



Ipsos MORI



CELEBRATING 20 YEARS

Q3 2018

Areas Covered

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 2018
(Field 18th-25th July)

REPRESENTATIVE SAMPLE OF
c.1000 per wave GB ADULTS
AGES 15+



Smartphone
Deepdive



Internet usage



Connected Home



Tablet ownership

Summary

Smartphone ownership remains stable throughout 2018. However, recent technology updates show fewer shipments were made in the last quarter of 2017 than during the same time in 2016 (down 6.3%). Along with the introduction of new technology such as voice-activated speakers, smart watches and VR headsets the technology market is more diverse than ever.

Tech Tracker shows smartphone ownership is very high, with 8 in 10 GB adults owning one. Ownership is equally high amongst males and females, though lower amongst those aged 55 and over and of a DE social grade.

People tend to use their smartphones for a range of activities such as checking emails which ranks above all others.

15-24s are more likely to do any activity on their smartphone from sending emails, to online banking, and browsing the internet for personal interests, than the typical GB smartphone owner. However, our [2017 Almanac](#) highlights that people think they spend too much time on their smartphone (68%) – particularly those aged 18-24 (79%).

On average, people have 2 smartphones in their household. This rises to 2.7 in households with children, and 1.8 in households without - representing a significant uplift in households with children. iPhones (43%) and Samsung (25%) smartphones are most common and almost a quarter of mobile phone owners (smartphone or feature phone) are on the EE network.



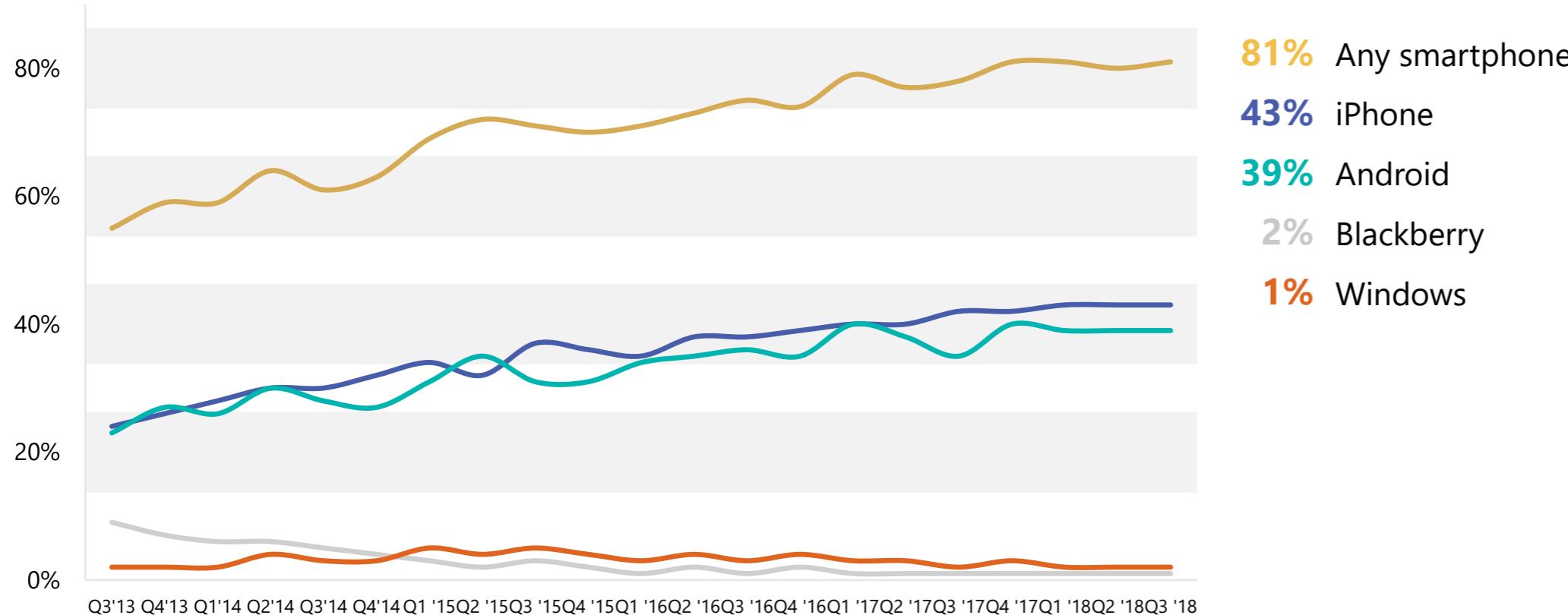


Smartphone Ownership

Smartphone ownership has plateaued since Q4 '17, and everyone who wants a smartphone now has one



The past 4 quarters show stability by operating system and little movement since Q4 '17. Windows remains the least favoured while iPhone retains a slight lead over Android.



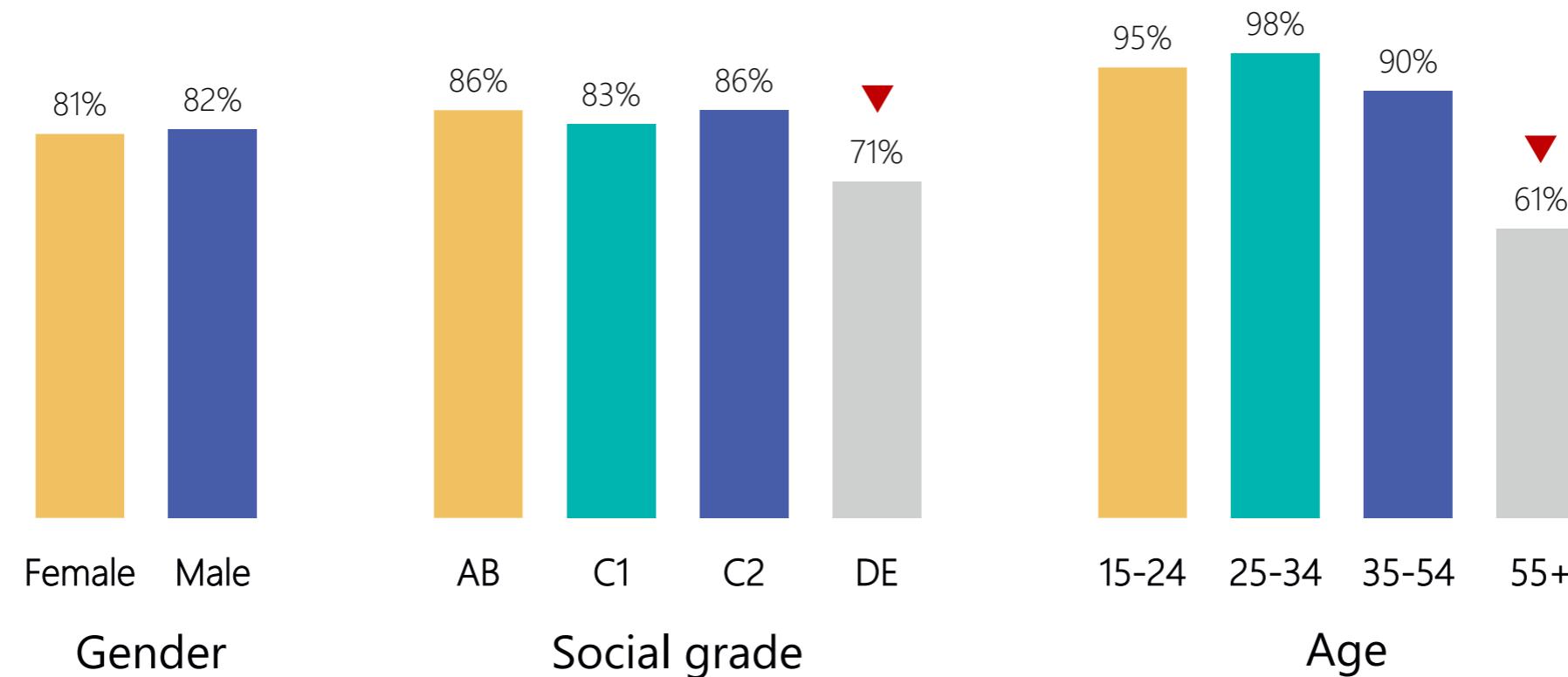
Base: c.1,000 per wave GB adults aged 15+

Source: Ipsos MORI

8 in 10 GB adults own any smartphone, with ownership equally high amongst males and females



However, differences are seen at an age and social grade level, where ownership is lower among DEs and 55+, and higher amongst those aged 25-34



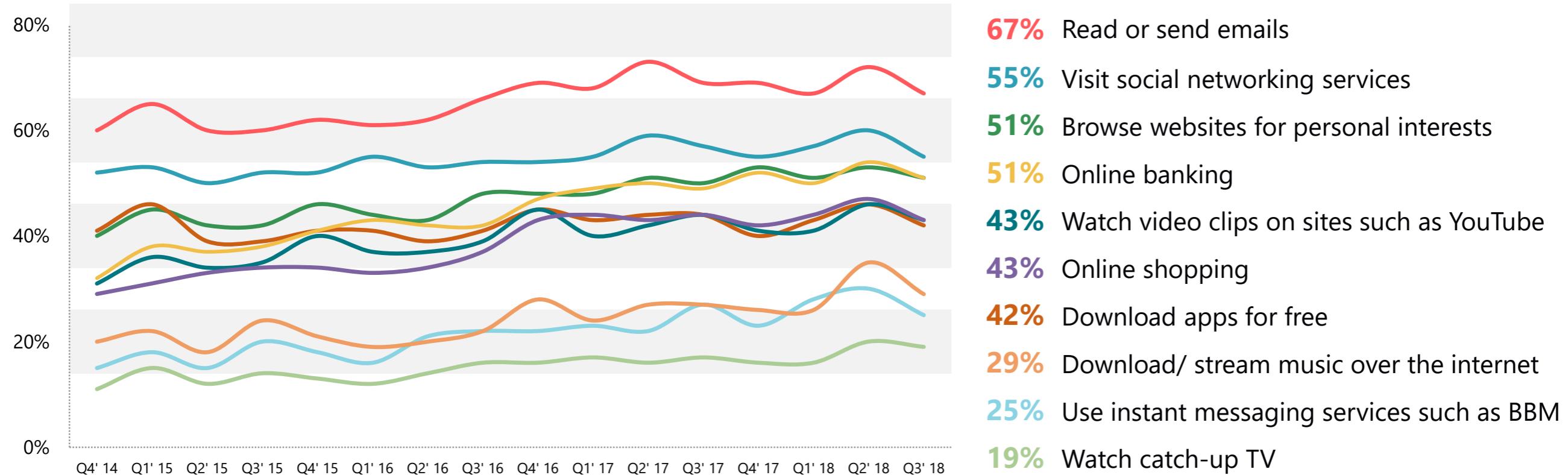
▲▼ Significantly higher / lower @ 95% confidence level

Base: 1013 Q3 2018 GB adults aged 15+
Source: Ipsos MORI

Smartphone owners complete a range of activities on their smartphones, with accessing emails ranked as the single most popular activity



Social networking, browsing the web and online banking are popular activities, with around half of people doing these when connecting to the internet via their smartphone. Users are also significantly more likely to watch video clips (43%) than catch-up TV (19%) on their smartphone



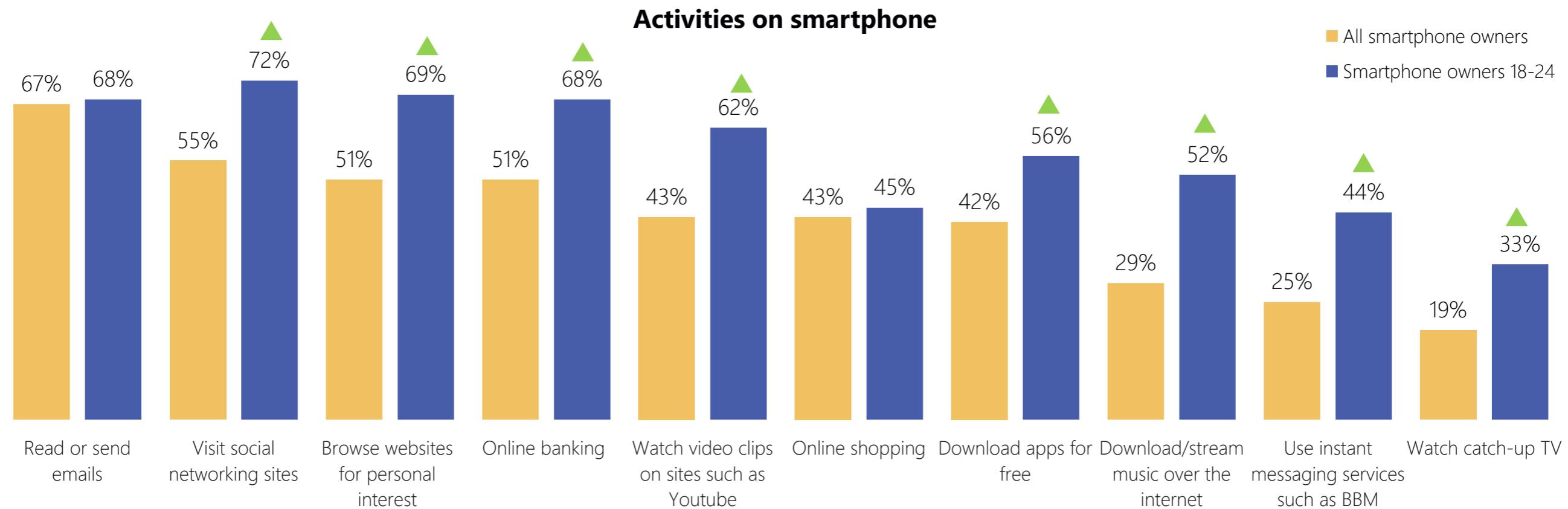
Base: ci.600-800 per wave GB adults aged 15+ Smartphone owners

Source: Ipsos MORI

18-24 year olds are significantly more likely to do various activities on their smartphone than the average GB smartphone owner



This includes visiting social networks, browsing websites, banking, watching video clips and downloading free apps

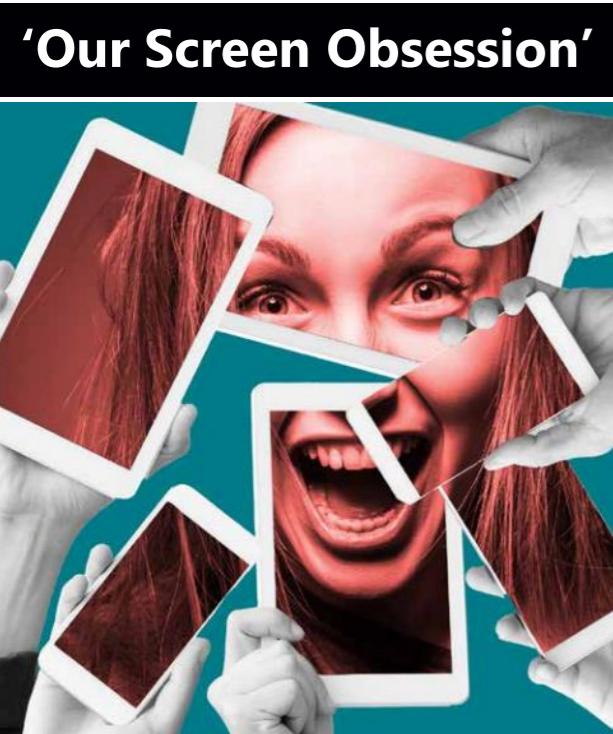


▲ ▼ Significantly higher / lower @ 95% confidence level

Base: Q3 '18 1013 GB Adults aged 15+ Smartphone owners (791) 18-24 (105)

Source: Ipsos MORI

Findings from other Ipsos studies have indicated that people think they spend too much time on their smartphones, particularly those aged 18-24

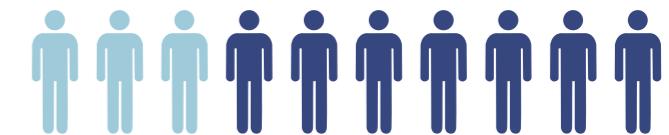


As featured in...



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68% of people in Britain agree that they spend too much time looking at their phones...



...which rises to 79% among 18-24s

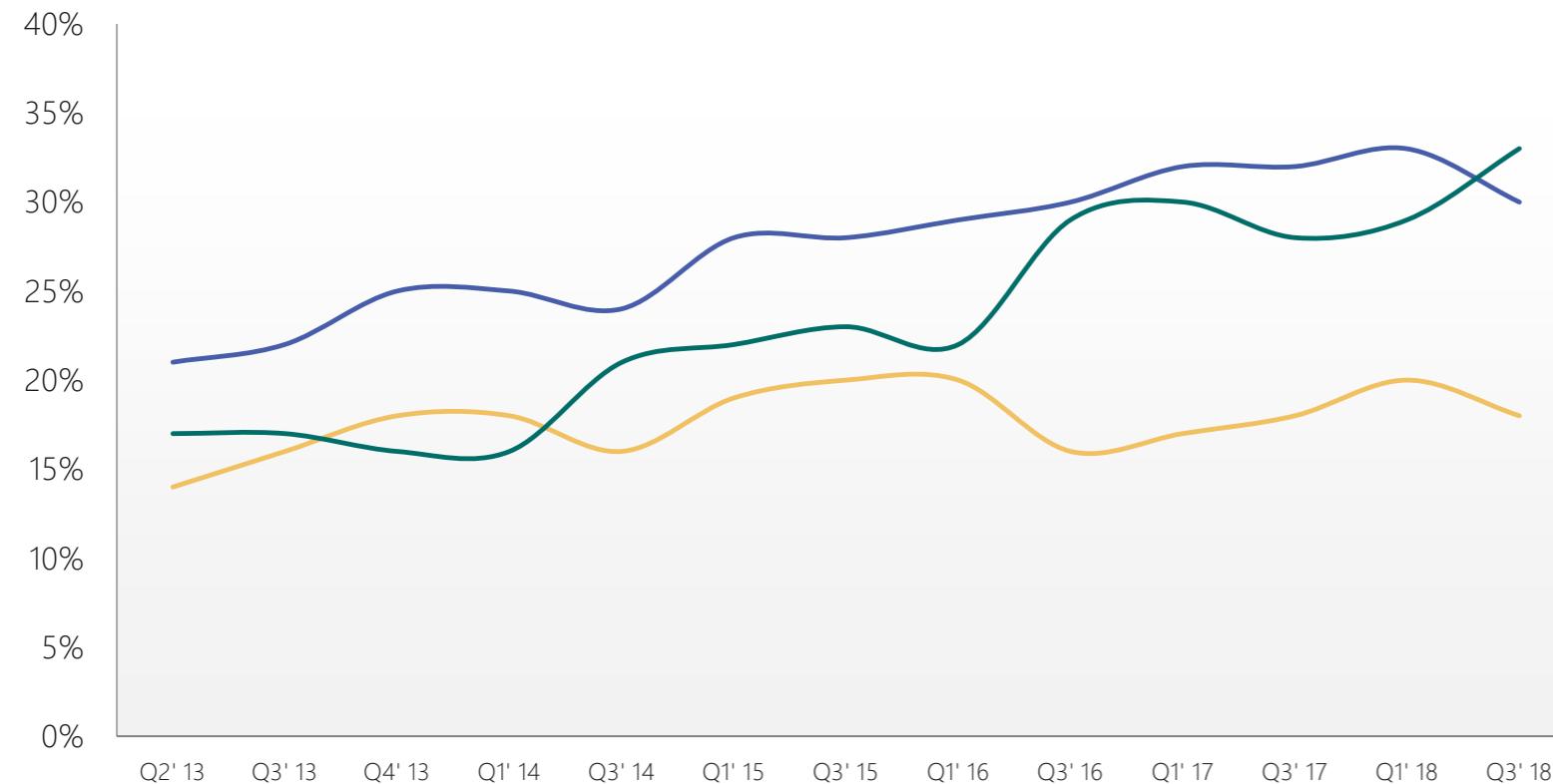


Source: Ipsos MORI

The average GB household has 2 smartphones, with more than 3 in 5 people having two or more smartphones in their home



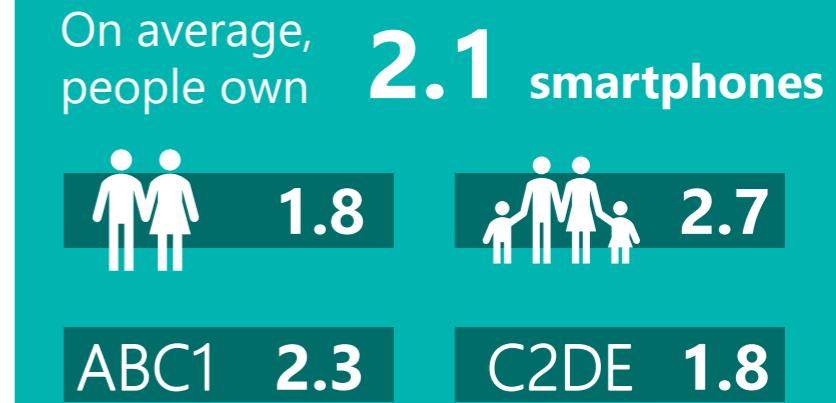
Ownership of 3+ smartphones is at its highest this quarter (33%), up 4 percentage points since Q1 '18, with fewer people only having 1 smartphone in their household. The average smartphone per house is 2.7 among those with children and lower among those without – 1.8. ABC1s typically have 2.3 smartphones in the home versus 1.8 for C2DEs



33% 3+ smartphones

30% 2 smartphones

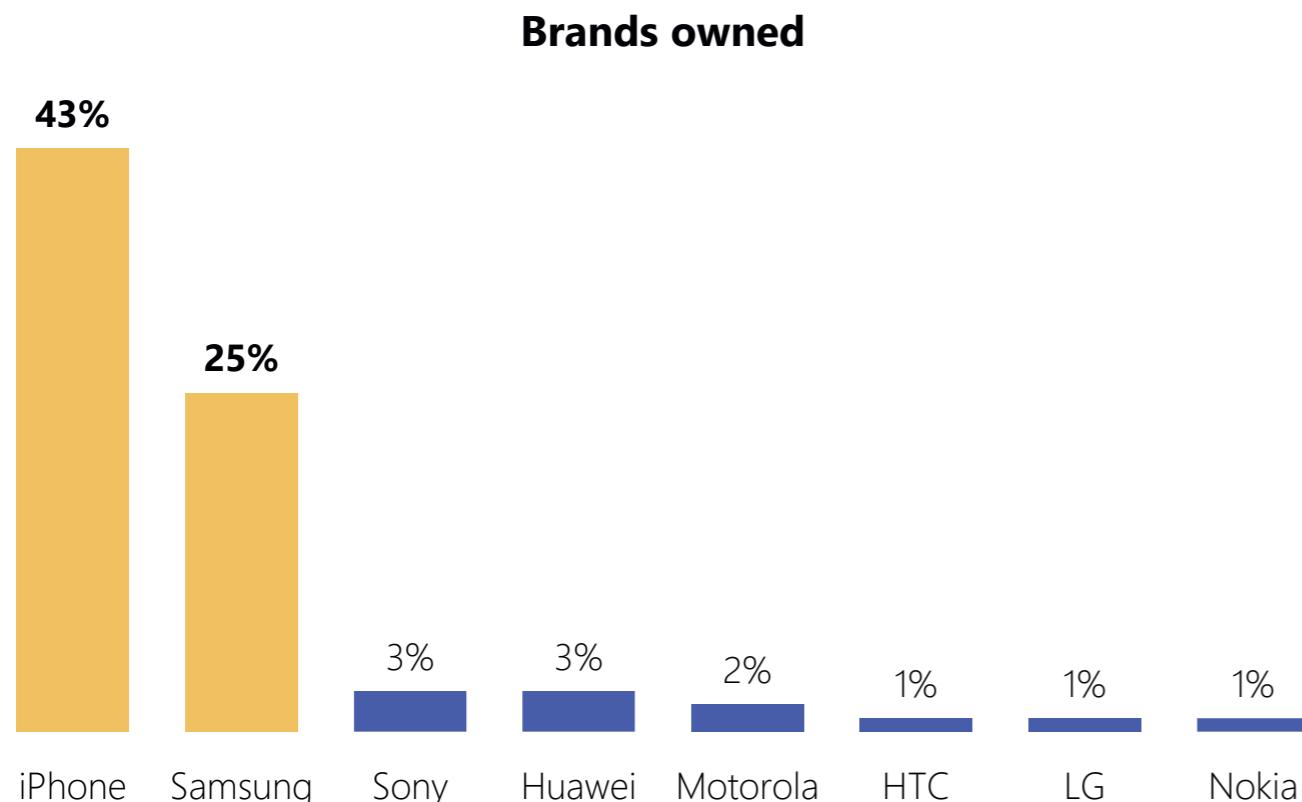
18% 1 smartphone



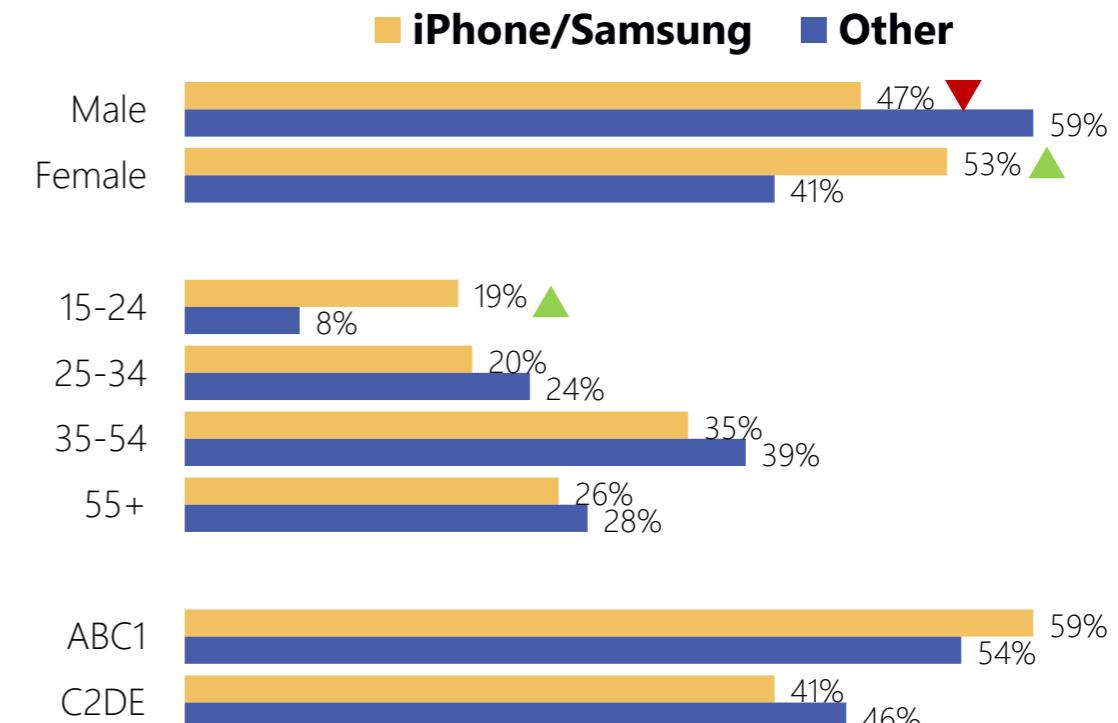
2 in 5 GB adults own an iPhone and a quarter own a Samsung smartphone. Ownership of other brands is made up of Sony, Huawei, Motorola, HTC, LG and Nokia



During Q3 '18, owners of iPhone or Samsung phones are more likely to be female and aged 15-24 than those who own a smartphone from a different manufacturer. However, with the upcoming smartphone innovations such as foldable screens and wireless charging, we may see further diversification of brands owned over the next 12 months



▲▼ Significantly higher / lower than Other @ 95% confidence level



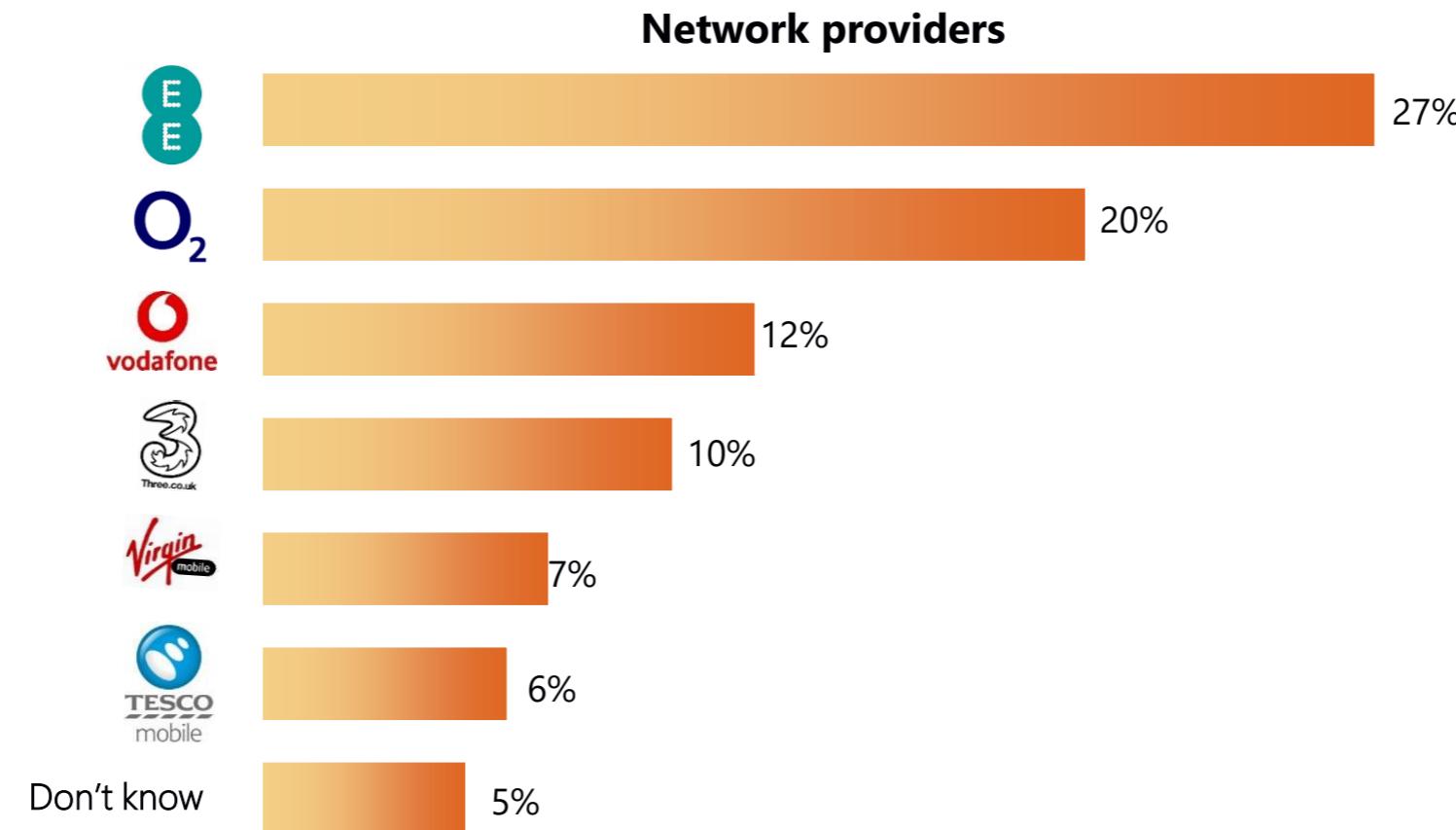
Base: c.1,000 per wave GB adults aged 15+ iPhone/Samsung owners (642); Other smartphone owners (155)

Source: Ipsos MORI

Just over a quarter of mobile phone owners use the Everything Everywhere (EE) network, with a 1 in 5 using O2



Currently, the other most popular networks among GB mobile phone owners are Vodafone, Three, Virgin and Tesco Mobile



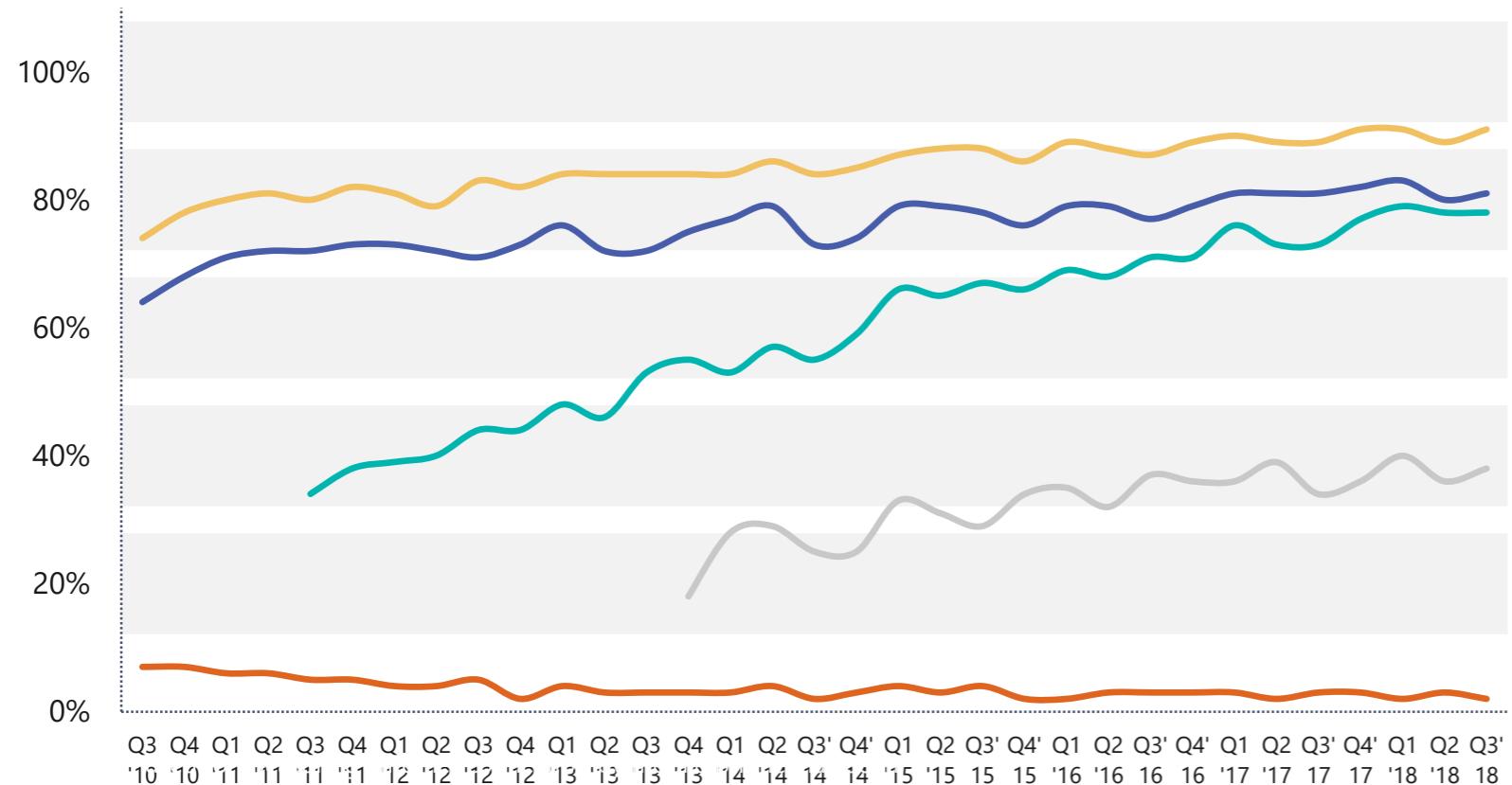


Internet Usage

9 in 10 GB adults access the internet anywhere, with mobile phone connectivity up 5% points vs. this time last year



Connectivity via a mobile phone is just as likely as connectivity via in-home broadband (8 in 10), whilst 4 in 10 connect to the internet via a tablet



91% Internet usage anywhere

81% Broadband at home

78% *Connect using mobile phone

38% Connect via Tablet

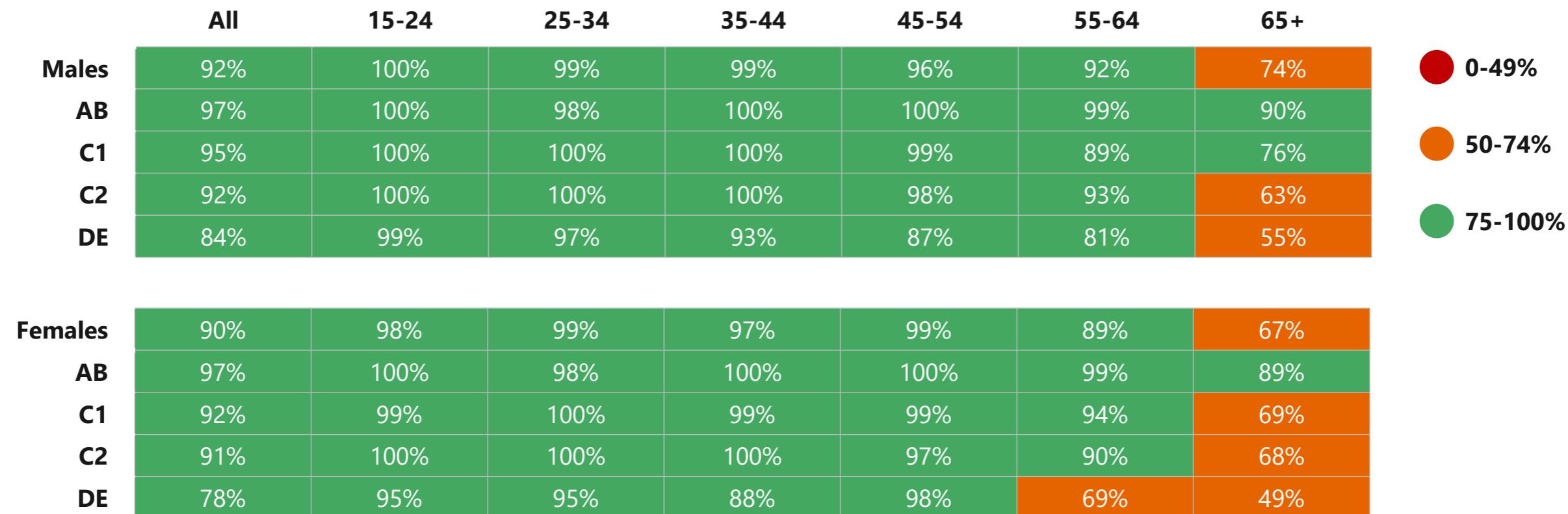
2% Connect via Dongle

* 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

Internet access is virtually universal across all people aged 15-54, then tails off very slightly among those aged 55-64 and even more so among the 65+ age group



Internet connectivity by demographic

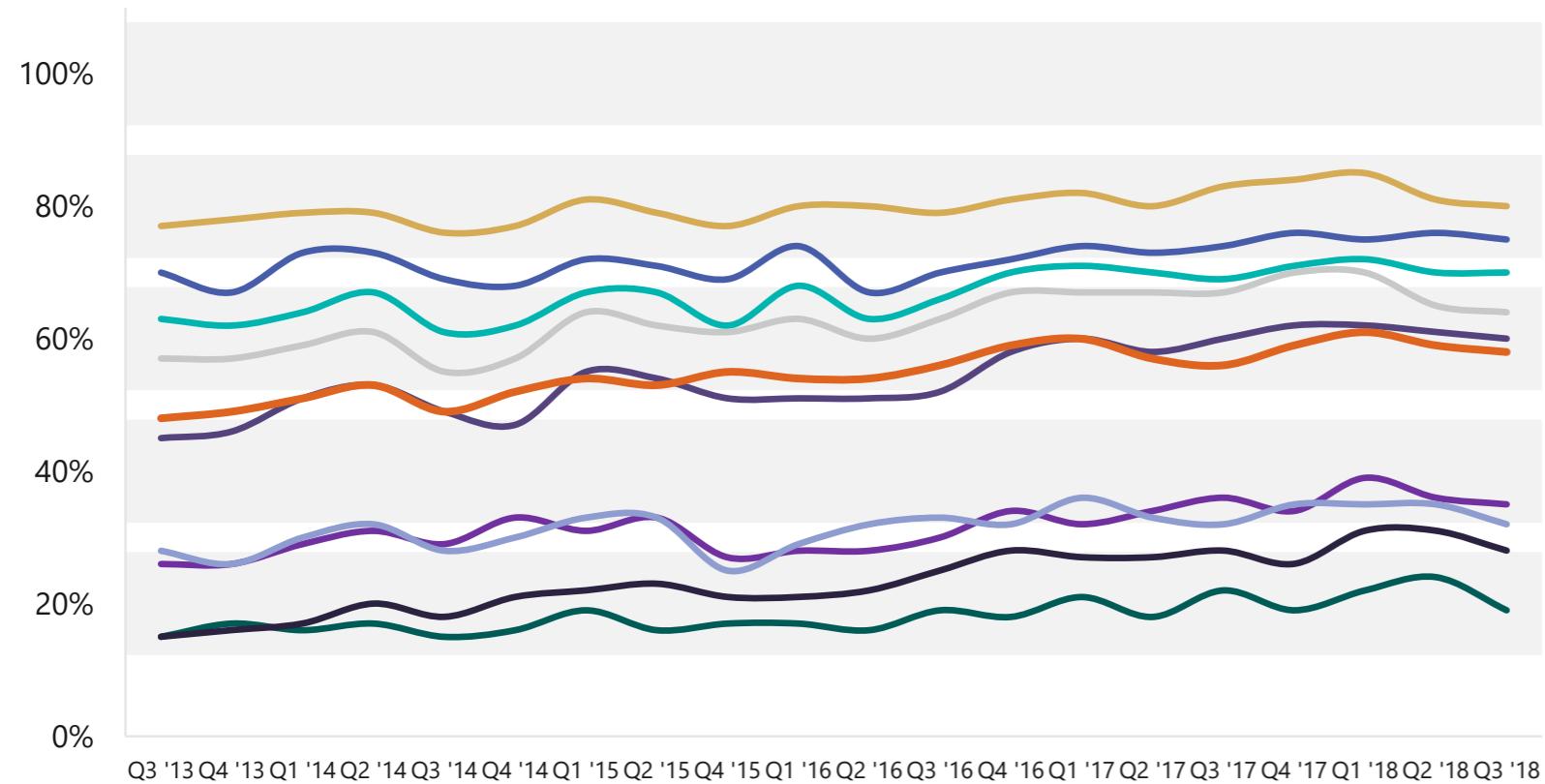


Sending and receiving emails remains the single most common activity when using the internet



% Use of the internet in the past 3 months

Not asked in Q3 2015



- 80%** Sending or receiving emails
- 75%** Visit sites for info personal interests
- 70%** Visit sites for info on products thinking of buying
- 64%** Visit sites to buy products online
- 60%** Check bank account/ other financial holdings
- 58%** Social networking
- 35%** Download/ stream music
- 32%** Download/ stream TV
- 28%** Download/ stream movies
- 19%** Play video games online



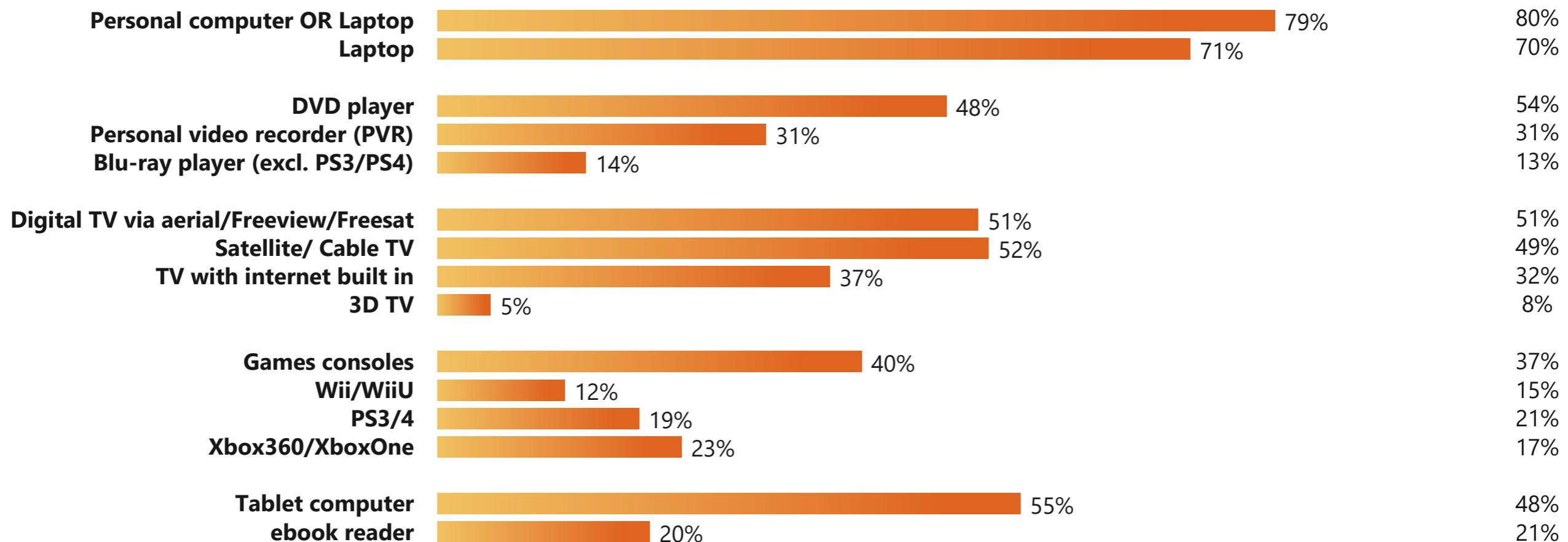
Connected Home

8 in 10 GB adults have a PC or laptop in their home. Over half have a tablet, whilst 4 in 10 have a games console in their household



Which of the following do you own/have in your household?

Q3 '17



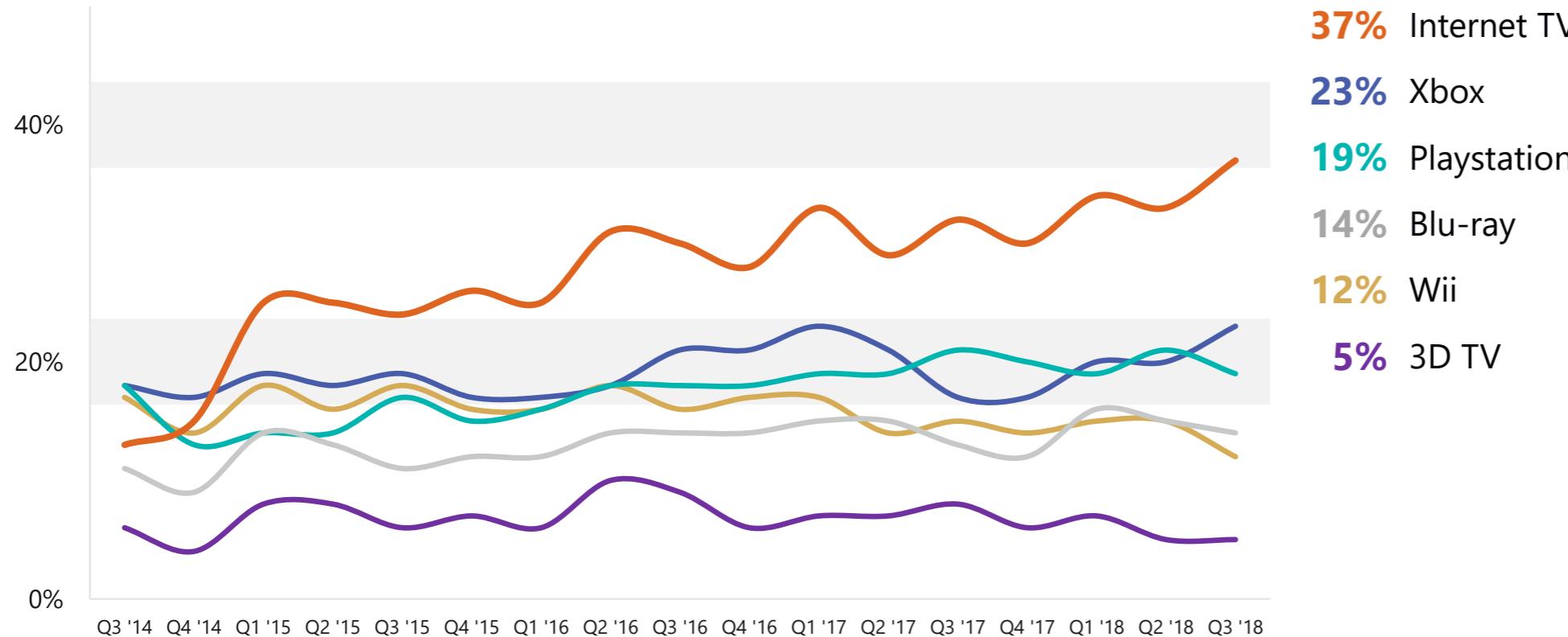
Base: c.1000 per wave GB adults aged 15+

Source: Ipsos MORI

More people are owning internet enabled TV and Xbox 360/One during Q3 '18, while Wii/Wii U is declining compared to Q3 '17



Which of the following do you own/have in your household?



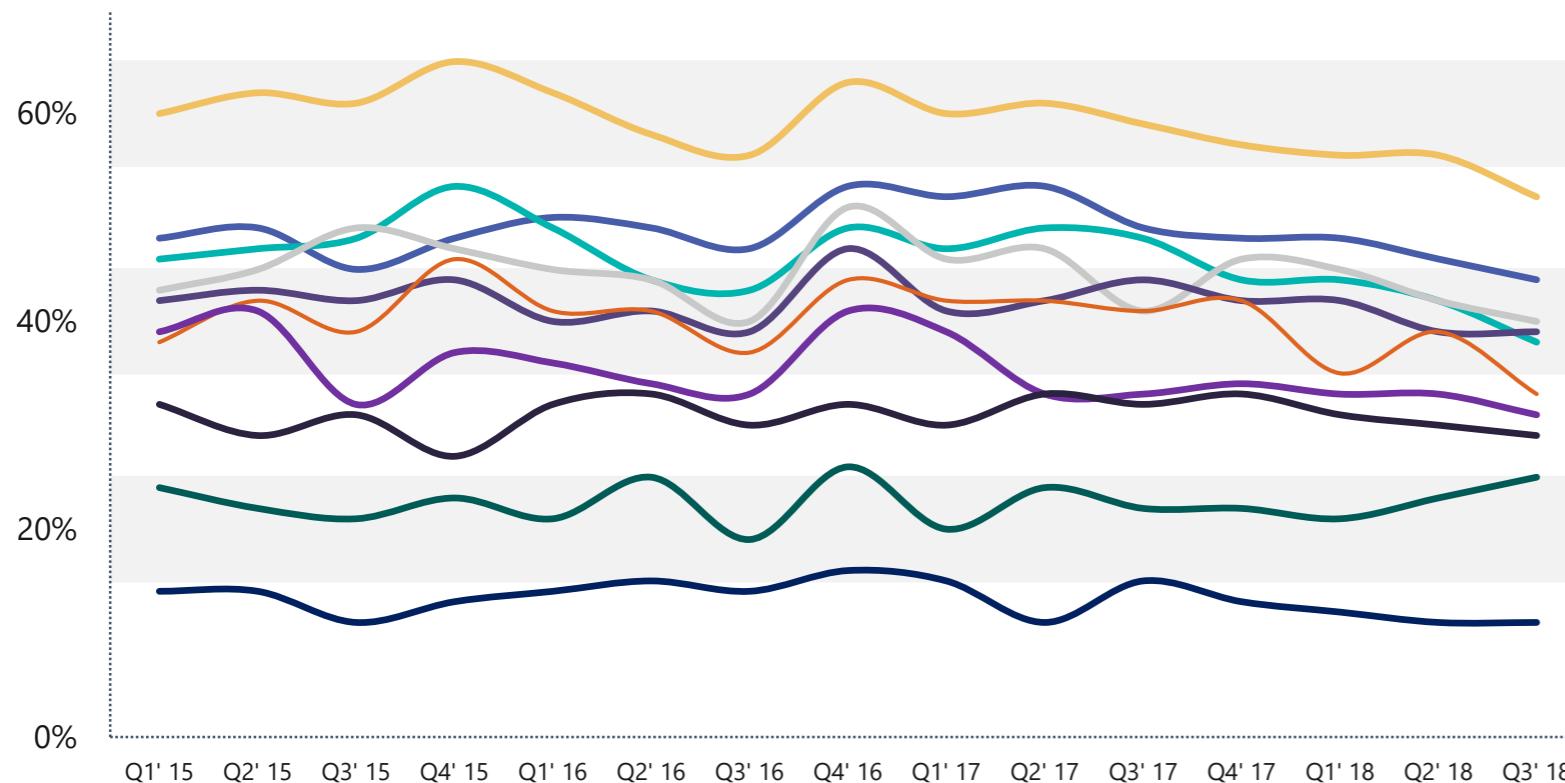


Tablet Ownership

Tablet ownership is at 55%. Similarly to smartphones, reading or sending emails is the most common activity performed on tablets, followed by browsing websites for personal interests



Use of tablet in the past 3 months



- 52% Read or send emails
- 44% Browse websites for personal interests
- 40% Online shopping
- 39% Watch video clips on sites such as YouTube
- 38% Visit social networking services
- 33% Online banking
- 31% Download apps for free
- 29% Watch catch-up TV
- 25% Download/ stream music over the internet
- 11% Use the internet to make video calls (VOIP)

**Please contact us if you
would like further data**

Tech tracker technical details

Ipsos MORI interviewed a quota sample of **1,013 adults aged 15+ in GB in Q3 2018**.

The latest interviews were carried out face-to-face **18th-25th July 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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