Technology Tracker

TECH TRACKER

QUARTERLY RELEASE:

Q3 2016

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 3 2016 (field in July)

Representative sample of
c.1000 GB adults
aged 15+

AREAS COVERED

- Internet usage
- Connected home
- Social networking
- Smartphone ownership
- Tablet ownership
- Content consumption Music / games / TV / movies

HEADLINES

Internet usage

Almost 90% of GB adults claim to access the internet but usage amongst 65+ years old is still lower. The proportion of adults using mobile phones to access the internet is at 71% and closing the gap with using broadband at home (77%).

The top 3 online activities remain: accessing email (79%), browsing for information on personal interest (70%) and researching products and services (66%).

Connected home

Ownership of Smart TVs is at 30% and more than half of GB households own a tablet. Both these devices witness a y-o-y increase.

Nearly 2 in 5 of GB adults have at least one gaming console in their household. Xbox is in a leading position with it's ownership being 21%, PS3/4 is at 18% and Wii/WiiU is at 16%.

Social networking

There is an increase in using social networking sites. The number of GB adults accessing social networking platforms via smartphones is on a par with PC/laptops (41% vs. 39%).

Facebook remains the most visited social networking site (62%). Twitter and Instagram are head to head (19%). Twitter users are more likely to be male, whereas Instagram users are more often female.

Smartphones

Three quarters of GB adults now own a smartphone but ownership is still lower amongst 65+. iOS (38%) and Android (36%) penetration remains neck and neck.

Top 3 activities on smartphones are: reading or sending emails (66%), visiting social networking sites (54%) and browsing websites (48%).

Tablets

More than half of GB households now claim to have a tablet (52%). The gap between ownership of iPads and non-iPad tablets is closing (30% vs. 28%).

Top activities on tablets are: reading or sending emails (56%), browsing websites (47%), visiting social networking sites (43%) and online shopping (40%).

Content consumption

Digital music consumption is well ahead of physical (32% vs. 19%). Whereas in movie consumption, physical and digital are head to head (21% vs. 19%).

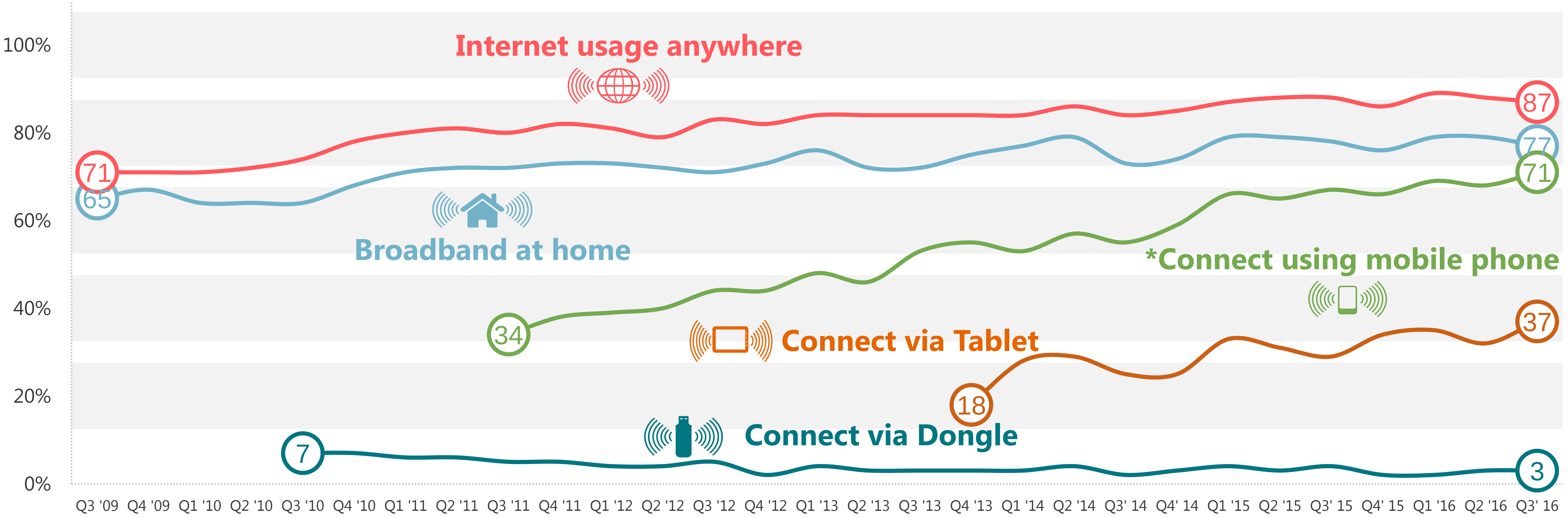
INTERNET USAGE

HOW, WHEN, WHERE

Ipsos Connect

Using internet via mobile is catching up with broadband at home

% 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

Ipsos Connect

65+ adults do not use the internet as much as other age groups

% ACCESSING THE INTERNET BY GENDER AND SOCIAL GRADE

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	89%	99%	99%	95%	91%	85%	69%
Males AB	96%	100%	100%	99%	96%	98%	89%
Males C1	95%	100%	100%	99%	96%	95%	79%
Males C2	87%	99%	98%	94%	93%	77%	55%
Males DE	76%	99%	96%	87%	74%	65%	38%
Females	86%	98%	98%	96%	95%	86%	56%
Females AB	94%	100%	100%	100%	98%	94%	79%
Females C1	91%	100%	100%	98%	99%	93%	66%
Females C2	86%	100%	96%	97%	95%	83%	55%
Females DE	71%	95%	95%	88%	82%	71%	29%

0-49% 50-79% 80-100%

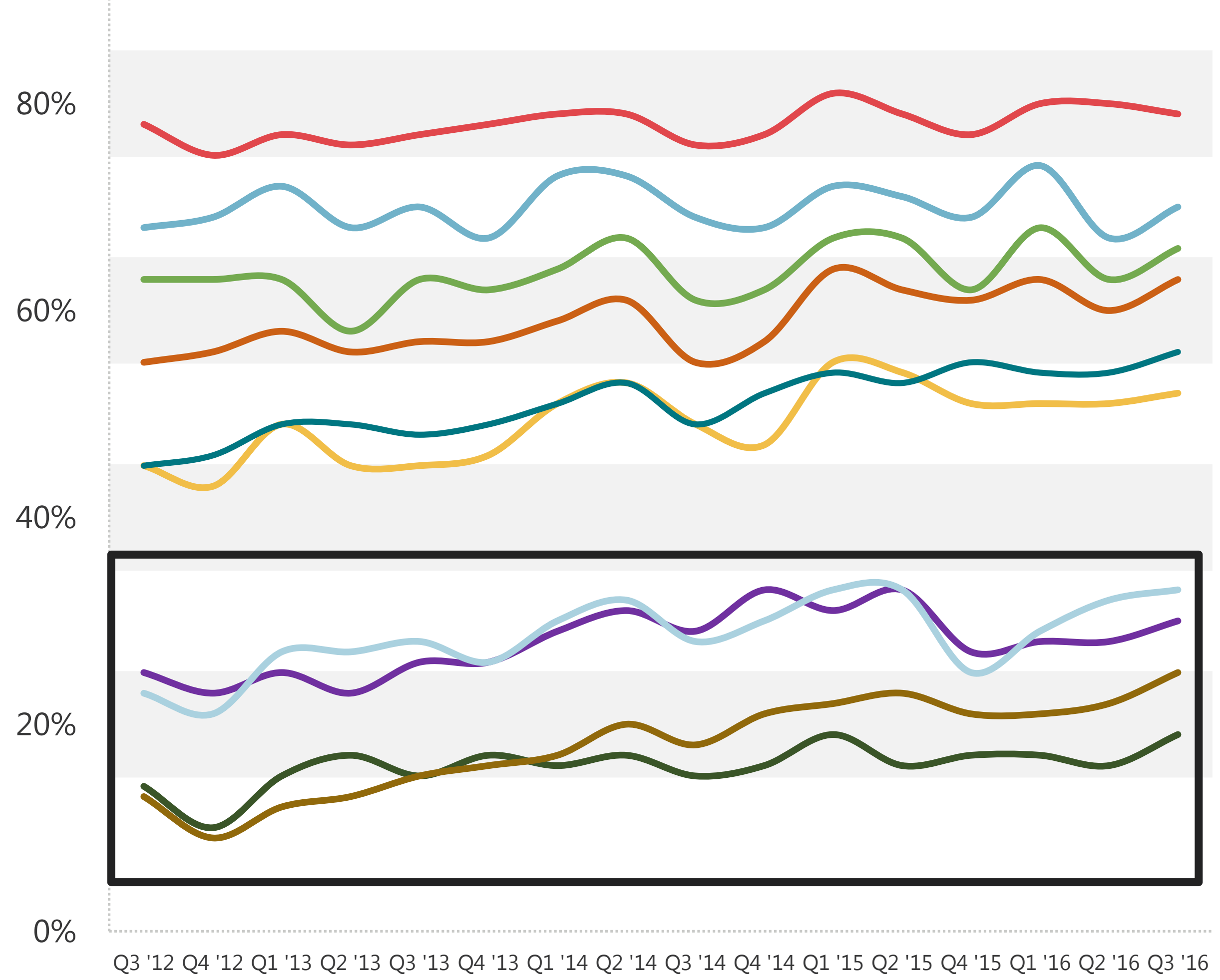
Base: circa 4,000 GB adults aged 15+: Q4 2015/ Q1/ Q2/ Q3 2016

Source: Ipsos MORI

Ipsos Connect

Downloading and streaming content increasing overtime

% USE OF THE INTERNET IN THE PAST 3 MONTHS



79%	Emails
70%	Visit sites for info on personal interests
66%	Visit sites for info on products thinking of buying
63%	Visit sites to buy products online
56%	Social networking
52%	Check bank account/ other financial holdings
33%	Download/ stream TV
30%	Download/ stream music
25%	Download/ stream movies
19%	Play video games online

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

Ipsos Connect

CONNECTED HOME

Ipsos Connect

More than half of the GB households own a tablet (y-o-y increase)

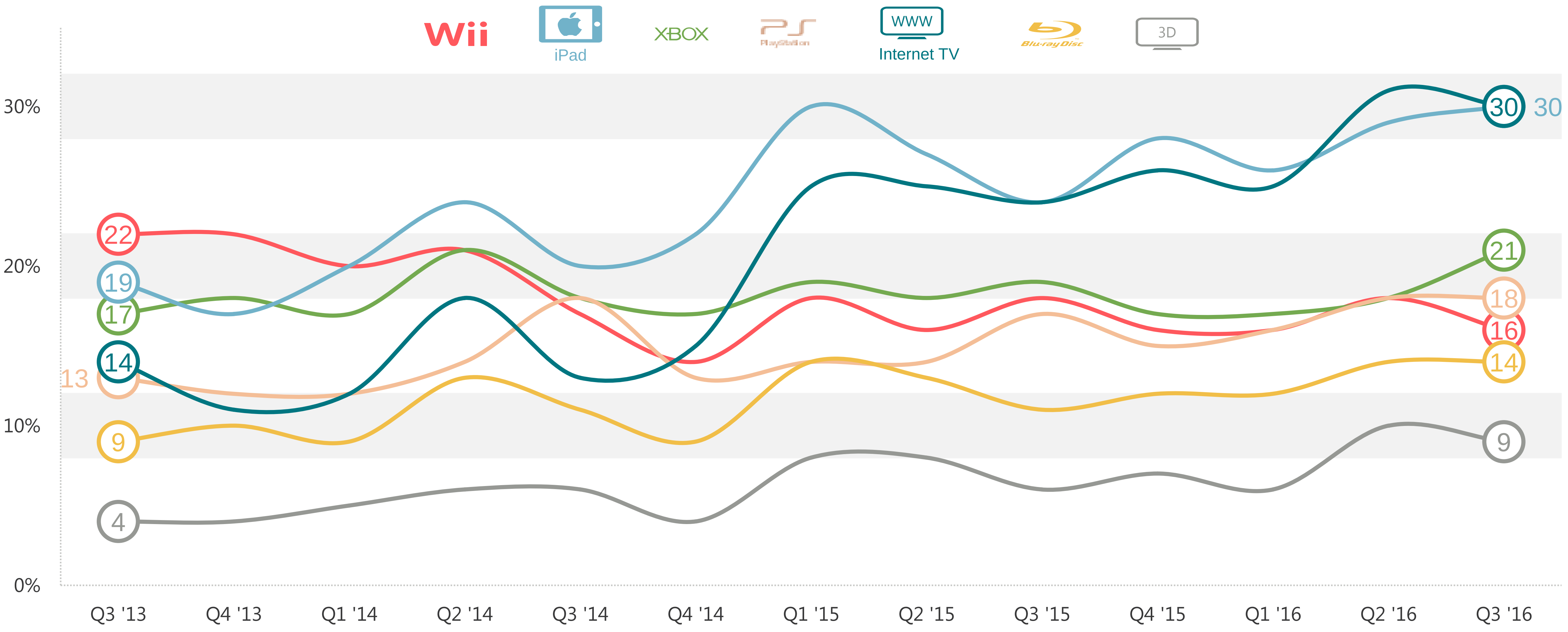
WHICH OF THE FOLLOWING DO YOU OWN/HAVE IN YOUR HOUSEHOLD?

Base: circa 1,000 GB adults aged 15+: Quarter 3 2016

Source: Ipsos MORI

Smart TV and iPad ownership is head to head

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



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

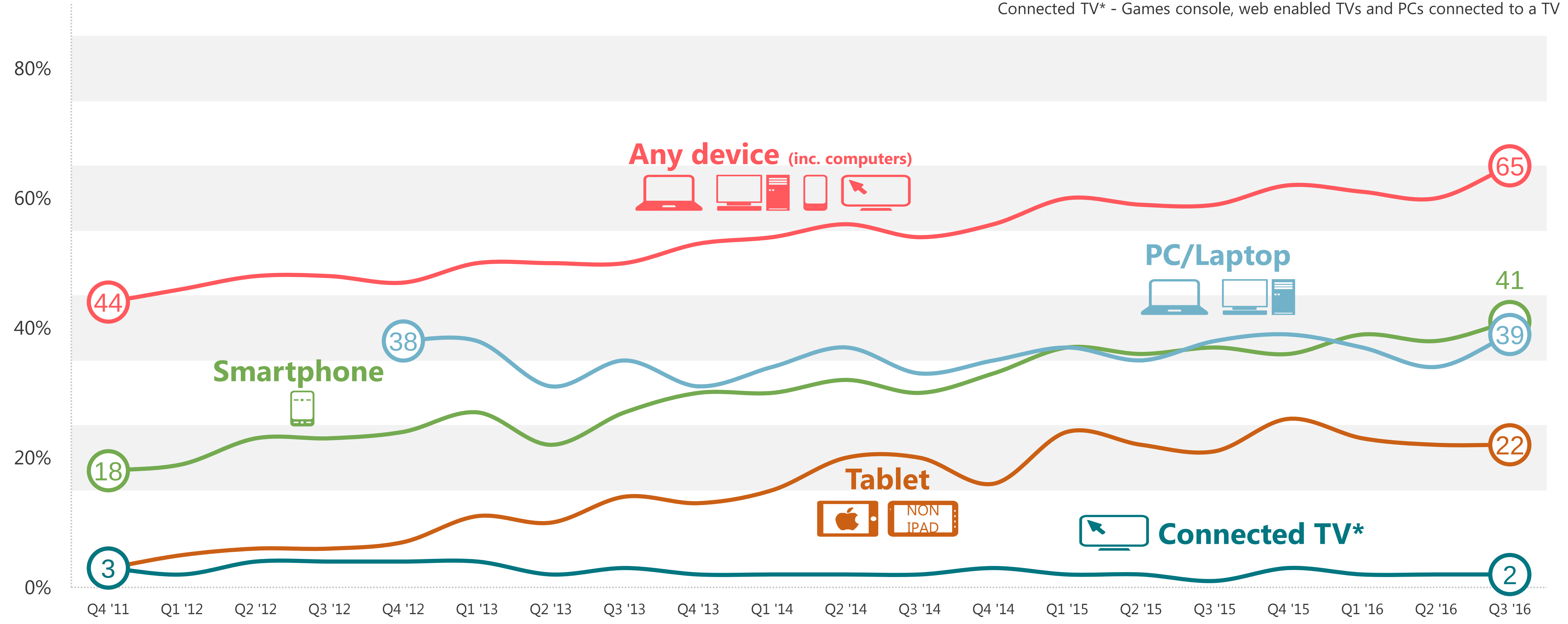
Source: Ipsos MORI

Ipsos Connect

SOCIAL NETWORKING

Social networking usage via smartphones is similar to PC/Laptop

% VISITING SOCIAL NETWORKING SITES

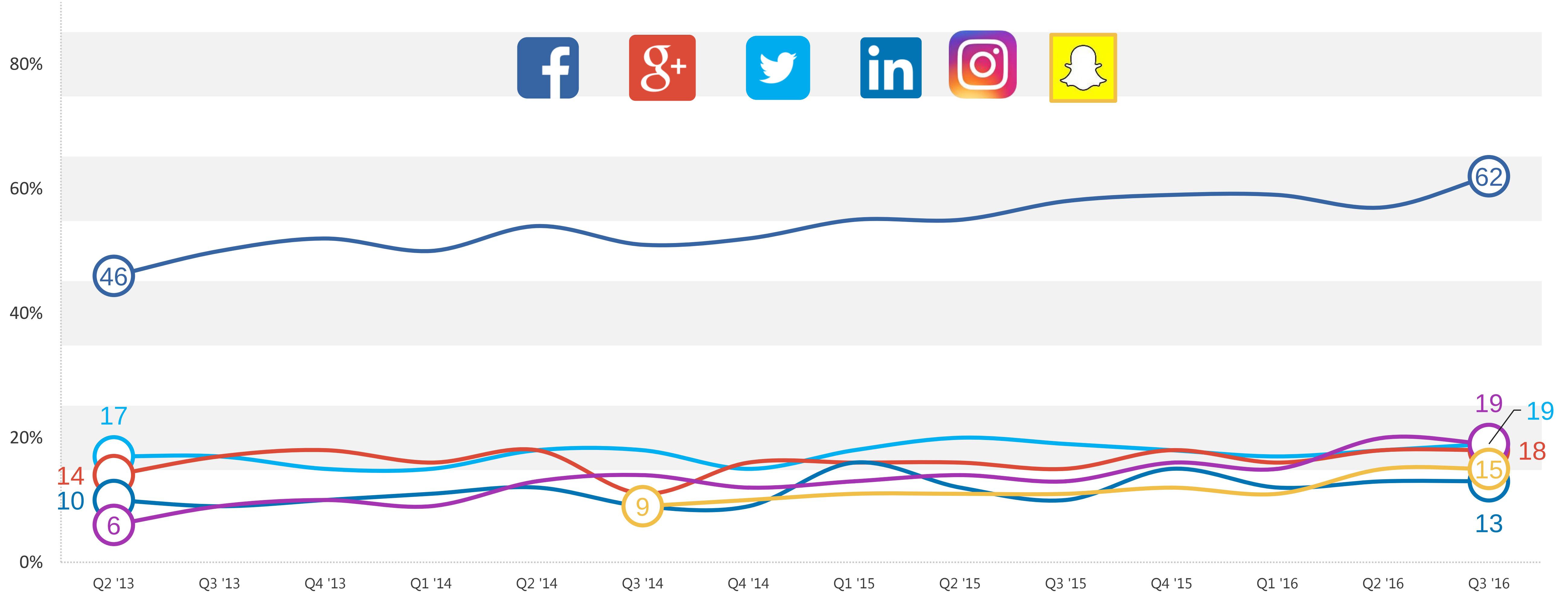


Base: circa 1,000 GB adults aged 15+ per wave

Source: Ipsos MORI

Facebook is the most visited social networking site

% VISITED IN LAST 3 MONTHS



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

Source: Ipsos MORI

Ipsos Connect

Facebook users are almost evenly spread across demographic groups…

ALL ADULTS		
49%	Male	48
51%	Female	52
15%	15-24	21
17%	25-34	24
16%	35-44	20
17%	45-54	17
36%	55+	19
27%	AB	28
27%	C1	27
21%	C2	23
24%	DE	23
75%	Own Smartphone	90
52%	Own Tablet	61

The profile of Facebook users continues to be evenly spread across the GB adult population in terms of age, with both the young and older demographics making up relatively level proportions of usage.

Smartphone and tablet ownership is higher amongst Facebook users than the GB adult population with in 9 in 10 owning a smartphone and more than 3 in 5 owning a tablet.

Base: circa GB adults (1,000) / All visiting / using Facebook in last 3 months (573) Q3 2016

Source: Ipsos MORI

... But lower usage of Facebook amongst 55+

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

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	57%	86%	77%	66%	56%	37%	24%
Males AB	58%	88%	87%	69%	58%	47%	30%
Males C1	61%	84%	70%	72%	65%	40%	28%
Males C2	56%	86%	73%	64%	60%	31%	13%
Males DE	52%	88%	76%	57%	37%	29%	20%

	All	15-24	25-34	35-44	45-54	55-64	65+
Females	62%	88%	85%	78%	63%	53%	22%
Females AB	65%	88%	86%	80%	70%	57%	28%
Females C1	64%	87%	83%	79%	67%	56%	25%
Females C2	63%	93%	85%	83%	52%	49%	23%
Females DE	55%	87%	85%	68%	56%	47%	13%

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

Base: circa 4,000 GB adults aged 15+: Q4 2015/ Q1/ Q2/ Q3 2016

Source: Ipsos MORI

Similar usage of Google+ amongst 55+ vs. younger adults (15-34)

ALL ADULTS		
49%	Male	49
51%	Female	51
15%	15-24	21
17%	25-34	21
16%	35-44	19
17%	45-54	17
36%	55+	22
27%	AB	33
27%	C1	28
21%	C2	15
24%	DE	23
75%	Own Smartphone	93
52%	Own Tablet	66

Google+ users are also evenly split among males and females and all age groups.

More than 9 in 10 own smartphones and 3 in 5 own tablets. Both smartphone and tablet ownership continues to be higher than the GB population

Base: circa GB adults (1,000) / All visiting / using Google+ in last 3 months (181) Q3 2016

Source: Ipsos MORI

Overall low usage of Google+ across demographics

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

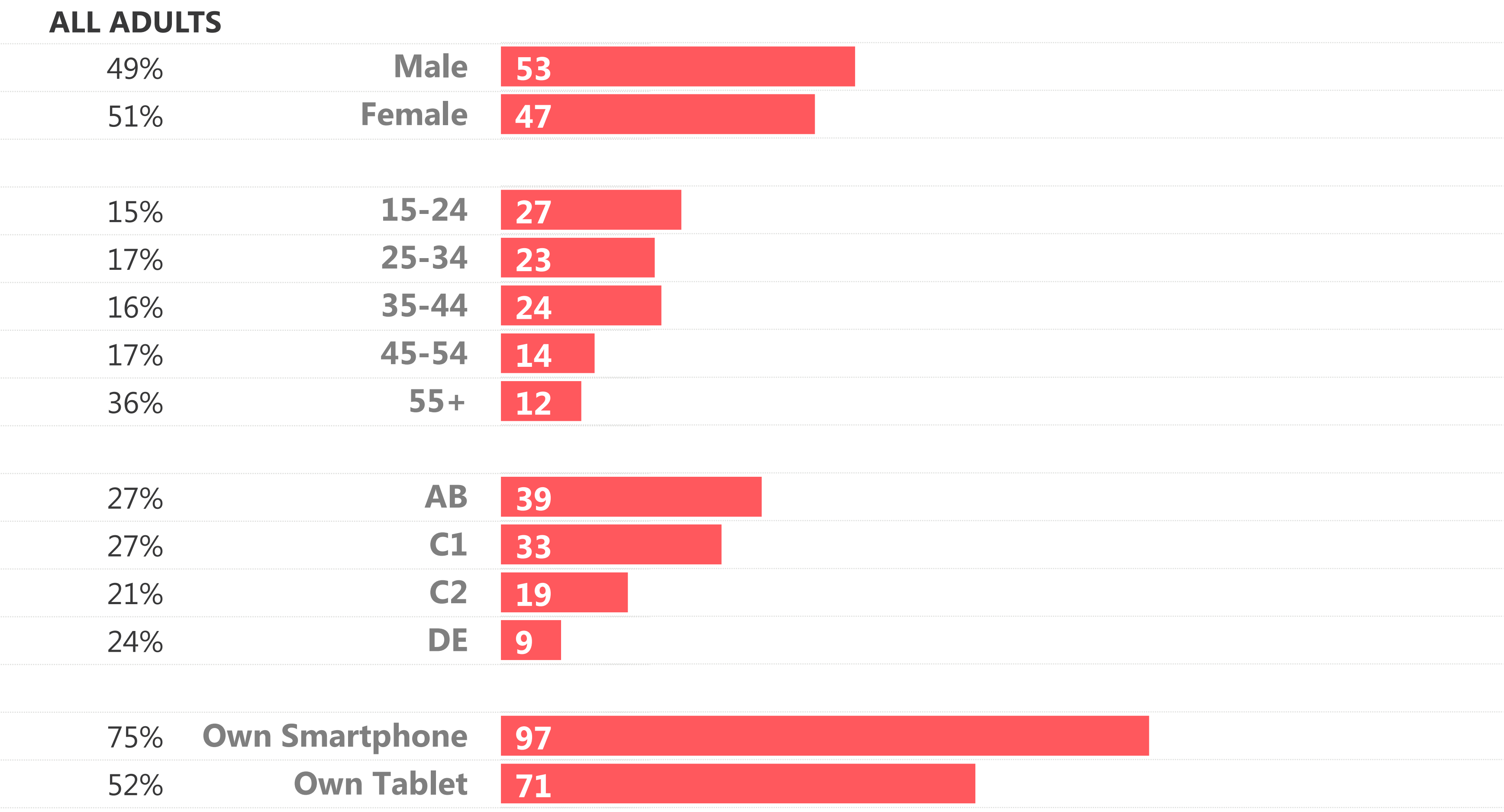
	All	15-24	25-34	35-44	45-54	55-64	65+
Males	17%	24%	19%	20%	16%	17%	8%
Males AB	18%	16%	25%	26%	14%	21%	11%
Males C1	17%	23%	15%	20%	20%	12%	13%
Males C2	14%	21%	13%	18%	18%	16%	2%
Males DE	18%	33%	25%	15%	12%	18%	3%
Females	18%	29%	22%	23%	21%	15%	5%
Females AB	18%	26%	21%	24%	23%	16%	7%
Females C1	19%	32%	22%	23%	18%	16%	7%
Females C2	17%	27%	20%	18%	18%	16%	5%
Females DE	19%	28%	27%	27%	27%	13%	3%

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

Base: circa 4,000 GB adults aged 15+: Q4 2015/ Q1/ Q2/ Q3 2016

Source: Ipsos MORI

Twitter usage is more driven by ages 15-44 and Males



Twitter is more popular amongst males, the younger generation and ABC1s.

Almost all users own a smartphone and nearly 3 out of 4 have tablets.

Base: circa GB adults (1,000) / All visiting / using Twitter in last 3 months (175) Q3 2016

Source: Ipsos MORI

Twitter most popular amongst young male ABs

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

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	20%	37%	27%	28%	17%	10%	5%
Males AB	29%	53%	53%	45%	27%	17%	6%
Males C1	23%	41%	20%	35%	19%	12%	8%
Males C2	17%	34%	19%	16%	19%	4%	4%
Males DE	9%	27%	8%	11%	1%	4%	1%
Females	16%	35%	21%	19%	14%	10%	2%
Females AB	22%	39%	30%	29%	25%	18%	3%
Females C1	17%	38%	20%	20%	17%	7%	4%
Females C2	14%	40%	20%	11%	3%	10%	3%
Females DE	10%	28%	14%	13%	3%	3%	0%

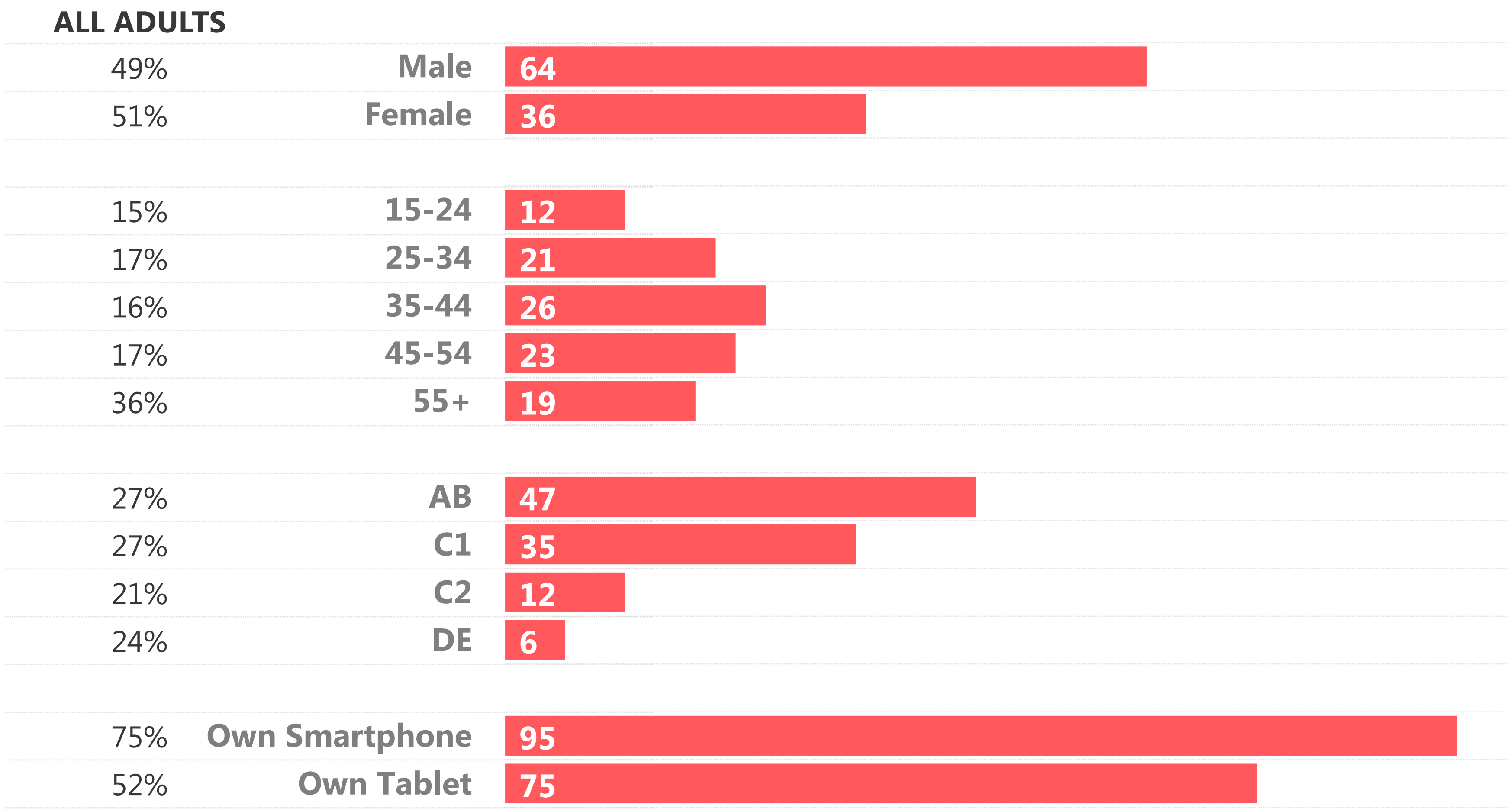
0-24% 25-49% 50-100%

Base: circa 4,000 GB adults aged 15+: Q4 2015/ Q1/ Q2/ Q3 2016

Source: Ipsos MORI

Ipsos Connect

Males and the 35-54 age group are predominant LinkedIn users



Because LinkedIn is a professional network site, it attracts a more mature audience. It is highest amongst ages 35-44 and more than 3 in 5 are male.

Base: circa GB adults (1,000) / All visiting / using LinkedIn in last 3 months (131) Q3 2016

Source: Ipsos MORI

LinkedIn is used more by ABs

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

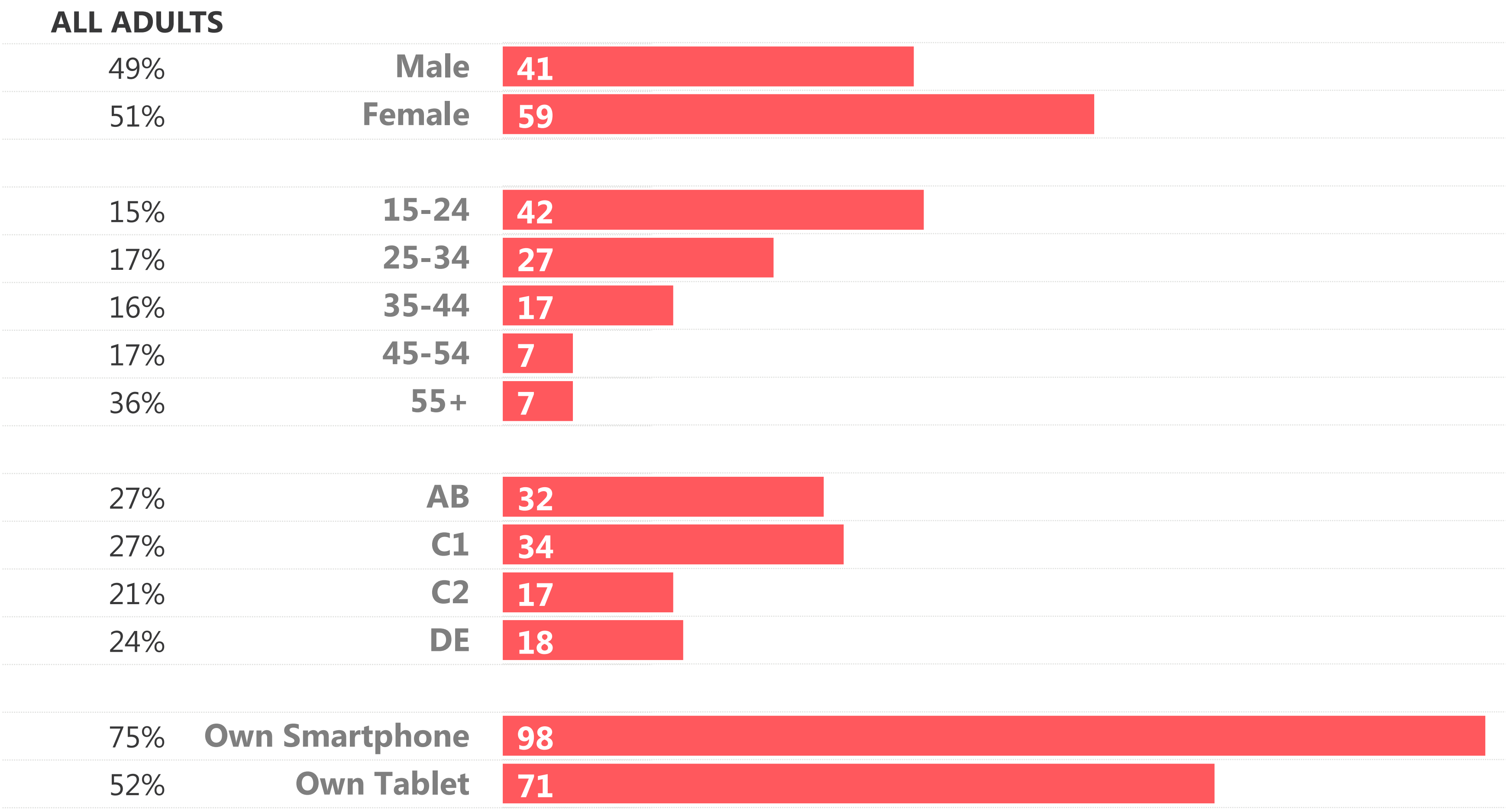
	All	15-24	25-34	35-44	45-54	55-64	65+
Males	17%	12%	19%	25%	22%	17%	8%
Males AB	31%	25%	40%	44%	39%	33%	13%
Males C1	22%	14%	25%	33%	32%	19%	7%
Males C2	6%	8%	6%	7%	9%	4%	1%
Males DE	5%	7%	0%	5%	1%	8%	5%
Females	10%	10%	13%	13%	14%	10%	3%
Females AB	22%	15%	24%	29%	28%	21%	11%
Females C1	11%	17%	18%	10%	16%	5%	1%
Females C2	5%	4%	5%	6%	5%	12%	0%
Females DE	2%	4%	3%	3%	0%	1%	0%

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

Base: circa 4,000 GB adults aged 15+: Q4 2015/ Q1/ Q2/ Q3 2016

Source: Ipsos MORI

Instagram is more popular amongst females and 15-24 year olds



More than half of Instagram users are female, almost half of them aged 15-24 and 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 (172) Q3 2016

Source: Ipsos MORI

7 in 10 AB females aged 15-24 use Instagram

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

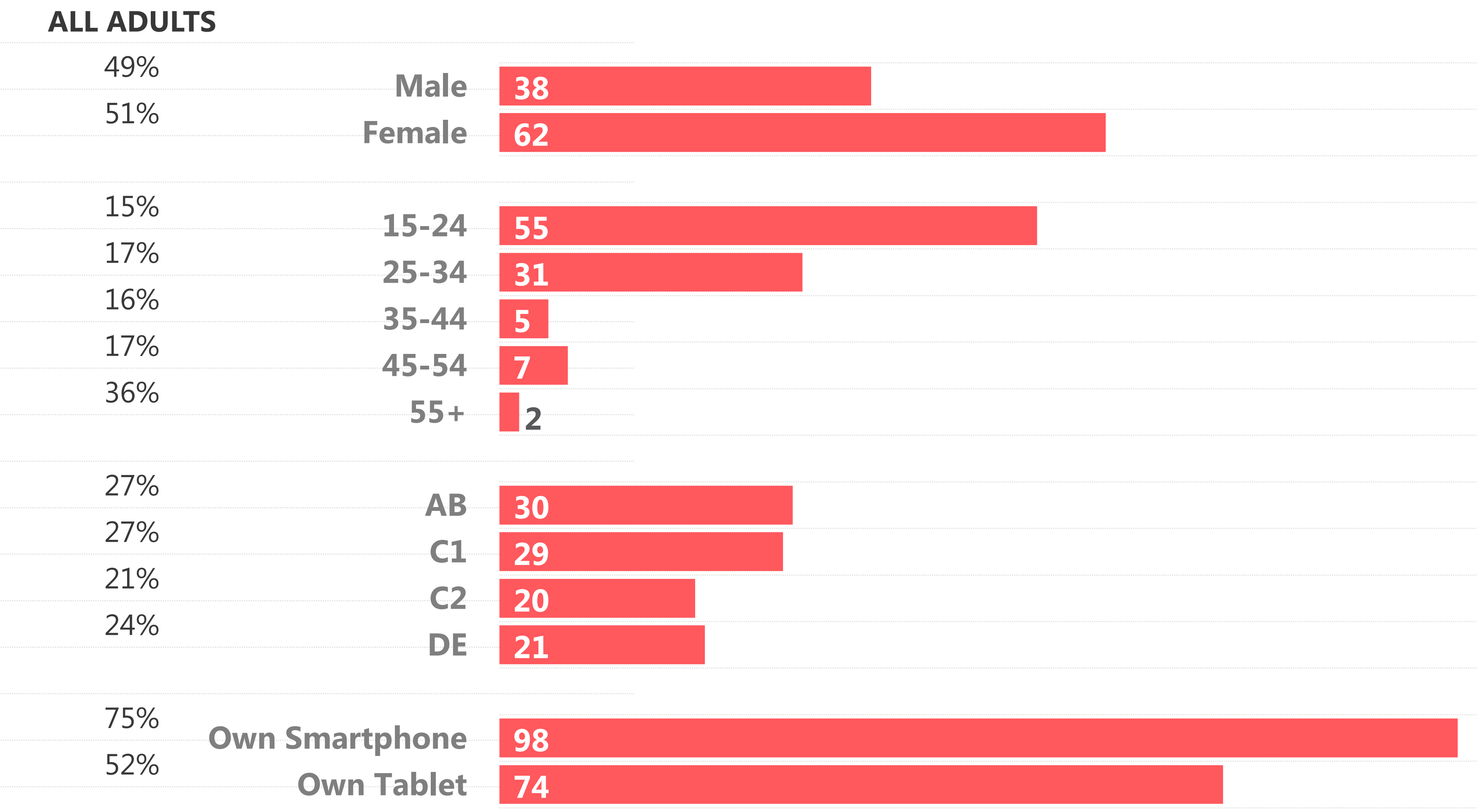
	All	15-24	25-34	35-44	45-54	55-64	65+
Males	15%	40%	25%	15%	8%	6%	1%
Males AB	18%	43%	42%	17%	14%	12%	2%
Males C1	18%	45%	25%	20%	10%	3%	3%
Males C2	13%	37%	17%	10%	6%	2%	0%
Males DE	11%	37%	9%	9%	0%	4%	0%
Females	19%	55%	32%	21%	10%	6%	1%
Females AB	21%	70%	41%	24%	18%	8%	1%
Females C1	21%	56%	30%	24%	13%	7%	1%
Females C2	18%	48%	28%	21%	3%	6%	1%
Females DE	16%	52%	29%	11%	3%	3%	0%

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

Base: circa 4,000 GB adults aged 15+: Q4 2015/ Q1/ Q2/ Q3 2016

Source: Ipsos MORI

Snapchat users are also mainly female and 15-24 years old



More than half of all Snapchat users are aged 15-24. They are more likely to be ABC1 and female.

Snapchat functionality also lends itself to almost universal smartphone ownership.

Base: circa GB adults (1,000) / All visiting / using Snapchat in last 3 months (131) Q3 2016

Source: Ipsos MORI

Almost 8 in 10 Snapchat users are AB females aged 15-24

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

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	12%	45%	20%	6%	4%	2%	0%
Males AB	12%	52%	32%	8%	6%	2%	0%
Males C1	14%	51%	20%	7%	2%	1%	1%
Males C2	12%	37%	17%	2%	7%	2%	1%
Males DE	11%	42%	7%	4%	0%	2%	0%
Females	15%	55%	21%	9%	8%	2%	1%
Females AB	15%	77%	23%	11%	13%	2%	1%
Females C1	16%	60%	18%	9%	7%	3%	1%
Females C2	13%	44%	20%	13%	4%	0%	0%
Females DE	15%	49%	24%	5%	5%	1%	1%

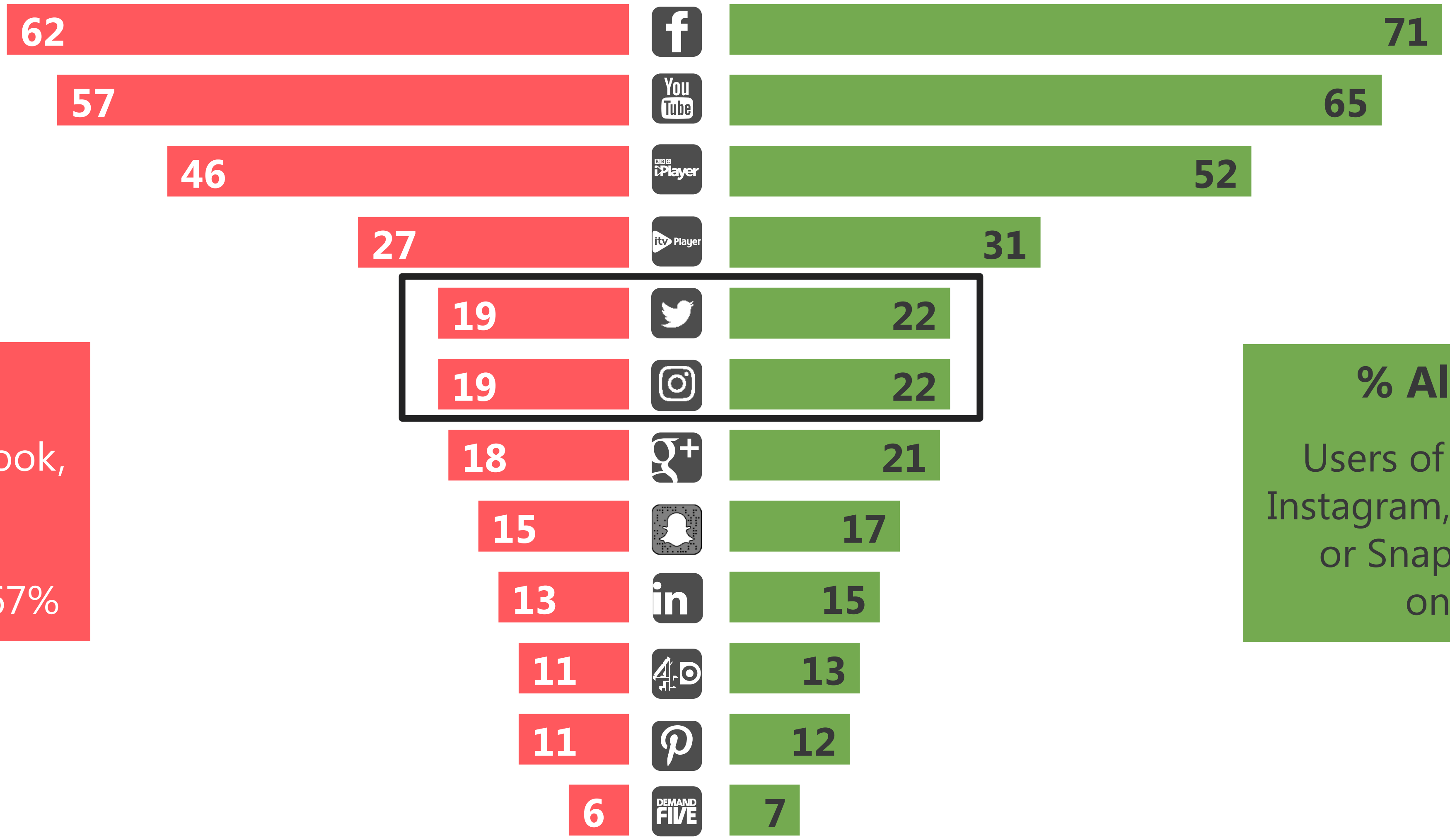
0-24% | 25-49% | 50-100%

Base: circa 4,000 GB adults aged 15+: Q4 2015/ Q1/ Q2/ Q3 2016

Source: Ipsos MORI

Usage of Twitter and Instagram is neck and neck

% VISITED IN LAST 3 MONTHS



% All adults

Users of either Facebook, Instagram, Twitter, LinkedIn or Snapchat amongst all adults - 67%

% All online adults

Users of either Facebook, Instagram, Twitter, LinkedIn or Snapchat amongst all online adults - 76%

Base: circa GB adults 1,000 adults aged 15+: Q3 2016

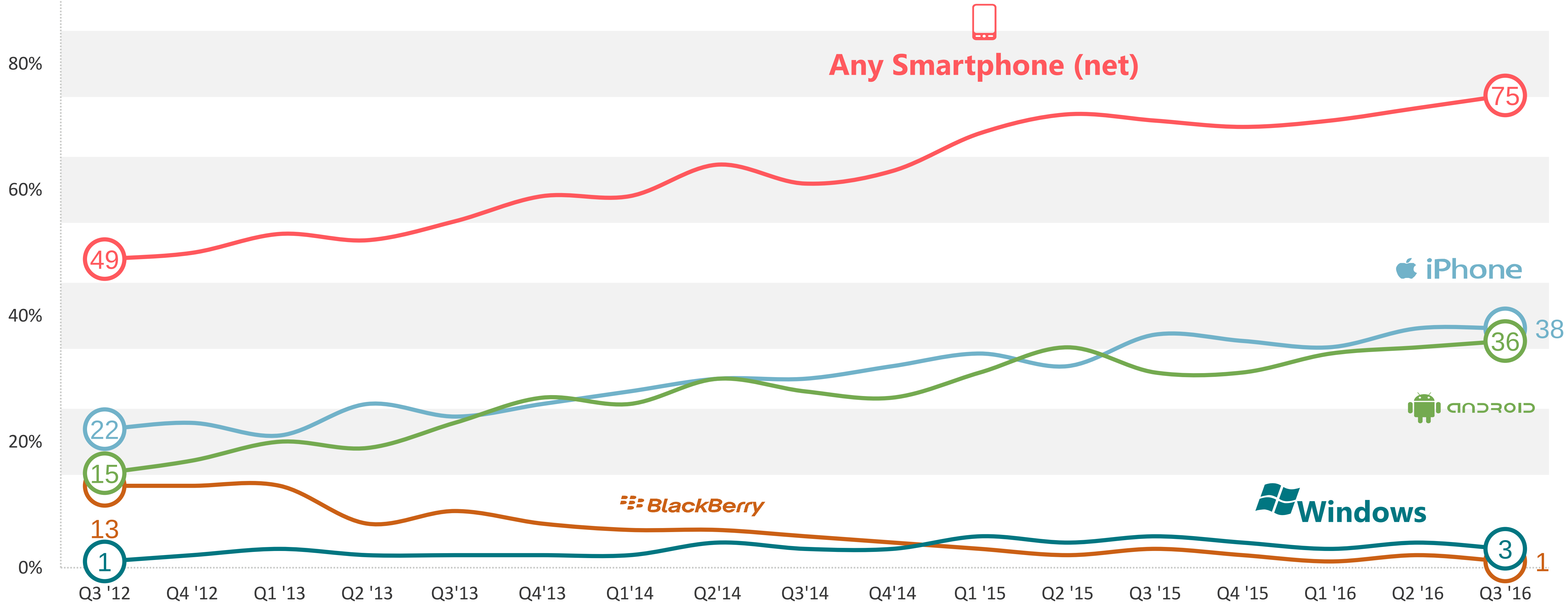
Base: 846 GB online adults aged 15+: Q3 2016

Source: Ipsos MORI

SMARTPHONE OWNERSHIP

Three quarters of GB adults have a smartphone

% OWNED BY MANUFACTURER



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

Source: Ipsos MORI

Overall lower usage of smartphone amongst 65+

% OWN A SMARTPHONE BY GENDER AND SOCIAL GRADE

	All%	15-24%	25-34%	35-44%	45-54%	55-64%	65+%
Males%	74%	95%	93%	88%	76%	63%	35%
Males AB%	78%	99%	96%	92%	82%	75%	52%
Males C1%	81%	96%	95%	95%	85%	70%	37%
Males C2%	71%	94%	89%	84%	78%	52%	22%
Males DE%	63%	93%	90%	78%	53%	51%	16%
Females%	71%	96%	94%	89%	81%	57%	26%
Females AB%	76%	100%	95%	97%	89%	70%	29%
Females C1%	75%	97%	93%	90%	85%	63%	33%
Females C2%	74%	93%	94%	89%	81%	56%	35%
Females DE%	58%	94%	92%	78%	65%	34%	12%

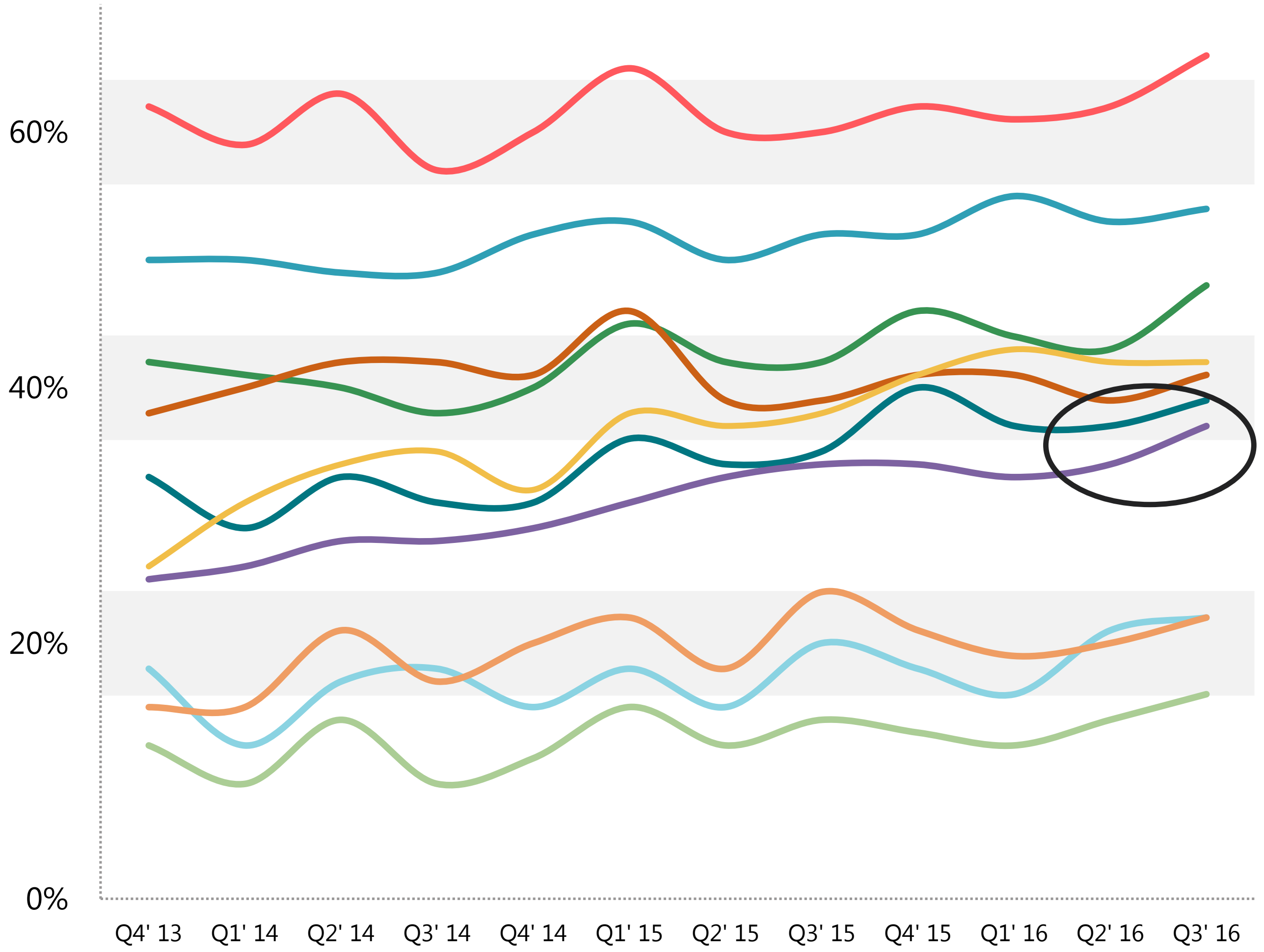
0-24% 25-49% 50-100%

Base: circa 4,000 GB adults aged 15+: Q4 2015/ Q1/ Q2/ Q3 2016

Source: Ipsos MORI

Online shopping has largest growth in the last quarter

USE OF SMARTPHONE IN THE PAST 3 MONTHS



66% Read or send emails

54% Visit social networking sites

48% Browse websites for personal interests

42% Online banking

41% Download apps for free

39% Watch video clips on sites such as Youtube

37% Online shopping

22% Use instant messaging services such as BBM

22% Download/ stream music over the internet

16% Watch catch-up TV

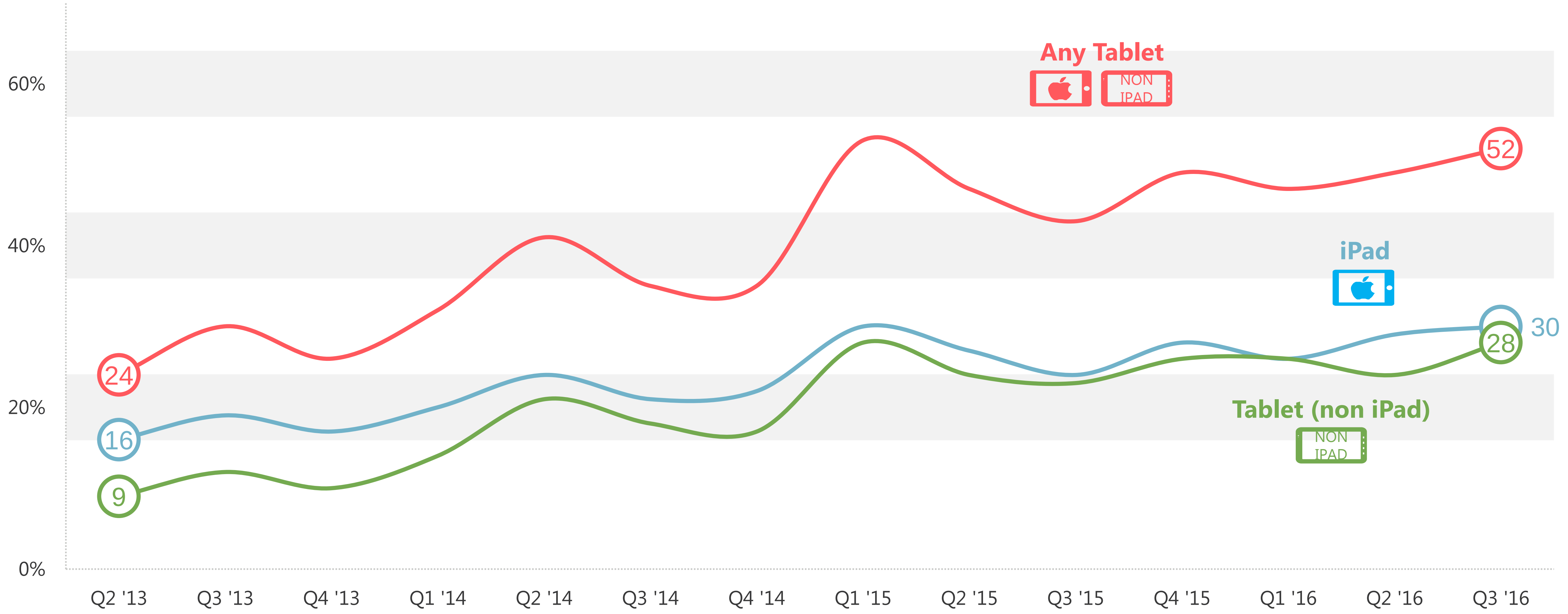
Base: circa 500-750 smartphone owners per wave

Source: Ipsos MORI

TABLET OWNERSHIP

Ownership of iPad vs. non iPad is similar

% OWN A TABLET IN THE HOUSEHOLD



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

Source: Ipsos MORI

Higher ownership of tablets amongst ABs compared to others

% OWN A TABLET BY GENDER AND SOCIAL GRADE ACROSS

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	51%	47%	61%	58%	53%	51%	37%
Males AB	65%	67%	83%	69%	72%	66%	47%
Males C1	52%	48%	58%	63%	48%	56%	37%
Males C2	46%	41%	54%	52%	54%	38%	35%
Males DE	36%	42%	43%	42%	33%	37%	21%
Females	48%	51%	55%	56%	55%	48%	30%
Females AB	62%	67%	62%	64%	75%	59%	47%
Females C1	49%	47%	54%	59%	53%	56%	34%
Females C2	43%	41%	58%	53%	45%	39%	27%
Females DE	36%	53%	48%	44%	37%	34%	14%

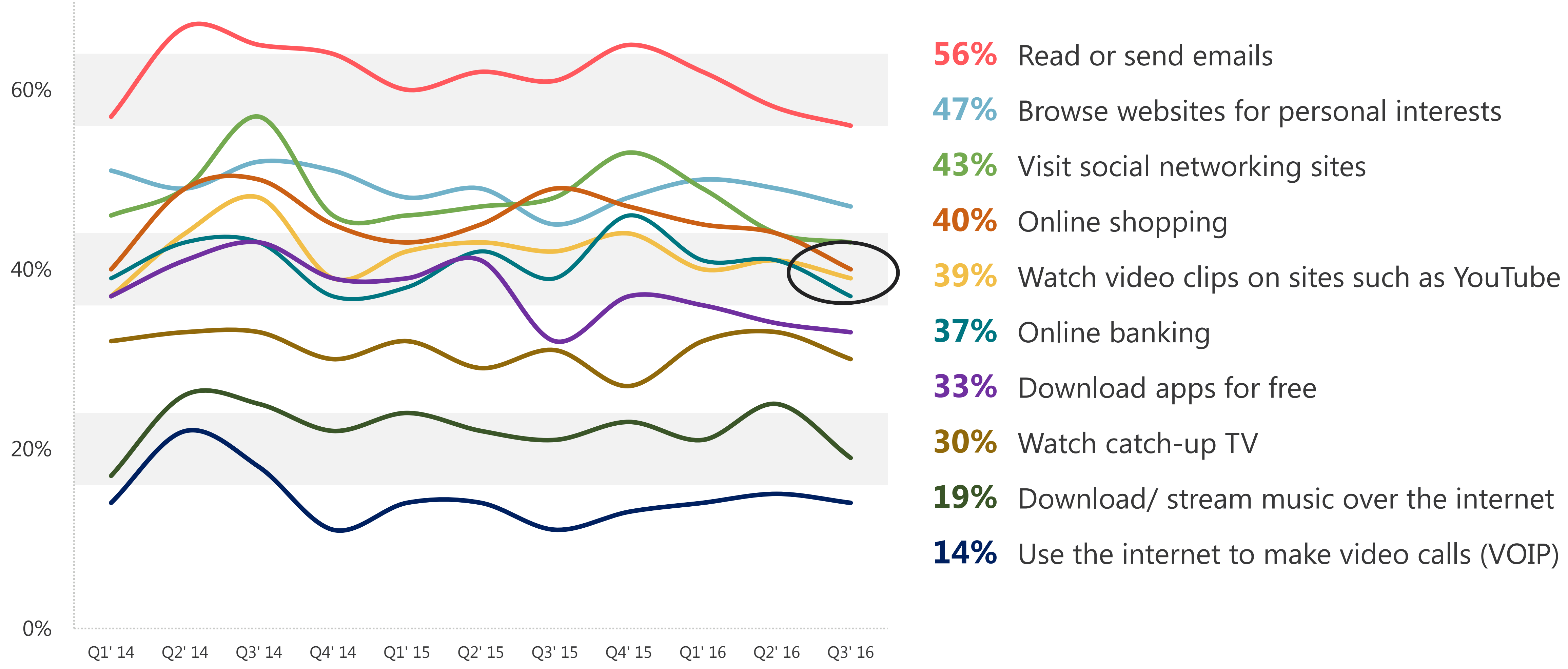
0-24% 25-49% 50-100%

Base: circa 4,000 GB adults aged 15+: Q4 2015/ Q1/ Q2/ Q3 2016

Source: Ipsos MORI

Similar usage of online shopping and watching video clips

USE OF TABLET IN THE PAST 3 MONTHS



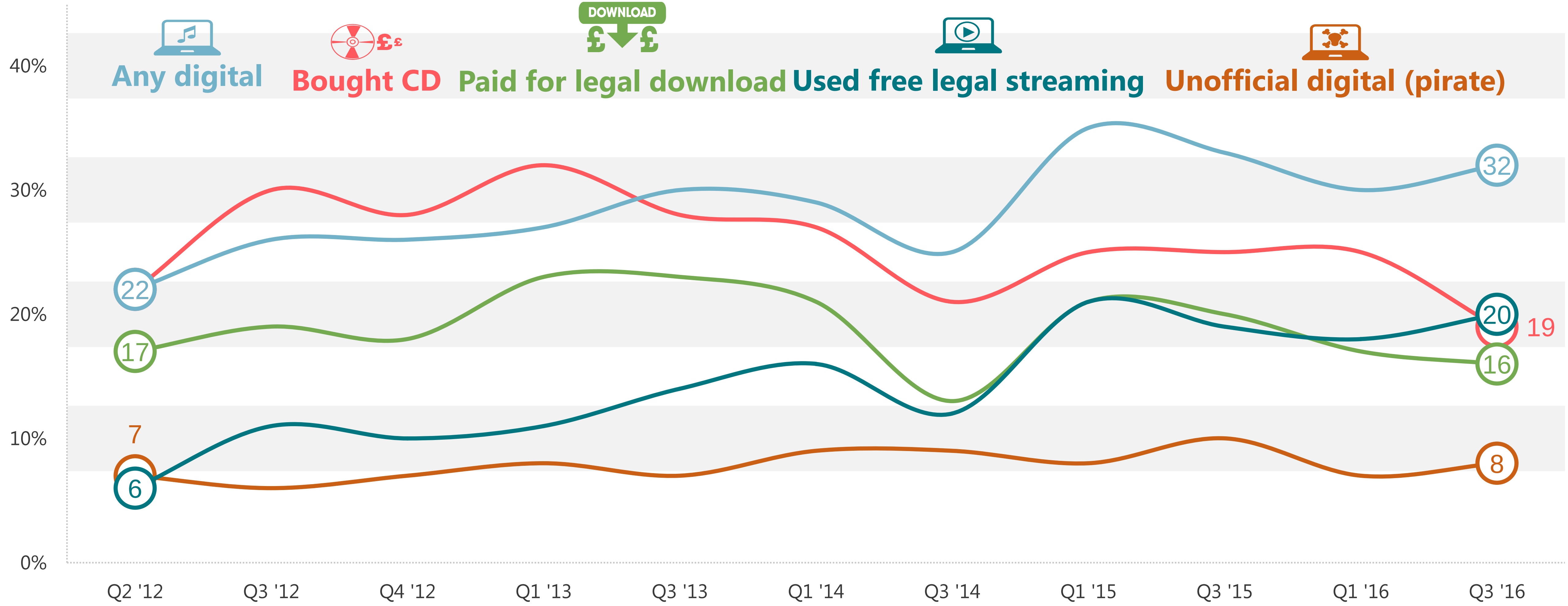
Base: circa 300-500 adults 15+ who own tablets

Source: Ipsos MORI

CONTENT CONSUMPTION
Music / Games / TV / Movies

Music consumption through CDs declining compared to digital consumption

MUSIC CONSUMPTION

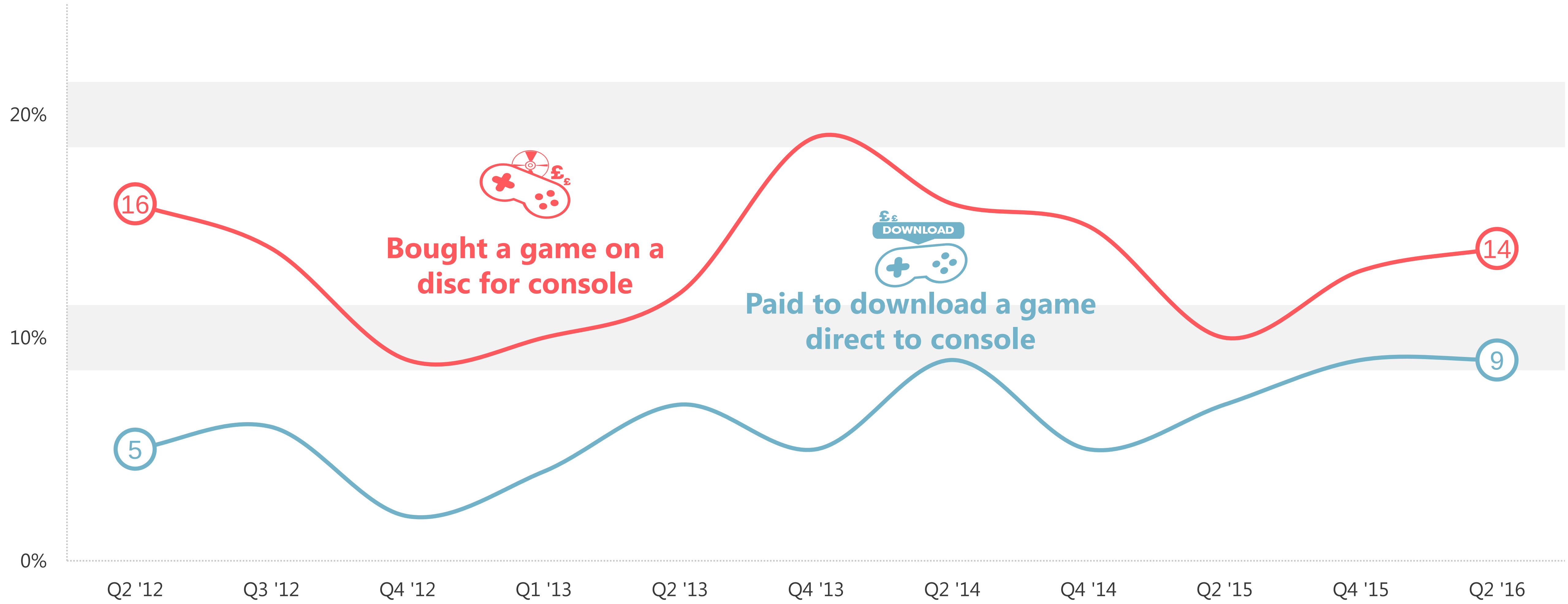


Base: circa 1,000 GB adults aged 15+ per wave / Music consumption is tracked every 6 months

Source: Ipsos MORI

Buying of discs for games consoles remains higher

GAMES CONSUMPTION

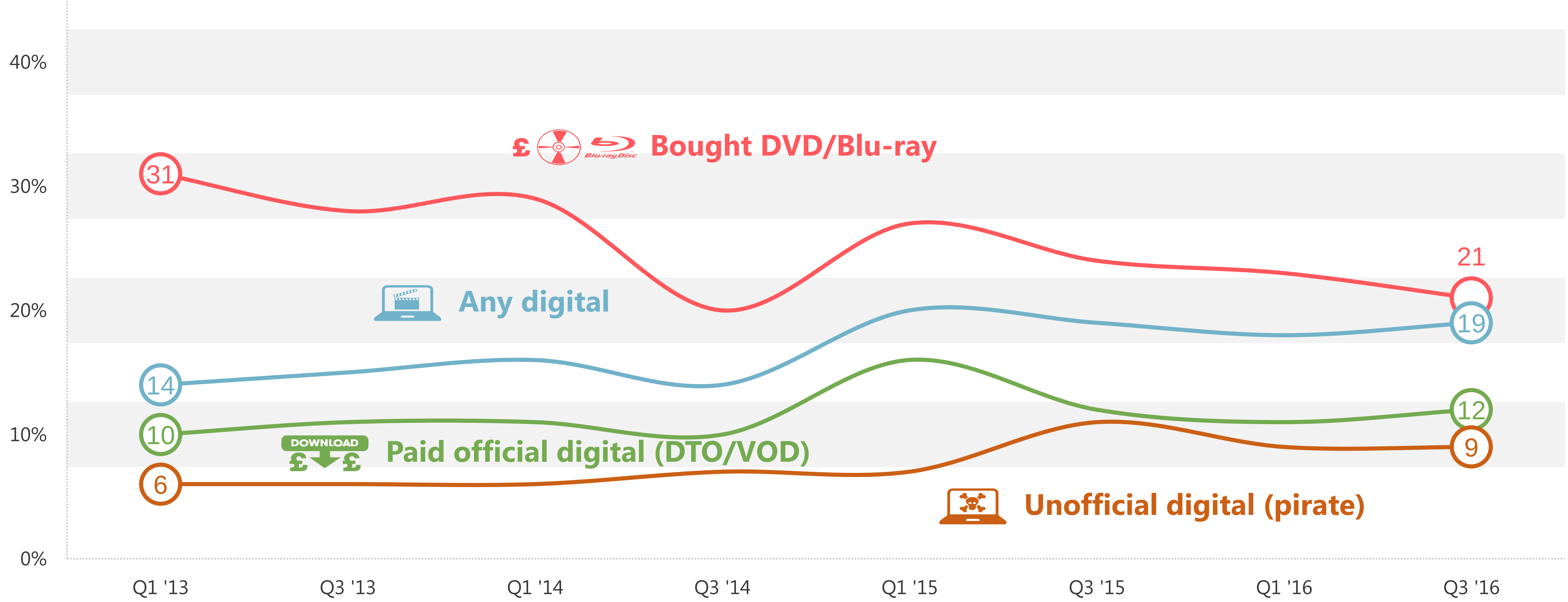


Base: circa 1,000 GB adults aged 15+ per wave / Games consumption is tracked every 6 months

Source: Ipsos MORI

Digital consumption closes the gap with DVDs and Blu-rays

MOVIE CONSUMPTION

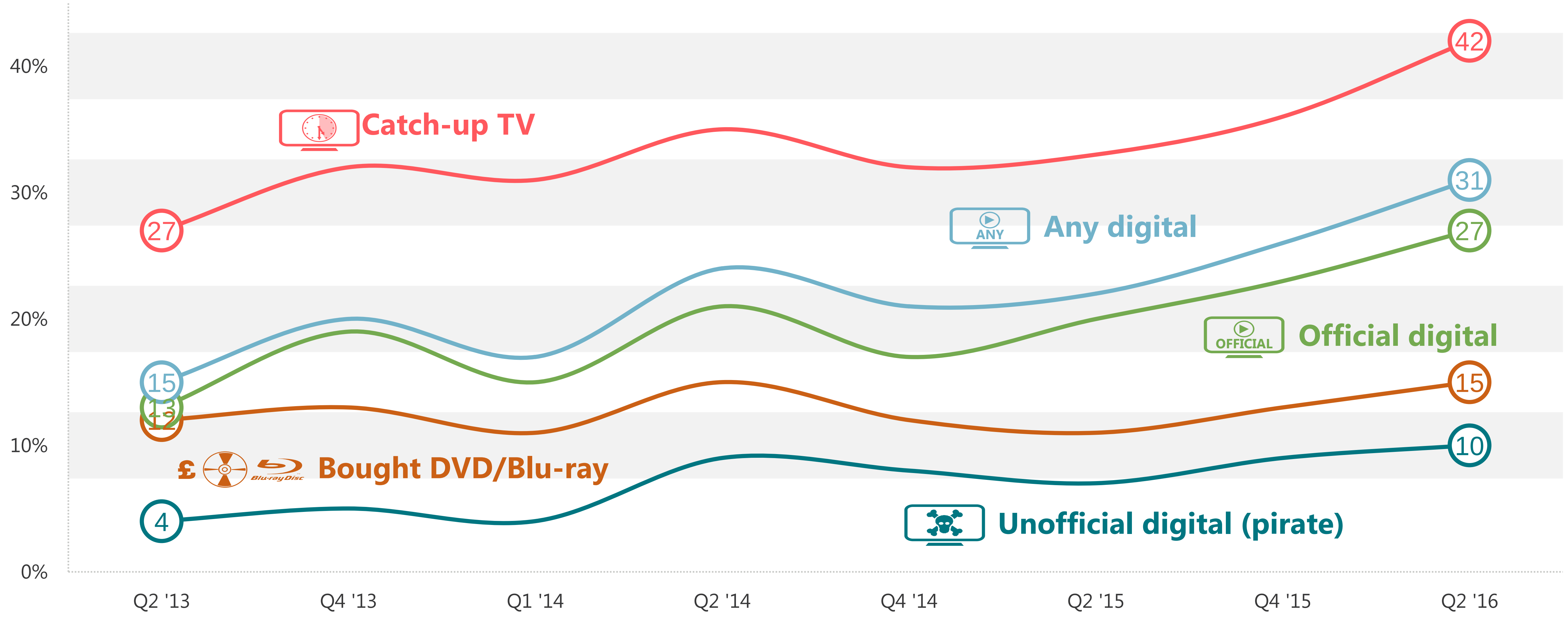


Base: circa 1,000 GB adults aged 15+ per wave / Movie consumption is tracked every 6 months

Source: Ipsos MORI

4 in 10 GB adults watch catch-up TV

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 **1001 adults aged 15+ in GB**.
- The latest interviews were carried out face to face **15th – 21st July 2016**.
- 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.

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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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For more information

Prachi Jain
e: **Prachi.Jain@ipsos.com**

Ipsos MORI
3 Thomas More Square
London
E1W 1YW

t: +44 (0)20 3059 4792

ipsos-mori.com/ipsosconnect

@ipsosconnectuk

Eda Koray
e: **Eda.Koray@ipsos.com**

Ipsos MORI
Kings House, Kymberley Road
Harrow
HA1 1PT

t: +44 (0)20 8861 8775

ipsos-mori.com/ipsosconnect

@ipsosconnectuk

Jonny Pollick
e: **Jonathan.Pollick@ipsos.com**

Ipsos MORI
Kings House, Kymberley Road
Harrow
HA1 1PT

t: +44 (0)20 8861 8013

ipsos-mori.com/ipsosconnect

@ipsosconnectuk

Ipsos Connect

www.ipsos-mori.com/ipsosconnect