Recent MetaFAQs, TUPdates, and Highlights based on MetaFacts TUP/Technology User Profile research results, with insights for current and recent subscribers.

- Free subscribers receive top-line summaries
- Current enterprise subscribers are also granted access to the supporting tables and charts

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Highlighted in this week's release:

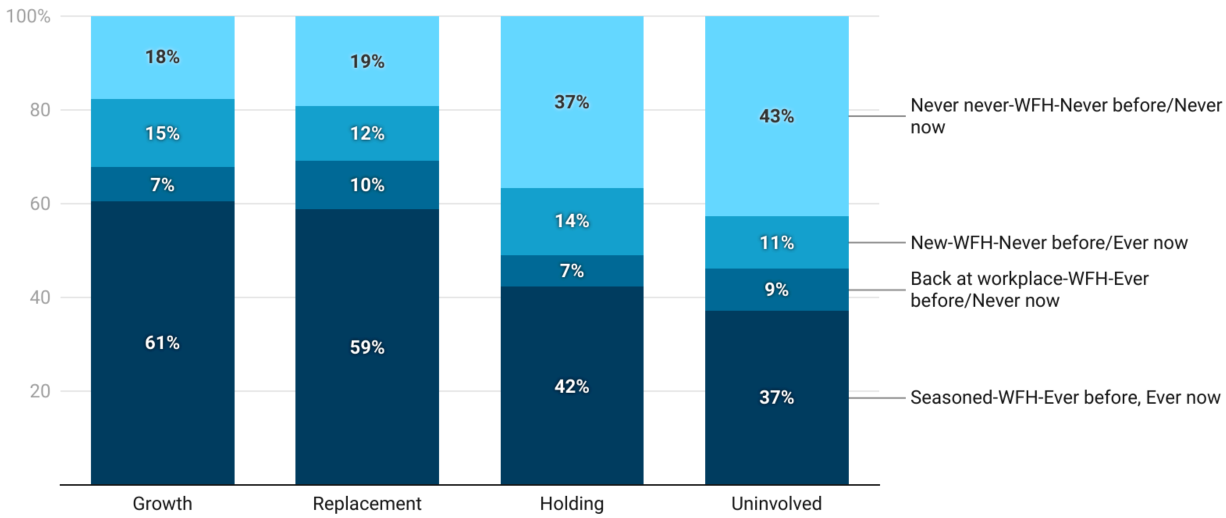
- Home printer market growth quadrants & long-term trends
- Printers Lens - Tables - MetaFacts TUP 2024 Global

Home printer market growth quadrants & long-term trends - The use of home printers has declined as a growing share of technology users increasingly transform their images, documents and interactions to digital. Furthermore, users have migrated many activities away from home computers. This TUPdate identifies the areas with the highest potential for growth and near-term acquisition of home printers.

This research measures the active market penetration rates among global and American adults. Results are based on a survey of 13,561 online adults in the US, Germany, UK, Japan, and China, drawn and weighted to be representative of the online population. From this dataset, MetaFacts screened and profiled 6,609 respondents who are using a home printer or plan to acquire one within the next 12 months. This analysis reports on the market based on user’s current and planned use of a home printer in four quadrants: growth, replacement, holding, and uninvolved. MetaFacts also tapped into its surveys of 109,946 respondents from 2017 through 2024 to detail trends in active home printer and home computer usage. This analysis uses data on home printer brand, home printing activities, current and expected remote work status, employment status, respondent age, and home printer age.

Home printer growth quadrants by remote work status-global employees

61% of employed adults in the **growth** quadrant are seasoned remote workers, having worked from home before the pandemic and working from home now. 59% of employees in the **replacement** quadrant are also seasoned remote workers. The **growth** quadrant includes employees not currently using a home printer, and planning to acquire a home printer in the next 12 months. Employees in the **replacement** quadrant include those who are actively using a home printer and planning to acquire a home printer in the next 12 months either as a replacement or as an additional one.



% of employed adults, n=6,711

Chart: Dan Ness, Principal Analyst, MetaFacts • Source: MetaFacts TUP/Technology User Profile 2024-Global (US, Germany, UK, Japan, China), Table: WFHxHPRGROWTHQUAD • Created with Datawrapper

Summary

- There are headwinds over the long term for home printers as active home printer and home computer usage drops
  - Consumers worldwide are increasingly moving to digital communication, smartphones, or using someone else's printer – workplace, school, or remote printing services
  - All generational age groups are affected, although each in different ways

- Inertia is very real
  - The largest group of home printer users globally is uninvolved, neither using nor planning to use a home printer
  - The second-largest group is in a holding pattern
  - Most active home printer users have older home printers than home computers
  - Users do not replace their printers at a standard rate, and instead some replace relatively new printers while others wait until their printers are much older than average

- There are some glimmers of growth as some small portions (<10%) of each market intend to refresh their home printers or begin using one

- Remote work continues to be a distinguishing factor as employees enhance their remote working environments

Subscriber link to MetaFacts client portal

Printers Lens - Tables - MetaFacts TUP 2024 Global -

From family photos and tickets to recipes and work-related spreadsheets and presentations, printers are a mainstay in homes, home offices, as well as employees of companies large and small.

This lens details printers, printer activities, brands, printer features, supplies, and upcoming purchase plans.

Summary of subjects covered in the TUP Printers Lens: Printers in active use, printer brand, type, features, and other details of the primary and secondary printer, supplies, ink, toner, volume of printing and ink use, printer activities (personal and work-related), purchase channels, and purchase plans. The tables in this set split the total market by country, generation, age group, household size, presence of children, employment status and age group, employer size, employer industry, and work from home status.

Recently released

Sustained interest in smartwatches, although generations differ - Summary
Apple is in a slightly stronger market position in 2024 than in 2023, although the Apple Watch has maintained a steady and dominant interest since 2018. Global purchase plans for Apple Watches outnumber plans for Android Wear smartwatches. Apple has seen strengthening interest among Gen Z adults, a group it has consistently dominated with iPhones. Other earlier generations are successively less enthusiastic.

The aging home computer installed base as most generations delay refreshing - There is an extending home computer downdraft, as home computer users keep them longer than ever Worldwide, the average age of an actively used home computer has risen from 2.3 years old in 2018 to 2.9 years old in 2024.The US is showing a similar pattern. The shift to remote work brought a surge of home computer acquisitions, but now the trend is returning to a pre-pandemic decline. The home computer generation gap has continued, with the oldest computers used by Boomer+ and the newest by Gen Z. Even as Gen Z age past using their first home computer, they are using newer home computers than each earlier generation. Gen X Americans are ahead of the trend, using relatively newer home computers than the worldwide pattern.
During the pandemic, this generation was especially squeezed to work remotely without employer-provided computers and to help children with schoolwork without school-provided technology. But, in 2024, their home computers are older than the ones they used in 2018. An eventually expected widespread RTO/return to office mandate will extend the downward trend in home computer use among remote workers. The long-term trend with the populace migrating regular activities to smartphones will further challenge home computer market penetration rates.

Smartphones overtake computers: device hours shifts since pre-pandemic times - Before the pandemic and economic shifts, online adults worldwide have shifted which devices they use, how they use them, and how often they use them. Two major changes are the shift from feature phones to smartphones and, following that, the transition from computers to smartphones. One measure of this shift is the time users spend with each type of device.

MetaFacts surveyed 81,608 online adults in the US, Germany, UK, and Japan from 2018 through 2024 as part of its annual TUP/Technology User Profile study. Within the survey, as part of detailing the multiple devices that respondents regularly use – smartphones, computers, tablets, and game consoles – we have them report the number of hours they use each device weekly. We aggregate these results for each respondent and then report the mean (average) hours within their country and generational age group.

iPhone and Android switchers, swayed by privacy, learning, and AI attitudes - A hotly contested group of consumers and employees include those switching between using iPhones and Android smartphones. Attitudes about and experiences with AI will likely influence consumer's choices of ecosystems. Apple recently announced Apple Intelligence, its own adaptation of user-facing AI, beyond the machine learning horsepower in its devices. Google has increasingly developed AI tools, with some being consumer-facing and others further back in the stack.

MetaFacts surveyed 12,032 online adults in the US, Germany, UK, and Japan as part of its annual TUP/Technology User Profile 2024 study. Within the survey, along with detailing the smartphones they use, we have them report their purchase plans for the coming 12 months. We also assess their attitudes about AI's ability to help them be more creative, productive, or to learn new things along with many other positive and negative attitudes about AI.
We analyzed the iPhone/Android switcher market by dividing the market into 16 segments based on their current use of an iPhone or Android smartphone and their intention to acquire an iPhone or Android or not refresh their device.

Earlier issues

The connection between AI-assisted activities and home printing

American employees and AI-assisted use cases-an emerging yet complicated work relationship

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Upcoming issues

Which generations are using a Windows 11 PC with a Copilot+ key at a higher rate than other generations

Which generations are using more MacOS than Windows 11 or Windows 10 home computers? Which generations have the highest share of Windows 10 home computers?

Gen X and Boomers have higher shares of Windows 10 work computers, while Gen Z and Millennials have relatively high Mac shares

What is the profile of the highest-volume home printer users? What is the long-term trend for these page-burners?

Profile of American item tracker users and those planning to buy an Apple AirTag or Tile?

To what extent is there home printer and home PC brand loyalty?

How is Apple's long-term market penetration shifting?

What are the top smartphone activities?

How have device type penetration trends changed by market group?

Where are the technology product plans within work from home quadrants?

Please alert me when a specific issue is released

Links to selected topics covered in TUP/Technology User Profile:

Activities Age Age groups Android Apple Boomers Communication Connected devices Devices Ecosystems Employees Employment status Entertainment Game-playing Game consoles Gen X Gen Z Home PC activities Home PCs iPad iPhone Laptops Life stage Market penetration Microsoft Microsoft Windows Millennials Mobile phones Notebooks Operating systems PC activities PCs Penetration Remote workers Remote working Smartphone activities Smartphones Sociodemographics Tablets Trends Wearables Windows Work-related activities Work from home

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