Technology Tracker

TECH TRACKER

QUARTERLY RELEASE:

Q4 2016

Ipsos Connect

QUARTERLY TRACKER - TRENDS IN INTERNET USAGE, TECH OWNERSHIP AND THE CONNECTED HOME

GB FACE TO FACE SURVEY via Ipsos MORI Capibus

LATEST WAVE

QUARTER 4 2016 (Field in November)

REPRESENTATIVE SAMPLE OF c.1000 GB ADULTS AGED 15+

AREAS COVERED

- Internet usage
- Connected home
- Social networking
- Smartphone ownership
- Tablet ownership
- Content consumption Music / games / TV / movies
- Next Generation Technologies/ Smartphones & the Purchase Journey

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HEADLINES

Internet usage

Almost 90% of GB adults claim that they have accessed the internet in the last three months. The proportion of adults using mobile phones to do this has been increasing steadily and is at 71% in Q4'16.

The top online activities remain: accessing email (81%), browsing for information on personal interest (72%), researching products and services (70%) and online shopping (67%).

Connected home

Smart TV ownership is now at nearly 3 in 10. Just under half own a tablet, with over a quarter owning an iPad.

Nearly 2 in 5 of GB adults have at least one gaming console in their household with 1 in 5 owning Micrsoft's Xbox360 or Xbox One. Nearly a quarter own ebook readers. 3D TV ownership has flatlined.

Social networking

Smartphones (40%) have overtaken PC/Laptop (38%) in terms of device used to access social media.

With a more mainstream appeal, Facebook remains the most visited social networking site (60% in Q4'16) Instagram (21%), Twitter (21%), G+(21%) and Snapchat (18%) all enjoy similar usage.

Smartphones

Smartphone ownership is now at 74%. iOS (39%) and Android (35%) penetration remains similar to previous.

Top 3 activities on smartphones: reading or sending emails (69%), visiting social networking sites (54%) and browsing websites (48%) Online banking has also climbed, now at 47%.

Tablets

Ownership of tablets remains stable at 49%. The gap between ownership of iPads and non-iPad tablets remains close (28% vs. 26%).

Top activities on tablet: reading or sending emails (63%), browsing websites (53%), online shopping (51%) and visiting social networking sites (49%).

Content consumption

Buying of games on a disc for a console has recovered since Q2 '15, with 17% doing so.

There is a steady upwards trend in consumption of TV via digital means (37%).

The Purchase Journey

Over half of people use their smartphone in their purchase journey – but this is heavily skewed to 15-34s, with 80% doing so. Less than half (40%) of 35+ do so.

35+ are also heavier users of PC/Laptop/Tablet in the purchase journey, with under 35's opting for smartphones instead.

Items purchased via smartphone differ based on gender, with significantly more males buying electricals on their smartphones than females, and vice versa with health & beauty products.

INTERNET USAGE

HOW, WHEN, WHERE

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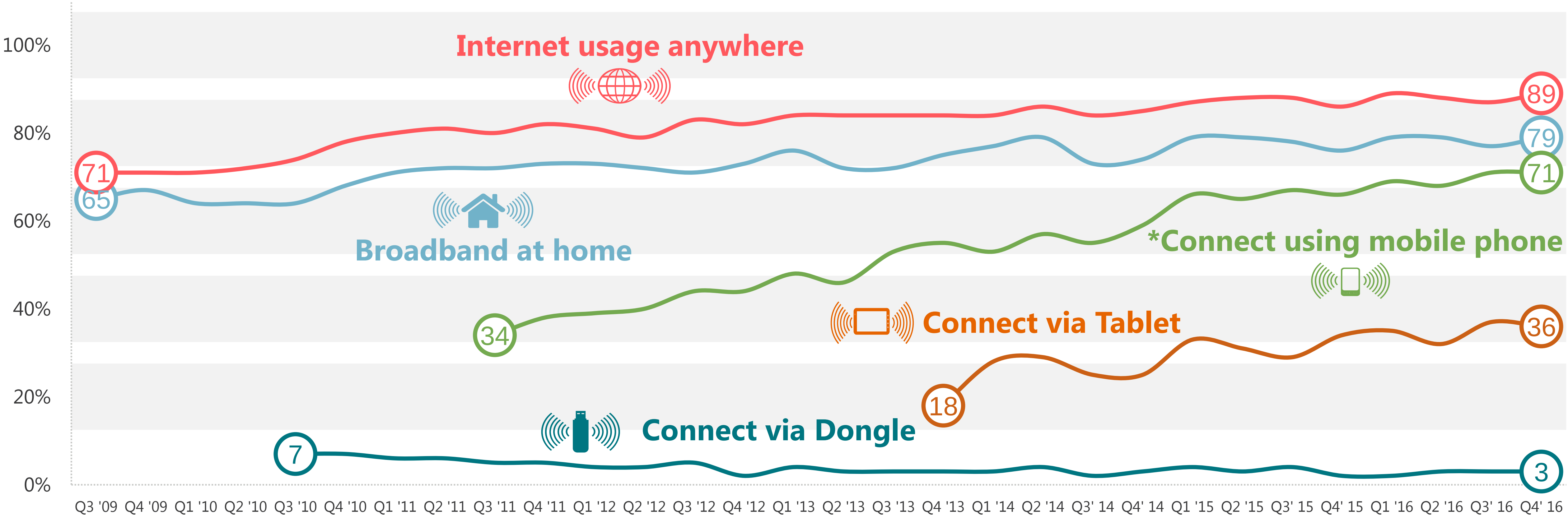
Internet usage remains stable

% HOW PEOPLE CONNECT TO THE INTERNET



* The wording used for measuring 'internet connection by mobile phone' has been updated which means earlier data is not strictly comparable and is therefore not shown

Base: circa 2,000 interviews per wave until Quarter 1 2010, circa 1000 GB adults aged 15+ per wave thereafter

Source: Ipsos MORI

Connectivity is lowest amongst 65+ C2DEs

% ACCESSING THE INTERNET BY GENDER AND SOCIAL GRADE

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	90%	99%	99%	96%	94%	86%	70%
Males AB	96%	100%	100%	99%	96%	98%	90%
Males C1	95%	99%	100%	100%	96%	94%	81%
Males C2	89%	99%	100%	95%	95%	79%	58%
Males DE	77%	99%	93%	89%	82%	69%	35%
Females	86%	99%	97%	96%	95%	86%	57%
Females AB	94%	100%	100%	100%	100%	95%	79%
Females C1	92%	100%	100%	98%	100%	93%	67%
Females C2	83%	100%	98%	98%	93%	79%	48%
Females DE	73%	97%	90%	86%	84%	73%	35%

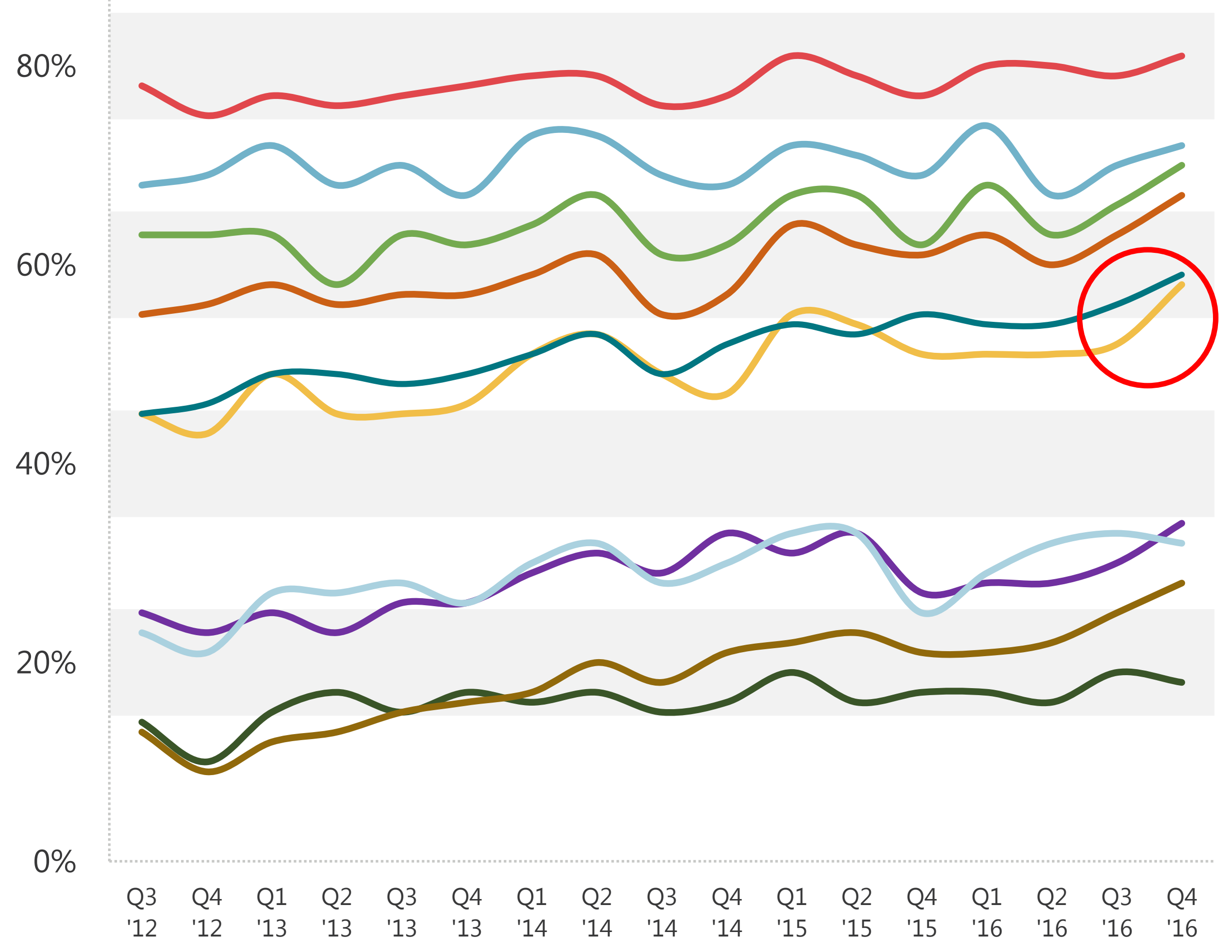
🟥 0-49% 🟧 50-79% 🟩 80-100%

Base: circa 4,000 GB adults aged 15+: Q1/ Q2/ Q3/ Q4 2016

Source: Ipsos MORI

Checking bank accounts has seen a significant rise

% USE OF THE INTERNET IN THE PAST 3 MONTHS



81%	Emails
72%	Visit sites for info personal interests
70%	Visit sites for info on products thinking of buying
67%	Visit sites to buy products online
59%	Social networking
58%	Check bank account/ other financial holdings
34%	Download/ stream music
32%	Download/ stream TV
28%	Download/ stream movies
18%	Play video games online

Not asked in Q3 2015

Base: circa 2,000 interviews per wave until Quarter 1 2010, circa 1,000 GB adults aged 15+ per wave thereafter

Source: Ipsos MORI

CONNECTED HOME

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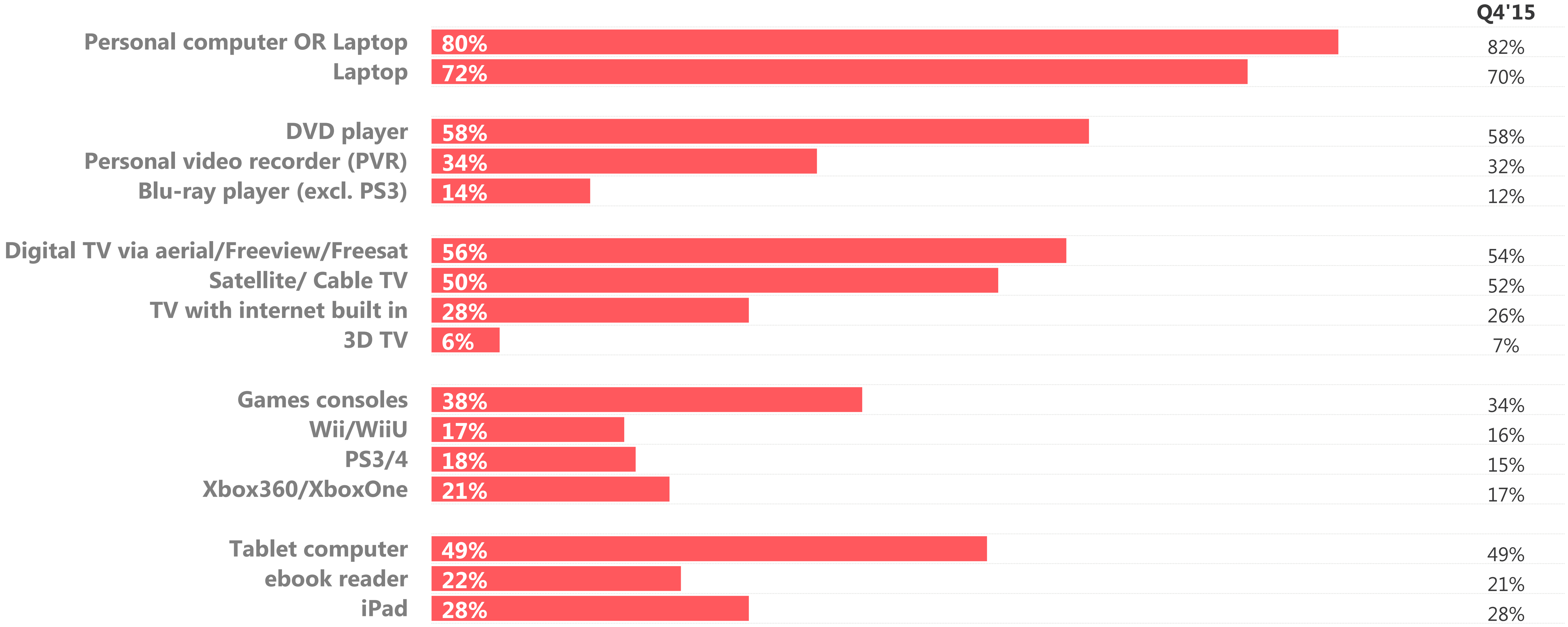
Games consoles have a steady y-o-y increase

WHICH OF THE FOLLOWING DO YOU OWN/HAVE IN YOUR HOUSEHOLD?

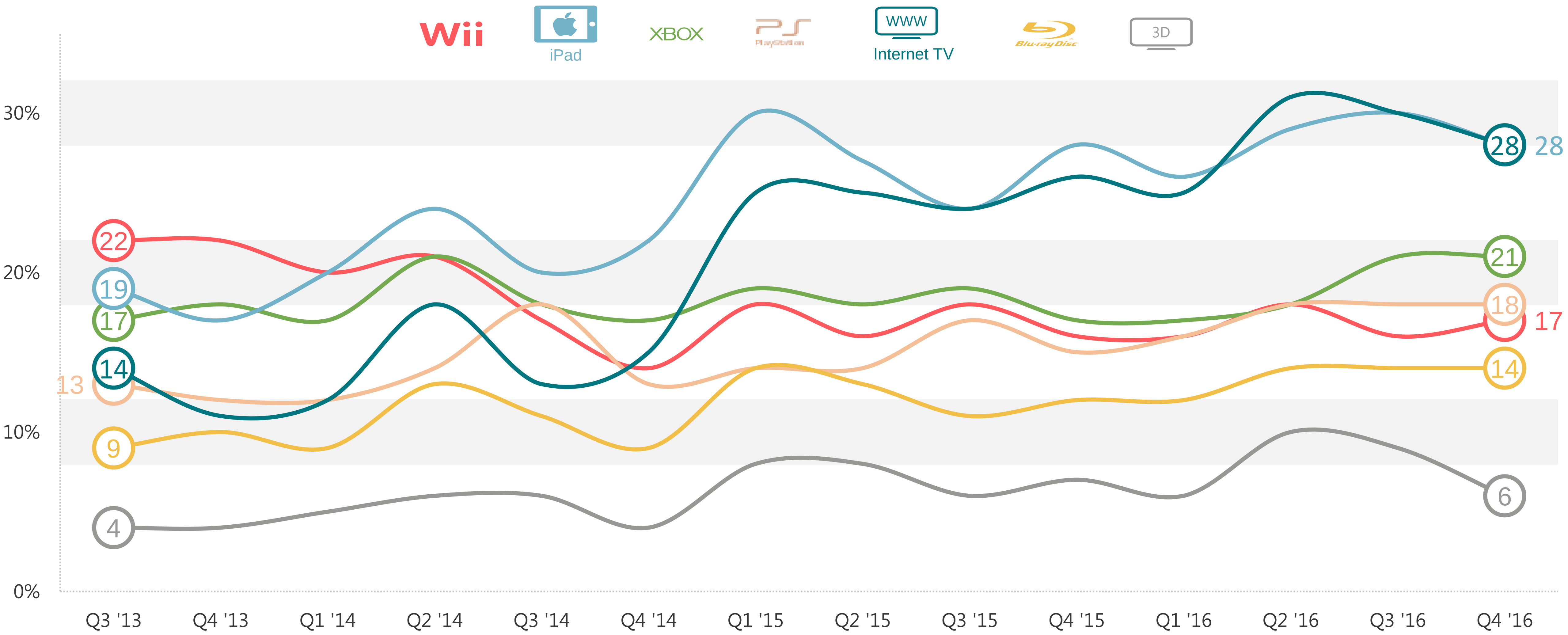


Base: circa 1,000 GB adults aged 15+: Quarter 4 2016

Source: Ipsos MORI

Internet TVs and iPads have the highest ownership

WHICH OF THE FOLLOWING DO YOU OWN/HAVE IN YOUR HOUSEHOLD?



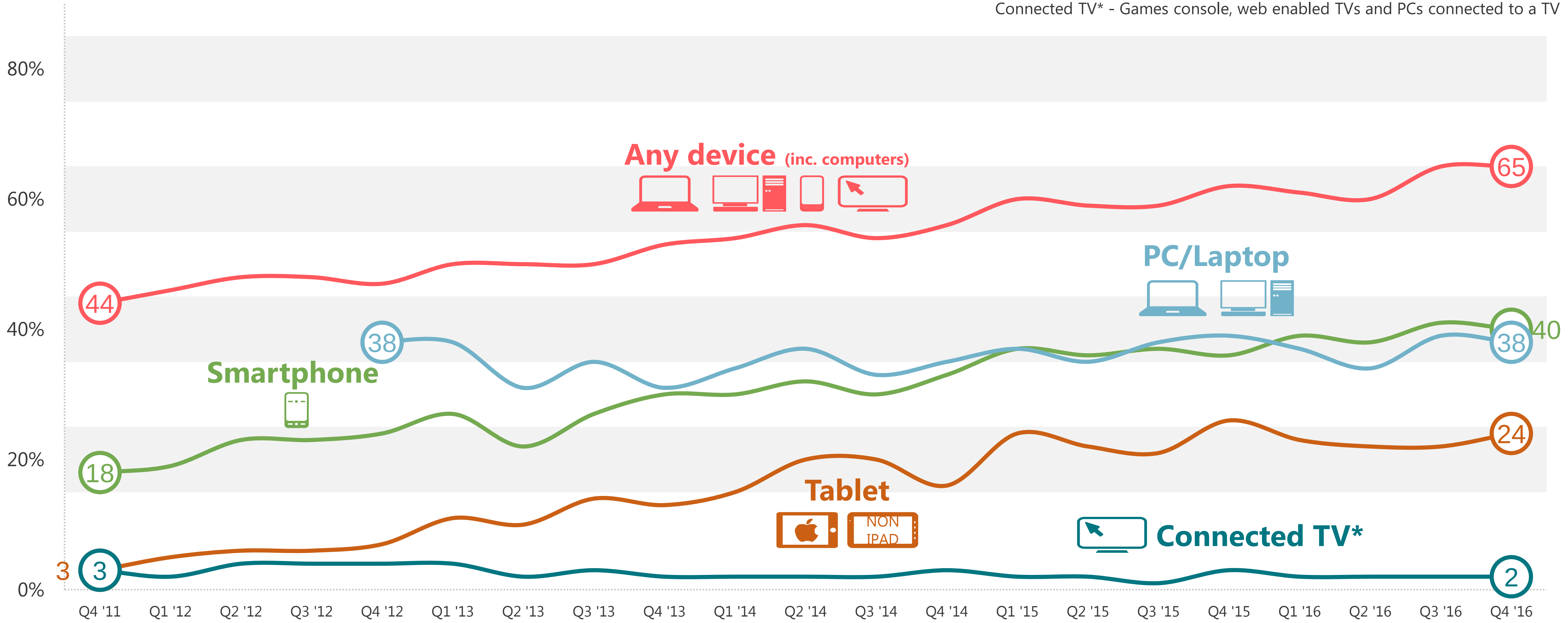
Base: circa 1,000 GB adults aged 15+ per wave

Source: Ipsos MORI

SOCIAL NETWORKING

A quarter of people access social media on tablet

% VISITING SOCIAL NETWORKING SITES

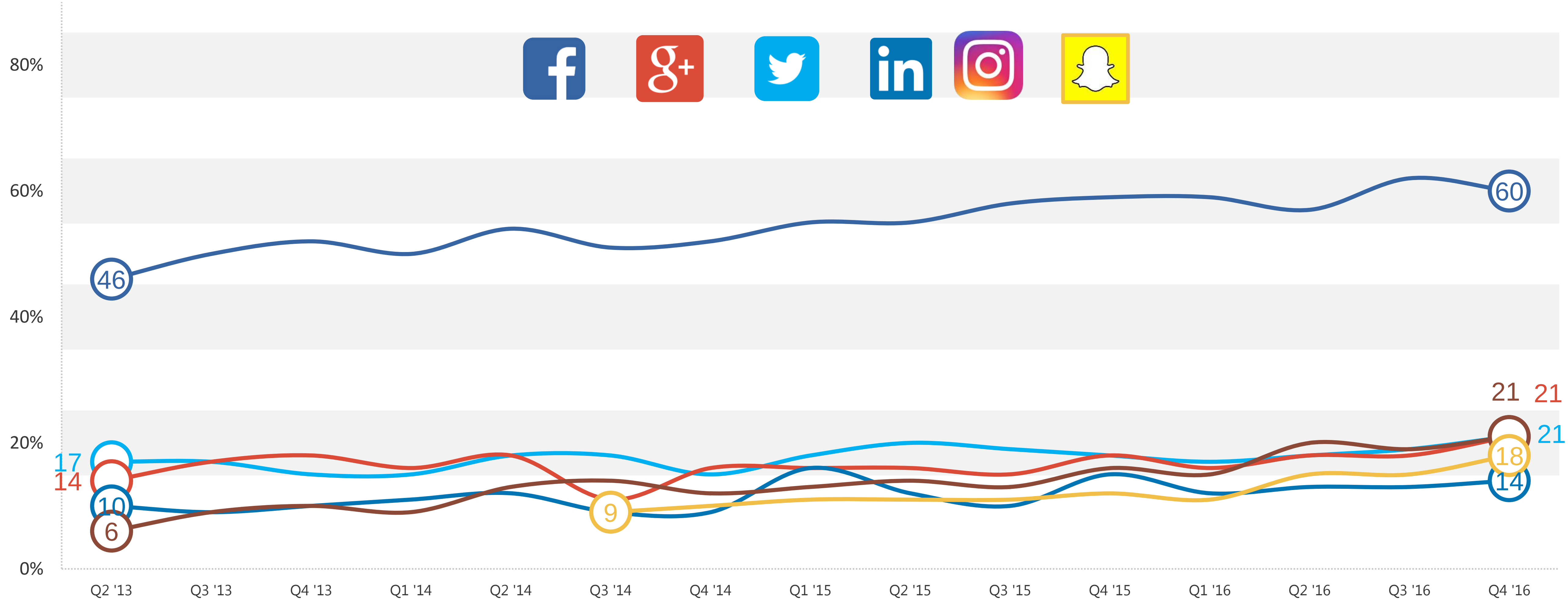


Base: circa 1,000 GB adults aged 15+ per wave

Source: Ipsos MORI

Instagram & Twitter have identical levels of usage

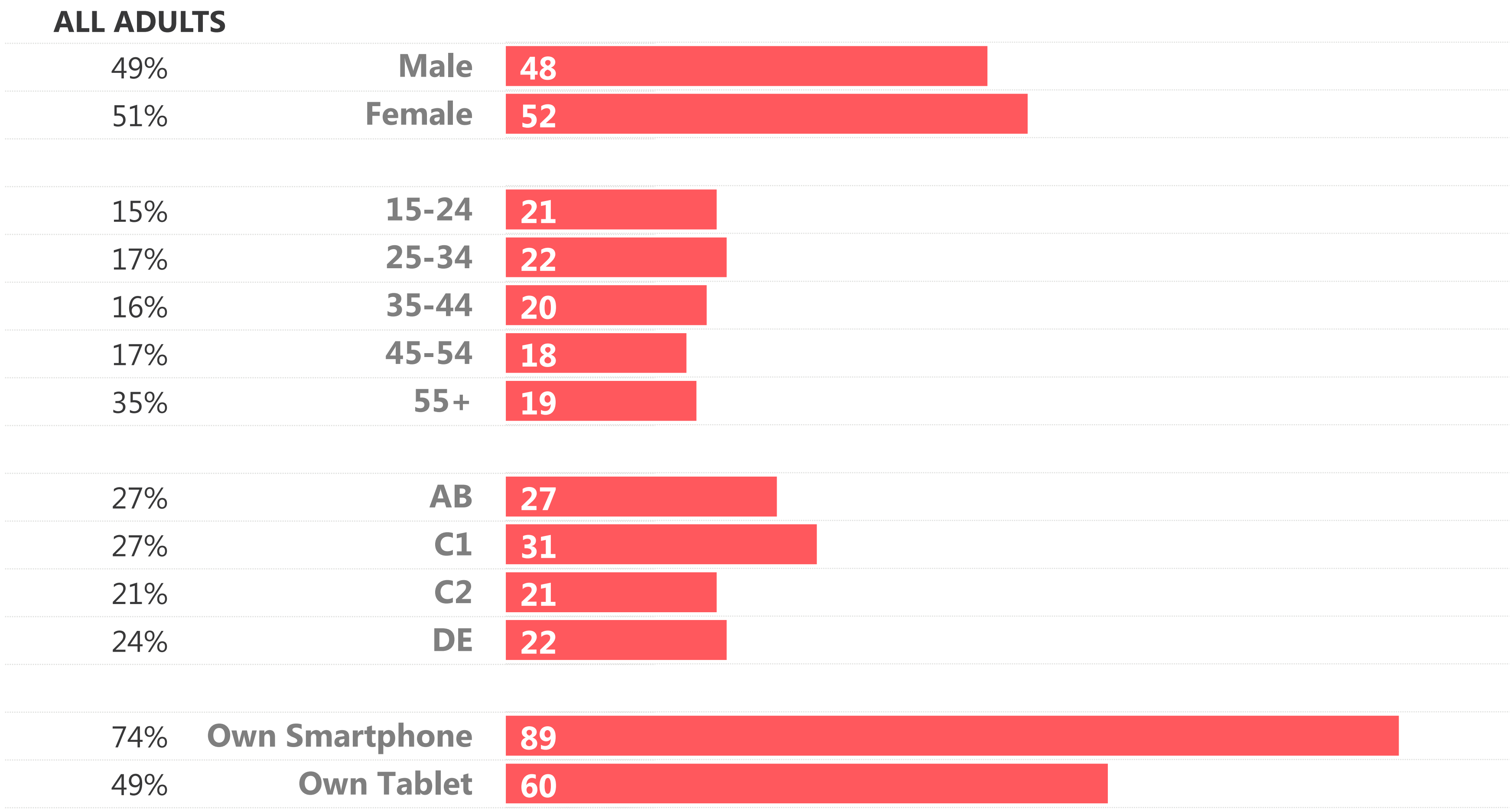
% VISITED IN LAST 3 MONTHS



Base: circa 1,000 GB adults aged 15+ per wave

Source: Ipsos MORI

Usage of Facebook is spread out equally amongst all ages



ALL ADULTS		
49%	Male	48
51%	Female	52
15%	15-24	21
17%	25-34	22
16%	35-44	20
17%	45-54	18
35%	55+	19
27%	AB	27
27%	C1	31
21%	C2	21
24%	DE	22
74%	Own Smartphone	89
49%	Own Tablet	60

The profile of Facebook users continues to be evenly spread in terms of age.

Smartphone and tablet ownership is higher amongst Facebook users in comparison to the GB adult population with 9 in 10 owning a smartphone and 3 in 5 owning a tablet.

Base: circa GB adults (1,000) / All visiting / using Facebook in last 3 months (553) Q4 2016

Source: Ipsos MORI

Facebook usage is highest amongst female

% ACCESSING FACEBOOK IN THE PAST 3 MONTHS, BY GENDER AND SOCIAL GRADE

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	57%	85%	75%	67%	58%	38%	23%
Males AB	57%	89%	83%	70%	63%	42%	30%
Males C1	61%	84%	73%	75%	60%	39%	28%
Males C2	57%	85%	70%	64%	61%	36%	15%
Males DE	51%	86%	72%	55%	41%	35%	14%
Females	62%	88%	86%	78%	63%	53%	22%
Females AB	65%	82%	92%	82%	69%	55%	30%
Females C1	66%	89%	86%	79%	66%	54%	26%
Females C2	60%	91%	85%	81%	53%	53%	20%
Females DE	56%	87%	82%	69%	59%	51%	13%

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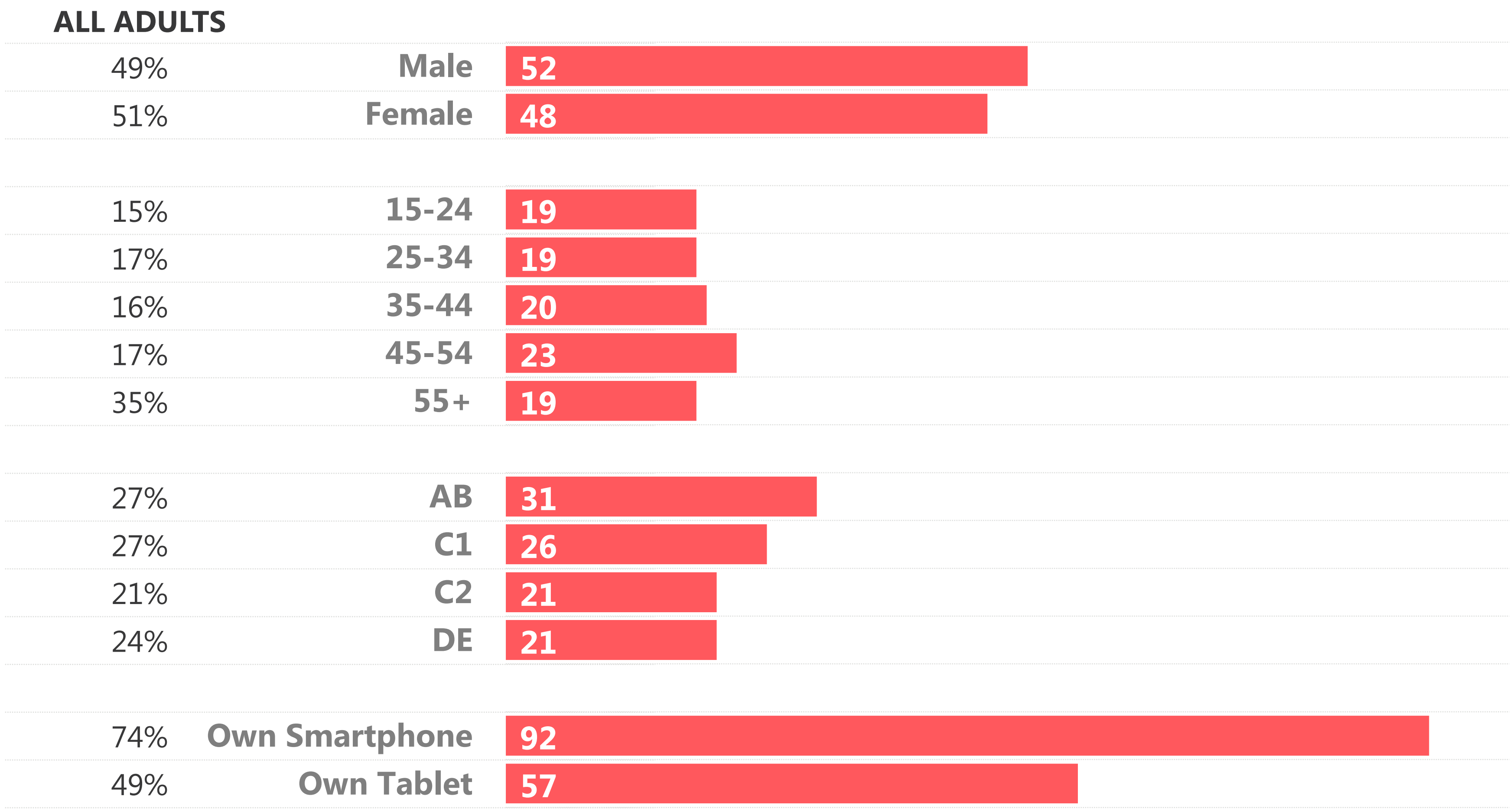
Base: circa 4,000 GB adults aged 15+: Q1/ Q2/ Q3/ Q4 2016

Source: Ipsos MORI

Google+ users are more likely to be male and AB than the GB adult population



ALL ADULTS		
49%	Male	52
51%	Female	48
15%	15-24	19
17%	25-34	19
16%	35-44	20
17%	45-54	23
35%	55+	19
27%	AB	31
27%	C1	26
21%	C2	21
24%	DE	21
74%	Own Smartphone	92
49%	Own Tablet	57

Google+ users are more likely to be male and ABs compared to the GB adult population.

Both smartphone and tablet ownership continues to be higher than the GB population. (92% for smartphones and 57% for tablets).

Base: circa GB adults (1,000) / All visiting / using Google+ in last 3 months (196) Q4 2016

Source: Ipsos MORI

Just under 1 in 5 use Google+

% ACCESSING GOOGLE+ IN THE PAST 3 MONTHS, BY GENDER AND SOCIAL GRADE

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	19%	23%	19%	24%	20%	19%	9%
Males AB	21%	15%	27%	27%	21%	28%	12%
Males C1	20%	28%	16%	22%	24%	14%	14%
Males C2	17%	18%	15%	27%	22%	17%	2%
Males DE	16%	26%	18%	19%	10%	15%	5%
Females	18%	29%	23%	21%	21%	16%	5%
Females AB	19%	23%	18%	27%	24%	20%	5%
Females C1	19%	33%	23%	20%	16%	15%	8%
Females C2	16%	25%	22%	18%	16%	15%	7%
Females DE	19%	31%	30%	17%	31%	14%	2%

🟥 0-24% 🟧 25-49% 🟩 50-100%

Base: circa 4,000 GB adults aged 15+: Q1/ Q2/ Q3/ Q4 2016

Source: Ipsos MORI

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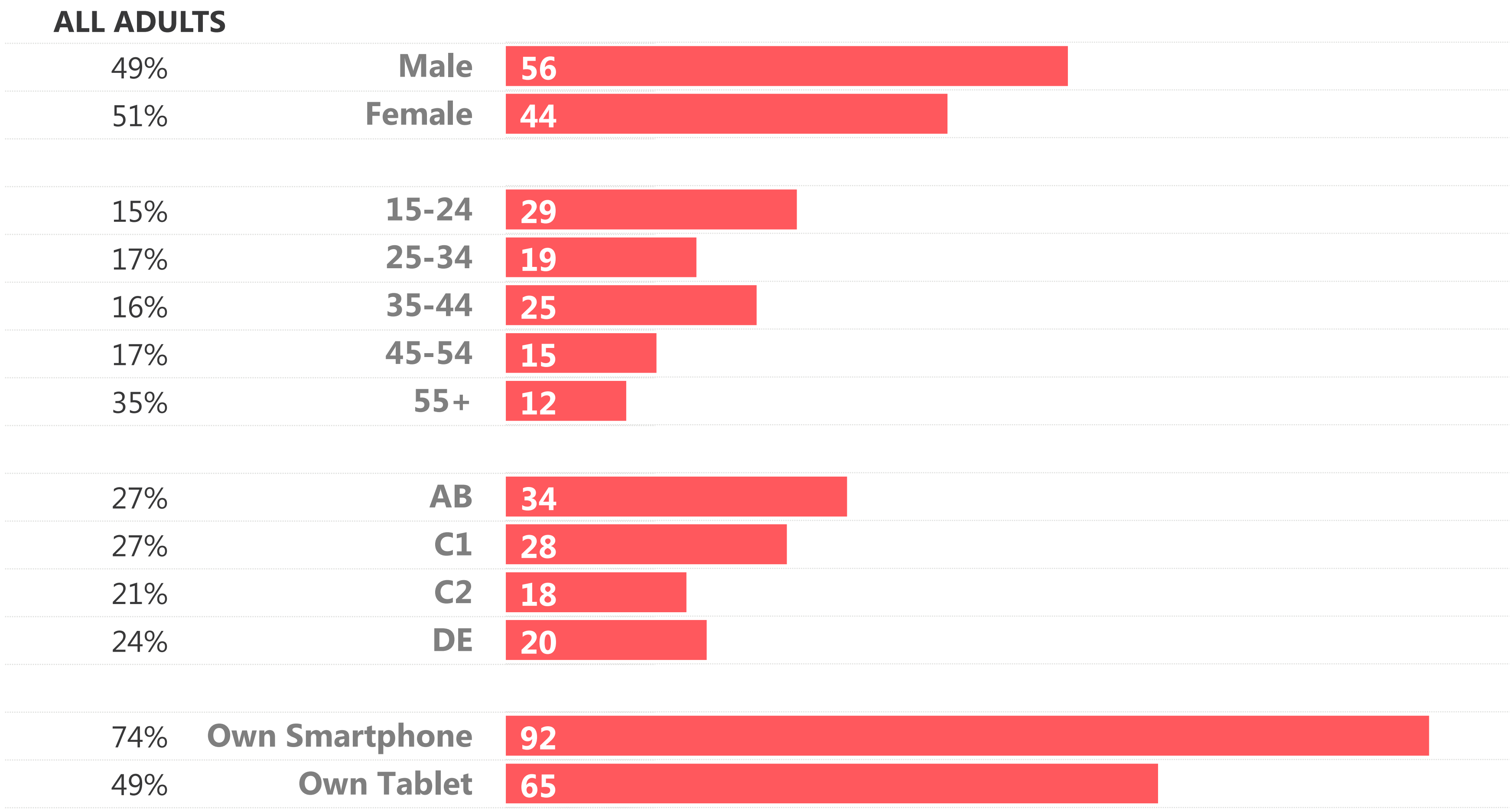
Twitter users are more likely to be young and male than the general population



Almost 2/3s of Twitter users are ABC1s.

As the preferred mode of access, it is not surprising to see higher smartphone ownership than GB ownership.

Base: circa GB adults (1,000) / All visiting / using Twitter in last 3 months (184) Q4 2016

Source: Ipsos MORI

Young AB males are the highest users of Twitter

% ACCESSING TWITTER IN THE PAST 3 MONTHS, BY GENDER AND SOCIAL GRADE

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	21%	38%	24%	32%	20%	11%	5%
Males AB	28%	55%	43%	45%	29%	20%	6%
Males C1	25%	46%	23%	38%	19%	13%	7%
Males C2	17%	32%	15%	25%	21%	4%	4%
Males DE	13%	28%	14%	17%	7%	4%	1%
Females	16%	37%	21%	21%	13%	11%	2%
Females AB	22%	46%	32%	33%	23%	16%	3%
Females C1	17%	41%	19%	20%	11%	8%	3%
Females C2	14%	36%	21%	12%	8%	13%	2%
Females DE	11%	30%	14%	13%	4%	6%	0%

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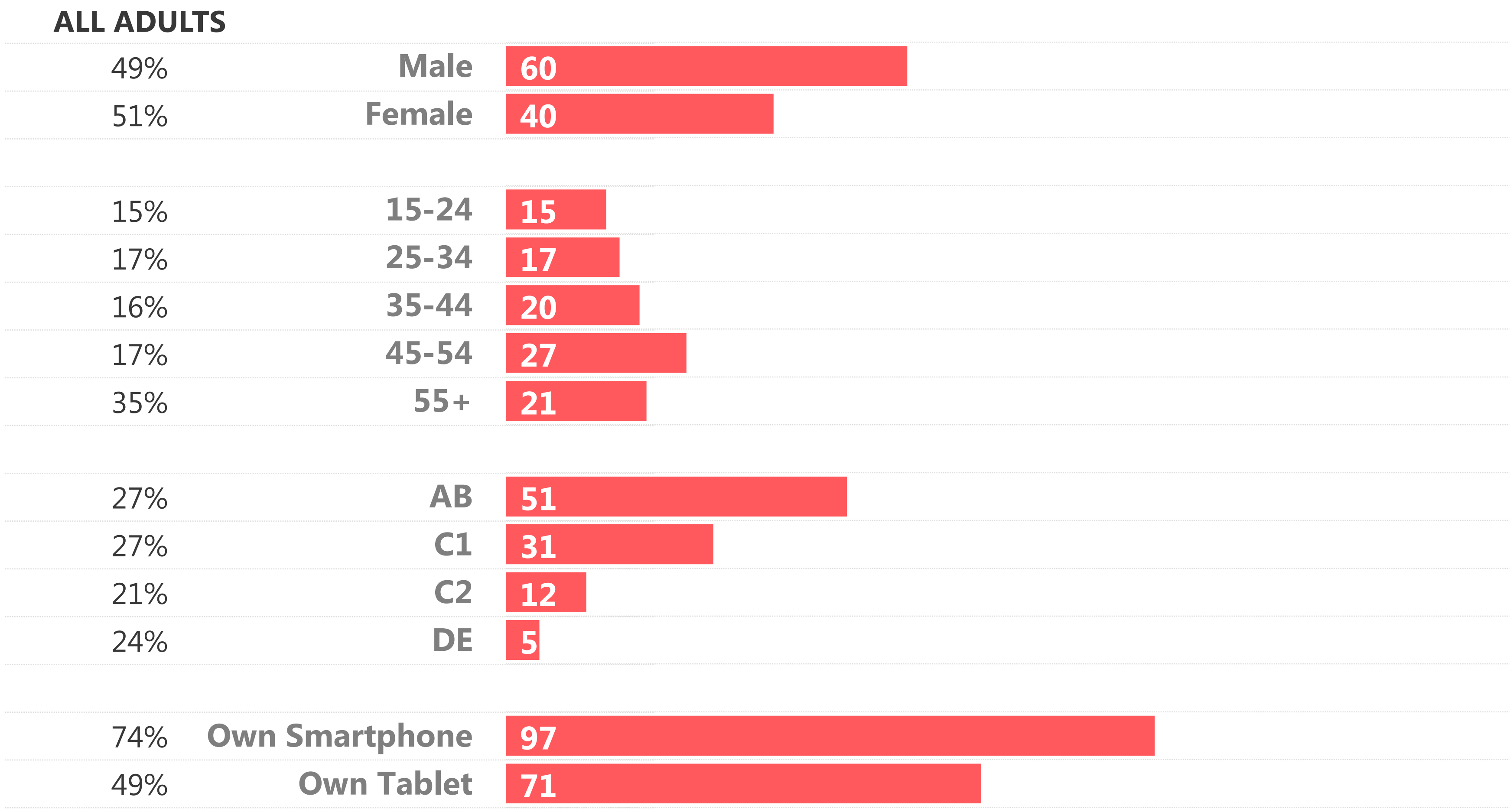
Base: circa 4,000 GB adults aged 15+: Q1/ Q2/ Q3/ Q4 2016

Source: Ipsos MORI

6 out of 10 LinkedIn users are male



As LinkedIn's targets are professionals this is reflected in their users profile. They are more likely to be male, 35+ and ABC1.

Base: circa GB adults (1,000) / All visiting / using Linkedin in last 3 months (129) Q4 2016

Source: Ipsos MORI

Usage of LinkedIn is highest amongst AB males

% ACCESSING LINKEDIN IN THE PAST 3 MONTHS, BY GENDER AND SOCIAL GRADE

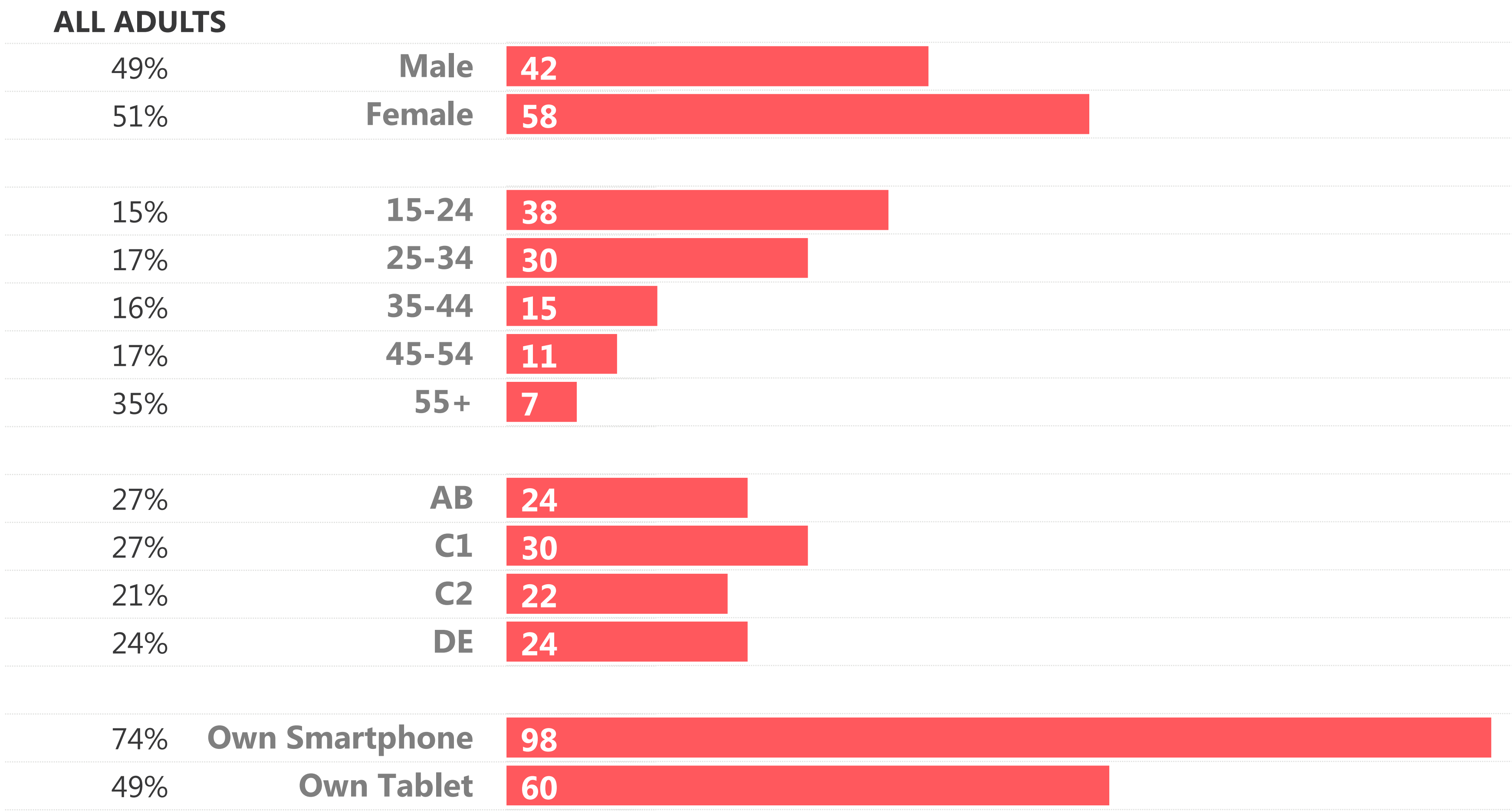
	All	15-24	25-34	35-44	45-54	55-64	65+
Males	16%	12%	17%	24%	22%	20%	7%
Males AB	31%	21%	34%	49%	37%	43%	12%
Males C1	20%	15%	22%	34%	27%	17%	5%
Males C2	6%	9%	7%	6%	9%	4%	0%
Males DE	4%	7%	0%	3%	3%	7%	3%
Females	10%	12%	13%	14%	13%	10%	2%
Females AB	20%	16%	26%	27%	25%	19%	7%
Females C1	11%	18%	17%	10%	17%	6%	0%
Females C2	6%	6%	7%	9%	3%	13%	0%
Females DE	3%	7%	2%	5%	0%	1%	0%

🟥 0-24% 🟧 25-49% 🟩 50-100%

Base: circa 4,000 GB adults aged 15+: Q1/ Q2/ Q3/ Q4 2016

Source: Ipsos MORI

Females and 15-34s use Instagram more than other demographics



Over two thirds of all Instagram users are aged 15-34, with more than half being ABC1.

Instagram's functionality lends itself to almost universal Smartphone ownership amongst its users.

Base: circa GB adults (1,000) / All visiting / using Instagram in last 3 months (183) Q4 2016

Source: Ipsos MORI

The majority of young females use Instagram

% ACCESSING INSTAGRAM IN THE PAST 3 MONTHS, BY GENDER AND SOCIAL GRADE

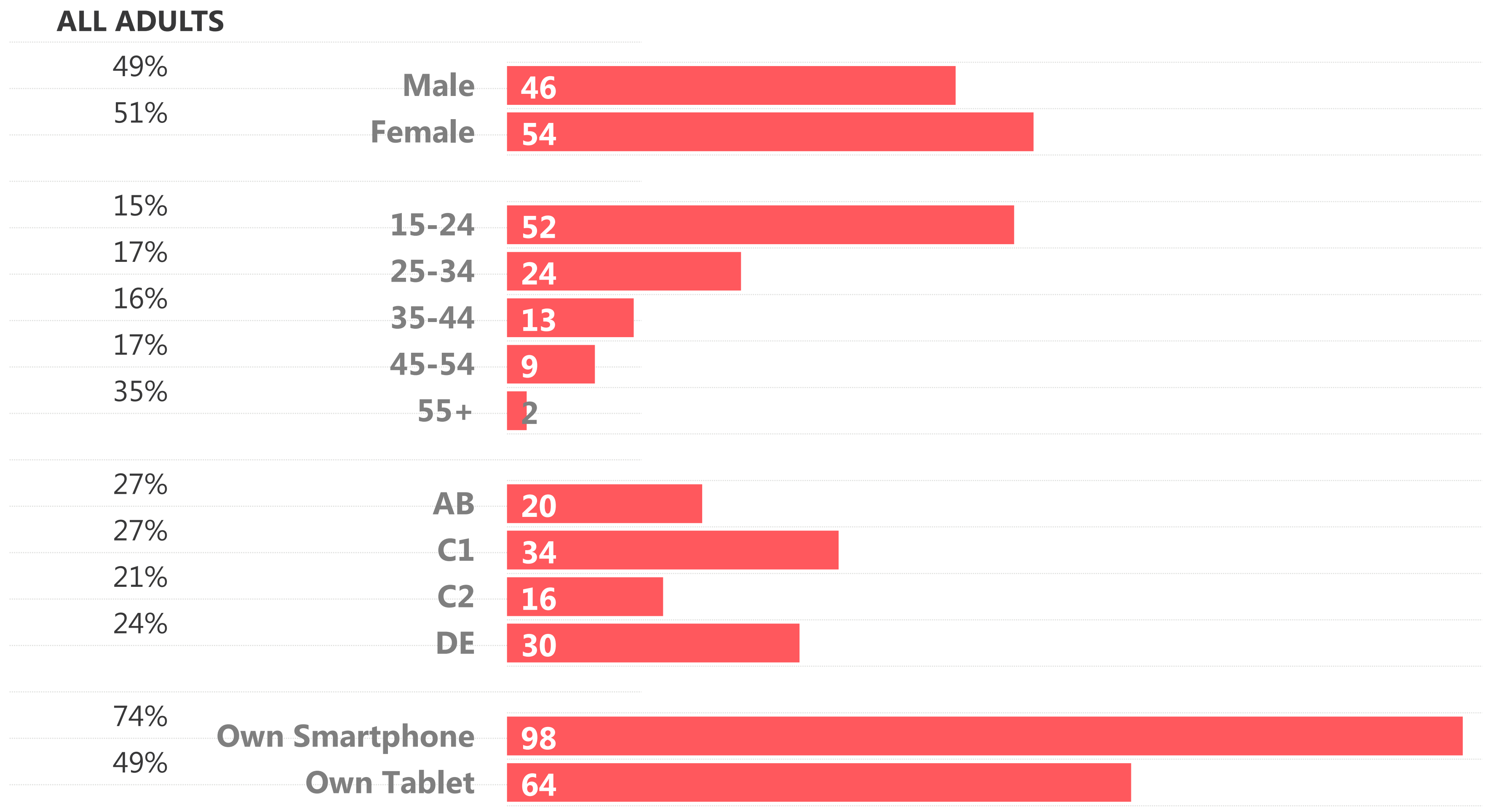
	All	15-24	25-34	35-44	45-54	55-64	65+
Males	16%	43%	28%	14%	8%	7%	2%
Males AB	16%	53%	35%	14%	12%	11%	3%
Males C1	19%	43%	28%	21%	8%	8%	2%
Males C2	17%	42%	23%	18%	7%	5%	1%
Males DE	13%	39%	25%	3%	2%	4%	0%
Females	21%	58%	35%	22%	13%	6%	1%
Females AB	22%	69%	43%	29%	18%	9%	0%
Females C1	22%	59%	37%	21%	11%	4%	2%
Females C2	19%	48%	33%	21%	10%	8%	1%
Females DE	19%	57%	27%	11%	10%	4%	1%

🟥 0-24% 🟧 25-49% 🟩 50-100%

Base: circa 4,000 GB adults aged 15+: Q1/ Q2/ Q3/ Q4 2016

Source: Ipsos MORI

Snapchat users are mainly 15-24 years old and female



ALL ADULTS		
49%	Male	46
51%	Female	54
15%	15-24	52
17%	25-34	24
16%	35-44	13
17%	45-54	9
35%	55+	2
27%	AB	20
27%	C1	34
21%	C2	16
24%	DE	30
74%	Own Smartphone	98
49%	Own Tablet	64

More than half of all Snapchat users are aged 15-24 and females. Snapchat seems more popular amongst C1 and DE social grade groups.

Snapchat functionality also leans itself to almost universal Smartphone ownership.

Base: circa GB adults (1,000) / All visiting / using Snapchat in last 3 months (152) Q4 2016

Source: Ipsos MORI

74% of 15-24 AB females use Snapchat

% ACCESSING SNAPCHAT IN THE PAST 3 MONTHS, BY GENDER AND SOCIAL GRADE

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	13%	47%	20%	7%	6%	3%	0%
Males AB	12%	56%	32%	2%	8%	4%	0%
Males C1	17%	55%	20%	10%	5%	3%	1%
Males C2	12%	36%	15%	6%	6%	2%	1%
Males DE	13%	44%	11%	11%	2%	1%	0%
Females	16%	61%	27%	8%	7%	2%	1%
Females AB	15%	74%	29%	10%	10%	3%	0%
Females C1	18%	68%	28%	5%	4%	3%	1%
Females C2	14%	43%	30%	12%	2%	0%	0%
Females DE	18%	59%	23%	8%	13%	1%	1%

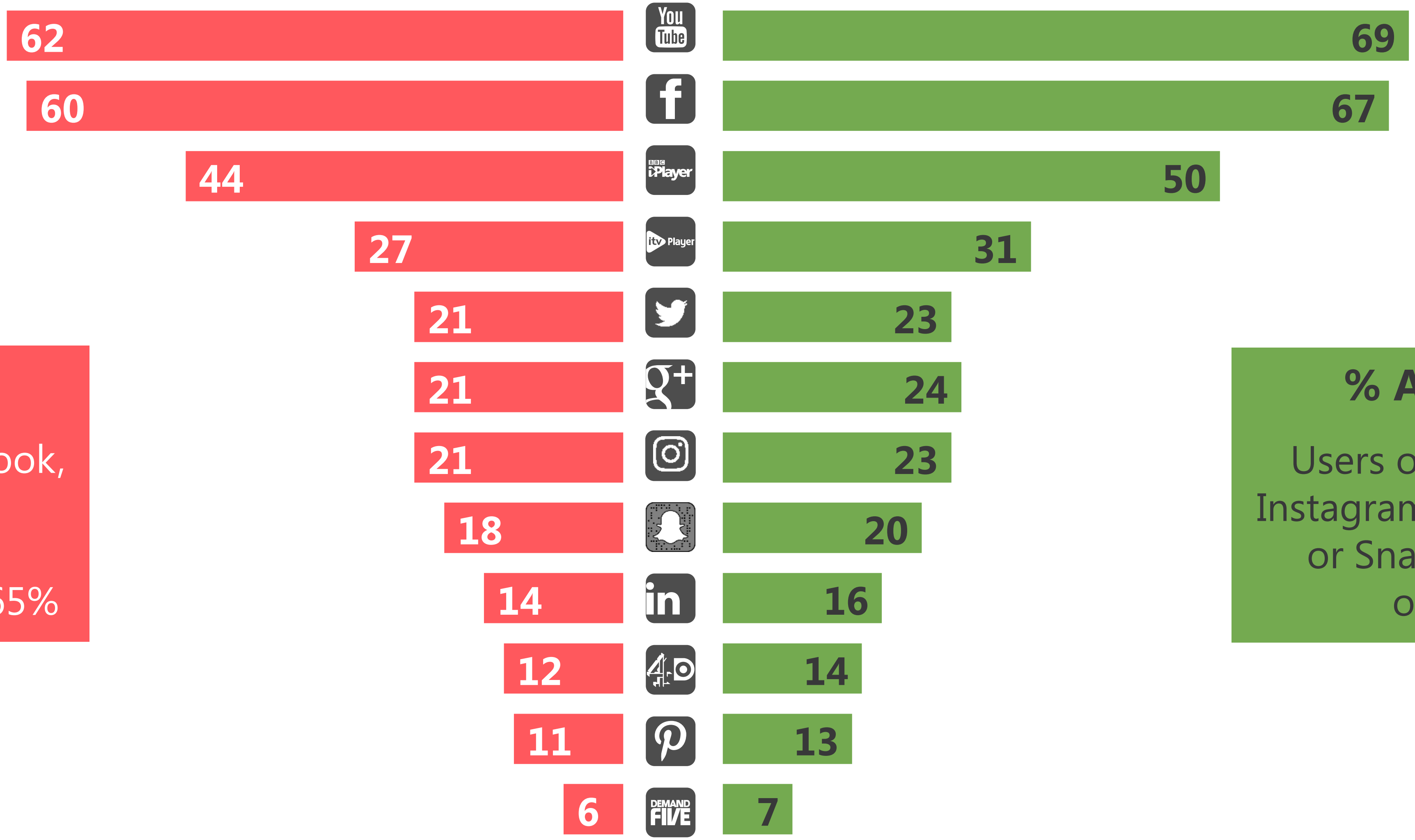
🟥 0-24% 🟧 25-49% 🟩 50-100%

Base: circa 4,000 GB adults aged 15+: Q1/ Q2/ Q3/ Q4 2016

Source: Ipsos MORI

YouTube and Facebook are the most visited sites

% VISITED IN LAST 3 MONTHS



% All adults

Users of either Facebook, Instagram, Twitter, Linkedin or Snapchat amongst all adults - 65%

% All online adults

Users of either Facebook, Instagram, Twitter, Linkedin or Snapchat amongst all online adults - 73%

Base: circa GB adults 1,000 adults aged 15+: Q4 2016

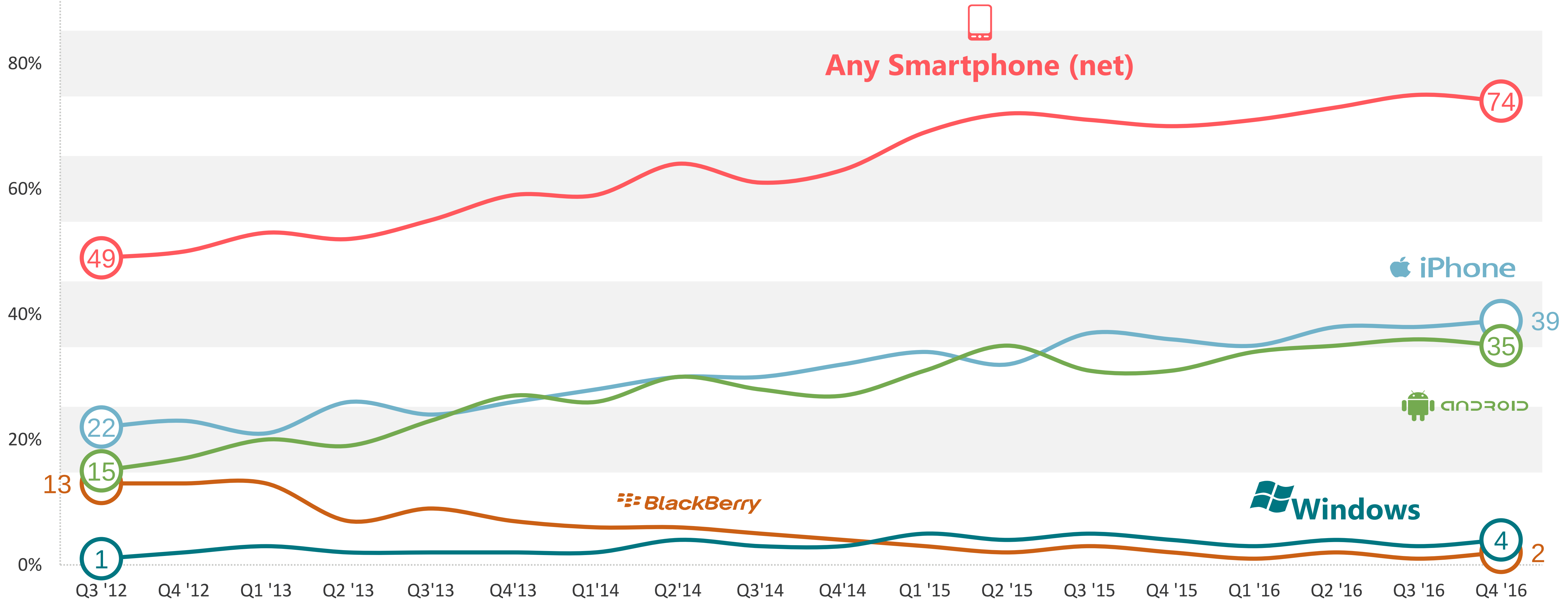
Base: 857 GB online adults aged 15+: Q4 2016

Source: Ipsos MORI

SMARTPHONE OWNERSHIP

Three quarters of people own a smartphone

% OWN by MANUFACTURER



Base: circa 1,000 GB adults aged 15+ per wave

Source: Ipsos MORI

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Smartphone ownership is lowest amongst 65+'s

% OWN A SMARTPHONE BY GENDER AND SOCIAL GRADE

	All%	15-24%	25-34%	35-44%	45-54%	55-64%	65+%
Males%	75%	95%	94%	88%	81%	65%	37%
Males AB%	79%	99%	98%	92%	86%	76%	52%
Males C1%	82%	95%	97%	92%	85%	71%	44%
Males C2%	74%	96%	91%	88%	82%	57%	22%
Males DE%	65%	92%	91%	80%	64%	51%	14%
Females%	71%	97%	93%	91%	83%	57%	27%
Females AB%	77%	100%	100%	98%	91%	71%	31%
Females C1%	76%	98%	94%	89%	83%	61%	36%
Females C2%	70%	93%	93%	89%	78%	59%	27%
Females DE%	61%	95%	85%	82%	74%	37%	16%

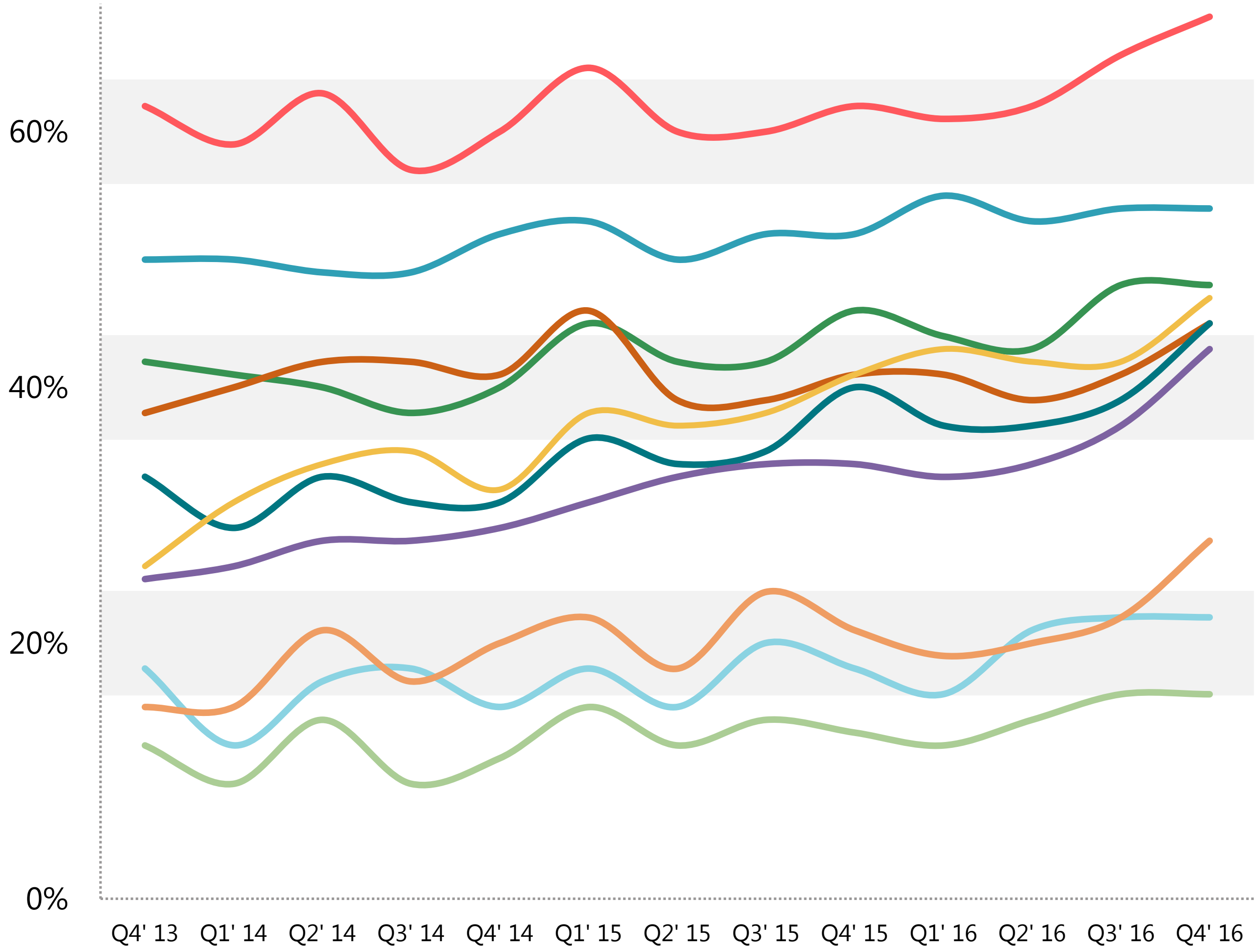
🟥 0-24% 🟧 25-49% 🟩 50-100%

Base: circa 4,000 GB adults aged 15+: Q1/ Q2/ Q3/ Q4 2016

Source: Ipsos MORI

Streaming music & shopping has the highest increase

USE OF SMARTPHONE IN THE PAST 3 MONTHS



69% Read or send emails

54% Visit social networking sites

48% Browse websites for personal interests

47% Online banking

45% Download apps for free

45% Watch video clips on sites such as Youtube

43% Online shopping

28% Download/ stream music over the internet

22% Use instant messaging services such as BBM

16% Watch catch-up TV

Base: circa 500-750 smartphone owners per wave

Source: Ipsos MORI

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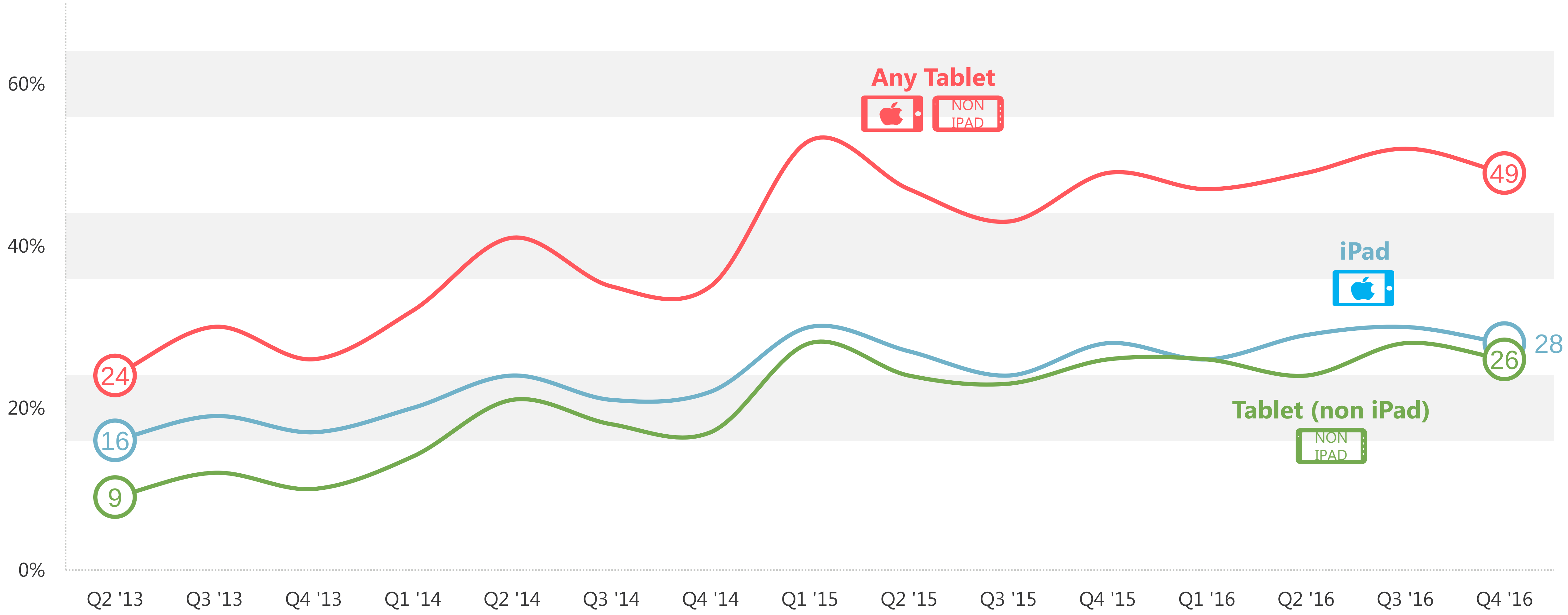
TABLET OWNERSHIP

Almost half of the GB population own a tablet

% OWN A TABLET IN THE HOUSEHOLD

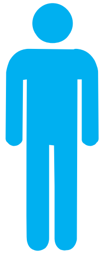


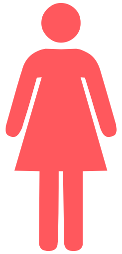
Base: circa 1,000 GB adults aged 15+ per wave

Source: Ipsos MORI

45-54 females are most likely to own a tablet

% OWN A TABLET BY GENDER AND SOCIAL GRADE ACROSS





	All	15-24	25-34	35-44	45-54	55-64	65+
Males	49%	44%	55%	56%	57%	49%	38%
Males AB	63%	55%	76%	65%	74%	65%	47%
Males C1	52%	43%	57%	65%	52%	54%	41%
Males C2	46%	39%	49%	49%	58%	41%	37%
Males DE	33%	42%	33%	44%	31%	32%	18%
Females	49%	56%	55%	56%	58%	48%	30%
Females AB	61%	73%	64%	65%	71%	56%	47%
Females C1	52%	57%	49%	61%	63%	54%	33%
Females C2	43%	44%	60%	51%	48%	42%	23%
Females DE	38%	54%	47%	36%	42%	36%	19%

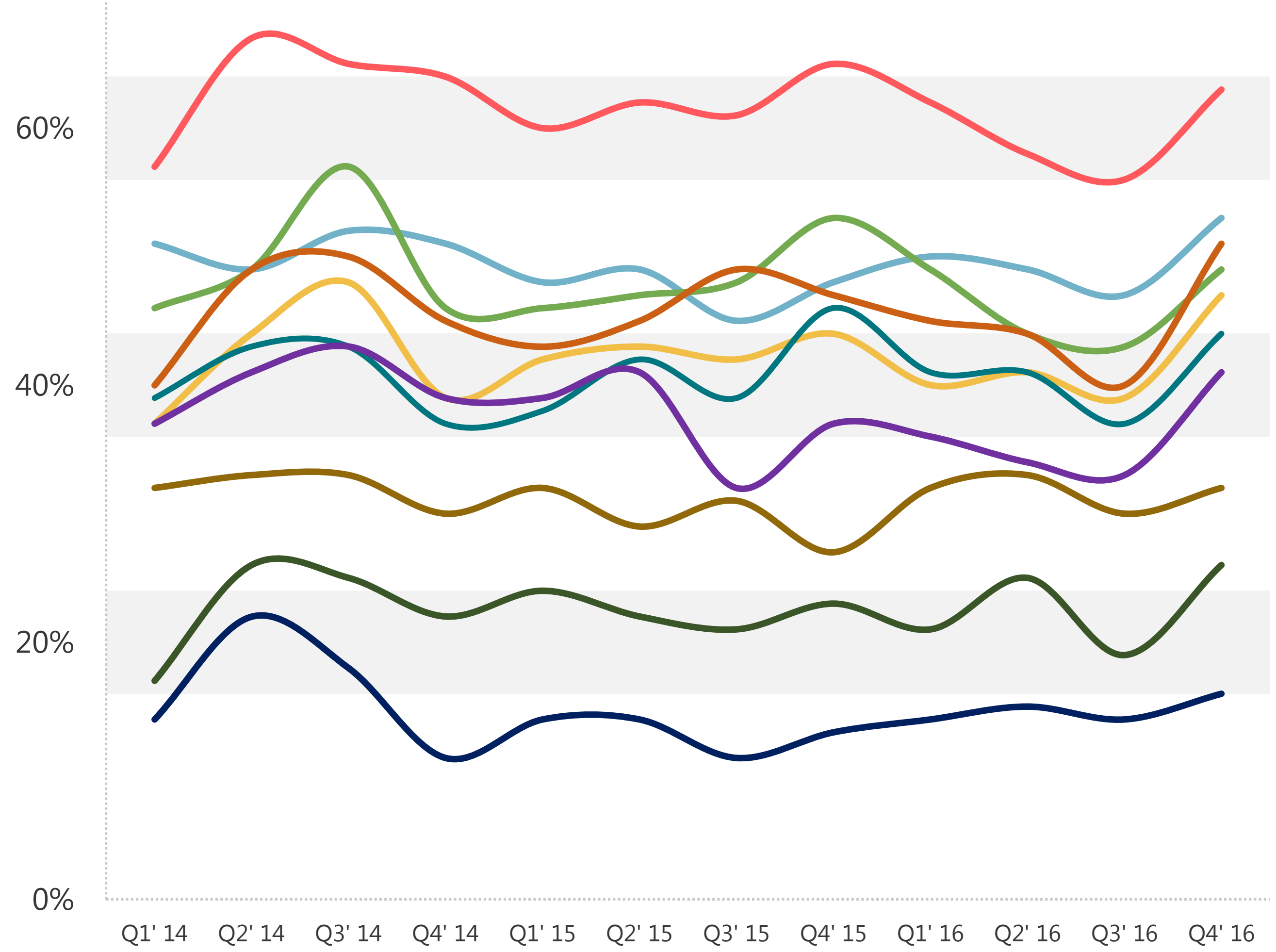
🟥 0-24% 🟧 25-49% 🟩 50-100%

Base: circa 4,000 GB adults aged 15+: Q1/ Q2/ Q3/ Q4 2016

Source: Ipsos MORI

Online shopping has had the highest increase

USE OF TABLET IN THE PAST 3 MONTHS



63% Read or send emails

53% Browse websites for personal interests

51% Online shopping

49% Visit social networking sites

47% Watch video clips on sites such as Youtube

44% Online banking

41% Download apps for free

32% Watch catch-up TV

26% Download/ stream music over the internet

16% Use the internet to make video calls (VOIP)

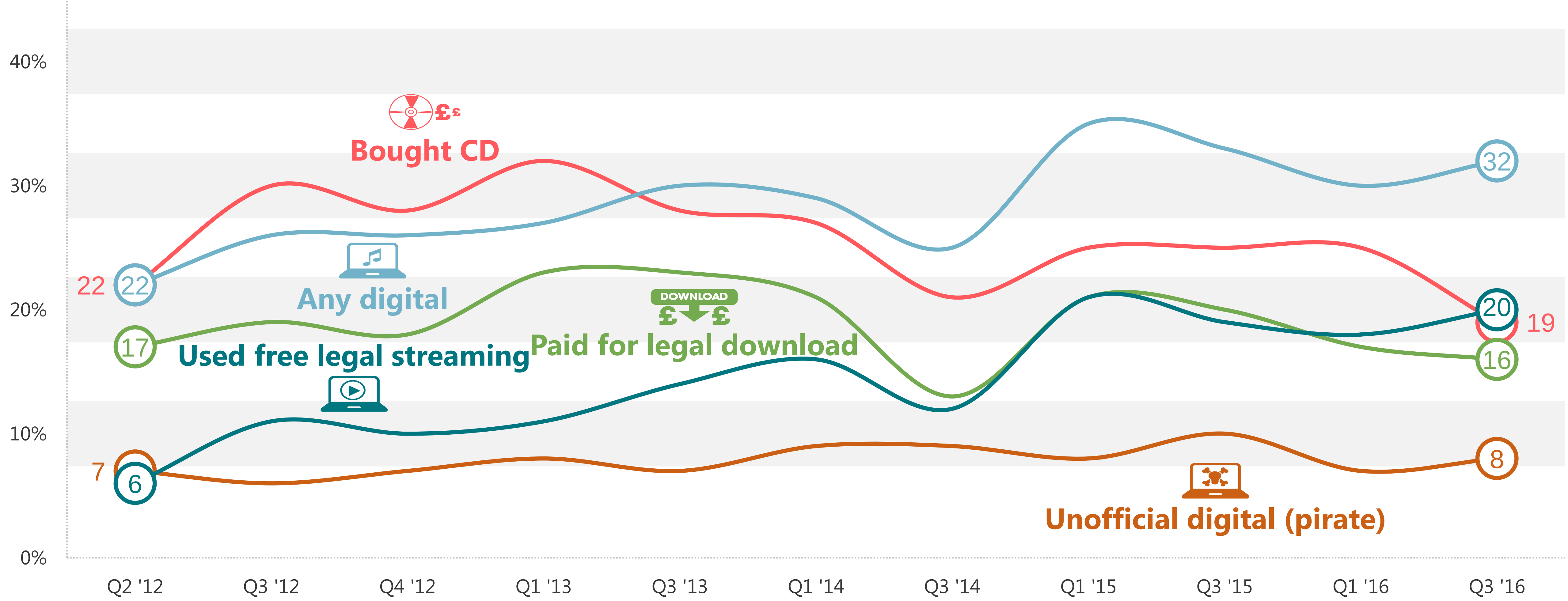
Base: circa 300-500 adults 15+ who own tablets

Source: Ipsos MORI

Content CONSUMPTION
Music / GAMES / TV / MOVIES

Consumption via bought CDs has been declining

MUSIC CONSUMPTION

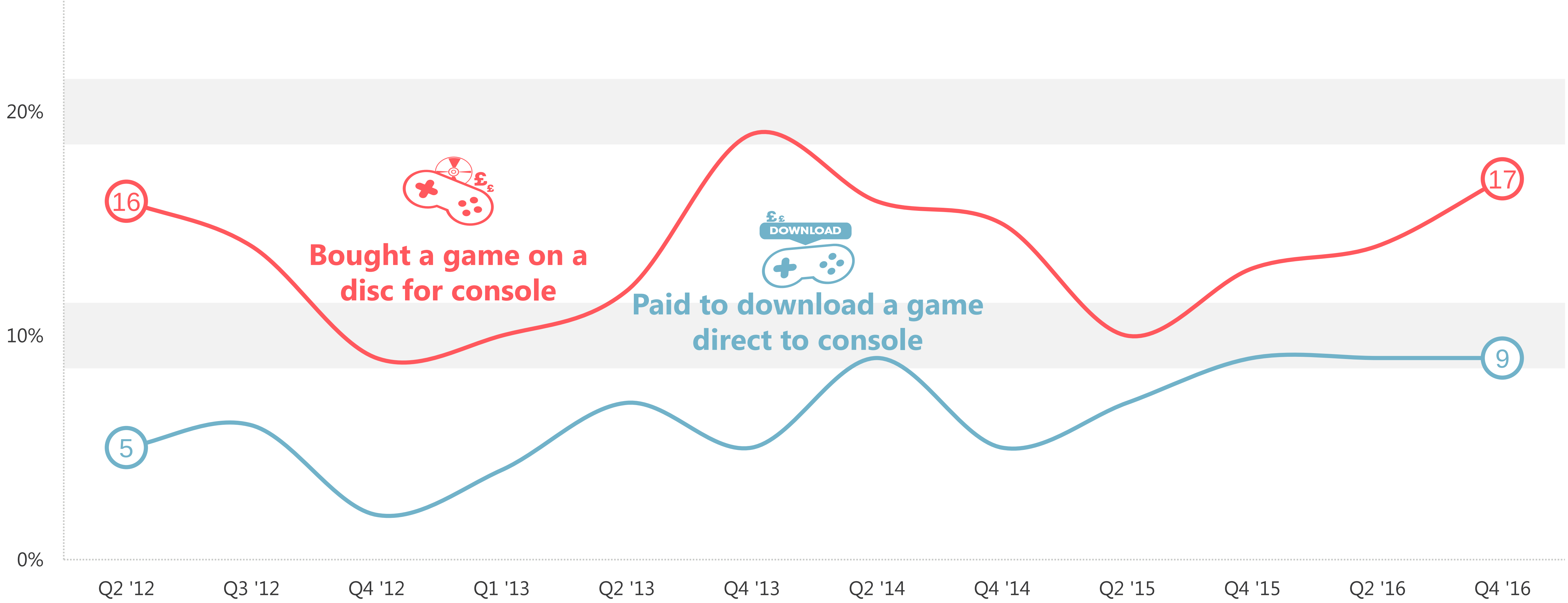


Base: circa 1,000 GB adults aged 15+ per wave / Music consumption is tracked every 6 months

Source: Ipsos MORI

Nearly 2 in 10 buy disc for games consoles

GAMES CONSUMPTION



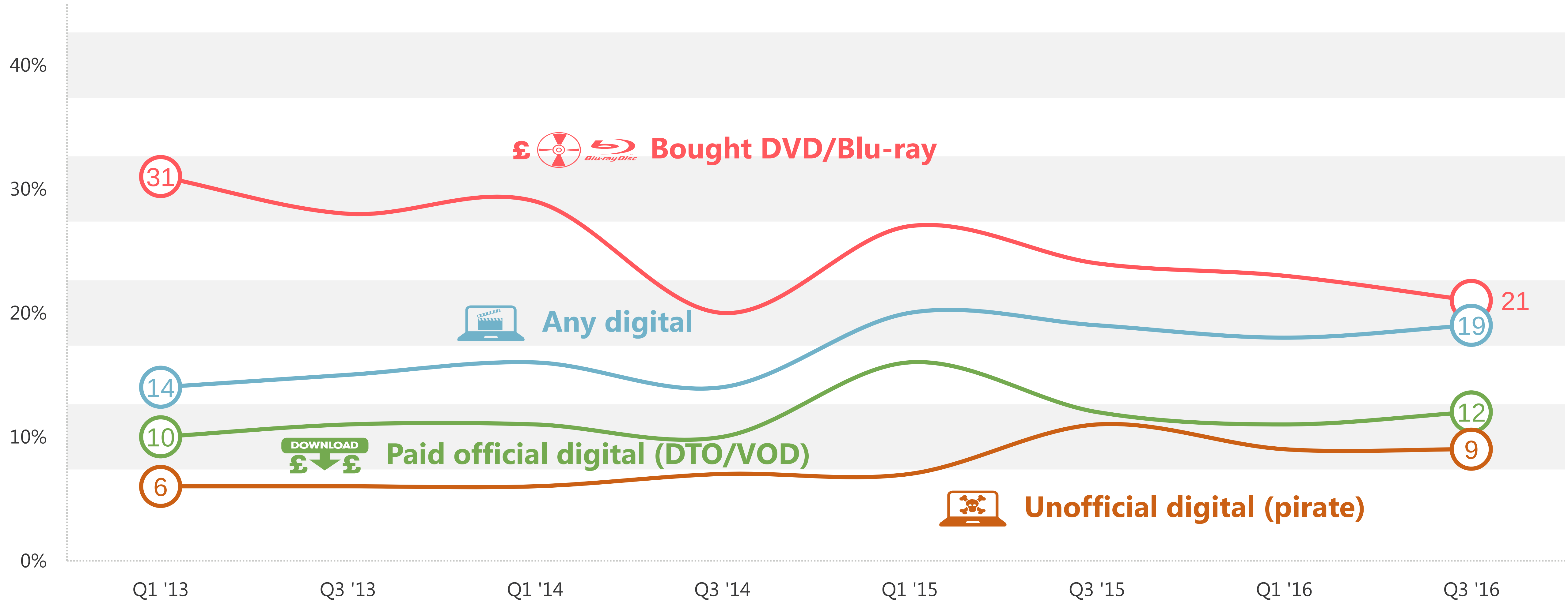
Base: circa 1,000 GB adults aged 15+ per wave / Games consumption is tracked every 6 months

Source: Ipsos MORI

Ipsos Connect

Any digital is now on par with DVD/Blu-ray

MOVIE CONSUMPTION

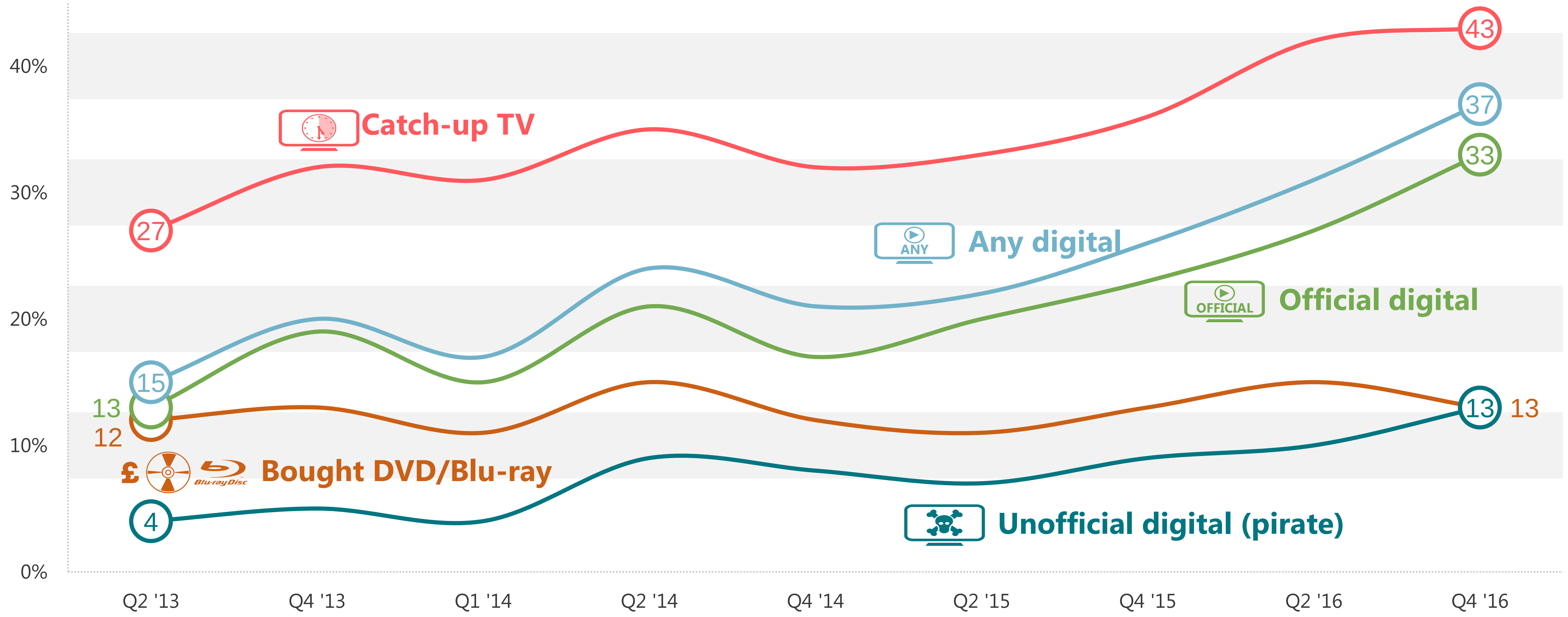


Base: circa 1,000 GB adults aged 15+ per wave / Movie consumption is tracked every 6 months

Source: Ipsos MORI

Official digital has had a steady increase

TV SERIES CONSUMPTION



Base: circa 1,000 GB adults aged 15+ per wave / TV consumption is tracked every 6 months

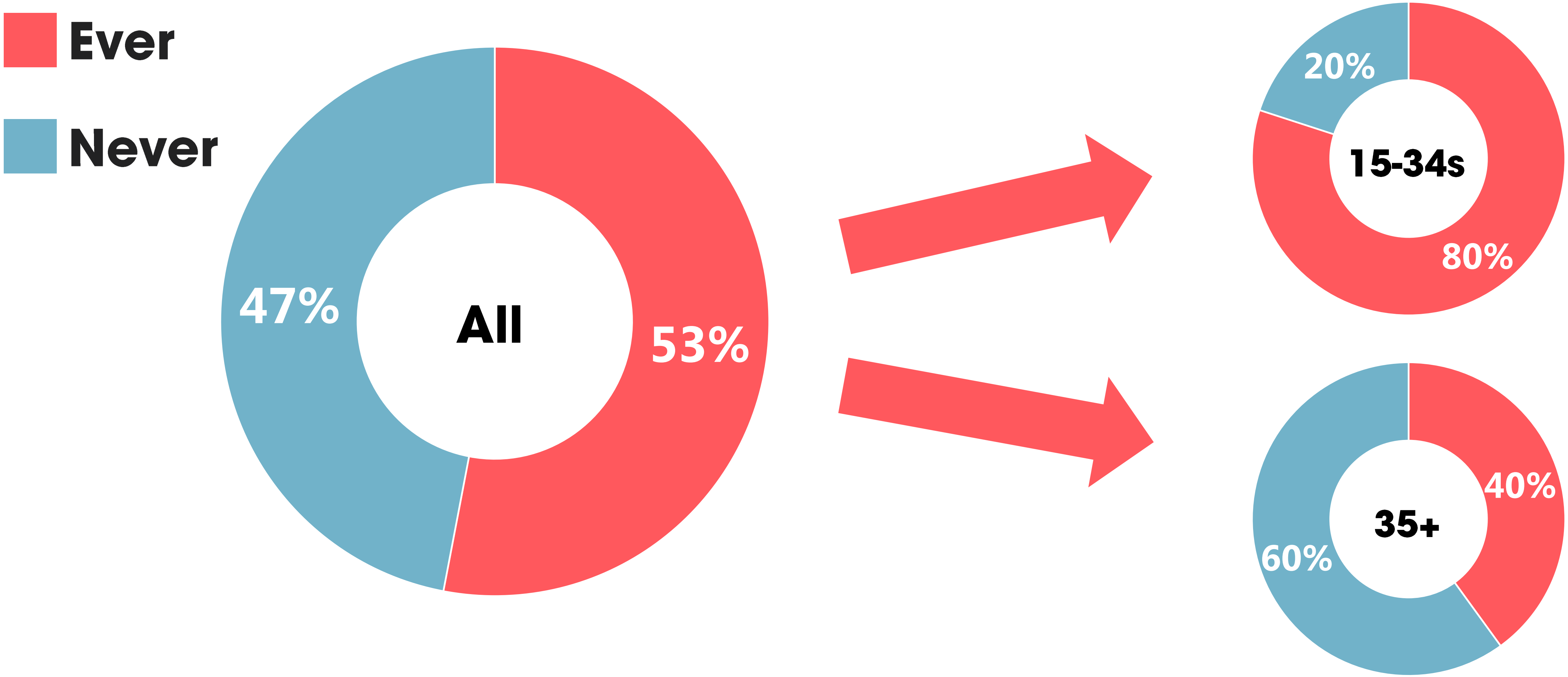
Source: Ipsos MORI

PURCHASE JOURNEY VIA SMARTPHONES

Ipsos Connect

15-35's are more likely to use a smartphone during their purchase journey than 35+

Use of Smartphone in purchase journey



Ipsos Connect Base: circa 1,000 GB adults aged 15+: Q4 2016

Source: Ipsos MORI

People are more likely to use PC/Laptops/Tablet than smartphones

Use of technology in the purchase journey

Smartphone

Research products: 25%

Specific product search: 26%

Price comparison: 22%

Product comparison: 22%

Purchasing: 23%

Sharing on social media: 31%

★★★☆☆ Post-purchase reviews/ instructions: 21%

PC/Laptop/Tablet

Research products: 48%

Specific product search: 49%

Price comparison: 48%

Product comparison: 46%

Purchasing: 43%

Sharing on social media: 25%

★★★☆☆ Post-purchase reviews/ instructions: 38%

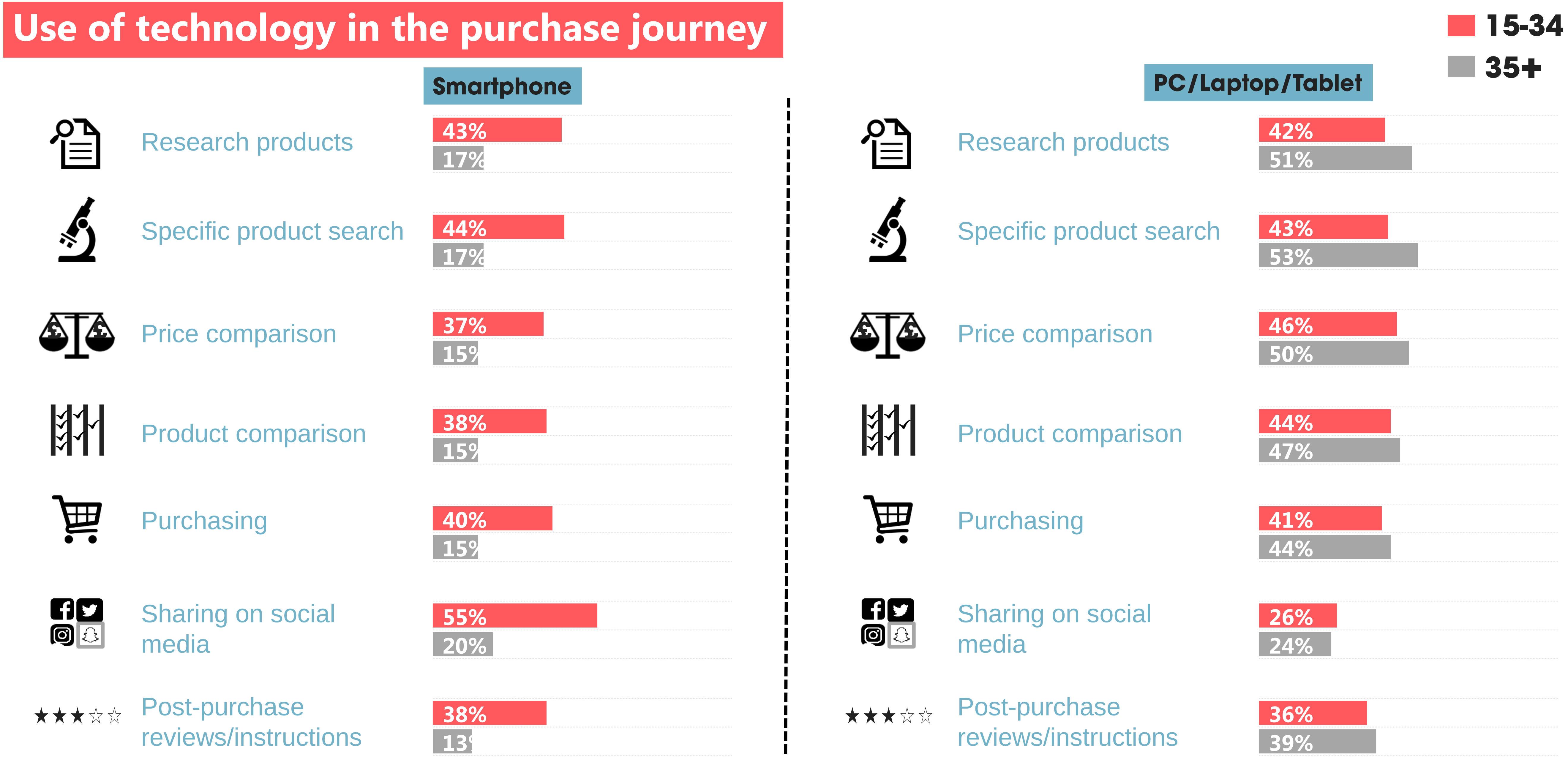
Ipsos Connect

Base: circa 1,000 GB adults aged 15+: Q4 2016

Source: Ipsos MORI

40% of 15-34s purchase products using their smartphone

Use of technology in the purchase journey



Ipsos Connect

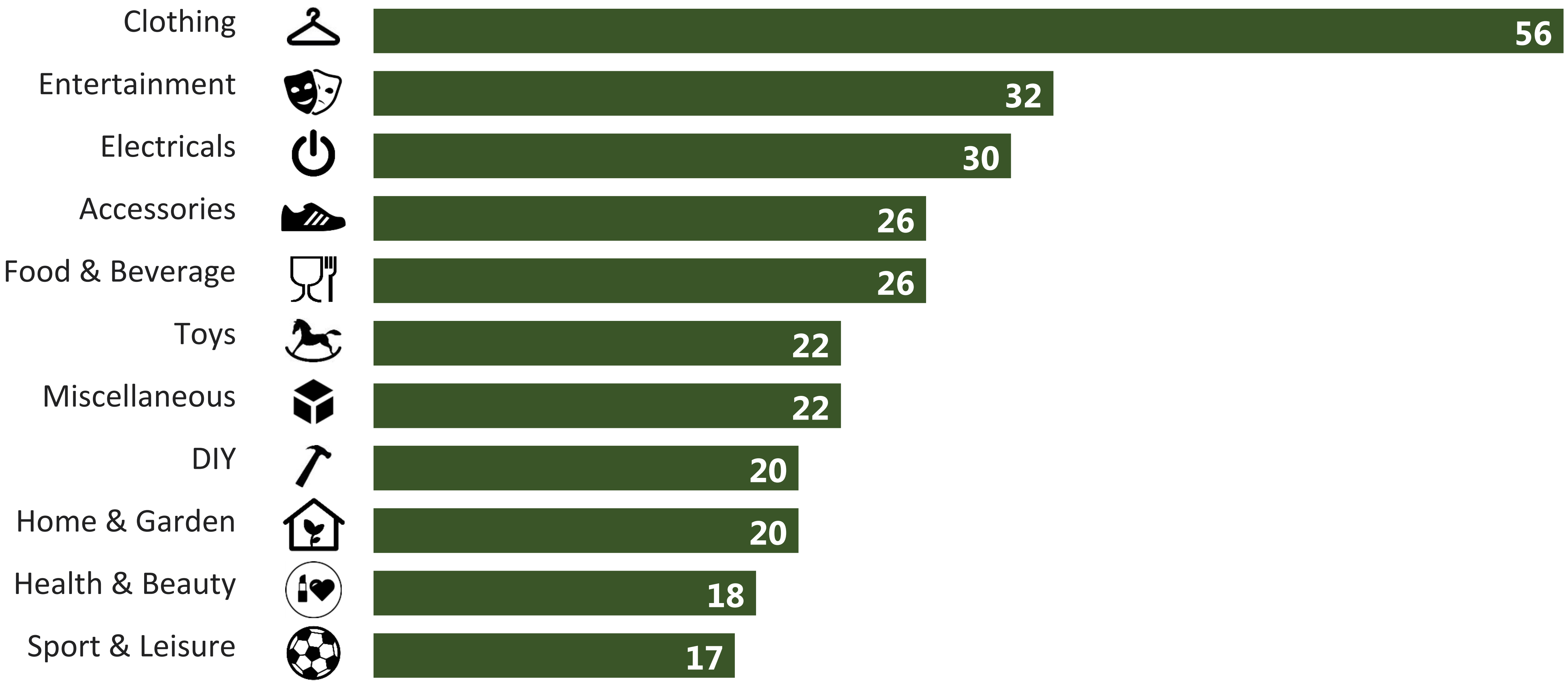
Base: circa 1,000 GB adults aged 15+: Q4 2016

Source: Ipsos MORI

Over a half purchase clothing via smartphones

% Type of items purchased via smartphone

AMONGST ALL WHO USE THEIR SMARTPHONE FOR PURCHASE JOURNEY



Base: circa 1,000 GB adults aged 15+: Q4 2016

Source: Ipsos MORI

3 in 5 females purchase clothing via smartphones

% Type of items purchased via smartphone

AMONGST ALL WHO USE THEIR SMARTPHONE FOR PURCHASE JOURNEY

	♂	♀
Clothing	52%	60%
Entertainment	🟩 39%	26%
Electricals	🟩 44%	17%
Accessories	22%	29%
Food & Beverage	27%	25%
Toys	14%	🟩 29%
Miscellaneous	27%	19%
DIY	25%	16%
Home & Garden	20%	20%
Health & Beauty	9%	🟩 26%
Sport & Leisure	🟩 27%	8%

Men are significantly more likely to make entertainment, electricals or sport & leisure purchases.

Women are more likely to buy toys (perhaps for children) or health and beauty products via their smartphone

🟩 **Significantly high**

Base: circa 1,000 GB adults aged 15+: Q4 2016

Source: Ipsos MORI

TECH TRACKER TECHNICAL DETAILS

- Ipsos MORI interviewed a quota sample of **984 adults aged 15+ in GB**.
- The latest interviews were carried out face to face **7th November – 25th November 2016**.
- Data is weighted to a **nationally representative profile**.
- **A variety of other demographic breakdowns** are available, including working status, household composition, ethnicity, income and newspaper readership.

If you are **interested in adding a question(s)** these can be added for a single measure on a single wave or on a tracking basis.

While the Tech Tracker is a multi-client study, results of customised questions would be made available exclusively to you.

The standard Ipsos MORI terms and conditions apply to this report, as with all studies the company undertakes. No press release or publication of the findings shall be made without the prior approval of Ipsos MORI. Approval will only be withheld on the grounds of inaccuracy or misinterpretation of results. Ipsos MORI reserves the right to amend the Internet Usage Statistics at any time.

Ipsos Connect is a global specialized business to co-ordinate Ipsos services in the domains of Brand Communications, Advertising and Media. Ipsos Connect amalgamates the legacy brands of Ipsos ASI and Ipsos MediaCT.

As the world of brand communications, advertising and media become increasingly complex, fragmented and digitalized, Ipsos is helping clients better embrace this modern complexity with investment in new approaches and products that will fit with the digital age. Ipsos Connect aims to be the preferred global partner for companies to measure and amplify how media, brands and consumers connect through compelling content, great communication and relevant media planning.

Ipsos Connect is a specialist division within Ipsos, one of the world's largest market research agencies. Ipsos has offices in 87 countries, generating global revenues of €1.669,5 million (2 218,4M$) in 2014.

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