TECH TRACKER

QUARTERLY RELEASE:

Q3 2017

Technology Tracker

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 3 2017 (Field in July)

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

Almost 90% of GB adults claim that they have access to the internet. The proportion of adults using mobile phones to connect has been increasing steadily and is at 73% in Q3'17.

The top online activities remain: accessing emails (83%), browsing for information on personal interests (74%), researching products and services (69%), and online shopping (67%).

Smartphones

Smartphone ownership is now at 78%. iOS ownership sits at 42%, whilst Android is 35%.

The top 3 activities on smartphones are; reading or sending emails (69%), visiting social networking sites (57%), and browsing websites (50%).

Connected home

8 in 10 GB adults own a personal computer or laptop, and 7 in 10 own a laptop. Nearly 1 in 2 households own a tablet, with over half owning an iPad.

Just under 4 in 10 GB adults have a gaming console in their household. PS3/PS4 ownership has increased as Xbox continues to see a decline.

Tablets

Ownership of tablets remains fairly stable this year. The gap between ownership of iPads and non-iPad tablets has widened slightly (30% vs. 25%).

Top activities on tablet: reading or sending emails (59%), browsing websites (49%), visiting social networking sites (48%), and watching video clips (44%).

Social networking

2 in 3 people visit social media sites, with smartphones being the preferred method of access.

With a more mainstream appeal (broadly equal spread with regards to age of users), Facebook remains the most visited social networking site (61% in Q3'17) vs. Instagram (24%), Snapchat (21%), Twitter (19%), and G+(19%).

Content consumption

Music consumption via CD purchase has declined, which has contributed to the gap between CD purchase and digital consumption being at its biggest since tracking began.

However, people are more likely to buy a game for a console via a disk (18%) than they are to download a game direct to their console (10%).

INTERNET USAGE

HOW, WHEN, WHERE

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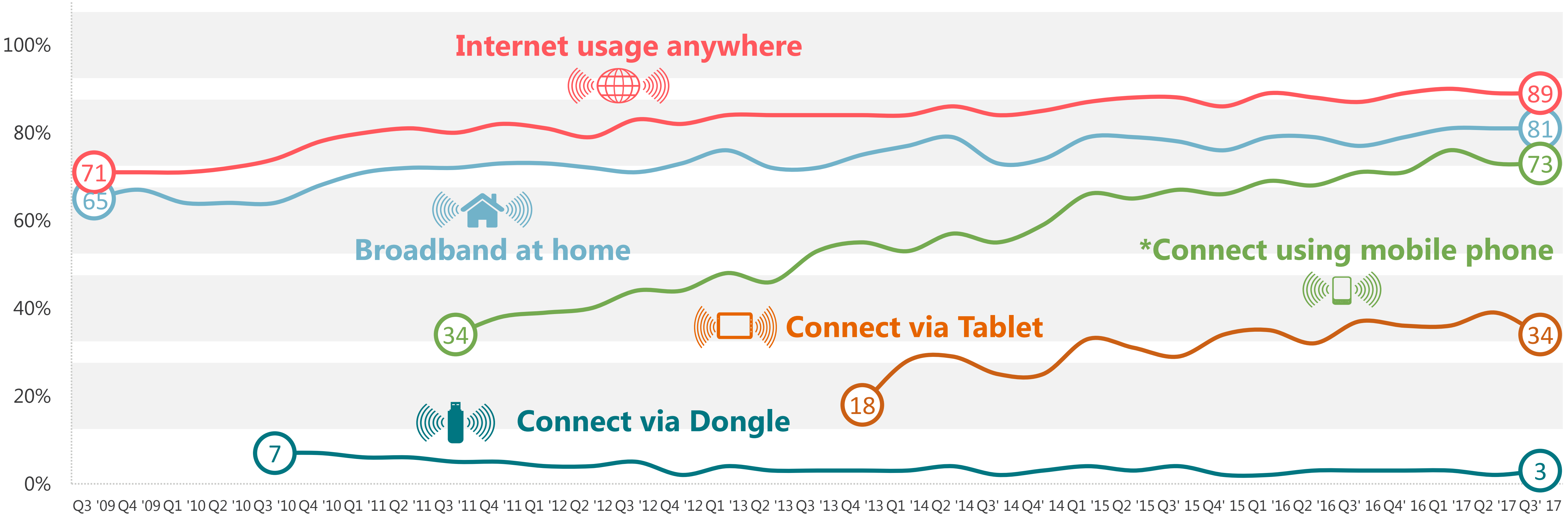
Connecting to the internet via a mobile phone continues to rise

% 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

Internet access is the lowest amongst 65+ year olds

% ACCESSING THE INTERNET BY GENDER AND SOCIAL GRADE

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	91%	99%	98%	97%	94%	90%	74%
Males AB	97%	100%	99%	100%	100%	98%	92%
Males C1	95%	99%	100%	98%	95%	96%	78%
Males C2	91%	99%	100%	98%	95%	91%	64%
Males DE	81%	97%	94%	91%	82%	75%	49%
Females	87%	100%	98%	98%	94%	92%	57%
Females AB	95%	100%	100%	100%	99%	97%	82%
Females C1	91%	100%	100%	99%	98%	96%	64%
Females C2	84%	100%	100%	98%	89%	83%	44%
Females DE	77%	99%	93%	95%	86%	87%	34%

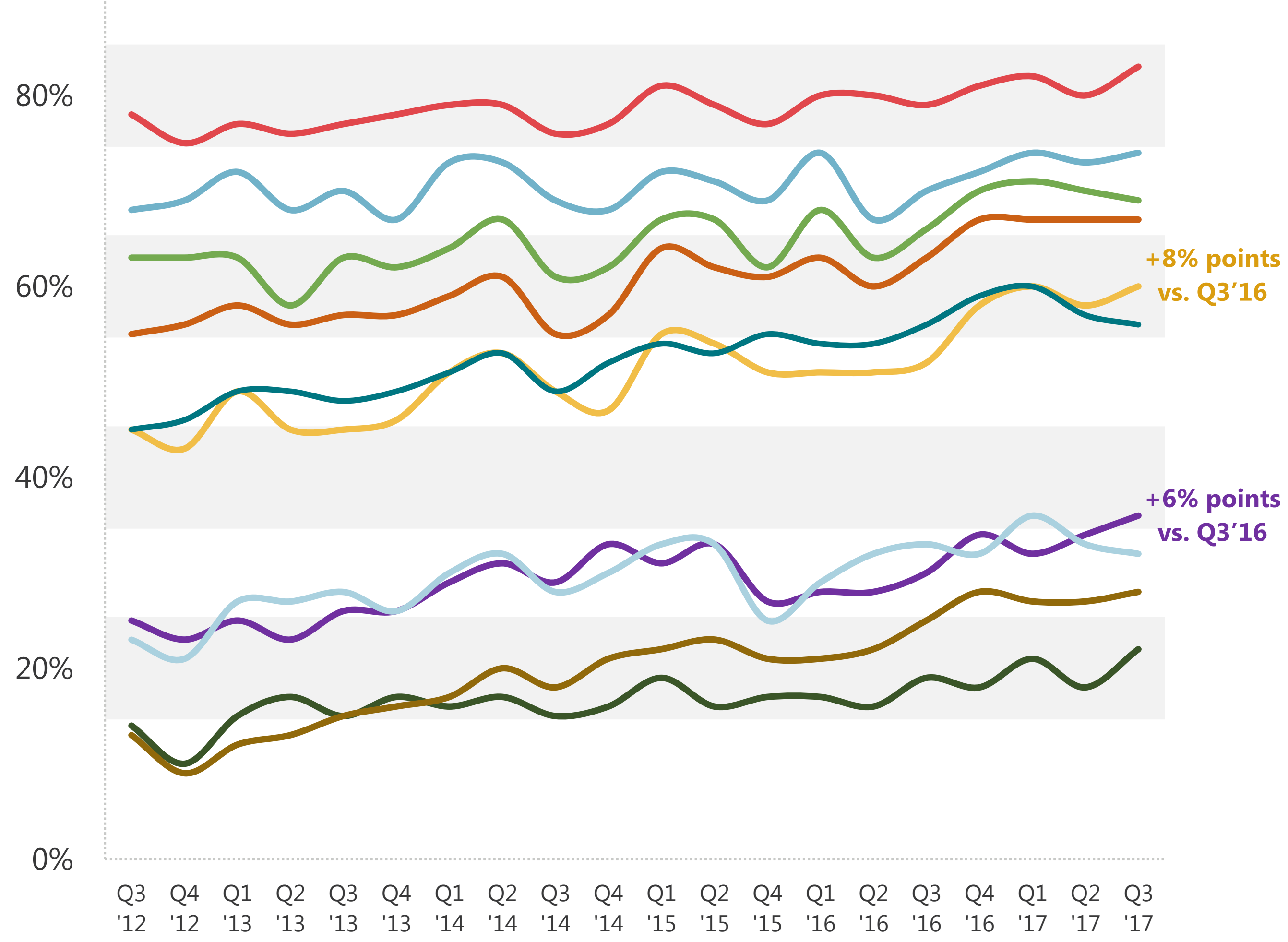
0-49%   50-79%   80-100%

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

Source: Ipsos MORI

Checking finances and streaming music has the highest growth year on year

% USE OF THE INTERNET IN THE PAST 3 MONTHS



83%	Emails
74%	Visit sites for info on personal interests
69%	Visit sites for info on products thinking of buying
67%	Visit sites to buy products online
60%	Check bank account/ other financial holdings
56%	Social networking
36%	Download/ stream music
32%	Download/ stream TV
28%	Download/ stream movies
22%	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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Device ownership remains stable vs. this time last year

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

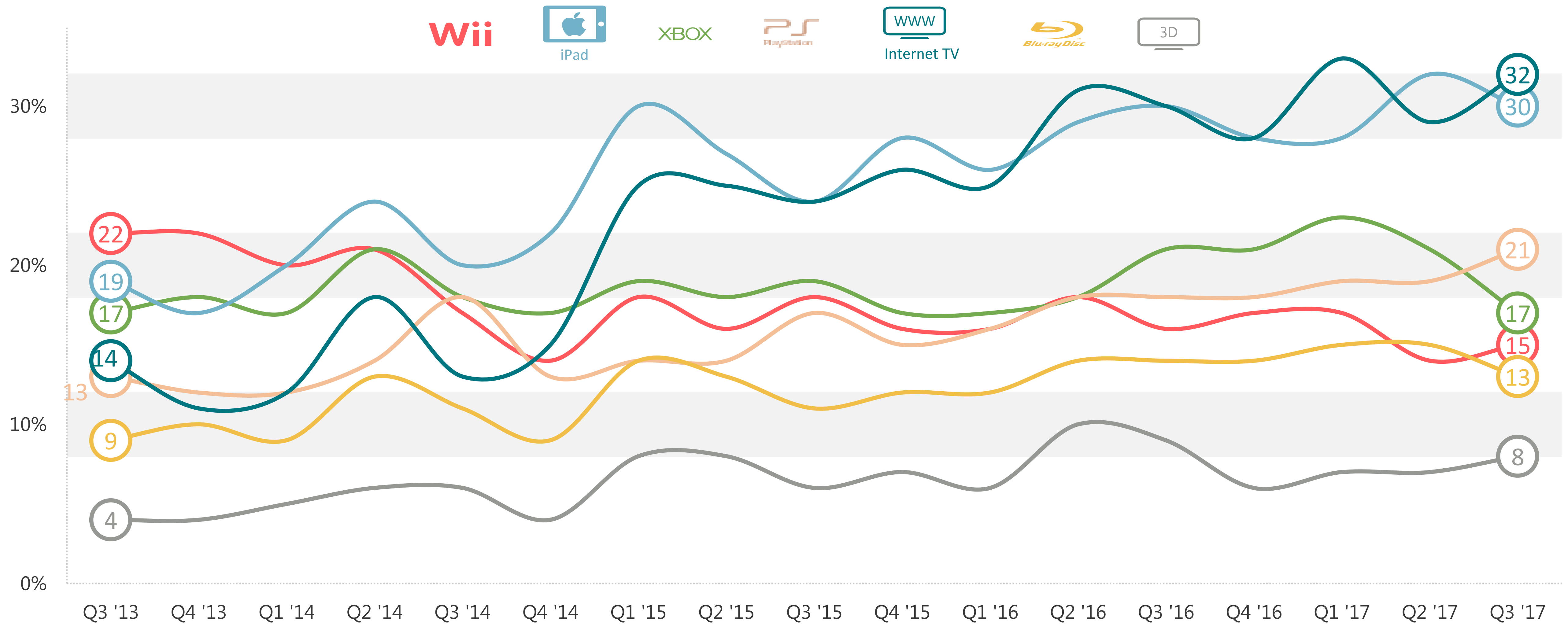
Base: circa 1,000 GB adults aged 15+: Quarter 3 2017

Source: Ipsos MORI

Ipsos Connect

Xbox ownership has fallen, as PS3/4 possession increases

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



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

Source: Ipsos MORI

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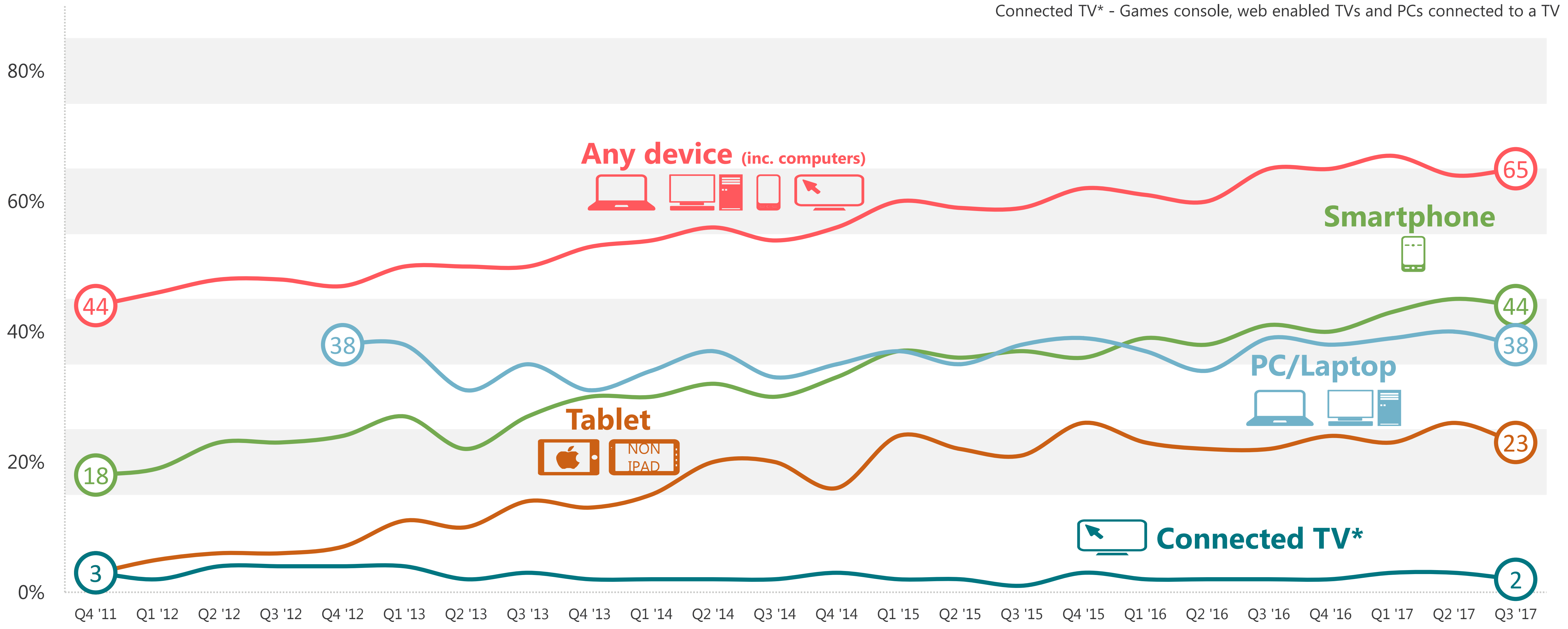
SOCIAL NETWORKING

Smartphones remain most popular device for social networking

% VISITING SOCIAL NETWORKING SITES

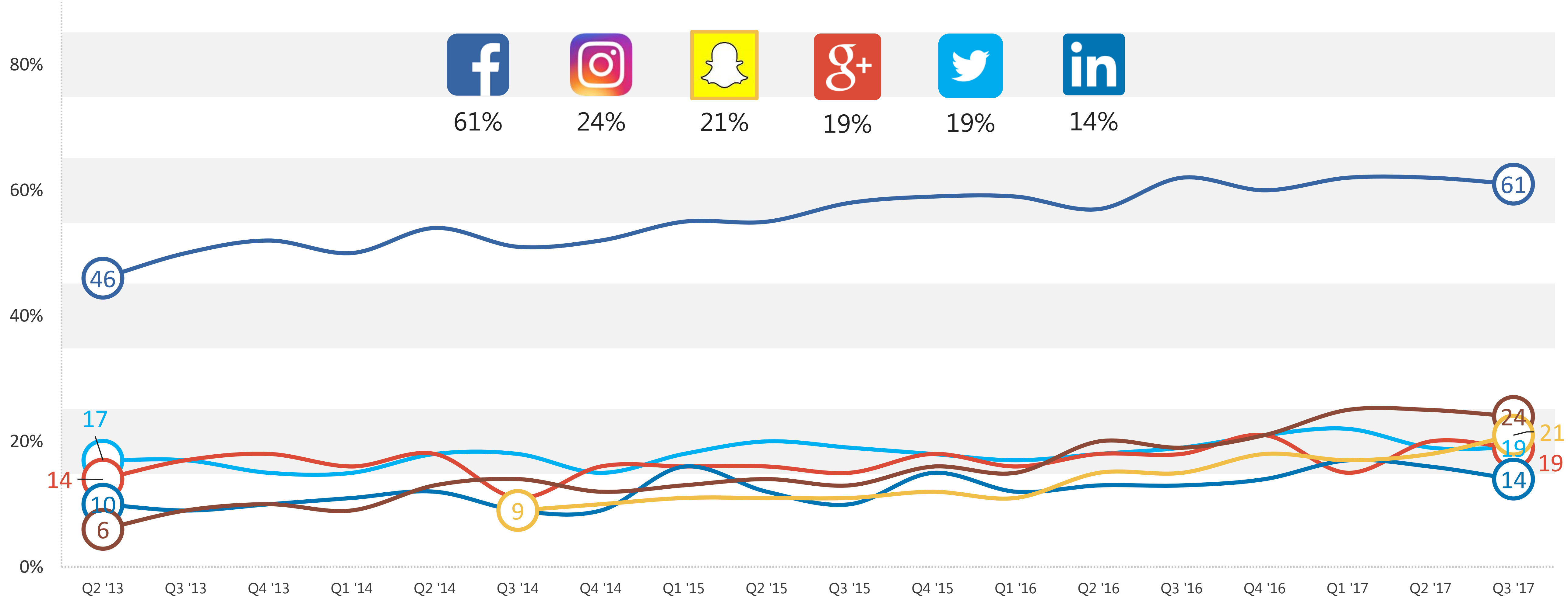


Base: circa 1,000 GB adults aged 15+ per wave

Source: Ipsos MORI

Facebook is the most visited social network

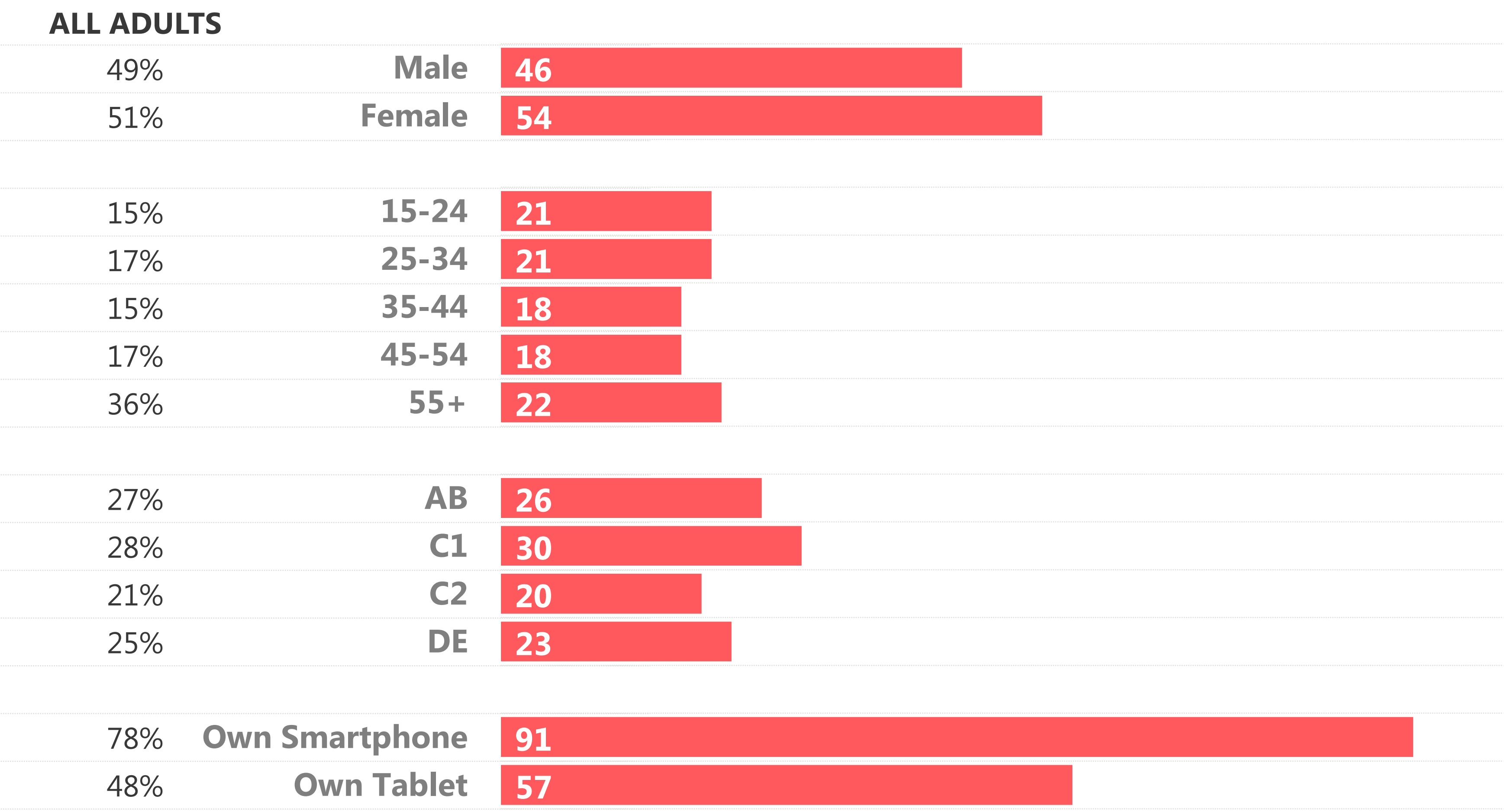
% VISITED IN LAST 3 MONTHS



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

Source: Ipsos MORI

Profile of Facebook users is evenly spread across age groups, gender, and social grade



The profile of Facebook users continues to be evenly spread across age groups, with the proportion of users aged 55+ matching that of 15-24s and 25-34s.

Smartphone and Tablet ownership is higher amongst Facebook users in comparison to the GB adult population, with 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 (604) Q3 2017

Source: Ipsos MORI

Facebook usage is skewed towards the young and is more prevalent in females within the 25-64 age range

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

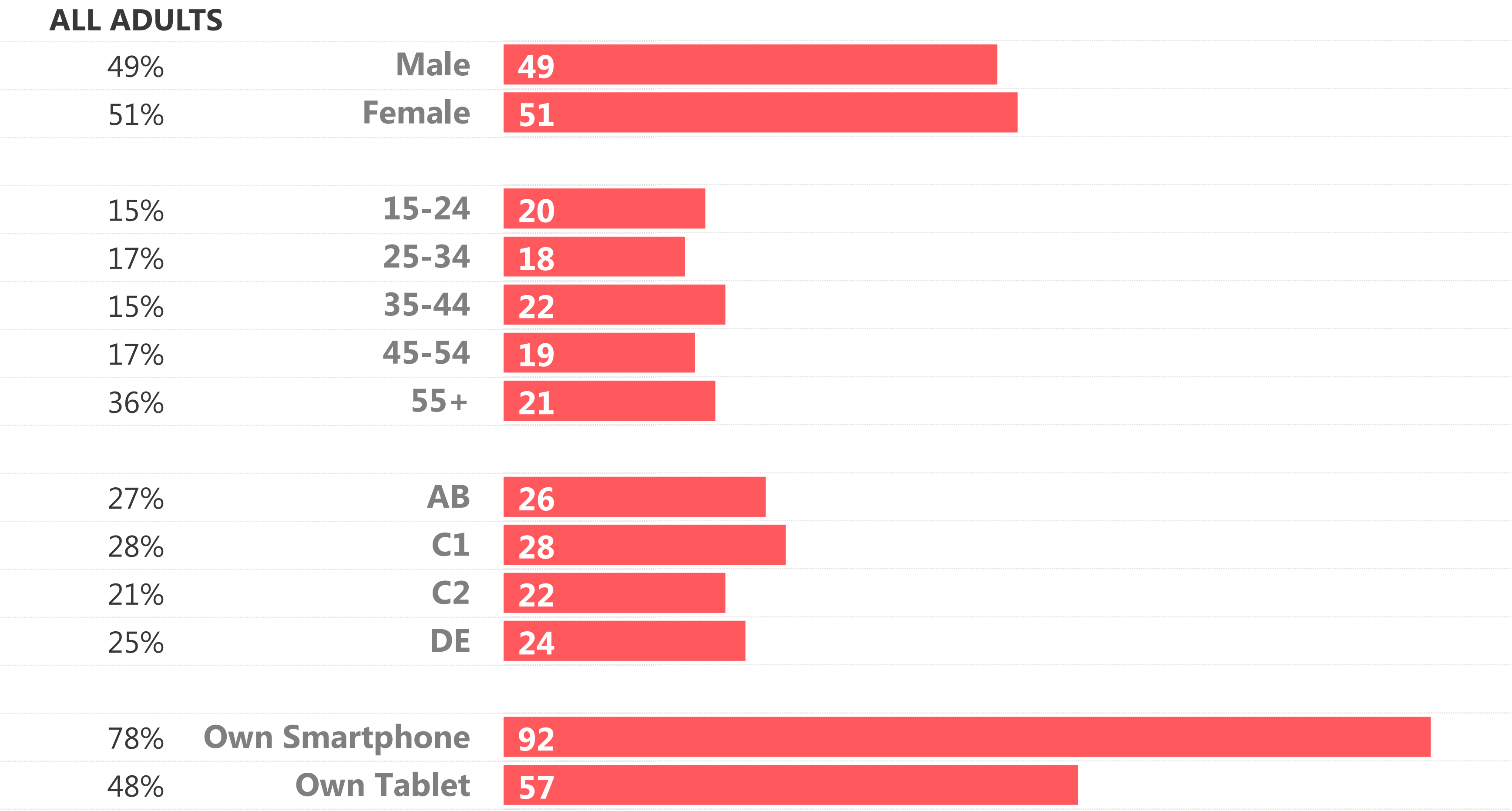
	All	15-24	25-34	35-44	45-54	55-64	65+
Males	59%	84%	79%	67%	61%	44%	25%
Males AB	58%	88%	79%	72%	67%	42%	33%
Males C1	68%	88%	87%	72%	67%	55%	25%
Males C2	57%	83%	76%	68%	49%	46%	22%
Males DE	52%	80%	70%	55%	54%	36%	17%
Females	64%	85%	86%	80%	67%	59%	25%
Females AB	66%	80%	93%	83%	72%	62%	32%
Females C1	68%	90%	88%	80%	68%	61%	33%
Females C2	64%	88%	87%	85%	66%	57%	15%
Females DE	57%	79%	79%	72%	60%	57%	17%

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

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

Source: Ipsos MORI

Google+ users are just as likely to be 55+ as they are 15-24s



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.

Base: circa GB adults (1,000) / All visiting / using Google+ in last 3 months (179) Q3 2017

Source: Ipsos MORI

Overall there is low usage of Google+ across demographics

% 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%	24%	21%	24%	22%	17%	10%
Males AB	21%	25%	26%	21%	28%	22%	11%
Males C1	22%	28%	21%	21%	28%	25%	7%
Males C2	19%	22%	22%	29%	18%	16%	7%
Males DE	15%	20%	16%	25%	8%	5%	13%
Females	18%	31%	22%	25%	20%	13%	7%
Females AB	16%	29%	16%	20%	20%	16%	6%
Females C1	18%	29%	20%	24%	13%	13%	8%
Females C2	20%	31%	19%	42%	22%	2%	11%
Females DE	20%	33%	29%	24%	23%	16%	4%

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

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

Source: Ipsos MORI

Twitter usage is driven by males and those aged 15-24

ALL ADULTS		
49%	Male	57
51%	Female	43
15%	15-24	28
17%	25-34	19
15%	35-44	24
17%	45-54	14
36%	55+	15
27%	AB	36
28%	C1	35
21%	C2	16
25%	DE	13
78%	Own Smartphone	98
48%	Own Tablet	66

Twitter users are more likely to be younger than the wider GB population.

As the preferred mode of social media 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 (186) Q3 2017

Source: Ipsos MORI

AB males aged between 15-24 and 35-44, have the highest usage of Twitter

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

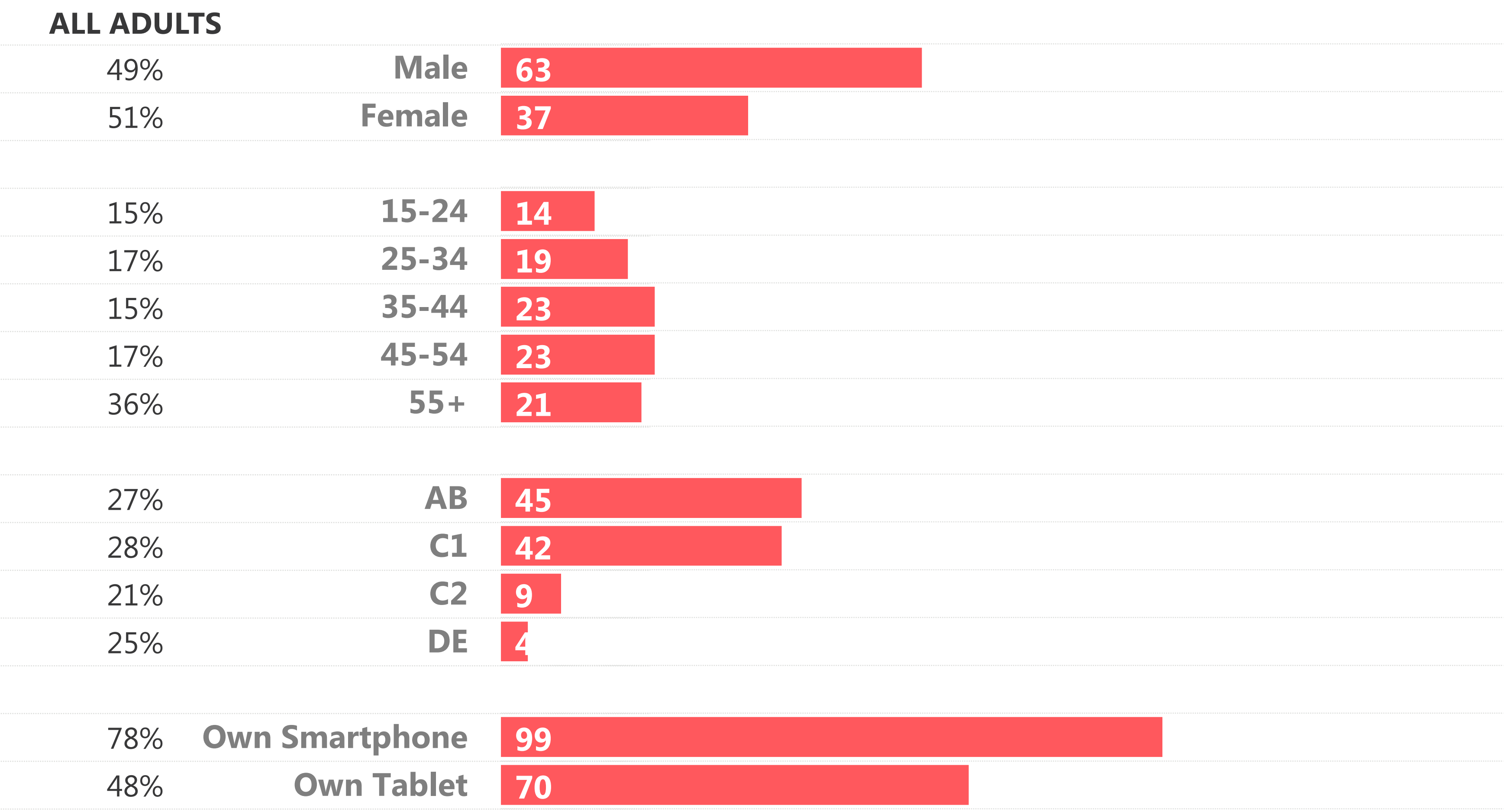
	All	15-24	25-34	35-44	45-54	55-64	65+
Males	23%	39%	31%	32%	19%	15%	4%
Males AB	28%	59%	38%	53%	23%	21%	9%
Males C1	30%	44%	43%	34%	24%	19%	3%
Males C2	16%	27%	18%	25%	14%	12%	2%
Males DE	15%	33%	23%	14%	10%	6%	0%
Females	18%	37%	18%	23%	20%	13%	3%
Females AB	25%	45%	35%	32%	30%	22%	5%
Females C1	20%	44%	22%	24%	17%	15%	3%
Females C2	13%	29%	11%	12%	21%	4%	1%
Females DE	11%	30%	9%	16%	11%	5%	2%

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

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

Source: Ipsos MORI

LinkedIn users are more likely to be males and ABC1 than other social media platform users



The profile of LinkedIn users are geared towards a certain demographic – more so than other social media sites.

Almost half of LinkedIn users are AB, whilst over 3 in 5 are male. Users are also more likely to be 45+ than other social media sites.

Base: circa GB adults (1,000) / All visiting / using LinkedIn in last 3 months (140) Q3 2017

Source: Ipsos MORI

AB males aged 35-44 are the most likely demographic to access LinkedIn

% 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	19%	16%	24%	25%	25%	19%	5%
Males AB	34%	31%	40%	56%	41%	38%	11%
Males C1	27%	25%	37%	32%	34%	20%	4%
Males C2	7%	8%	10%	4%	9%	7%	4%
Males DE	3%	7%	3%	3%	1%	1%	0%
Females	12%	14%	16%	20%	15%	11%	2%
Females AB	23%	24%	46%	28%	27%	21%	5%
Females C1	15%	17%	18%	24%	24%	10%	1%
Females C2	6%	6%	6%	13%	4%	8%	1%
Females DE	4%	10%	3%	7%	2%	1%	0%

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

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

Source: Ipsos MORI

Instagram is most popular amongst females and 15-24 year olds

ALL ADULTS		
49%	Male	44
51%	Female	56
15%	15-24	34
17%	25-34	29
15%	35-44	22
17%	45-54	10
36%	55+	6
27%	AB	27
28%	C1	31
21%	C2	20
25%	DE	21
78%	Own Smartphone	99
48%	Own Tablet	61

A third of all Instagram users are aged 15-24, with 6 in 10 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 (233) Q3 2017

Source: Ipsos MORI

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Two thirds of 15-24 years old females have used Instagram in the past 3 months

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

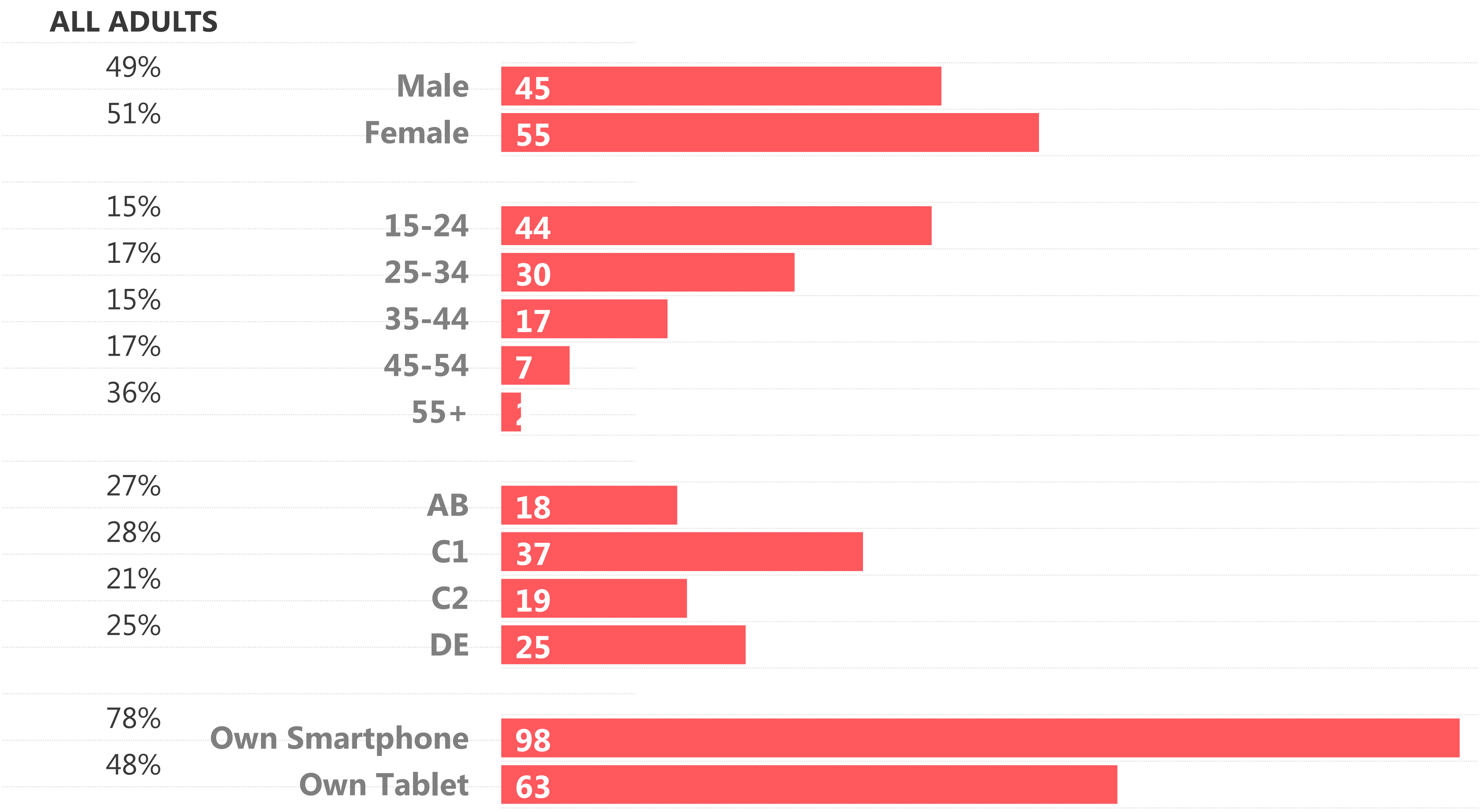
	All	15-24	25-34	35-44	45-54	55-64	65+
Males	21%	50%	39%	22%	12%	6%	2%
Males AB	18%	65%	35%	30%	12%	7%	2%
Males C1	27%	56%	41%	21%	16%	12%	2%
Males C2	22%	42%	39%	27%	14%	6%	2%
Males DE	17%	44%	41%	8%	4%	1%	0%
Females	26%	66%	40%	31%	21%	10%	1%
Females AB	28%	70%	58%	39%	24%	18%	2%
Females C1	29%	68%	46%	30%	21%	10%	1%
Females C2	22%	56%	30%	29%	19%	1%	0%
Females DE	24%	70%	32%	23%	22%	4%	2%

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

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

Source: Ipsos MORI

As with Instagram, Snapchat users are predominantly female, but the audience tends to be even younger



Nearly half of all Snapchat users are aged 15-24 and over half are ABC1.

Snapchat functionality also lends itself to almost universal Smartphone ownership.

Base: circa GB adults (1,000) / All visiting / using Snapchat in last 3 months (199) Q3 2017

Source: Ipsos MORI

7 in 10 females aged 15-24 are Snapchat users

% 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	16%	57%	21%	12%	8%	3%	1%
Males AB	13%	69%	17%	9%	14%	4%	1%
Males C1	23%	72%	27%	12%	4%	5%	1%
Males C2	12%	33%	16%	13%	6%	2%	1%
Males DE	17%	54%	23%	12%	5%	0%	0%
Females	20%	68%	33%	20%	11%	2%	0%
Females AB	14%	45%	26%	21%	11%	4%	0%
Females C1	23%	71%	39%	14%	11%	2%	0%
Females C2	22%	74%	32%	23%	9%	0%	0%
Females DE	22%	71%	33%	24%	11%	2%	0%

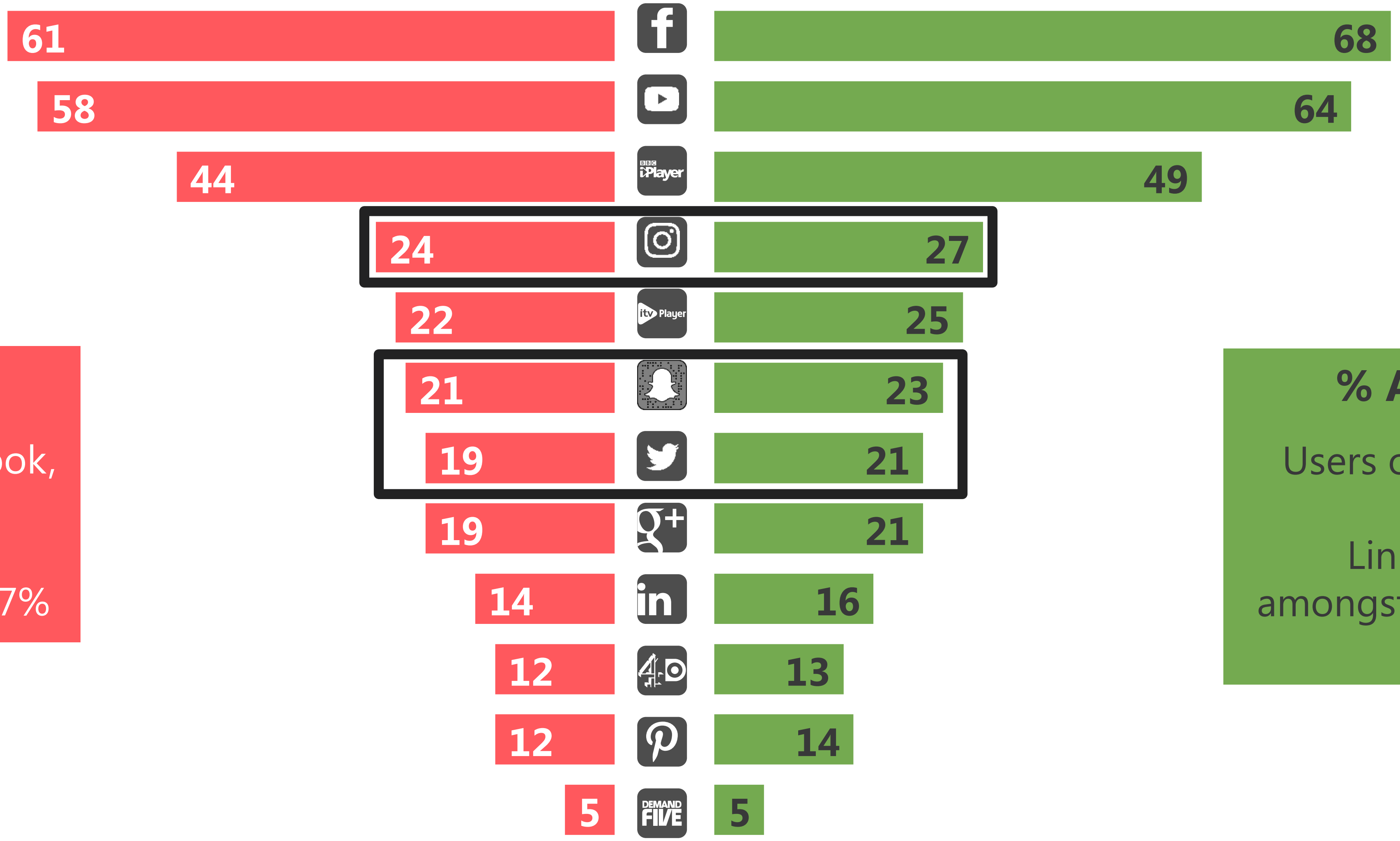
0-24% 25-49% 50-100%

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

Source: Ipsos MORI

Despite being relatively new, Instagram and Snapchat attract more visitors than Twitter

% VISITED IN LAST 3 MONTHS



% All adults

Users of either Facebook, Instagram, Twitter, LinkedIn, or Snapchat amongst all adults - 67%

% All online adults

Users of either Facebook, Instagram, Twitter, LinkedIn, or Snapchat amongst all online adults - 74%

Base: circa GB adults 1,000 adults aged 15+: Q3 2017

Base: 881 GB online adults aged 15+: Q3 2017

Source: Ipsos MORI

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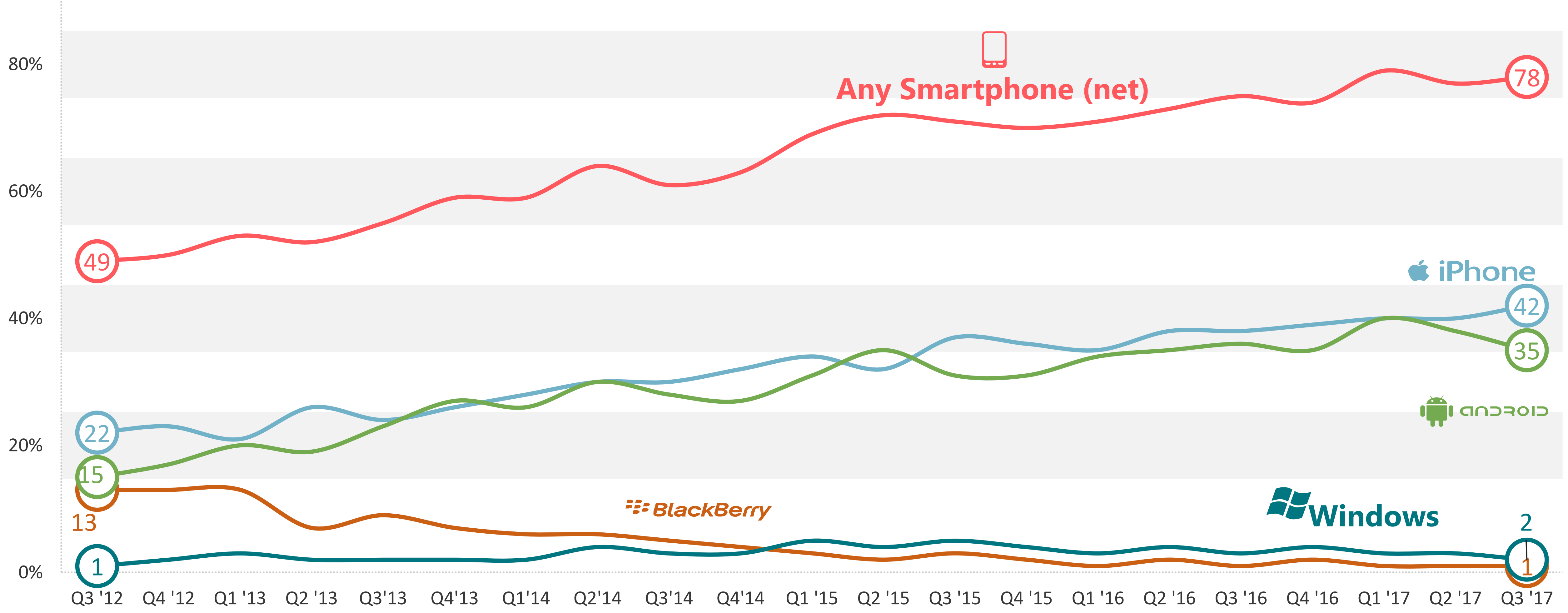
SMARTPHONE OWNERSHIP

Over three quarters of GB adults have a smartphone

% OWN BY MANUFACTURER



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

Source: Ipsos MORI

Lower usage of smartphone amongst 65+ year olds

% OWN A SMARTPHONE BY GENDER AND SOCIAL GRADE

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	80%	96%	95%	90%	87%	75%	43%
Males AB	84%	98%	96%	96%	98%	86%	55%
Males C1	84%	98%	96%	91%	85%	82%	45%
Males C2	80%	97%	100%	92%	83%	76%	36%
Males DE	68%	94%	84%	81%	75%	52%	27%
Females	75%	95%	94%	93%	82%	74%	31%
Females AB	84%	94%	100%	99%	93%	90%	51%
Females C1	77%	95%	93%	93%	86%	76%	36%
Females C2	75%	95%	99%	93%	86%	76%	14%
Females DE	62%	95%	86%	86%	64%	48%	19%

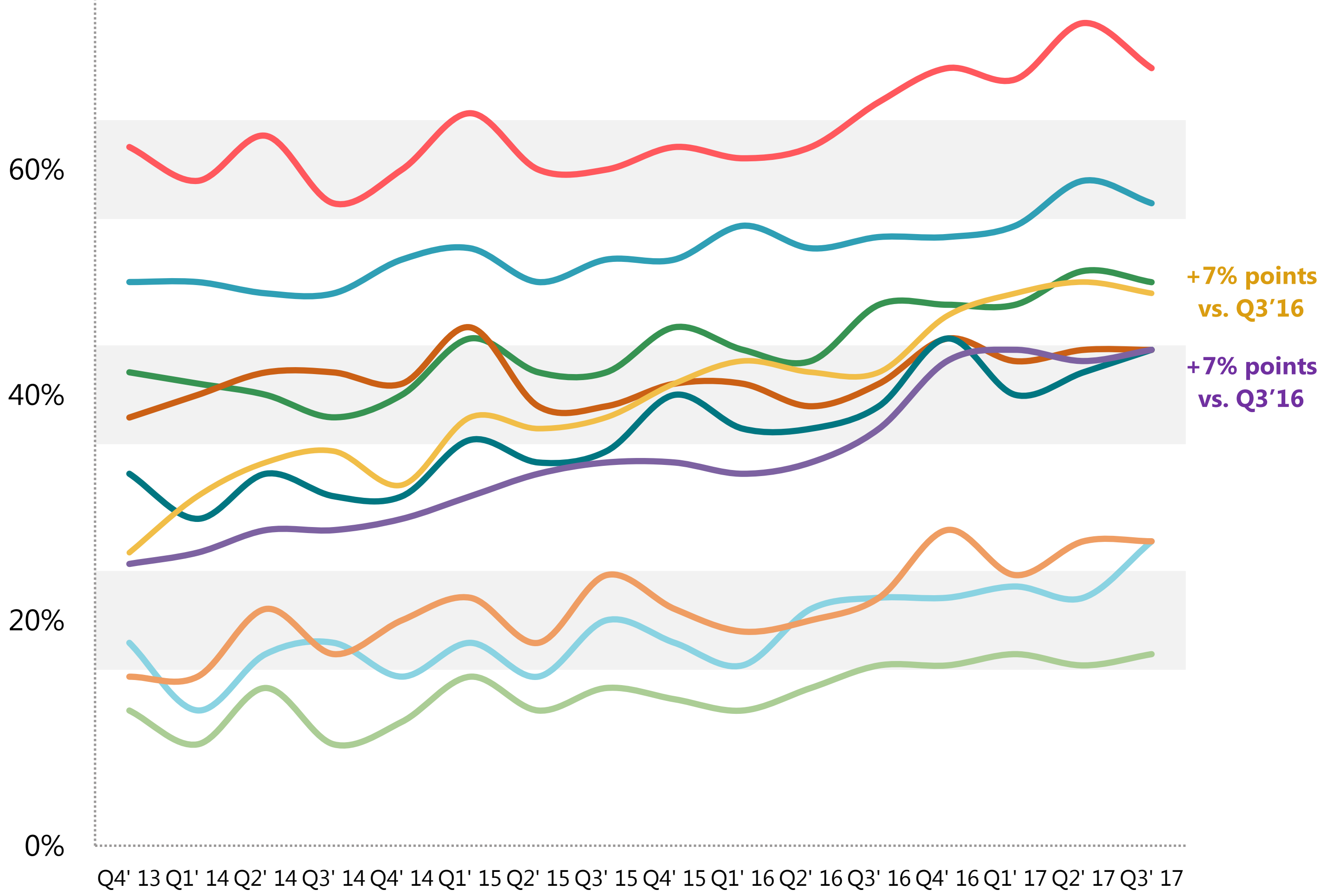
0-24% 25-49% 50-100%

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

Source: Ipsos MORI

Online banking and shopping witness the highest growth on a year to year basis

USE OF SMARTPHONE IN THE PAST 3 MONTHS



69% Read or send emails

57% Visit social networking sites

50% Browse websites for personal interests

49% Online banking

44% Download apps for free

44% Watch video clips on sites such as YouTube

44% Online shopping

27% Use instant messaging services such as BBM

27% Download/ stream music over the internet

17% Watch catch-up TV

Base: circa 500-750 smartphone owners per wave

Source: Ipsos MORI

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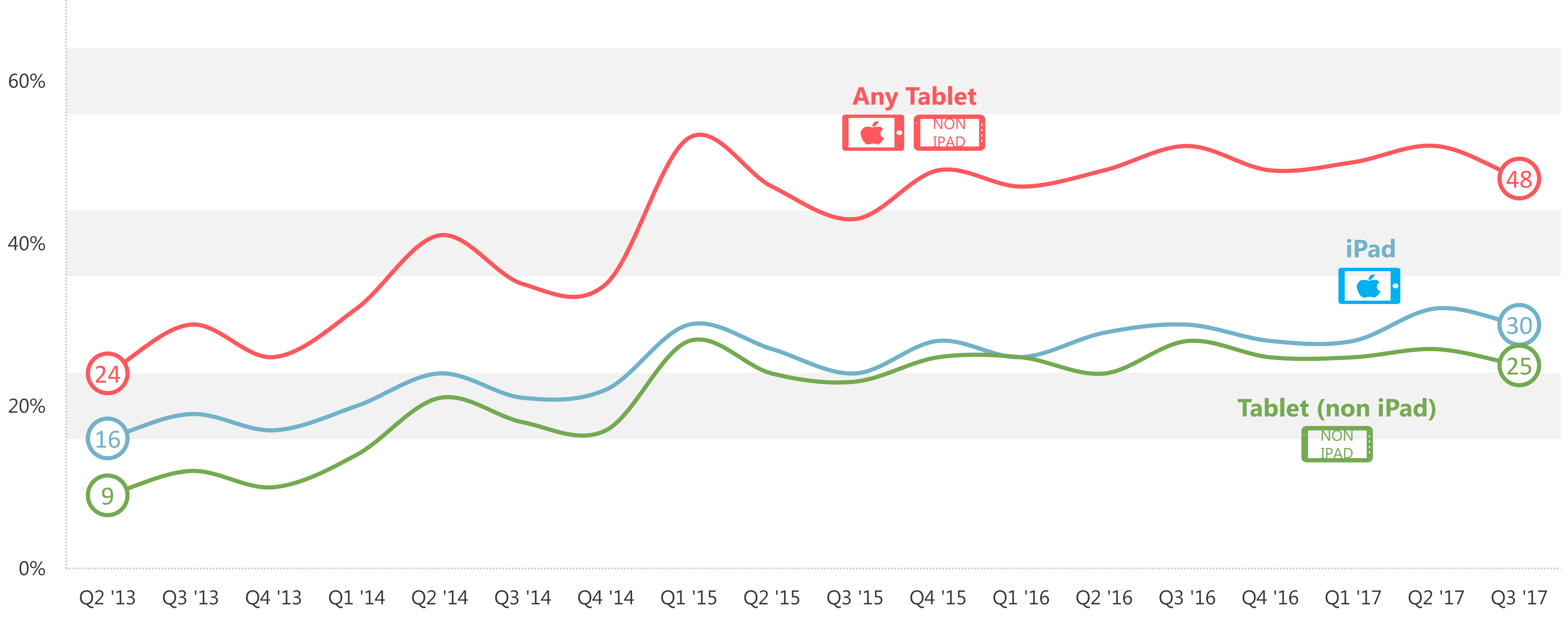
TABLET OWNERSHIP

Overall tablet ownership remains broadly stable this year

% OWN A TABLET IN THE HOUSEHOLD



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

Source: Ipsos MORI

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Tablet ownership is correlated with higher social grade

% OWN A TABLET BY GENDER AND SOCIAL GRADE

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	49%	43%	42%	59%	58%	53%	41%
Males AB	65%	58%	48%	65%	79%	72%	58%
Males C1	51%	47%	45%	66%	50%	61%	43%
Males C2	43%	39%	40%	53%	50%	46%	35%
Males DE	33%	35%	34%	50%	38%	28%	16%
Females	51%	57%	51%	62%	59%	54%	32%
Females AB	64%	74%	53%	74%	70%	69%	50%
Females C1	52%	64%	50%	64%	64%	53%	30%
Females C2	51%	46%	60%	70%	60%	55%	25%
Females DE	36%	50%	43%	39%	39%	33%	22%

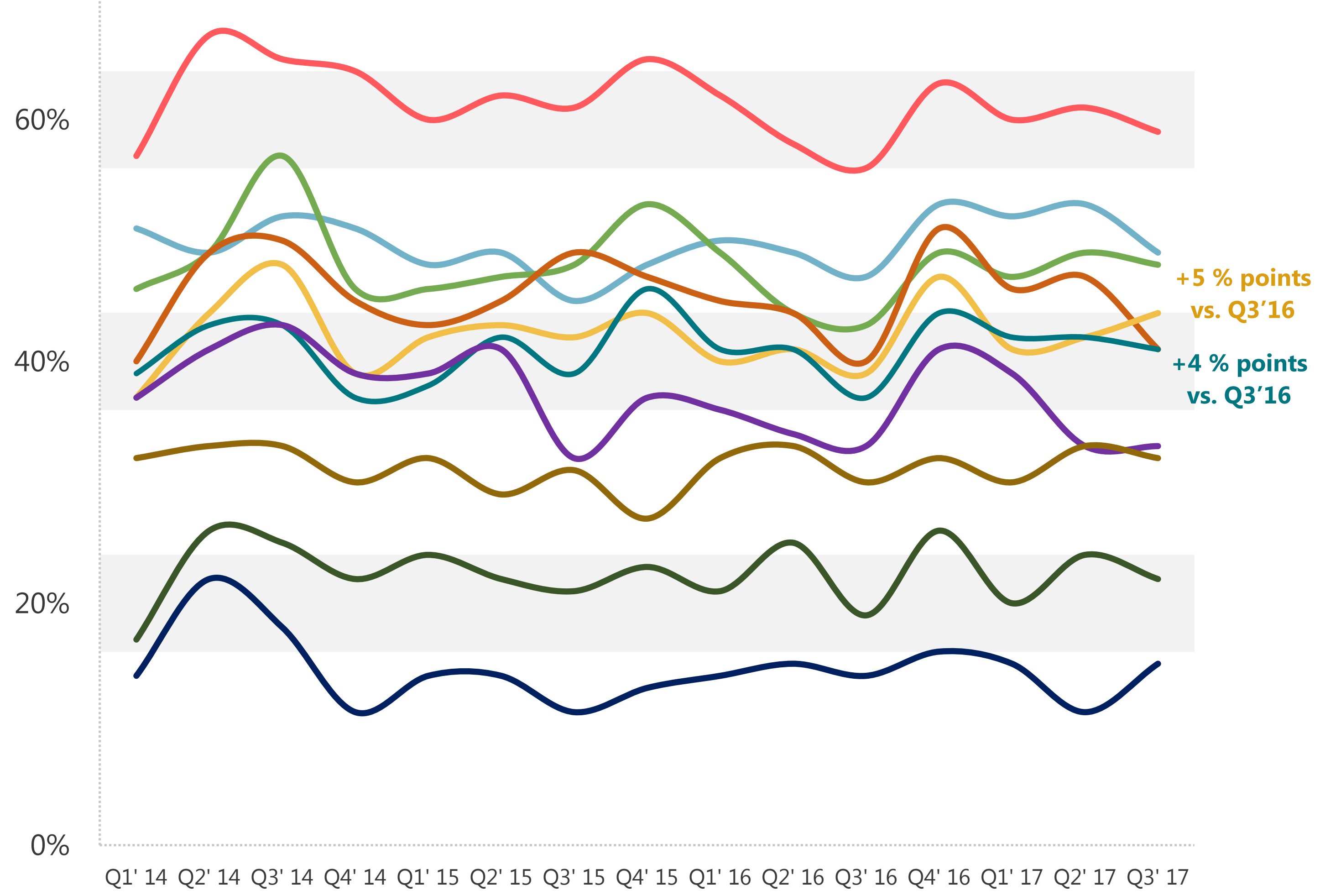
0-24% 25-49% 50-100%

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

Source: Ipsos MORI

Online banking and watching video clips have the highest growth year-on-year

USE OF TABLET IN THE PAST 3 MONTHS



59% Read or send emails
49% Browse websites for personal interests
48% Visit social networking sites
44% Watch video clips on sites such as YouTube
41% Online shopping
41% Online banking
33% Download apps for free
32% Watch catch-up TV
22% 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

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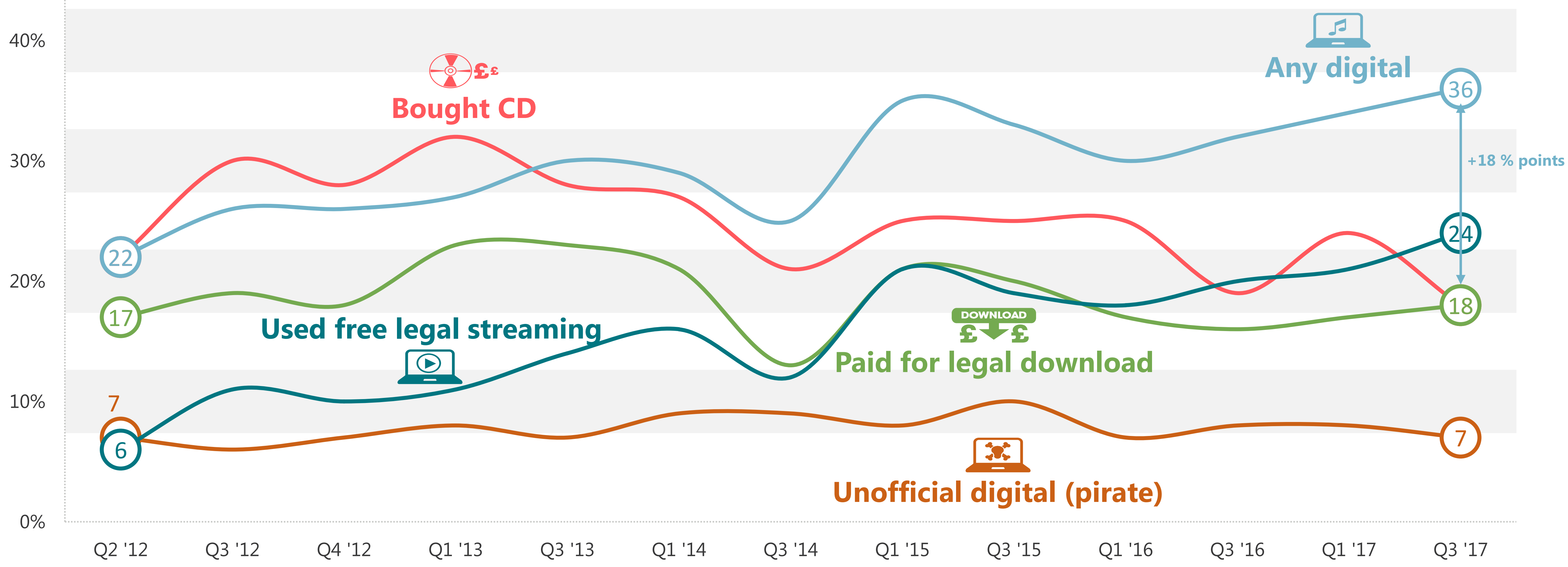
CONTENT CONSUMPTION
MUSIC / GAMES / TV / MOVIES

The gap between digital vs. CD music consumption is highest since records began (18% points)

MUSIC CONSUMPTION

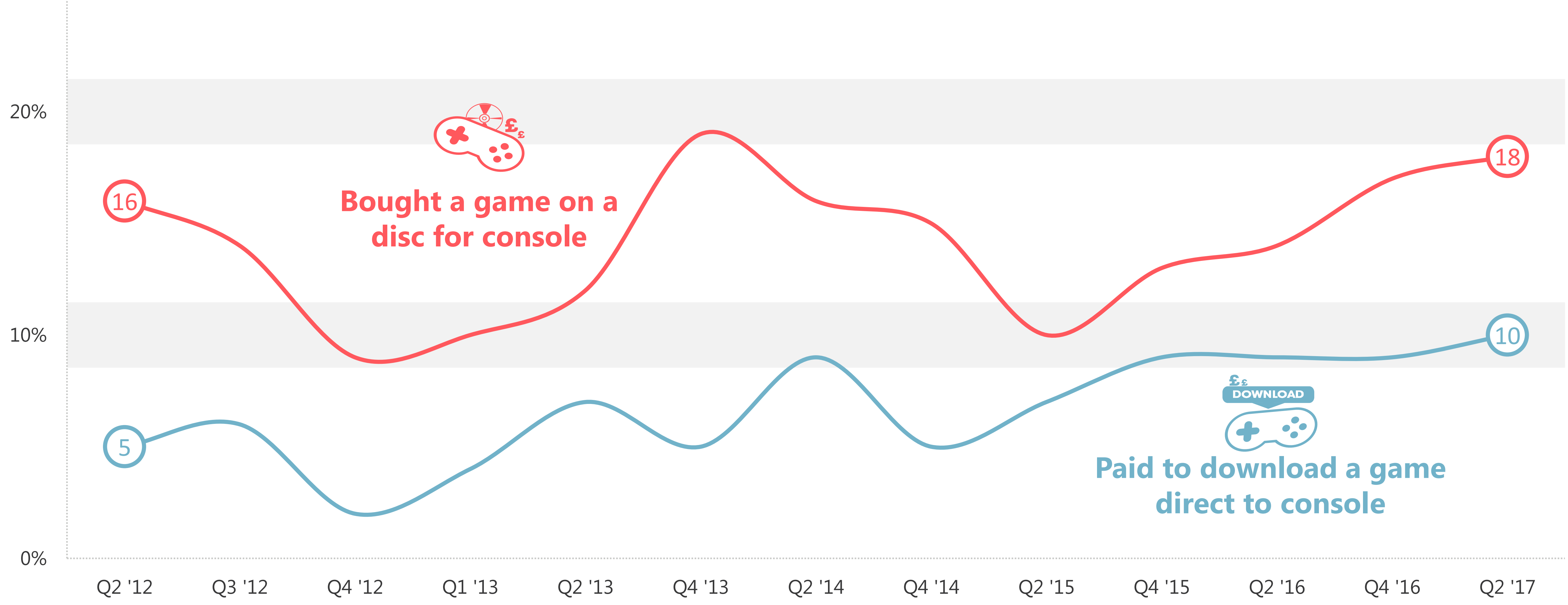


Base: circa 1,000 GB adults aged 15+ per wave / Music consumption is tracked every 6 months

Source: Ipsos MORI

Buying games on a disc remains more popular than paying for a direct download

GAMES CONSUMPTION

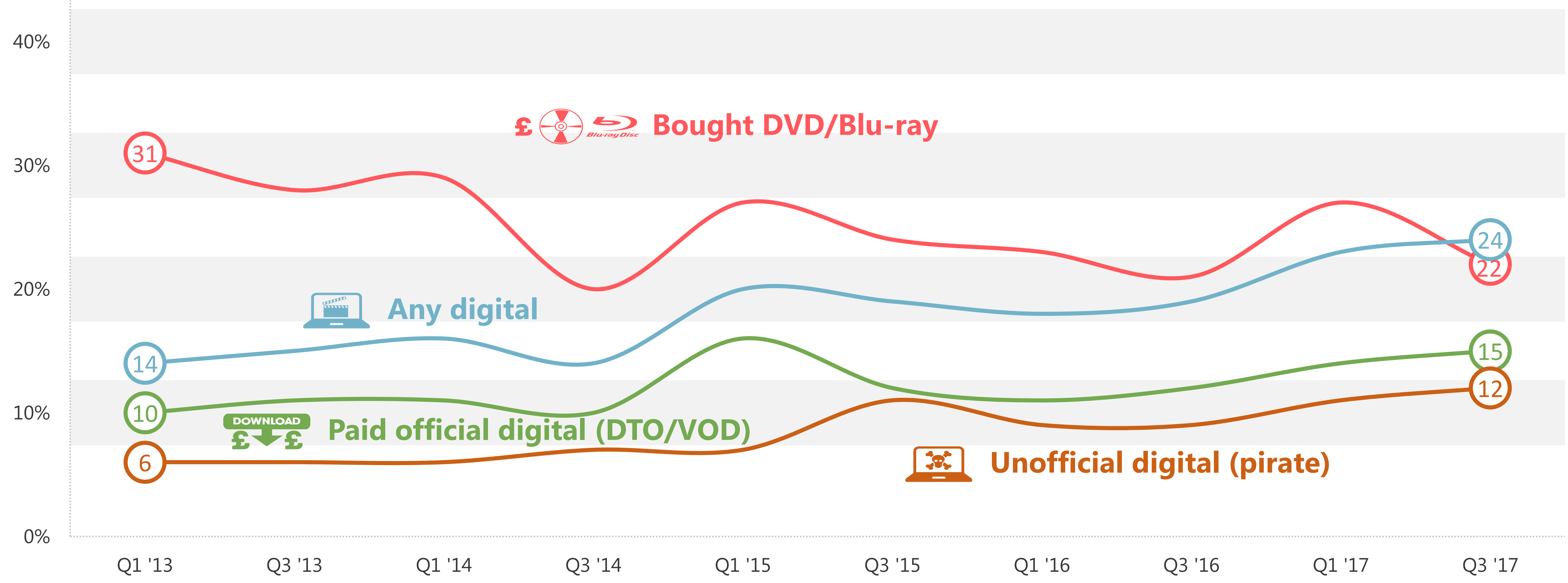


Base: circa 1,000 GB adults aged 15+ per wave / Games consumption is tracked every 6 months

Source: Ipsos MORI

Digital movie consumption continues to grow and is on a par with DVD/Blu-ray

MOVIE CONSUMPTION

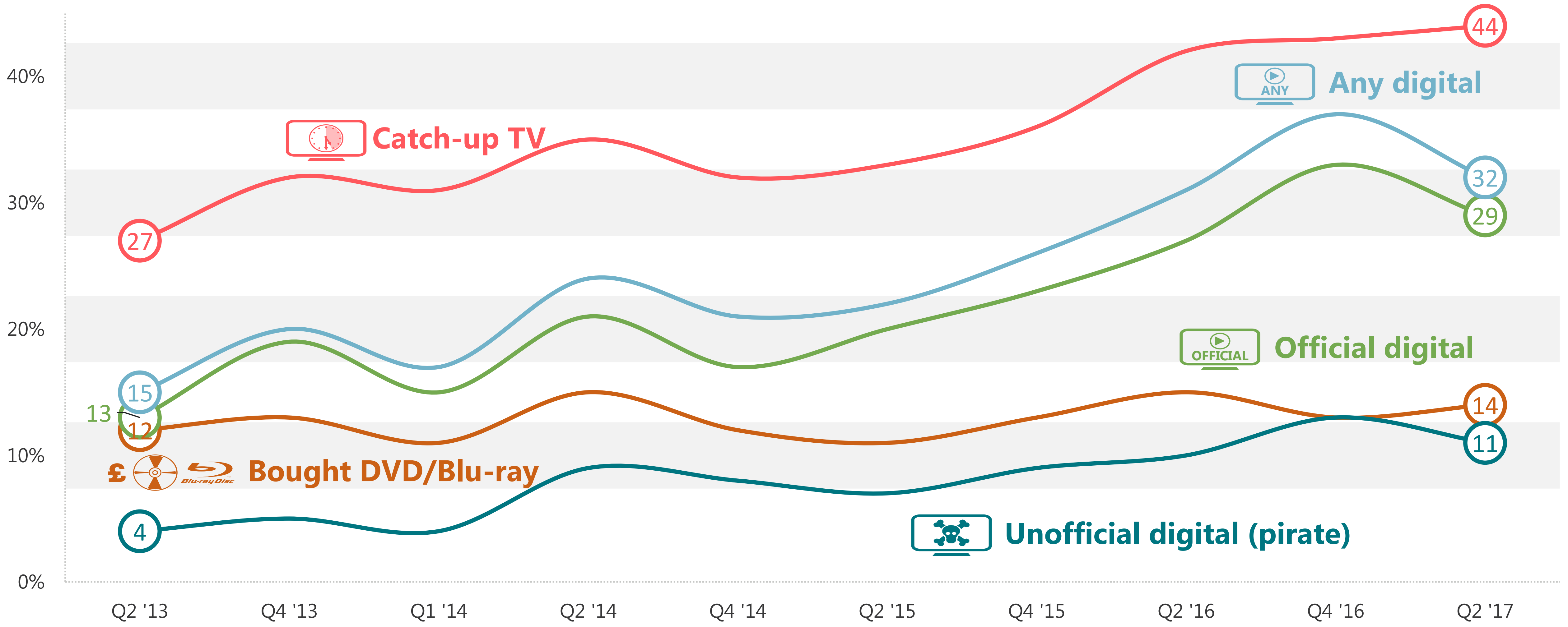


Base: circa 1,000 GB adults aged 15+ per wave / Movie consumption is tracked every 6 months

Source: Ipsos MORI

More than 2 in 5 GB adults watch catch-up TV

TV SERIES CONSUMPTION



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

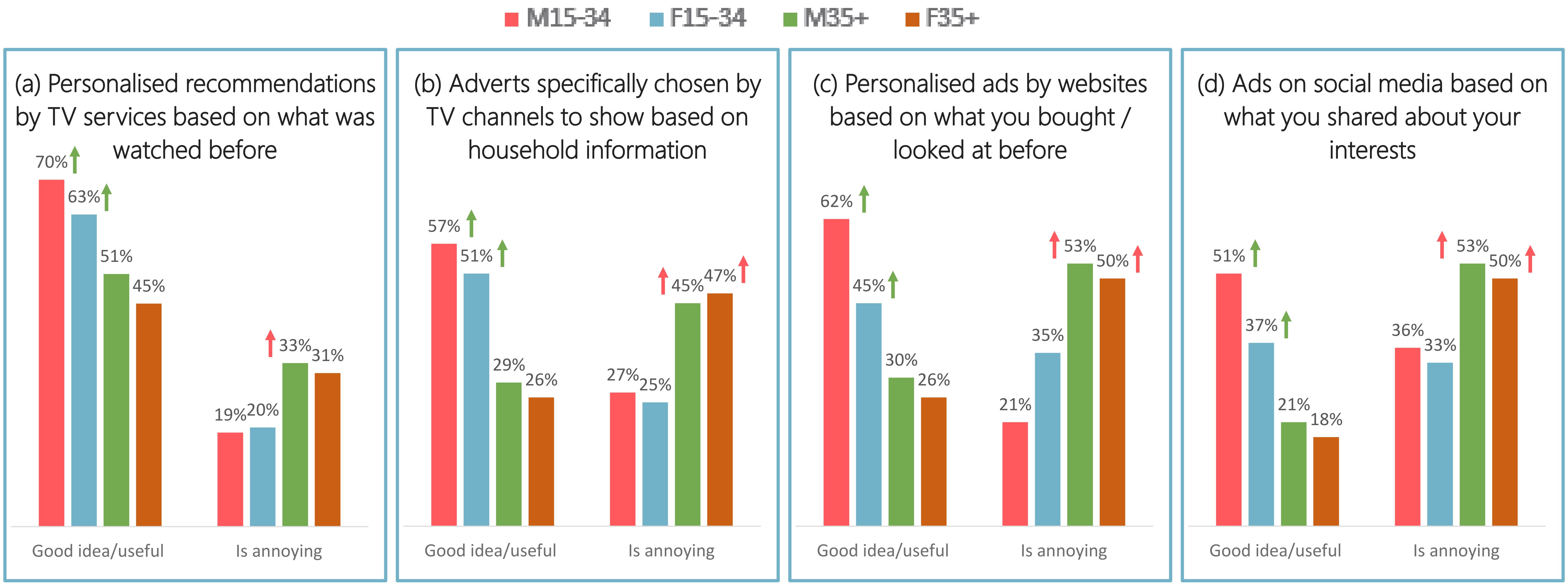
Source: Ipsos MORI

ARTIFICIAL INTELLIGENCE

Ipsos Connect

Perceptions are more positive amongst younger people, whilst negativity increases with age

What people think of personalised advertising



Base: All aware of each type of personalised services; a. (571), b. (408), c. (689), d. (620)

↑ Significantly higher than 35+'s of the same sex

↑ Significantly higher than 15-34's of the same sex

Source: Ipsos MORI

Ipsos Connect

4 in 10 people claim personalised TV recommendations based on previous viewing is more attention grabbing than other ads

People's reactions to personalised advertising

However, these types of advertising do not make people feel more positive towards the brand

	(a) Personalised recommendations by TV services based on what was watched before	(b) Adverts specifically chosen by TV channels to show based on household information	(c) Personalised ads by websites based on what you bought / looked at before	(d) Ads on social media based on what you shared about your interests	(e) Personalised ad including your name (e.g. Channel 4 ads for Alien)
Would grab my attention more than other types of ads	39%	29%	29%	29%	28%
Would make me feel positive towards the brand or product being advertised	12%	9%	10%	8%	8%

Base: All aware of each type of personalised services; a. (571), b. (408), c. (689), d. (620), e. (355)

Source: Ipsos MORI

TECH TRACKER TECHNICAL DETAILS

- Ipsos MORI interviewed a quota sample of **1004 adults aged 15+ in GB**.
- The latest interviews were carried out face to face **14th July – 21st July 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.

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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. 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 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.

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 €1.782,7 million in 2016.

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 Ipsos Connect

www.ipsos-mori.com/ipsosconnect