



Home Office Joins Mom and Apple Pie As American Institutions

Dan Ness, Principal Analyst, MetaFacts, November 8, 2004

Forget recipes and menu management—Americans don't keep their PCs in the kitchen. Basically, if they have one at home, they are very likely to have a home office—or make a corner of the bedroom serve that purpose. But however they're laid out, it's clear that American home offices represent a huge market. Meanwhile, road warring is a niche practice as far as home PC users are concerned. As for cybercafés, it appears that PC users are more likely to go there for the coffee.

These and other insights are derived from the latest research carried out by MetaFacts, Inc., and involved responses from 10,418 households. Respondents were asked where they used their family computer, their workplace computer, and their self-employed computer.

This is important because which room of the house home computers are used in can influence everything from their color, shape, size and overall industrial design to the peripherals and entertainment devices they might be connected to. It also helps more clearly define the market potential for wireless networks and consumer electronics that could interact to share music, video, graphics within the household yet not only within the same room.

Unsurprisingly, 98.8 percent of family PCs saw use in the home—but what's probably more interesting is that the installed base amounts to 118.9 million machines. Of these, 41.5 percent are situated in a home office, representing a staggering 56.8 million machines. As for the rest of the home PCs, 18.8 percent in the living room, 16.8 percent in the bedroom, 25 percent in some other room (den, anyone?), and only 4.5 percent in the kitchen. Data and carrots evidently just don't mix.

When examined in relationship to other factors, it appears that having a broadband internet connection in the home raised the incidence of a home office to 49 percent, mostly at the expense of the bedroom and other-room PCs. Only 33.1 percent of households with incomes under \$50,000 yearly reported using PCs in a home office. Probably because more pressing uses could be found for a given room, the presence of children in the home also kept the rate of home offices down, although not as much as income levels.

But regardless of what room it was in, the home PC tended to stay at home. Less than one percent of the respondents reported using their home PCs in a car or other transportation, or in a hotel. But the use of workplace PCs in those settings was in the 4-5 percent range. Both home and workplace PCs were used in libraries at a rate between one and two percent, and both saw less than one percent use in coffee shops and copy shops, indicating these venues are likely to remain niche uses. As for cybercafés, they don't seem to be becoming part of the landscape for PC users. The use for workplace machines in cybercafés among those using a home-owned, employer-owned or self-employment owned computer rose from .1 percent last year to .6 percent this year, but the rate for home PCs fell from .3 to .1 percent.

Publicly shared computers – such as in libraries, cybercafés, churches and kiosks – are mostly among those already with access to a computer. Based on the screener for Technology User Profile 2004 with 32,130 respondents, 25.1% of households with a user of one of these public computers don't have access

to a computer at home, their workplace or through self-employment. The majority – 74.9% - already have access elsewhere.

Incidentally, about 13.4 percent of workplace PCs saw use in the home. About half of these ended up in the home office and the rest in other rooms—although in this case the kitchen proved more popular than the bedroom. Evidently, people these days take work home in their laptops instead of their briefcases. Employers who have not come to terms with the fact need to wake up and smell the coffee—like the 2.1 percent of their machines that are being used in the kitchen.

Another 13.6 million machines were reported in use by the self-employed. Their rate of having home offices—36 percent—was a little lower than the home PC rate, but some of their workplace PCs were likely to have been in rooms that anyone else would call a home office. Interestingly, self-employed PCs saw more use on the road and in public places than home or workplace PCs, and that might represent an untapped niche for marketers.

Where Computers are Regularly Used – By Ownership

(% of Households with Computer Users)

	Home/Family PCs	Self-Employed PCs	Workplace PCs
At home - (Net)	98.8	42.7	13.4
At home - In Home Office	41.5	36.0	7.8
At home - In Living Room	18.8	4.1	3.6
At home - In Bedroom	16.8	5.0	1.6
At home - In Kitchen	4.5	2.3	2.1
At home - In Other Room	25.0	5.8	4.0
At work	4.4	63.5	92.3
Plane, Train or Car	0.9	5.9	3.7
At school	1.7	3.8	3.0
Hotel	0.9	5.0	4.6
Client location	0.4	7.3	4.4
Restaurant	0.5	3.7	0.9
Coffee Shop	0.5	1.5	0.7
Library	1.5	2.1	1.9
Copy Shop	0.4	0.6	0.4
Cybercafé	0.1		0.6
Other location	2.1	5.9	4.2

Source: MetaFacts, Inc. – Technology User Profile – 2004 Annual Edition

Background & Methodology

Factual, decision-making information like this is only found in one place, the Technology User Profile from MetaFacts. The Technology User Profile market research information service is based on extensive primary research selected and balanced to represent the American population - including technology users and non-technology users. Drawn from more than 30,000 surveys per year reporting on over 250 questions, it is the most comprehensive total market technology study available. TUPdates are brief summaries of information contained in the Technology User Profile.

Links to Source Data

Current Technology User Profile subscribers may be interested in the following links with related, more detailed or updated information:

[Location Where the PC is Regularly Used \(Total Market\)](#)

[TUP 2004 Annual Edition](#) (Excel)

[TUP 2004 Annual Edition](#) (pdf)

[Location Where the PC is Regularly Used \(Home/Family\)](#)

[TUP 2004 Annual Edition](#) (Excel)

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Other Resources

Current Technology User Profile subscribers may be interested in the following links with related, more detailed or updated information:

[Location Where the PC is Regularly Used \(Total Market\)](#)

[TUP 2003 Annual Edition](#) (Excel)

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[TUP 2002 Annual Edition](#) (Excel)

[TUP 2002 Annual Edition](#) (pdf)

[TUP 2001 Annual Edition](#) (Excel)

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