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 1 2019 (fieldwork conducted 1st – 10th February)

Representative sample of c.1000 GB adults ages 15+

Internet Usage  Connected Home  Smartphone Ownership
Tablet Ownership  Social Networking  Voice Activated Speakers
Summary

This quarter’s Tech Tracker shows us the continued rise in popularity for Voice Activated Speakers over the Christmas Period. With penetration now at 14% across GB (significantly higher than this time last year at 8%).

Amazon’s Echo line has emerged as the clear market leader with 79% of Voice Activated Speaker owners having one.

Most Voice Activated Speaker owners continue to focus on the traditional functionality of their speaker, primarily using it to listen to audio content (83%).

Personal data security is the largest concern for owners, with almost 1/3rd (30%) concerned their conversations or data is being recorded and stored.

In the broader tech space we have seen internet connectivity remain steady with ~90% of GB adults connected. Connecting using a mobile phone has become as popular as home broadband and looks set to become the primary connection method in the coming year.

The popularity of Smart TVs has continued to rise with ownership now at 41% up 7 percentage points from Q1 2018, while smartphones remain our most owned device.

In the smartphone market, 83% of GB adults own at least one smartphone with iOS and Android phones each having around 40% market share.
Voice Activated Speakers
Since Q1 2018 ownership of Voice Activated Speakers has almost doubled

Those aged 35-54 are the most likely to own one

Voice Activated Speaker ownership

- Q1 2018: 8%
- Q4 2018: 10%
- Q1 2019: 14%

Voice Activated Speaker ownership by age

- 15-24: 11%
- 25-34: 15%
- 35-44: 21% (▲)
- 45-54: 21% (▲)
- 55-64: 14%
- 65+: 6% (▼)

Males: 16% (▲)
Females: 12%

AB: 20% (▲)
C1: 15%
C2: 13%
DE: 7%

Significantly higher / lower @ 95% confidence level vs Q1 2018

Significantly higher / lower @ 95% confidence level within demographic groups

Base: circa 2,000 GB adults aged 15+ Q1 2019
Source: Ipsos MORI
Amazon’s Echo is the clear market leader

Over the Christmas period Amazon announced the Echo Dot was the top seller across the site

Voice Activated Speaker ownership by brand

- Amazon Echo: 79%
- Google Home: 13%
- Sonos: 4%
- Bose: 3%
- Apple HomePod: 2%
- Other voice activated speaker: 5%

Base: circa 250 GB adults aged 15+ who own Voice Activated Speaker
Source: Ipsos MORI
Almost half of Voice Activated Speaker owners received theirs as a gift

The top 3 reasons for owning one remain the same as Q1 2018

<table>
<thead>
<tr>
<th>Reasons for owning a Voice Activated Speaker</th>
<th>It was a gift</th>
<th>For music streaming</th>
<th>Listening to the radio</th>
<th>To use as an alarm clock</th>
<th>To find out what it does</th>
<th>For managing smart home appliances</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1 2018</td>
<td>48%</td>
<td>28%</td>
<td>26%</td>
<td>13%</td>
<td>17%</td>
<td>12%</td>
<td>48%</td>
</tr>
<tr>
<td>Q1 2019</td>
<td>43%</td>
<td>32%</td>
<td>28%</td>
<td>15%</td>
<td>15%</td>
<td>12%</td>
<td>40%</td>
</tr>
</tbody>
</table>

Base: circa 250 GB adults aged 15+ who own Voice Activated Speaker
Source: Ipsos MORI
Households with children are significantly more likely to own a Voice Activated Speaker

The average owner has 1.5 speakers

Voice Activated Speaker ownership across households

- Households with Children: 21%
- Households without Children: 12%

Number of Voice Activated Speakers owned

- 1 Speaker: 67%
- 2 Speakers: 22%
- 3+ Speakers: 11%

1.5 is the average number of Voice Activated Speaker an owner will have

Base: circa 250 GB adults aged 15+ who own Voice Activated Speaker

Source: Ipsos MORI
Most owners use their Voice Activated Speaker for its “traditional” speaker functions
Less than half use them for “smart” speaker functions

Functions they have used Voice Activated Speakers for

<table>
<thead>
<tr>
<th>Function</th>
<th>“Traditional” Functionality</th>
<th>“Smart” Functionality</th>
</tr>
</thead>
<tbody>
<tr>
<td>Playing a specific song</td>
<td>65%</td>
<td>15%</td>
</tr>
<tr>
<td>Listening to the radio</td>
<td>52%</td>
<td>25%</td>
</tr>
<tr>
<td>Checking the weather</td>
<td>44%</td>
<td>14%</td>
</tr>
<tr>
<td>Setting a timer/Alarm</td>
<td>40%</td>
<td>12%</td>
</tr>
<tr>
<td>Asking for help with something (e.g. asking for a recipe)</td>
<td>34%</td>
<td>12%</td>
</tr>
<tr>
<td>Listening to audiobooks/podcasts</td>
<td>30%</td>
<td>12%</td>
</tr>
<tr>
<td>Checking the latest news</td>
<td>25%</td>
<td>10%</td>
</tr>
<tr>
<td>Checking live sports scores</td>
<td>17%</td>
<td>3%</td>
</tr>
<tr>
<td>Playing a game</td>
<td>17%</td>
<td>10%</td>
</tr>
<tr>
<td>Controlling Smart home appliances</td>
<td>15%</td>
<td>4%</td>
</tr>
<tr>
<td>Controlling a compatible TV (e.g. Amazon Fire TV)</td>
<td>14%</td>
<td>3%</td>
</tr>
<tr>
<td>Creating a to-do list</td>
<td>12%</td>
<td>12%</td>
</tr>
<tr>
<td>Making phone calls</td>
<td>12%</td>
<td>12%</td>
</tr>
<tr>
<td>Receiving a travel update</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>Managing my calendar</td>
<td>10%</td>
<td>4%</td>
</tr>
<tr>
<td>Online shopping</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>Texting</td>
<td>3%</td>
<td>1%</td>
</tr>
<tr>
<td>Ordering cab/taxi</td>
<td>1%</td>
<td>10%</td>
</tr>
<tr>
<td>Other</td>
<td>17%</td>
<td>17%</td>
</tr>
</tbody>
</table>

83% Of owners are using their Voice Activated Speaker for any audio content/service and this is similar across all age groups.

Base: circa 250 GB adults aged 15+ who own Voice Activated Speaker
Source: Ipsos MORI
Owners of Voice Activated Speakers see them as the future for speakers, though security remains a concern for some

Statements about Voice Activated Speakers usage

- **Listening to radio/music is easy**: 2% Don't know, 11% Disagree, 16% Neither Agree nor Disagree, 71% Agree
- **Voice Activated Speakers are the future**: 3% Don't know, 13% Disagree, 26% Neither Agree nor Disagree, 58% Agree
- **Makes my life easier**: 3% Don't know, 24% Disagree, 26% Neither Agree nor Disagree, 47% Agree
- **I listen to more radio**: 3% Don't know, 34% Disagree, 17% Neither Agree nor Disagree, 46% Agree
- **I listen to more music**: 2% Don't know, 32% Disagree, 21% Neither Agree nor Disagree, 45% Agree
- **My Voice Activated Speaker keeps me company**: 8% Don't know, 56% Disagree, 18% Neither Agree nor Disagree, 18% Agree
- **Talking to a machine makes me uncomfortable**: 5% Don't know, 60% Disagree, 20% Neither Agree nor Disagree, 15% Agree
- **Voice Activated Speaker don’t do very much**: 4% Don't know, 53% Disagree, 25% Neither Agree nor Disagree, 18% Agree
- **The voice recognition isn’t very good**: 4% Don't know, 53% Disagree, 20% Neither Agree nor Disagree, 23% Agree
- **I have concerns about my personal data**: 5% Don't know, 43% Disagree, 22% Neither Agree nor Disagree, 30% Agree

Base: circa 250 GB adults aged 15+ who own Voice Activated Speaker
Source: Ipsos MORI
Internet Usage

How, When, Where
Almost 90% connect to the internet anywhere

While connecting using a mobile phone is set to overtake connecting via broadband

% How people connect to the internet

89% Internet usage anywhere
78% Broadband at home
77% *Connect using Mobile Phone
38% Connect via Tablet
26% Connect via Mobile Internet Device

* 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 1,000 GB adults aged 15+ per wave thereafter

Source: Ipsos MORI
Email remains the most popular online activity
While 2/3rds of GB adults now shop online, rising by 10 percentage points since Q3 2014

% Use of the internet in the past 3 months

80% Read or send emails
72% Visit sites for info personal interests
68% Visit sites for info on products thinking of buying
66% Visit sites to buy products online
59% Check bank account/ other financial holdings
57% Social networking
38% Download/ stream music
34% Download/ stream TV
30% Download/ stream movies
19% Play video games online

Base: circa 2,000 interviews per wave until Quarter 1 2010, circa 1,000 GB adults aged 15+ per wave thereafter
Source: Ipsos MORI
Amongst those aged 15-34 internet connectivity is close to 100% across gender & social grade

Connectivity falls among those over 65

### Internet connectivity by demographic

<table>
<thead>
<tr>
<th></th>
<th>All</th>
<th>15-24</th>
<th>25-34</th>
<th>35-44</th>
<th>45-54</th>
<th>55-64</th>
<th>65+</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Males</strong></td>
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<td>All</td>
<td>92%</td>
<td>99%</td>
<td>99%</td>
<td>97%</td>
<td>96%</td>
<td>92%</td>
<td>71%</td>
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<tr>
<td>AB</td>
<td>97%</td>
<td>100%</td>
<td>98%</td>
<td>100%</td>
<td>100%</td>
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<td>90%</td>
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<tr>
<td>C1</td>
<td>95%</td>
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<td>100%</td>
<td>100%</td>
<td>99%</td>
<td>93%</td>
<td>77%</td>
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<tr>
<td>C2</td>
<td>89%</td>
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<td>100%</td>
<td>97%</td>
<td>93%</td>
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<td>DE</td>
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<td>88%</td>
<td>92%</td>
<td>80%</td>
<td>49%</td>
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<tr>
<td><strong>Females</strong></td>
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<td>AB</td>
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<td>83%</td>
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<td>C1</td>
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<td>97%</td>
<td>69%</td>
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<tr>
<td>C2</td>
<td>91%</td>
<td>100%</td>
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<td>100%</td>
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<td>94%</td>
<td>65%</td>
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<tr>
<td>DE</td>
<td>76%</td>
<td>94%</td>
<td>96%</td>
<td>86%</td>
<td>97%</td>
<td>71%</td>
<td>46%</td>
</tr>
</tbody>
</table>

Base: circa 1,000 GB adults aged 15+ per wave
Source: Ipsos MORI
Connected Home
The popularity of Smart TVs continues to rise year-on-year, rising significantly by 7% from Q1 2018

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

- Personal computer OR Laptop: 78% (Q1'18: 80%)
  - Laptop: 68% (Q1'18: 70%)
- DVD player: 51%
- Personal video recorder (PVR): 28%
- Digital TV via aerial/Freeview/Freesat: 52%
- Satellite/ Cable TV: 50%
- Smart TV: 41% (Q1'18: 34%)
- Games consoles: 38%
  - Wii/WiiU: 11% (Q1'18: 15%)
  - PS3/4: 21%
  - Xbox360/XboxOne: 19%
- Tablet computer: 52%
- ebook reader: 21%
- iPad: 32%

Base: circa 1,000 GB adults aged 15+. Quarter 1 2019
Source: Ipsos MORI
Over the Christmas period, the Nintendo Switch doubled in ownership from Q4 2018

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

- 21% PlayStation
- 19% Xbox
- 11% Wii/Wii U
- 6% Nintendo Switch

Base: circa 1,000 GB adults aged 15+ per wave
Source: Ipsos MORI
Almost a quarter of GB adults have a smart meter in their homes, while 1 in 10 of us now own a smart watch.

- **29% (net)** own a Smart Home device.
- **23%** Smart Meter
- **20% (net)** own a Fitness Tracker or Smart Watch.
- **14%** Fitness Tracker
- **10%** Smart Watch

Base: circa 1,000 GB adults aged 15+ per wave
Source: Ipsos MORI
Social Networking
2/3rds of GB adults are accessing social networks

With smartphones remaining their most popular device to access through

% Visiting social networking sites

<table>
<thead>
<tr>
<th></th>
<th>Q4 '13</th>
<th>Q1 '14</th>
<th>Q2 '14</th>
<th>Q3 '14</th>
<th>Q4 '14</th>
<th>Q1 '15</th>
<th>Q2 '15</th>
<th>Q3 '15</th>
<th>Q4 '15</th>
<th>Q1 '16</th>
<th>Q2 '16</th>
<th>Q3 '16</th>
<th>Q4 '16</th>
<th>Q1 '17</th>
<th>Q2 '17</th>
<th>Q3 '17</th>
<th>Q4 '17</th>
<th>Q1 '18</th>
<th>Q2 '18</th>
<th>Q3 '18</th>
<th>Q4 '18</th>
<th>Q1 '19</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any device (inc. computers)</td>
<td>65%</td>
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<td>64%</td>
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<tr>
<td>Smartphone</td>
<td>45%</td>
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<tr>
<td>PC/Laptop</td>
<td>31%</td>
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<td>Tablet</td>
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<tr>
<td>Connected TV*</td>
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</tbody>
</table>

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
Social media users across GB skew younger and are more likely to be ABC1

There are no significant differences between genders

% Use of social media by age

<table>
<thead>
<tr>
<th>Age</th>
<th>Male</th>
<th>Female</th>
<th>AB</th>
<th>C1</th>
<th>C2</th>
<th>DE</th>
</tr>
</thead>
<tbody>
<tr>
<td>15-24</td>
<td>90%</td>
<td>88%</td>
<td>77%</td>
<td>77%</td>
<td>59%</td>
<td>58%</td>
</tr>
<tr>
<td>25-34</td>
<td>79%</td>
<td></td>
<td>76%</td>
<td></td>
<td></td>
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<tr>
<td>35-44</td>
<td>79%</td>
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<tr>
<td>45-54</td>
<td>60%</td>
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</tr>
<tr>
<td>55-64</td>
<td>67%</td>
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<tr>
<td>65+</td>
<td>30%</td>
<td>70%</td>
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</tr>
</tbody>
</table>

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

▲▼ Significantly higher / lower than @ 95% confidence level within demographic group
Facebook remains the leading social network amongst GB Adults

The other social networks are all used by around ¼ of adults

% Visited in last 3 months

- Facebook: 59%
- Instagram: 29%
- Twitter: 21%
- Snapchat: 19%
- LinkedIn: 18%

Question not asked between Q3-4 2018

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

Source: Ipsos MORI
Snapchat has the largest difference in use by age

3 in 5 15-24 year olds used it in the past 3 months, compared to 1 in 5 of all GB adults

% Use of social media in the past 3 months

Base: circa 1,000 GB adults aged 15+ per wave
Source: Ipsos MORI
Smartphone Ownership
Smartphones remain our most popular devices, with iPhone and Android evenly splitting the GB population.

% Own by manufacturer

- 83% Any Smartphone
- 42% iPhone
- 40% Android
- 1% Windows Phone
- 1% Blackberry

Question not asked in Q4 2018

Base: circa 1,000 GB adults aged 15+ per wave
Source: Ipsos MORI
Younger smartphone owners are more likely to bank online & watch video clips on their smartphone

% Use of smartphone in the past 3 months

<table>
<thead>
<tr>
<th>Activity</th>
<th>15-34</th>
<th>35+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Read or send emails</td>
<td>69%</td>
<td>71%</td>
</tr>
<tr>
<td>Visit social networking sites</td>
<td>55%</td>
<td>64%</td>
</tr>
<tr>
<td>Online banking</td>
<td>52%</td>
<td>64%</td>
</tr>
<tr>
<td>Browse websites for personal interests</td>
<td>50%</td>
<td>51%</td>
</tr>
<tr>
<td>Download apps for free</td>
<td>46%</td>
<td>53%</td>
</tr>
<tr>
<td>Use instant messaging services</td>
<td>46%</td>
<td>53%</td>
</tr>
<tr>
<td>Watch video clips on sites such as Youtube</td>
<td>45%</td>
<td>58%</td>
</tr>
<tr>
<td>Online shopping</td>
<td>44%</td>
<td>50%</td>
</tr>
<tr>
<td>Download/ stream music over the internet</td>
<td>30%</td>
<td>40%</td>
</tr>
<tr>
<td>Watch catch-up TV</td>
<td>17%</td>
<td>21%</td>
</tr>
</tbody>
</table>

Base: circa 500-750 smartphone owners per wave
Source: Ipsos MORI

▲▼ Significantly higher / lower @ 95% confidence level vs All GB adults
Almost 100% of 15-24 year olds own a smartphone, while adults aged 65+ are the least likely to own a smartphone.

% Own a smartphone by gender, age and social grade

- Gender:
  - Males: 84%
  - Females: 82%

- Age:
  - 15-24: 99%
  - 25-34: 96%
  - 35-44: 95%
  - 45-54: 96%
  - 55-64: 76%
  - 65+: 49%

- Social grade:
  - AB: 92%
  - C1: 90%
  - C2: 80%
  - DE: 67%

Significantly higher / lower @ 95% confidence level within demographic groups.

Base: circa 1,000 GB adults aged 15+ per wave
Source: Ipsos MORI
Tablet Ownership
Half of all GB households continue to own a tablet
Apple’s iPads are marginally preferred to Android models

% Own a tablet in the household

- Any Tablet: 52%
- iPad: 32%
- Android: 26%

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

Question not asked between Q3–4 2018
Email remains the most popular activity on tablets

Over a third of owners will use their tablet for watching video

% Use of tablet in the past 3 months

- 53% Read or send emails
- 42% Browse websites for personal interests
- 38% Online shopping
- 38% Watch video clips on sites such as YouTube
- 37% Visit social networking sites
- 34% Online banking
- 31% Download apps for free
- 27% Watch catch-up TV
- 19% Download/stream music over the internet
- 11% Use the internet to make video calls (VOIP)

Base: circa 300-500 adults 15+ who own tablets
Source: Ipsos MORI
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 1st – 10th February 2019.

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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