



TECH TRACKER

QUARTERLY RELEASE:

Q1 2018



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 2018 (Field in February)**

**REPRESENTATIVE SAMPLE OF
c.1000 GB ADULTS
AGED 15+**

AREAS COVERED



Voice Activated Speakers



Internet
usage



Connected
home



Social
networking



Smartphone
ownership

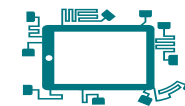


Tablet
ownership



Content consumption
Music / games / TV /
movies

Summary



Awareness of voice-activated speakers is continuing to increase. Ownership has risen by 3% points since Christmas, which brings voice-activated speaker ownership up to 8% among GB adults. Of these owners men are more likely to own than women, as are 35-54 year olds, ABC1's, and those with children at home.

The ownership of voice activated speakers also seems to be driven by gifting occasions, as half of owners were initially given their speaker as a gift (this helps to explain the rise in ownership since Q4 '17 and Christmas). In line with the assumption that a large proportion of people are receiving smart speakers as gifts, people tend to own just one device and Amazon Echo come out top as the most popular brand.

However, despite the rise in ownership, the activities that these speakers are being used for remains unchanged. Streaming music, listening to the radio, and checking the weather are still likely to be the most common activities undertaken on voice-activated speakers amongst both owners and non-owners. This potentially provides a huge opportunity for radio and streaming services.

Facebook remains the social media platform used by the most people in the past 3 months, with Instagram coming in second (but, still achieving less than half the number of Facebook users). However, Instagram is up 5 percentage points from this time last year. Snapchat users are younger than other social networks and have the highest proportion of female users.

A large, light gray decorative graphic on the left side of the slide, consisting of several concentric, semi-circular arcs that resemble sound waves emanating from a point.

VOICE ACTIVATED SPEAKERS



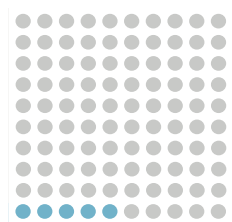
Ipsos Connect

Before Christmas, we told you that...

Despite over half knowing about voice activated speakers, just 5% owned one. Non-owners were most likely to use them for playing music, checking the weather, and setting alarms

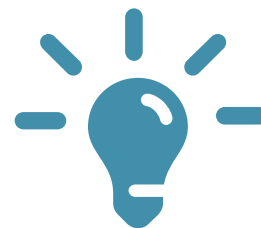
5%

Owned a voice-activated speaker



54%

Knew a lot, a fair amount or a little about them



NON-OWNERS WOULD USE THEM FOR...

Playing a specific song (53%)



Checking the weather (52%)



Setting a timer/alarm (52%)



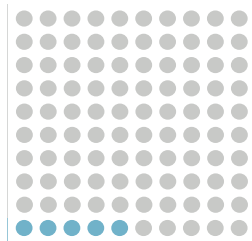
Base: All respondents (965); All non-owners who are likely to buy a voice-activated speaker in the future (87)
TK01a. Which of the following applies to you? Please mention all that apply; VS1. How much do you feel you know about Voice Activated Speakers?; VS7. Which, if any, of the following things do you think you would use Voice Activated Speakers for?

...However, ownership has risen significantly since then

Ownership has risen by 3% points since Christmas, which brings voice-activated speaker ownership up to 8% among GB adults

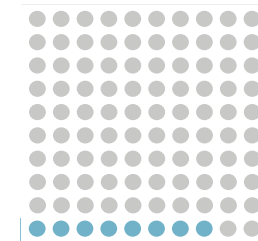
5%

Owned a voice-activated speaker



↑ 8%

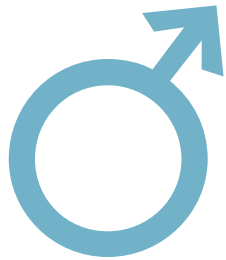
Now own a voice-activated speaker



Base: All respondents (965); All non-owners who are likely to buy a voice-activated speaker in the future (87)
TK01a. Which of the following applies to you? Please mention all that apply; VS1. How much do you feel you know about Voice Activated Speakers?; VS7. Which, if any, of the following things do you think you would use Voice Activated Speakers for?

Men are more likely to own than women, as are 35-54 year olds, ABC1's, and those with children at home

Ownership by different demographic groups

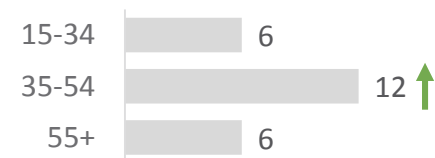


Male

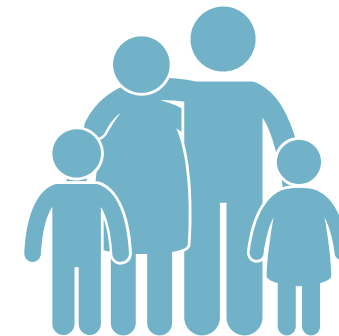
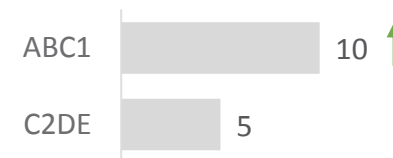


35-54

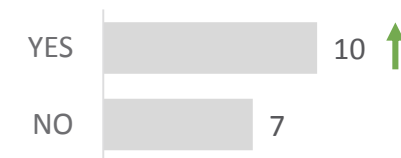
years old



ABC1



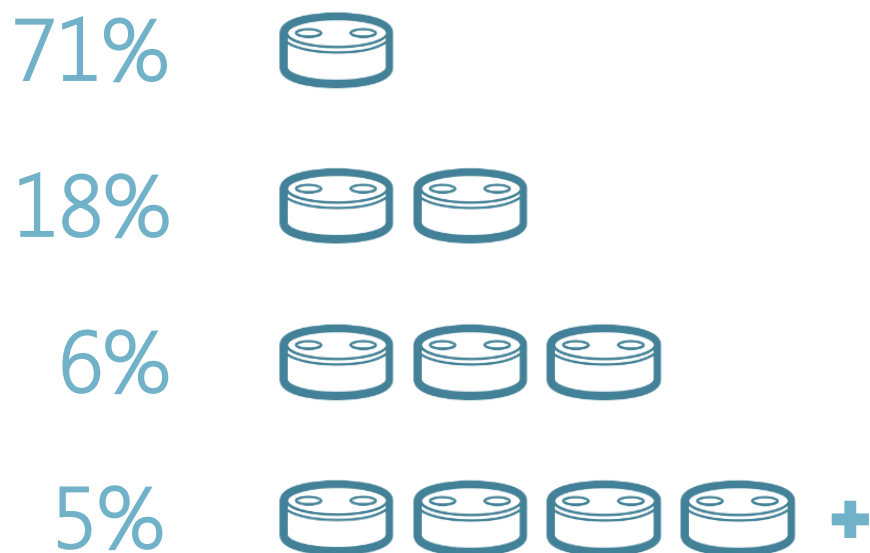
In a household
w. children



Base: All who own a voice-activated speaker (146)

People tend to own just one device, with Amazon Echo being the most popular brand

Number of voice-activated speakers owned and brand owned



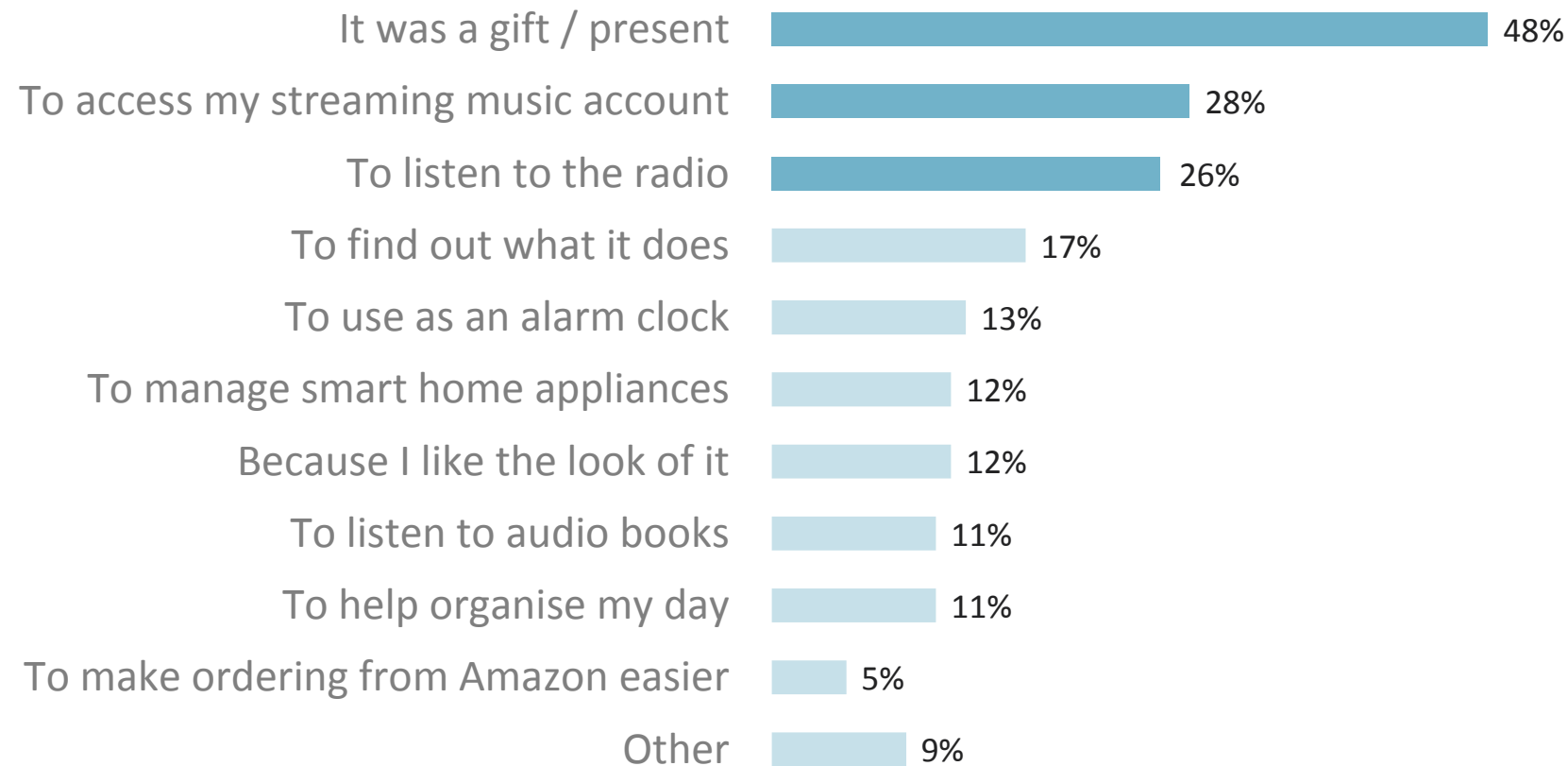
MEAN = 1.44 devices



Base: All who own a voice-activated speaker (146)
VS2. How many Voice Activated Speakers do you own?; VS2a. Which brand(s) of Voice Activated Speakers do you have?

Half of owners were initially given their speaker as a gift, which helps to explain the rise in ownership since Q4 '17

Reasons for getting a voice-activated speaker



 **MUSIC**



Google Play **Music**

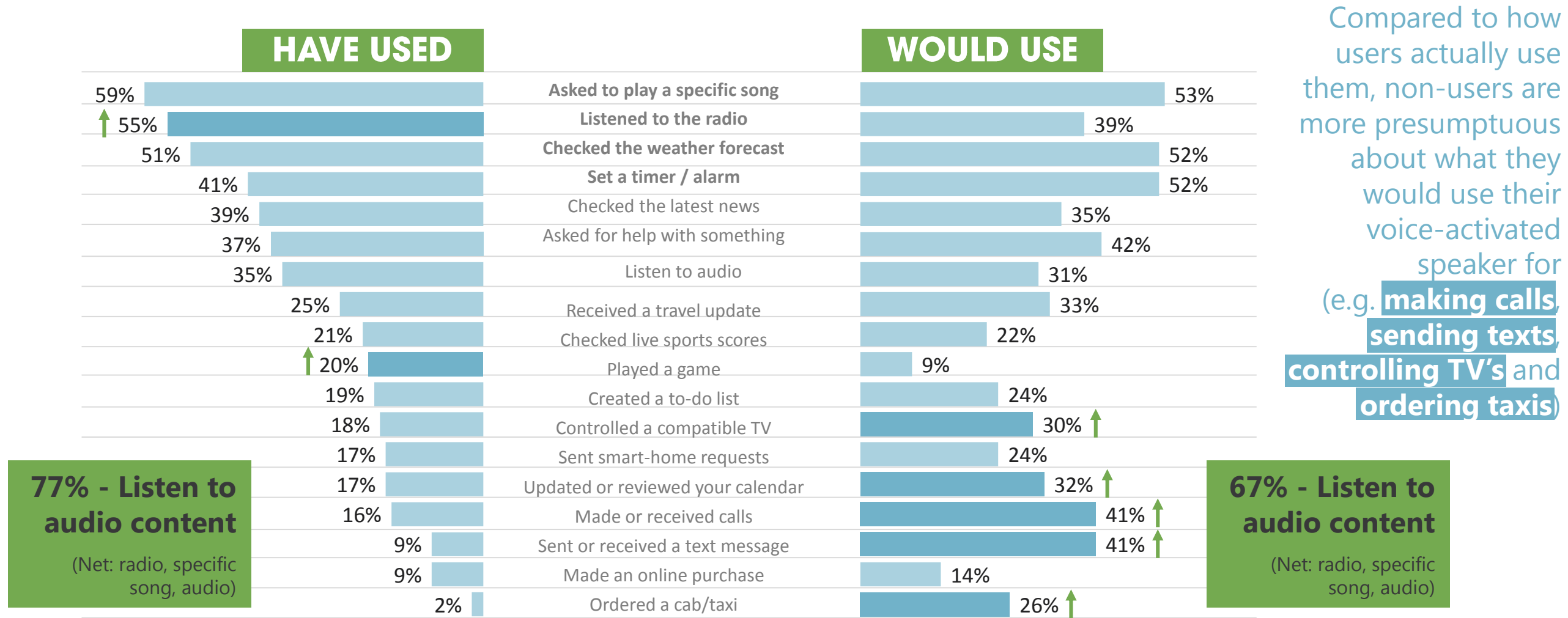
 **TIDAL**



Base: All who own a voice-activated speaker (146)
VS3. What were the reasons for getting a Voice Activated Speaker?

Speakers are mostly used for listening to music, checking the weather and setting alarms/timers

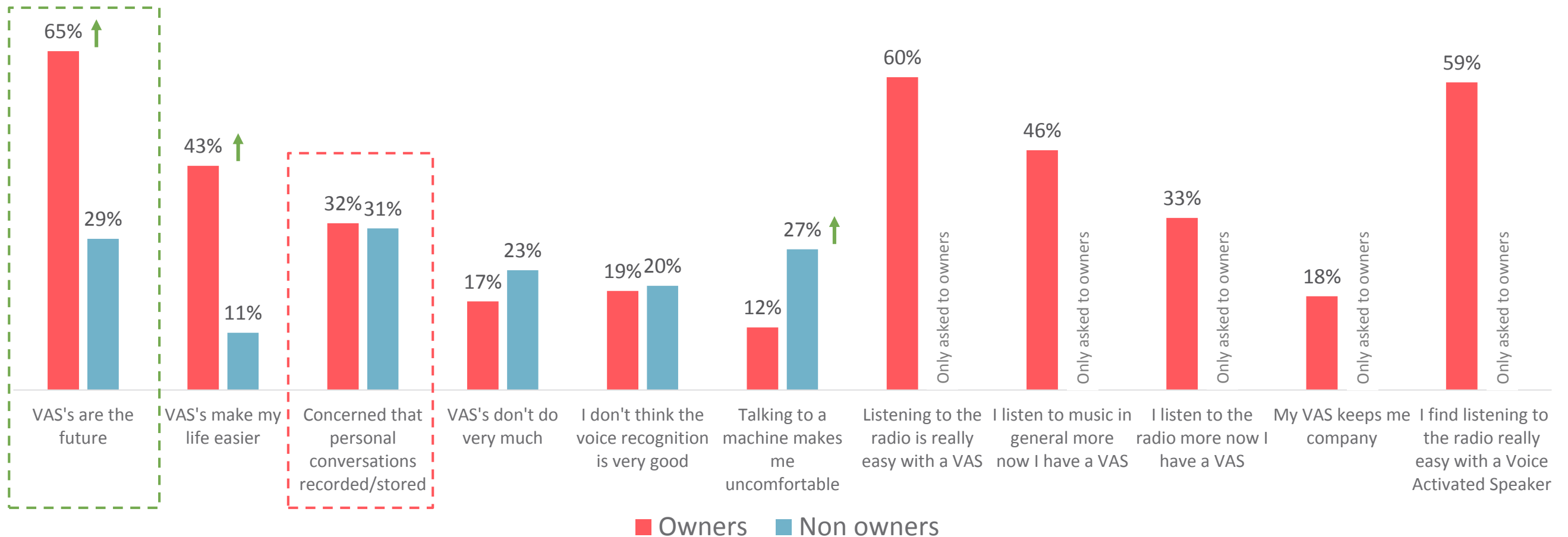
Main things voice-activated speakers used for / would be used for



Base: All who own a voice-activated speaker (146); All non-owners who are likely to buy in the future (87)
VS6. Which, if any, of the following things have you used your Voice Activated Speakers for? VS7. Which, if any, of the following things do you think you would use Voice Activated Speakers for?

Owners are more optimistic about the future of VAS's, although 1 in 3 are still concerned about potential safety issues

Attitudes towards voice-activated speakers



Base: All who own a voice-activated speaker (146); All who do not own a voice-activated speaker (918)
 VS9. To what extent, if at all, do you agree with the following statements?



INTERNET USAGE

HOW, WHEN, WHERE

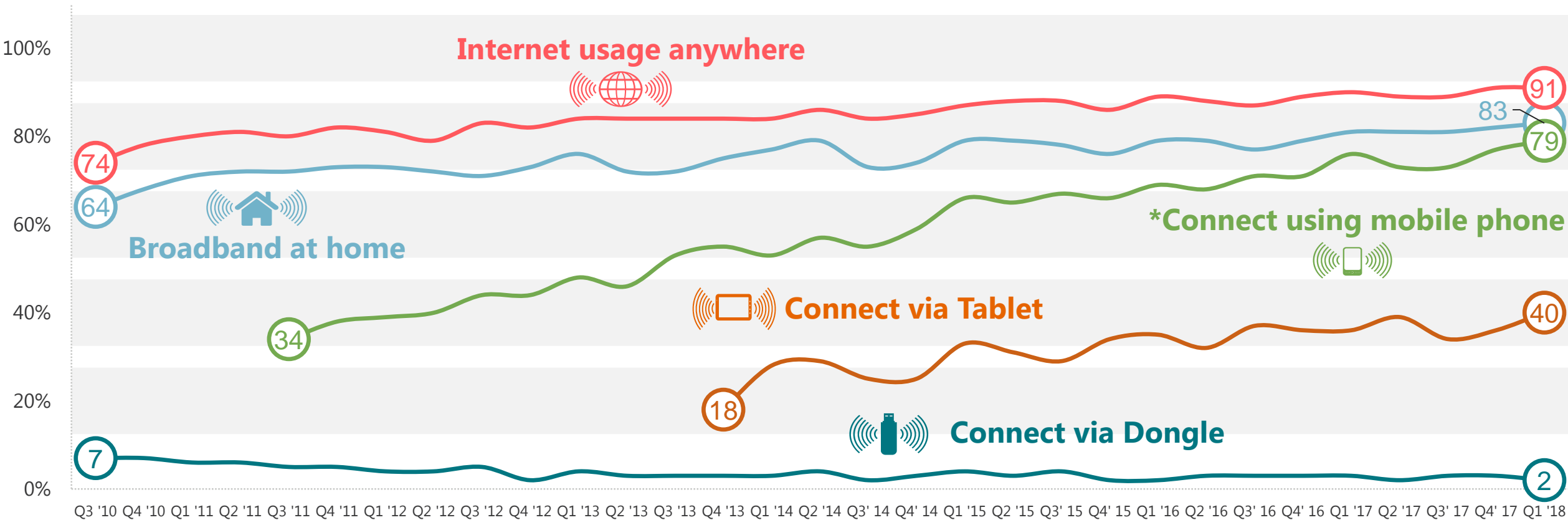


Ipsos Connect

Connectivity via tablet at its highest since 2016, whilst connectivity 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

3 in 4 females aged 65+ are accessing the internet, up 5 percentage points since Q4 2017



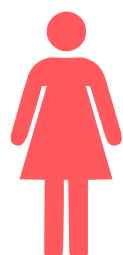
% ACCESSING THE INTERNET BY GENDER AND SOCIAL GRADE



Males

Males AB
Males C1
Males C2
Males DE

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	92%	99%	99%	97%	95%	92%	74%
Males AB	98%	100%	99%	100%	100%	99%	92%
Males C1	95%	100%	99%	98%	98%	96%	76%
Males C2	90%	99%	100%	98%	97%	93%	62%
Males DE	83%	97%	96%	88%	83%	78%	56%



Females

Females AB
Females C1
Females C2
Females DE

	All	15-24	25-34	35-44	45-54	55-64	65+
Females	89%	100%	99%	97%	95%	91%	65%
Females AB	97%	100%	100%	100%	99%	97%	89%
Females C1	92%	100%	100%	98%	98%	95%	68%
Females C2	88%	100%	100%	99%	92%	85%	55%
Females DE	79%	99%	95%	91%	88%	80%	46%



0-49%



50-79%



80-100%

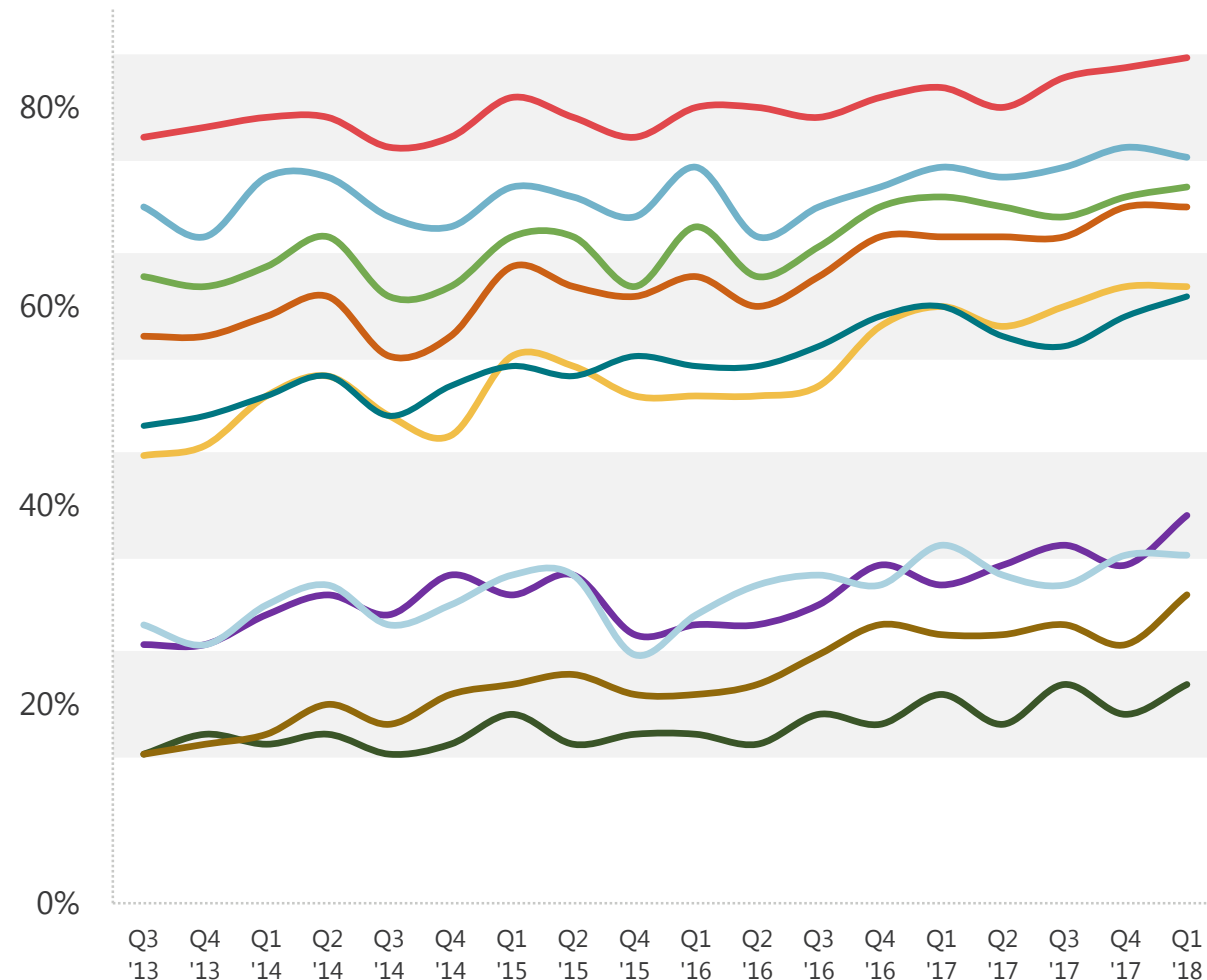
Base: circa 4,000 GB adults aged 15+: Q2-4 2017 Q1 2018

Source: Ipsos MORI

Downloading/streaming music online sees the largest uplift year on year (+7 percentage points)



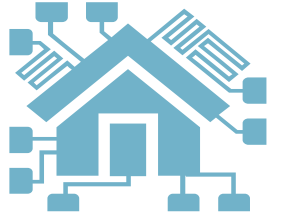
% USE OF THE INTERNET IN THE PAST 3 MONTHS



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

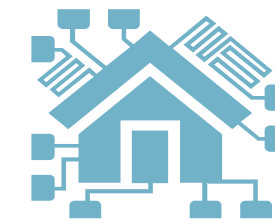


CONNECTED HOME

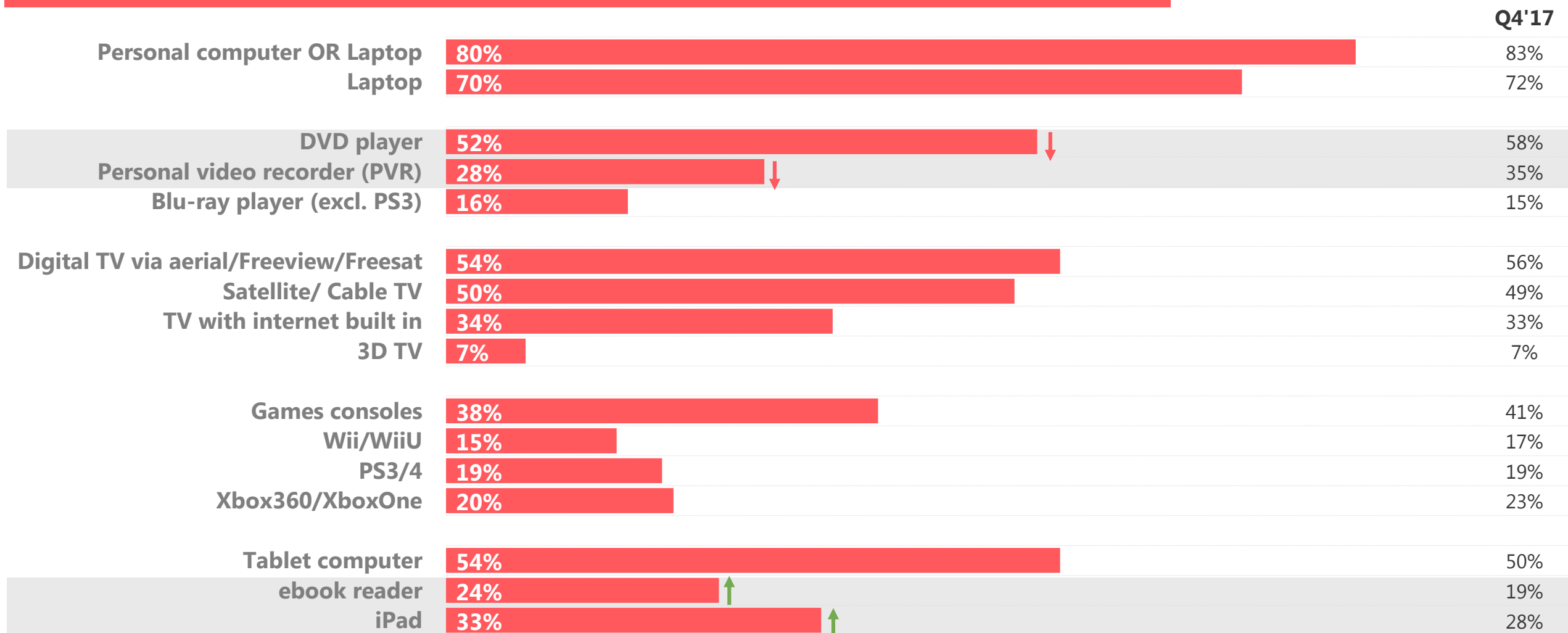


Ipsos Connect

Ownership of DVD's and PVR's is down versus last quarter, though iPad and eBook reader ownership is up



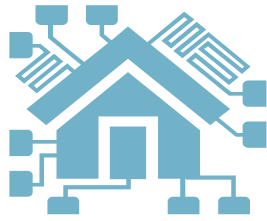
WHICH OF THE FOLLOWING DO YOU OWN/HAVE IN YOUR HOUSEHOLD?



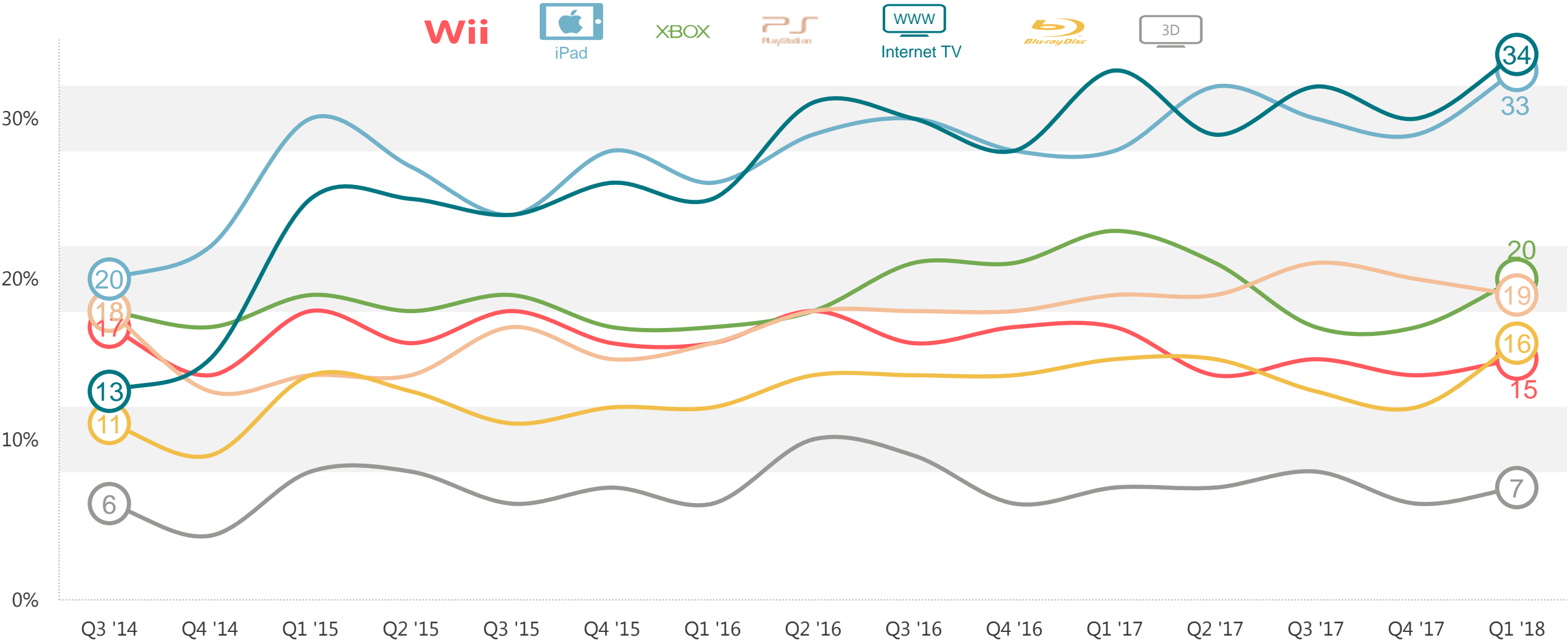
Base: circa 1,000 GB adults aged 15+: Quarter 1 2018

Source: Ipsos MORI

Xbox ownership increases following a slight drop before Christmas, but PlayStation remains stable



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



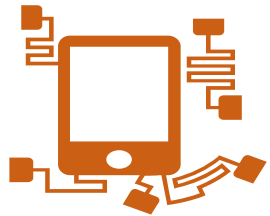


SMARTPHONE OWNERSHIP

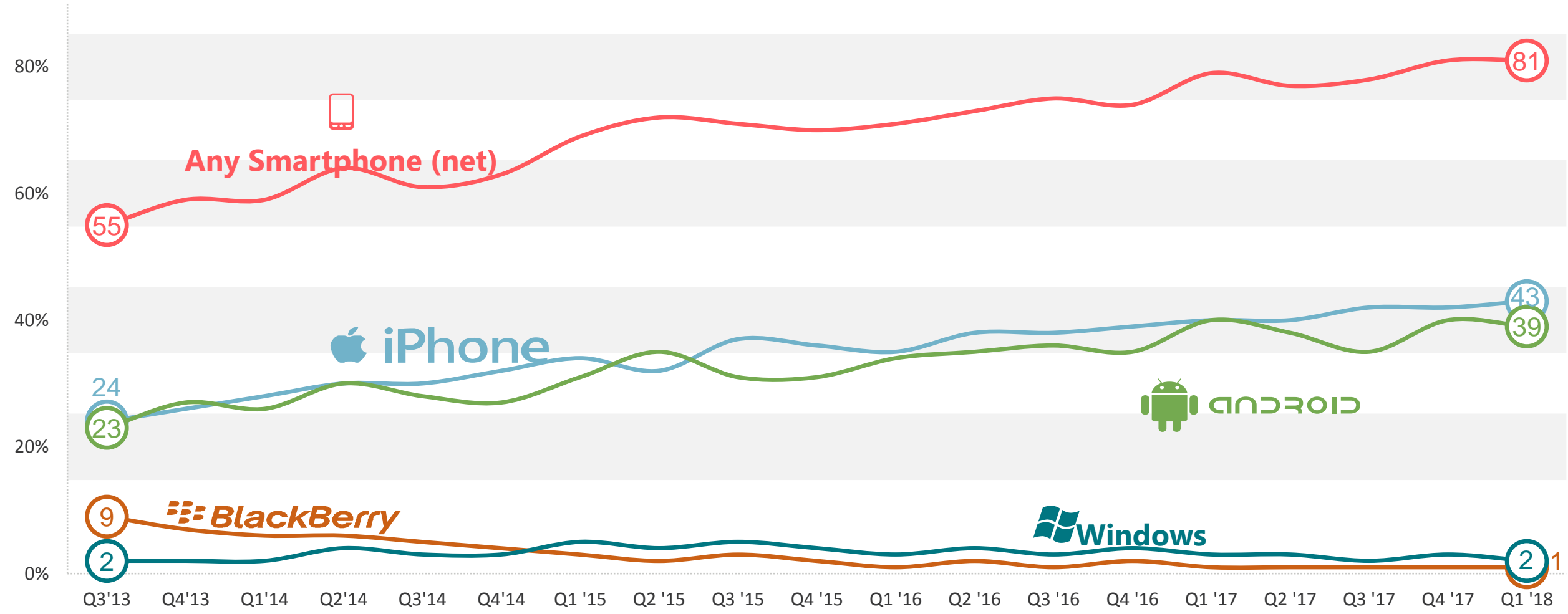


Ipsos Connect

iPhone currently leads Android by 4 percentage points



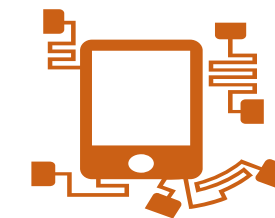
% OWN by MANUFACTURER



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

Source: Ipsos MORI

Smartphone ownership remains similar across genders and continues to increase amongst 65+



% OWN A SMARTPHONE BY GENDER AND SOCIAL GRADE



Males%

Males AB%
Males C1%
Males C2%
Males DE%

	All%	15-24%	25-34%	35-44%	45-54%	55-64%	65+%
Males AB%	81%	98%	95%	94%	87%	75%	45%
Males C1%	84%	98%	95%	97%	96%	84%	58%
Males C2%	87%	98%	99%	96%	90%	87%	49%
Males DE%	79%	99%	98%	93%	84%	77%	32%
Males DE%	71%	97%	88%	88%	75%	51%	34%



Females%

Females AB%
Females C1%
Females C2%
Females DE%

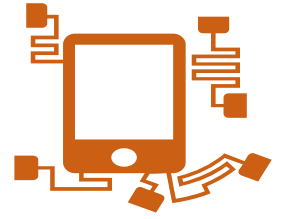
	All%	15-24%	25-34%	35-44%	45-54%	55-64%	65+%
Females AB%	78%	96%	95%	93%	87%	76%	39%
Females C1%	85%	94%	96%	95%	94%	88%	60%
Females C2%	82%	98%	96%	95%	91%	82%	43%
Females DE%	80%	95%	96%	92%	95%	78%	27%
Females DE%	65%	96%	94%	87%	66%	49%	23%

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

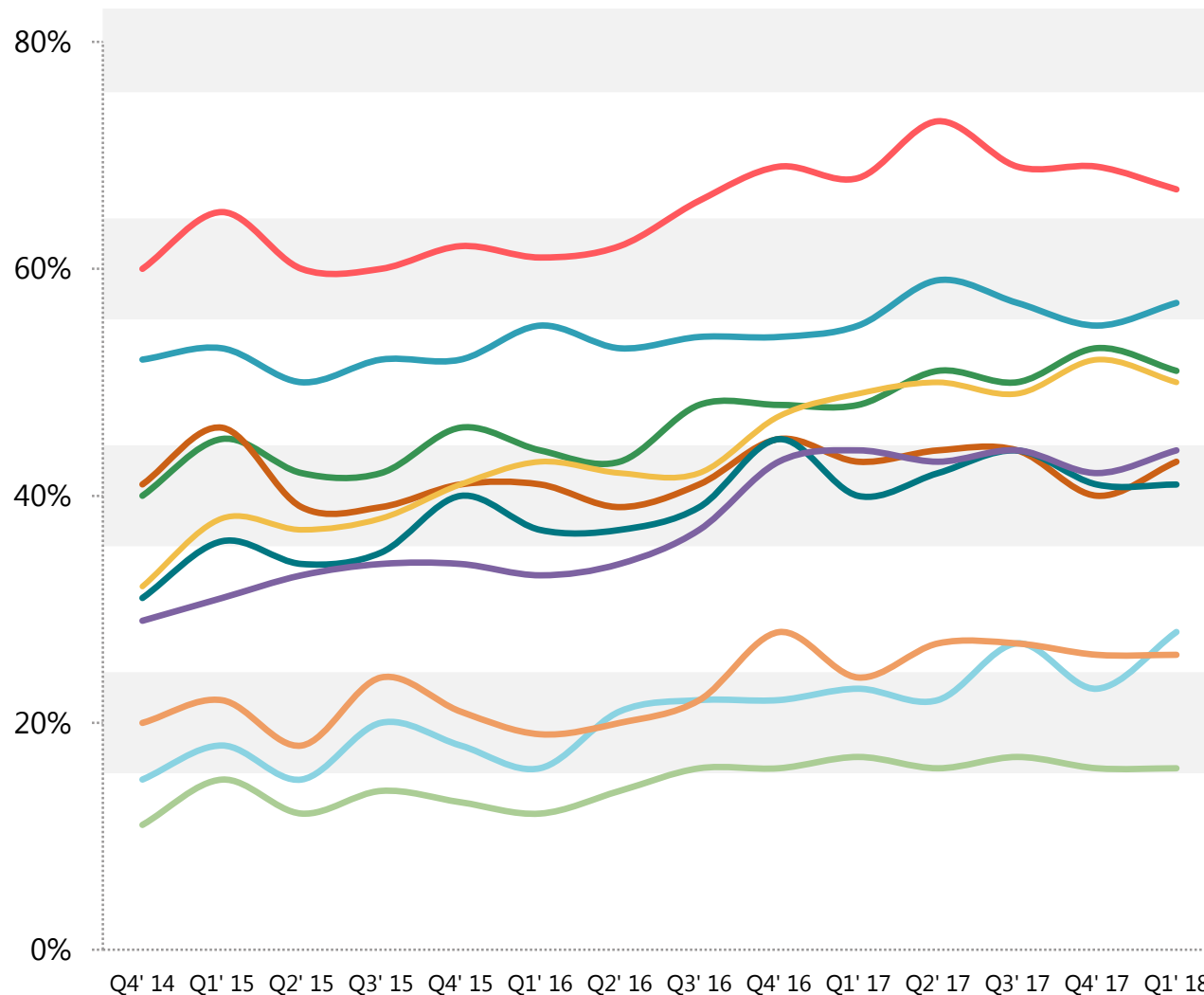
Base: circa 4,000 GB adults aged 15+: Q1/ Q2/ Q3/ Q4 2018

Source: Ipsos MORI

Over Christmas instant messaging, online shopping, and social media were the most popular activities

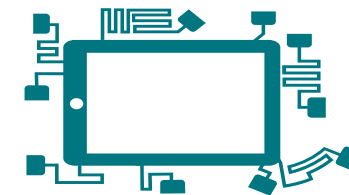


USE OF SMARTPHONE IN THE PAST 3 MONTHS



- 67%** Read or send emails
- 57%** Visit social networking sites
- 51%** Browse websites for personal interests
- 50%** Online banking
- 44%** Online shopping
- 43%** Download apps for free
- 41%** Watch video clips on sites such as Youtube
- 28%** Use instant messaging services such as BBM
- 26%** Download/ stream music over the internet
- 16%** Watch catch-up TV

Base: circa 500-750 smartphone owners per wave

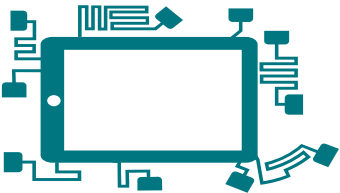


TABLET OWNERSHIP

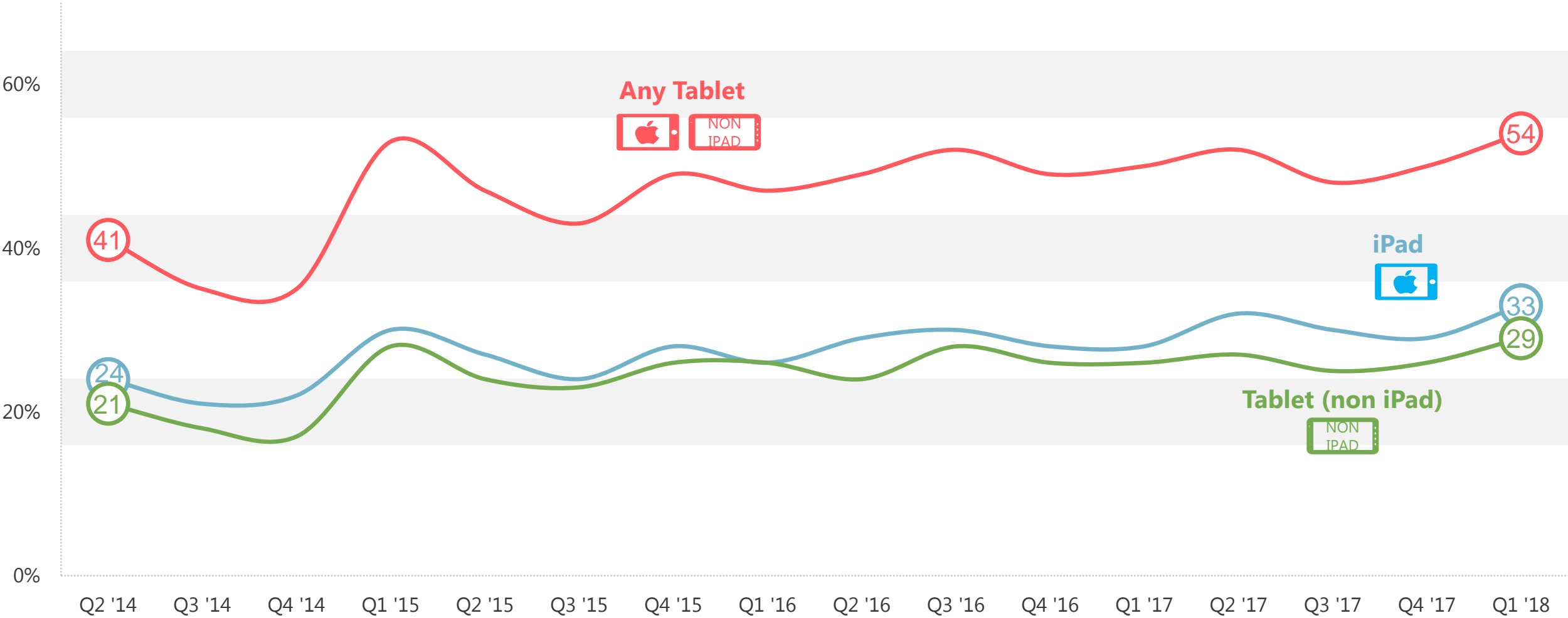


Ipsos Connect

Total ownership is up 4 percentage points year-on-year, driven mostly by an increase in iPad ownership



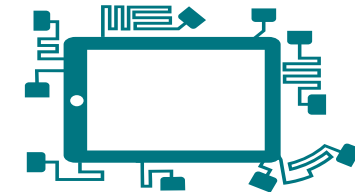
% OWN A TABLET IN THE HOUSEHOLD



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

Source: Ipsos MORI

The biggest gender gap in ownership is amongst 15-24's, here females are more likely to be owners



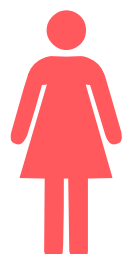
% OWN A TABLET BY GENDER AND SOCIAL GRADE ACROSS



Males

Males AB
Males C1
Males C2
Males DE

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	50%	44%	46%	58%	58%	56%	42%
Males AB	67%	68%	54%	74%	74%	71%	61%
Males C1	52%	40%	53%	63%	59%	58%	43%
Males C2	46%	42%	40%	44%	60%	61%	35%
Males DE	32%	36%	35%	43%	30%	32%	18%



Females

Females AB
Females C1
Females C2
Females DE

	All	15-24	25-34	35-44	45-54	55-64	65+
Females	52%	53%	51%	61%	61%	57%	37%
Females AB	66%	72%	49%	71%	73%	72%	56%
Females C1	53%	58%	55%	61%	68%	50%	36%
Females C2	54%	54%	57%	68%	59%	60%	34%
Females DE	36%	40%	43%	38%	40%	40%	25%



0-24%



25-49%

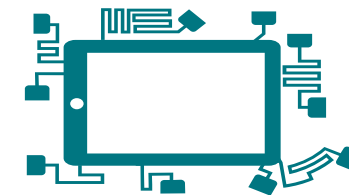


50-100%

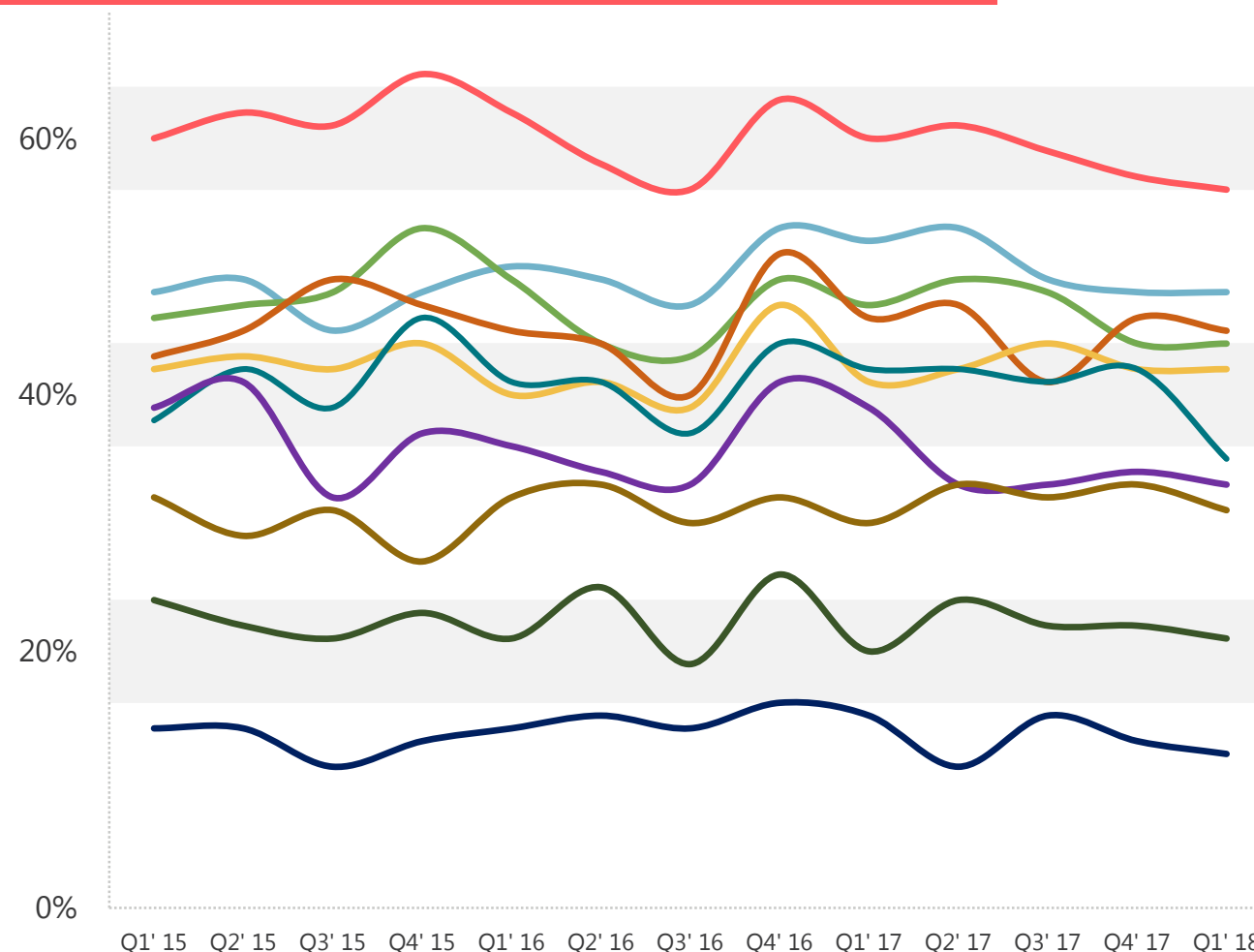
Base: circa 4,000 GB adults aged 15+: Q2-4 2017, Q1 2018

Source: Ipsos MORI

Fewer people use their iPad for online banking, down 7 percentage points vs. this time last year



USE OF TABLET IN THE PAST 3 MONTHS



- 56% Read or send emails
- 48% Browse websites for personal interests
- 45% Online shopping
- 44% Visit social networking sites
- 42% Watch video clips on sites such as Youtube
- 35% Online banking
- 33% Download apps for free
- 31% Watch catch-up TV
- 21% Download/ stream music over the internet
- 12% Use the internet to make video calls (VOIP)

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

Source: Ipsos MORI

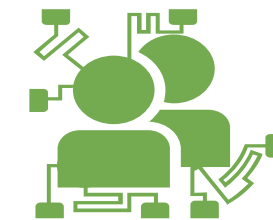


SOCIAL NETWORKING



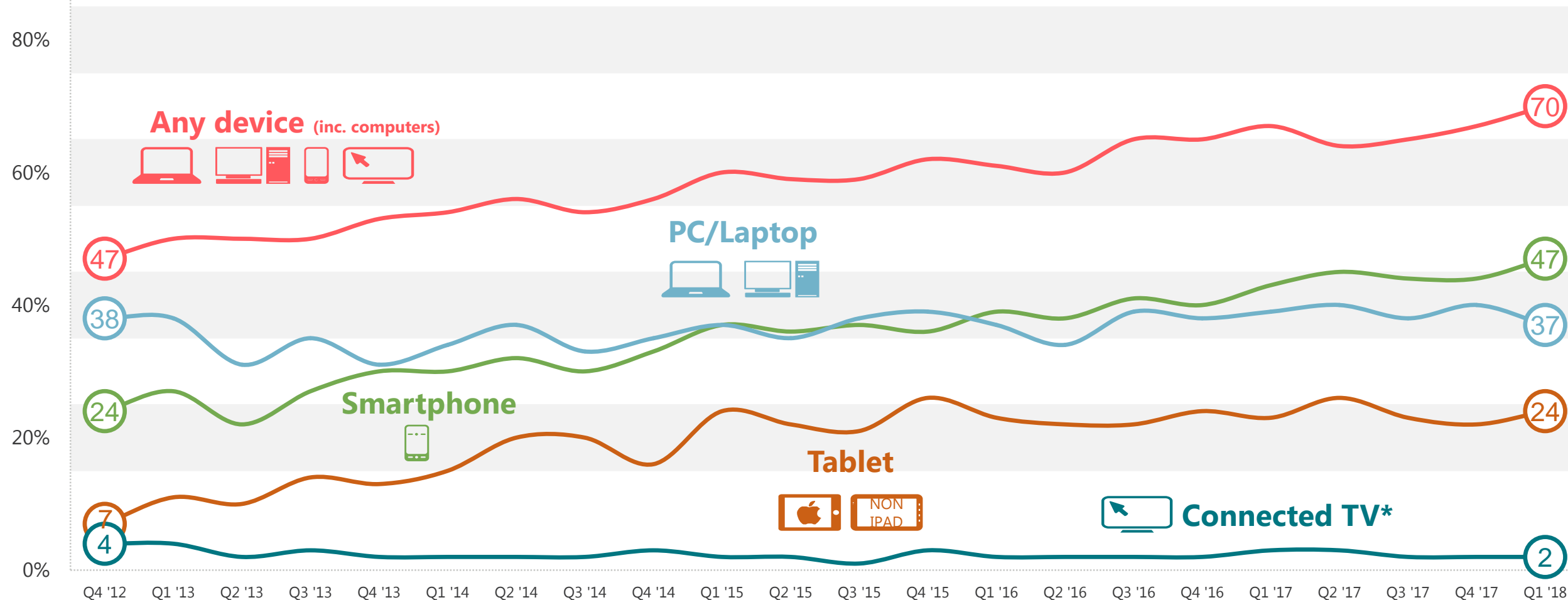
Ipsos Connect

7 in 10 GB adults access social networking sites, with half using their smartphones to do so



% VISITING SOCIAL NETWORKING SITES

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



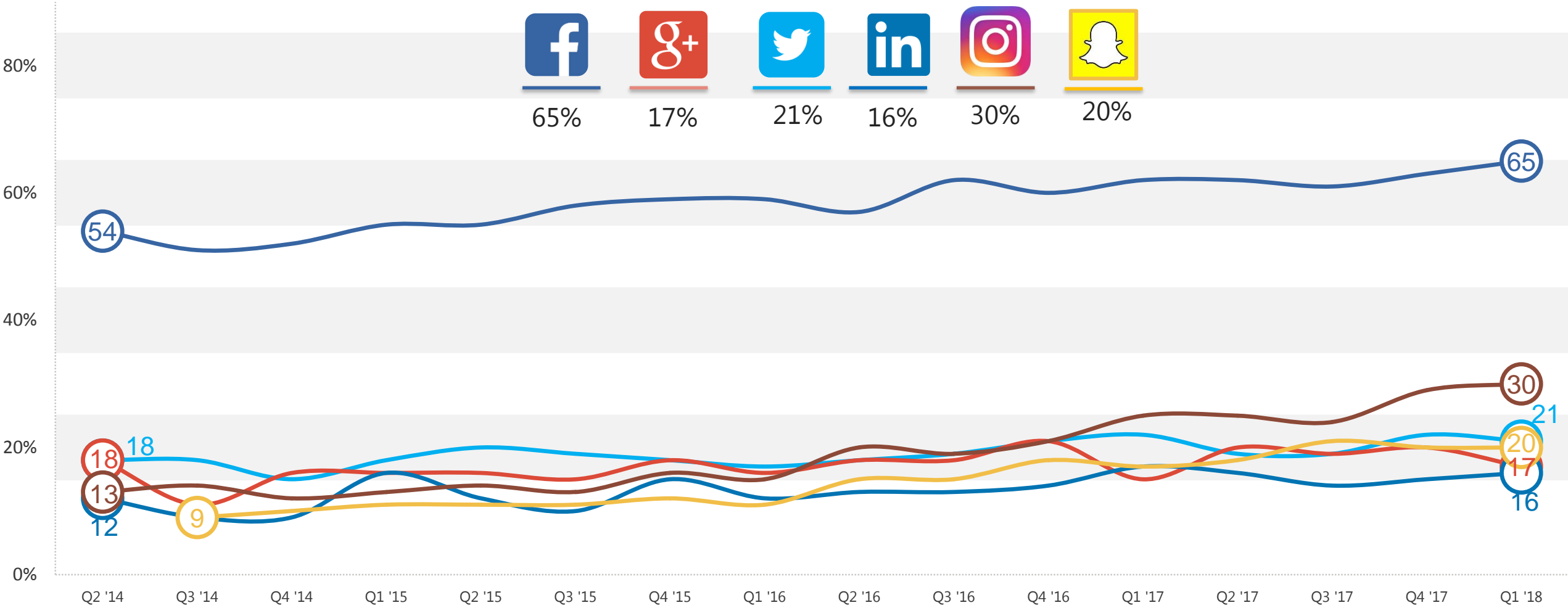
Base: circa 1,000 GB adults aged 15+ per wave

Source: Ipsos MORI

Instagram visits are up 5 percentage points vs. Q1'17, although Facebook maintains the top spot



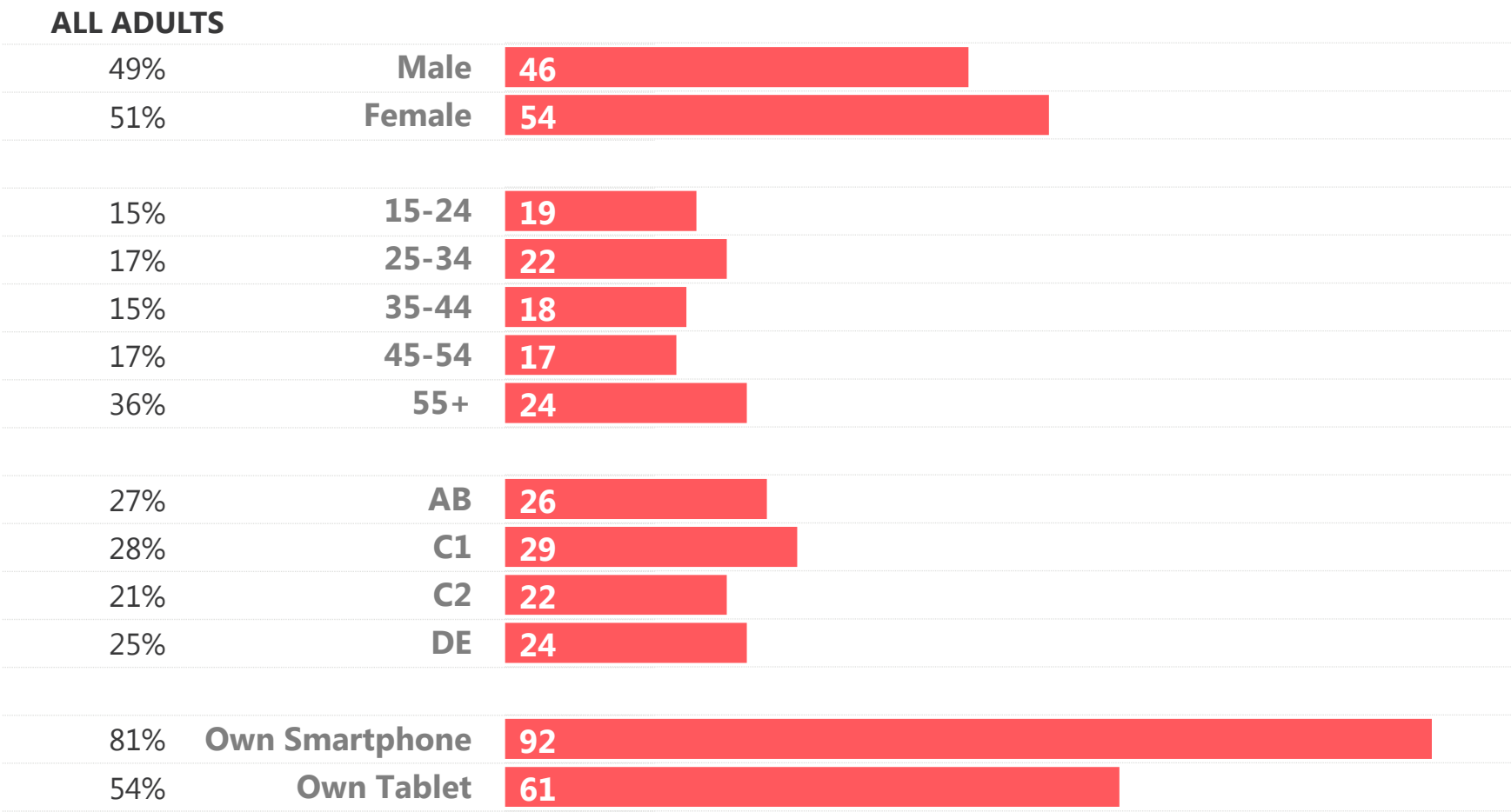
% VISITED IN LAST 3 MONTHS



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

Source: Ipsos MORI

Owed to its popularity, the profile of Facebook users are representative of the wider GB population



The profile of Facebook users is a close match to the GB adult population in terms of age. Both the younger and older demographics make 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 3 in 5 owning a tablet.

Base: circa GB adults (1,000) / All visiting / using Facebook in last 3 months (619) Q1 2018

Source: Ipsos MORI

3 in 10 people aged 65+ have accessed Facebook in the last 3 months, more so than any other social media site



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



Males

Males AB
Males C1
Males C2
Males DE

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	60%	87%	77%	70%	58%	46%	28%
Males AB	60%	90%	75%	79%	66%	45%	37%
Males C1	66%	87%	85%	65%	66%	52%	31%
Males C2	60%	86%	77%	84%	45%	51%	20%
Males DE	52%	86%	70%	46%	50%	39%	20%



Females

Females AB
Females C1
Females C2
Females DE

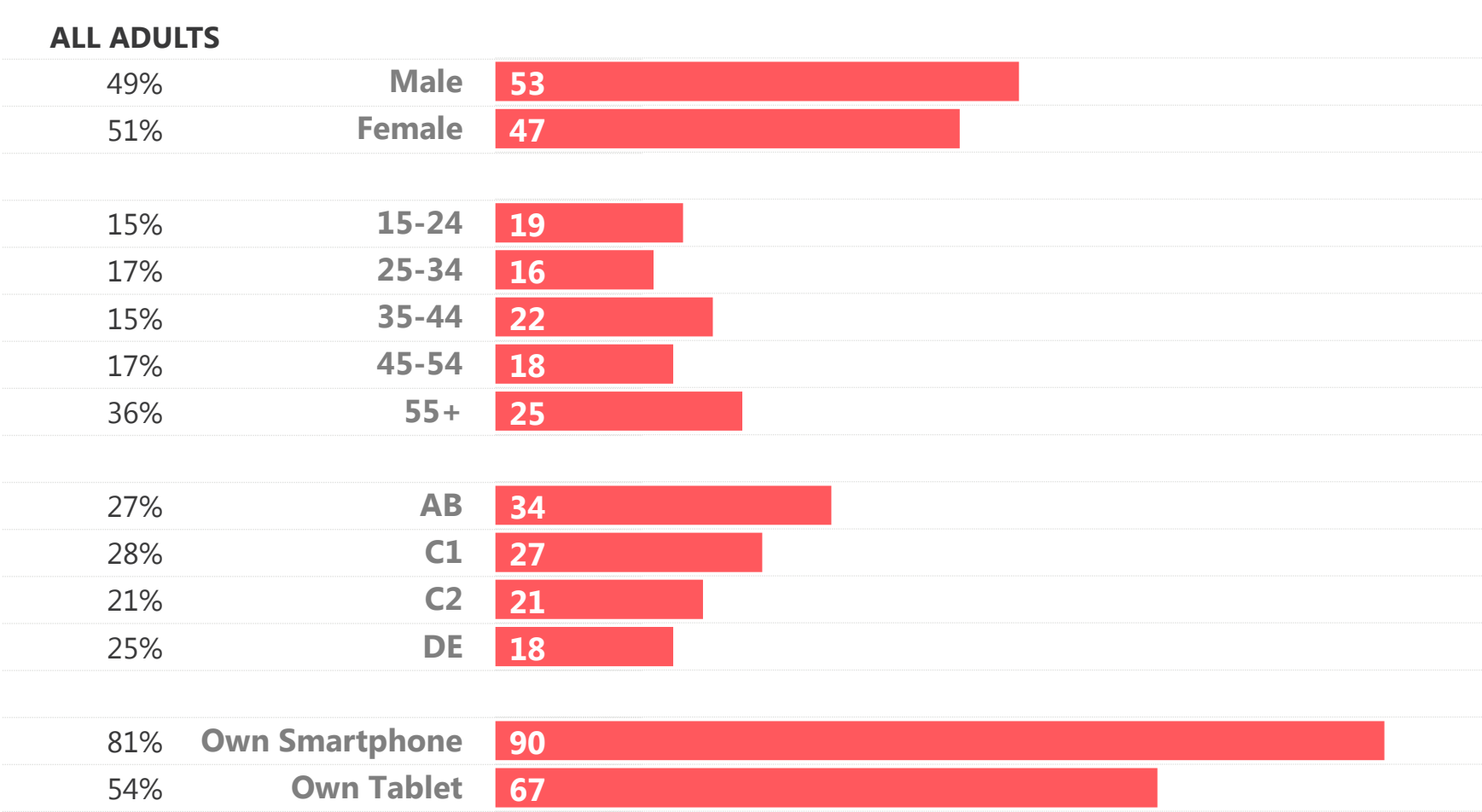
	All	15-24	25-34	35-44	45-54	55-64	65+
Females	66%	86%	85%	81%	67%	59%	32%
Females AB	65%	84%	87%	86%	67%	64%	32%
Females C1	70%	91%	87%	80%	75%	61%	38%
Females C2	67%	83%	84%	90%	70%	52%	26%
Females DE	60%	83%	84%	70%	60%	55%	28%

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

Base: circa 4,000 GB adults aged 15+: Q2-4 2017, Q1 2018

Source: Ipsos MORI

The profile of Google+ users is skewed slightly in favour of males and those aged 35-44 vs. the GB population



A quarter of Google+ users are aged 55+, which is higher than other social media sites.

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 (154) Q1 2018

Source: Ipsos MORI

Usage of Google+ is most prevalent among those aged 15-24



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

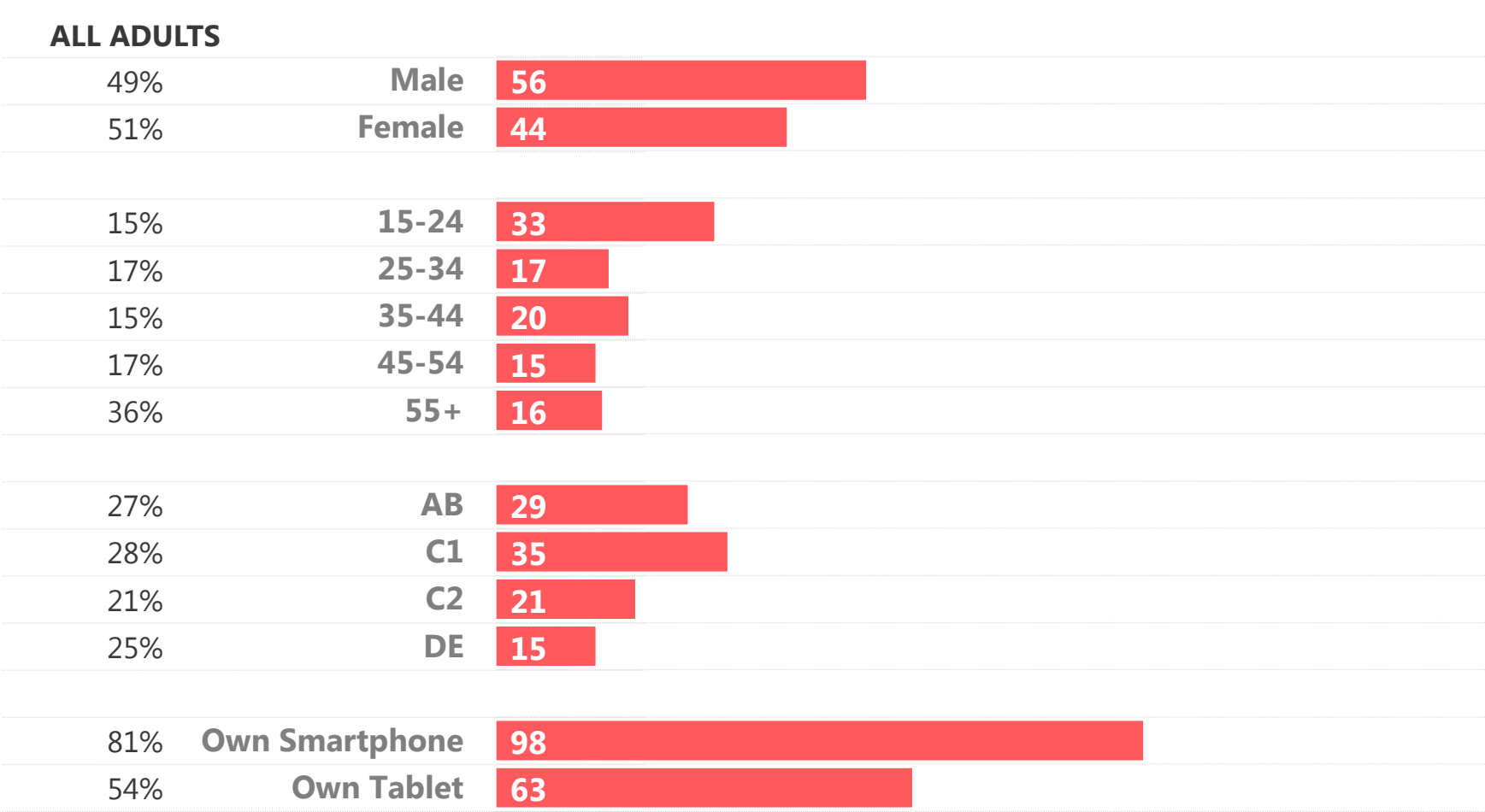
		All	15-24	25-34	35-44	45-54	55-64	65+
	Males	19%	26%	21%	23%	18%	17%	10%
	Males AB	20%	22%	22%	28%	22%	21%	11%
	Males C1	18%	21%	19%	17%	20%	24%	11%
	Males C2	20%	28%	29%	25%	13%	16%	9%
	Males DE	18%	35%	17%	24%	13%	9%	11%
	Females	19%	28%	23%	23%	18%	15%	10%
	Females AB	19%	40%	18%	23%	21%	14%	12%
	Females C1	17%	25%	15%	21%	13%	18%	12%
	Females C2	21%	24%	23%	28%	23%	13%	12%
	Females DE	19%	29%	35%	24%	14%	15%	6%

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

Base: circa 4,000 GB adults aged 15+: Q2-4 2017, Q1 2018

Source: Ipsos MORI

Twitter users are more likely to be male, aged 15-24, and ABC1



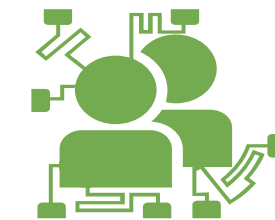
Two thirds of Twitter users are ABC1s.

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

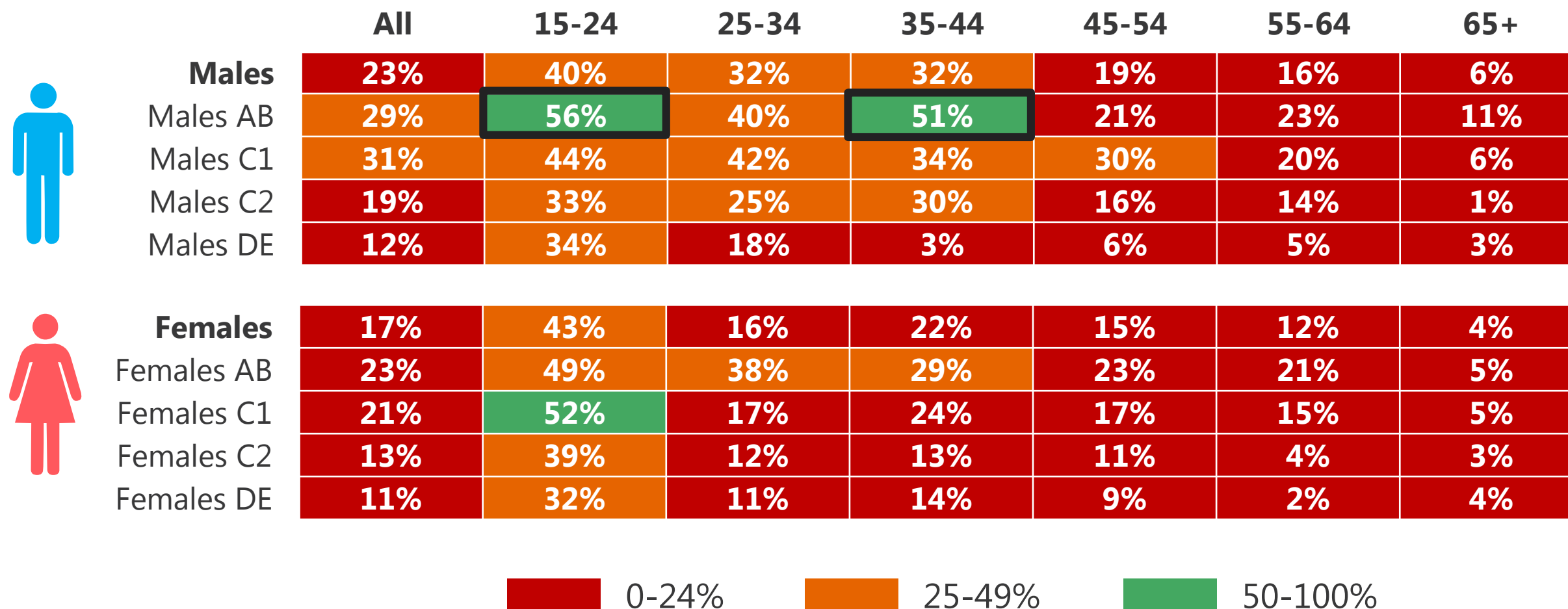
Base: circa GB adults (1,000) / All visiting / using Twitter in last 3 months (202) Q1 2018

Source: Ipsos MORI

Twitter usage is higher among AB males aged 15-24 and 35-44



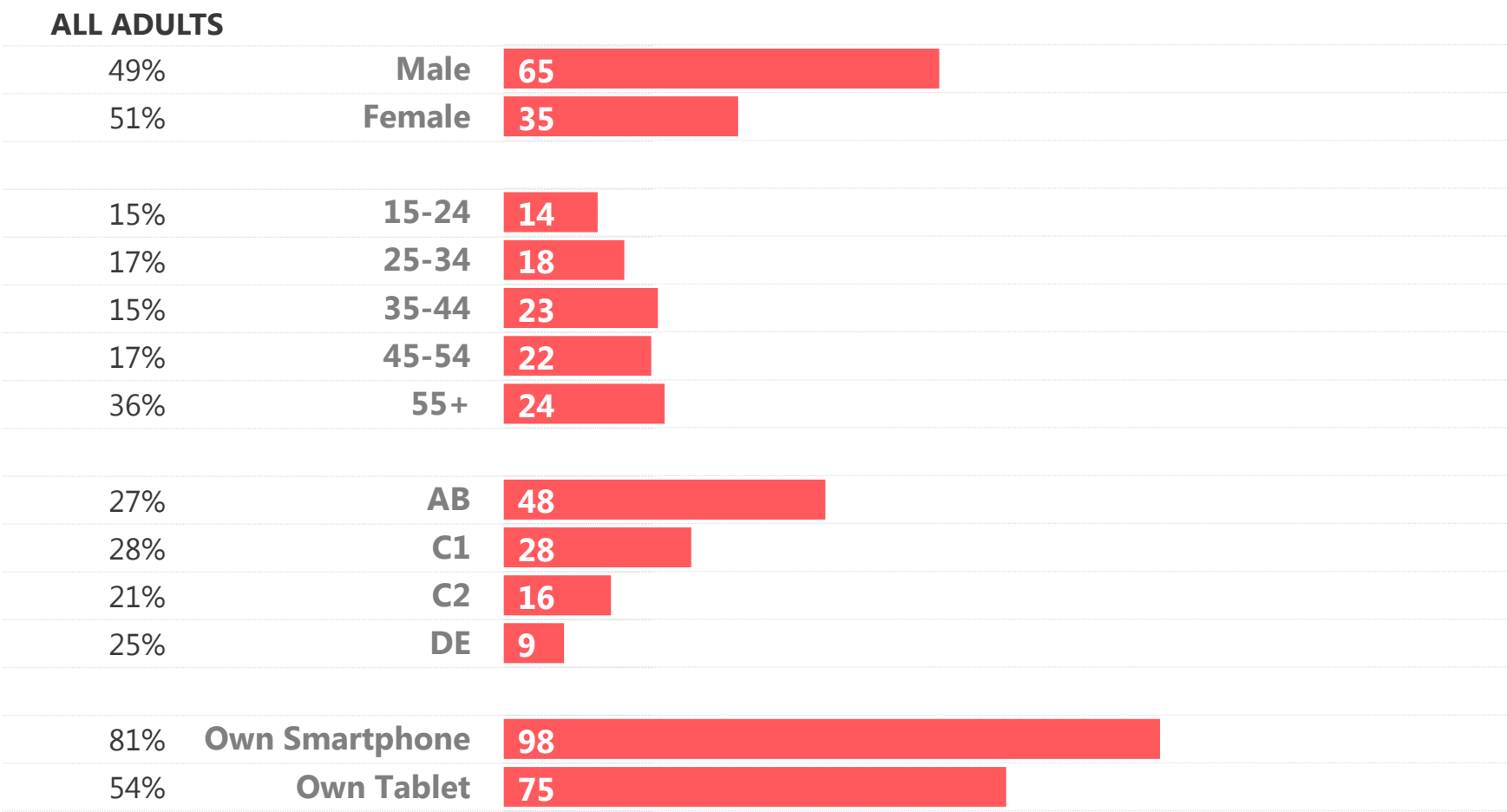
% ACCESSING TWITTER IN THE PAST 3 MONTHS, BY GENDER AND SOCIAL GRADE



Base: circa 4,000 GB adults aged 15+: Q2-4 2017, Q1 2018

Source: Ipsos MORI

2 in 3 LinkedIn users are male, higher than other social media platforms



LinkedIn is a more specific social network. Usage is highest amongst those aged 35+ years, and more than 3 in 4 are social grade AB.

Base: circa GB adults (1,000) / All visiting / using LinkedIn in last 3 months (140) Q1 2018

Source: Ipsos MORI

Males accessing LinkedIn are more likely to be social grade AB



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



Males

Males AB

Males C1

Males C2

Males DE

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	19%	17%	24%	27%	22%	19%	8%
Males AB	34%	30%	54%	47%	35%	36%	14%
Males C1	25%	24%	29%	34%	32%	21%	8%
Males C2	8%	11%	7%	10%	7%	11%	4%
Males DE	4%	7%	5%	5%	3%	4%	1%



Females

Females AB

Females C1

Females C2

Females DE

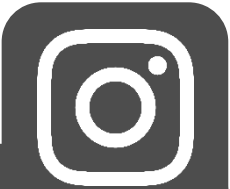
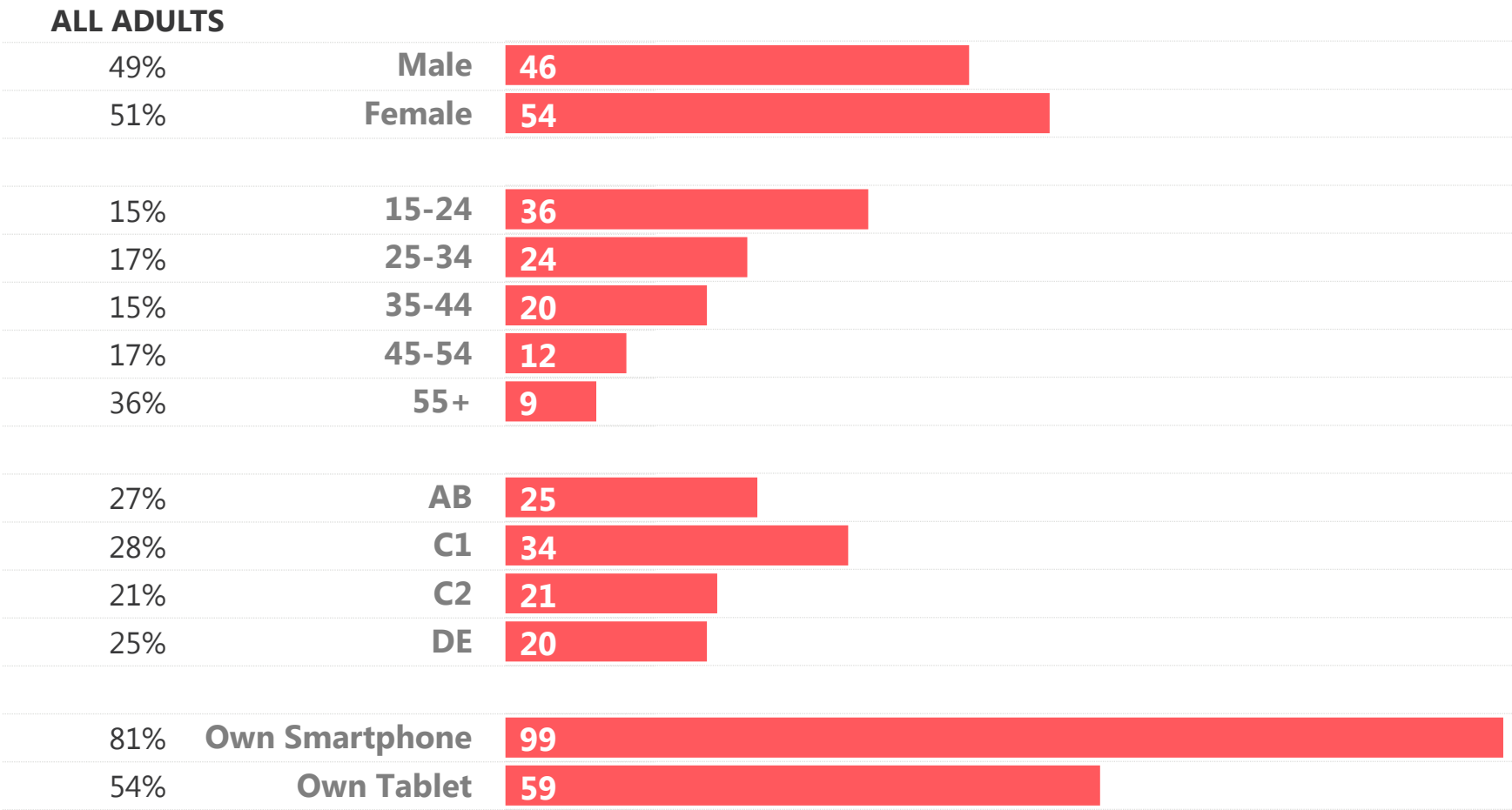
	All	15-24	25-34	35-44	45-54	55-64	65+
Females	11%	14%	16%	19%	13%	9%	2%
Females AB	21%	26%	41%	29%	22%	19%	7%
Females C1	14%	19%	20%	20%	21%	9%	1%
Females C2	6%	6%	8%	11%	7%	3%	0%
Females DE	4%	9%	9%	4%	0%	0%	0%

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

Base: circa 4,000 GB adults aged 15+: Q2-4 2017, Q1 2018

Source: Ipsos MORI

Instagram users are more likely to be female and aged 15-24



Two thirds of all Instagram users are aged 15-34, with more than 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 (275) Q1 2018

Source: Ipsos MORI

15-24 year olds use Instagram more than any other age-group



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



Males

Males AB
Males C1
Males C2
Males DE

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	25%	61%	38%	29%	16%	8%	2%
Males AB	23%	65%	46%	40%	17%	9%	2%
Males C1	29%	64%	35%	22%	23%	13%	3%
Males C2	28%	61%	42%	36%	19%	10%	2%
Males DE	18%	53%	32%	16%	7%	3%	0%



Females

Females AB
Females C1
Females C2
Females DE

	All	15-24	25-34	35-44	45-54	55-64	65+
Females	29%	71%	44%	38%	20%	10%	5%
Females AB	30%	78%	64%	41%	24%	17%	9%
Females C1	34%	75%	51%	41%	27%	11%	3%
Females C2	25%	61%	30%	42%	15%	7%	3%
Females DE	25%	70%	40%	26%	14%	1%	4%



0-24%



25-49%

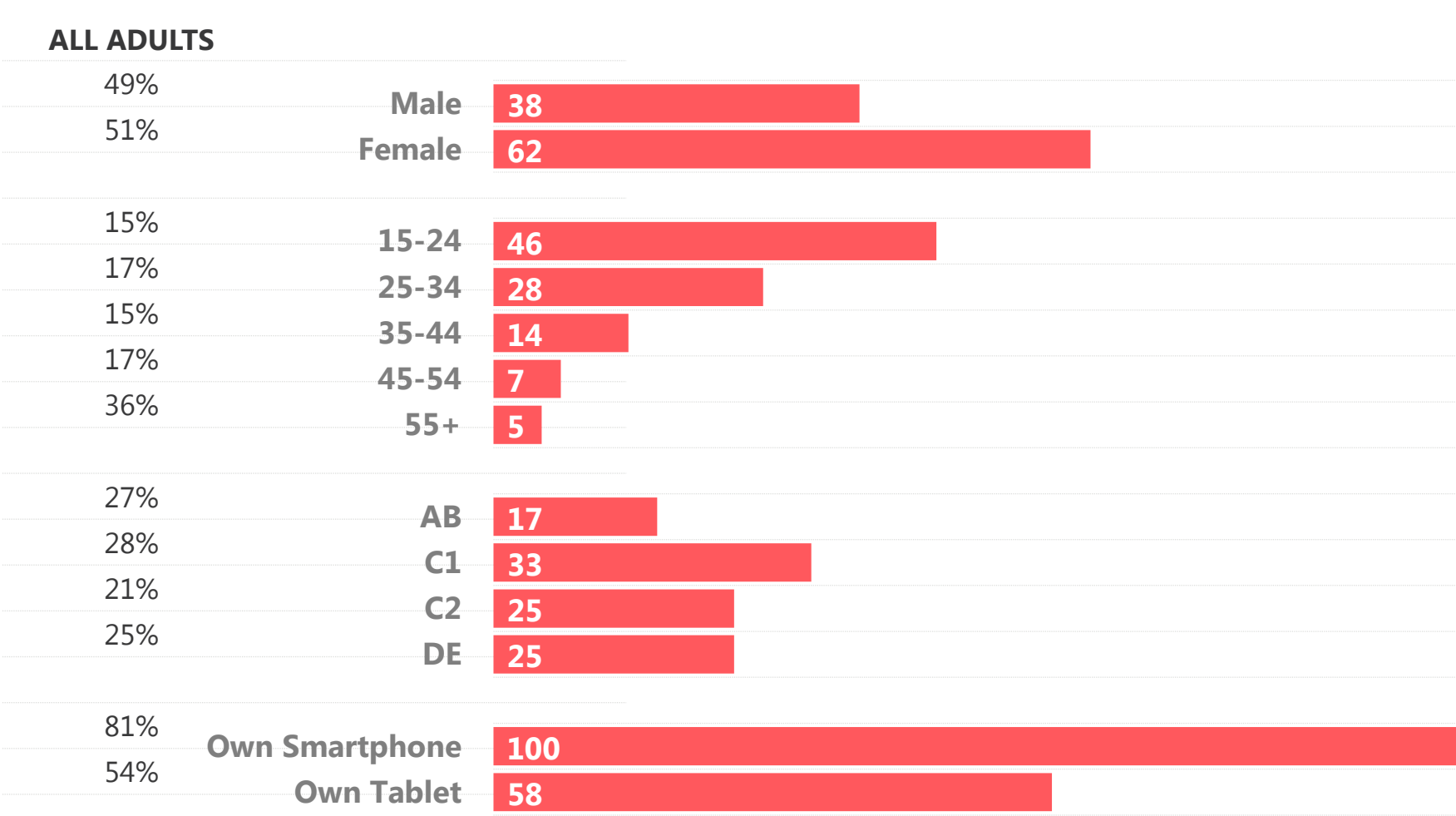


50-100%

Base: circa 4,000 GB adults aged 15+: Q2-4 2017, Q1 2018

Source: Ipsos MORI

Snapchat has the youngest users, and highest proportion of female users of all social media sites



Almost half of all Snapchat users are aged 15-24, with half of users being ABC1.

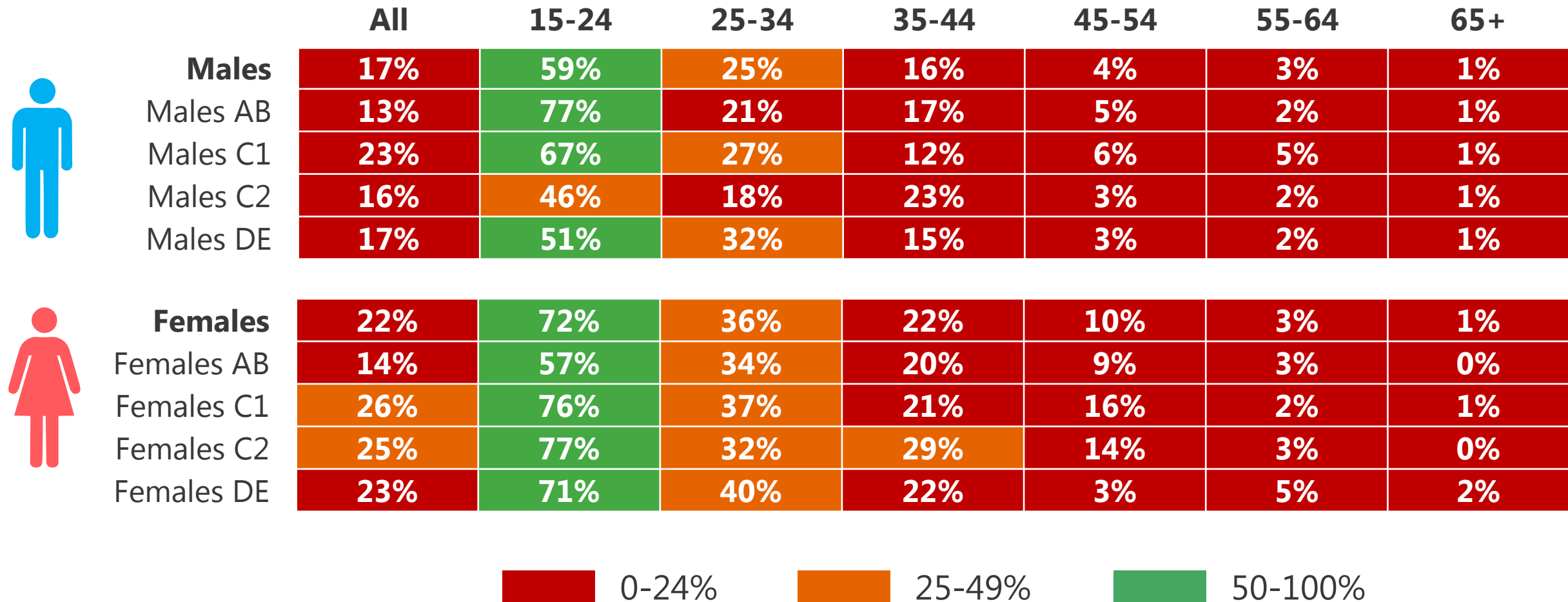
Snapchat functionality also lends itself to universal smartphone ownership.

Base: circa GB adults (1,000) / All visiting / using Snapchat in last 3 months (187) Q1 2018

Source: Ipsos MORI

The majority of Snapchat users are females aged 15-24

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



Base: circa 4,000 GB adults aged 15+: Q2-4 2017, Q1 2018

Source: Ipsos MORI

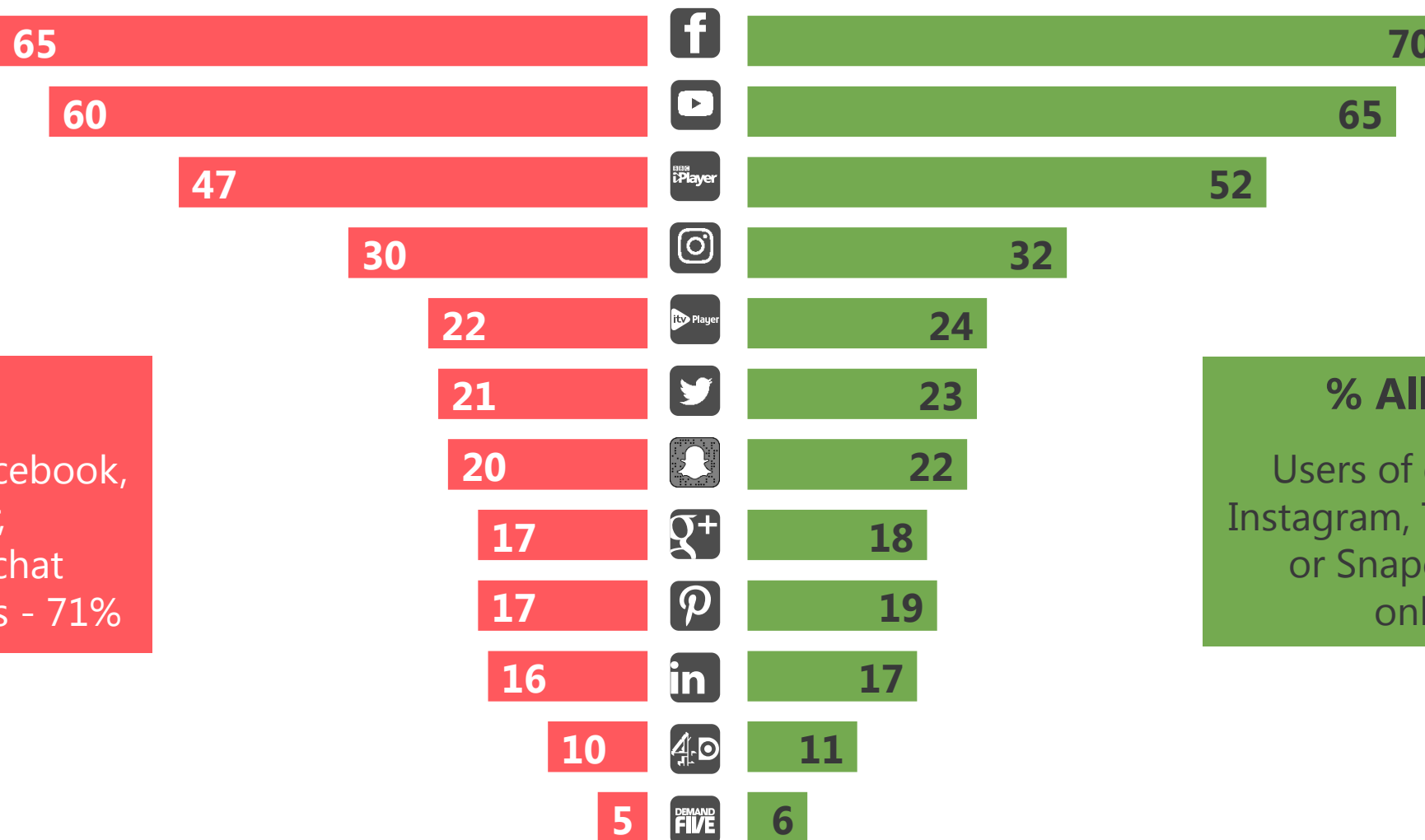
Websites visited or used in the last 3 months

% VISITED IN LAST 3 MONTHS



% All adults

Users of either Facebook, Instagram, Twitter, LinkedIn, or Snapchat amongst all adults - 71%



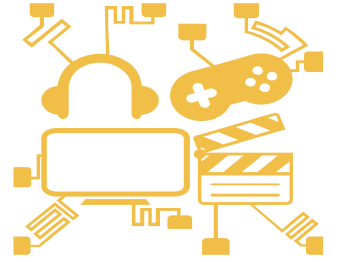
% All online adults

Users of either Facebook, Instagram, Twitter, LinkedIn, or Snapchat amongst all online adults - 77%

Base: circa GB adults 1,000 adults aged 15+: Q1 2018

Base: 901 GB online adults aged 15+: Q1 2018

Source: Ipsos MORI

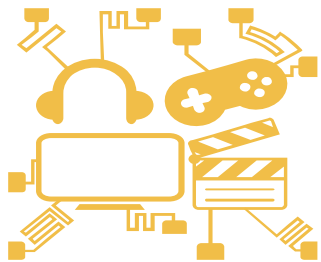


CONTENT CONSUMPTION MUSIC / GAMES / TV / MOVIES

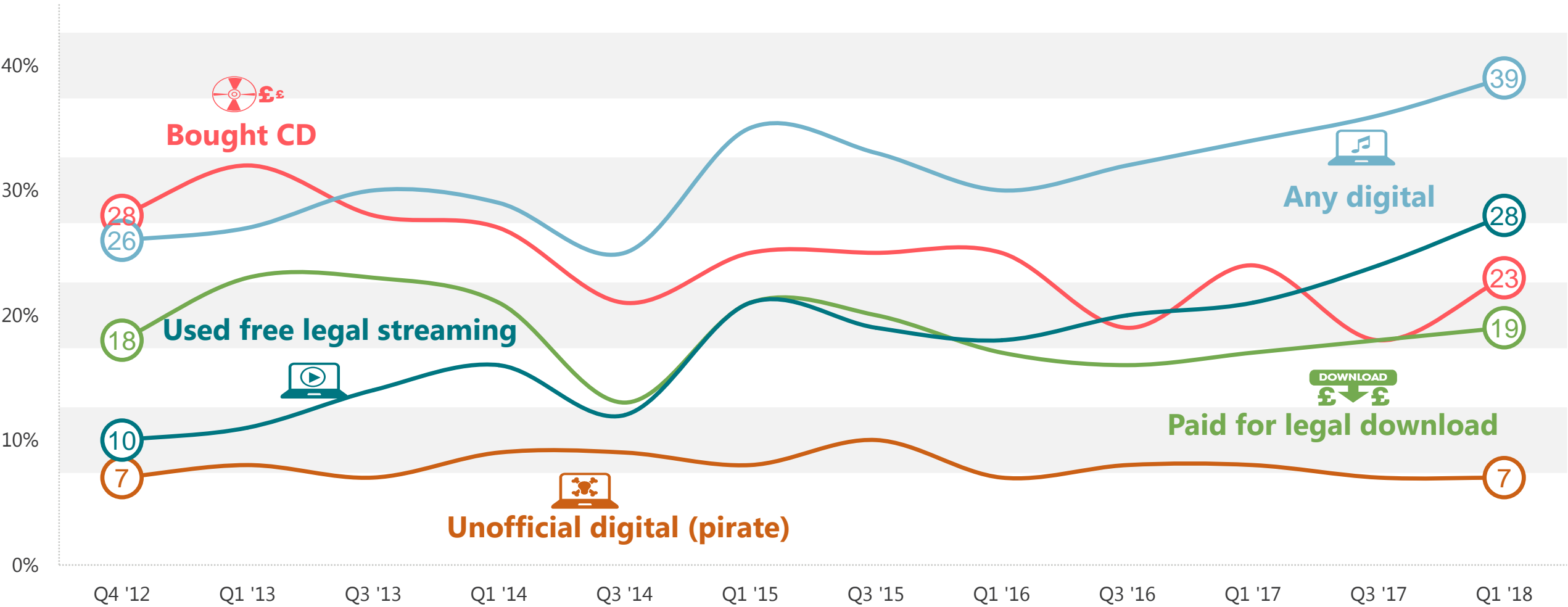


Ipsos Connect

Digital continues to lead music consumption, up 7 percentage points vs. this time last year



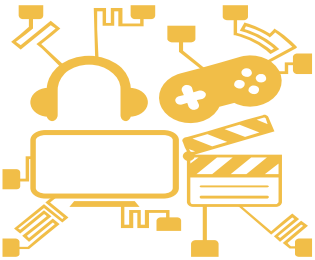
MUSIC CONSUMPTION



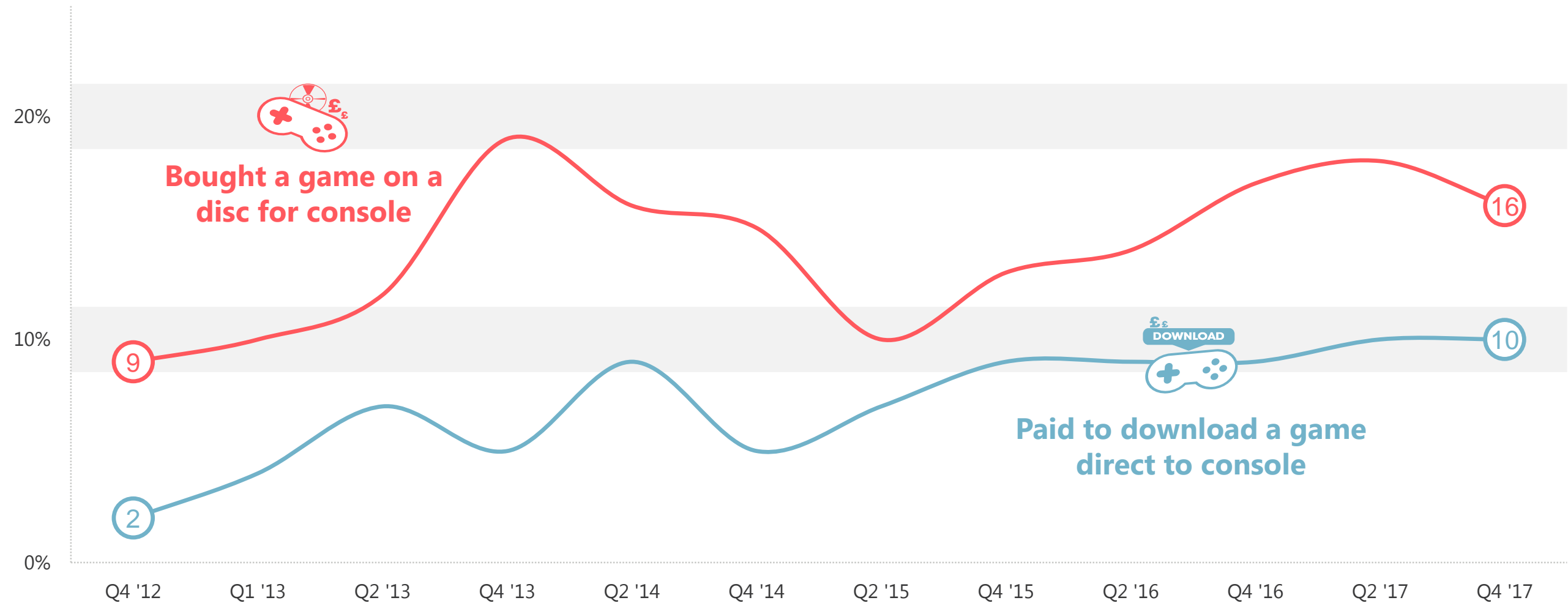
Base: circa 1,000 GB adults aged 15+ per wave / Music consumption is tracked every 6 months

Source: Ipsos MORI

Downloaded games continue to lag as the preferred method for games consumption



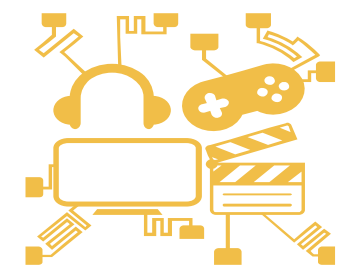
GAMES CONSUMPTION



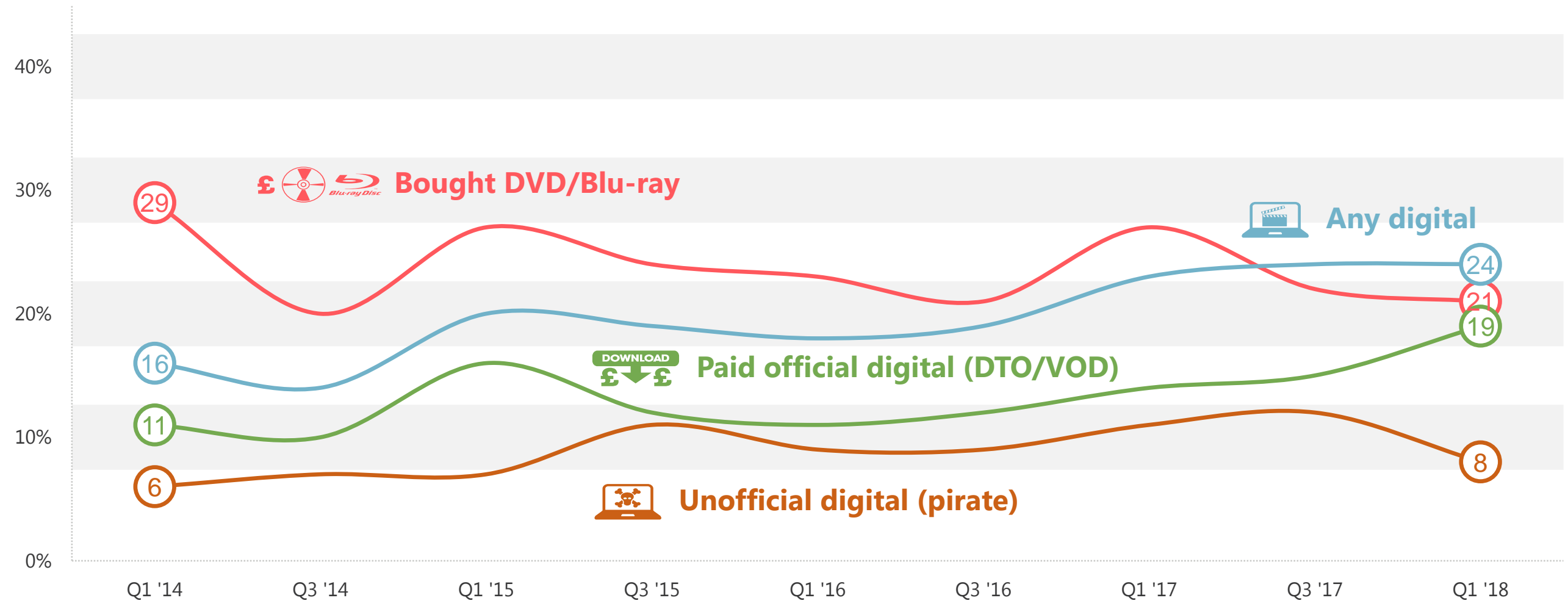
Base: circa 1,000 GB adults aged 15+ per wave / Games consumption is tracked every 6 months

Source: Ipsos MORI

People are now more inclined to 'go digital' when it comes to movie consumption



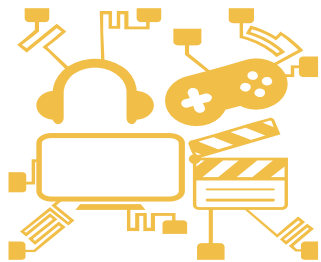
MOVIE CONSUMPTION



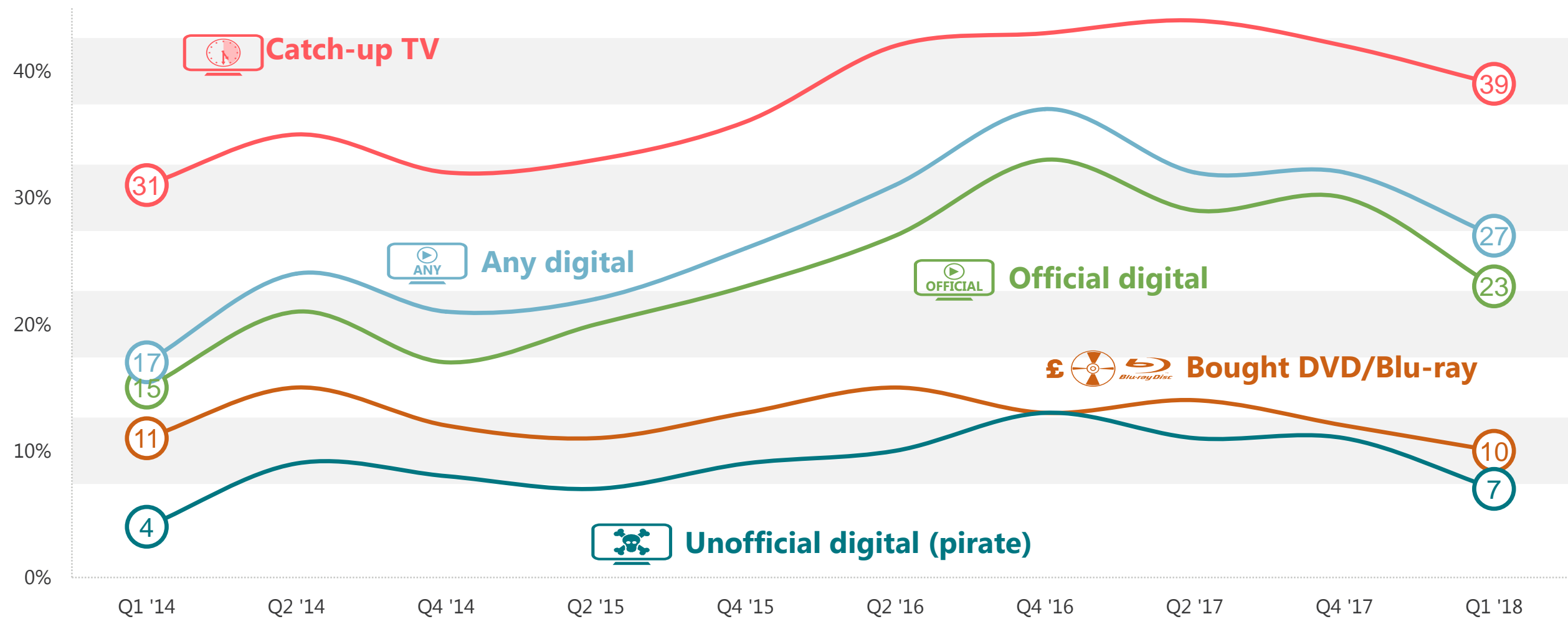
Base: circa 1,000 GB adults aged 15+ per wave / Movie consumption is tracked every 6 months

Source: Ipsos MORI

4 in 10 watch TV series via catch-up, with 3 in 10 use official digital sources



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 **1009 adults aged 15+ in GB**
- The latest interviews were carried out face to face
2nd – 9th February 2018
- 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.

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