Ipsos MORI

TECHNOLOGY TRACKER

CELEBRATING 20 YEARS

Q1 2019

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.

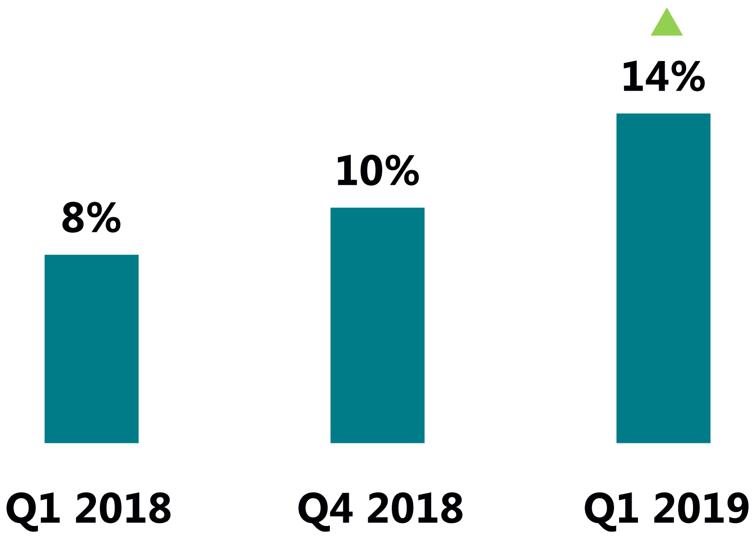
In the smartphone market, 83% of GB adults own at least one smartphone with iOS and Android phones each having around 40% market share.

Voice Activated Speakers

Since Q1 2018 ownership of Voice Activated Speakers has almost doubled

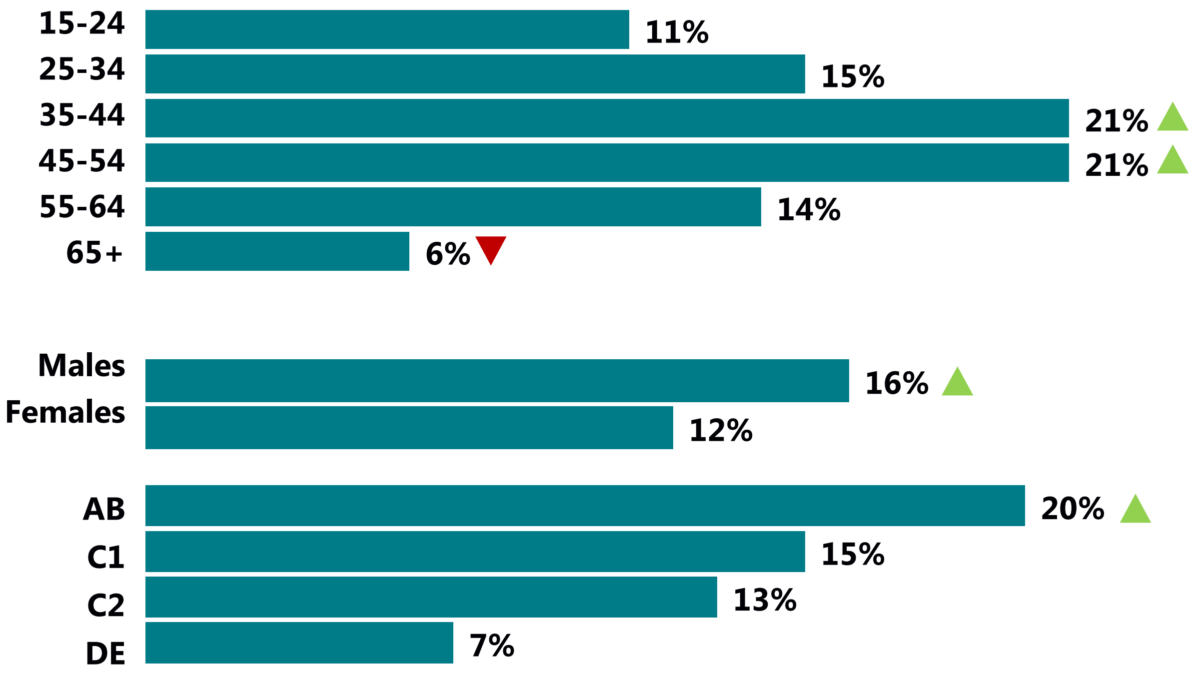
Those aged 35-54 are the most likely to own one

Voice Activated Speaker ownership



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

Voice Activated Speaker ownership by age



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

Ipsos MORI

Significantly higher / lower @ 95% confidence level

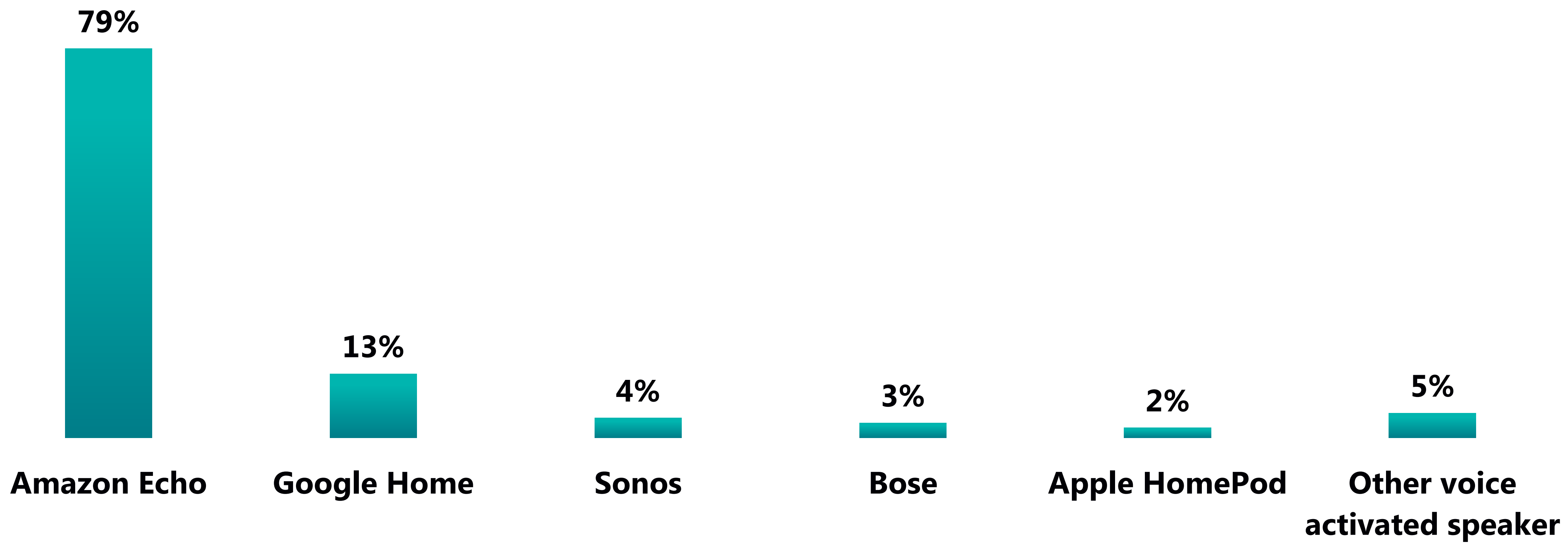
Base: circa 2,000 GB adults aged 15+ Q1 2019

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



Ipsos MORI

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

Reasons for owning a Voice Activated Speaker

	It was a gift	For music streaming	Listening to the radio	To use as an alarm clock	To find out what it does	For managing smart home appliances	Other
Q1 2018	48%	28%	26%	13%	17%	12%	48%
Q1 2019	43%	32%	28%	15%	15%	12%	40%

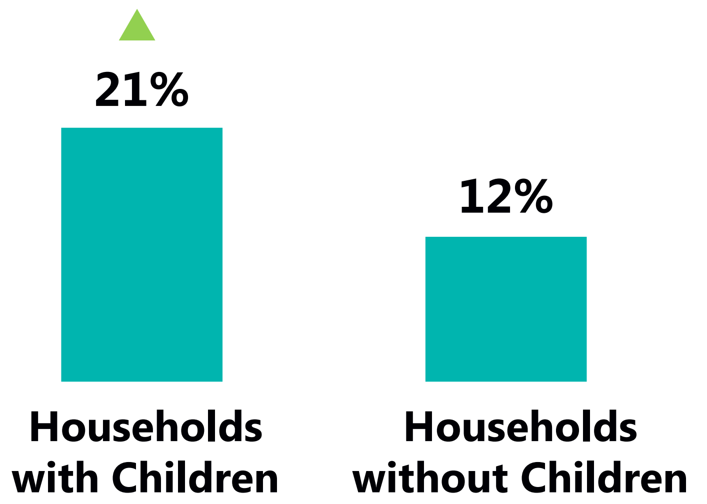
Base: circa 250 GB adults aged 15+ who own Voice Activated Speaker

Source: Ipsos MORI

Households with children are significantly more likely to own a Voice Activated Speaker

The average owner has 1.5 speakers

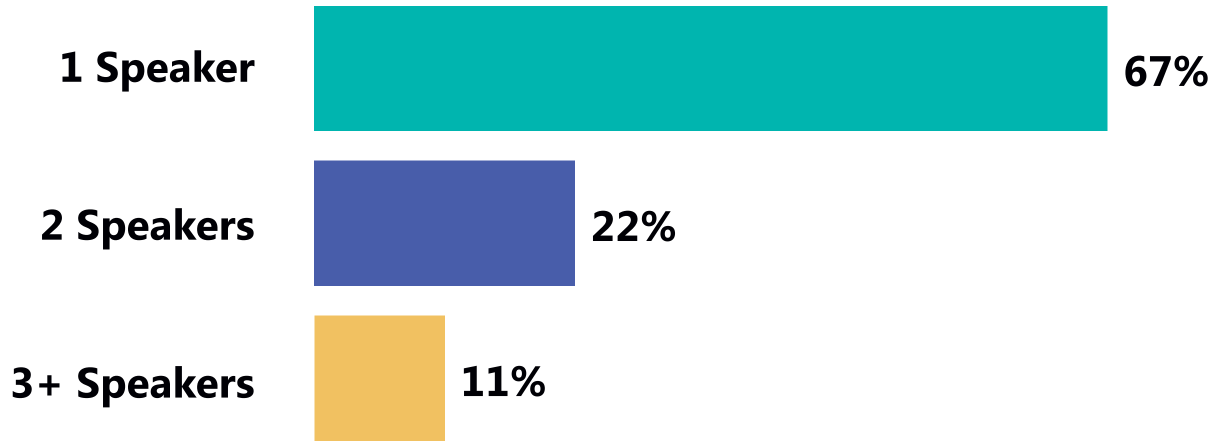
Voice Activated Speaker ownership across households



Base: circa 600 GB Adults With Children, circa 1,400 GB Adults Without Children

Number of Voice Activated Speakers owned

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



Ipsos MORI

▲▼ Significantly higher / lower @ 95% confidence level

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

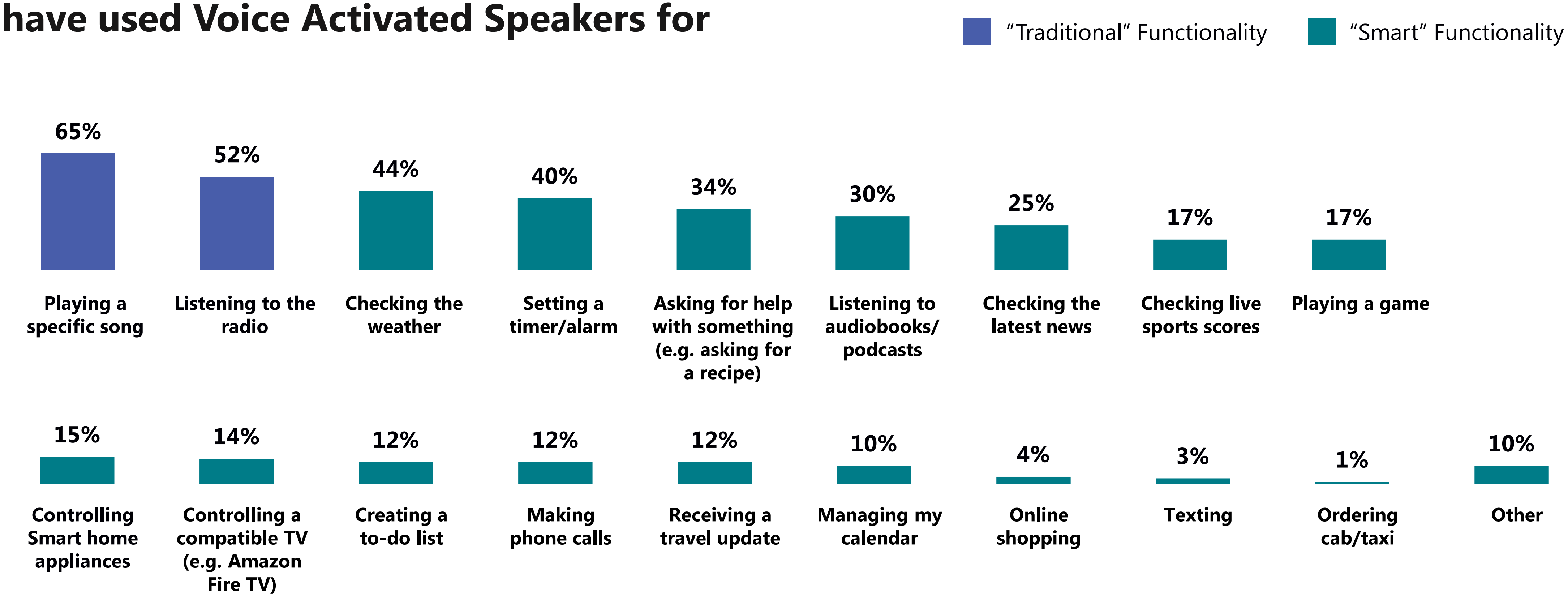
Source: Ipsos MORI

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

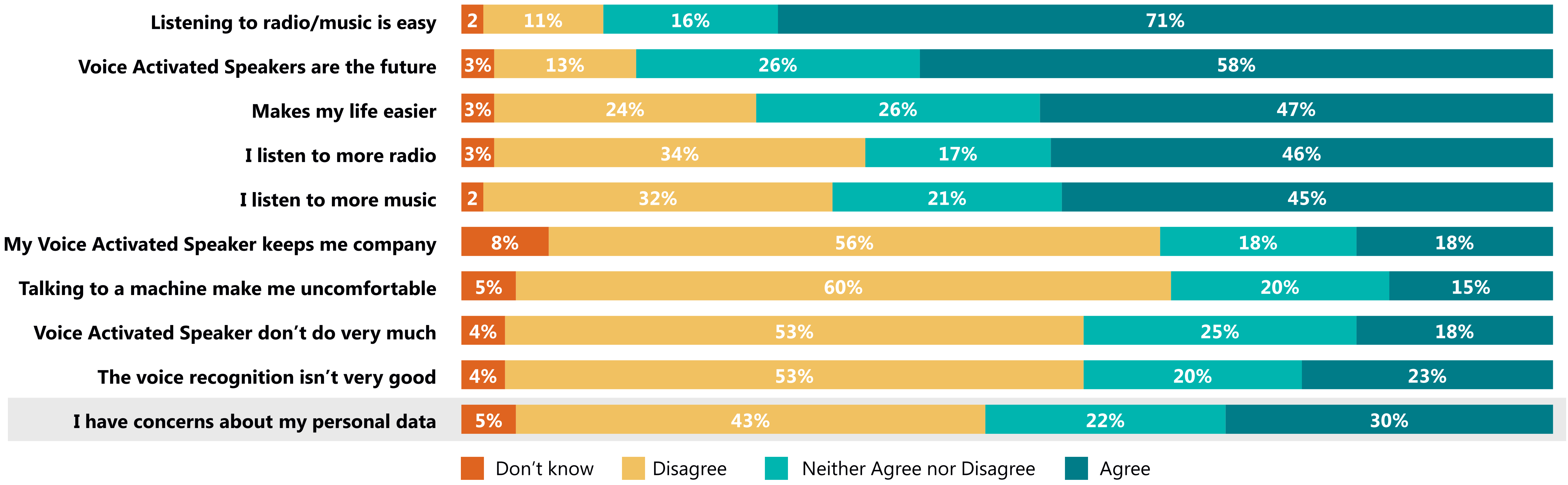
83%
Of owners are using their Voice Activated Speaker for any audio content/ service and this is similar across all age groups



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



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

Source: Ipsos MORI

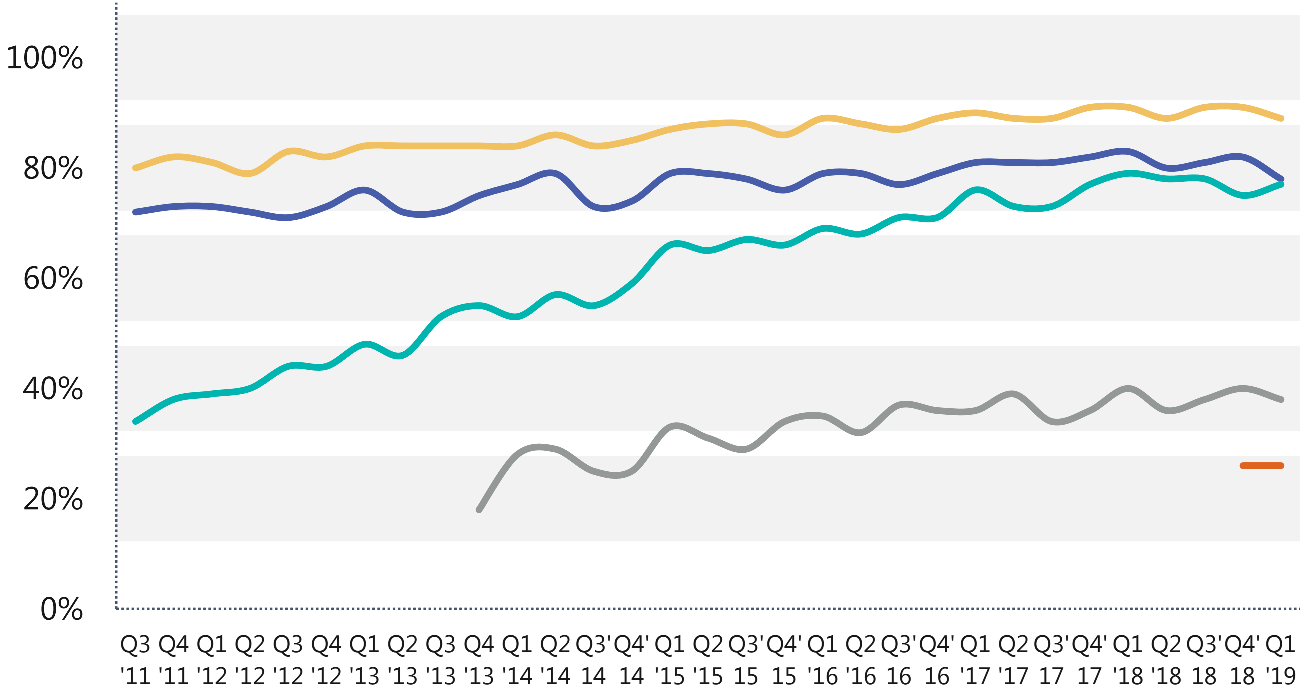
Internet Usage

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

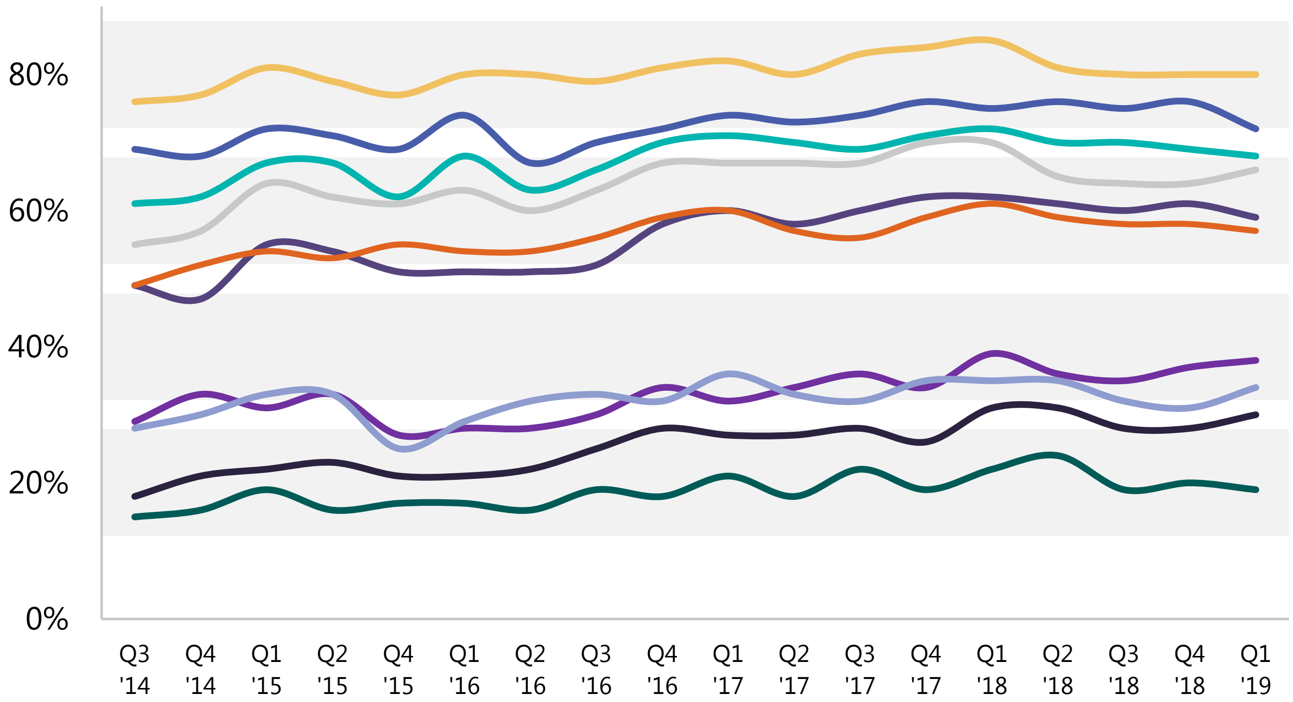
Base: circa 2,000 interviews per wave until Quarter 1 2010, circa 1,000 GB adults aged 15+ per wave thereafter

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

Question not asked between Q2 - 4 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

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

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	92%	99%	99%	97%	96%	92%	71%
AB	97%	100%	98%	100%	100%	100%	90%
C1	95%	100%	100%	100%	99%	93%	77%
C2	89%	100%	100%	97%	93%	89%	53%
DE	84%	98%	98%	88%	92%	80%	49%
Females	89%	98%	98%	96%	98%	91%	64%
AB	95%	100%	99%	100%	98%	98%	83%
C1	92%	99%	100%	97%	98%	97%	69%
C2	91%	100%	99%	100%	98%	94%	65%
DE	76%	94%	96%	86%	97%	71%	46%

0-49%

50-74%

75-100%

Ipsos MORI

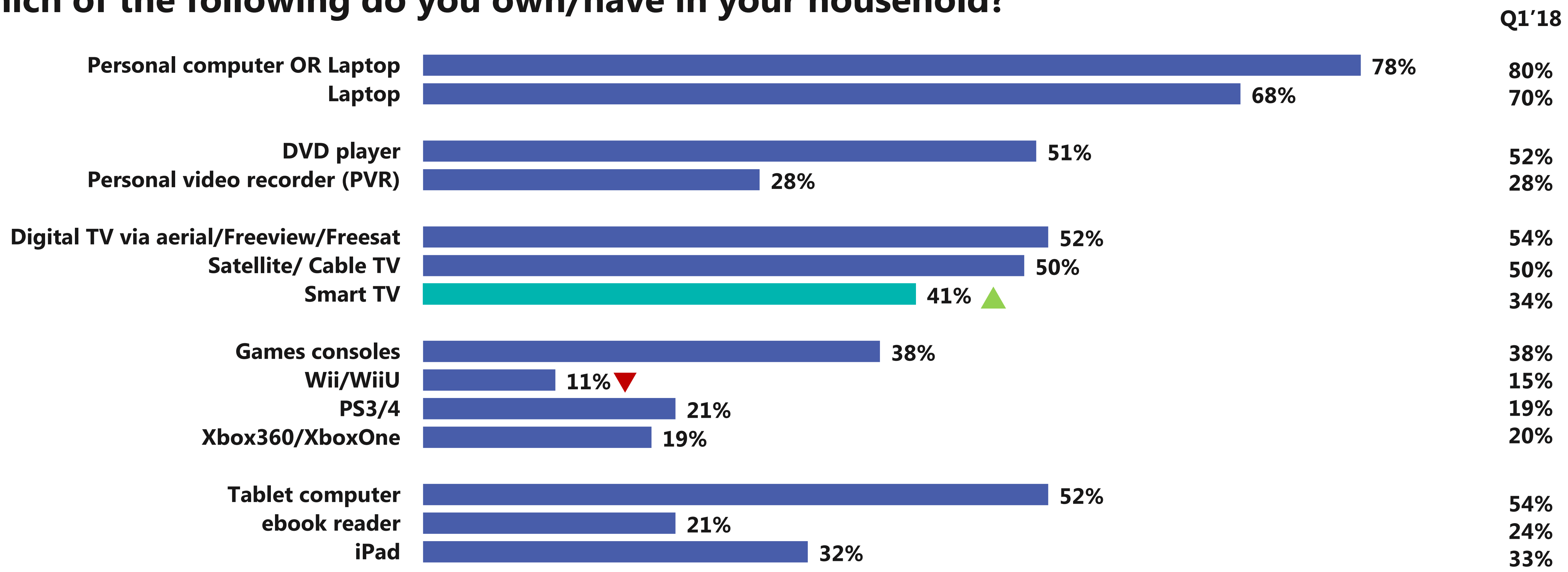
Base: circa 1,000 GB adults aged 15+ per wave

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?



Ipsos MORI

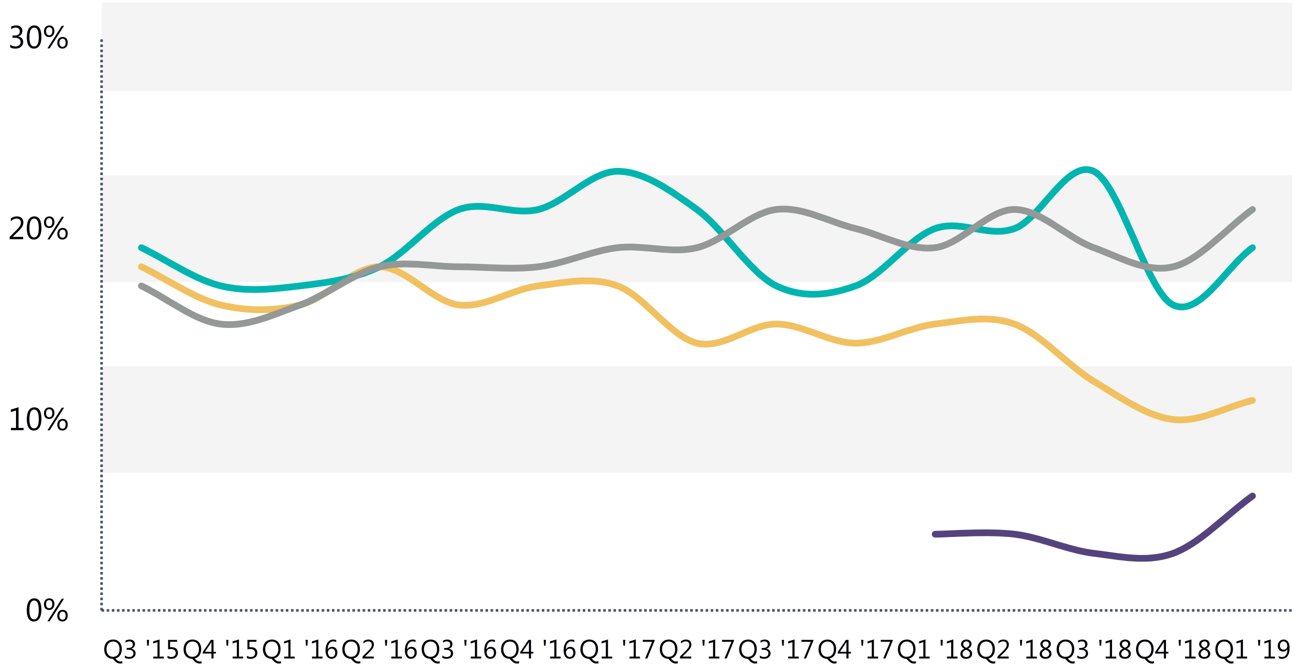
▲▼ Significantly higher / lower @ 95% confidence level

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

Ipsos MORI

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

10% Smart home appliance (excl. Smart TV & Meters)

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

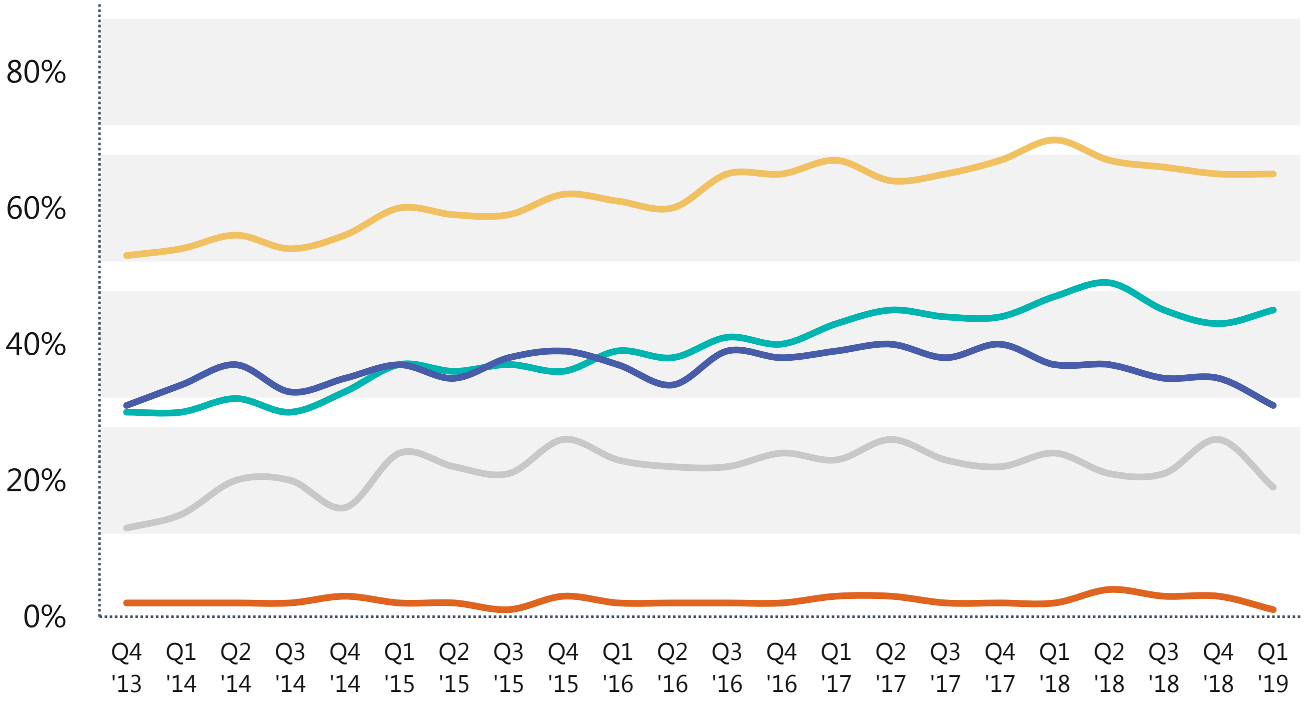
Source: Ipsos MORI

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



65% Any device (inc. computers)
45% Smartphone
31% PC/Laptop
19% Tablet
1% Connected TV*

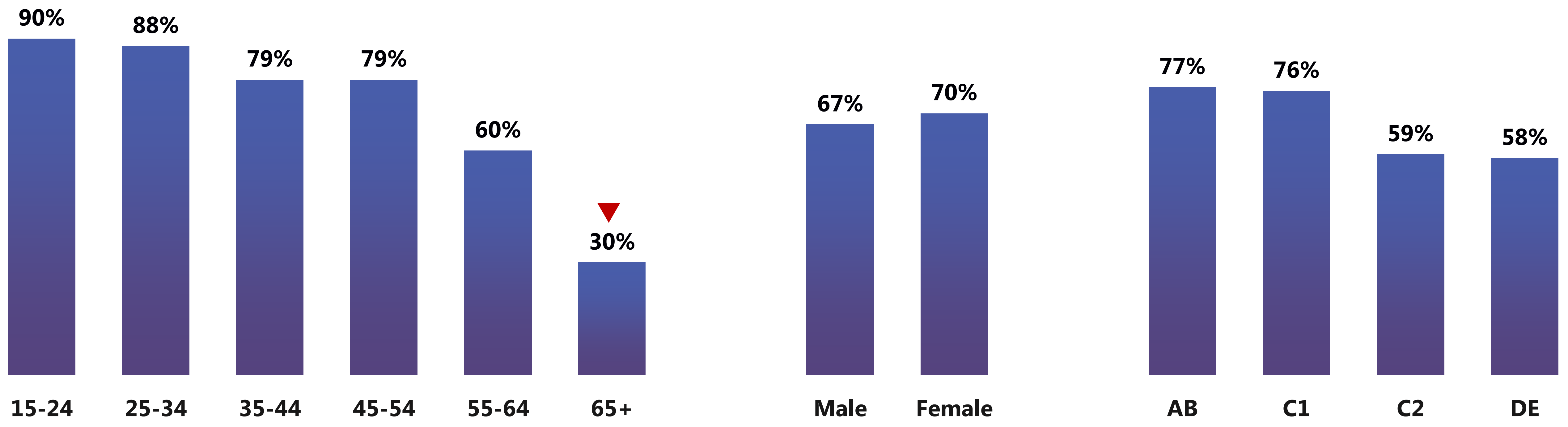
Connected TV* - Games console, web enabled TVs and PCs connected to a TV

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



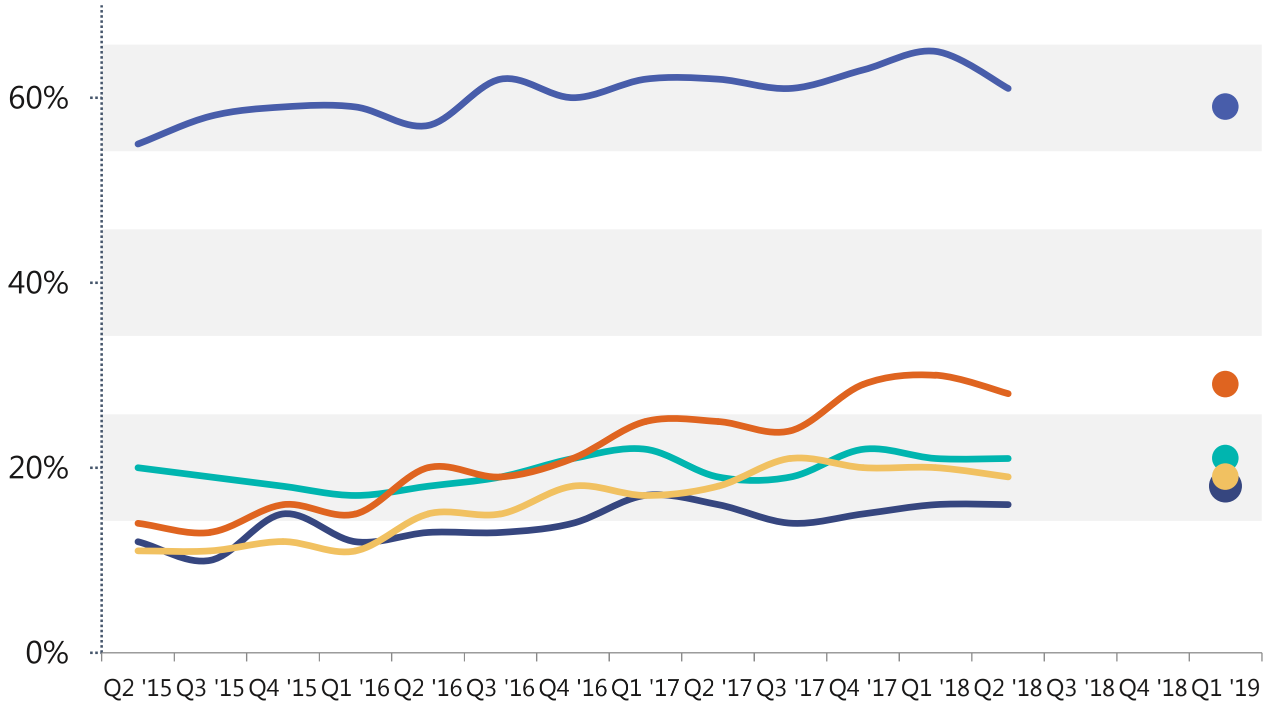
Base: circa 1,000 GB adults aged 15+ per wave
Source: Ipsos MORI

▲▼ 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



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

Question not asked between Q3-4 2018

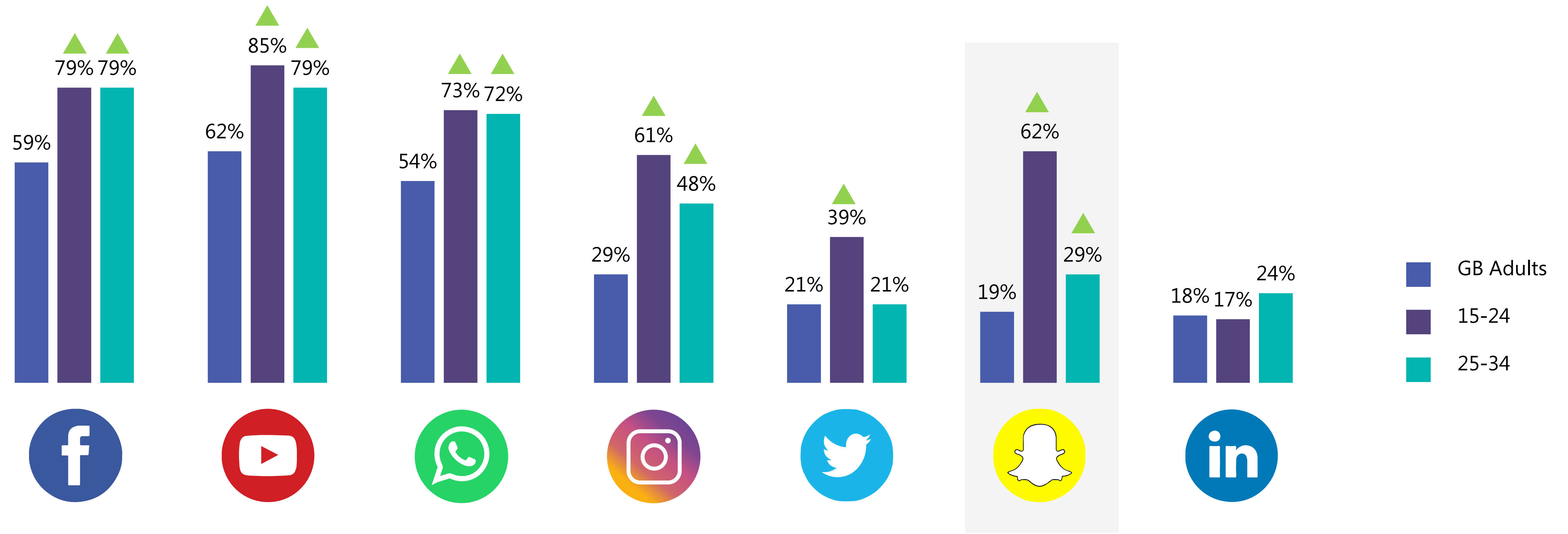
Base: circa 1,000 GB adults aged 15+ per wave

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



Ipsos MORI

▲▼ Significantly higher / lower @ 95% confidence level vs all GB adults

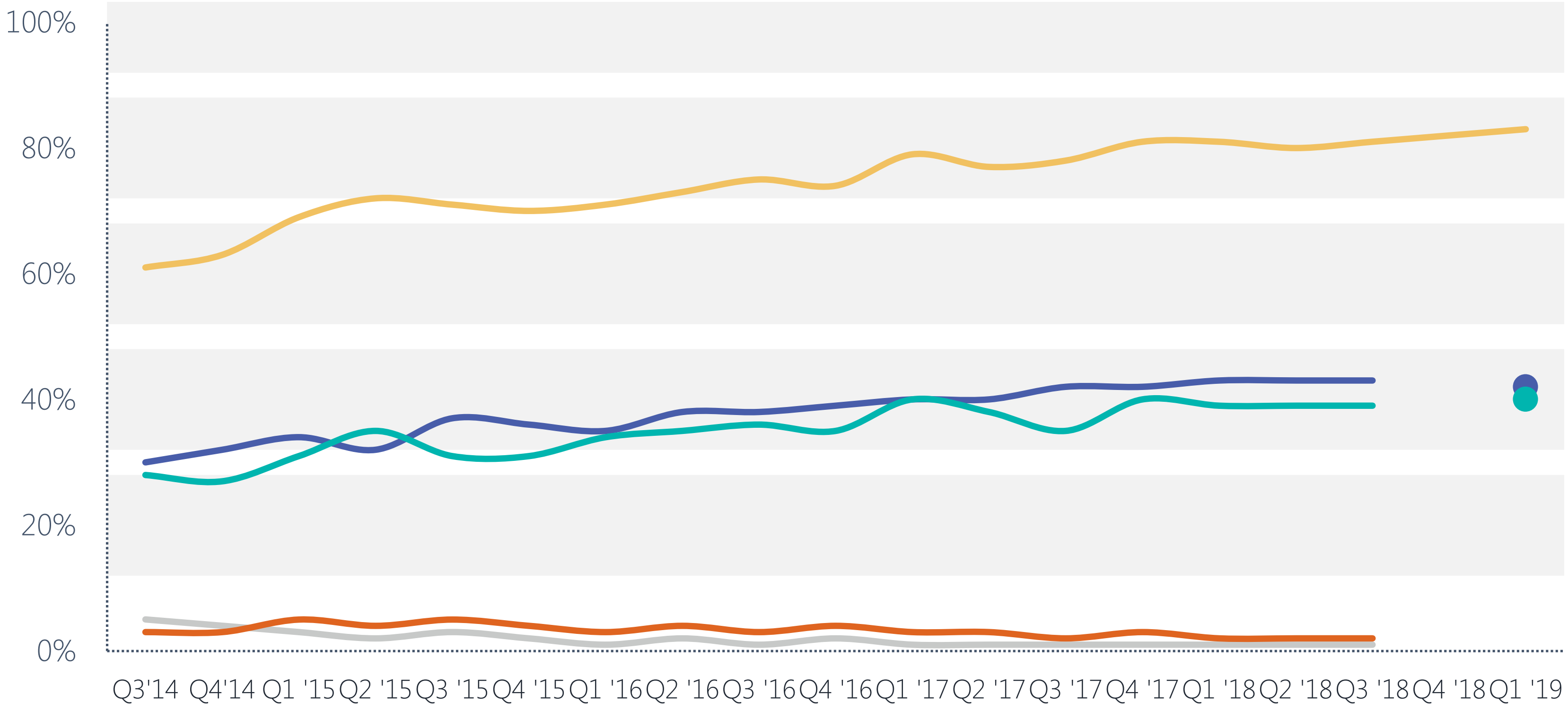
Base: circa 1,000 GB adults aged 15+ per wave

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

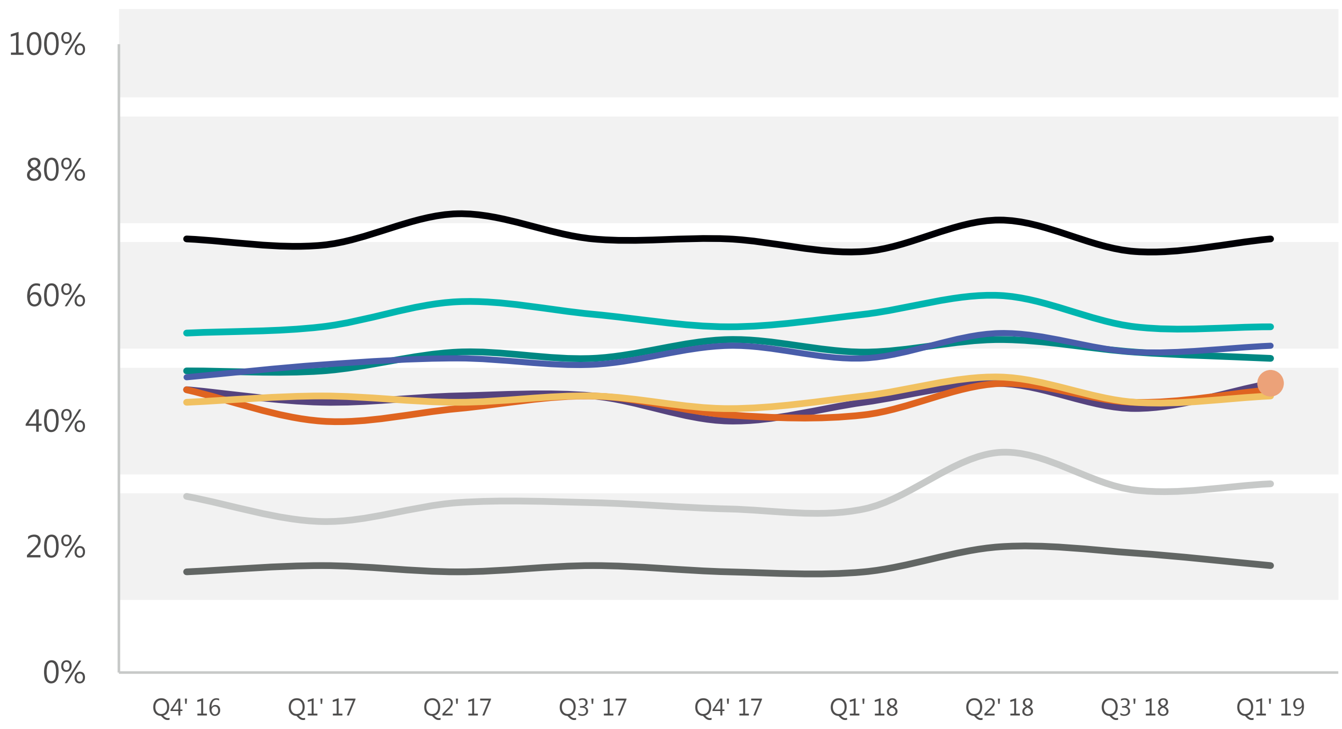
Ipsos MORI

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



All GB Adults		15-34	35+
69%	Read or send emails	71%	67%
55%	Visit social networking sites	▲ 64%	49%
52%	Online banking	▲ 64%	44%
50%	Browse websites for personal interests	51%	49%
46%	Download apps for free	▲ 53%	42%
46%	Use instant messaging services	▲ 53%	42%
45%	Watch video clips on sites such as Youtube	▲ 58%	38%
44%	Online shopping	50%	41%
30%	Download/ stream music over the internet	▲ 40%	24%
17%	Watch catch-up TV	21%	15%

▲▼ Significantly higher / lower @ 95% confidence level vs All GB adults

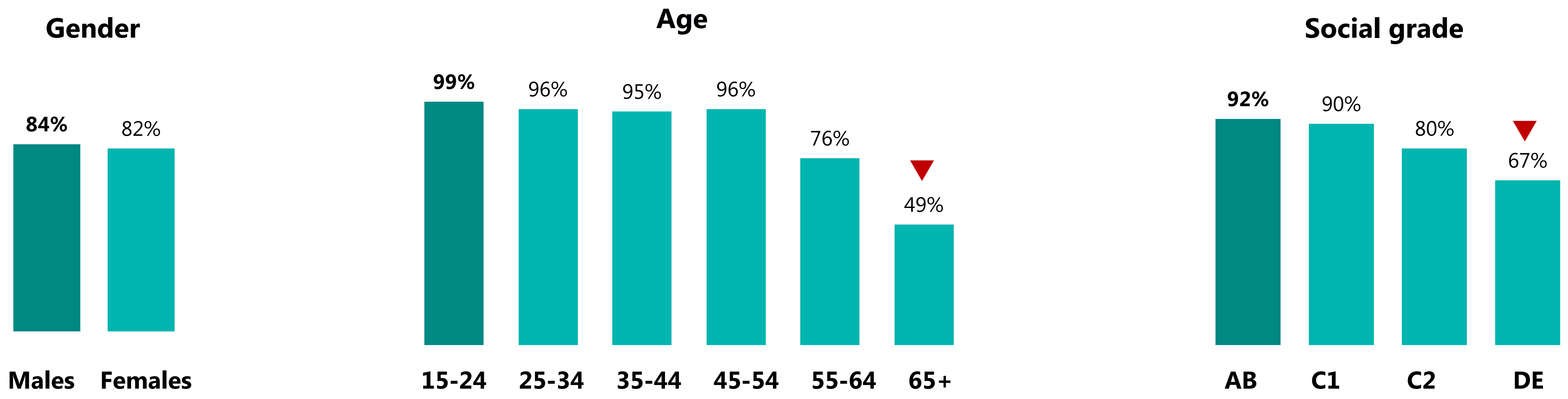
Base: circa 500-750 smartphone owners per wave

Source: Ipsos MORI

Ipsos MORI

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



Ipsos MORI

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

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

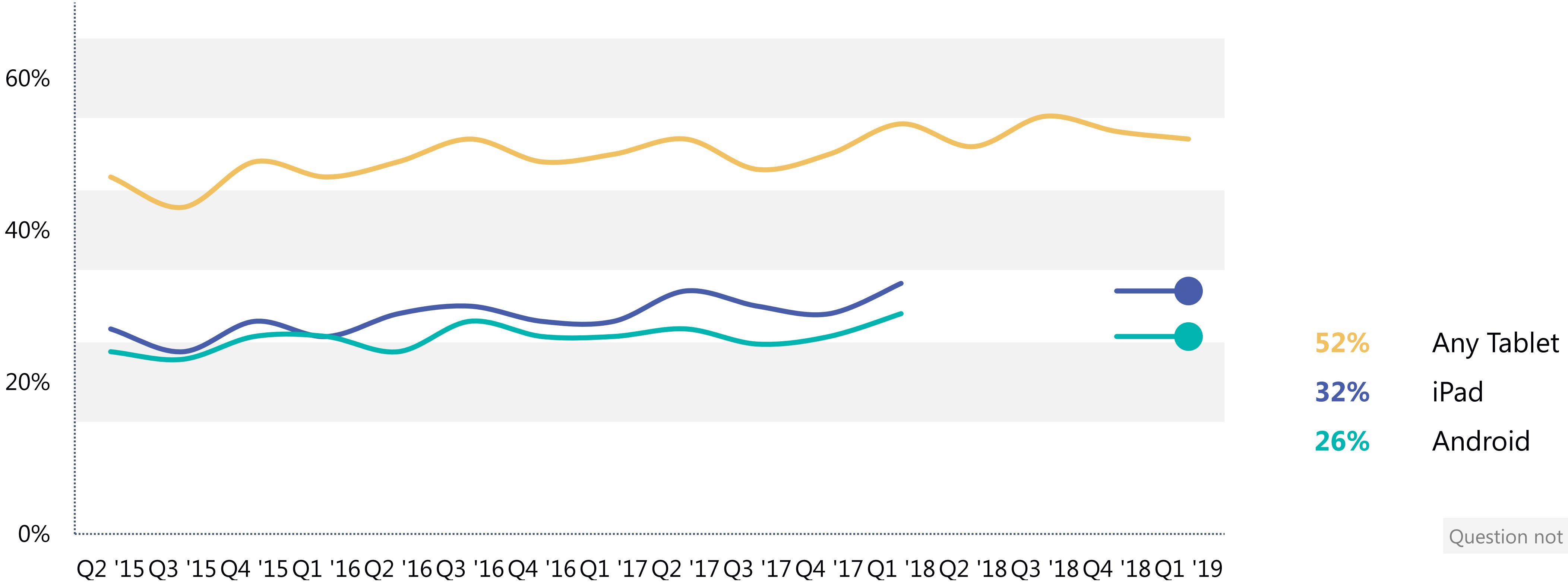
Source: Ipsos MORI

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



Question not asked between Q3-4 2018

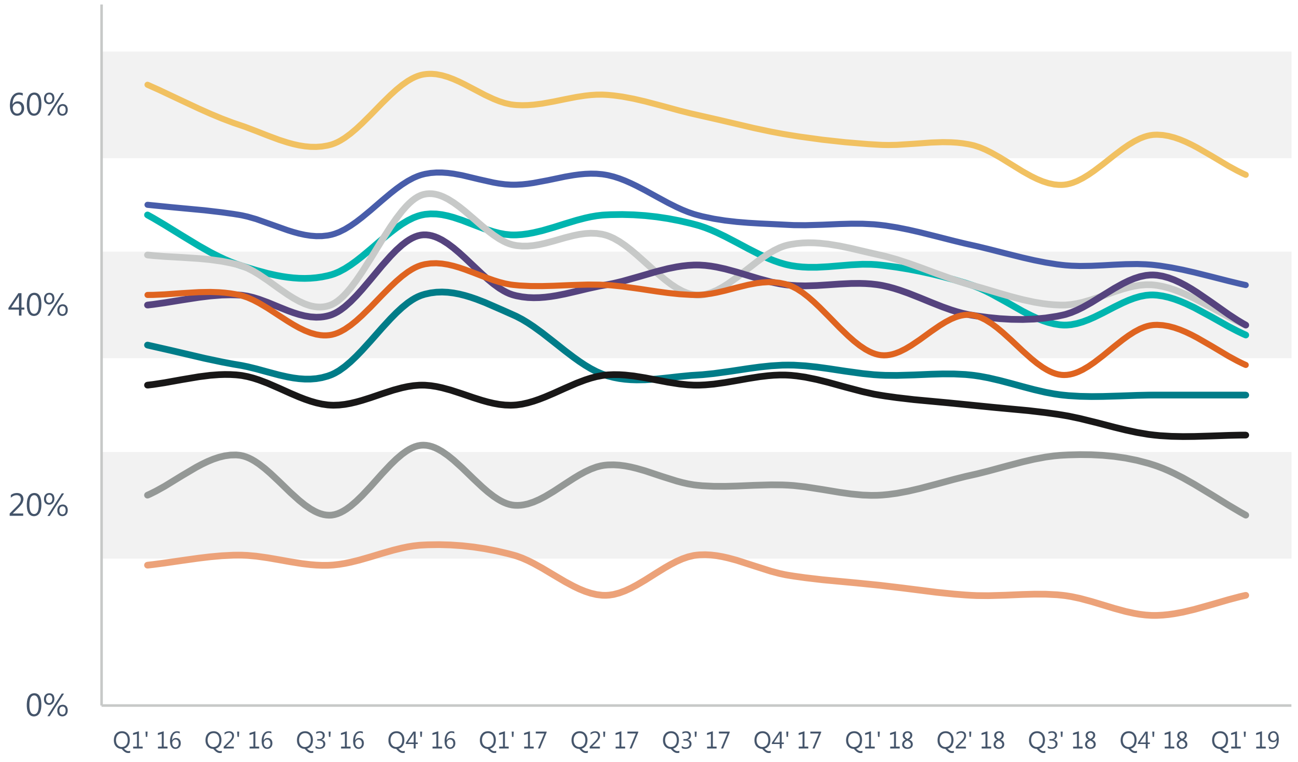
Base: circa 1,000 GB adults aged 15+ per wave

Source: Ipsos MORI

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)

Question not asked between Q3-4 2018

Ipsos MORI

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

Source: Ipsos MORI

Please contact us if you would like further data

Ipsos MORI

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.

For more information

Hannah Whyte-Smith
Hannah.Whyte-Smith@ipsos.com
020 8080 6135

Samara Cunha
Samara.Cunha@ipsos.com
020 3059 8061

Eda Koray
Eda.Koray@ipsos.com
020 8861 8775

Pierce Keating
Pierce.Keating@ipsos.com
020 3059 4718