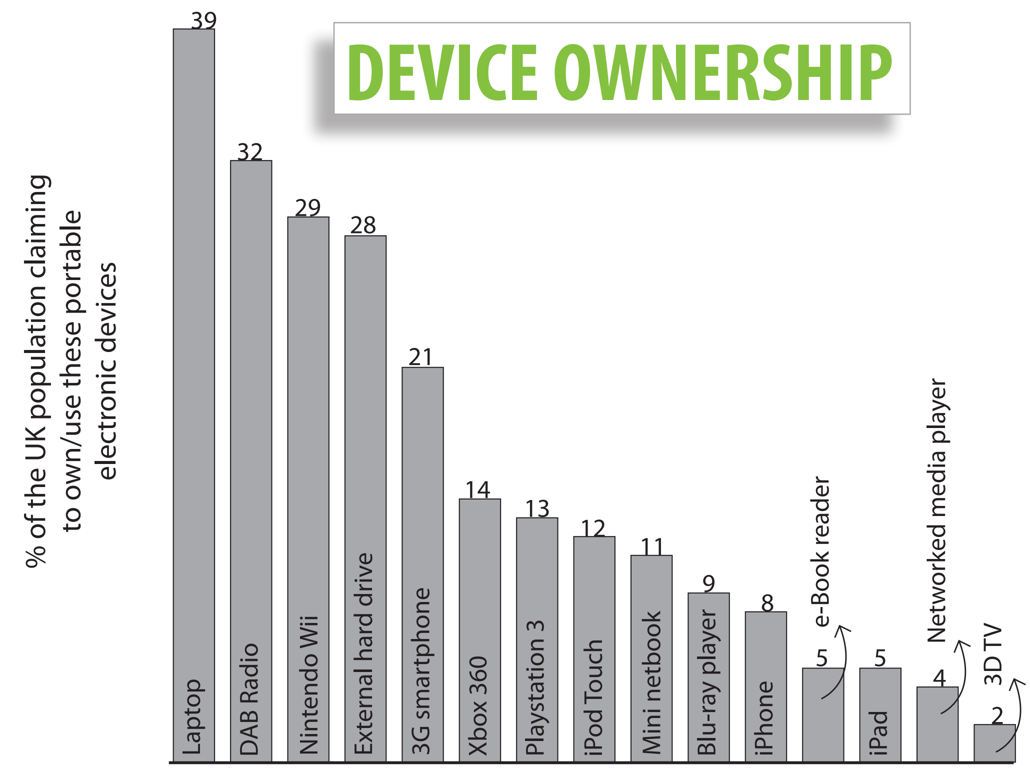
harris INTERACTIVE

PORTABLE DEVICES RESEARCH REPORT

INTRO

As more and more tech devices come onto the market, UK consumers are faced with increasingly difficult choices given most do not have sufficiently deep pockets to acquire everything they desire. This report attempts to understand which portable devices the public desires and how choices are made between them. It also explores how and where consumers would use these devices and strives to understand broad attitudes and relative purchase drivers for each portable device.

DEVICE OWNERSHIP



% of each group claiming to own/use these devices

	Laptop	DAB Radio	Nintendo Wii	External hard drive	3G smartphone	Xbox 360	Playstation 3	iPod Touch	Mini netbook	Blu-ray player	iPhone	e-Book reader	iPad	Networked media player	3D TV
Male	40	36	27	33	26	17	16	14	11	11	10	7	7	6	4
Female	38	29	32	24	16	11	10	10	11	6	6	3	2	2	1
16-24	44	22	38	37	34	24	24	19	14	14	15	5	5	6	3
25-34	41	31	44	30	29	25	26	19	18	15	18	9	11	12	6
35-44	41	30	42	27	25	19	15	10	13	9	6	3	2	3	2
45-54	39	39	25	31	20	14	9	9	11	8	8	3	2	1	1
55+	33	35	13	24	8	2	2	5	6	4	2	4	1	1	1

↑%

Apple, HTC, Blackberry, and LG mobile brand users tend to skew above average for device ownership.

As you would expect, younger consumers are more likely to own devices, however it is worth noting that a considerable amount of older consumers online own or access tech devices.

KEY POINTS

EXECUTIVE SUMMARY

» There is a growing reliance on portable devices, with increasing numbers of UK consumers using hi-tech devices.

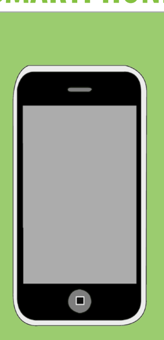
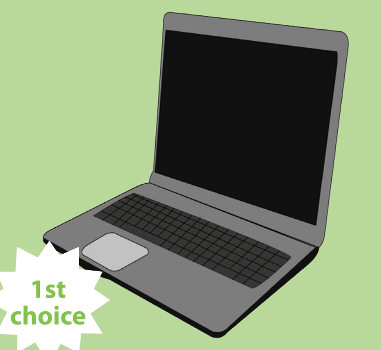
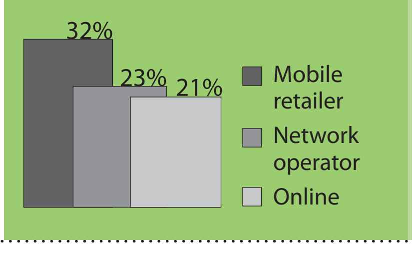
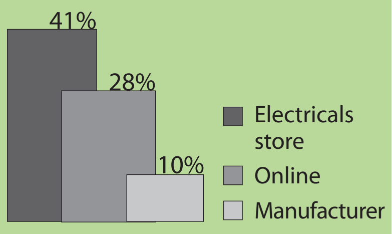
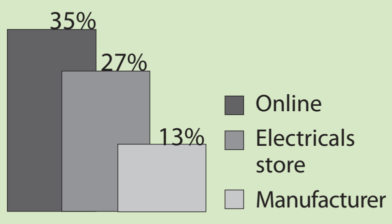
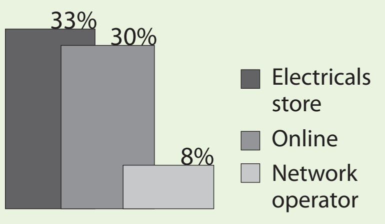
» A digital divide exists between age groups, but substantial numbers of older consumers are in touch with tech.

» As more and more attractive form factors and models arrive on the market, consumers are faced with increasingly difficult choices when choosing a product and brand.

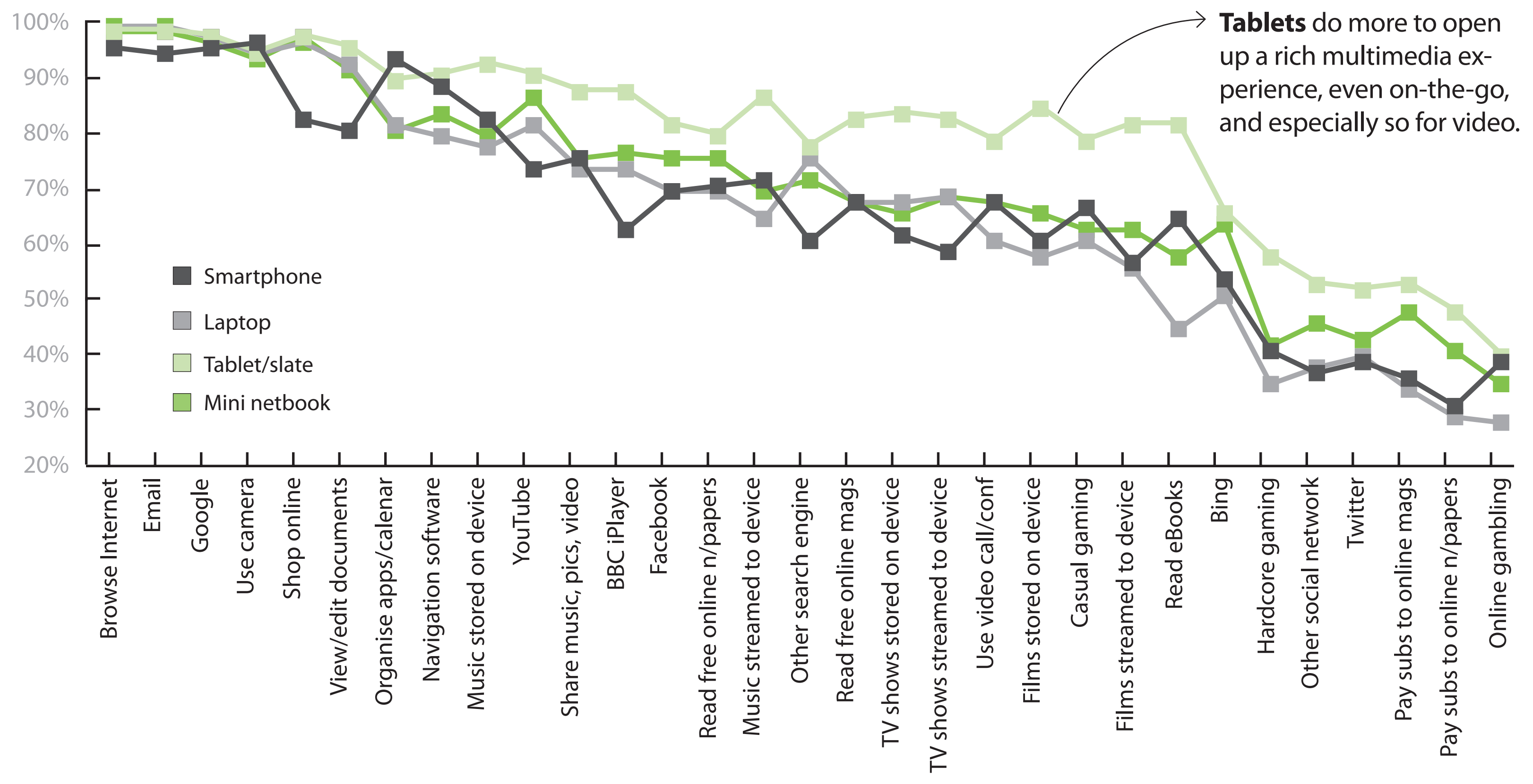
» Future purchase intentions and brand consideration results indicate that there is a strong emotional connection with Apple in the portable device market.

» Although most devices are used for entertainment purposes, new-to-the-market tablets are found to be used more than other devices for video and casual gaming.

COMPARING DEVICES

	SMARTPHONE	LAPTOP	TABLET/SLATE	MINI NETBOOK
		 1st choice		
We asked our nationally representative sample to imagine they own none of these devices, but had the money to buy all of them.	**79%** of the population said they would choose a smartphone in their top three preferences. This was the most frequent second choice, and was disproportionaly favoured among those aged **16-24**.	**89%** of the population said they would choose a laptop in their top three preferences. **61%** would choose this first, which is consistent among both genders and all age ranges.	**52%** of the population said they would choose a tablet in their top three preferences. This was the most frequent third choice, with early adopters having a significantly higher preference than others.	**34%** of the population said they would choose a mini netbook in their top three preferences.
Which factors would drive your purchase decision the most?	Cost/value; Reliability; Battery life	Cost/value; Reliability; Memory capacity	Battery life; Reliability; Cost/value	Battery life; Cost/value; Reliability
Where would you be most likely to purchase the device?				

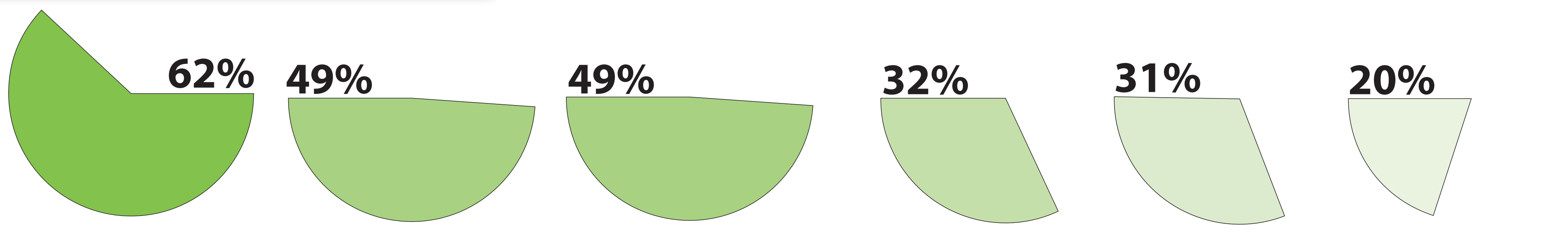
Which of the following work or leisure activities would you ever use the device for?



Tablets do more to open up a rich multimedia experience, even on-the-go, and especially so for video.

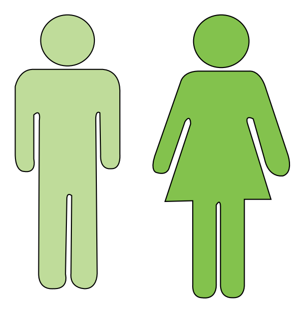
DEVICE ENGAGEMENT

We asked the nationally representative sample some questions to gauge the personal value of portable devices among the general public. Shown below are the percentages of people who agreed with the statements.



62%	49%	49%	32%	31%	20%
My devices help me **stay close** to my friends and family.	I like to **personalise** my devices.	It is important to me to **be contactable** wherever I am.	I rely on my electronic devices to **organise my life**.	My electronic devices make me **feel good** about myself.	I'd like my phone or other gadget to replace my **credit/travel** cards.

Males were more likely than females to answer that they like to use devices to **personalise** and **organise their lives** and that their devices made them **feel good** about themselves.



Females were more likely than males to feel that their devices help them **stay close** to friends and family.

16-24 This age group's engagement was **above** average for all statements.
25-34 This age group's engagement was **above** average for all statements.
35-44 This age group was only above average for **personalising** devices.
45-54 This age group's engagement was **below** average for all statements.
55+ This age group's engagement was **below** average for all statements.

RESULTS ARE BASED ON A RANDOM POLL OF 2,223 UK RESIDENTS AGED 16-64. THE POLL WAS CONDUCTED ONLINE DURING MARCH 2011 USING THE HARRIS POLL OMNIBUS.
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