



Do 'home-made hybrids' represent the beginning of the end for laptops?

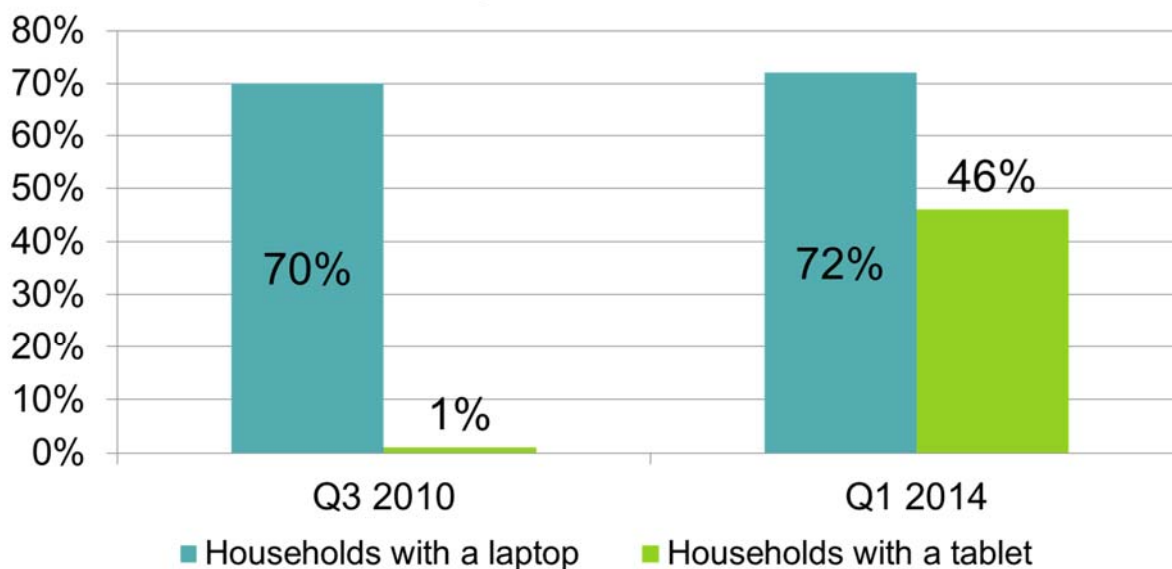
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Laptops have remained remarkably resolute in the face of tablets. Russell Feldman, Technology & Telecoms Director at YouGov, argues that manufacturers of all-in-one devices face an up-hill struggle in pushing hybrids and convertibles as a laptop replacement. Instead, consumers have already started making their own content and creation machines.

Since tablet devices first entered the UK market en masse in 2010, laptop penetration has remained steady. [YouGov's Tablet Tracker](#) shows that since Q3 2010, just after the launch of the first iPad, 70% of households had a laptop. In Q1 2014, 72% did. In the same timeframe, tablets grew from being in 1% of households to 46%, making it the fastest-growing piece of technology of modern times.

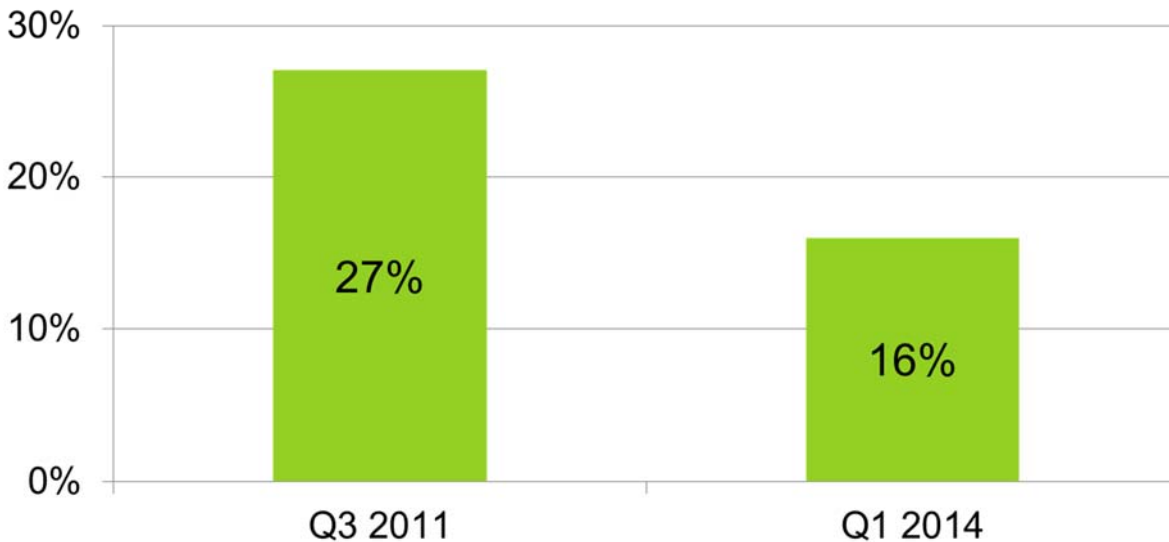
Laptop and tablet ownership – by household



Far from killing laptops, iPads and their like have buttressed their position in the market. This is because consumers have bought tablets in addition to, rather than as replacements for, laptops. Since they entered the mainstream, tablets have increasingly catered to the consumption crowd (for activities like watching content) leaving laptops to be the creation machine (used for such things as writing and editing documents).

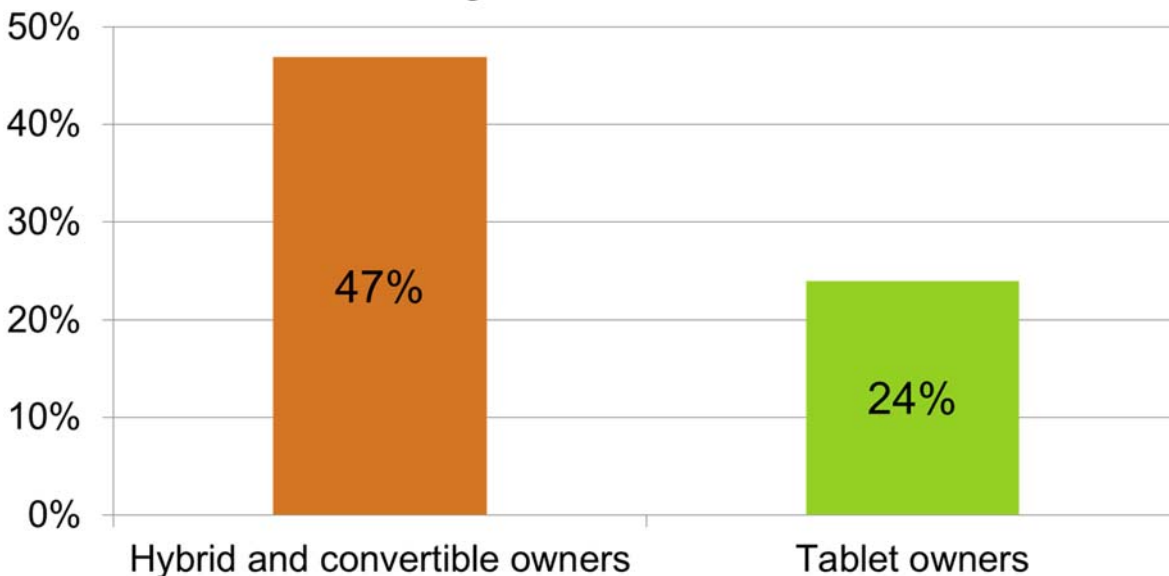
In fact, as more people use tablets, a lower percentage of device owners have used them to create. In Q1 2014, just 16% of tablet owners said they edited documents on their device, a fall of eleven per cent since Q3 2011. It is clear that ever since tablets entered the mainstream consumers have treated and used them differently to laptops and desktops. In Q1 2014, only 7% of tablet owners purchased their device as a replacement for a computer – a figure that has barely changed since Q1 2011 when it was 8%.

Number of tablet owners editing documents on their device



Against this rapid increase in tablet ownership, manufacturers have pushed hybrids and convertible devices to try square the circle between laptops and slates and have one machine for both creation and consumption. And among those who own one of the two-in-one devices, it seems that this is how they see them. Presently, over half (56%) of hybrid and convertible owners believe that their device is both a tablet and a laptop, while 47% create content on their device compared to just 24% of tablet owners.

Do you create content on your device?



However, manufacturers' efforts to push convertibles and hybrids have been largely met with public indifference. One of the main problems is that not many people know about them – 55% of consumers cannot name any convertible manufacturers, and 59% can't name any hybrid makers. Part of the issue is around having different names and terms for what are – in the eyes of the public at least- pretty similar machines. Many people are unable to say how a convertible differs from a hybrid and whether either is an “all-in-one” any more than most can detail the differences between a Chromebook, netbook, laptop, or notebook.

Also, at the moment it seems consumers are being priced out of the market. With both having recommended retail prices of around £650 it is not very surprising that only around 1% of people are interested in getting either one of the devices. Given these difficulties for convertibles and hybrids, can any device unify the content and creation requirements of the consumer and make a dent on laptop penetration?

The rise of the “home-made hybrid”

Our analysis indicates that the device most likely to make an impression on the laptop's numbers will be neither a traditional hybrid nor convertible. YouGov's data suggests that knowledge of hybrids and convertibles is so low that even those who own either of the devices are unsure of exactly what they have. We found that nearly half (48%) say their “hybrid” is on Android despite this OS not being widely available on conventional hybrid devices at present. Essentially, many people who claim to have “hybrids” actually have tablets they have bought a keyboard for so they can use them for work as well as leisure.

It seems that with these “home-made hybrids” consumers have themselves created a winning “two-in-one” device that handles both content and creation. From the user's perspective, they seem to be a logical solution for the future. Given the rapid rise of the tablet over the past few years, many consumers already own a new device they have invested a fair amount of money in and, with the simple, inexpensive addition of a keyboard, they can enjoy the functionality of a laptop without having to spend a lot more cash.

“Home-made hybrids” are also logical from a work perspective. The emergence of Bring Your Own Device (BYOD) policies means organisations are increasingly looking to reduce costs through subsidising personal devices for company use. YouGov's study shows that 20% of convertible owners had their devices purchased by an employer compared to 11% of hybrids and just 5% of tablets. However, last year almost a fifth (19%) of senior managers and directors in the UK used their personal tablet for work purposes. Given the move towards BYOD and associated security policies, why would businesses invest in big new devices if they can subsidise the user's own tablet at a fraction of the cost?

Conclusion

Laptops have survived in the past few years because they can do what tablets can't – namely, create content. In pushing hybrids and convertibles, manufacturers have tried to persuade the public and businesses to buy yet another new device at a time when large numbers are splashing out on tablets. Understandably, consumers haven't wanted to shell out again for something similar that they have never heard of.

Instead, it seems as though consumers themselves have already found an all-in-one content and creation machine by simply plugging a keyboard into their tablets. Savvy manufacturers should start catering to the creation side of the equation and offer plug in keyboards to consumers.

YouGov's latest Tablet Tracker study shows that 40% of adults and 46% of households currently own a tablet. As a result, it is likely more and more people will go for the "home-made hybrid" approach, especially when their laptop does and they are faced with the choice of replacing it completely or replacing its function through a device they already own. In doing this, we could finally start to see tablets undermine laptop sales.

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