Exploring our digital dependence

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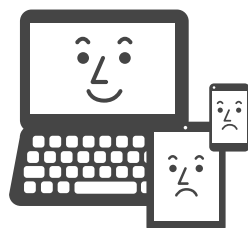
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In this study:
PCs at center of our digital lives
STUDY HIGHLIGHTS:

97%
of households say a PC is their primary computing device.

83%
of respondents say PCs are more productive for many tasks than smartphones or tablets.
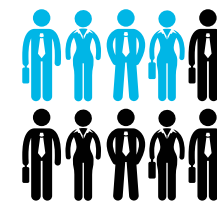
1/2
US consumers spend one-half of their digital device time on a PC.

21h+
PC owners spend more than 21 hours/week using a PC.

4 IN 10
of all respondents indicate they are likely to buy a new PC within a year with parents & millennials at 54%.
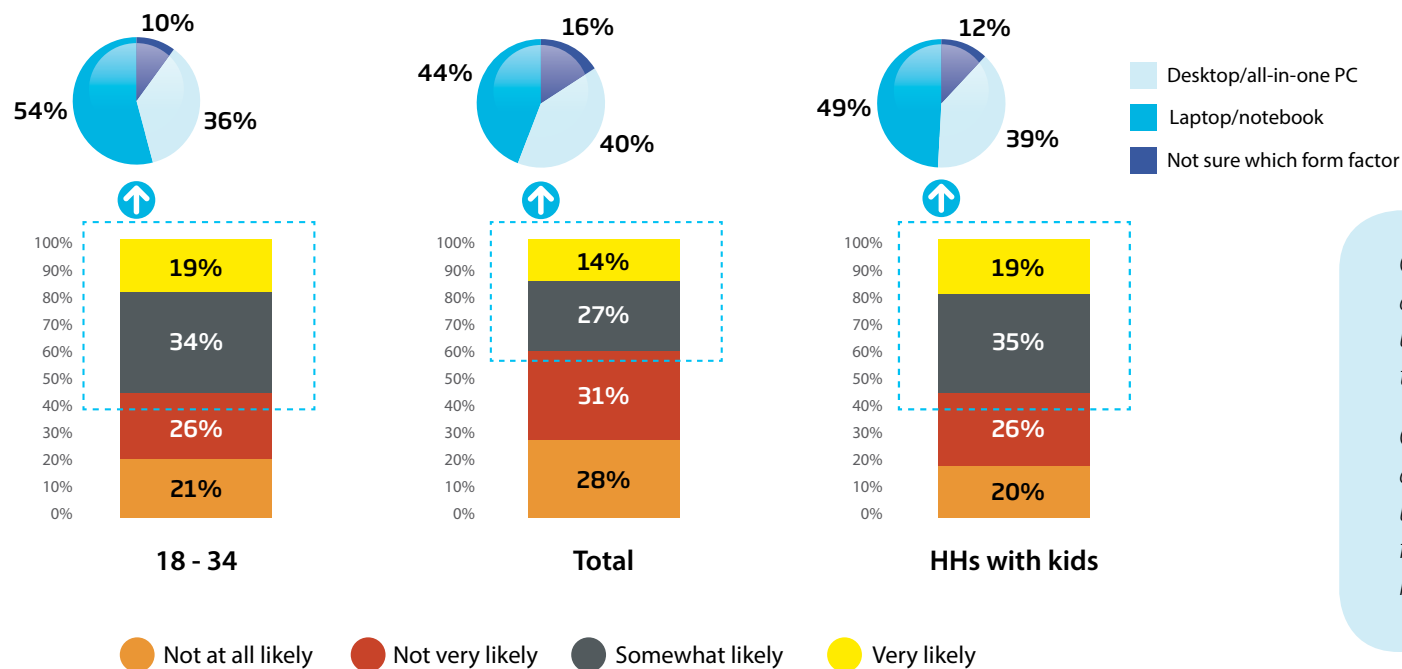
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Wanted: PCs
50% of families and millennials report likely to buy

Families & millennials reported the highest likelihood to purchase a PC within the next year.
50% of young adults, having grown up with PCs, have higher expectations for and dependency
on their technology—specifically their PCs—driving stronger interest in upgrades.
Among all respondents, 40% said they were likely to buy a PC within 12 months.

18 - 34

Pie chart: 10%, 36%, 54%

Bar chart:
- 19%
- 34%
- 26%
- 21%

Total

Pie chart: 16%, 40%, 44%

Bar chart:
- 14%
- 27%
- 31%
- 28%

HHs with kids

Pie chart: 12%, 39%, 49%

Bar chart:
- 19%
- 35%
- 26%
- 20%

Legend (pie charts):
- Desktop/all-in-one PC
- Laptop/notebook
- Not sure which form factor

Legend (bar charts):
- Not at all likely
- Not very likely
- Somewhat likely
- Very likely

Q9. How likely are you to buy a new PC or Laptop/Notebook (excluding tablets) in the next 12 months?

Q10. You mentioned that you are very/somewhat likely to buy a new PC. What type of form factor PC are you thinking about purchasing?

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PC dependence

PCs trump 5 Cs: Crunches, chocolate, caffeine, cable and car

Percentage of people willing to sacrifice the following in place of their PCs
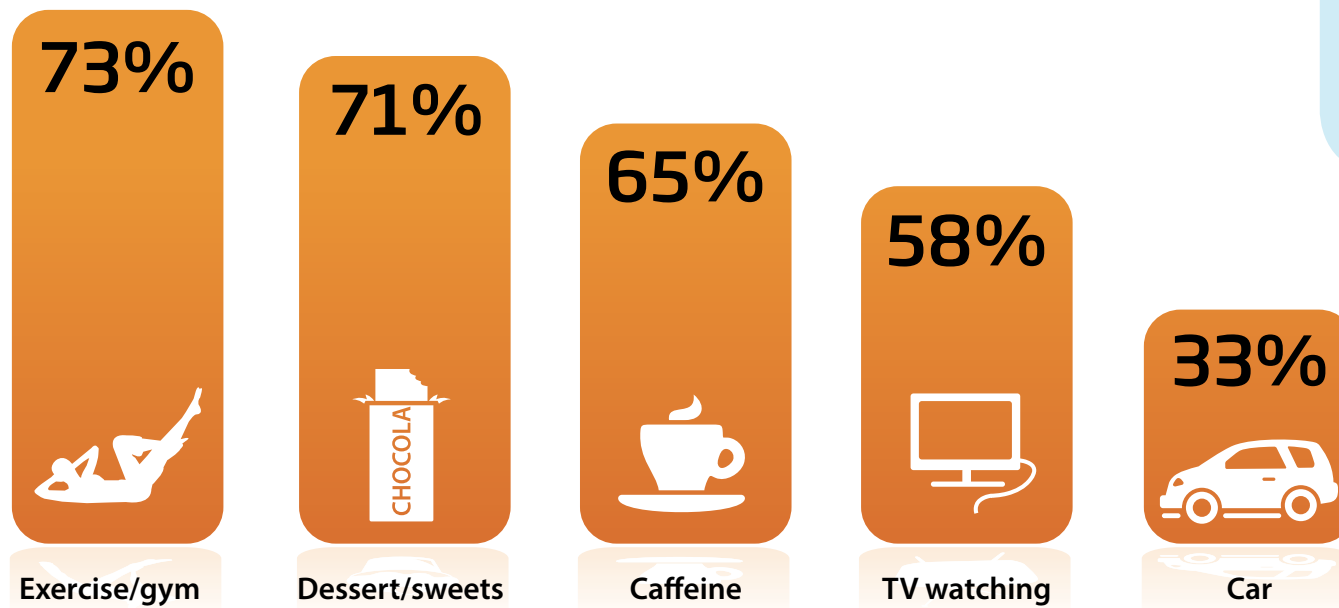
Q20. If you had to give up one of the following for one week, which would be easier to sacrifice for that one week?

73%

71%

65%

58%

33%

Exercise/gym

Dessert/sweets

Caffeine

TV watching
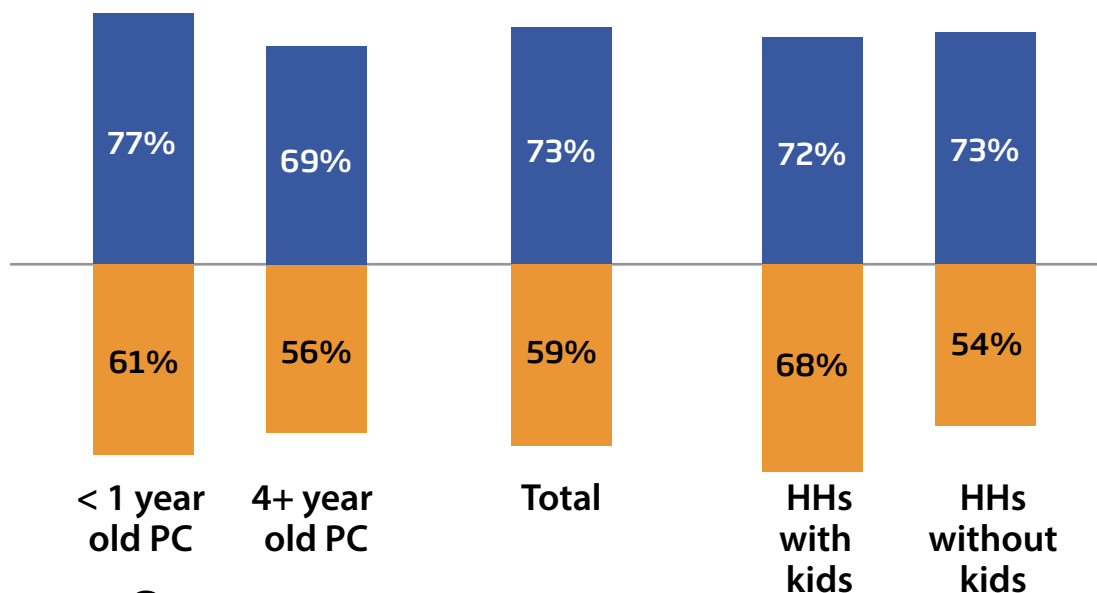
Car

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PC = Daily stress buster
Consumers busier, but PCs help lighten the load

Most US consumers believe their lives are more hectic than they were four years ago, but 3 in 4 of them believe that PCs help them manage some of the additional stress. Not surprisingly, newer PC owners were even more enthusiastic about how their devices help them in their daily lives.

■ My computer helps alleviate some of my daily stresses

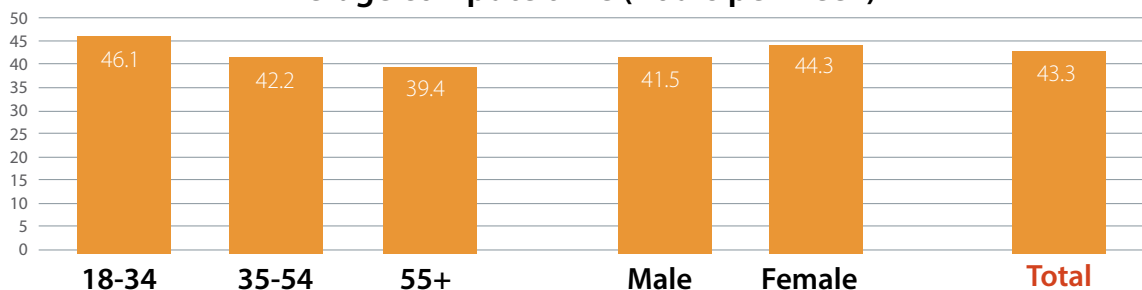| < 1 year old PC	4+ year old PC	Total	HHs with kids	HHs without kids
77%	69%	73%	72%	73%
61%	56%	59%	68%	54%

■ Today, my life is busier, more demanding than 4 years ago

Q17. Please indicate whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each of the following statements.

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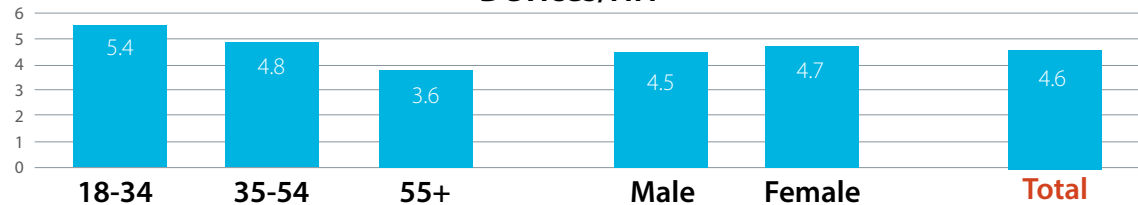# Tech obsessed: We like our gadgets but love our PCs
We spend more than 21 hours per week on our PCs

These PC households own and use 4.6 compute devices. Given its breadth of capabilities, the PC dominates the 43+ hours per week spent on these gadgets.
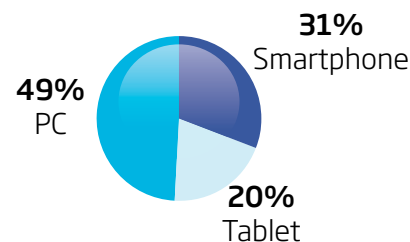
Average compute time (hours per week)

18-34	35-54	55+	Male	Female	Total
46.1	42.2	39.4	41.5	44.3	43.3

Devices/HH

18-34	35-54	55+	Male	Female	Total
5.4	4.8	3.6	4.5	4.7	4.6

Proportion of time spent by device

- 49% PC
- 31% Smartphone
- 20% Tablet

Q3. In addition to the primary PC that you own and personally use, how many additional computing devices do you have in your home that you/your family/roommates personally purchased (i.e., were not paid for by employers)?

Q4. Thinking about the total time you spend using these devices in a typical week, approximately how many hours are spent with each per week?

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PC = Productivity machine
8 in 10 PC owners rely on their PCs to "get it done"

Americans have been purchasing smart-phones and tablets at very high rates in recent years, and this survey found ownership levels of 64% for smartphones and 45% for tablets. Despite the adoption of these exciting and new technologies, 83% of PC owners agree that for some activities, they are more productive on a PC than on a smartphone or tablet. This indicates these devices are largely complementary.

There are some activities for which a PC is far more productive than tablet or smartphone (% who agree)
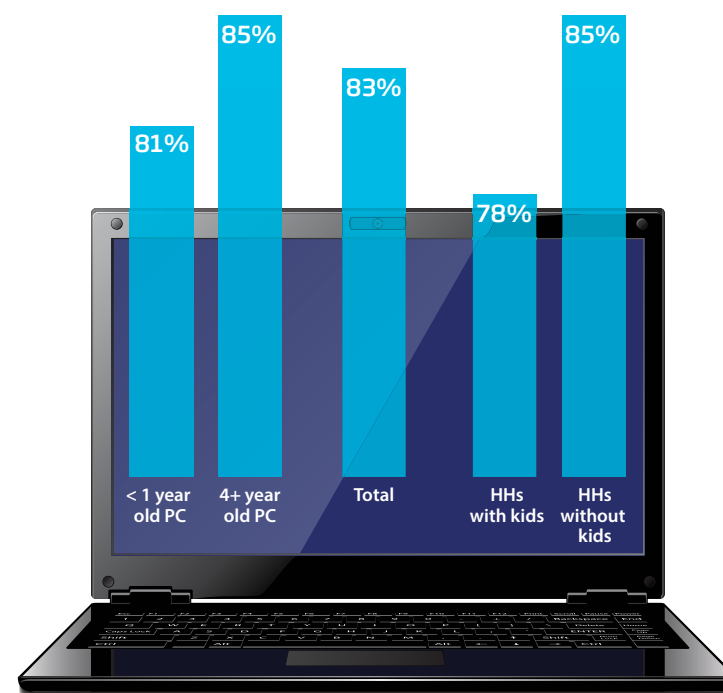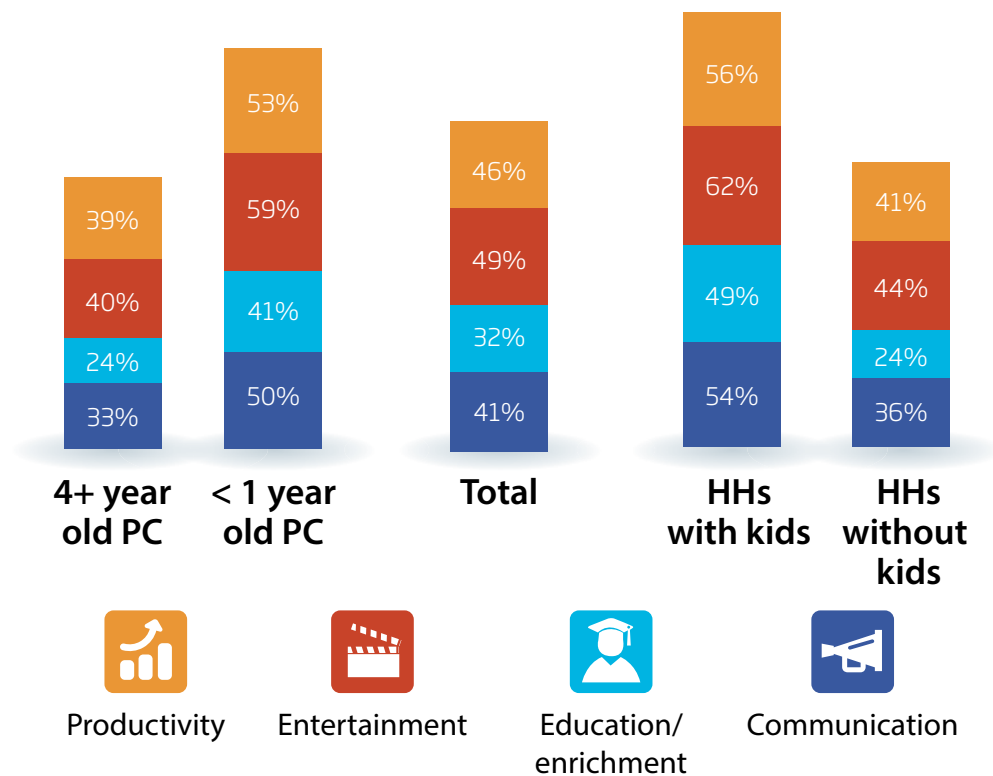
< 1 year old PC	4+ year old PC	Total	HHs with kids	HHs without kids
81%	85%	83%	78%	85%

Q17. Please indicate whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each of the following statements.

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PC: Our digital assistant

PCs continue to deliver multifaceted value to consumers: productivity, education, communication, and entertainment. Across the board, owners of newer PCs are more likely to use every kind of application than those with older systems, as is true for families (versus households without kids).

Applications used on primary PC at least several times per month

	4+ year old PC	< 1 year old PC	Total	HHs with kids	HHs without kids
Productivity	39%	53%	46%	56%	41%
Entertainment	40%	59%	49%	62%	44%
Education/enrichment	24%	41%	32%	49%	24%
Communication	33%	50%	41%	54%	36%

Productivity   Entertainment   Education/enrichment   Communication

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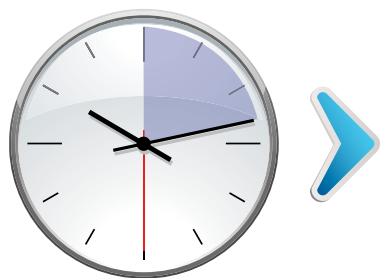Exploring our digital dependence

Pet peeves — Hate to wait!
We spend an average of 3 days waiting per year (12.7 minutes x 365 days)

What we are waiting for
Time spent waiting: Somewhat + very frustrated

■ PC age: 4+ years
■ PC age: <1 year

13 minutes
Spent waiting per day

PC age: 4+ years

29%
19%

Loading a
web page

39%
21%

Waking up/turning on/
booting up

26%
18%

Powering down/
turning off
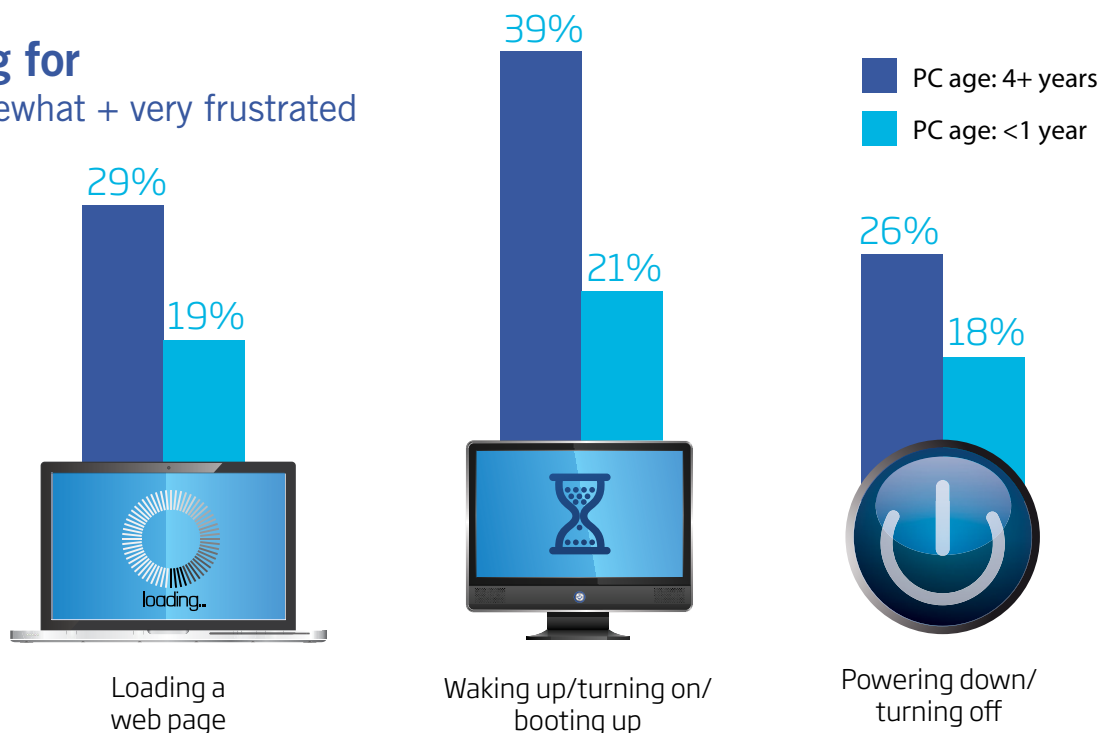
*Q14. How do you feel about the length of time spent waiting to do the following activities on your primary computing device? Q15. You indicated you spend time waiting for your computing devices to do the following activities each day. Which of these do you find the most frustrating? Please select only one.*

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Why people buy new PCs
Performance & price drive PC upgrades
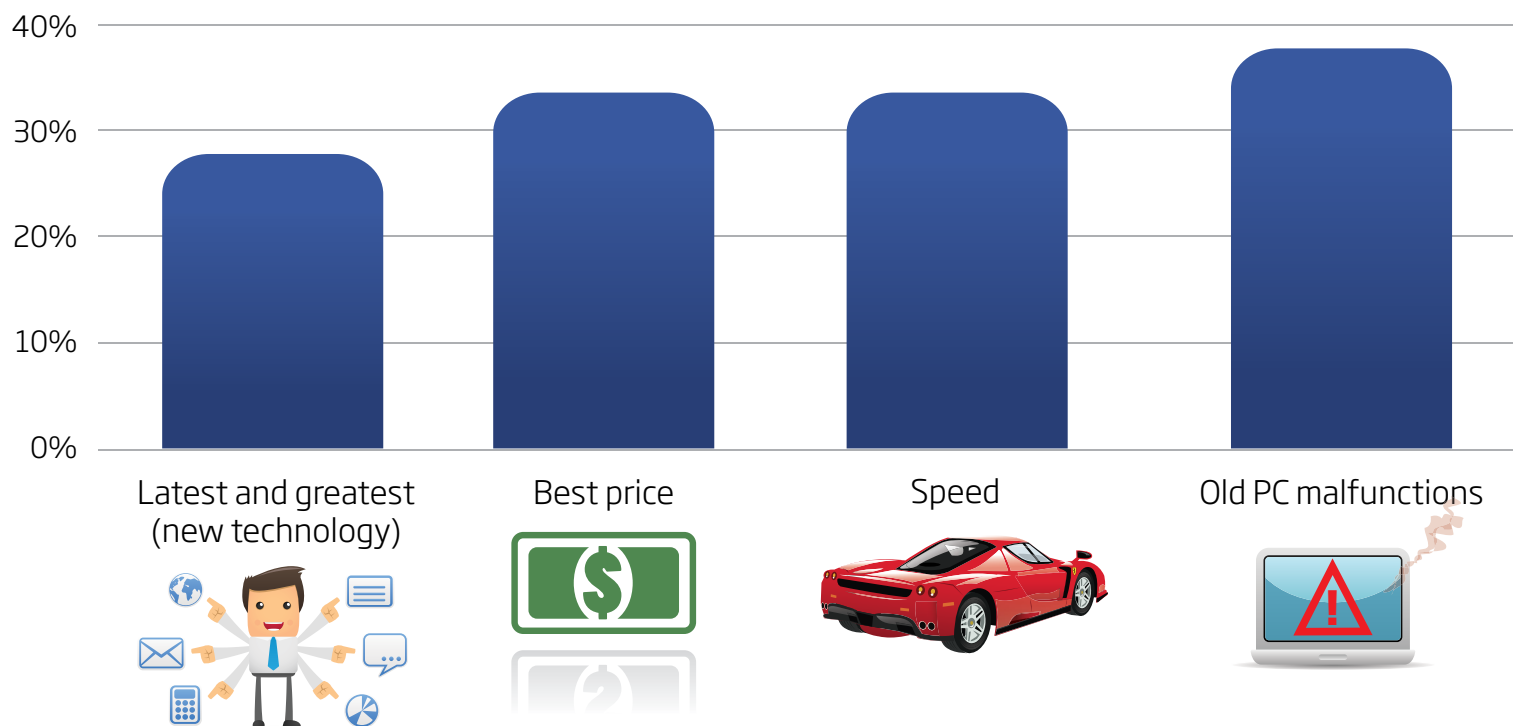
Q8. Which of the following, if any, would make you more likely to purchase a new primary computer in the next 1-2 years? Select all that apply.

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Performance matters

Performance and price are still the major drivers for PC refresh, but IDC believes consumers with older systems don't realize how much better the experience can be with a new PC.
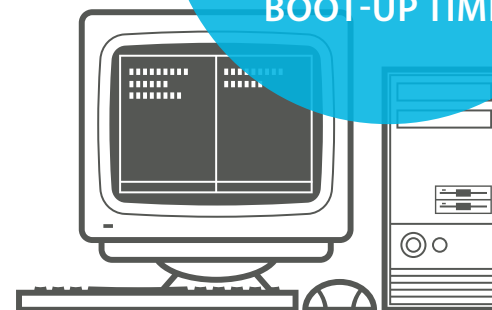
PEOPLE WITH OLDER PCs ARE TWICE AS LIKELY TO BE FRUSTRATED WITH THINGS LIKE BOOT-UP TIME

THOSE WITH NEW PCs ARE EVEN MORE LIKELY TO BUY ANOTHER NEW PC WITHIN A YEAR

150%
Those with new PCs are 150% more likely to use productivity, entertainment, communication and education applications than those with older PCs

23%
Those with new PCs spend 23% less time waiting for their systems to respond than people with older PCs

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In conclusion

IDC's findings from this study demonstrate that those who own new PCs believe they are more productive and satisfied and are even more likely to buy another PC in the coming year.

With 30 million consumer PCs forecast to ship in the US this year, IDC believes that as Americans learn the benefits of new systems, the upgrade cycle will continue to deliver better and better experiences.

IDC FORECASTS 30 MILLION CONSUMER PCs WILL SHIP IN THE US THIS YEAR.

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Methodology

IDC conducted an online survey of 3,977 adults (18+ years old) across several major cities and in suburban and rural areas across the United States in June 2013. All respondents had at least one PC (Windows or Mac). We structured the sample to have quotas to capture roughly half the respondents who purchased a PC in the past 12 months and half who last bought a PC 4 or more years ago. We also targeted the sample to be split among age groups and gender. The data reported here is not weighted.

This study was designed to examine how consumers use and feel about their computing devices and to seek out differences by region, demographics, age of PC, etc. 45% of respondents had at least one tablet, and 64% had at least one smartphone.