Technology Tracker

TECH TRACKER

QUARTERLY RELEASE:

Q1 2017

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 1 2017 (Field in February)

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

HEADLINES

Internet usage

9 in 10 GB adults claim that they have accessed the internet. Quarter on quarter increases have brought the number of people accessing via a mobile (76%) closer to the number of those accessing at home (81%).

The most popular activities are accessing emails, (82%), personal browsing (74%) and looking up sites to buy products online (71%).

Smartphones

Smartphone ownership has steadily risen, with 4 in 5 GB adults now a smartphone owner.

The Android vs. iPhone carousel continues to turn, with Android now back on level terms after six consecutive quarters of being behind iPhone.

Connected home

The majority of devices have stable levels of ownership among GB adults, with smart TVs seeing the biggest increase in ownership over the past year (up 8% points vs. Q1 ‘16).

This increase is likely to be driven by sales during the Christmas period of 2016 (Q4 ‘16), which puts ownership of smart TVs above iPads among GB adults

Tablets

Ownership of tablets remains in line vs. previous quarters, with half of GB adults now an owner. Apple iPads continue to lead in this market, with 28% of adults owning one vs. 26% who own a tablet that isn’t an iPad.

Downloading or streaming music on tablets is down vs. Q4 ‘16.

Social networking

The number of GB adults visiting social networking sites continues to rise steadily quarter on quarter. Access to social networking sites via a smartphone has continued its upward trend, catching up to and slowly overtaking access via PCs or laptops.

Visitation to individual sites is steady, with Facebook still the most popular by some way (62% of GB adults vs. 25% for Instagram, the nearest competitor).

Content consumption

The number of GB adults buying CDs has risen to 24% after a dip during Q3 of 2016, with Blu-ray / DVD consumption also up since the same period. However piracy of TV series has seen gradual increases and viewing unofficially is now as common as buying a DVD / Blu-ray.

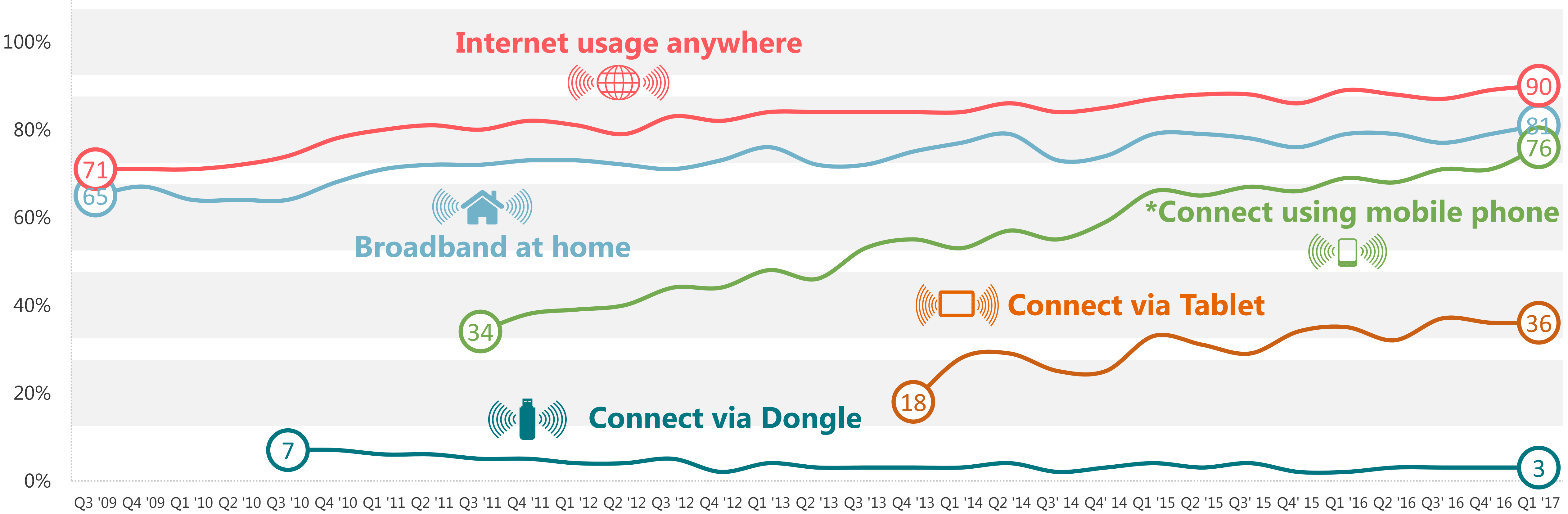
INTERNET USAGE

HOW, WHEN, WHERE

Ipsos Connect

Internet connectivity via broadband and on a mobile is similar

% 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

Just over half of females 65+ access the internet

% ACCESSING THE INTERNET BY GENDER AND SOCIAL GRADE

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	90%	99%	99%	97%	93%	87%	72%
Males AB	97%	100%	100%	100%	99%	98%	90%
Males C1	95%	99%	100%	100%	95%	93%	80%
Males C2	90%	99%	100%	99%	94%	83%	61%
Males DE	78%	98%	95%	90%	79%	69%	41%
Females	86%	99%	97%	97%	96%	89%	54%
Females AB	94%	100%	100%	100%	100%	96%	77%
Females C1	91%	100%	100%	98%	100%	94%	63%
Females C2	84%	100%	98%	98%	94%	82%	48%
Females DE	74%	98%	90%	90%	84%	82%	30%

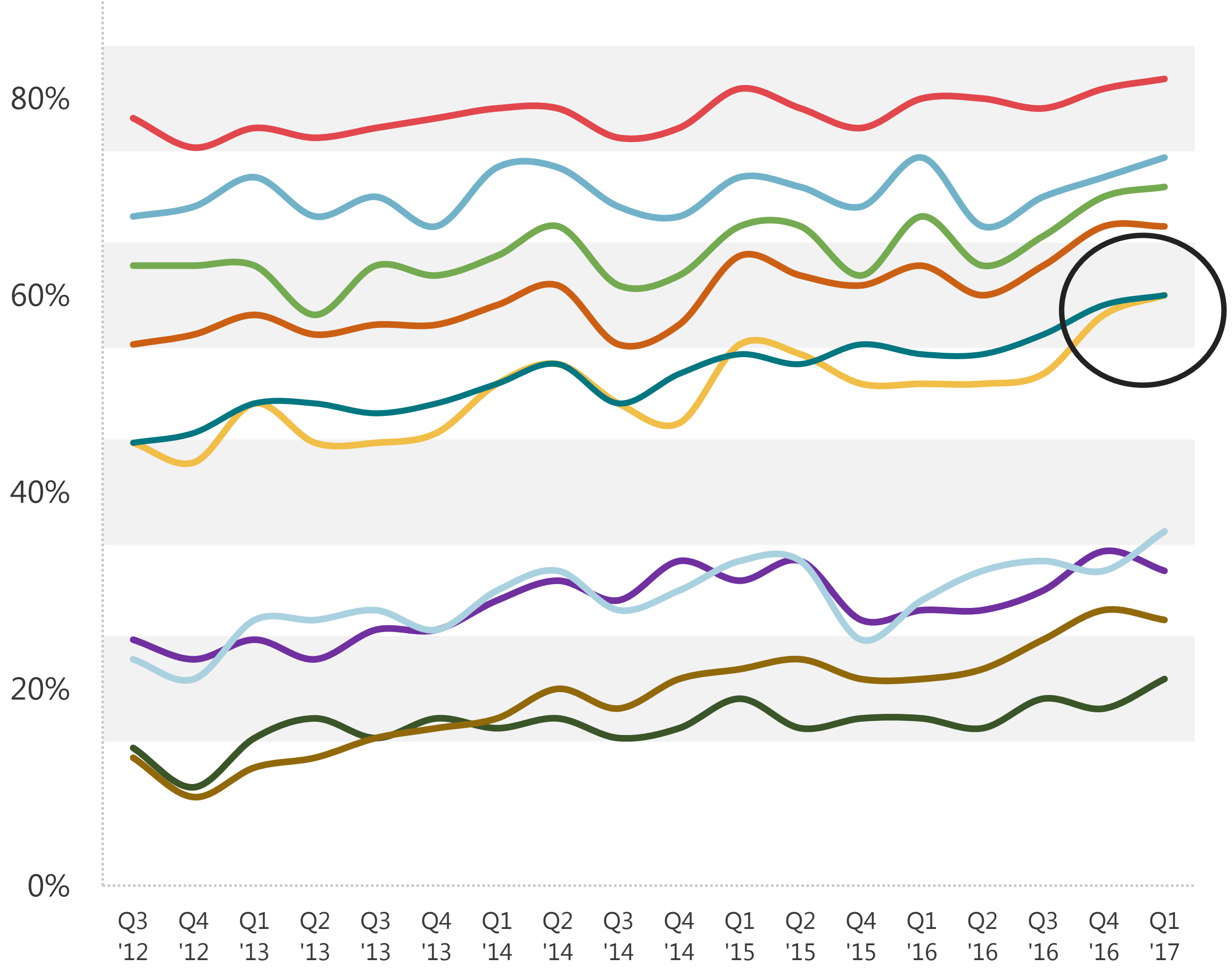
0-49% 50-79% 80-100%

Base: circa 4,000 GB adults aged 15+: Q2/ Q3/ Q4 2016/ Q1 2017

Source: Ipsos MORI

Social networking and online banking has equal usage

% USE OF THE INTERNET IN THE PAST 3 MONTHS



82%	Emails
74%	Visit sites for info on personal interests
71%	Visit sites for info on products thinking of buying
67%	Visit sites to buy products online
60%	Social networking
60%	Check bank account/ other financial holdings
36%	Download/ stream TV
32%	Download/ stream music
27%	Download/ stream movies
21%	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

Ipsos Connect

Smart TVs have seen a substantial increase y-o-y

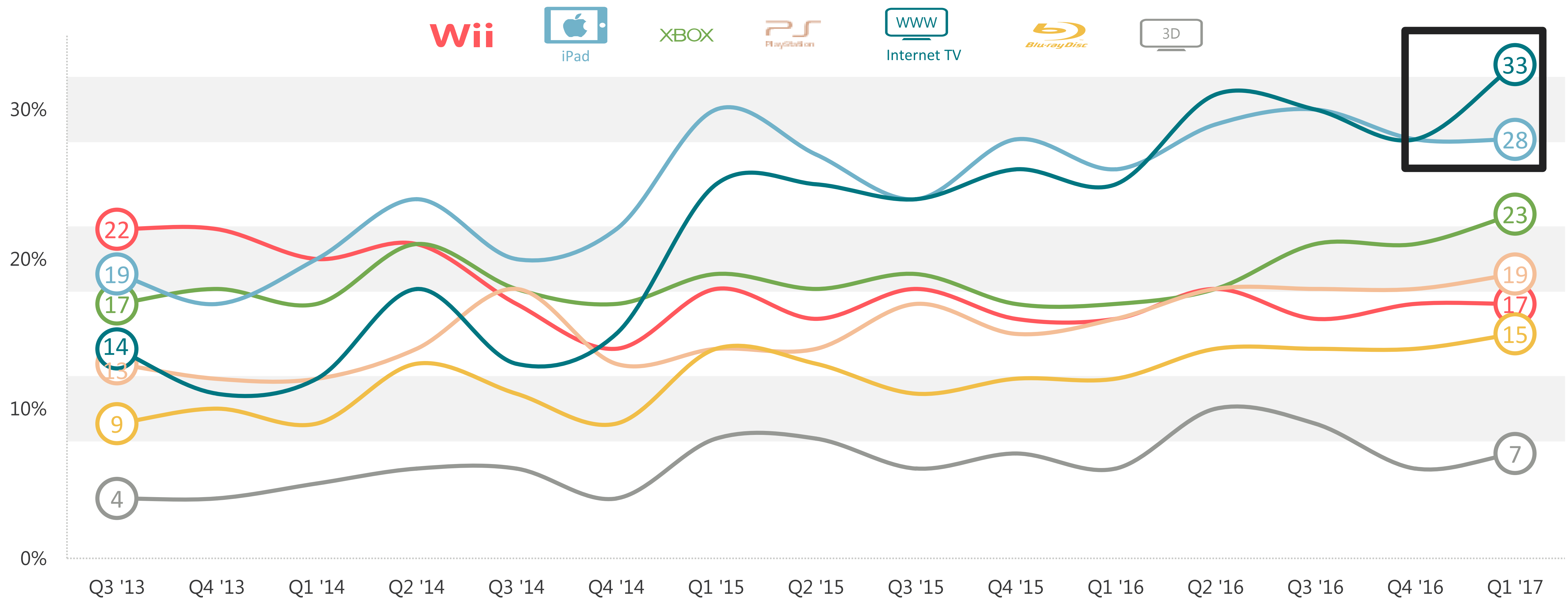
WHICH OF THE FOLLOWING DO YOU OWN/HAVE IN YOUR HOUSEHOLD?

Base: circa 1,000 GB adults aged 15+: Quarter 1 2017

Source: Ipsos MORI

Higher ownership of Smart TVs than iPads

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



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

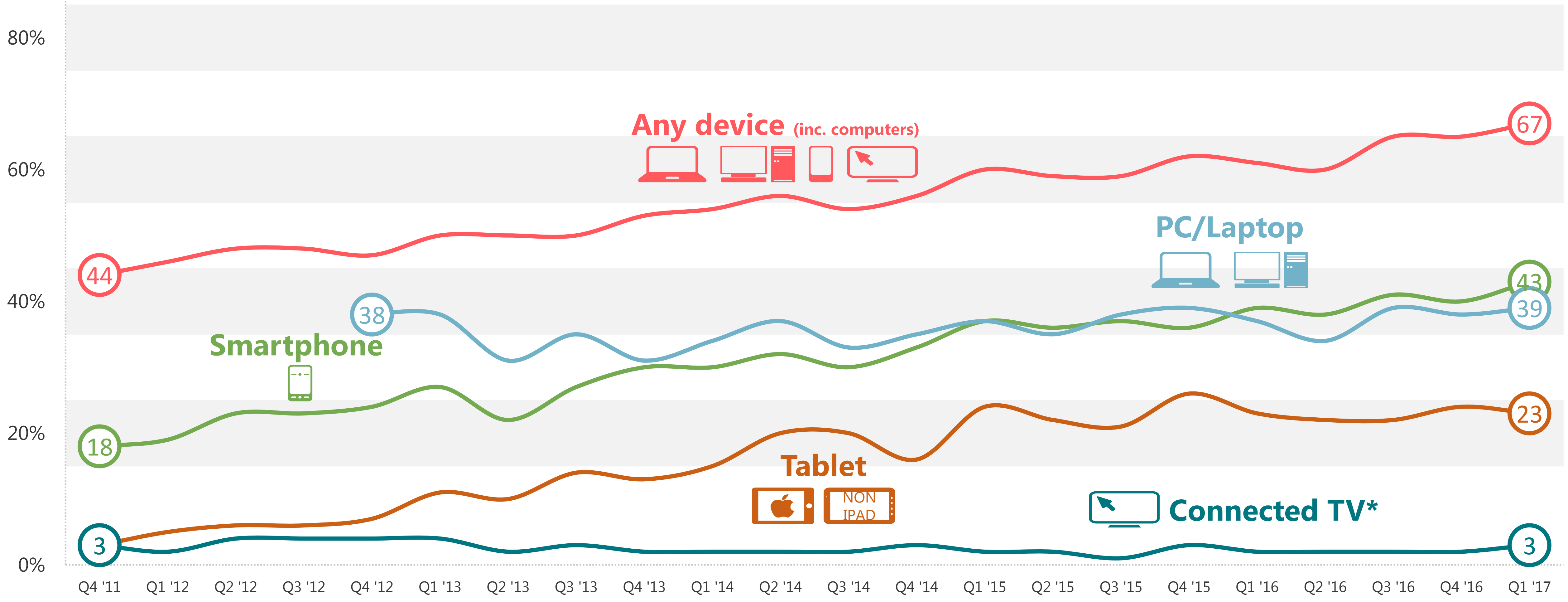
Source: Ipsos MORI

SOCIAL NETWORKING

Smartphones are accelerating ahead of PC/Laptop

% VISITING SOCIAL NETWORKING SITES

Connected TV* - Games console, web enabled TVs and PCs connected to a TV

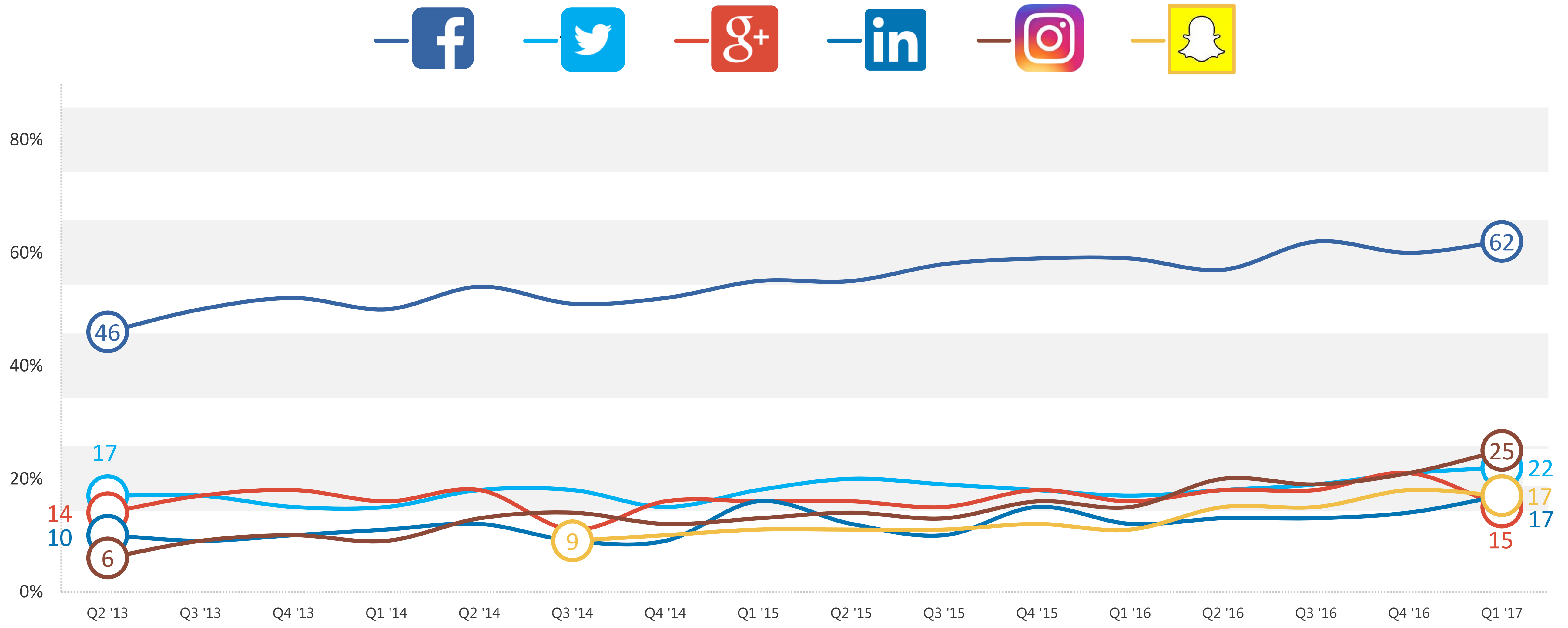


Base: circa 1,000 GB adults aged 15+ per wave

Source: Ipsos MORI

Visitation of social networking platforms is broadly stable

% VISITED IN LAST 3 MONTHS



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

Source: Ipsos MORI

Profile of Facebook users closely matches that of the GB population

ALL ADULTS		
49%	Male	46
51%	Female	54
15%	15-24	19
17%	25-34	23
15%	35-44	18
17%	45-54	19
36%	55+	20
27%	AB	26
28%	C1	30
21%	C2	21
25%	DE	23
79%	Own Smartphone	93
50%	Own Tablet	58

The profile of Facebook users continues to be evenly spread over the GB adult population in terms of age, with both the young and older demographics making up relatively level proportions of usage.

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

Base: circa GB adults (1,000) / All visiting / using Facebook in last 3 months (596) Q1 2017

Source: Ipsos MORI

Around 1 in 4 of those aged 65+have used Facebook

% 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	58%	83%	77%	68%	59%	39%	25%
Males AB	54%	85%	81%	67%	60%	40%	30%
Males C1	64%	84%	74%	80%	64%	42%	26%
Males C2	59%	84%	75%	65%	63%	40%	22%
Males DE	53%	79%	80%	59%	44%	36%	19%
Females	63%	87%	88%	78%	66%	56%	22%
Females AB	67%	86%	95%	81%	75%	52%	34%
Females C1	66%	90%	86%	77%	65%	60%	25%
Females C2	63%	87%	87%	82%	61%	59%	20%
Females DE	56%	85%	84%	74%	61%	53%	9%

0-24% 25-49% 50-100%

Base: circa 4,000 GB adults aged 15+: Q2/ Q3/ Q4 2016/ Q1 2017

Source: Ipsos MORI

Google+ usage is skewed more towards 15-24 year olds

ALL ADULTS			
49%	Male	50	
51%	Female	50	
15%	15-24	23	VS. 19% (Q4 '16)
17%	25-34	14	VS. 19% (Q4 '16)
15%	35-44	22	
17%	45-54	24	
36%	55+	17	
27%	AB	23	
28%	C1	36	
21%	C2	22	
25%	DE	19	
79%	Own Smartphone	91	
50%	Own Tablet	62	

Google+ users are equally split among males and females and have a younger profile than the GB adult population.

Both smartphone and tablet ownership continues to be relatively higher than the GB population. (91% for smartphones and 62% for tablets).

Base: circa GB adults (1,000) / All visiting / using Google+ in last 3 months (151) Q1 2017

Source: Ipsos MORI

Males, ABC1 are the highest users of 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%	21%	18%	24%	23%	17%	10%
Males AB	22%	16%	27%	26%	28%	24%	13%
Males C1	22%	30%	17%	26%	27%	16%	10%
Males C2	16%	14%	12%	27%	24%	15%	4%
Males DE	13%	21%	14%	17%	7%	12%	7%
Females	18%	29%	21%	24%	22%	15%	4%
Females AB	18%	21%	18%	26%	24%	19%	3%
Females C1	19%	33%	24%	21%	17%	15%	6%
Females C2	18%	27%	20%	27%	21%	9%	7%
Females DE	18%	31%	23%	21%	28%	13%	2%

0-24% 25-49% 50-100%

Base: circa 4,000 GB adults aged 15+: Q2/ Q3/ Q4 2016/ Q1 2017

Source: Ipsos MORI

The profile of Twitter users leans towards those aged 15-34 and those who are social grade ABC1

ALL ADULTS		
49%	Male	49
51%	Female	51
15%	15-24	25
17%	25-34	21
15%	35-44	18
17%	45-54	23
36%	55+	13
27%	AB	33
28%	C1	35
21%	C2	15
25%	DE	16
79%	Own Smartphone	99
50%	Own Tablet	69

Over two thirds of Twitter users are ABC1s.

As the preferred mode of access, it is not surprising to see near universal Smartphone ownership.

Base: circa GB adults (1,000) / All visiting / using Twitter in last 3 months (208) Q1 2017

Source: Ipsos MORI

Young males who are social grade AB have the highest usage of Twitter

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

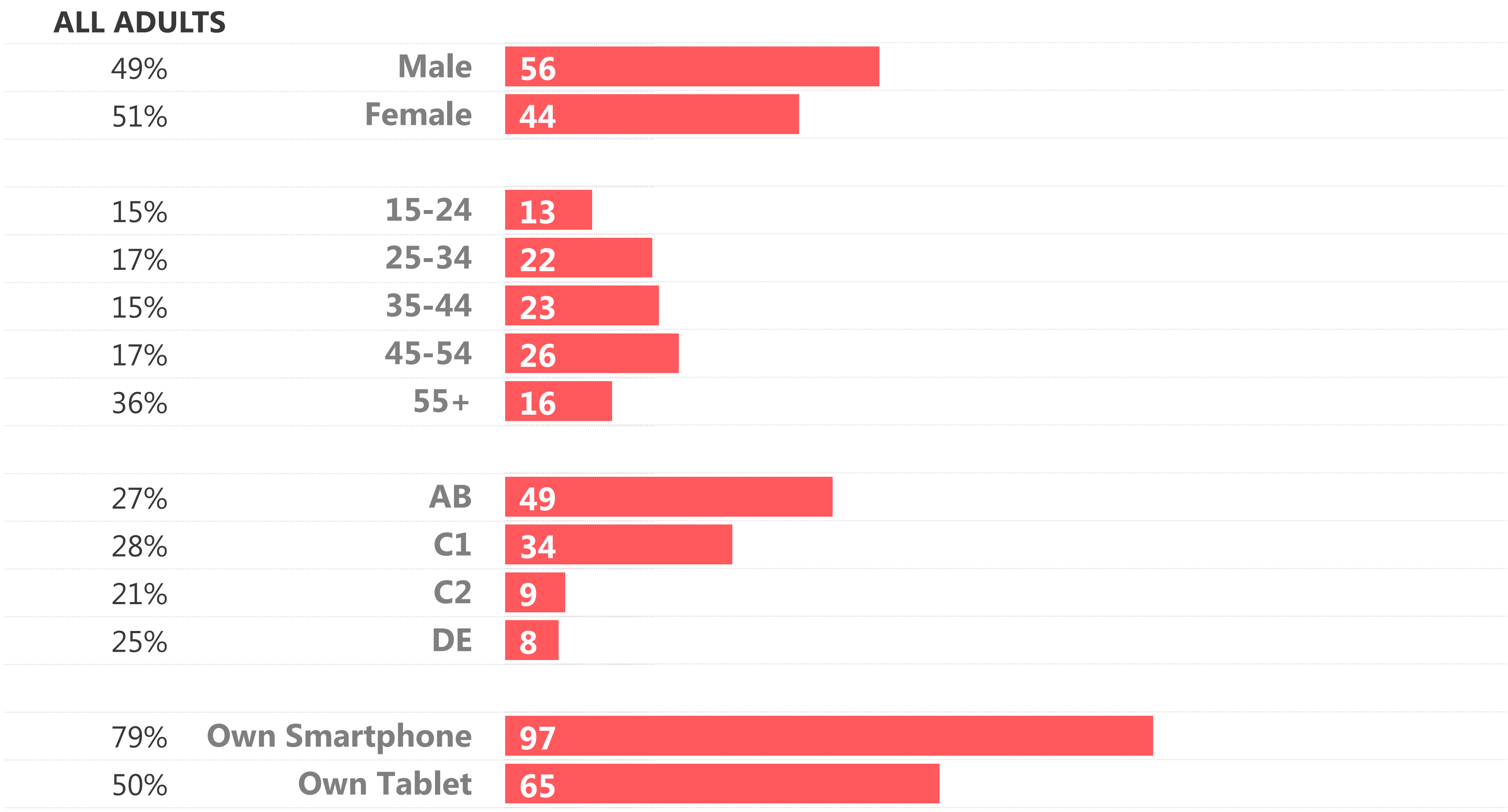
	All	15-24	25-34	35-44	45-54	55-64	65+
Males	22%	38%	28%	32%	20%	13%	5%
Males AB	28%	61%	42%	47%	25%	19%	8%
Males C1	27%	41%	33%	41%	23%	14%	5%
Males C2	16%	30%	16%	20%	20%	9%	1%
Males DE	15%	31%	20%	19%	7%	5%	1%
Females	18%	36%	23%	23%	20%	11%	3%
Females AB	26%	44%	39%	32%	36%	15%	4%
Females C1	19%	41%	22%	25%	15%	13%	4%
Females C2	15%	30%	22%	17%	19%	7%	2%
Females DE	11%	31%	11%	13%	7%	6%	1%

0-24% 25-49% 50-100%

Base: circa 4,000 GB adults aged 15+: Q2/ Q3/ Q4 2016/ Q1 2017

Source: Ipsos MORI

Nearly half of LinkedIn users are people who fall into the AB social grade



LinkedIn is a more specific social network: 2 in 3 of its users are 35+, with males (56%) making up slightly more of the profile than females (44%)

Base: circa GB adults (1,000) / All visiting / using LinkedIn in last 3 months (155) Q1 2017

Source: Ipsos MORI

AB males aged 35-44 use LinkedIn the most

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

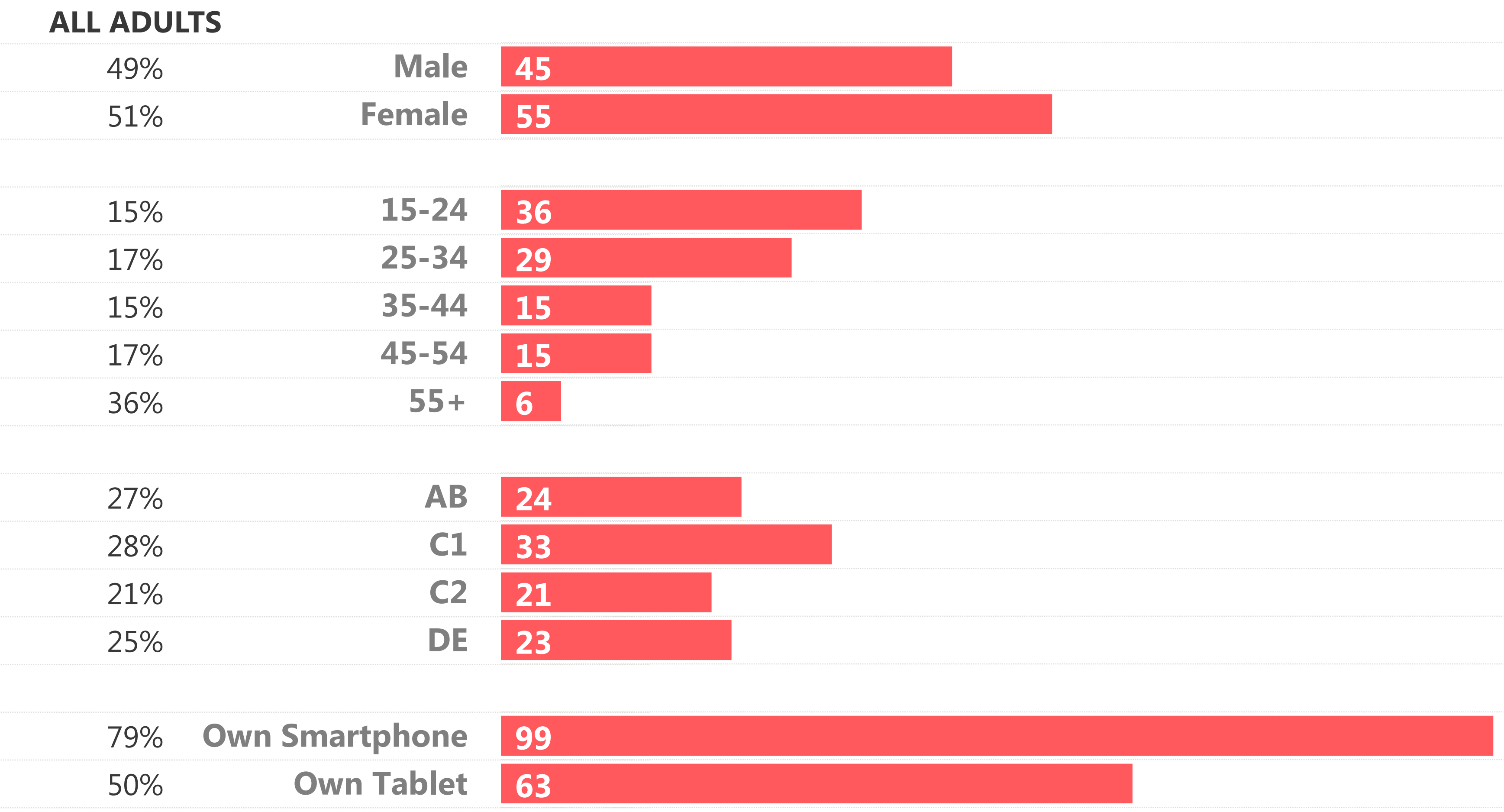
	All	15-24	25-34	35-44	45-54	55-64	65+
Males	17%	12%	20%	26%	25%	20%	6%
Males AB	31%	14%	36%	50%	39%	39%	11%
Males C1	24%	18%	30%	38%	32%	18%	5%
Males C2	7%	10%	9%	6%	13%	6%	0%
Males DE	4%	6%	0%	6%	3%	4%	3%
Females	11%	13%	14%	17%	17%	10%	1%
Females AB	22%	19%	35%	32%	34%	14%	5%
Females C1	12%	17%	13%	13%	20%	10%	0%
Females C2	7%	10%	8%	9%	3%	13%	1%
Females DE	4%	9%	3%	8%	3%	2%	0%

0-24% 25-49% 50-100%

Base: circa 4,000 GB adults aged 15+: Q2/ Q3/ Q4 2016/ Q1 2017

Source: Ipsos MORI

Females have higher Instagram usage than males



Over two thirds of all Instagram users are aged 15-34, with usage decreasing with age.

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

Base: circa GB adults (1,000) / All visiting / using Instagram in last 3 months (232) Q1 2017

Source: Ipsos MORI

3 in 5 young females used Instagram in the past 3 months

% ACCESSING INSTAGRAM BY GENDER AND SOCIAL GRADE

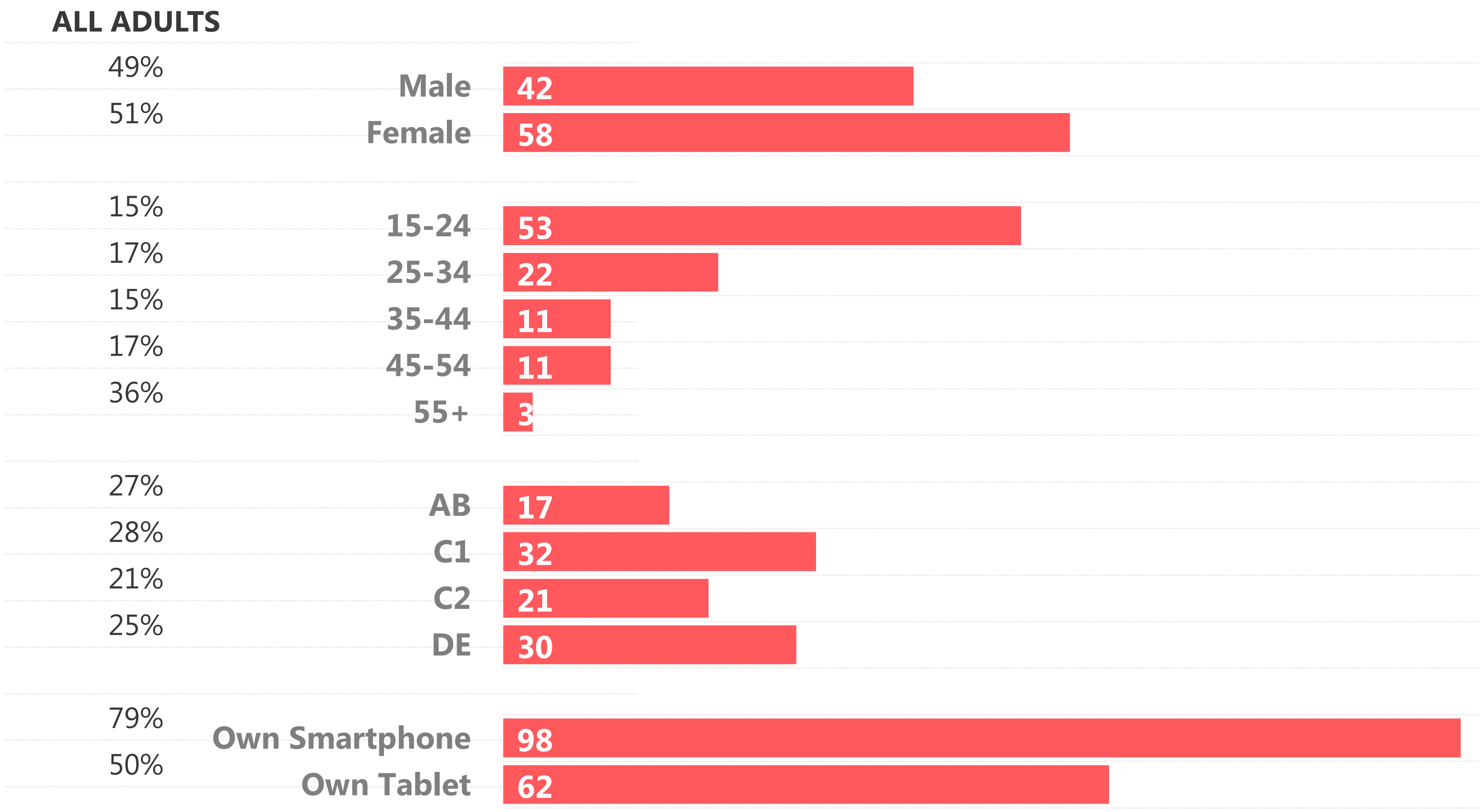
	All	15-24	25-34	35-44	45-54	55-64	65+
Males	19%	47%	32%	18%	10%	7%	2%
Males AB	17%	62%	30%	15%	13%	11%	3%
Males C1	25%	51%	40%	27%	11%	7%	2%
Males C2	19%	41%	30%	23%	10%	4%	2%
Males DE	15%	42%	28%	6%	3%	3%	0%
Females	23%	61%	39%	25%	18%	7%	1%
Females AB	26%	67%	52%	32%	22%	13%	1%
Females C1	25%	66%	39%	24%	18%	7%	1%
Females C2	21%	50%	35%	26%	18%	4%	0%
Females DE	21%	60%	31%	14%	15%	5%	1%

0-24% 25-49% 50-100%

Base: circa 4,000 GB adults aged 15+: Q2/ Q3/ Q4 2016/ Q1 2017

Source: Ipsos MORI

Snapchat users are mainly 15-24 years old and females



More than half of all Snapchat users are aged 15-24, with equal usage amongst social grades.

Snapchat functionality also leans itself to almost universal Smartphone ownership.

Base: circa GB adults (1,000) / All visiting / using Snapchat in last 3 months (165) Q1 2017

Source: Ipsos MORI

The majority of Snapchat users are 15-24 females

% 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	14%	52%	18%	7%	7%	2%	1%
Males AB	13%	63%	32%	1%	12%	4%	0%
Males C1	18%	62%	15%	10%	5%	2%	1%
Males C2	11%	35%	15%	7%	9%	1%	1%
Males DE	15%	50%	11%	11%	1%	0%	0%
Females	18%	63%	32%	12%	10%	1%	0%
Females AB	16%	70%	32%	14%	14%	1%	0%
Females C1	19%	68%	34%	8%	5%	4%	0%
Females C2	16%	51%	30%	13%	8%	0%	0%
Females DE	20%	62%	30%	14%	14%	0%	1%

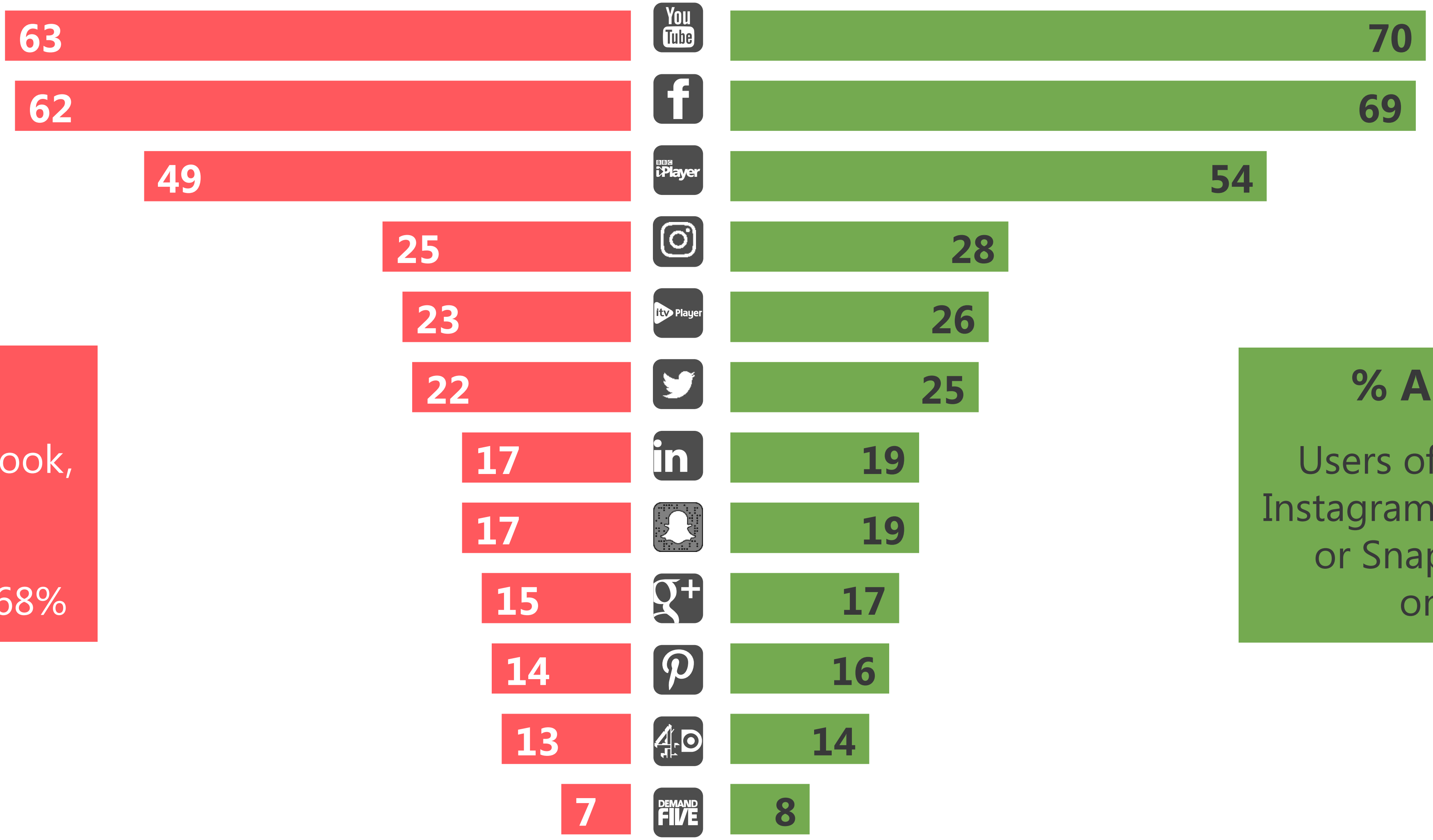
0-24% 25-49% 50-100%

Base: circa 4,000 GB adults aged 15+: Q2/ Q3/ Q4 2016/ Q1 2017

Source: Ipsos MORI

Facebook and YouTube are frequently visited by adults

% VISITED IN LAST 3 MONTHS



% All adults

Users of either Facebook, Instagram, Twitter, LinkedIn or Snapchat amongst all adults - 68%

% All online adults

Users of either Facebook, Instagram, Twitter, LinkedIn or Snapchat amongst all online adults - 75%

Base: circa GB adults 1,000 adults aged 15+: Q1 2017

Base: 867 GB online adults aged 15+: Q1 2017

Source: Ipsos MORI

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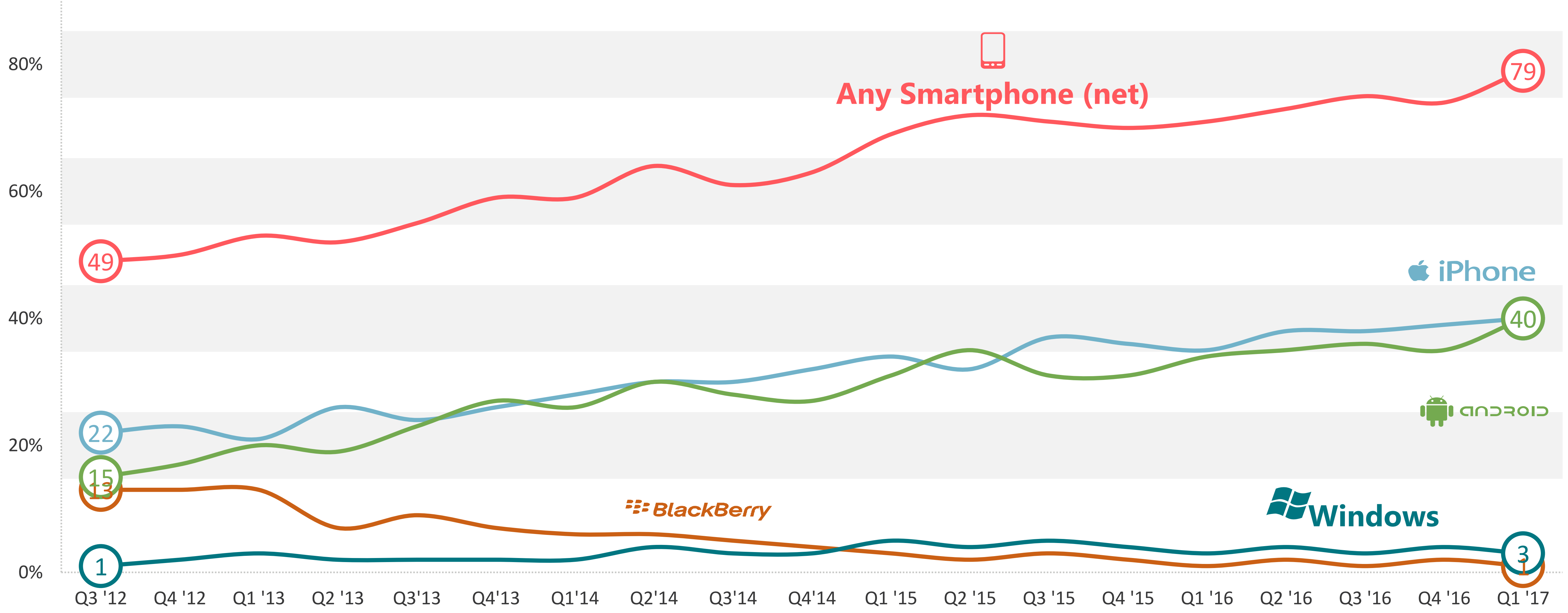
SMARTPHONE OWNERSHIP

Android and iPhone are level pegging once more

% OWN by MANUFACTURER



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

Source: Ipsos MORI

Ownership amongst young ABs is nearly universal

% OWN A SMARTPHONE BY GENDER AND SOCIAL GRADE

	All	15-24	25-34	35-44	45-54	55-64	65+
Males%	78%	95%	94%	90%	84%	71%	40%
Males AB%	82%	96%	98%	94%	90%	84%	55%
Males C1%	82%	96%	95%	92%	87%	73%	40%
Males C2%	78%	96%	95%	92%	83%	69%	30%
Males DE%	67%	92%	89%	79%	72%	51%	22%
Females%	73%	97%	94%	92%	85%	63%	28%
Females AB%	81%	100%	100%	99%	94%	80%	39%
Females C1%	76%	97%	94%	91%	85%	64%	35%
Females C2%	71%	96%	96%	89%	81%	63%	24%
Females DE%	63%	97%	89%	84%	73%	44%	16%

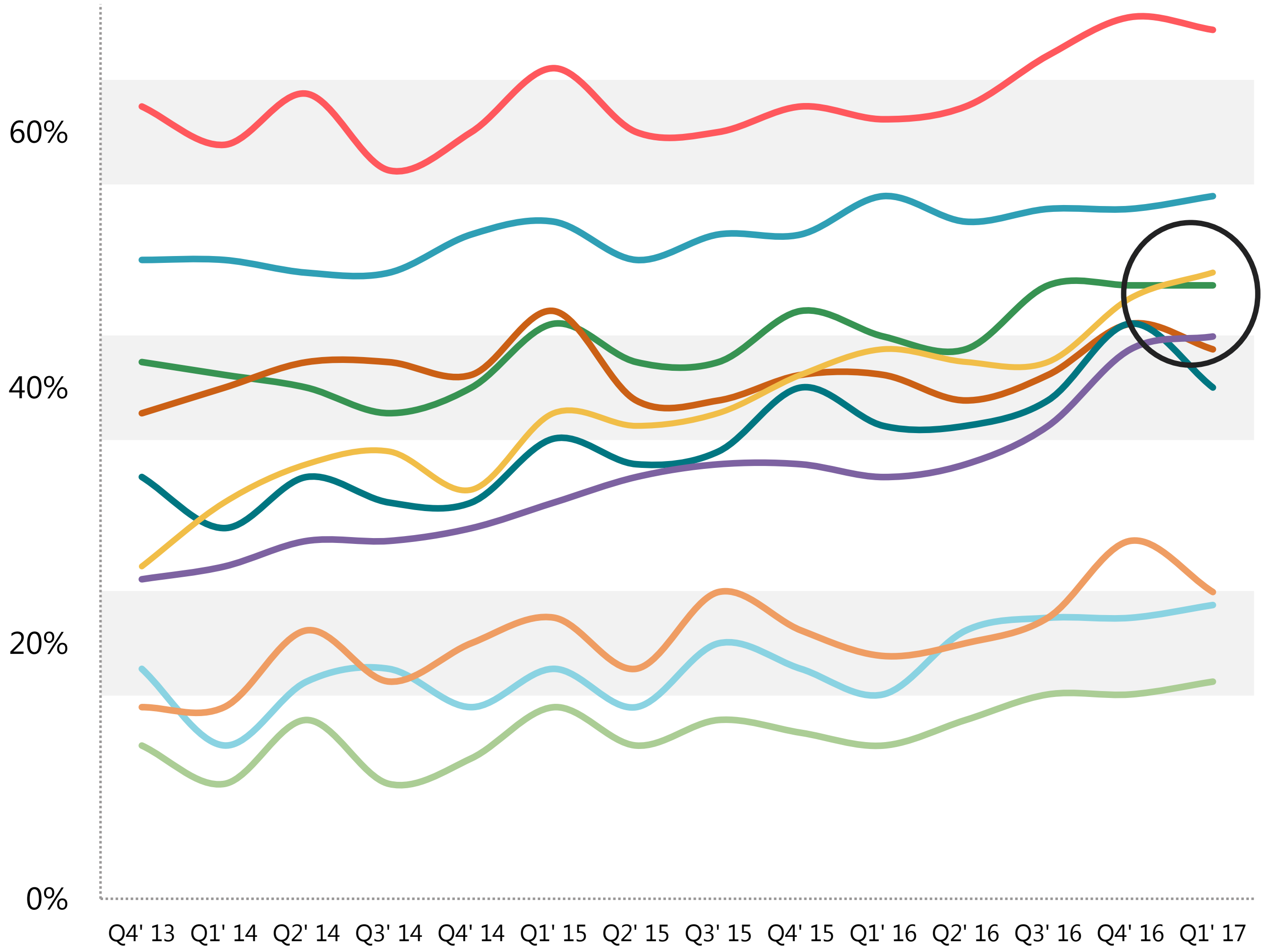
0-24% 25-49% 50-100%

Base: circa 4,000 GB adults aged 15+: Q2/ Q3/ Q4 2016/ Q1 2017

Source: Ipsos MORI

Nearly half use their smartphone for online banking

USE OF SMARTPHONE IN THE PAST 3 MONTHS



- **68%** Read or send emails
- **55%** Visit social networking sites
- **49%** Online banking
- **48%** Browse websites for personal interests
- **44%** Online shopping
- **43%** Download apps for free
- **40%** Watch video clips on sites such as YouTube
- **24%** Download/ stream music over the internet
- **23%** Use instant messaging services such as BBM
- **17%** Watch catch-up TV

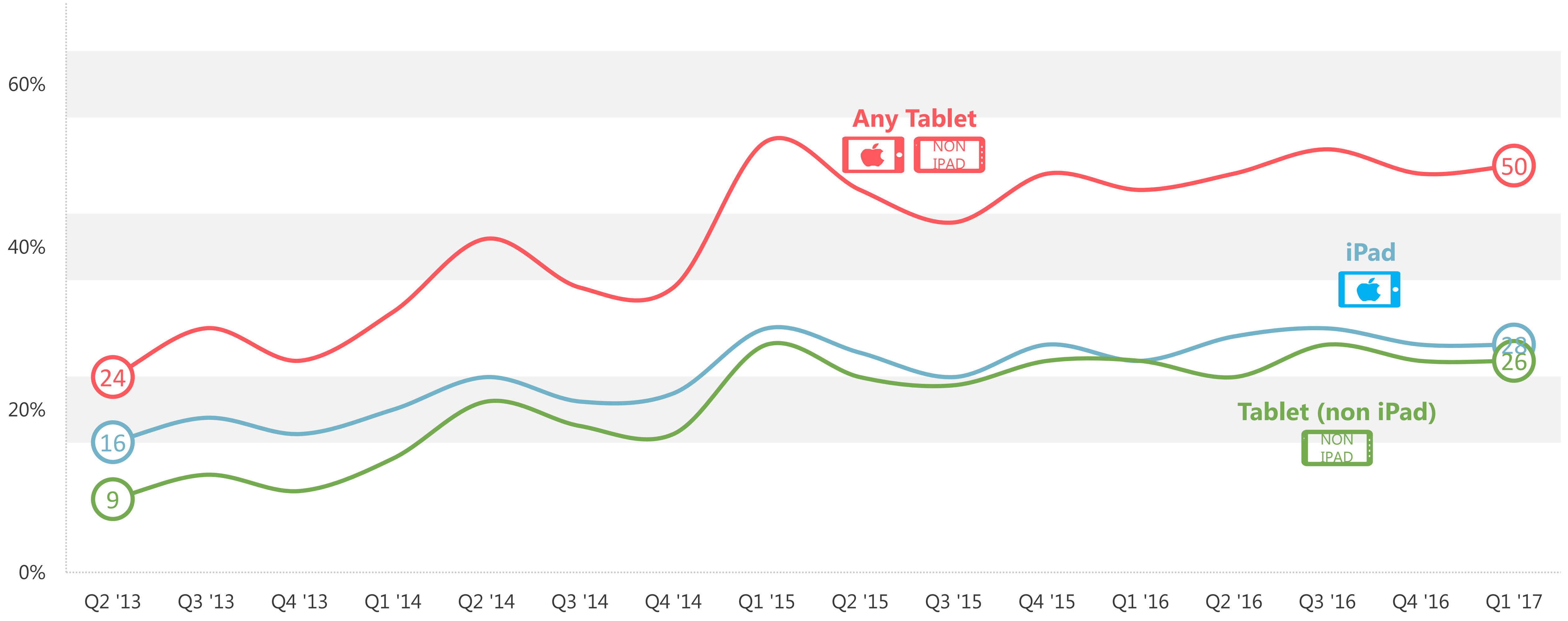
Base: circa 500-750 smartphone owners per wave

Source: Ipsos MORI

TABLET OWNERSHIP

Tablet ownership has remained stable

% OWN A TABLET IN THE HOUSEHOLD



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

Source: Ipsos MORI

2 in 3 GB adults 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%	42%	51%	59%	57%	50%	38%
Males AB	63%	44%	67%	69%	75%	71%	50%
Males C1	51%	44%	56%	64%	51%	55%	39%
Males C2	43%	41%	46%	51%	55%	33%	32%
Males DE	35%	40%	28%	50%	40%	29%	23%
Females	51%	59%	57%	56%	61%	46%	32%
Females AB	62%	78%	60%	66%	73%	55%	51%
Females C1	53%	62%	54%	60%	65%	52%	30%
Females C2	47%	42%	63%	53%	57%	43%	29%
Females DE	40%	59%	54%	40%	42%	34%	18%

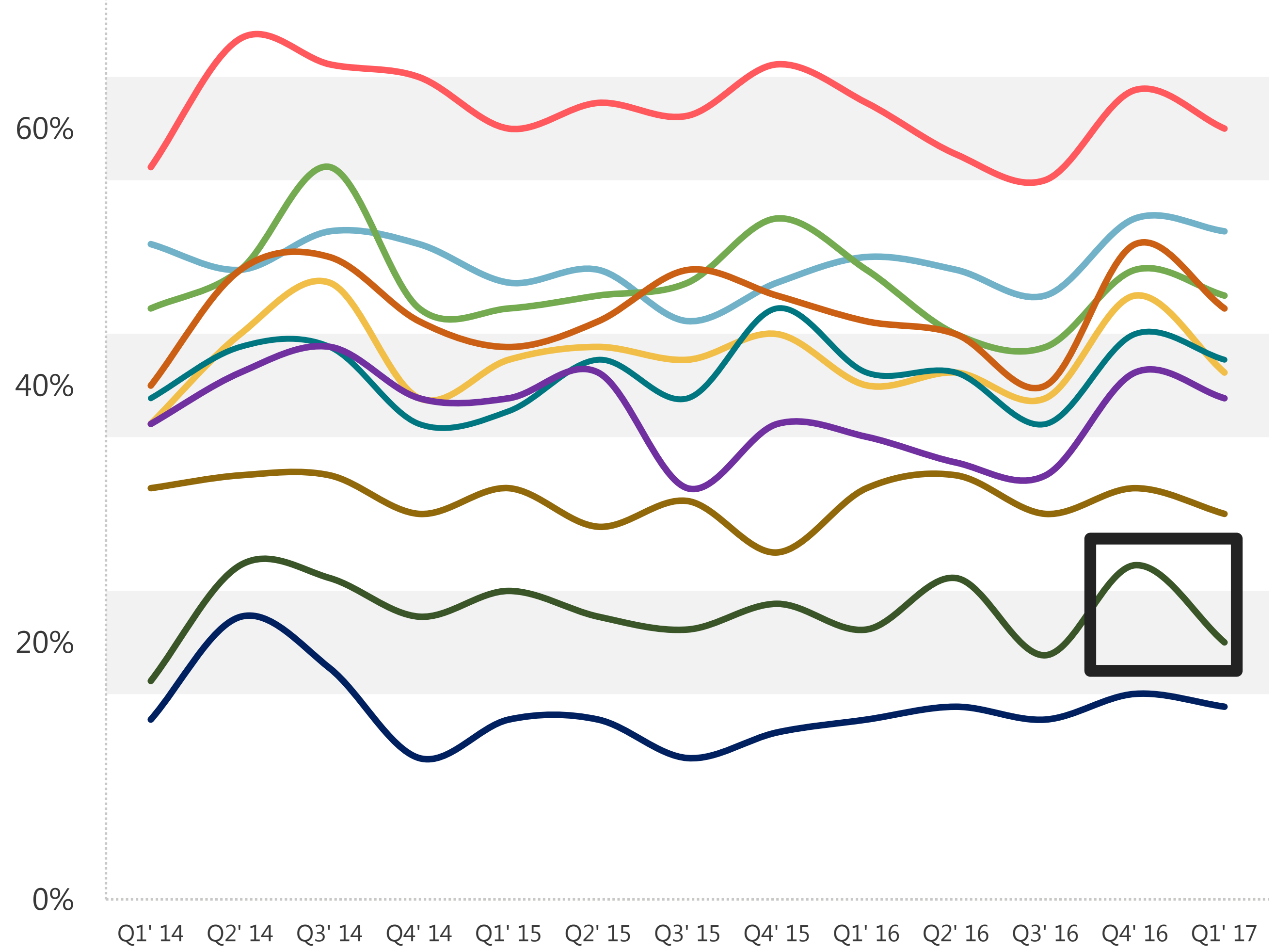
0-24% 25-49% 50-100%

Base: circa 4,000 GB adults aged 15+: Q2/ Q3/ Q4 2016/ Q1 2017

Source: Ipsos MORI

Downloading/streaming music is down quarter on quarter

USE OF TABLET IN THE PAST 3 MONTHS



60% Read or send emails

52% Browse websites for personal interests

47% Visit social networking sites

46% Online shopping

42% Online banking

41% Watch video clips on sites such as YouTube

39% Download apps for free

30% Watch catch-up TV

20% Download/stream music over the internet

15% Use the internet to make video calls (VOIP)

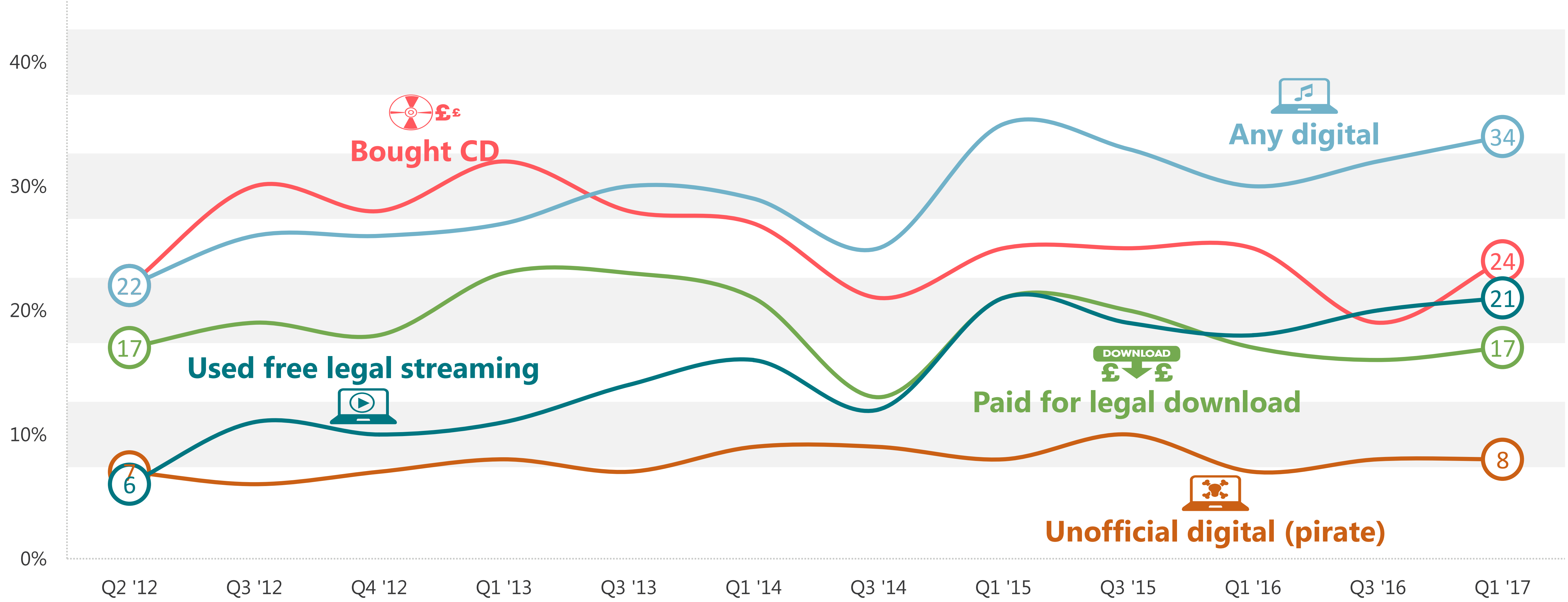
Base: circa 300-500 adults 15+ who own tablets

Source: Ipsos MORI

Content CONSUMPTION
Music / GAMES / TV / MOVIES

Buying CDs has pulled back ahead of streaming

MUSIC CONSUMPTION

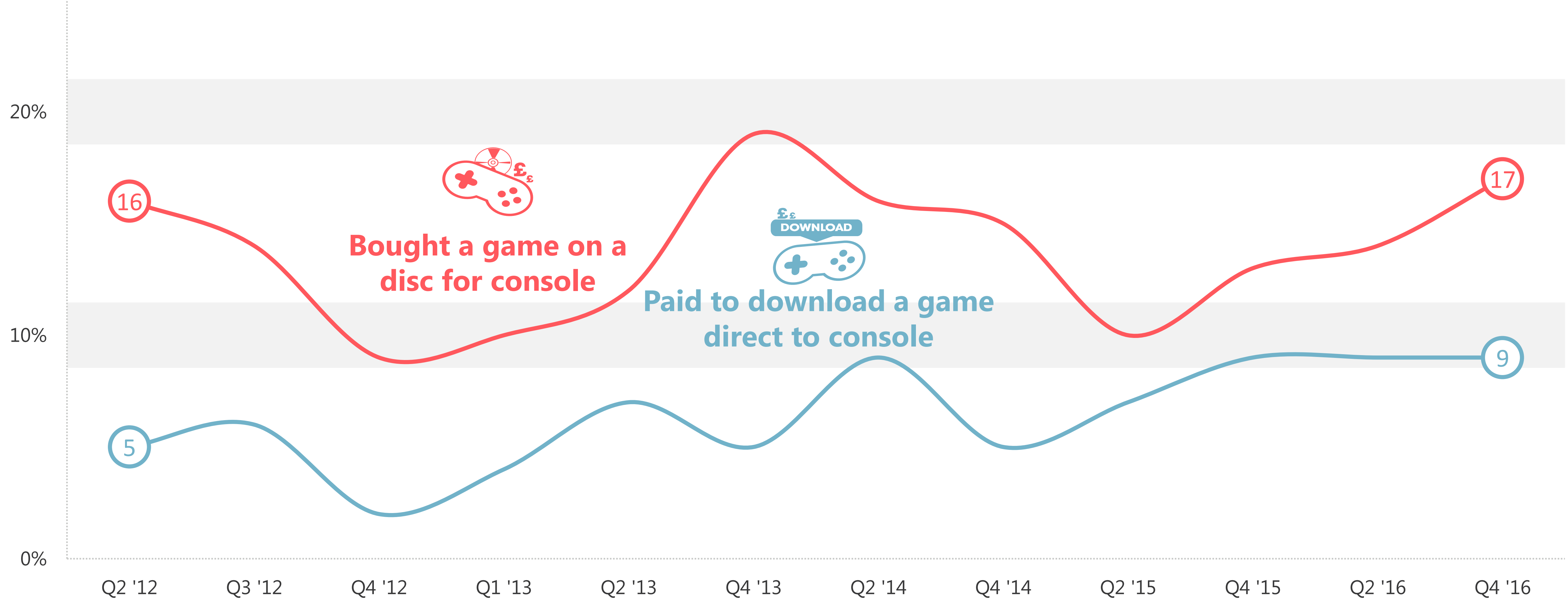


Base: circa 1,000 GB adults aged 15+ per wave / Music consumption is tracked every 6 months

Source: Ipsos MORI

Downloading games to consoles is unchanged

GAMES CONSUMPTION

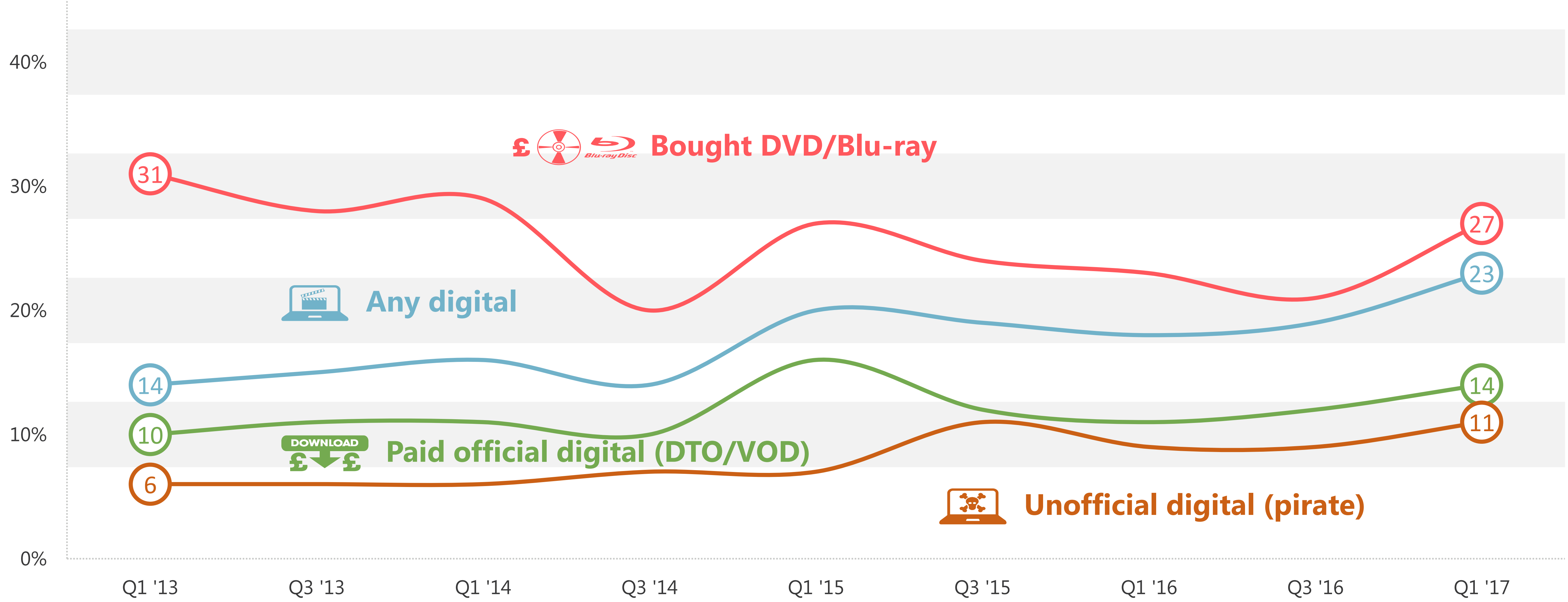


Base: circa 1,000 GB adults aged 15+ per wave / Games consumption is tracked every 6 months

Source: Ipsos MORI

Buying DVDs/Blu-ray has significantly increased

MOVIE CONSUMPTION

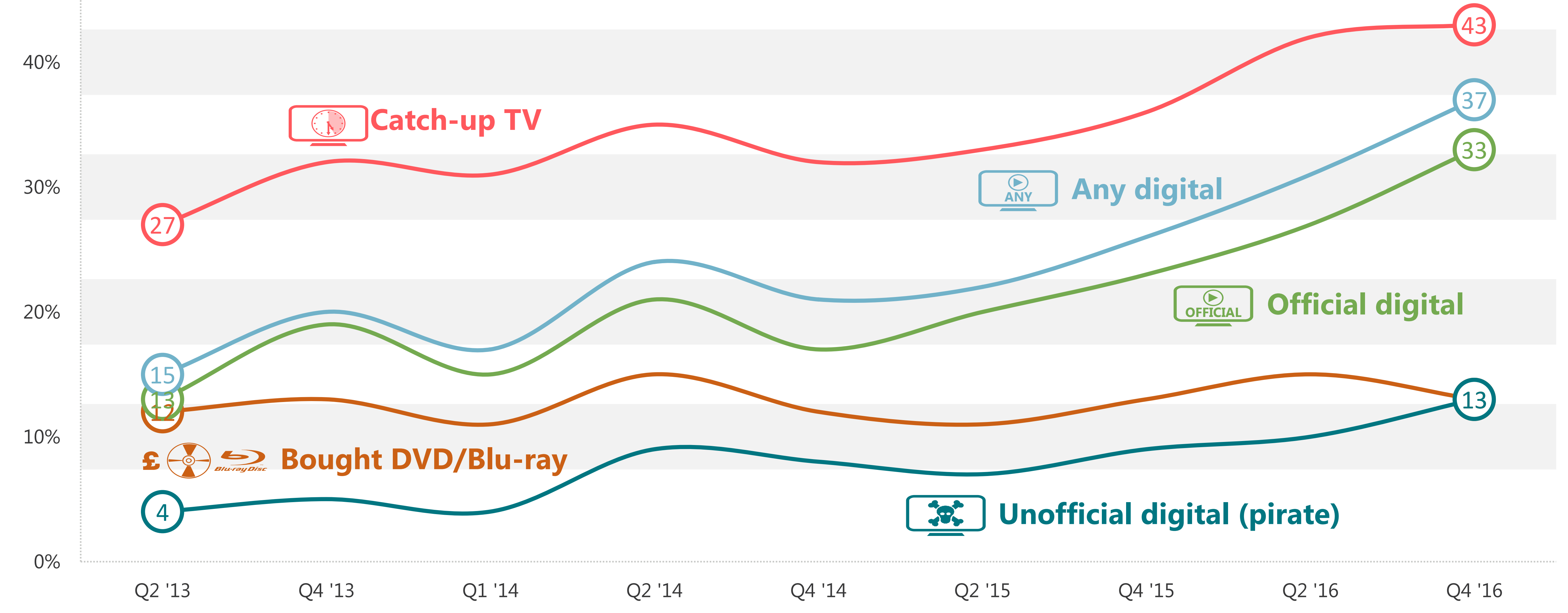


Base: circa 1,000 GB adults aged 15+ per wave / Movie consumption is tracked every 6 months

Source: Ipsos MORI

TV series consumption through unofficial channels and DVD/Blu-ray is similar

TV SERIES CONSUMPTION



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

Source: Ipsos MORI

TECH TRACKER TECHNICAL DETAILS

- Ipsos MORI interviewed a quota sample of **988 adults aged 15+ in GB**.
- The latest interviews were carried out face to face **10th February – 17th February 2017**.
- 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.

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.

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.

Ipsos Connect is a global specialised business to co-ordinate Ipsos services in the domains of Brand Communications, Advertising and Media.

As the world of brand communications, advertising and media become increasingly complex, fragmented and digitalised, 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.

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For more information

Prachi Jain
e: **Prachi.Jain@ipsos.com**

Ipsos MORI
3 Thomas More Square
London
E1W 1YW

t: +44 (0)20 3059 4792

Reece Carpenter
e: **Reece.Carpenter@ipsos.com**

Ipsos MORI
Kings House, Kymberley Road
Harrow
HA1 1PT

t: +44 (0)20 8861 8136

Eda Koray
e: **Eda.Koray@ipsos.com**

Ipsos MORI
Kings House, Kymberley Road
Harrow
HA1 1PT

t: +44 (0)20 8861 8775

Hannah Roe
e: **Hannah.Roe@ipsos.com**

Ipsos MORI
Kings House, Kymberley Road
Harrow
HA1 1PT

t: +44 (0)20 8861 8045

Ipsos Connect

www.ipsos-mori.com/ipsosconnect | @ipsosconnectuk