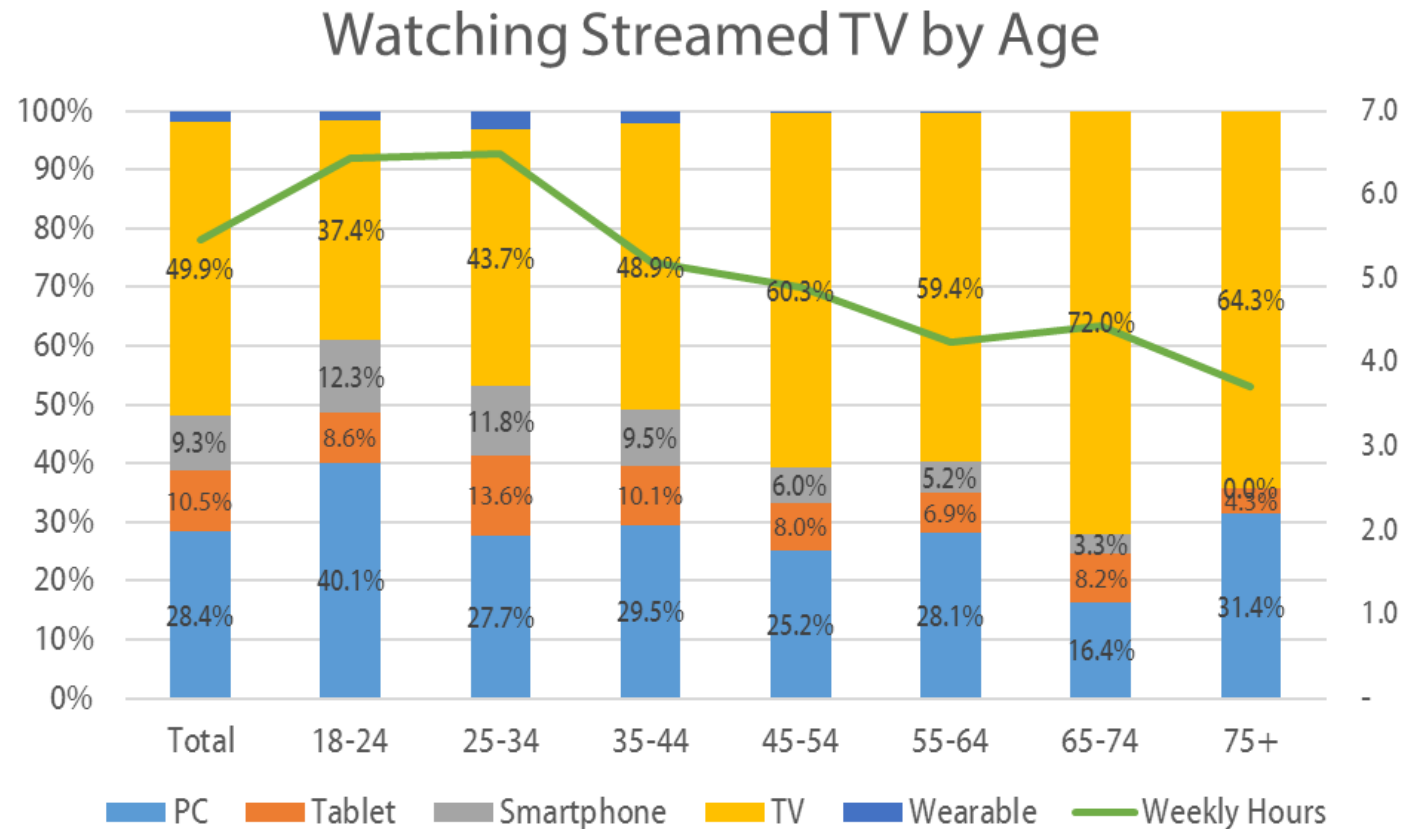
How much time do you spend on each of these activities on devices that you own?



- This chart looks at both how much time in hours is spent across a given activity by age group (shown by the green line and notated on the right side of the chart), as well as how that time is split across devices by age group
- Most live TV watching is done on a TV, but for younger age groups, about 1/3 is done on other devices, with PCs being the most popular alternative choice

Watching streamed/recorded TV Shows, Movies or sporting events

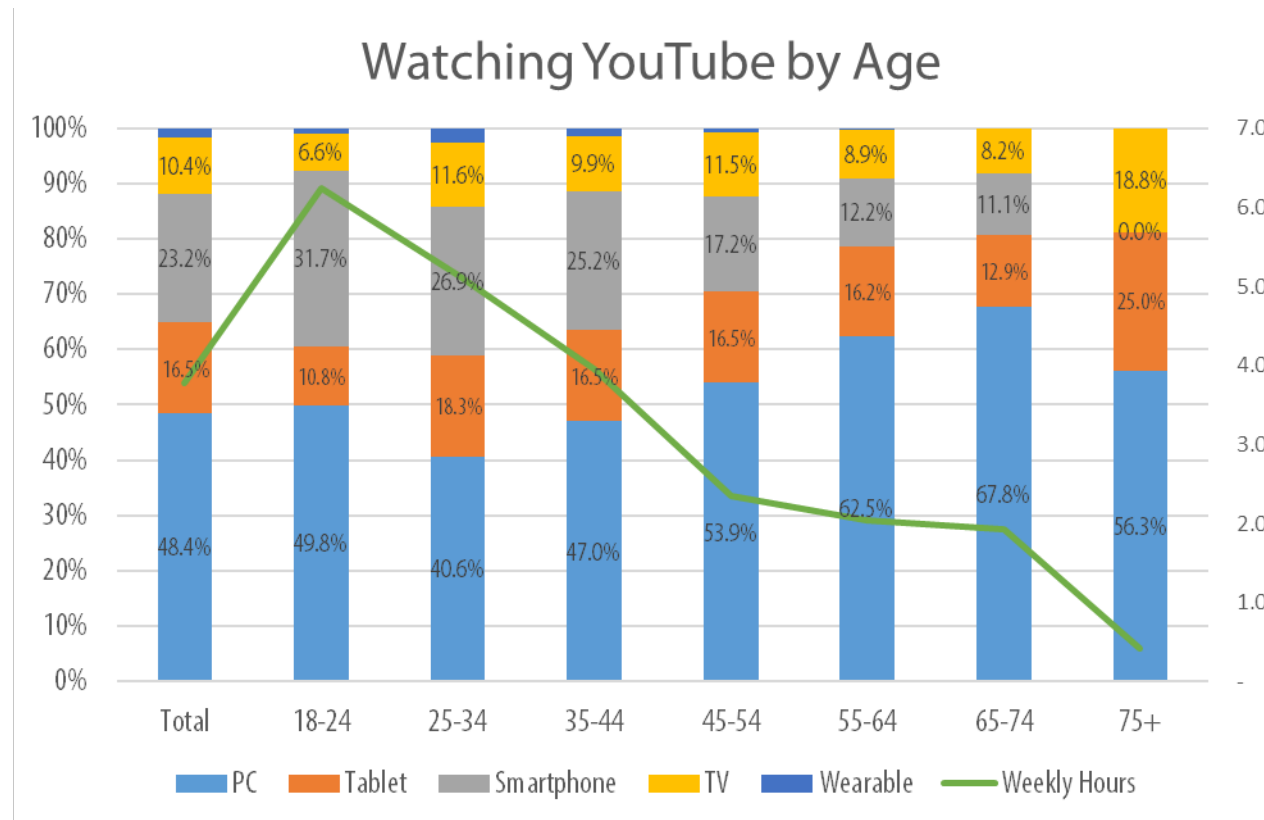
How much time do you spend on each of these activities on devices that you own?



- On average, about half of streamed or recorded TV programs are watched on the TV, with the other half split across multiple devices
- The most popular alternative device for streamed video, even among the youngest users, is the PC, with smartphones only representing about 12% of total time among the two youngest groups

Watching YouTube-style videos

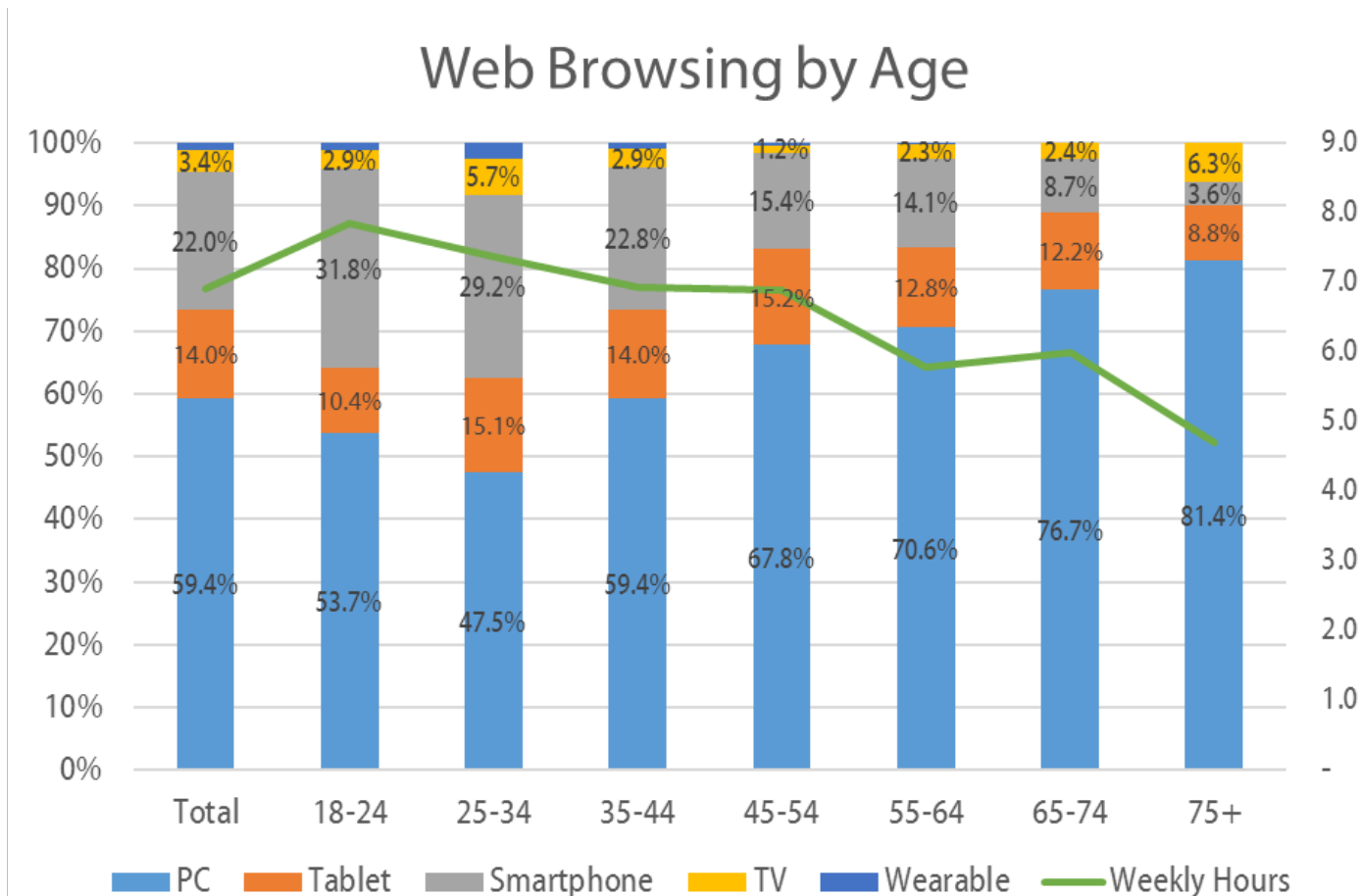
How much time do you spend on each of these activities on devices that you own?



- When moving to YouTube-style videos, there's a dramatic reduction in TV usage and increase in both PCs and smartphones
- As expected, younger consumers spend significantly more time watching these types of videos than older ones
- Tablet usage is significantly lower in the 18-24 age group, likely an impact of more large-screen phone adoption in this group

Searching the web

How much time do you spend on each of these activities on devices that you own?

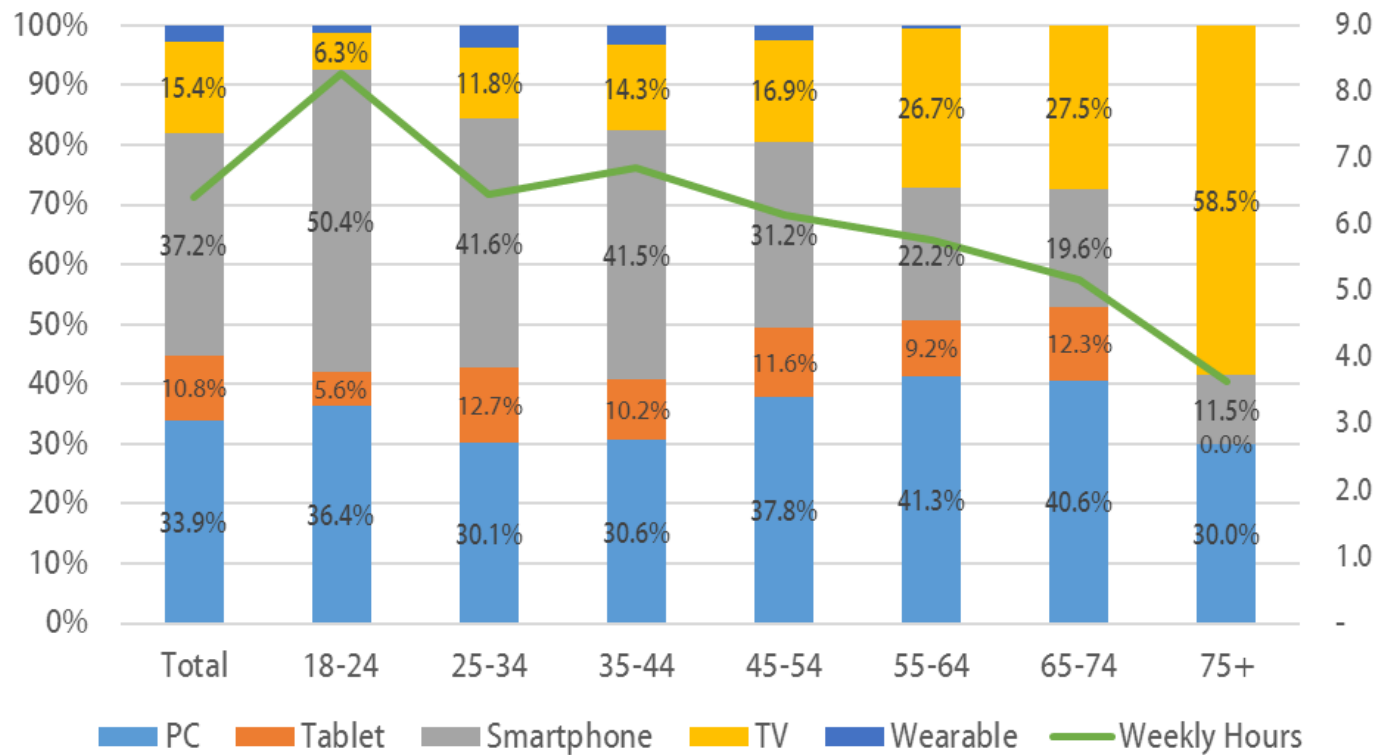


- In the case of web browsing, the total amount of time spent per week decreases by age, while the percentage of time spent on a PC increases with age
- In all but the 25-34 age group, over 50% of browsing still occurs on a PC
- The youngest group (18-24) actually spent more time browsing on a PC than the next oldest group (25-34), suggesting reasonably strong interest in PCs by younger consumers

Listening to Music

How much time do you spend on each of these activities on devices that you own?

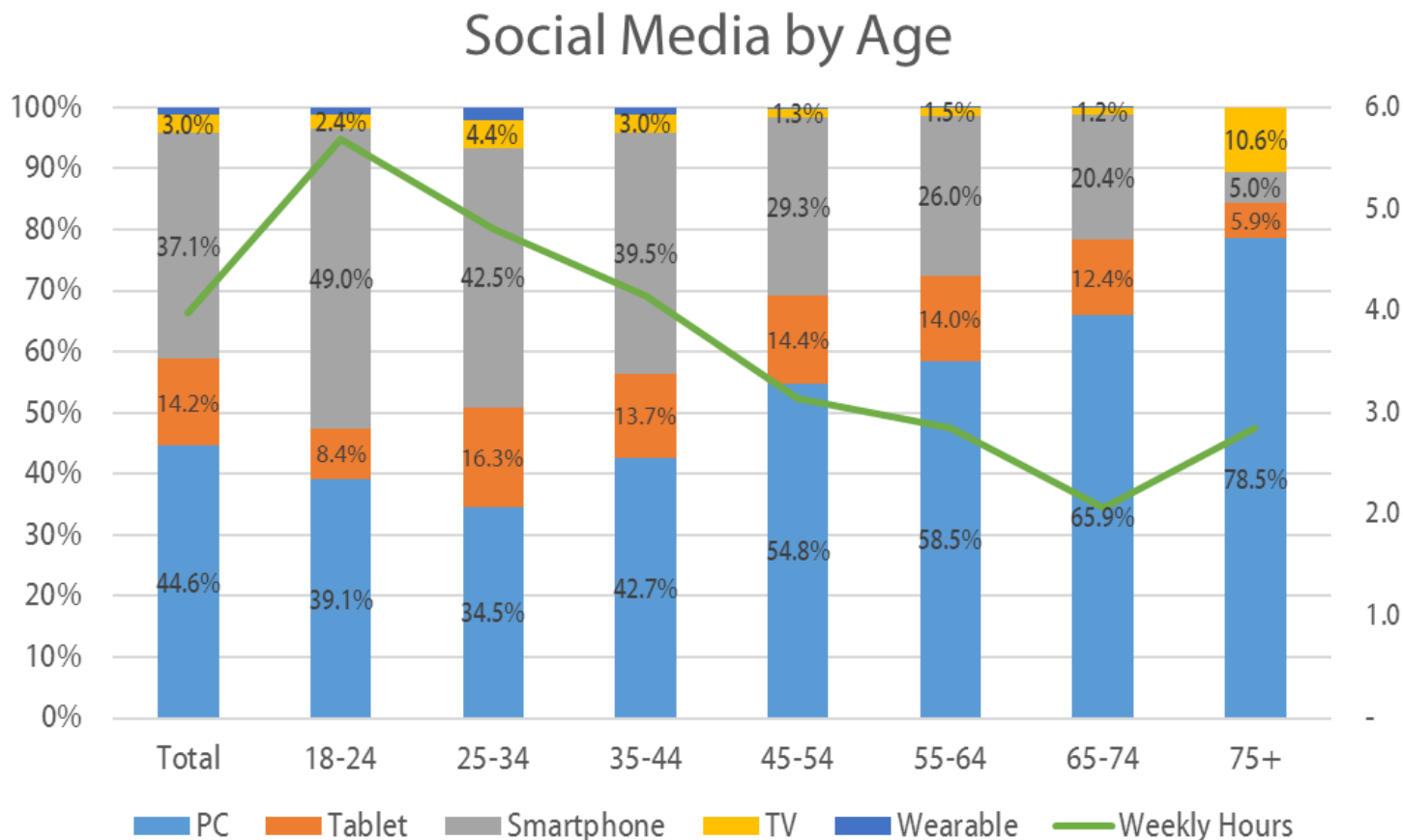
Listening to Music by Age



- For music listening, time spent decreases with age
- As expected, most younger consumers do most of their listening via smartphones, but all groups spend a healthy amount of time listening via PCs (likely while doing other activities there as well)
- The older groups skew towards TV, which includes stereo components attached to their TVs

Reading/updating social media

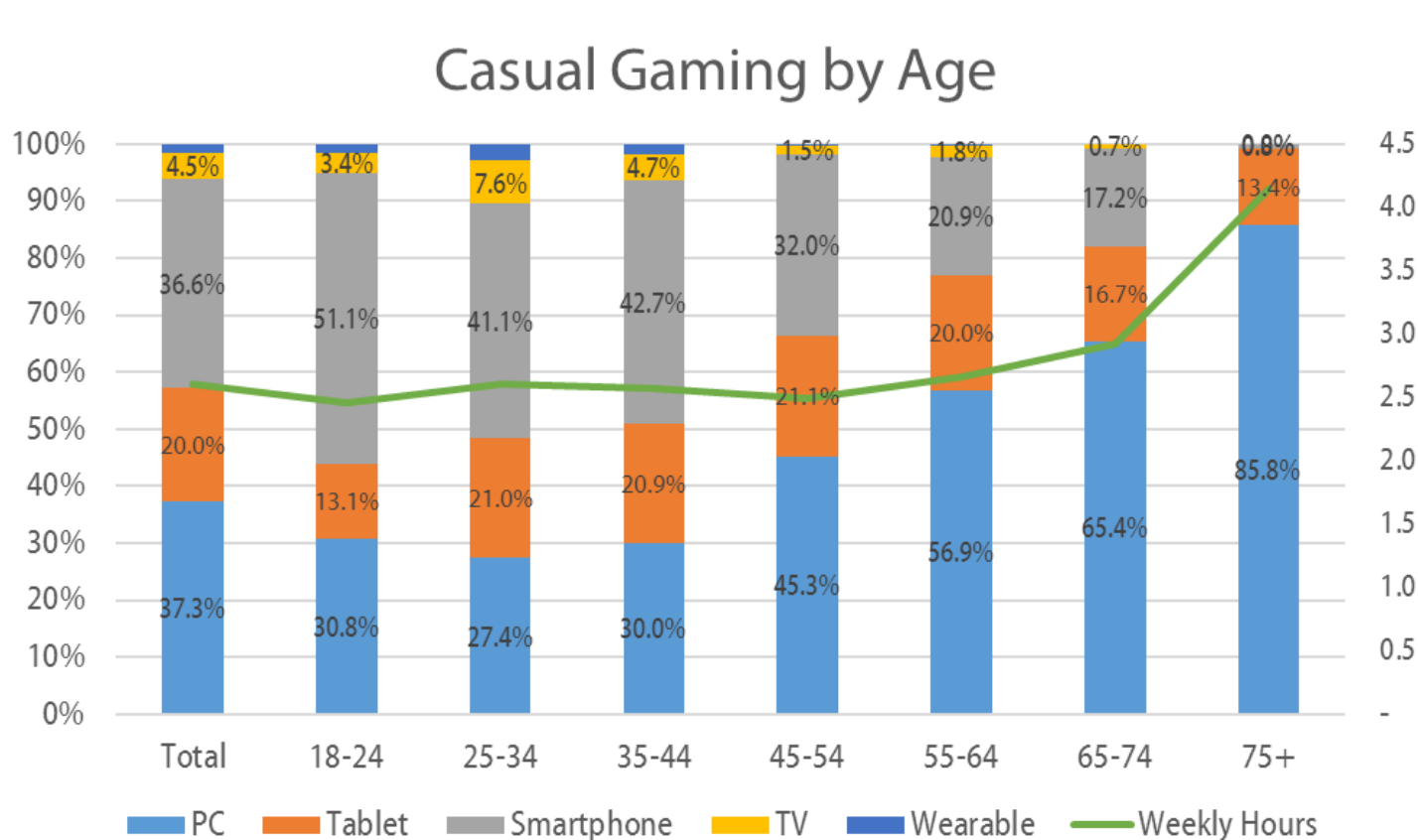
How much time do you spend on each of these activities on devices that you own?



- Similar to several other activities, social media usage declines with age
- Smartphones are the primary social media device for the two youngest age groups, but even by the 35-44 age group, more people use their PC than their smartphone
- As with web browsing, tablet usage for social media is consistently in the low teens across most age groups

Casual Gaming (e.g., puzzle games, card games, etc.)

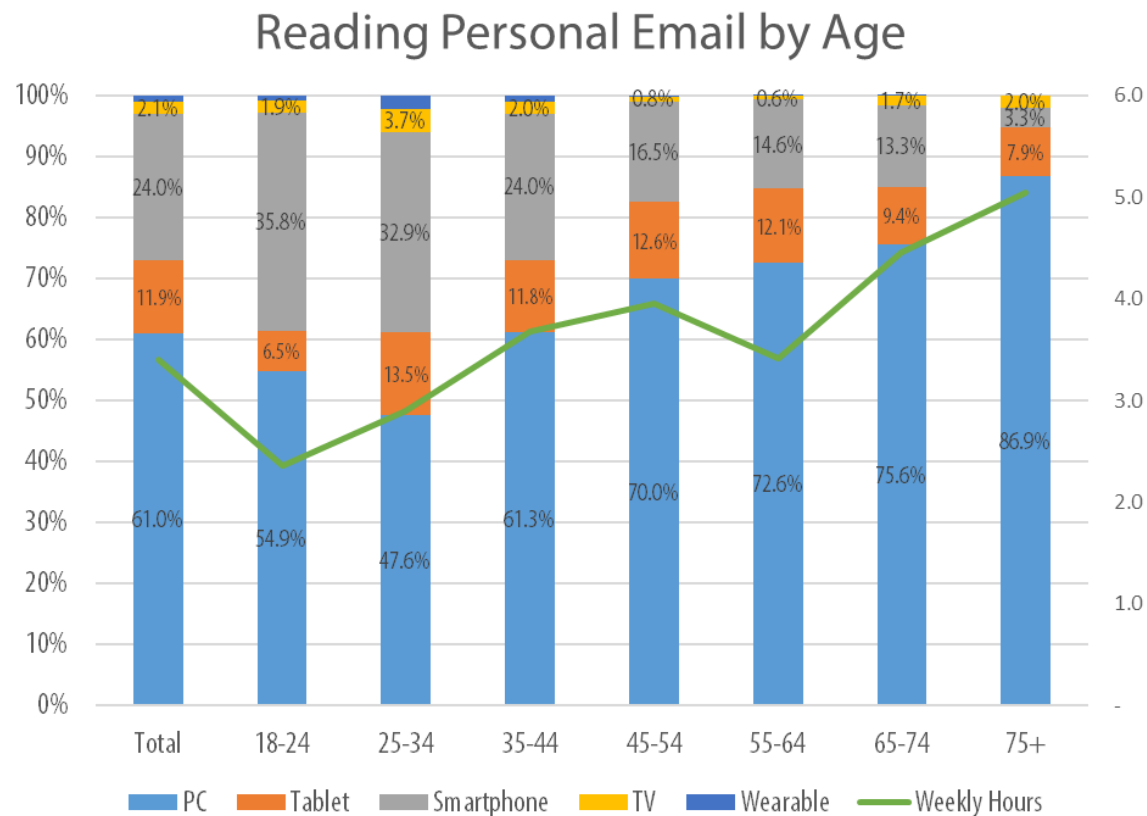
How much time do you spend on each of these activities on devices that you own?



- Time spent on casual games actually increases with age
- There's also a dramatic shift across device types as consumers get older
- More than half of the time 18-24 year olds play casual games, they do so on their smartphones, while for 55+, more than half of their casual gaming time is done on a PC

Reading Personal Email

How much time do you spend on each of these activities on devices that you own?

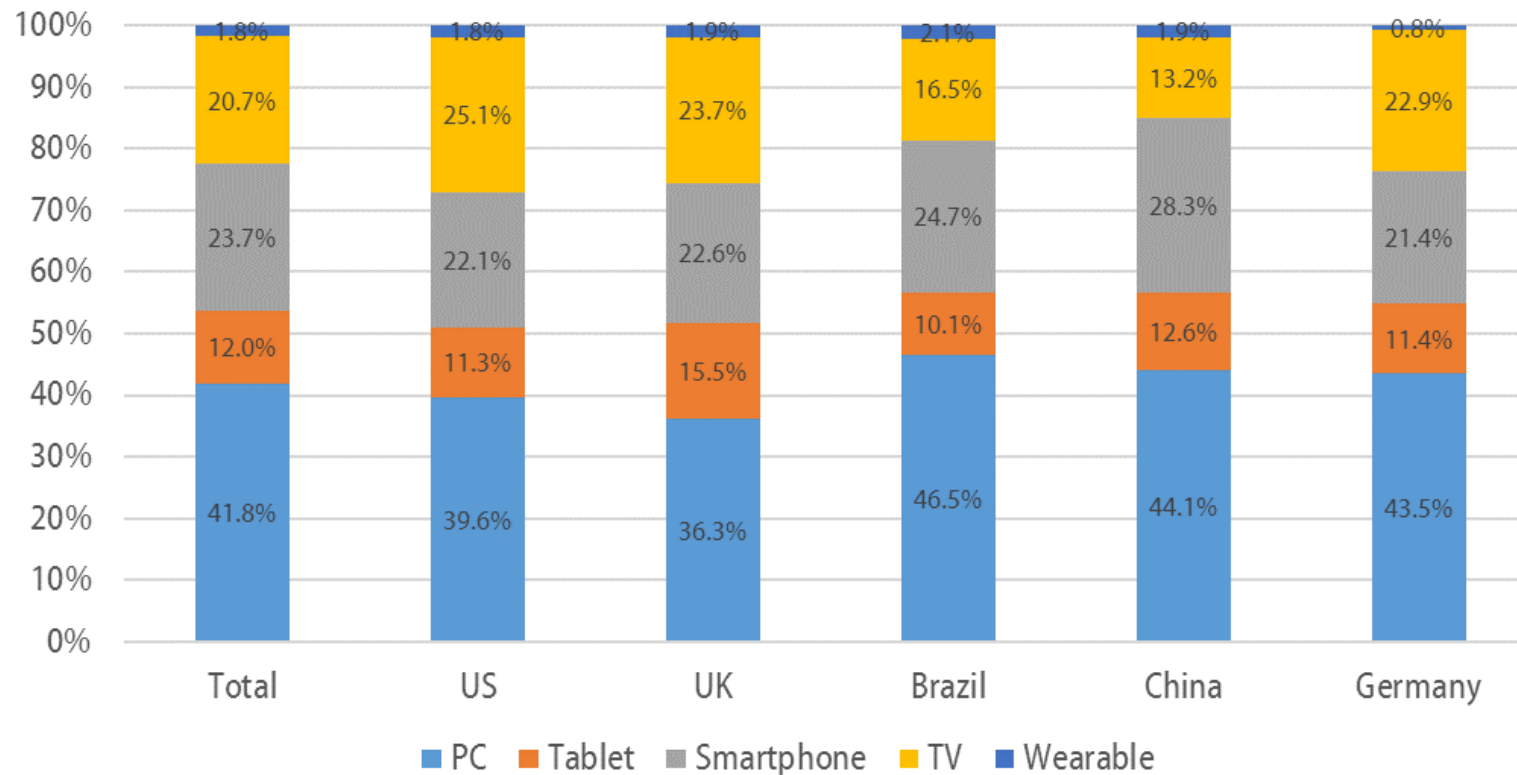


- PCs are the top device for reading personal email and take well over 50% share in all age groups but 25-34
- Time spent on email increases with age and the percentage of that time spent on a smartphone decreases

Total Device Usage

How much time do you spend on each of these activities on devices that you own?

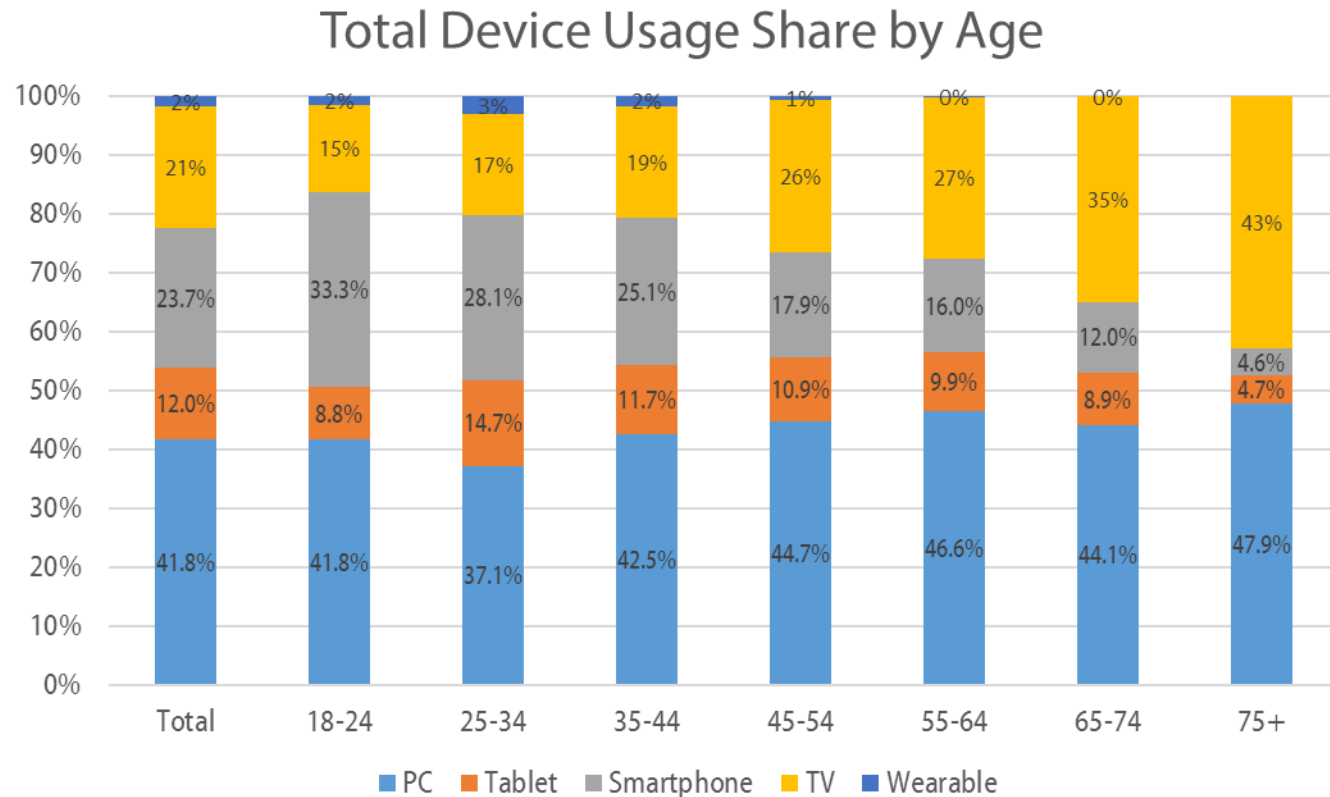
Total Device Usage Share by Country



- Combining data across all the different activities shows that people in every country surveyed spend more on their PCs doing these activities than any other devices
- In China and Brazil, smartphones had the second most usage, but in the US, UK and Germany, TVs had the second most usage

Total Device Usage

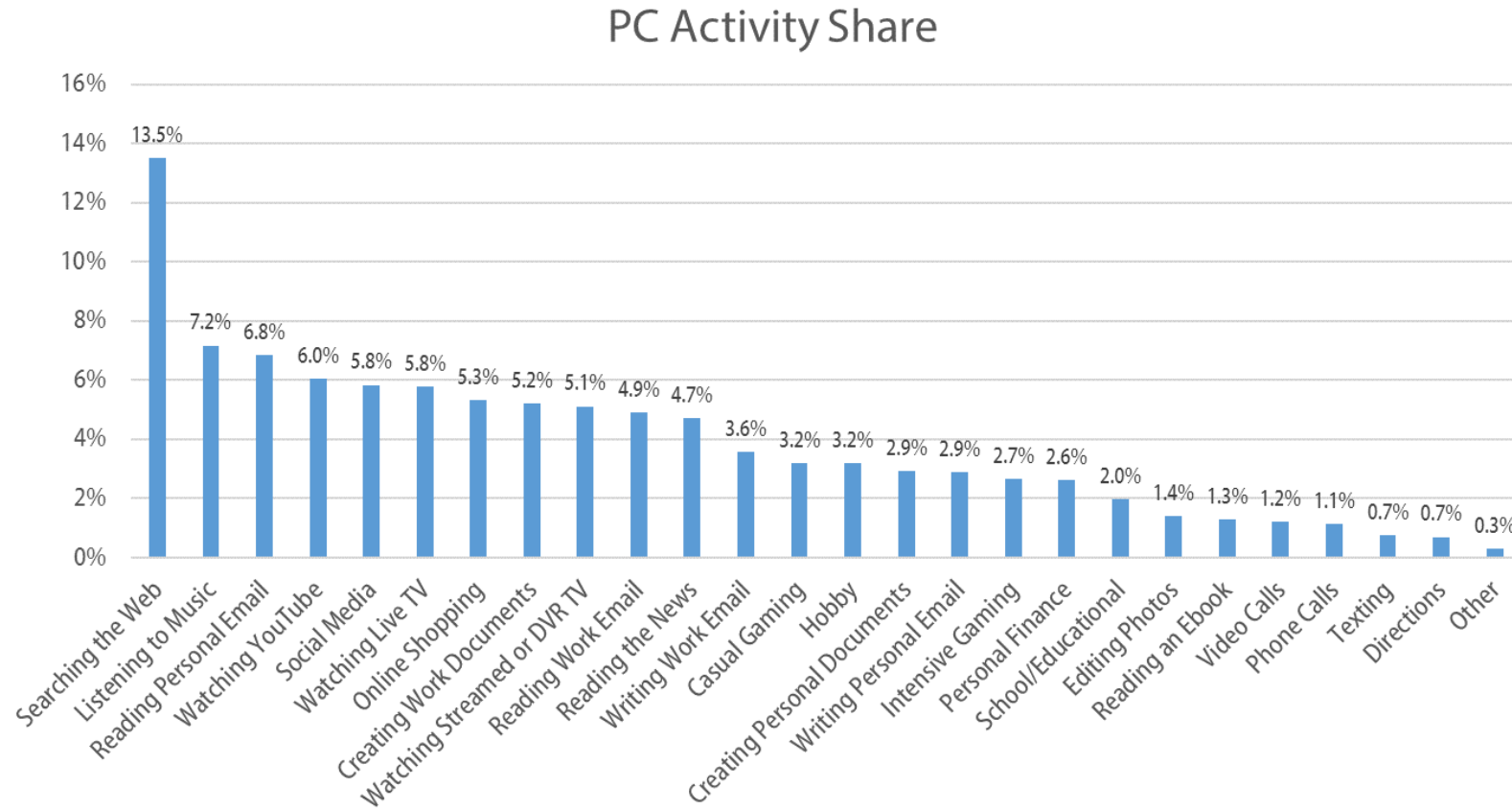
How much time do you spend on each of these activities on devices that you own?



- Looking at the same data by age group shows that the PC is the consistent top choice across all age groups
- As expected, smartphone usage is higher with younger groups and lower with older ones, while TV usage follows the exact opposite trend
- Tablet usage averages 12% of total time, but for most age groups it's under 10%

PC Activity Usage

How much time do you spend on each of these activities on devices that you own?



- PCs are used on average 30.4 hours per week for these activities with the top five (based on total time used) being:
 - Searching the web
 - Listening to music
 - Reading personal email
 - Watching YouTube-style videos
 - Social media

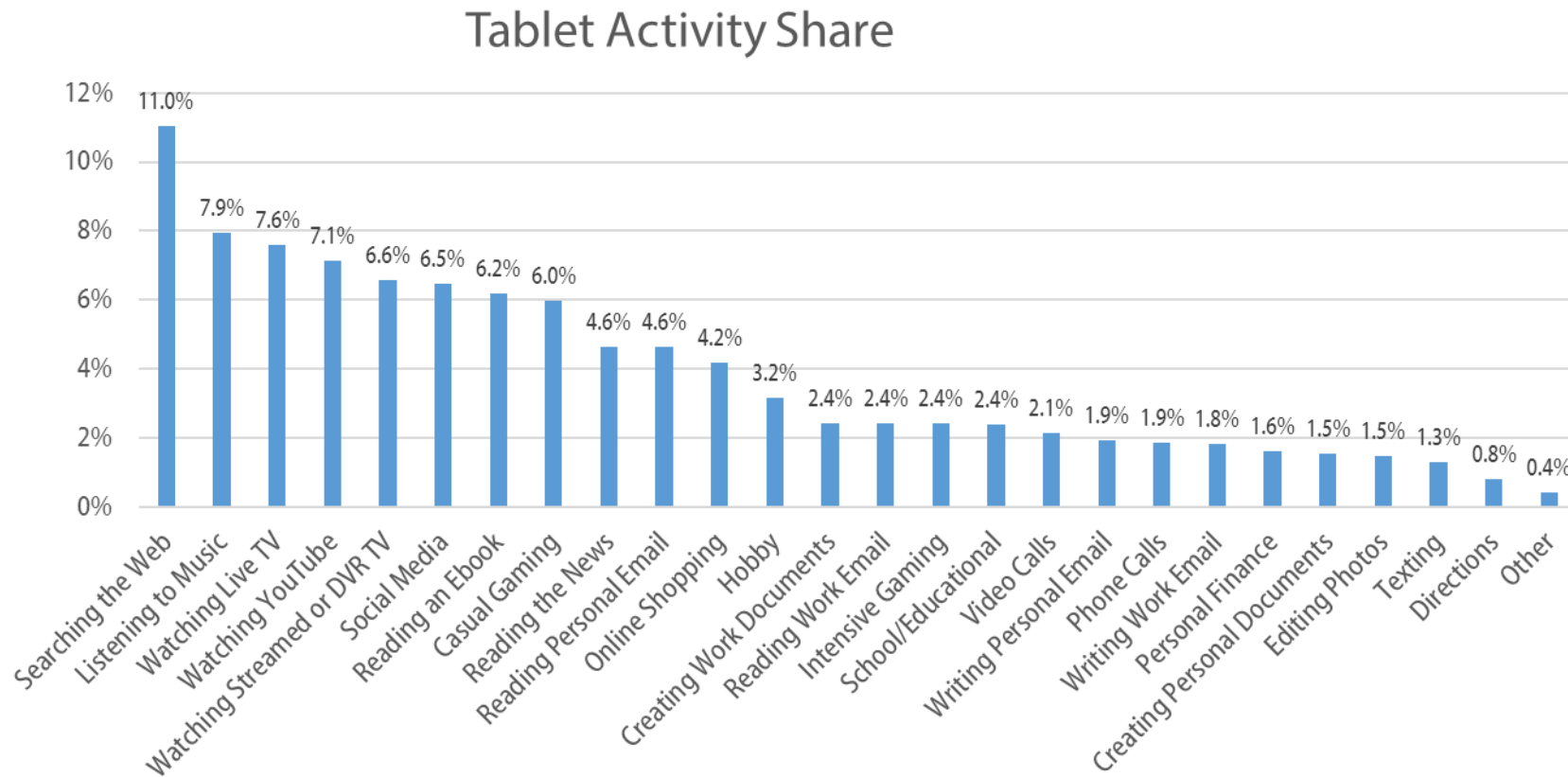


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N=2,823

Tablet Activity Usage

How much time do you spend on each of these activities on devices that you own?



- Tablets are used on average 8.7 hours per week for these activities, with a heavy focus on video
- The top 5 are:
 - Searching the web
 - Listening to music
 - Watching live TV programming
 - Watching YouTube-style videos
 - Watch streamed/recorded TV programming

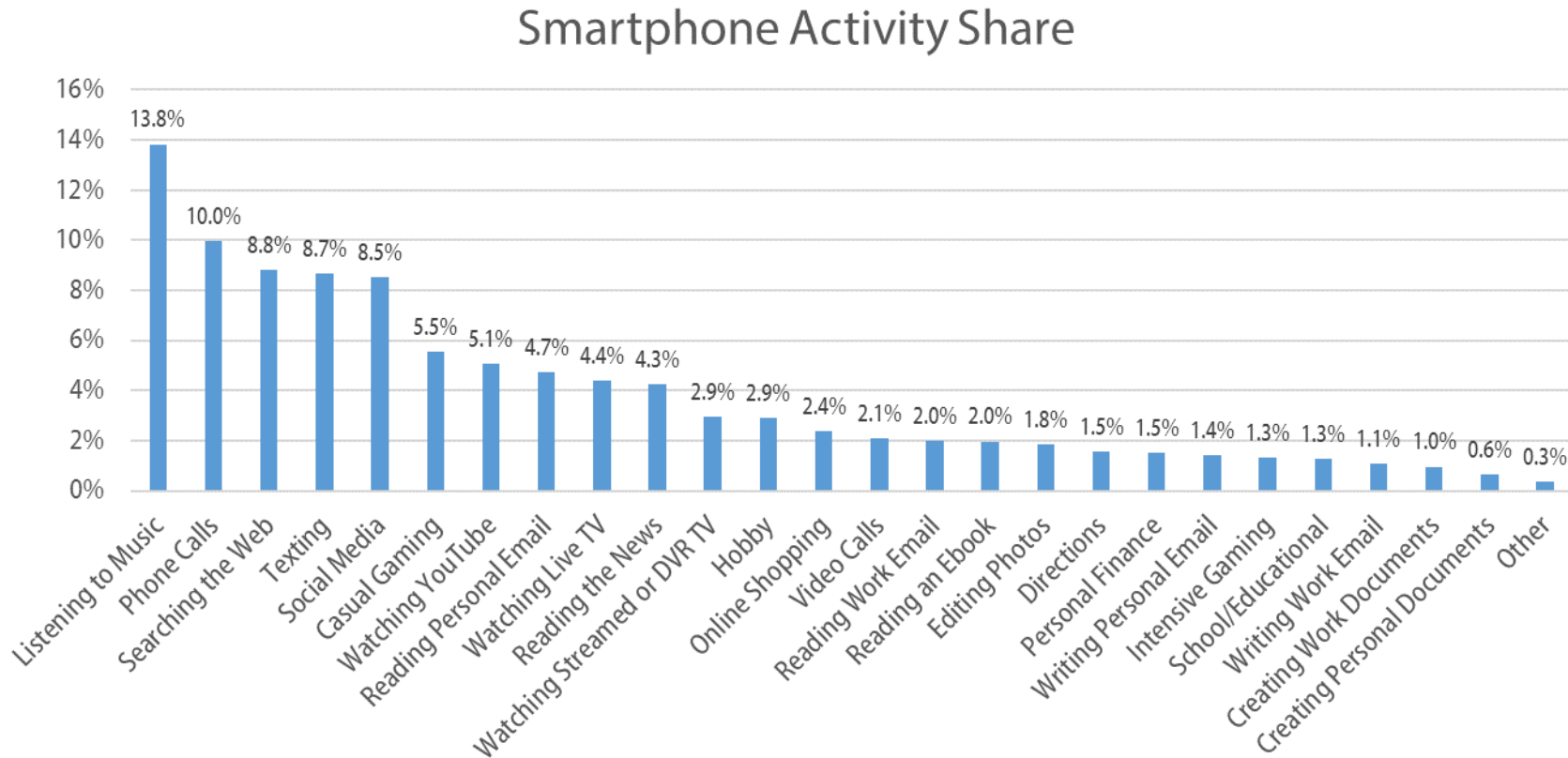


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N=1,983

Smartphone Activity Usage

How much time do you spend on each of these activities on devices that you own?



- Smartphones are used on average 17.3 hours per week for these activities and have a very different focus than the other devices
- The top 5 activities on smartphones are:
 - Listening to music
 - Making phone calls
 - Searching the web
 - Texting
 - Social media



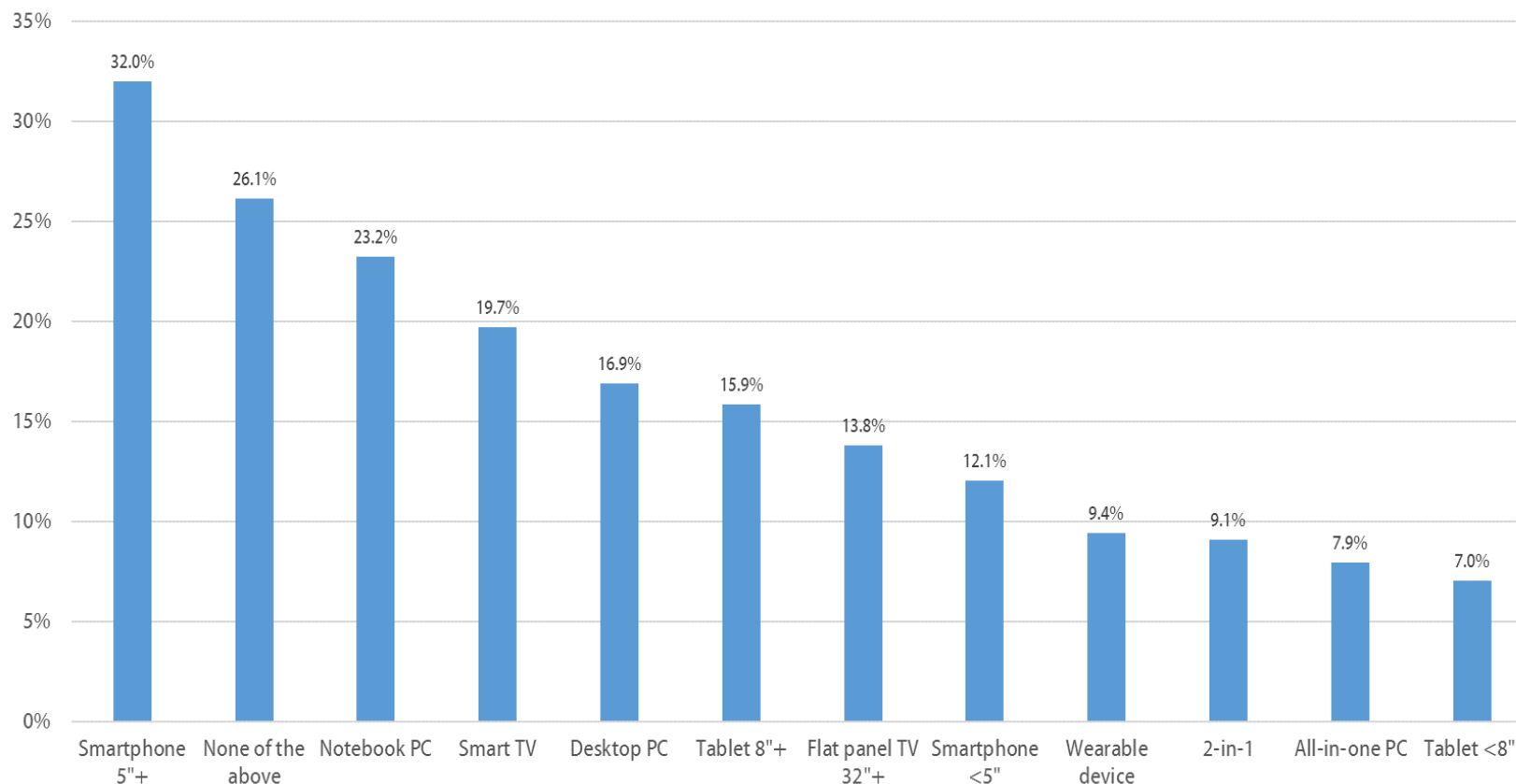
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N=2,880

Planned Device Purchases

What devices do you expect to purchase over the next 12 months?

Planned Purchases



- Looking ahead, there continues to be very strong interest in larger screen smartphones, with almost 1/3 of respondents saying they expected to purchase one over the next year
- After those planning to purchase nothing, notebooks, smart TVs and desktop PCs were the next highest choices

Conclusions

- PC opportunity is still real
 - PCs are still the device people use for the majority of their “digital activities”
- Key differences by age group, as expected, but messaging should adjust to those realities
 - Older consumers like and are comfortable with PCs
 - Younger consumers also showing increasing interest in PCs
- Focus messaging on most important activities
 - For notebooks, browsing, listening to music, email and consuming YouTube-style videos
 - For tablets, browsing, listening to music, and consuming live video, streaming video and YouTube-style video
- Though industry interest is high, still little consumer interest for 2-in-1s
 - People want a good notebook

Contact



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