



Ipsos MORI

TECHNOLOGY TRACKER

CELEBRATING 20 YEARS

Q4 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 4 2018 (field in November)

Representative sample of c.1000 GB adults ages 15+



Tablet deepdive



Internet usage



Connected home

Summary

Tech Tracker tells us that over half of GB adults own a tablet. Whilst ownership has remained stable throughout 2018, it has risen 3 percentage points since Q4 '17 and 6 percentage points since Q4 '16.

Apple's iPad is still the market-leader, with 1 in 3 GB adults owning an iPad; a position it has held since non-iPad ownership matched that of the iPad in Q1 2016. Only 4 in 10 15-24's own a tablet, but they are significantly more likely to own an iPad than a non-iPad tablet – the only age group to show this behaviour.

Adults aged 45-54 are the most likely to own a tablet (71%). Perhaps surprisingly, they are more likely than any other age-group to purchase goods or services via their tablet. They are also more likely to watch videos on their tablet than the majority of other tablet users. However, the likelihood of tablet users playing games and paying to download apps decreases among the older demographic. Among all tablet users, sending and receiving emails is still the most popular activity in Q4 '18.

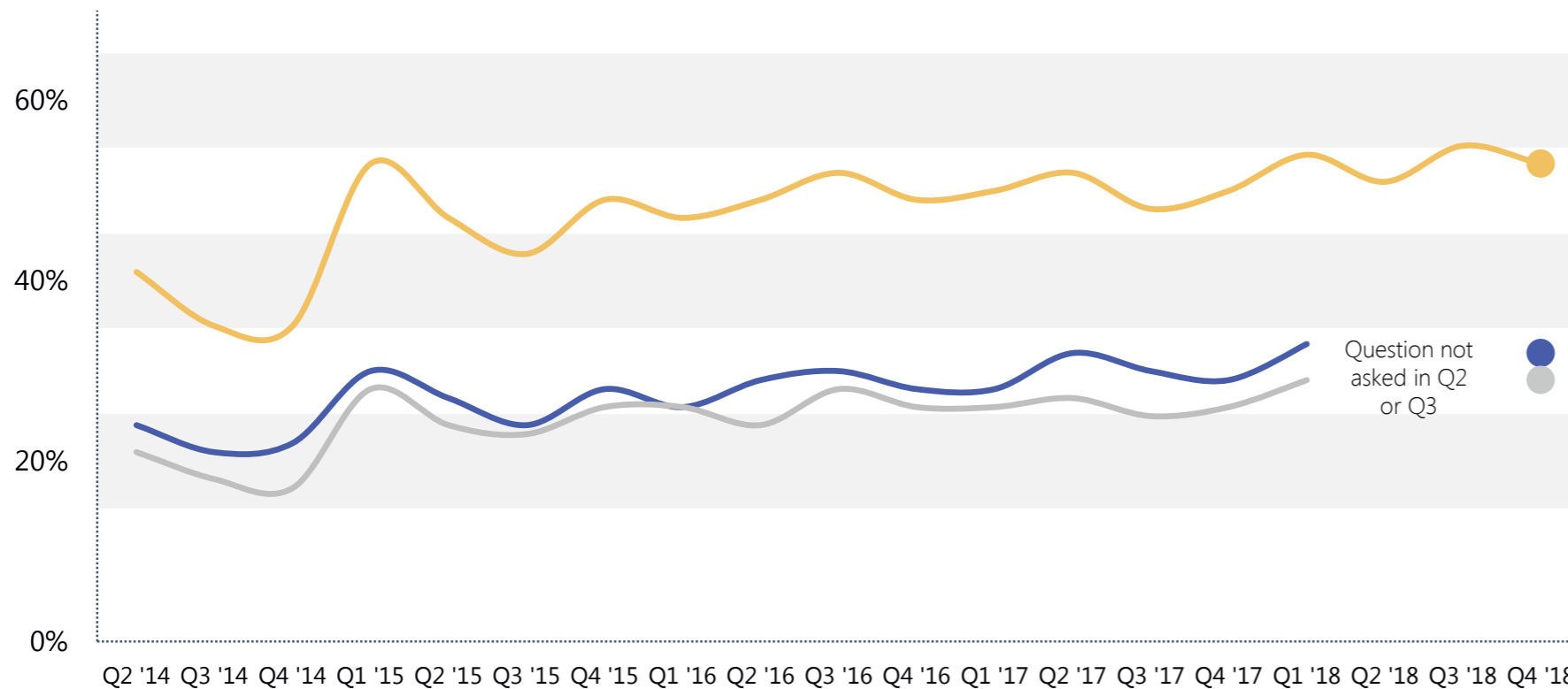
The average household in Britain has 1 tablet (0.93). As we might expect, this increases to 1.4 in households with children and decreases to 0.7 in households without children.





Tablet deepdive

Tablet ownership has remained stable since Q3'16 with Apple's iPad remaining the most popular brand



53% Any Tablet
32% iPad
29% Non-iPad Tablet

* Brand ownership was not asked between Q2 and Q3 2018

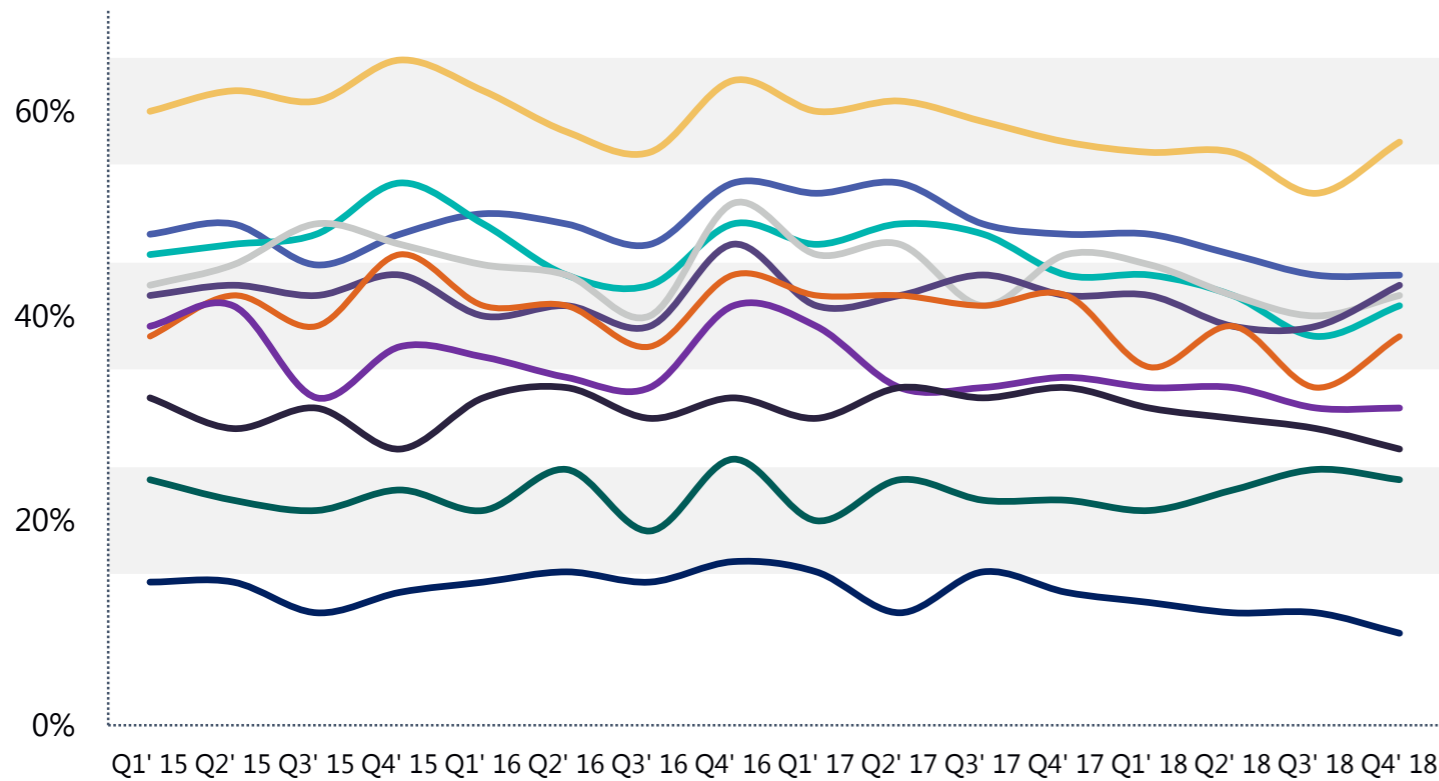
Base: circa 1,000 GB adults aged 15+ per wave

Source: Ipsos MORI

Tablets are used for many activities with reading/sending emails still ranked as the most popular



Use of tablet in the past 3 months

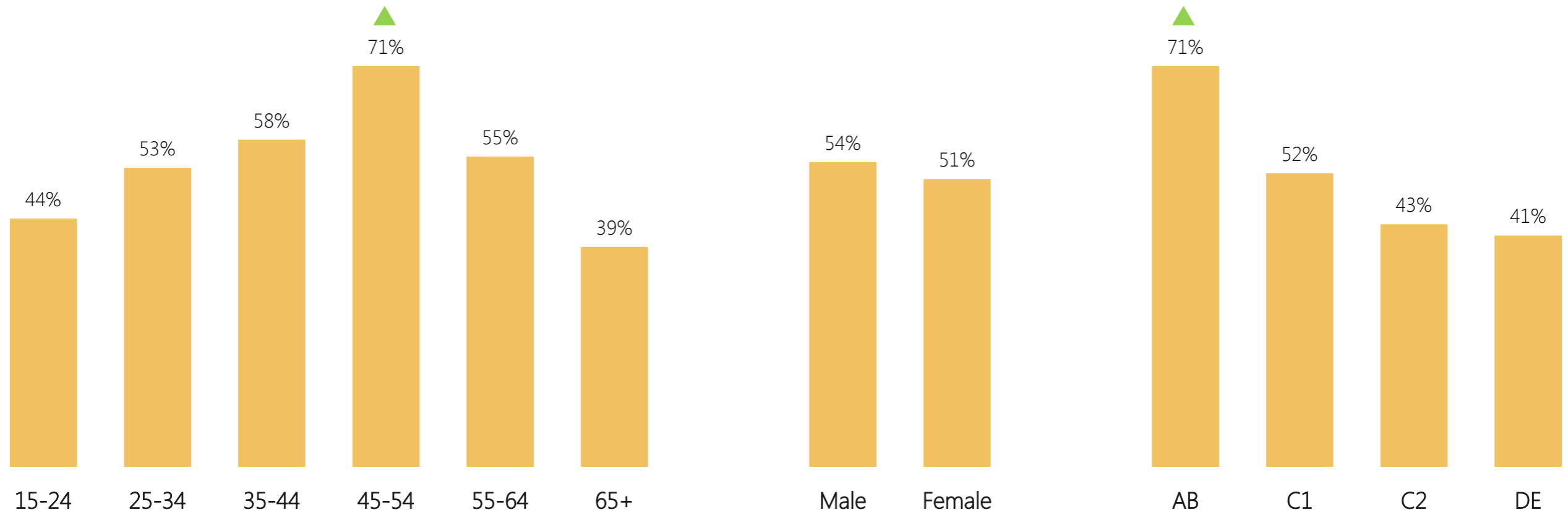


- 57%** Read or send emails
- 44%** Browse websites for personal interests
- 43%** Watch video clips on sites such as Youtube
- 42%** Online shopping
- 41%** Visit social networking sites
- 38%** Online banking
- 31%** Download apps for free
- 27%** Watch catch-up TV
- 24%** Download/ stream music over the internet
- 9%** Using the internet to make video calls (VOIP)

Adults aged 45-54 are significantly more likely to own a tablet than other age groups



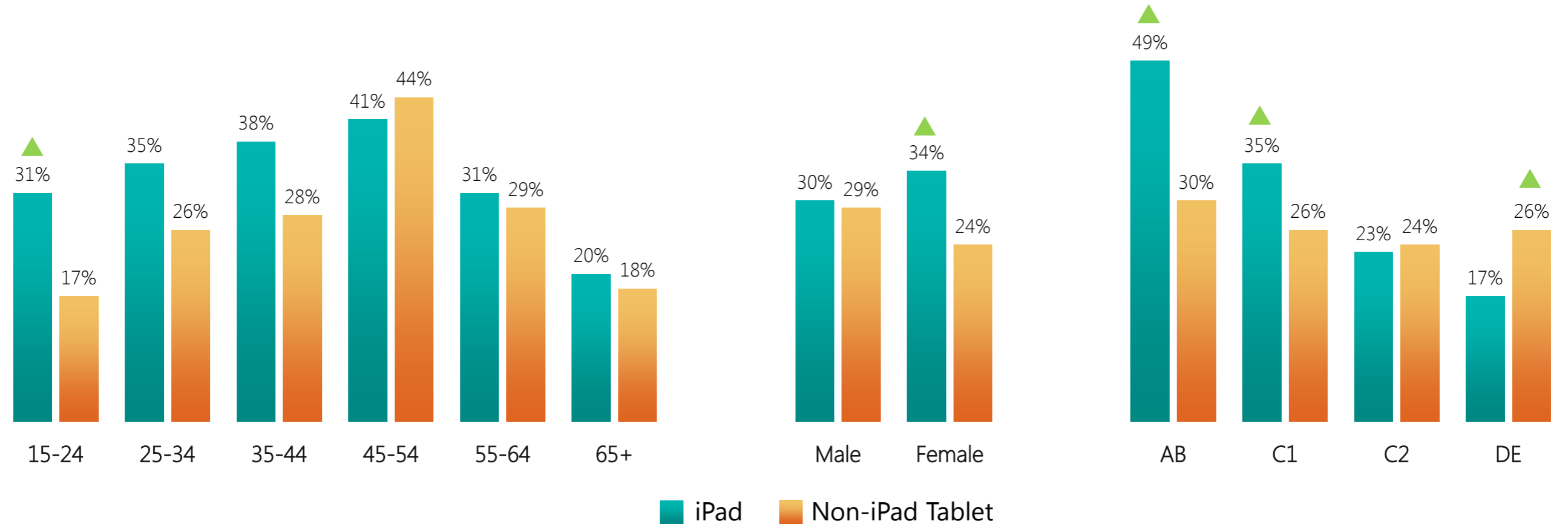
While those in the AB social grades are significantly more likely than other social grades



15-24s are more likely to own an iPad than non-iPad, with the balance towards non-iPads increasing with age



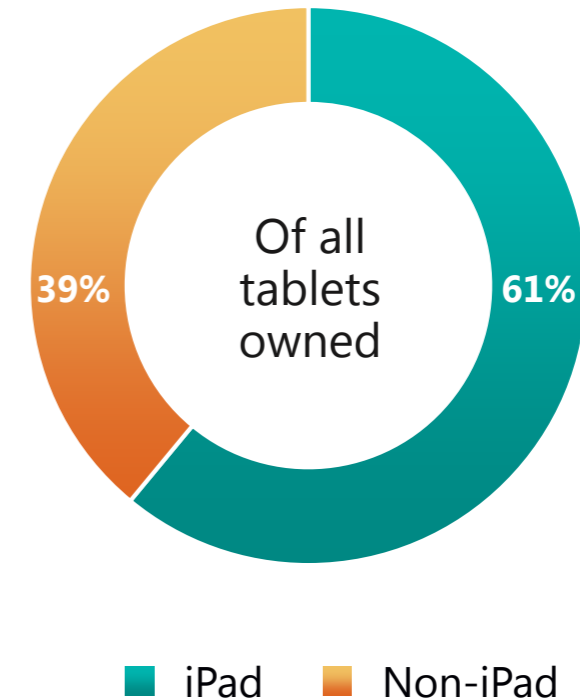
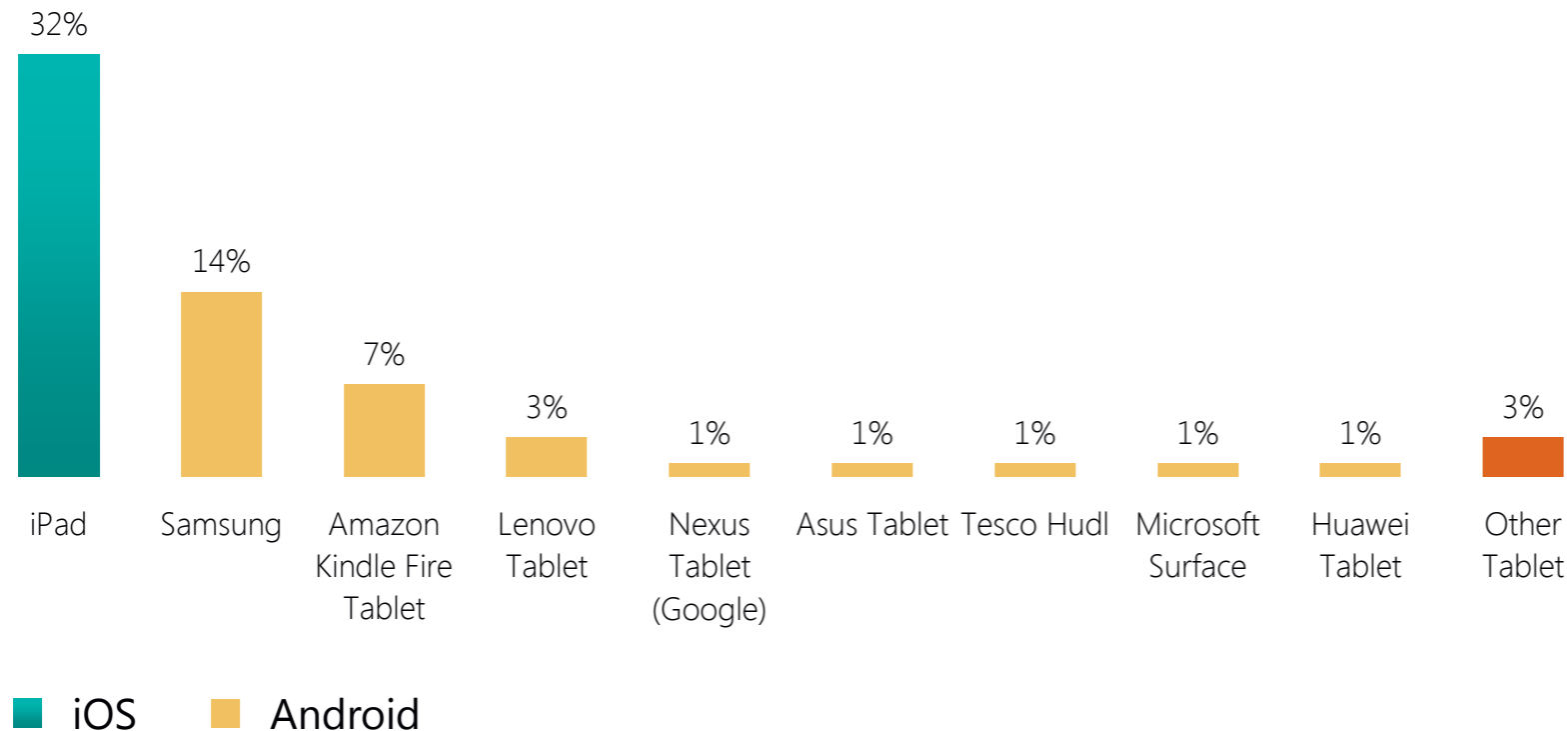
Whilst ownership of iPads and non-iPads among males is level, females prefer Apple's iPad



Apple dominates the tablet market with over twice the share of its nearest competitor Samsung



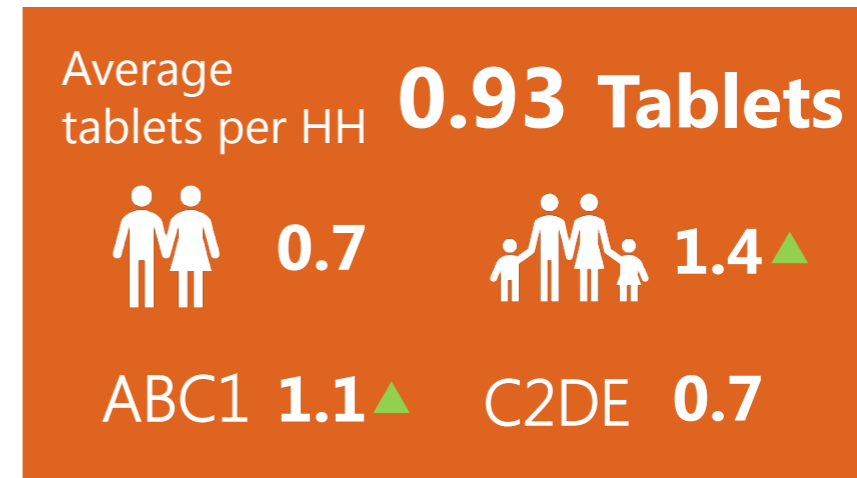
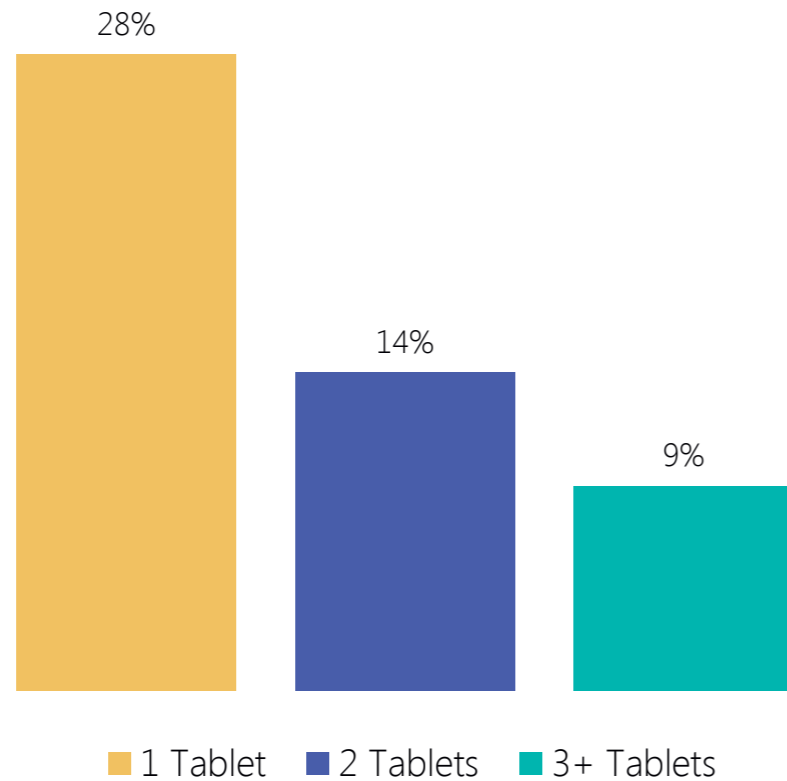
Around a third of all GB adults own an Apple iPad, with 1 in 7 owning a Samsung, the next most popular brand of tablet. 6 in 10 of all tablets owned are Apple iPads.



The average number of tablets in GB households is 0.93 with 24% of households owning more than 1 tablet



Households with children are significantly more likely to own a tablet than households without children, with the average household with children owner 1.4 tablets



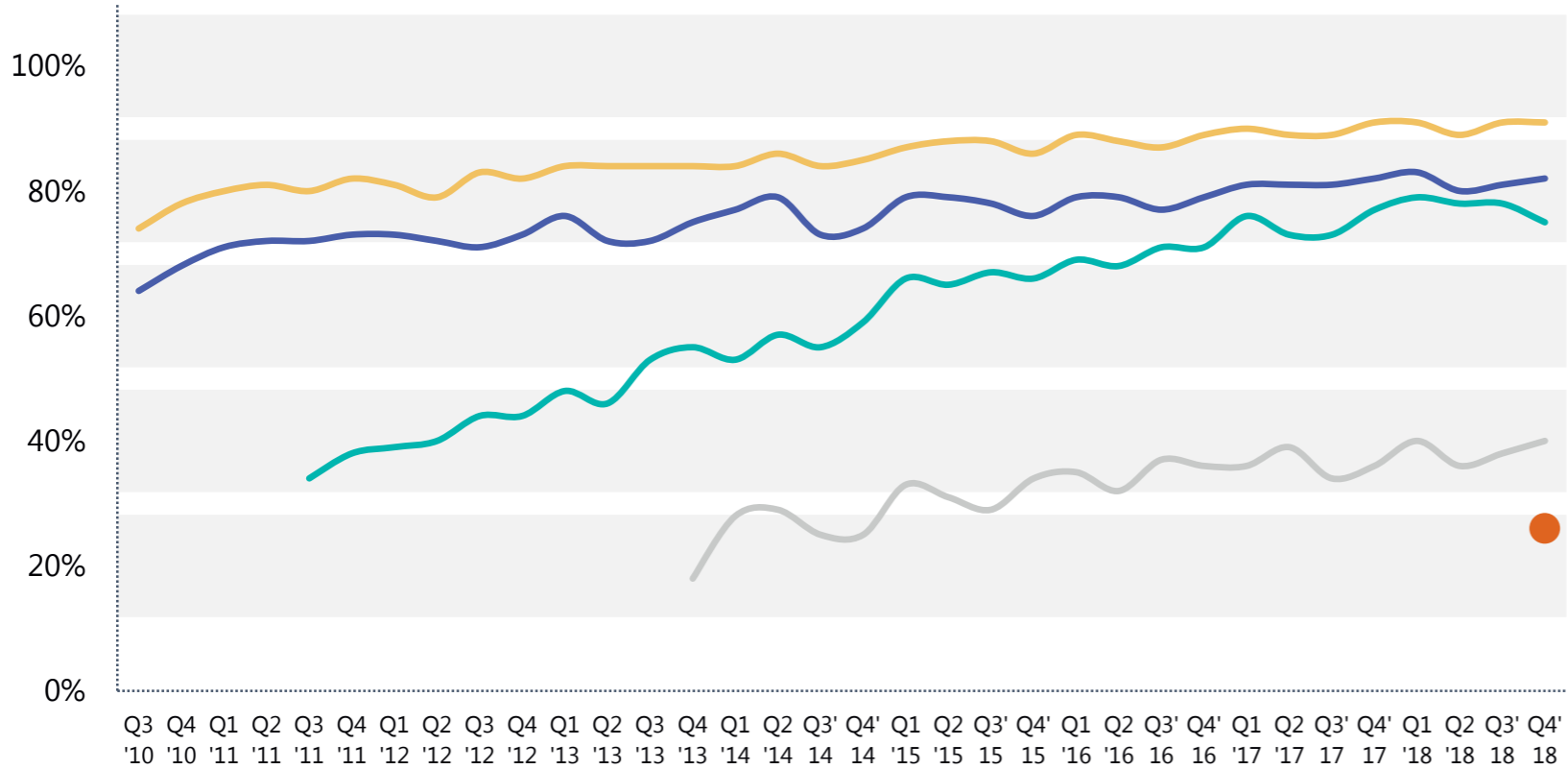


Internet usage

Over 90% of GB adults have access to the internet anywhere, with 8 in 10 being able to access broadband at home



A quarter use a mobile internet device such as a Dongle or Mobile Wi-Fi to connect



- 91%** Internet usage anywhere
- 82%** Broadband at home
- 75%** Connect using Mobile Phone
- 40%** Connect via Tablet
- 26%** *Connect via Mobile Internet Device

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

While internet connectivity among younger demographics is almost ubiquitous, it is lowest among those aged 65+ with a DE social grade



Internet Connectivity by demographic

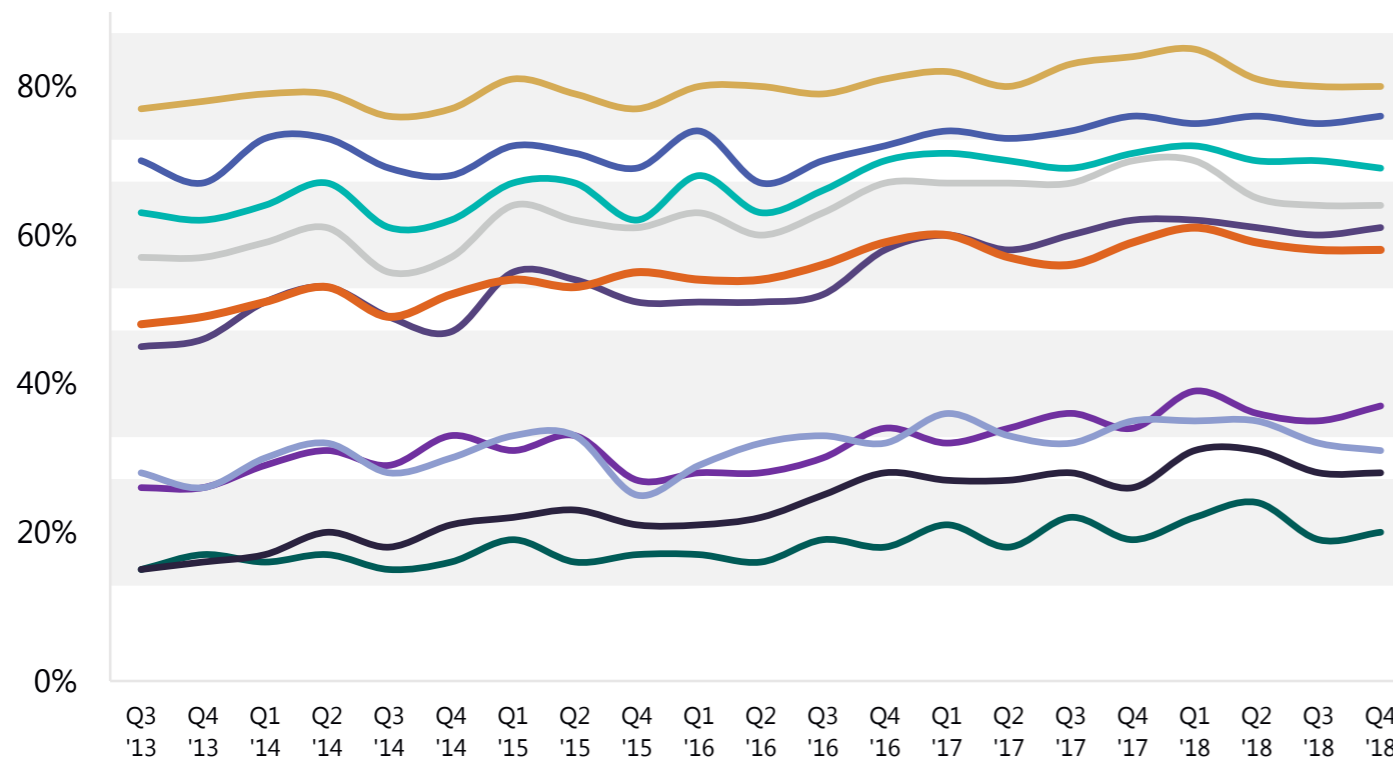
	All	15-24	25-34	35-44	45-54	55-64	65+	
Males	92%	99%	99%	98%	95%	91%	74%	<ul style="list-style-type: none"> ● 0-49% ● 50-74% ● 75-100%
AB	96%	100%	98%	100%	100%	99%	88%	
C1	94%	100%	100%	100%	99%	89%	76%	
C2	91%	100%	100%	99%	95%	90%	63%	
DE	84%	98%	97%	92%	86%	82%	54%	
Females	89%	98%	98%	97%	99%	90%	67%	
AB	97%	100%	98%	100%	100%	98%	89%	
C1	92%	99%	100%	97%	99%	96%	69%	
C2	91%	100%	100%	100%	97%	91%	63%	
DE	78%	95%	92%	88%	98%	73%	50%	

Around two thirds of GB adults use the internet for online shopping, with emails being the most popular online activity



Not asked in Q3 2015

% Use of the internet in the past 3 months



- 80%** Sending/Reading emails
- 76%** Visit sites for info personal interests
- 69%** Visit sites for info on products thinking of buying
- 64%** Visit sites to buy products online
- 61%** Check bank account/other financial holdings
- 58%** Social networking
- 37%** Download/stream music
- 31%** Download/stream TV
- 28%** Download/stream movies
- 20%** Play video games online

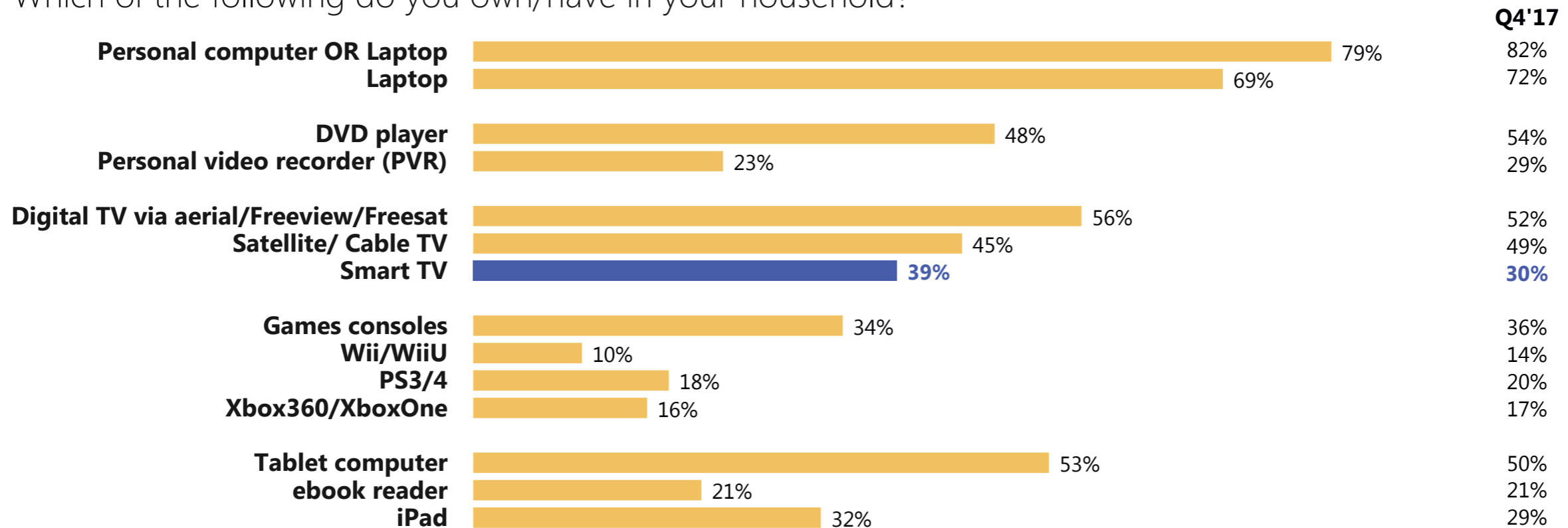


Connected Home

The number of GB adults with a Smart TV in their household is up by 9% pts vs. this time last year, as DVD ownership falls by 6% pts



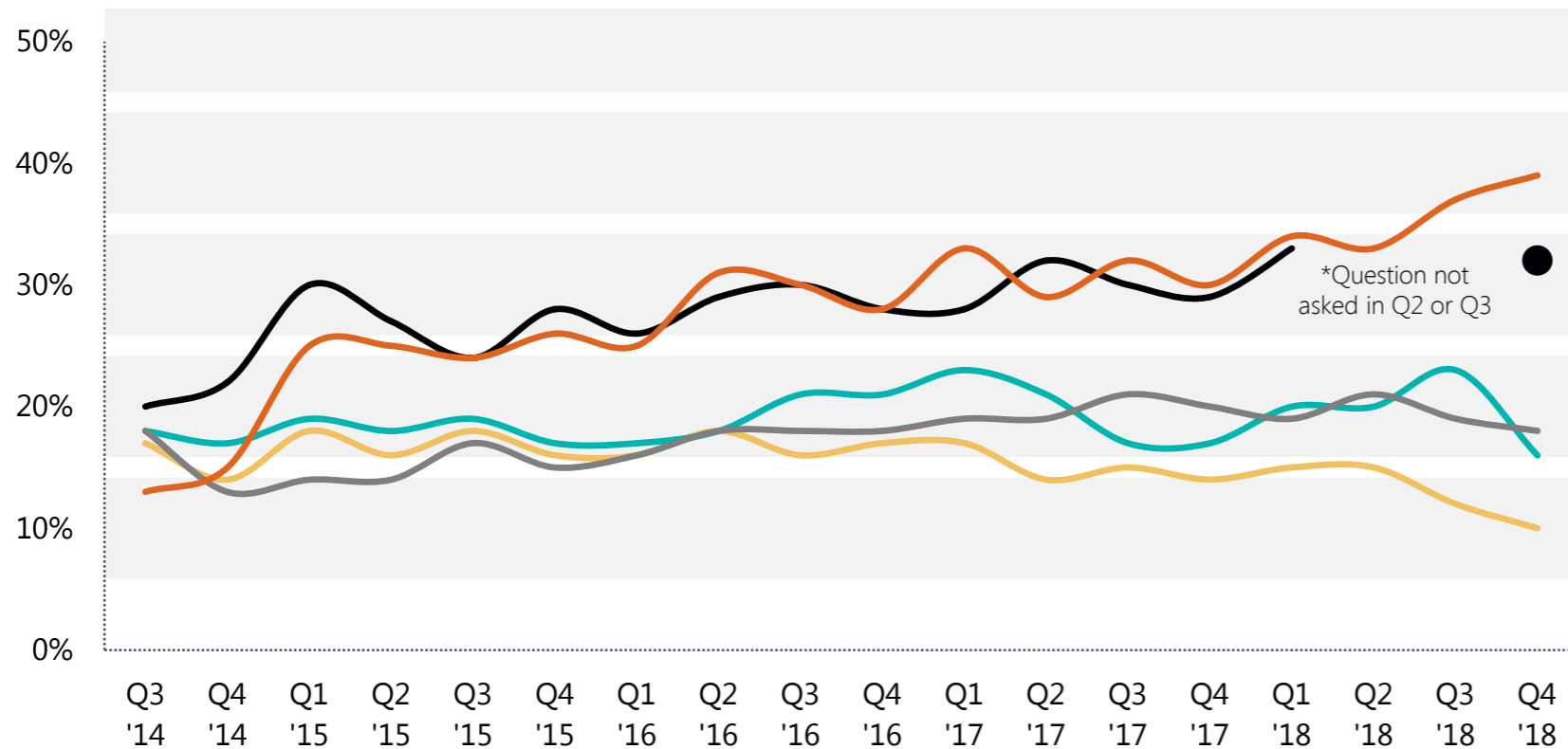
Which of the following do you own/have in your household?





As ownership of Smart TV's continues to rise, the popularity of Xbox consoles has seen a significant decrease vs. Q3

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



- 39%** Smart TV
- 32%** *iPad
- 18%** PlayStation
- 16%** Xbox
- 10%** Wii

* Ownership for iPad was not asked in Q2/3 '18

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

Tech tracker technical details

Ipsos MORI interviewed a quota sample of **1,000 adults aged 15+ in GB**.

The latest interviews were carried out face-to-face **26th October – 7th November 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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