Computers & Tablets

Description: Computers & Tablets

Summary:

Computers and Tablets in United Kingdom (UK) will grow at a modest 0.4% in 2017, as price inflation reduces consumer appetite to spend on big-ticket items. The market will recover relatively quickly; however, volume growth will not reach historic levels of 5% until 2021. Growth in the category will be driven by the essential nature of laptops, which will grow 18.9% over the next five years, and will account for over half of the computers and tablets market. The tablets market is forecast to decline by 10% over the next five years. While smartwatches & fitness bands only make up a small proportion of the overall market, there will be continued innovation in this category over the next five years.

Dixons Carphone market share in UK grew by 0.6% in 2017 to reach 25.4%, following the roll out of its 3-in-1 stores. Amazon's market share has increased the most (+0.7%) as online purchases increase and consumers are attracted by Amazon's subscription service, Amazon Prime. Tesco has lost the greatest market share (-0.2%) as the retailer shifted its focus from non-food to food.

The entrance of AO.com into the computers and tablets market in Q4 2016 is a significant market shift and will be of concern for C&T retailers, particularly at the value end of the market. The online pureplay will have a competitive advantage with its extremely efficient fulfilment services. Furthermore, AO's recently opened warehouse in Heathrow will drive growth in the south.

Consumer penetration of laptops and notebooks is the highest across categories surveyed, with 26.7% of people saying they have purchased an item from this category within the last year, narrowly ahead of tablets & e-readers (23.4%). 66% of shoppers cited low prices as the primary driver of store choice. It is not just the online pureplays that compete on price, as multi-channel retailers, such as John Lewis and Dixons Carphone, provide price matching guarantees to boost their appeal towards price conscious consumers.

The report “Computers & Tablets” provides comprehensive insight and analysis of the United Kingdom (UK) market, the major players, the main trends, and consumer attitudes. It also provides forecasts to 2022.

It provides in-depth analysis of the following -
- An analysis of the key strategies for success in this market, as well as the most important market issues.
- Detailed data on the size of the market, the key drivers, and how spend is distributed.
- Profiles of the major players, and analysis of the key trends driving the market.
- Insight on whose consuming, what they are buying, where they are buying, and what makes consumers purchase.

Companies mentioned in this report: Amazon, AO.com, Apple, Argos, Asda, Dixons Carphone, John Lewis, Sainsbury's, Tesco.

Scope:

- Despite only making up a small proportion of the overall computers & tablets market in 2017, the smartwatches/fitness bands sector will be an important area of growth for retailers as the sub-category grows over 50% over the next five years. This will be driven by the continuing fitness trend, with prominent brands such as Fitbit and Jawbone continuing to innovate.
- The computers & tablets sector continues to suffer from the growing functionality of mobile phones as they cannibalise sales from areas such as tablets. The increased size of mobile phones in recent years, with the iPhone 7s plus having a 5.5-inch display, compared to just four inches on the iPhone 5s, mean that consumers can now watch TV and play games on their phones with ease.
- Smaller brands will be under far greater pressure from inflationary headwinds as consumers will be less prepared to absorb price increases. As a result, smaller brands may struggle in the market as margins are squeezed.
- AO.com's entry into the market will be of significant concern for retailers in this category given its track record for entering previously uncharted territory and quickly gaining market share (e.g. its entrance into
the audio visual market in 2014).

Reasons to buy

- Utilise our five-year forecasts to 2022 for individual sub-categories, online penetration and channels of distribution to enable targeted investment in high performing areas.
- Identify the major brands and manufacturers in the computers & tablets market and utilise our in-depth analysis of how and why each retailer is performing as it is in the market to allow for benchmarking and a strategic advantage.
- Recognise which consumers to target and how to drive spend from them by utilising our shopper penetration data and understanding what influences their retailer selection and spending motivations.
- Understand how the online channel can be better utilised to sell computers & tablets items by using our online penetration and expenditure forecasts and analysis on channels and online fulfilment.

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