

# Google survey results

n=5,000 survey of USA respondents

100% agree that  
they own a “Laptop/  
Chromebook/  
Macbook”



one  
poll.

OPIA

# Contents

<b>03</b>	<b>BACKGROUND</b>
<b>04</b>	<b>BUYING INSPIRATION</b>
<b>05</b>	<b>LOOKING FOR A REPLACEMENT</b>
<b>06</b>	<b>CHROMEBOOK VS WINDOWS</b>
<b>09</b>	<b>LAPTOP CONSIDERATIONS</b>
	FEMALE VS MALE
<b>11</b>	<b>PROMOTIONAL MECHANISMS</b>
	2-YEAR WARRANTY
<b>17</b>	<b>CHROMEBOOK USERS</b>
	OTHER OS DEVICES
	USER SATISFACTION
	FAMILY & FRIENDS
	CASH INCENTIVES



More than 3 in 4 respondents agree that a promotion offer run by retailers and/or manufacturers is likely to influence their purchasing decision

## Background



### Online (WAPI) survey

Sample 5,000 USA Adults



### Constraint

All respondents say “Yes” that they own a “Laptop/ Chromebook/ Macbook”



### Fieldwork

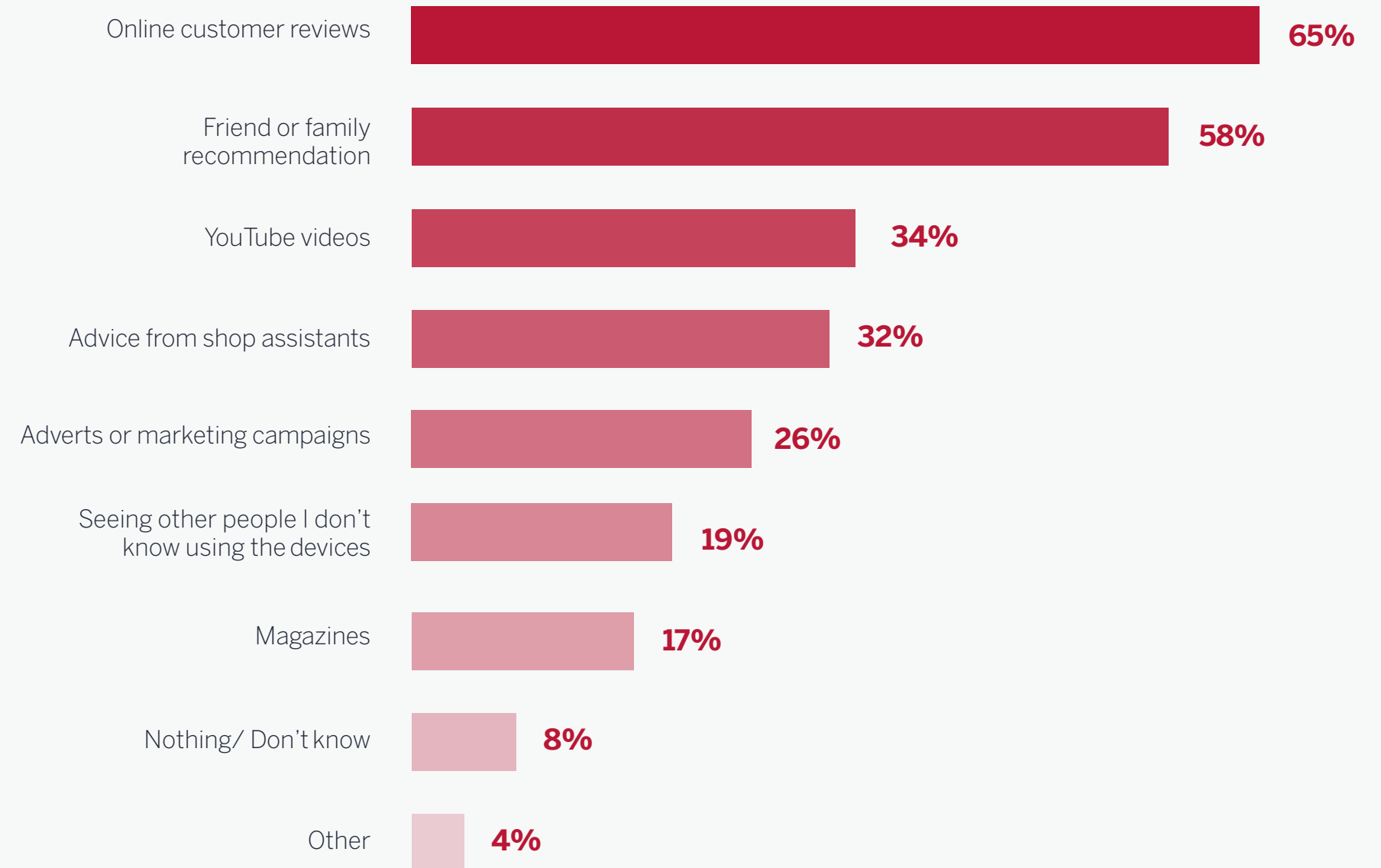
3rd December 2018 to 19th December 2018

## Wide variety of sources of laptop buying inspiration:



Customers are two times more likely to respond to a friend or family recommendation, rather than shop assistant advice or adverts

### What does/would help you make a decision to buy a laptop?\* [n=5,000]



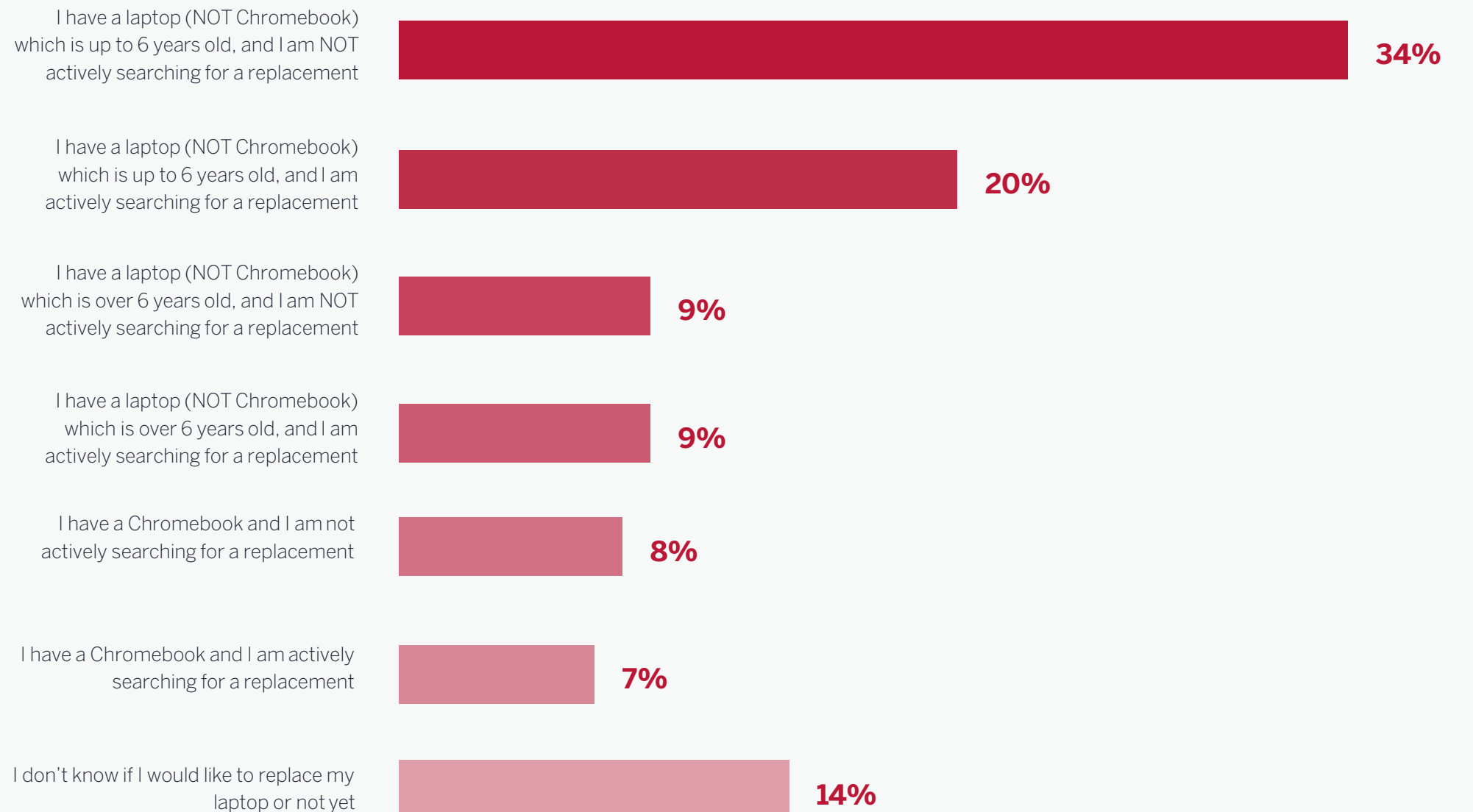
\*Please note, the percentages above add up to more than 100% as respondents could choose multiple answers.

34% that have a laptop are not looking to change it. 7% are however looking to replace a Chromebook

 36%

have a laptop or a Chromebook that they are looking to replace

Which of these customer types do you see yourself most accurately fitting? \* [n=5,000]



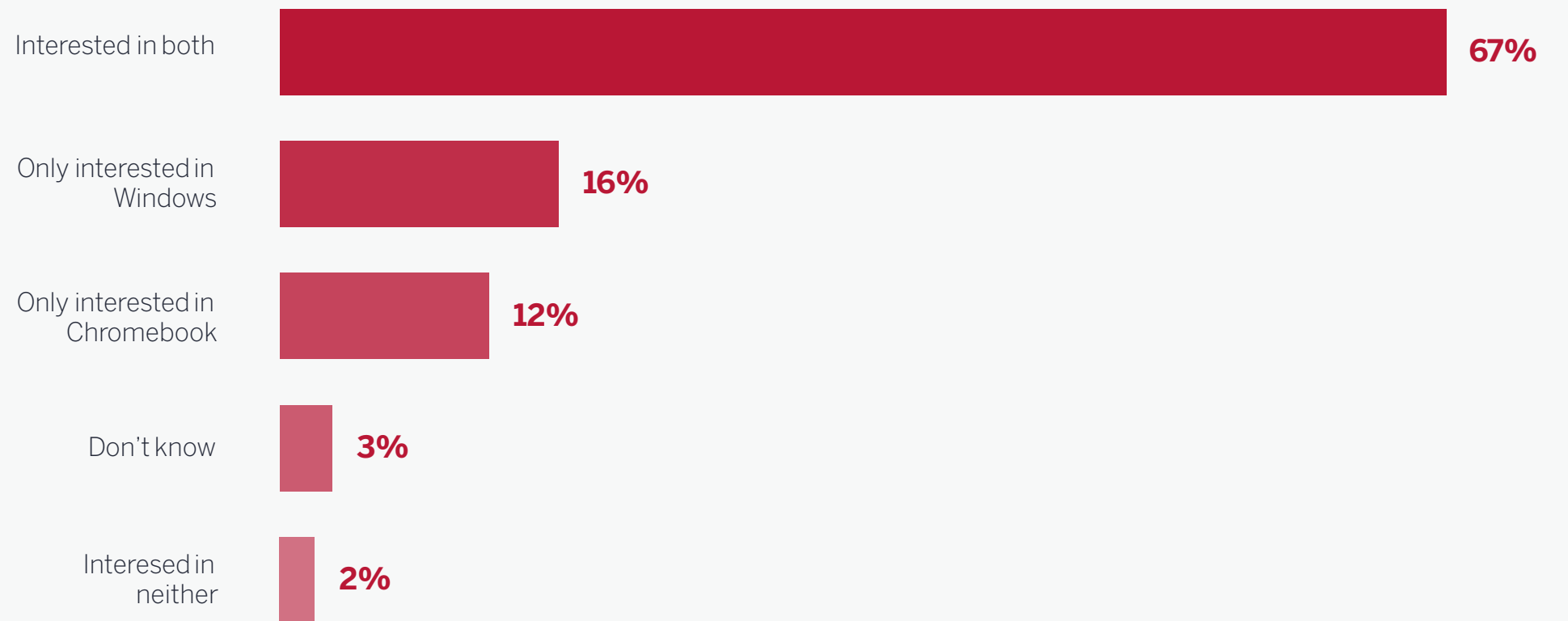
\*Please note, the percentages above add up to more than 100% as respondents could choose multiple answers.

Among the 1,436 respondents actively looking for a laptop, 67% are agnostic to whether it should be Windows or Chromebook

 79%

are interested in purchasing a Chromebook, with 12% only interested in only a Chromebook

If you are actively searching for a replacement laptop, do you think you would be interested in purchasing a Windows laptop, or are you interested in purchasing a Chromebook? [n=1,436]





77%

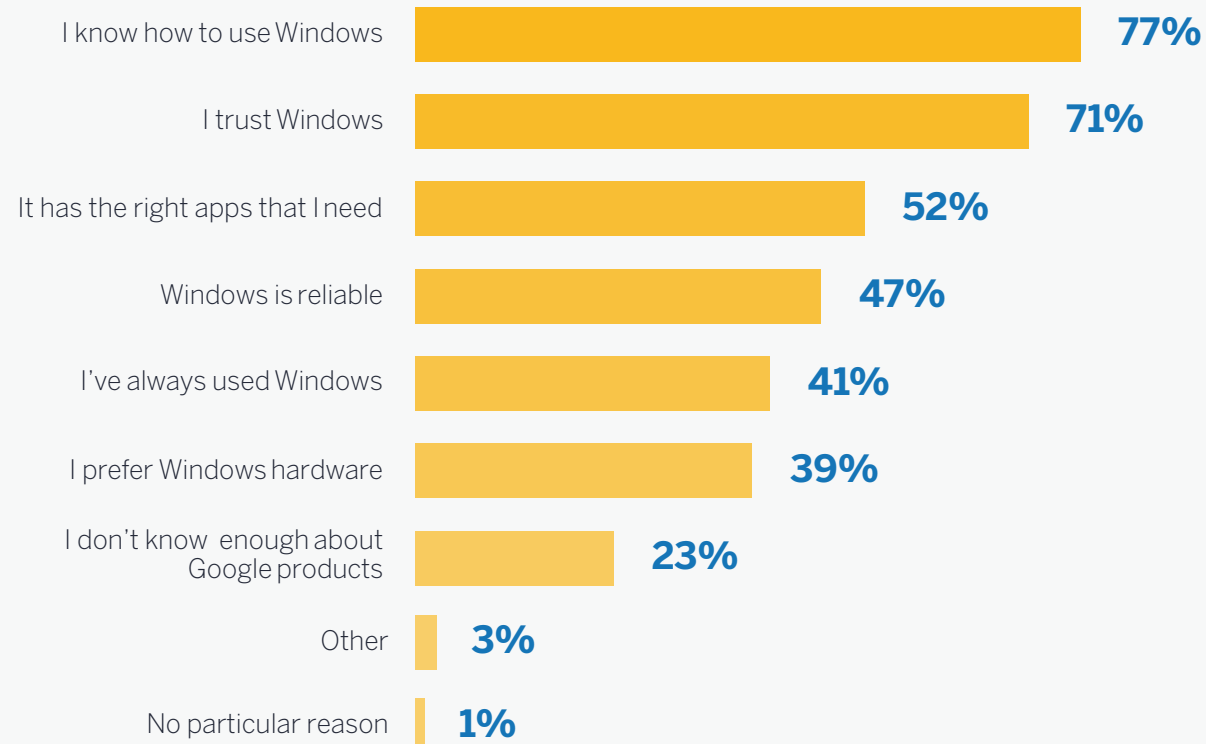
of people who would choose a Windows laptop over a Chromebook would do so due to its ergonomic familiarity



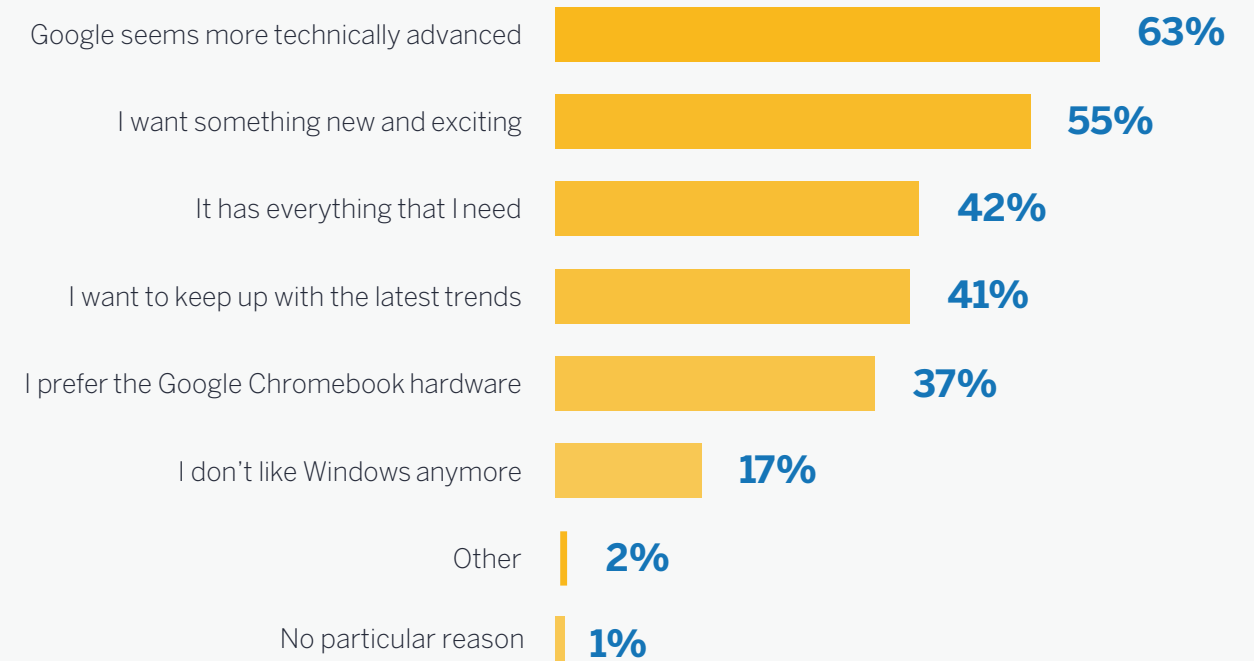
63%

of people who would choose a Chromebook over a Windows laptop would do so due to their belief that Google is more advanced

Why would you choose Windows laptop over a Chromebook?\*[n=231]



Why would you choose Chromebook over a Windows laptop?\*[n=179]



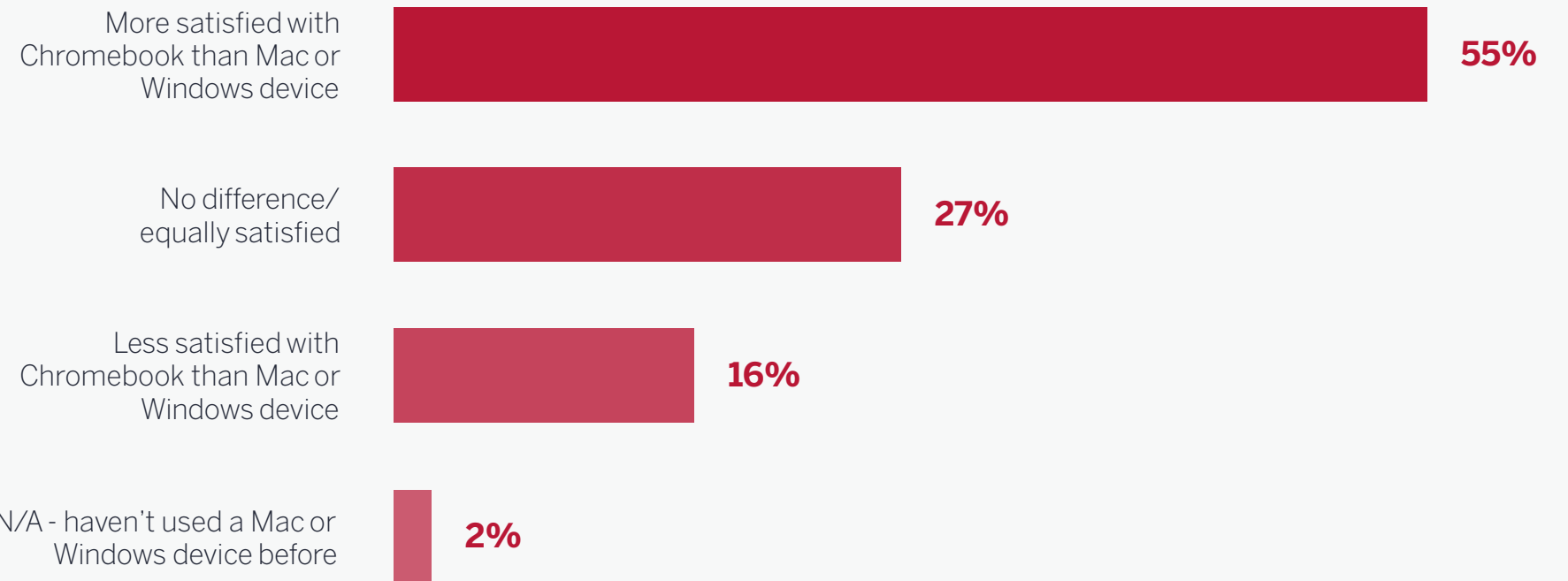
\*Please note, the percentages above add up to more than 100% as respondents could choose multiple answers.

55% of Chromebook users say they are more satisfied than they were with other OSs in the past

 82%

of people are “equally satisfied” or “more satisfied” with a Chromebook than a Mac or Windows device”

Are you MORE or LESS satisfied with your Chromebook than when you used to use a Mac or Windows device? [n=743]





## Main (stated) drivers to home laptop purchase choices:\*



**59%**  
Speed



**48%**  
Battery life



**42%**  
Reliability

## Other main considerations when choosing a new home laptop:\*

[n=5,000]



**41%**  
Storage



**22%**  
Brand



**22%**  
Data security



**17%**  
Lightweight



**11%**  
Privacy



**10%**  
Data back-up



**4%**  
Other consideration



**5%**  
No concerns/  
I don't know

\*Please note, the percentages above add up to more than 100% as respondents could choose multiple answers.

## Female considerations compared to male considerations:

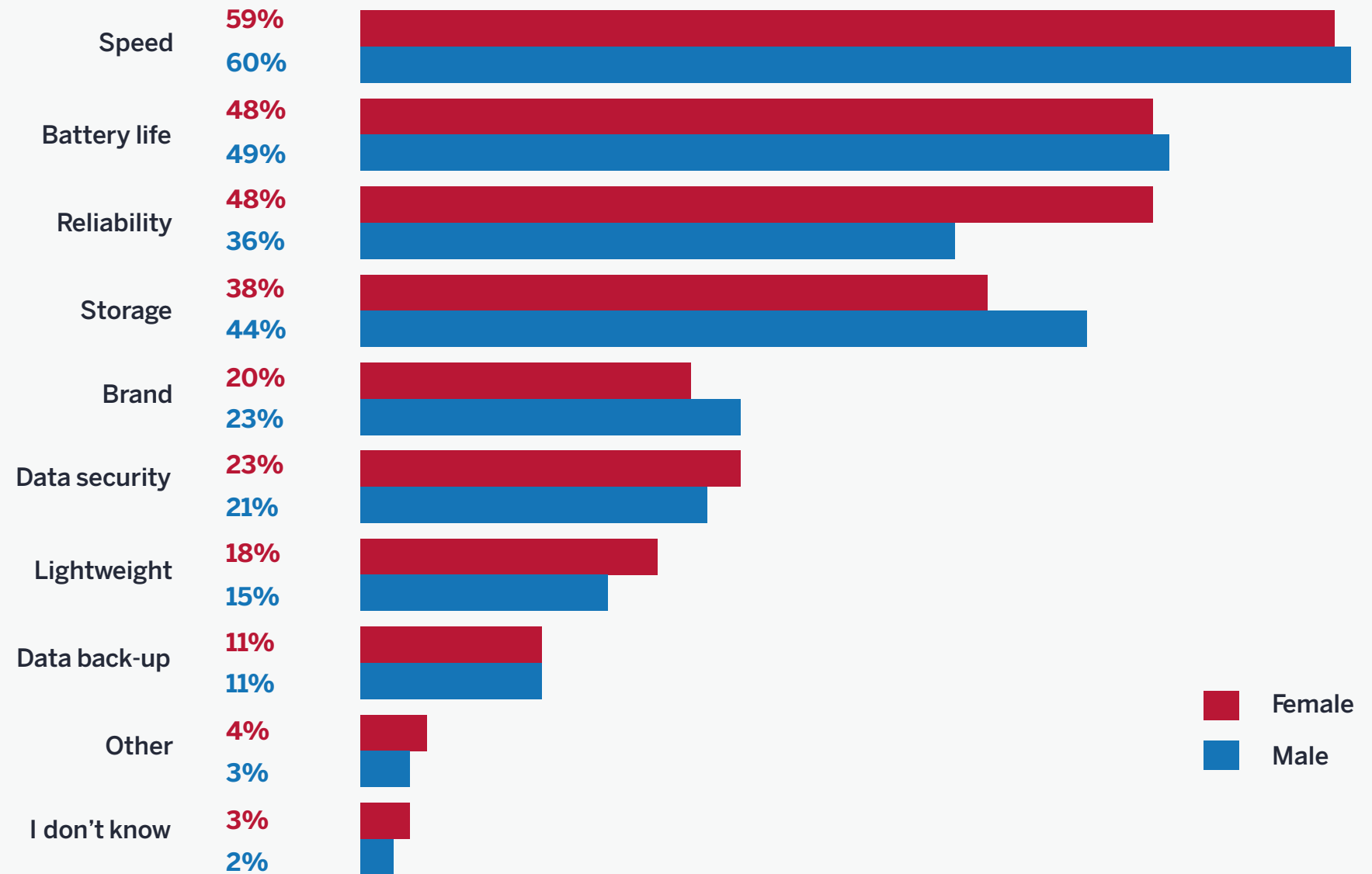


Women are significantly more interested in **Reliability** (48% cf. 36%)



Men are significantly more interested in **Storage** (44% cf. 38%)

Main considerations when choosing to get a new home laptop [n=F:2,616 & M:2,384]



\*Please note, the percentages above add up to more than 100% as respondents could choose multiple answers.

The two best promotions were:

71%

“A 2nd year warranty offer on your Chromebook, to give you peace of mind”

71%

“An extended trial offer for Chromebook purchases, giving you 90 days to try your product or return it free of charge”

Those that ARE currently searching for a replacement

	All respondents	Laptop >6y	Laptop <6y	Chromebook	I don't know if I want to replace my laptop
A 2nd year warranty offer on your Chromebook, to give you peace of mind	71%	▲ 77%	▲ 76%	71%	▼ 68%
An extended trial offer for Chromebook purchases, giving you 90 days to try your product or return it free of charge	71%	▲ 77%	▲ 76%	71%	70%
\$50 cashback when you purchase a Chromebook, fill in an online form with your details, this would be inspected and then you would be paid via a Paypal or bank transfer	70%	▲ 74%	▲ 74%	70%	▼ 67%
A \$50 trade in reward available when you purchase a Chromebook and then send back your old working device within 30 days of purchase	65%	▲ 70%	▲ 68%	69%	6.4
A \$25 cashback offer sent to you by a friend, which you could claim after you purchased a Chromebook, and your friend who sent it to you would also be rewarded too	62%	▲ 68%	▲ 65%	▲ 66%	61%

This table summarises how the different customer types react to the 6 proposed promotional mechanisms

The respondents who are searching give higher scores to all of the promotions – being ‘in market’ increases sensitivity.

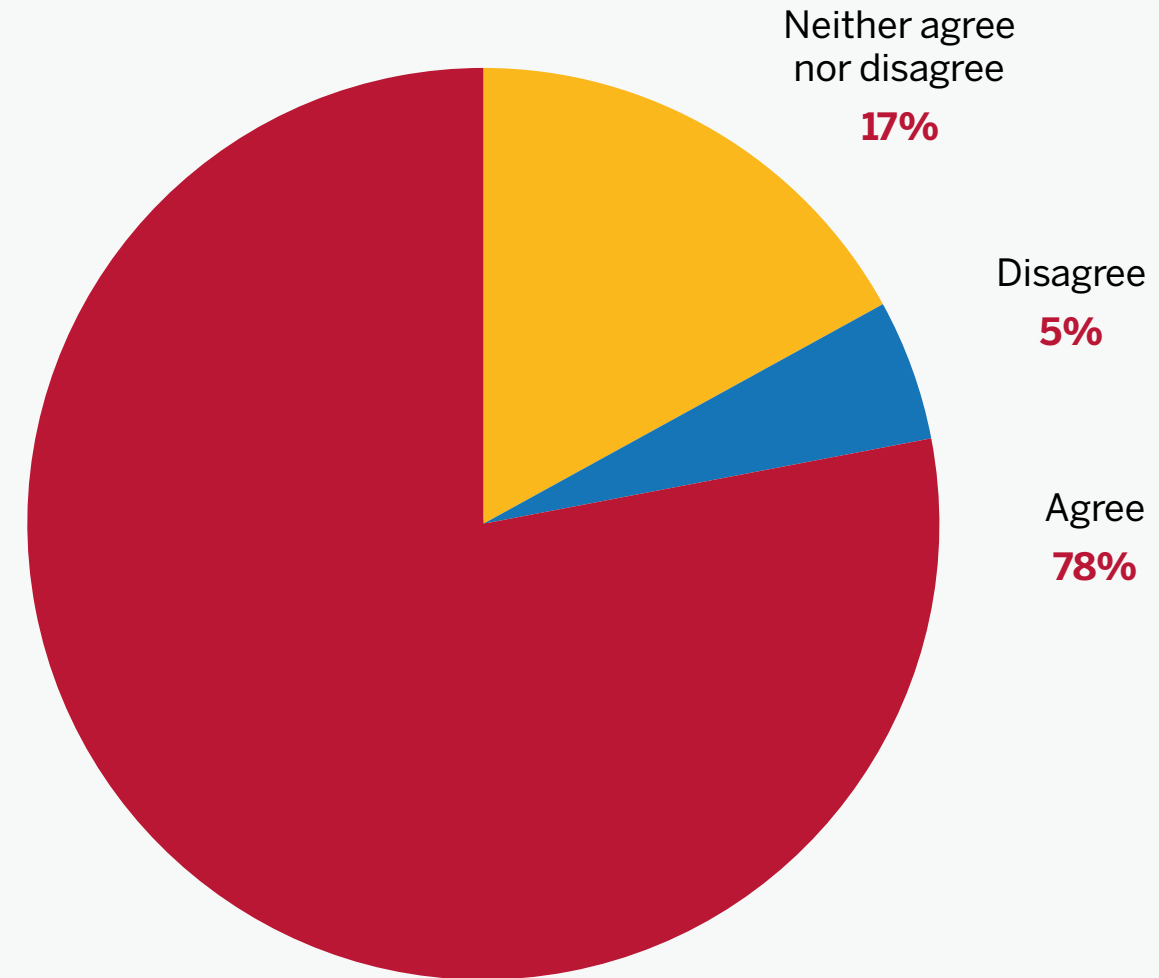
Those that **ARE NOT** currently searching for a replacement

	All respondents	Laptop >6y	Laptop <6y	Chromebook	I don't know if I want to replace my laptop
<b>A 2nd year warranty offer</b> on your Chromebook, to give you peace of mind	71%	70%	68% ▼	73%	68% ▼
<b>An extended trial offer</b> for Chromebook purchases, giving you 90 days to try your product or return it free of charge	71%	68%	68% ▼	71%	7.0%
<b>\$50 cashback</b> when you purchase a Chromebook, fill in an online form with your details, this would be inspected and then you would be paid via a Paypal or bank transfer	70%	70%	69% ▼	71%	67% ▼
<b>A \$50 trade in reward</b> available when you purchase a Chromebook and then send back your old working device within 30 days of purchase	65%	64%	62% ▼	68%	64%
<b>A \$25 cashback offer</b> sent to you by a friend, which you could claim after you purchased a Chromebook, and your friend who sent it to you would also be rewarded too	62%	61%	59% ▼	63%	61%

More than three quarters of respondents agree that “A promotion offer run by retailers and/or manufacturers is likely to influence my purchasing decision

Agree or disagree with the following statement?

‘A promotion offer run by retailers and/or manufacturers is likely to influence my purchasing decision’ [n=5,000]



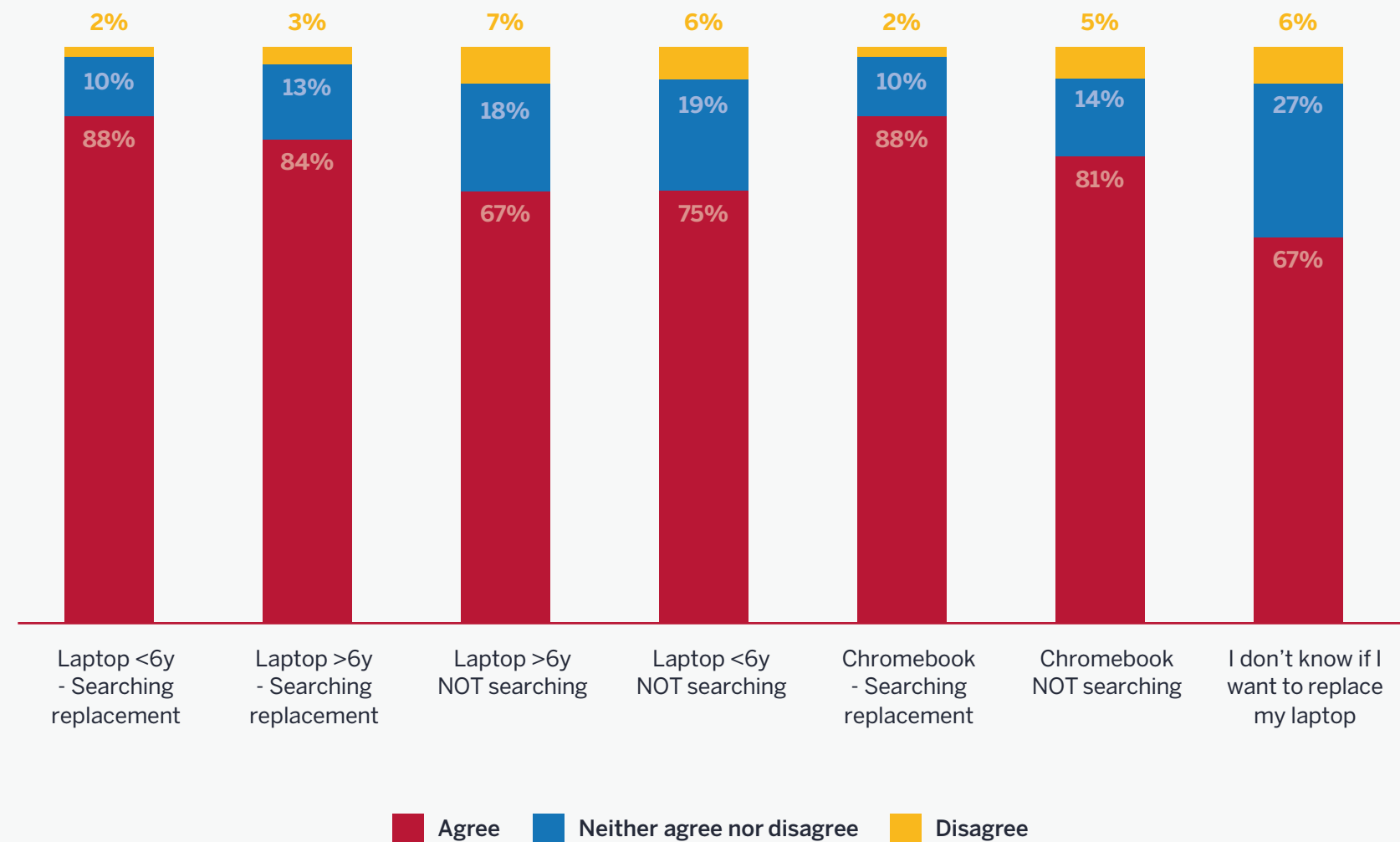
On this question also,  
we see significantly  
higher sensitivity to  
promotions among  
those respondents  
actively searching

 **88%**

with a laptop under 6 years  
old believe a manufacturer  
promotion would influence  
their purchasing decision

Agree or disagree with the following statement?

**'A promotion offer run by retailers and/or manufacturers is likely to influence my purchasing decision'** [n=5,000]



## Asked overtly how a promotion would affect them...

**2** **63%**

say that a 2nd year warranty offer on a Chromebook motivate them to buy a Chromebook over a Windows laptop

Would the following offer motivate you/motivate you more to choose a Chromebook over a Windows based laptop?

'A 2nd year warranty offer on your Chromebook' [n=4,257]



**63%**

Yes



**16%**

Don't know



**21%**

No

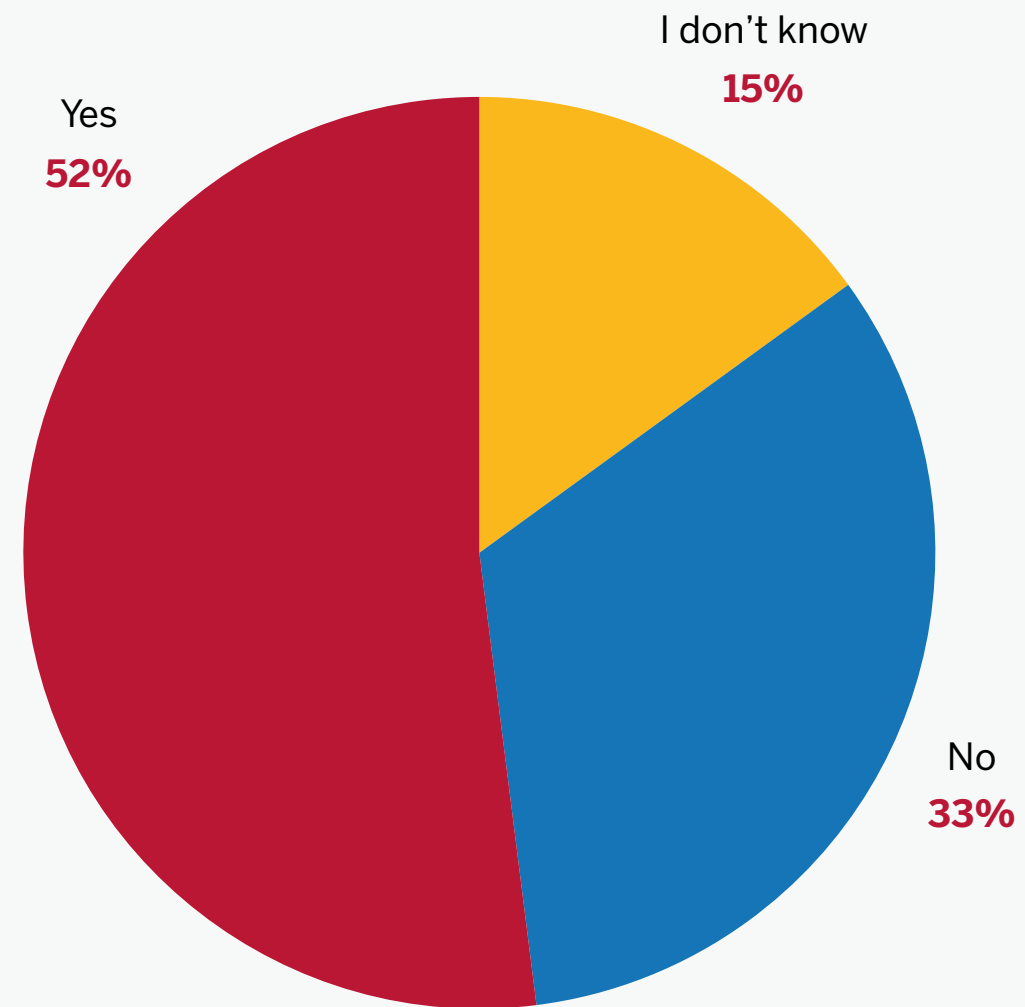
A \$50 trade in was slightly less well received, however a larger trade in reward of \$100 is likely to result in greater impact

 **52%**

would be motivated to buy a Chromebook if offered a \$50 trade in reward

Would the following offer motivate you/motivate you more to choose a Chromebook over a Windows based laptop?

'A \$50 trade in reward available' [n=4,257]







## Before your Chromebook, did you used to own/still own a Mac or Windows device? [n=726]



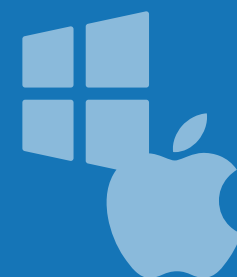
**62%**

of Chromebook users have experience of Windows



**14%**

of Chromebook users have experience of MacOS



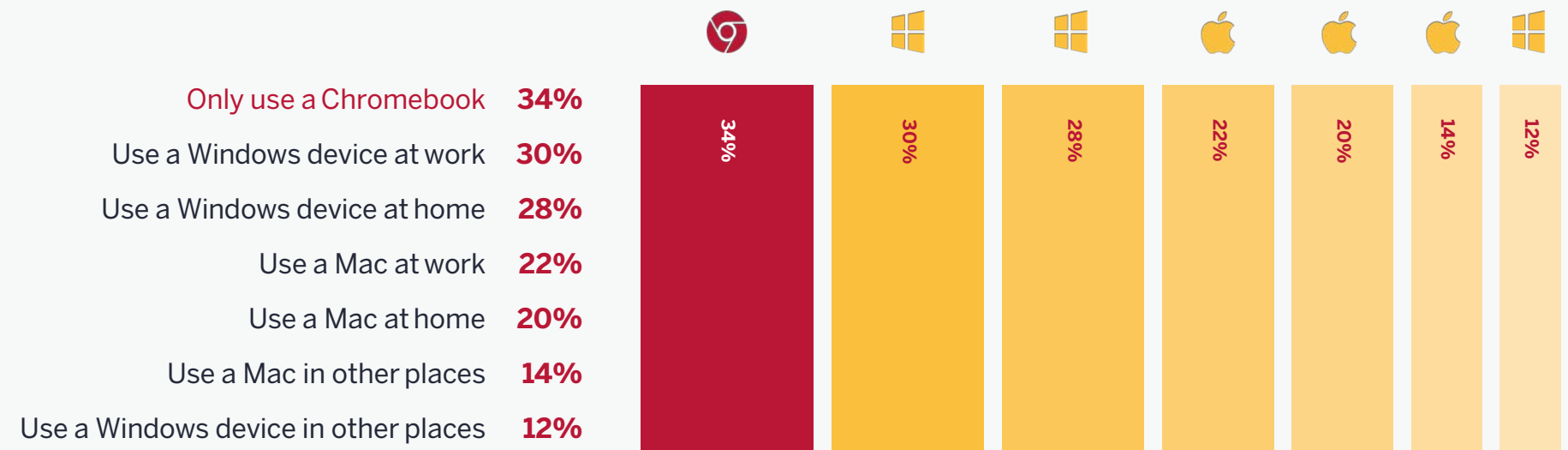
**24%**

of Chromebook users have experience of both operating systems

However; 34% of Chromebook users say they (currently) only use a Chromebook.

Do you use a Mac or Windows device elsewhere as well as your Chromebook? [n=726]

[NB: Percentages add to over 100%]



How satisfied are you with your experience in using a Chromebook [n=743]



61%

Very satisfied



36%

Somewhat satisfied



3%

Not very satisfied



1%

Not satisfied at all

 52%

of these current Chromebook users express "satisfaction"

So, not surprisingly, 81% of current Chromebook users would recommend Chromebook

Do you recommend Chromebook to your friends and family? [n=743]



81%

Yes



10%

Don't know



9%

No

An average has been calculated for each sub-group. The overall average was \$36.80

How much of a monetary incentive would it take for you to recommend Chromebook to your friends and family?

25 to 34	\$43.95
35 to 44	\$39.82
Male	\$37.64
<b>All Respondents (Average)</b>	<b>\$36.80</b>
Female	\$35.97
45 to 54	\$33.68
18 to 24	\$29.31
55 and over	\$25.76

# Thank you for your time...

If you have any questions regarding the information in this presentation please don't hesitate to contact us via the details below.

Martin Bailey  
[martin.bailey@opia-sp.com](mailto:martin.bailey@opia-sp.com)

M: +44 (0)7730 529973

W: [www.opia-sp.com](http://www.opia-sp.com)

Opia Ltd, 184 Shepherds Bush Road, London, W6 7NL



one  
poll.

OPIA