Technology Tracker

TECH TRACKER

QUARTERLY RELEASE:

Q4 2017

Ipsos

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 4 2017 (3rd November – 13th November 2017)

REPRESENTATIVE SAMPLE OF c.1000 GB ADULTS AGED 15+

AREAS COVERED

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

Summary

Awareness of voice-activated speakers is increasing; over half of GB adults claim to know a little bit about them. However, ownership is still low; 5% currently own a voice activated speaker and just 10% of non-owners are likely to buy in the next 12 months.

Streaming music, listening to the radio and checking the weather are likely to be the most common activities undertaken on voice-activated speakers among non-owners. This potentially provides a huge opportunity for radio and streaming services.

However, there are still barriers to usage, with **privacy concerns from some about conversations being recorded**. Awareness of their functions also provides a barrier to usage, with 23% of non-owners believing that voice activated speakers don't do very much. It seems that people know they exist, but not what they can do with them.

Facebook remains the social media platform used by the most people in the past 3 months, with Instagram coming in second (but still achieving less than half the number of Facebook users).

Whilst **digital consumption of music and movies continues to strengthen** year on year, gaming does not see the same shift, with **physical video games continuing their prominence over digital copies**.

VOICE ACTIVATED SPEAKERS

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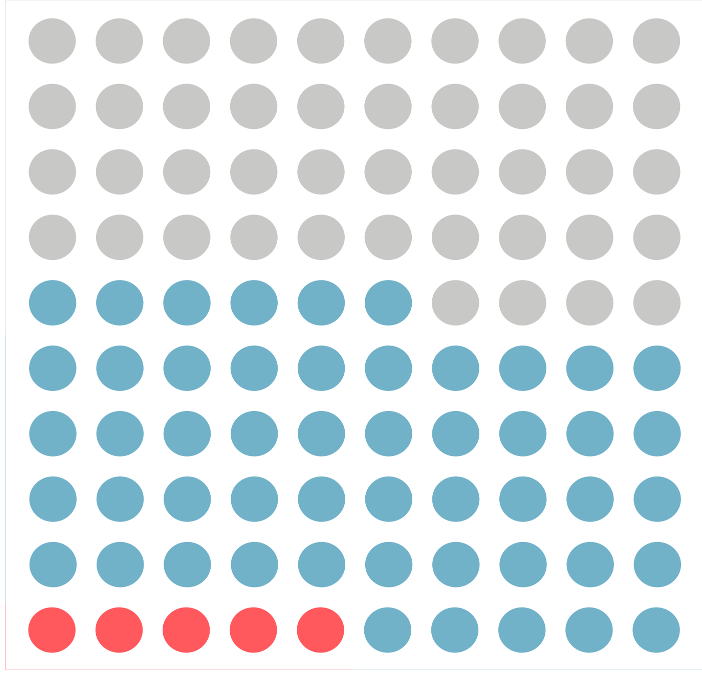
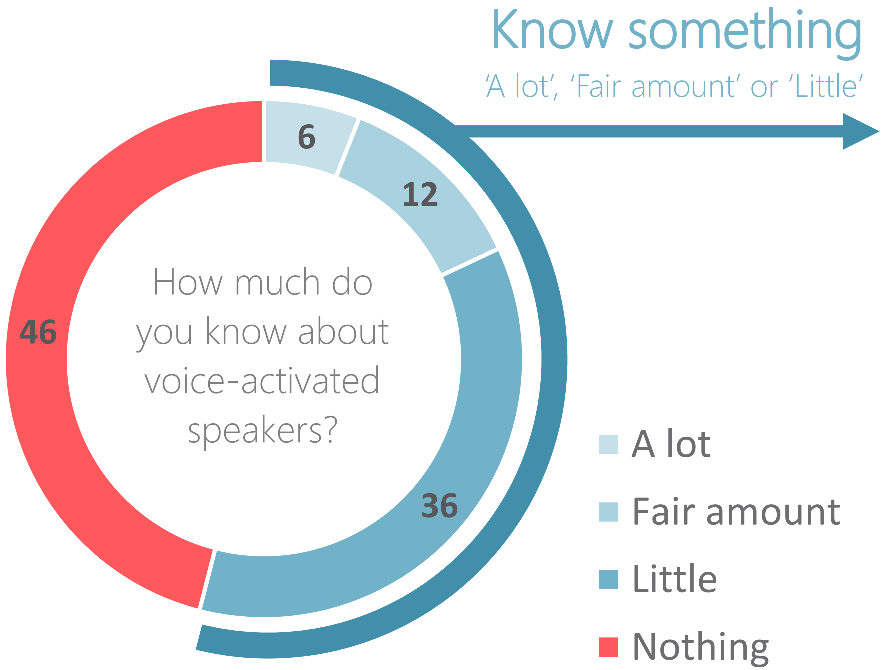
Despite just 5% ownership, over half of GB adults know about voice-activated speakers (higher among males and 15-34's)

Ownership and knowledge of voice-activated speakers

54% know at least "a little" about voice-activated speakers



5% own a voice-activated speaker



54%

MALE (59%) ↑
FEMALE (48%)

15-34 (64%) ↑
35+ (49%)

W. CHILDREN (60%) ↑
W/O. CHILDREN (51%)

NON-OWNERS WHO ARE LIKELY TO BUY (85%)

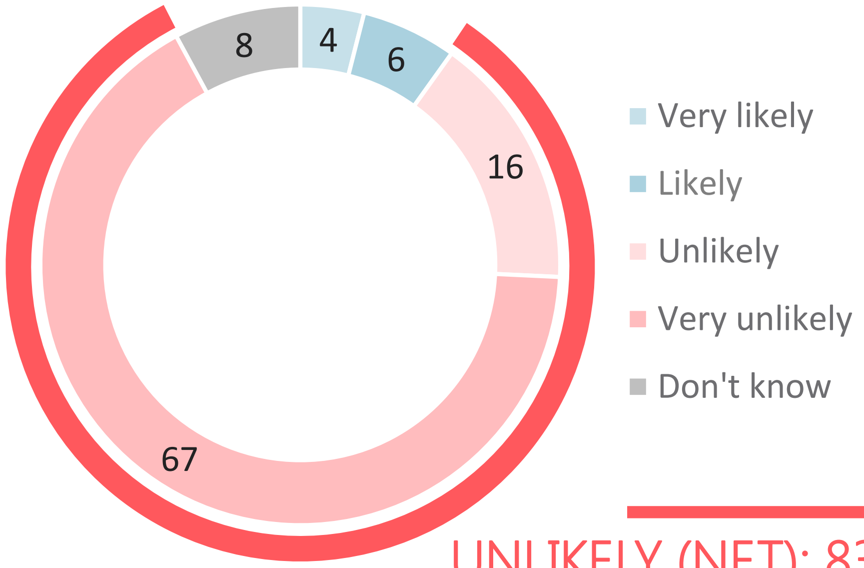
Base: All respondents (965)
TK01a Which of the following applies to you? Please mention all that apply; VS1. How much do you feel you know about Voice Activated Speakers?

↑ Significantly higher than opposite

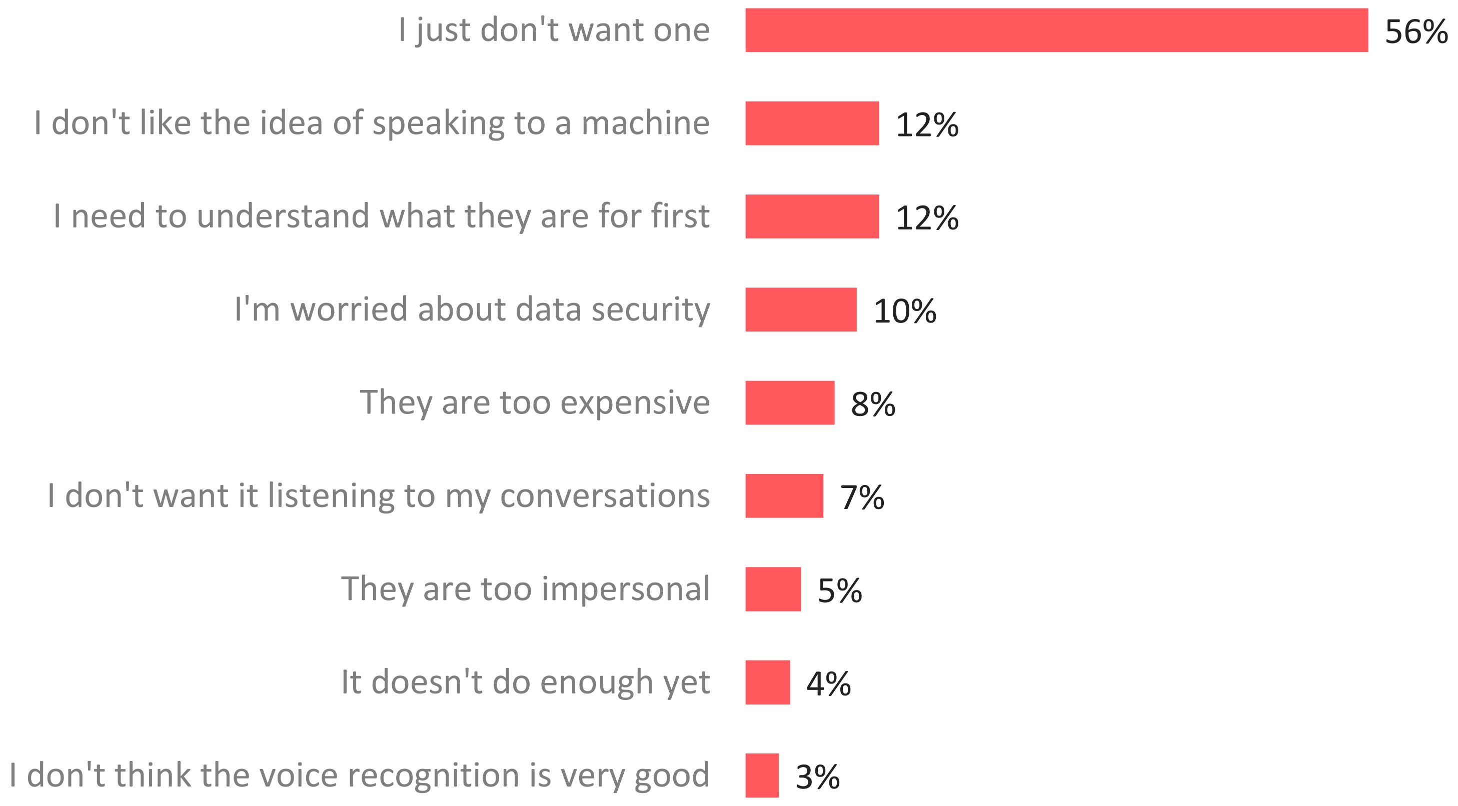
4 in 5 non-owners are unlikely to own one in the next year, although M15-34's are more likely to than anyone else

Likelihood of future ownership and reasons for being unlikely to own

Only 10% of non-owners are likely to buy in the future, which increases to 18% among M15-34's



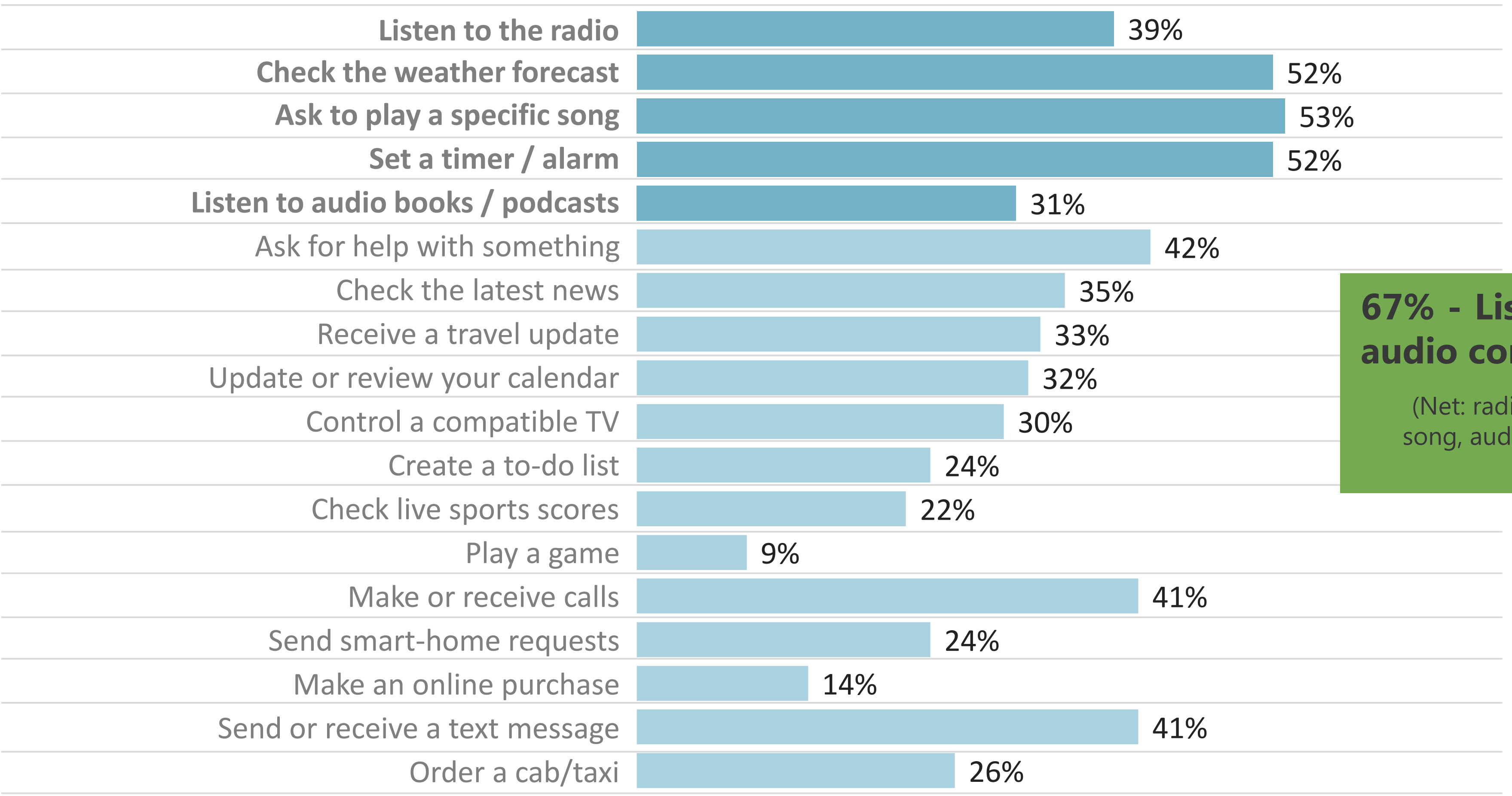
UNLIKELY (NET): 83%



Base: All who do not own a voice-activated speaker (918); All who do not own and who are not likely to buy one (765)
VS4. How likely are you to own Voice Activated Speakers within the next 12 months?; VS5.What is preventing you from getting a Voice Activate Speaker? Select all that apply.

Among likely purchasers, speakers would mostly be used for music, checking the weather, and setting alarms/timers

Main things voice-activated speakers would be used for



67% - Listen to audio content

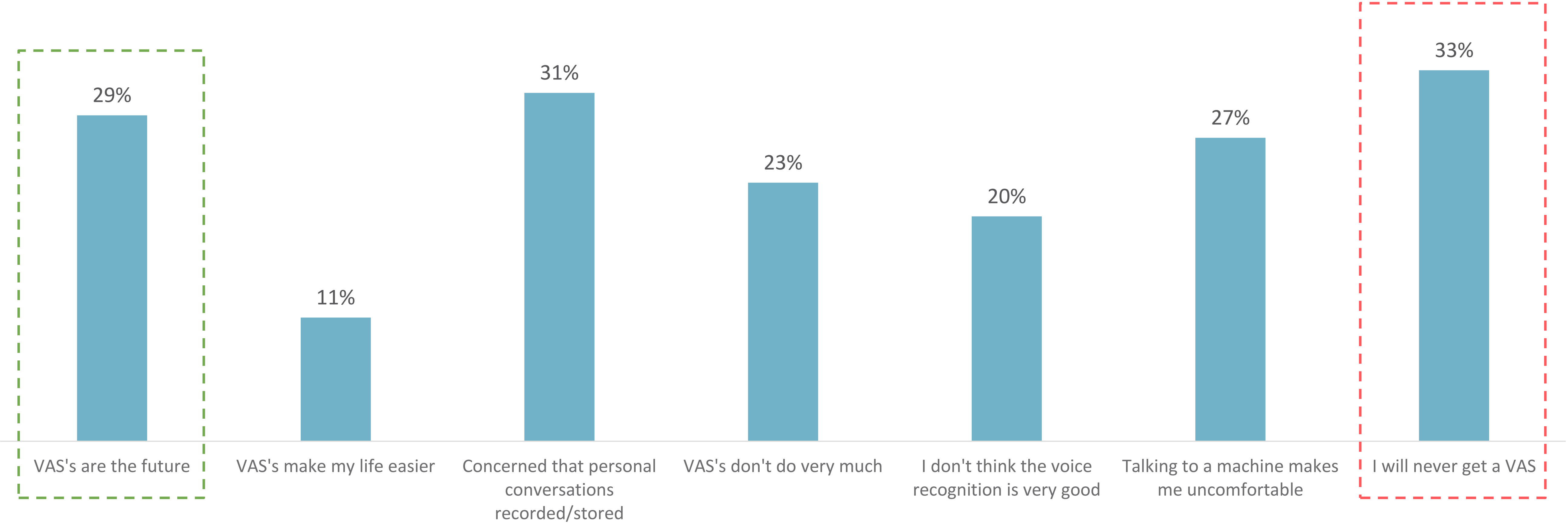
(Net: radio, specific song, audio books / podcasts)

Base: All non-owners who are likely to buy a voice-activated speaker in the future (87)
VS7. Which, if any, of the following things do you think you would use Voice Activated Speakers for?

3 in 10 non-owners think that VAS are the future, although a similar amount claim they will never get a VAS

Attitudes towards voice-activated speakers

Non-owners (Agree – T2B):



Base: All who do not own a voice-activated speaker (918)
VS9. To what extent, if at all, do you agree with the following statements?

Scores are based on T2B: A combination of 'Strongly agree' and 'Agree'
VAS = voice-activated speaker

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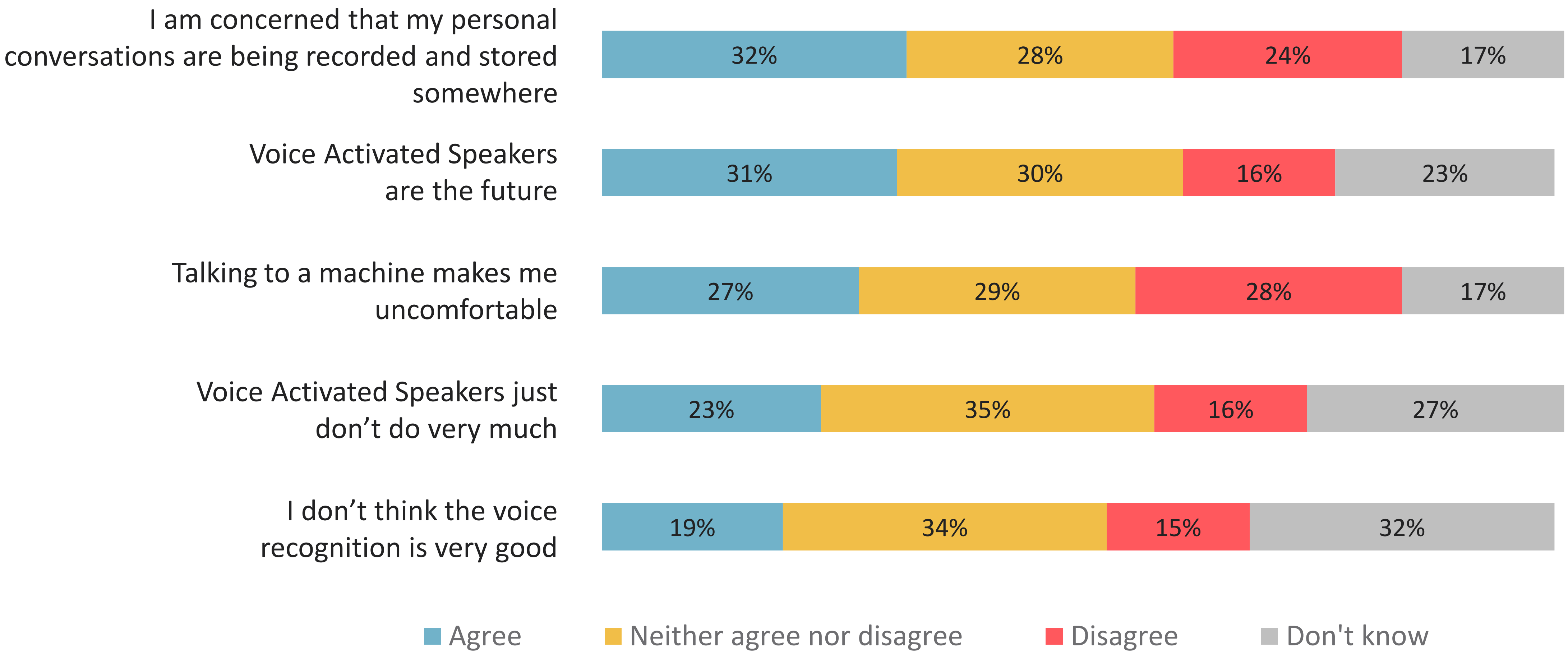
1 in 3 adults worry about conversations being recorded, whilst 1 in 4 feel uncomfortable talking to a machine

Attitudes towards voice-activated speakers

All respondents:



Base: All respondents (965)
VS9. To what extent, if at all, do you agree with the following statements?

'Agree' and 'Disagree' scores are based on T2B:
'Agree' = 'Strongly agree' and 'Agree'; 'Disagree' = 'Strongly disagree' and 'Disagree'

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INTERNET USAGE

HOW, WHEN, WHERE

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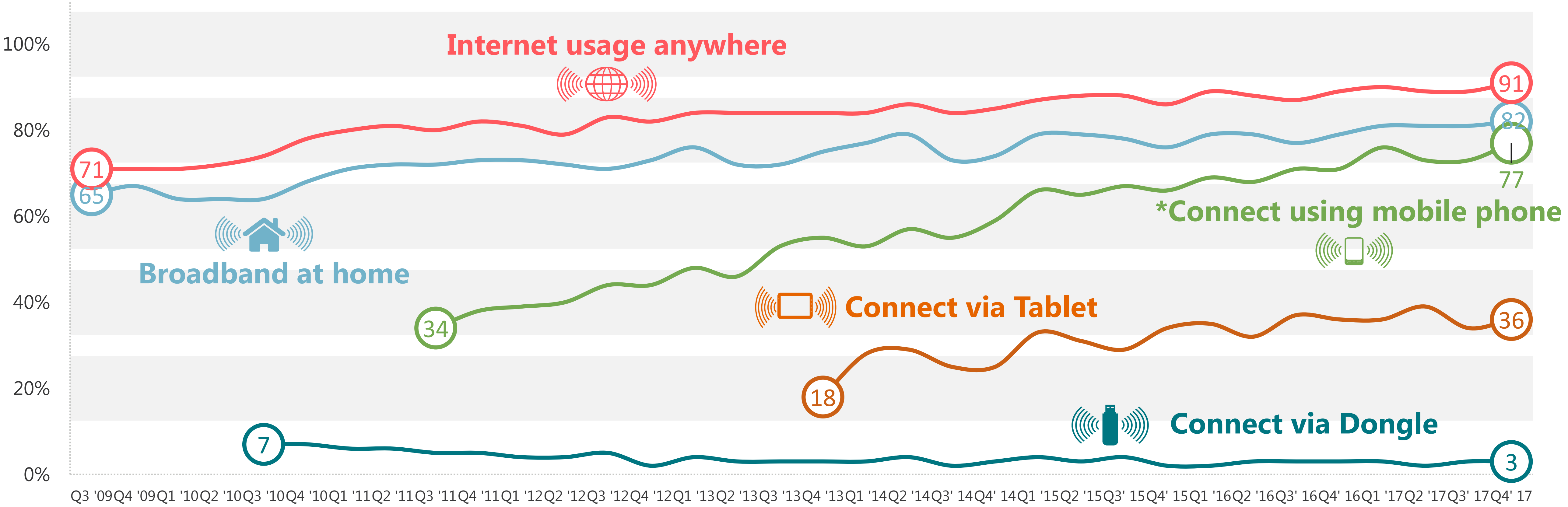
9 in 10 GB adults access the internet, with increase in connectivity via a mobile phone showing no signs of slowing down

% 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

Three quarters of males and 3 in 5 females aged 65+ are online

% ACCESSING THE INTERNET BY GENDER AND SOCIAL GRADE

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	92%	99%	99%	97%	94%	92%	75%
Males AB	98%	100%	99%	100%	100%	99%	93%
Males C1	95%	100%	100%	98%	96%	98%	75%
Males C2	90%	99%	100%	98%	94%	93%	65%
Males DE	82%	97%	97%	88%	84%	76%	55%
Females	88%	100%	99%	97%	95%	92%	60%
Females AB	95%	100%	100%	100%	99%	97%	83%
Females C1	91%	100%	100%	98%	98%	95%	65%
Females C2	89%	100%	100%	99%	93%	88%	57%
Females DE	78%	99%	97%	92%	87%	83%	39%

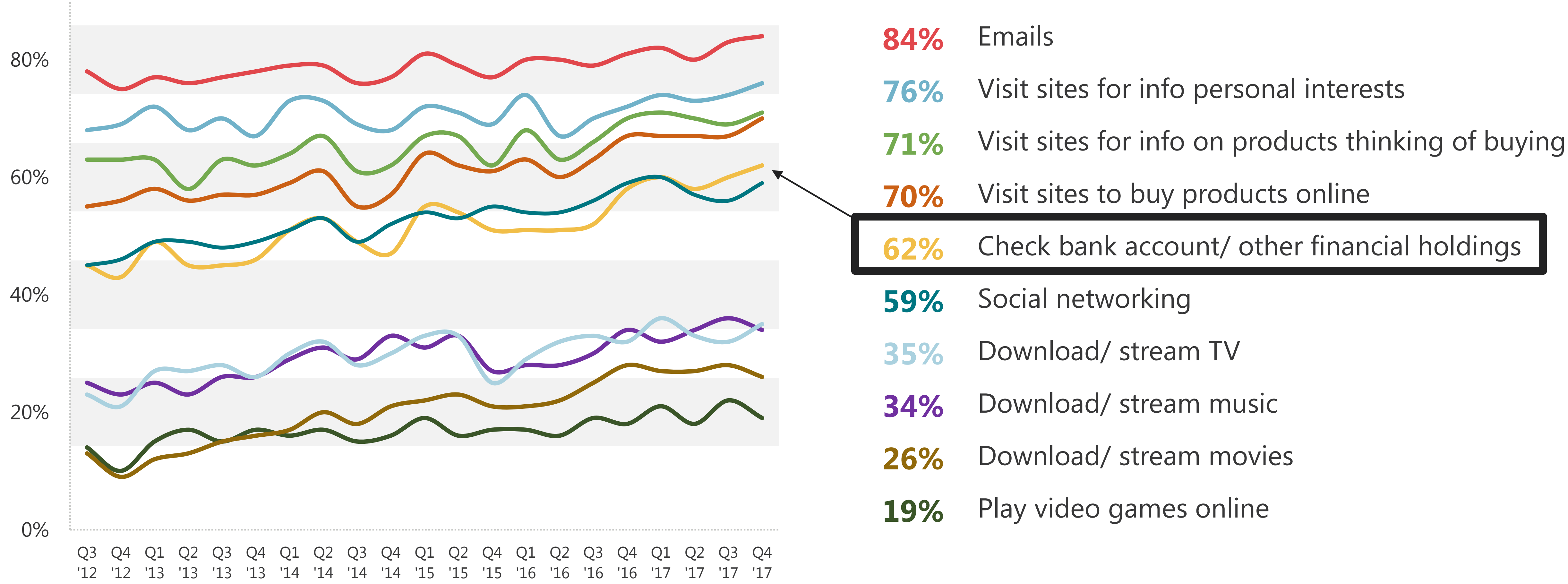
0-49%　50-79%　80-100%

Base: circa 4,000 GB adults aged 15+: Q1/ Q2/ Q3/ Q4 2017

Source: Ipsos MORI

Online banking continues to rise year-on-year, and there is an increase in browsing or purchasing products online vs. last year

% USE OF THE INTERNET IN THE PAST 3 MONTHS



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

CONNECTED HOME

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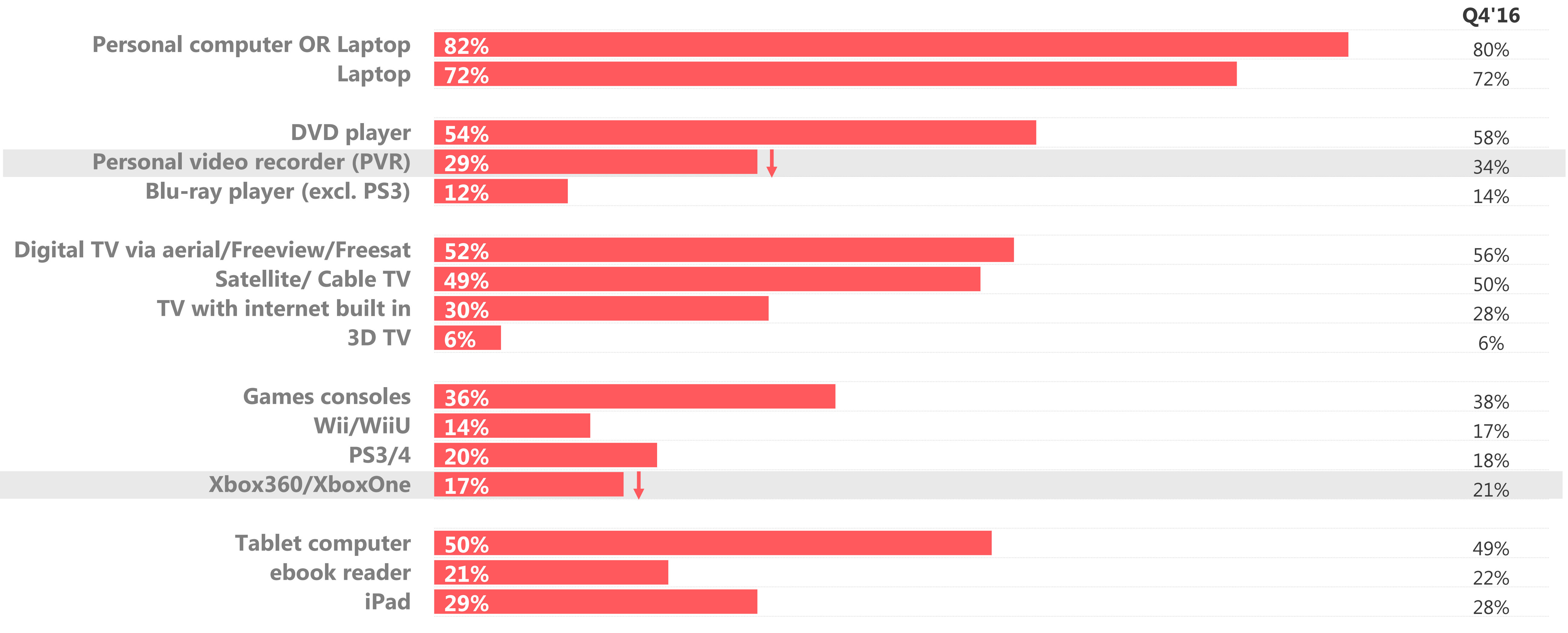
Ownership of most devices is in line with last year. The biggest decline is seen for PVR's, which are down by 5 percentage points

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



Base: circa 1,000 GB adults aged 15+: Quarter 4 2017

Source: Ipsos MORI

Sig. higher/lower than last year @ 95% CI

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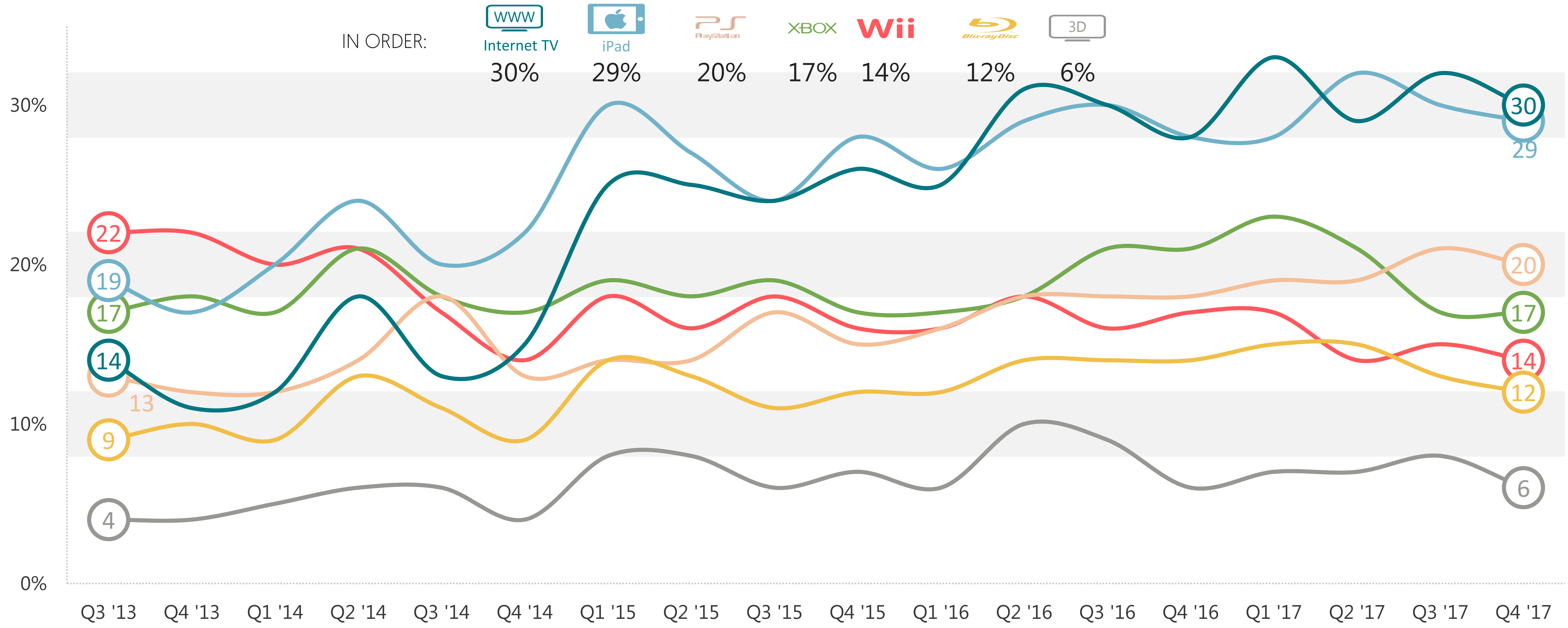
Similar declines are seen for Xbox, as PlayStation ends the year being GB's preferred console

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



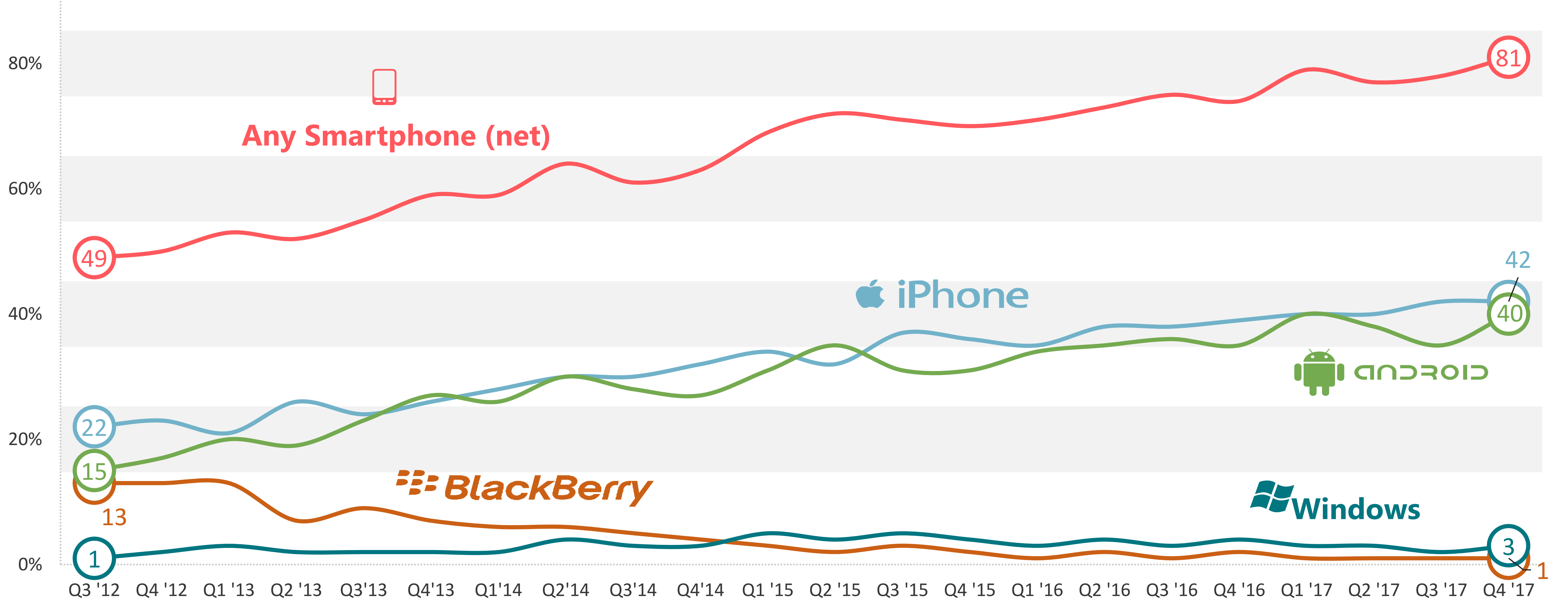
Base: circa 1,000 GB adults aged 15+ per wave

Source: Ipsos MORI

SMARTPHONE OWNERSHIP

Smartphone ownership continues to rise YoY, with 8 in 10 GB adults owning one. The fight for majority ownership continues between iPhone and Android

% OWN by MANUFACTURER



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

Source: Ipsos MORI

Ipsos Connect

Ownership is similar between genders across all ages, except for the 65+'s, where men are slightly more likely to be owners

% OWN A SMARTPHONE BY GENDER AND SOCIAL GRADE

	All%	15-24%	25-34%	35-44%	45-54%	55-64%	65+%
Males%	81%	97%	94%	93%	87%	78%	45%
Males AB%	86%	97%	97%	98%	97%	87%	59%
Males C1%	87%	99%	96%	96%	88%	90%	45%
Males C2%	77%	97%	100%	91%	80%	75%	34%
Males DE%	71%	96%	84%	82%	76%	57%	33%
Females%	77%	96%	94%	94%	85%	77%	37%
Females AB%	86%	94%	97%	97%	93%	92%	59%
Females C1%	78%	97%	92%	95%	88%	81%	37%
Females C2%	81%	96%	98%	94%	92%	83%	26%
Females DE%	64%	96%	92%	86%	65%	46%	23%

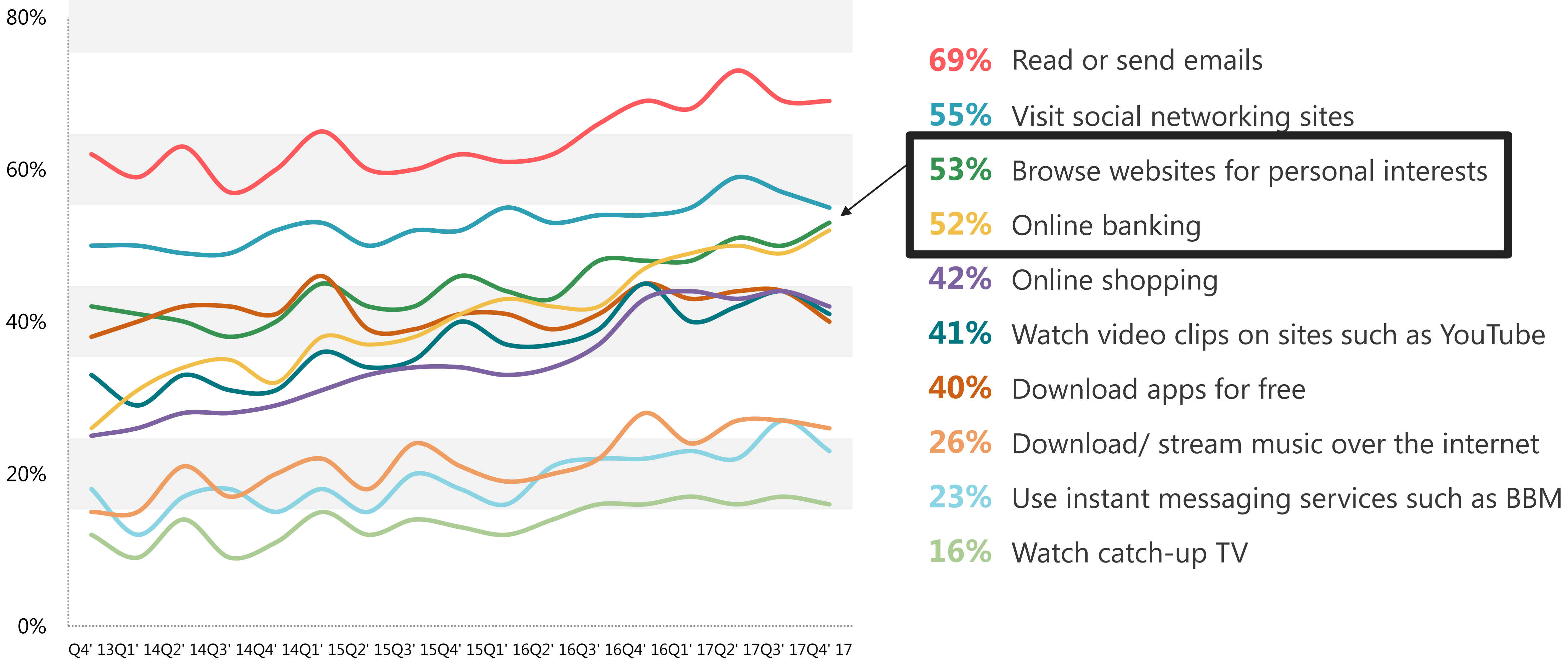
0-24% 25-49% 50-100%

Base: circa 4,000 GB adults aged 15+: Q1/ Q2/ Q3/ Q4 2017

Source: Ipsos MORI

Although emailing is the most popular activity, browsing websites and online banking see the largest YoY increases (+5%)

USE OF SMARTPHONE IN THE PAST 3 MONTHS



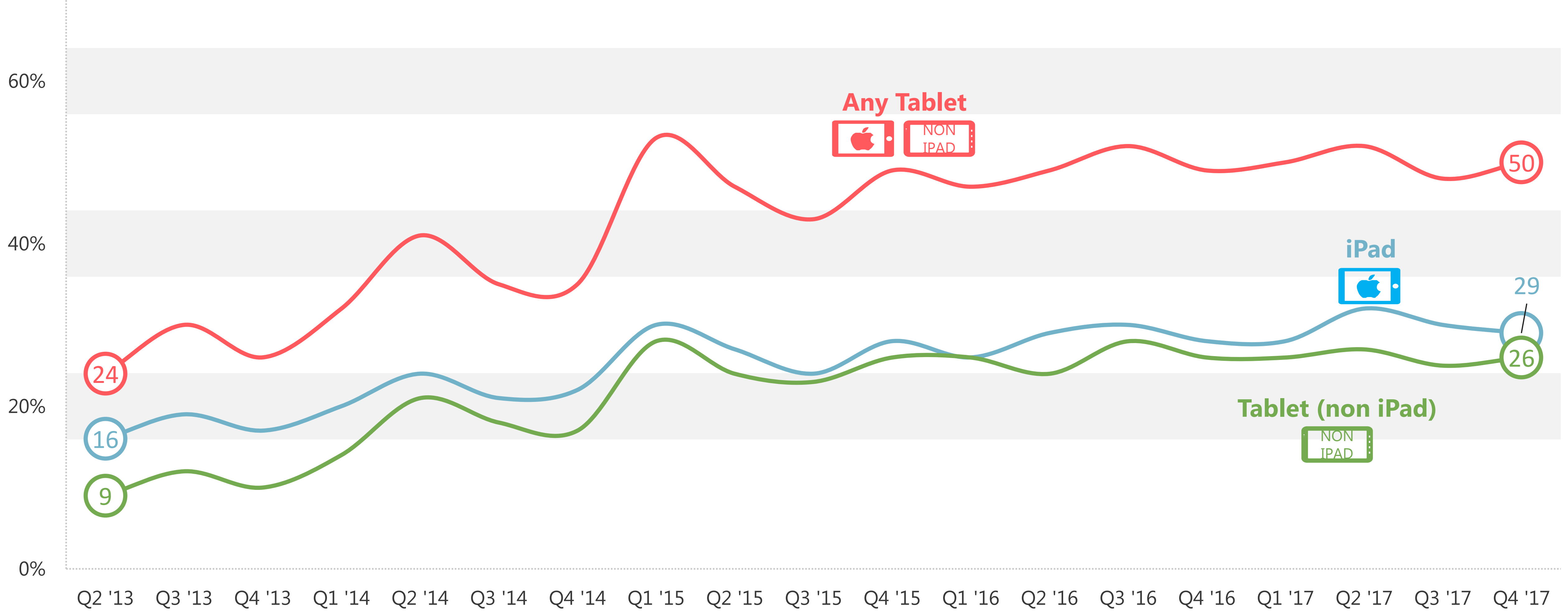
Base: circa 500-750 smartphone owners per wave

Source: Ipsos MORI

TABLET OWNERSHIP

Tablet ownership is steady versus this time last year, with half of GB adults owning one

% OWN A TABLET IN THE HOUSEHOLD



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

Source: Ipsos MORI

Tablet ownership continues to be highest among AB adults

% OWN A TABLET BY GENDER AND SOCIAL GRADE

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	49%	45%	44%	58%	55%	55%	41%
Males AB	65%	67%	55%	66%	74%	71%	58%
Males C1	52%	47%	48%	63%	54%	61%	41%
Males C2	43%	43%	38%	48%	49%	50%	35%
Males DE	33%	34%	33%	49%	35%	33%	21%
Females	51%	55%	51%	61%	59%	55%	34%
Females AB	64%	71%	53%	71%	73%	70%	48%
Females C1	51%	58%	53%	62%	63%	51%	32%
Females C2	54%	44%	58%	69%	58%	62%	36%
Females DE	36%	52%	42%	39%	37%	32%	24%

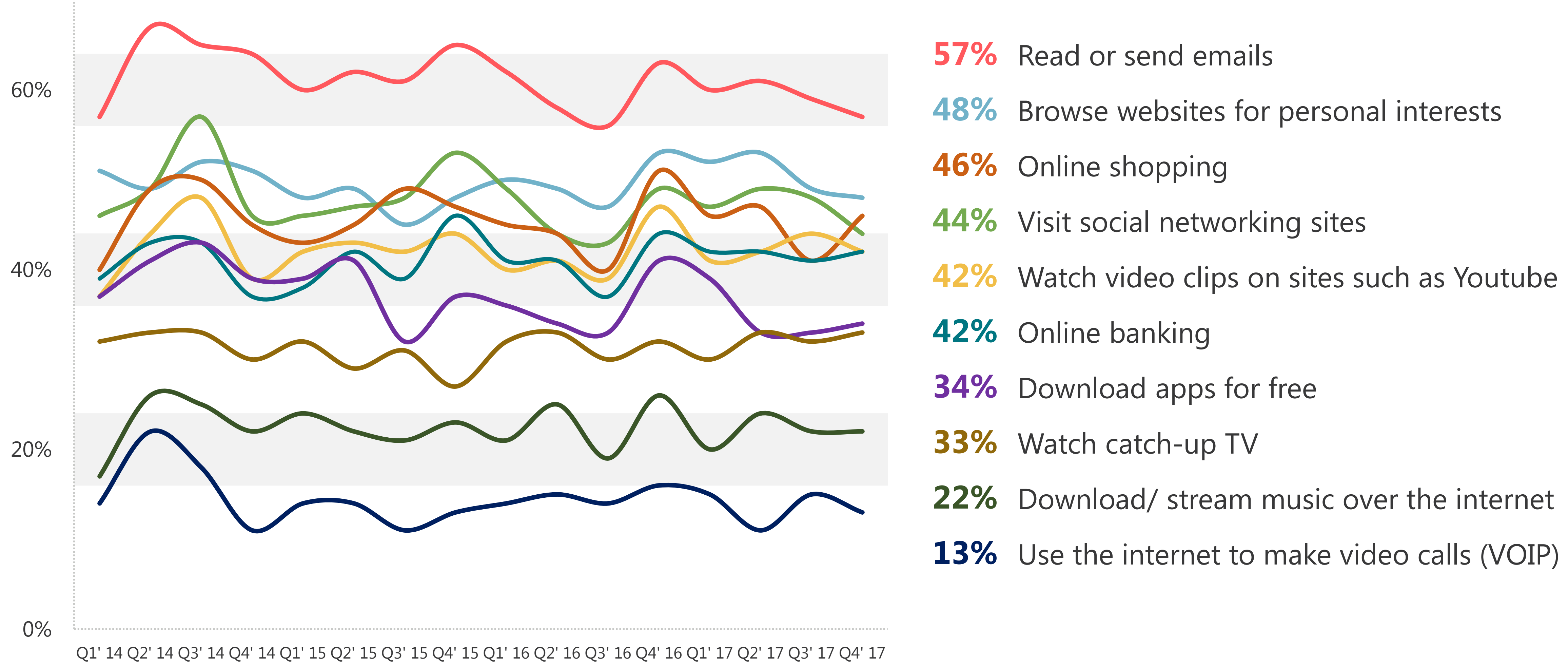
0-24% 25-49% 50-100%

Base: circa 4,000 GB adults aged 15+: Q1/ Q2/ Q3/ Q4 2017

Source: Ipsos MORI

Although ownership has steadied, fewer people appear to be using their tablets for all activities vs. this time last year

USE OF TABLET IN THE PAST 3 MONTHS



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

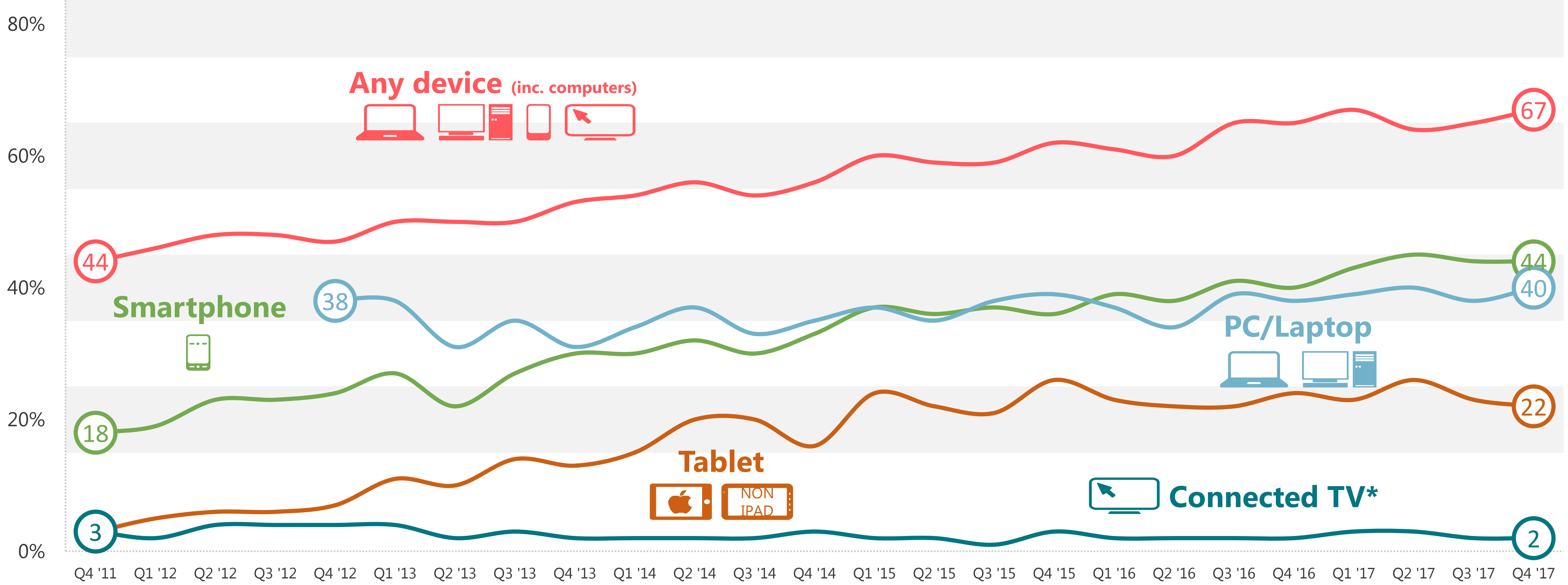
Source: Ipsos MORI

SOCIAL NETWORKING

The smartphone continues to be the main device used to access social media. The 4% YoY rise is in line with increased smartphone ownership

% VISITING SOCIAL NETWORKING SITES

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

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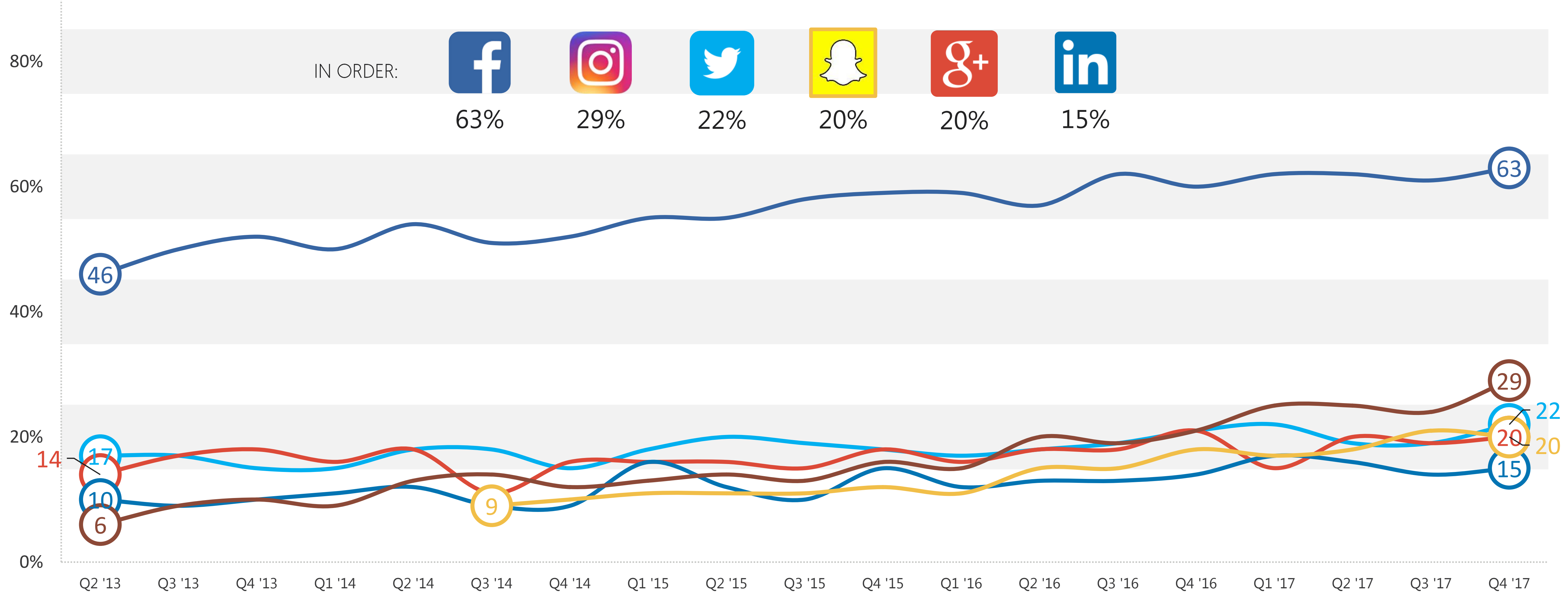
Usage of all social media sites is up vs. Q4 '16, but none more so than Instagram (+8% points among GB adults)

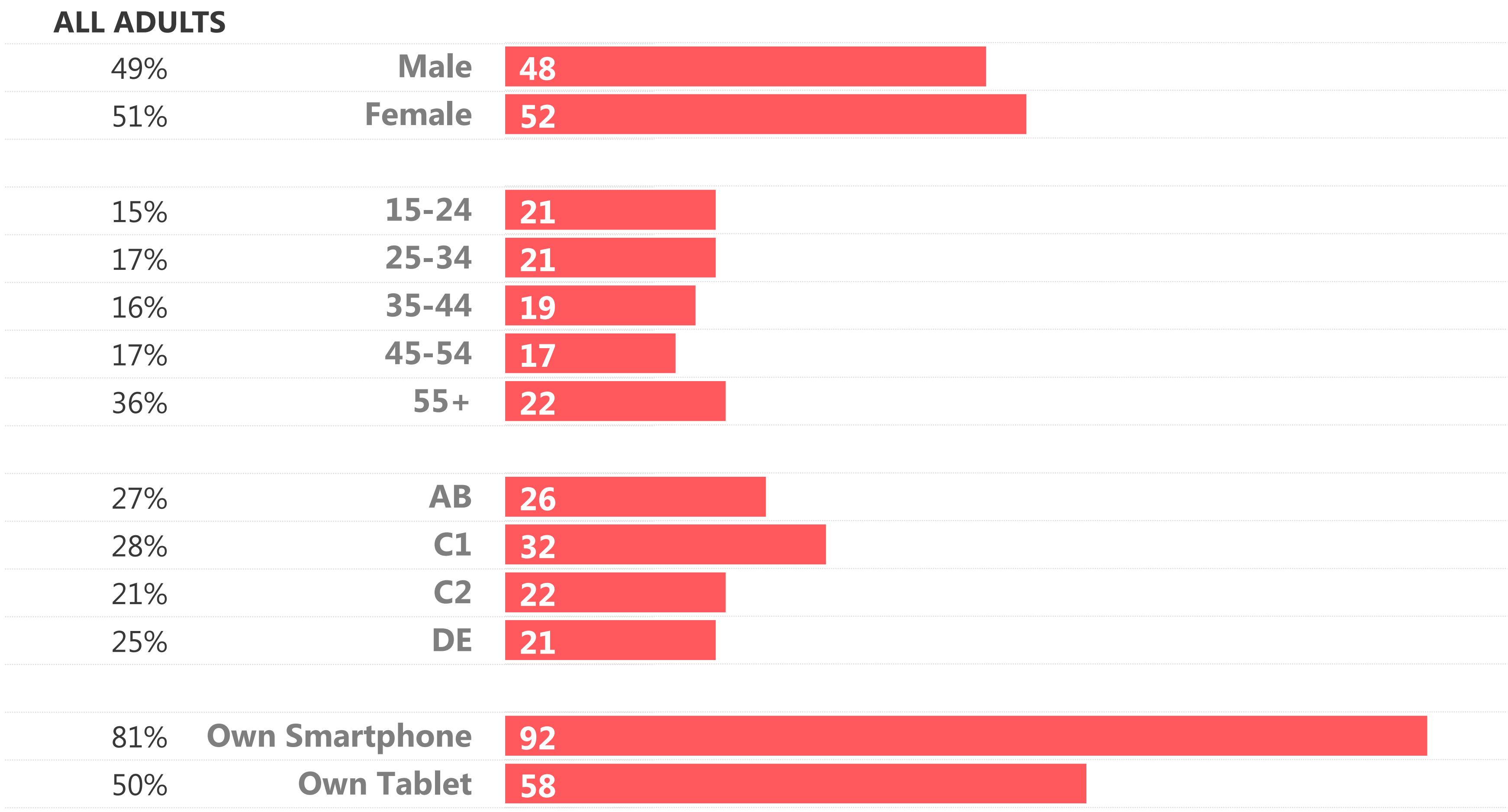
% VISITED IN LAST 3 MONTHS



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

Source: Ipsos MORI

Because of its popularity, the profile of Facebook users has a closer match to the wider GB adult online population than any other site



The profile of Facebook users continues to be evenly spread over 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 in comparison to the GB adult population with 9 in 10 owning a smartphone and almost 3 in 5 owning a tablet.

Base: circa GB adults (1,000) / All visiting / using Facebook in last 3 months (586) Q4 2017

Source: Ipsos MORI

The number of GB adults aged 65+ using Facebook (1 in 4) is greater than its competitors (less than 1 in 10 for all others)

% 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	60%	86%	79%	68%	59%	46%	26%
Males AB	59%	90%	77%	73%	65%	47%	32%
Males C1	69%	90%	86%	66%	70%	59%	27%
Males C2	58%	87%	79%	78%	46%	47%	20%
Males DE	52%	79%	71%	50%	52%	33%	23%
Females	65%	87%	85%	81%	68%	61%	27%
Females AB	66%	87%	93%	86%	70%	64%	29%
Females C1	69%	91%	87%	81%	71%	63%	35%
Females C2	67%	83%	83%	88%	70%	60%	23%
Females DE	57%	84%	82%	68%	59%	57%	19%

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

Base: circa 4,000 GB adults aged 15+: Q1/ Q2/ Q3/ Q4 2017

Source: Ipsos MORI

The profile of Twitter users is slightly skewed towards males and particularly ABC1 social demographic groups

ALL ADULTS		Twitter users
49%	Male	53
51%	Female	47
15%	15-24	29
17%	25-34	22
16%	35-44	20
17%	45-54	14
36%	55+	15
27%	AB	33
28%	C1	35
21%	C2	19
25%	DE	13
81%	Own Smartphone	97
50%	Own Tablet	63

Around half of Twitter users are young males and aged 15-34.

As the preferred mode of access, it is not surprising to see near universal Smartphone ownership.

Base: circa GB adults (1,000) / All visiting / using Twitter in last 3 months (202) Q4 2017

Source: Ipsos MORI

Younger AB males are more likely to use Twitter than anyone else

% 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	23%	39%	33%	30%	18%	15%	5%
Males AB	29%	60%	39%	51%	24%	22%	9%
Males C1	30%	42%	45%	32%	27%	18%	6%
Males C2	16%	30%	22%	25%	9%	14%	2%
Males DE	13%	33%	21%	3%	5%	5%	3%
Females	18%	39%	18%	23%	22%	11%	4%
Females AB	25%	44%	42%	29%	33%	19%	4%
Females C1	22%	50%	22%	23%	19%	15%	5%
Females C2	14%	31%	11%	21%	18%	0%	3%
Females DE	11%	27%	9%	15%	14%	3%	4%

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

Base: circa 4,000 GB adults aged 15+: Q1/ Q2/ Q3/ Q4 2017

Source: Ipsos MORI

Ipsos Connect

Almost half of LinkedIn's users are AB, which is higher than all other social media sites

ALL ADULTS		
49%	Male	55
51%	Female	45
15%	15-24	17
17%	25-34	24
16%	35-44	22
17%	45-54	19
36%	55+	18
27%	AB	49
28%	C1	33
21%	C2	9
25%	DE	9
81%	Own Smartphone	99
50%	Own Tablet	67

LinkedIn continues to have the lowest usage amongst 15-24 year olds.

LinkedIn users considerably over index on smartphone and tablet ownership.

Base: circa GB adults (1,000) / All visiting / using Linkedin in last 3 months (138) Q4 2017

Source: Ipsos MORI

Usage is highest among AB males aged 25-44

% 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	19%	17%	26%	26%	23%	16%	6%
Males AB	33%	36%	51%	49%	38%	31%	11%
Males C1	27%	25%	38%	32%	33%	20%	7%
Males C2	6%	9%	6%	6%	9%	7%	3%
Males DE	3%	6%	2%	6%	0%	1%	1%
Females	13%	15%	17%	21%	15%	12%	2%
Females AB	23%	28%	48%	31%	27%	21%	5%
Females C1	15%	19%	22%	25%	21%	11%	1%
Females C2	5%	5%	4%	12%	4%	9%	1%
Females DE	5%	12%	8%	6%	3%	1%	0%

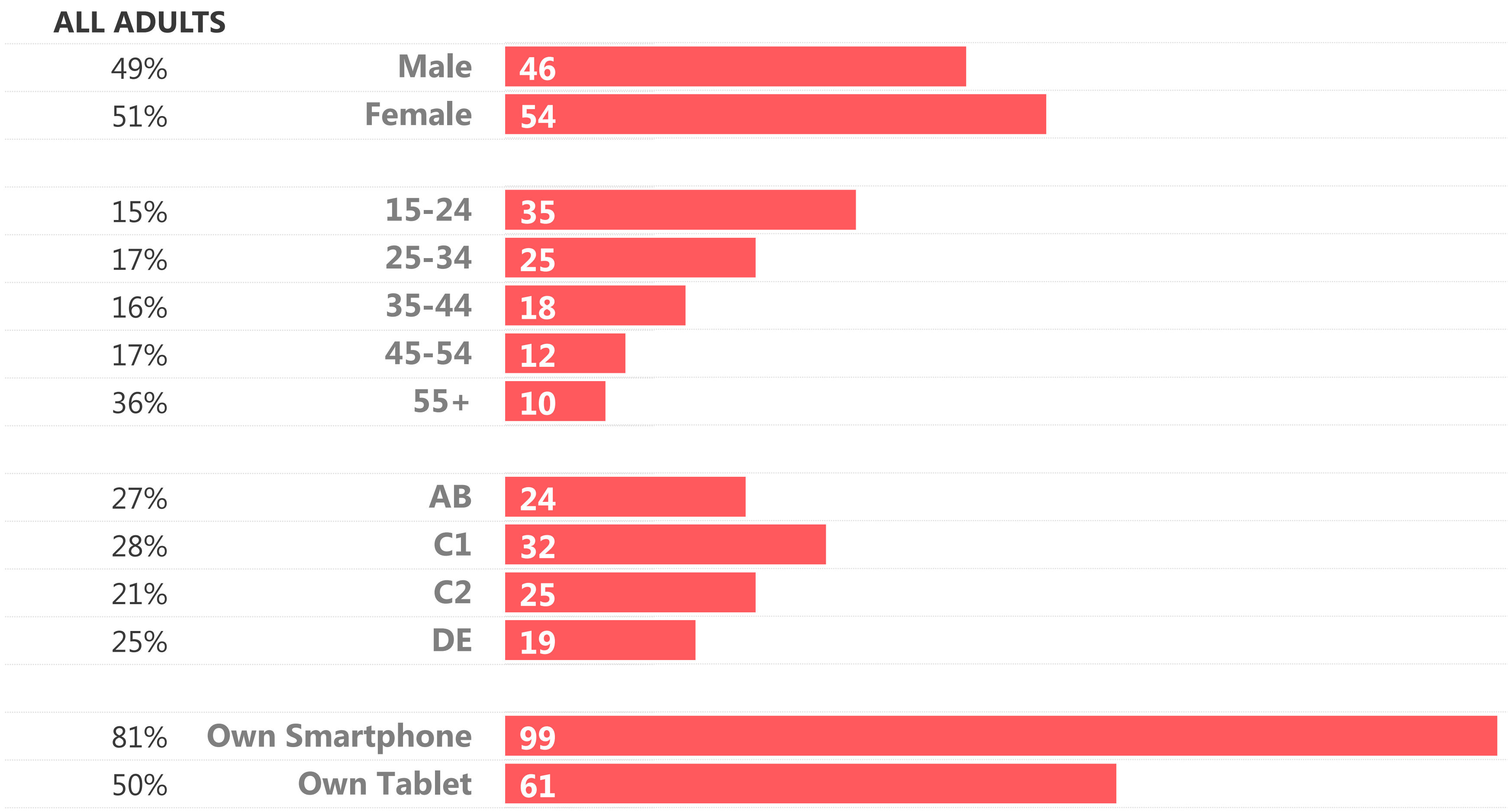
0-24% 25-49% 50-100%

Base: circa 4,000 GB adults aged 15+: Q1/ Q2/ Q3/ Q4 2017

Source: Ipsos MORI

Ipsos Connect

More than 1 in 3 of Instagram's users are aged 15-24 there is also a small skew in favour of female users



3 in 5 Instagram users are 15-34 years old, and skew towards being ABC1 social grade.

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 (255) Q4 2017

Source: Ipsos MORI

ABC1 females aged 15-24 are more likely to be Instagram users than any other demographic

% 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	24%	58%	40%	26%	15%	6%	2%
Males AB	21%	69%	42%	30%	17%	8%	2%
Males C1	30%	63%	42%	21%	23%	8%	3%
Males C2	26%	51%	44%	40%	15%	7%	2%
Males DE	18%	52%	33%	11%	2%	0%	0%
Females	28%	68%	43%	35%	22%	11%	3%
Females AB	30%	74%	67%	39%	25%	19%	5%
Females C1	31%	72%	45%	35%	24%	12%	1%
Females C2	25%	57%	29%	41%	18%	4%	3%
Females DE	25%	67%	39%	22%	20%	2%	3%

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

Base: circa 4,000 GB adults aged 15+: Q1/ Q2/ Q3/ Q4 2017

Source: Ipsos MORI

Snapchat has the youngest profile of users among all social media sites, over half are aged 15-24

	ALL ADULTS	
Male	49%	47
Female	51%	53
15-24	15%	52
25-34	17%	24
35-44	16%	17
45-54	17%	4
55+	36%	3
AB	27%	15
C1	28%	36
C2	21%	20
DE	25%	28
Own Smartphone	81%	100
Own Tablet	50%	57

Over half of all Snapchat users are aged 15-24. Instagram is the second youngest site, with 1 in 3 users being in this age group.

Base: circa GB adults (1,000) / All visiting / using Snapchat in last 3 months (181) Q4 2017

Source: Ipsos MORI

Over 2/3rds of 15-24 y.o. females use Snapchat however usage is practically non-existent among females and males aged 55+

% 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	17%	62%	22%	13%	6%	2%	1%
Males AB	13%	79%	20%	11%	10%	2%	1%
Males C1	23%	72%	25%	12%	4%	3%	1%
Males C2	14%	42%	15%	21%	6%	2%	1%
Males DE	18%	59%	28%	9%	3%	3%	0%
Females	21%	69%	34%	22%	10%	3%	0%
Females AB	13%	47%	26%	20%	11%	3%	0%
Females C1	25%	74%	37%	21%	12%	2%	1%
Females C2	24%	75%	28%	26%	12%	0%	0%
Females DE	22%	69%	38%	23%	5%	4%	1%

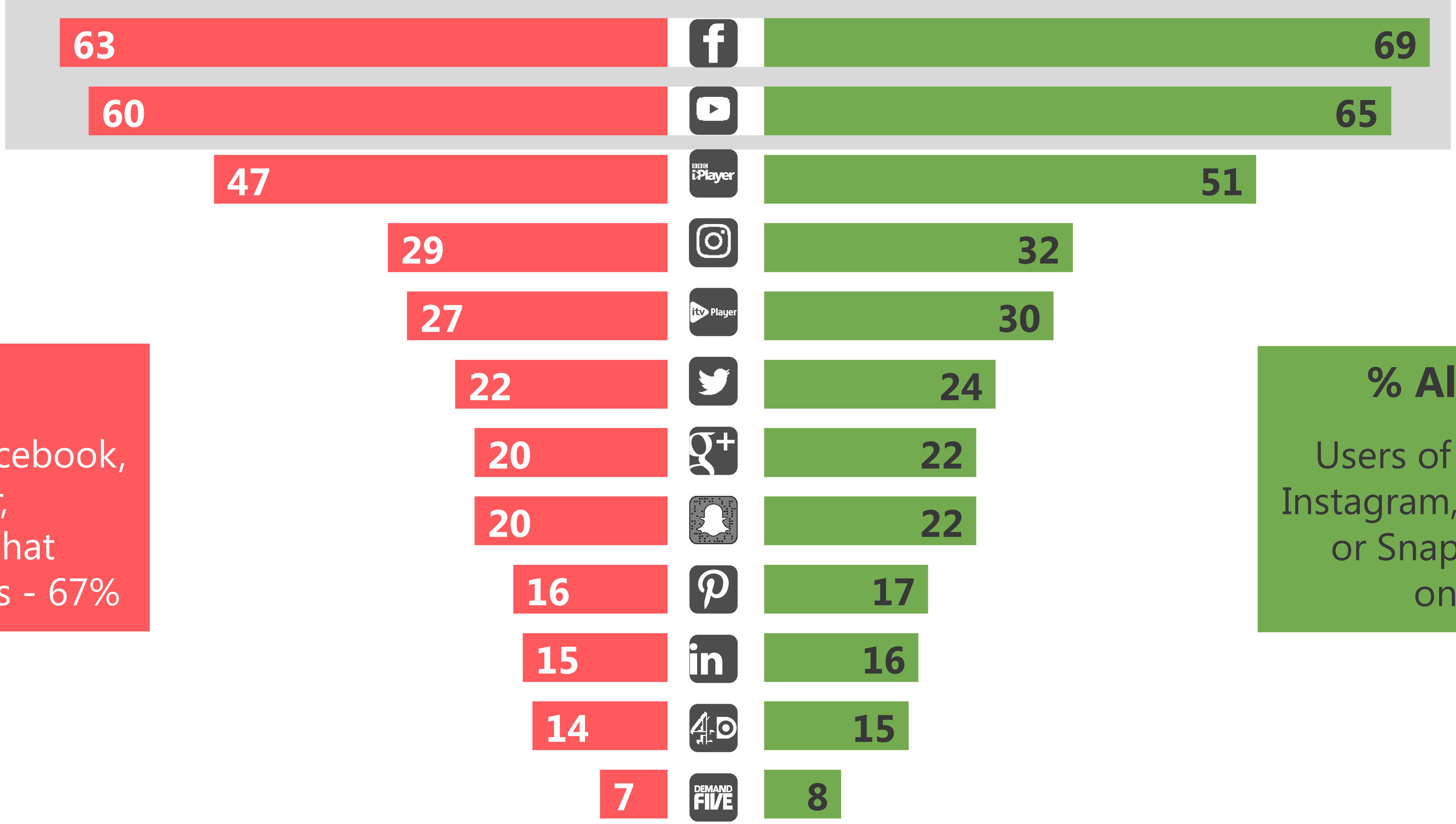
0-24% | 25-49% | 50-100%

Base: circa 4,000 GB adults aged 15+: Q1/ Q2/ Q3/ Q4 2017

Source: Ipsos MORI

Facebook and YouTube are the main platforms for online content consumption

% 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 - 73%

Base: circa GB adults 1,000 adults aged 15+: Q4 2017

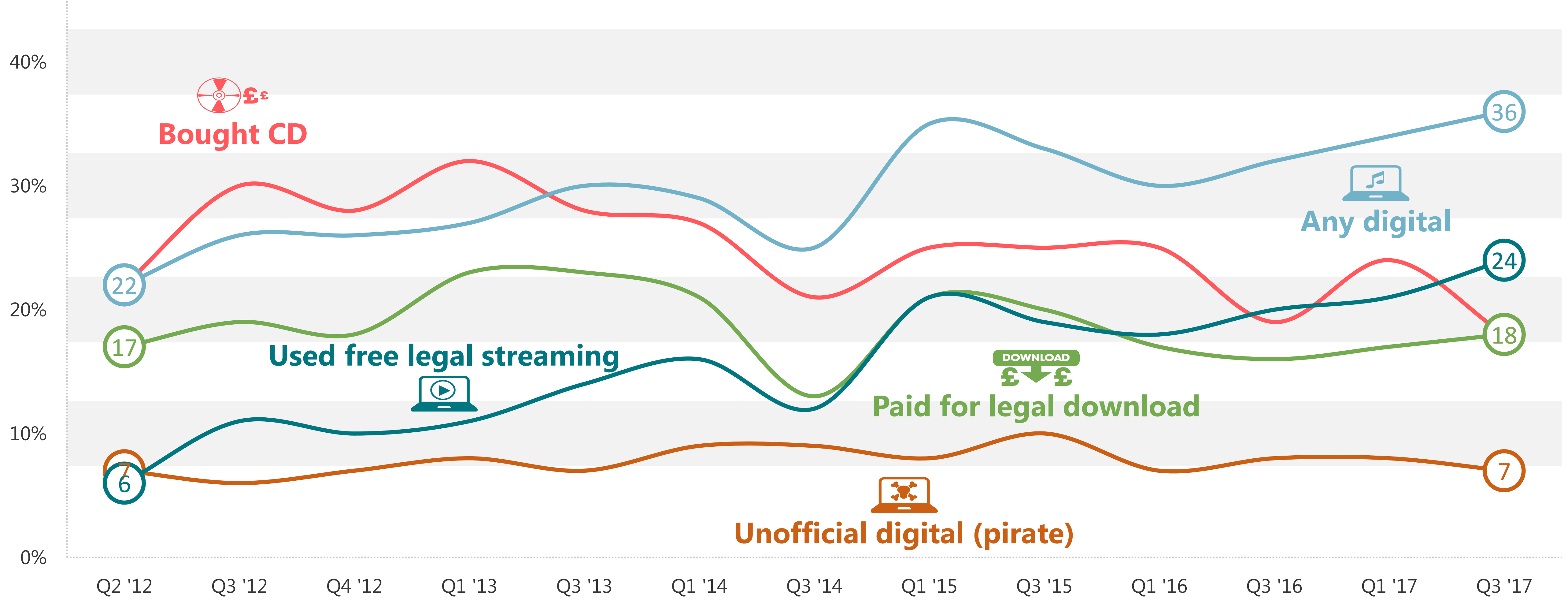
Base: 869 GB online adults aged 15+: Q4 2017

Source: Ipsos MORI

Content CONSUMPTION
Music / GAMES / TV / MOVIES

The rise in digital music consumption gives no indication of slowing

MUSIC CONSUMPTION

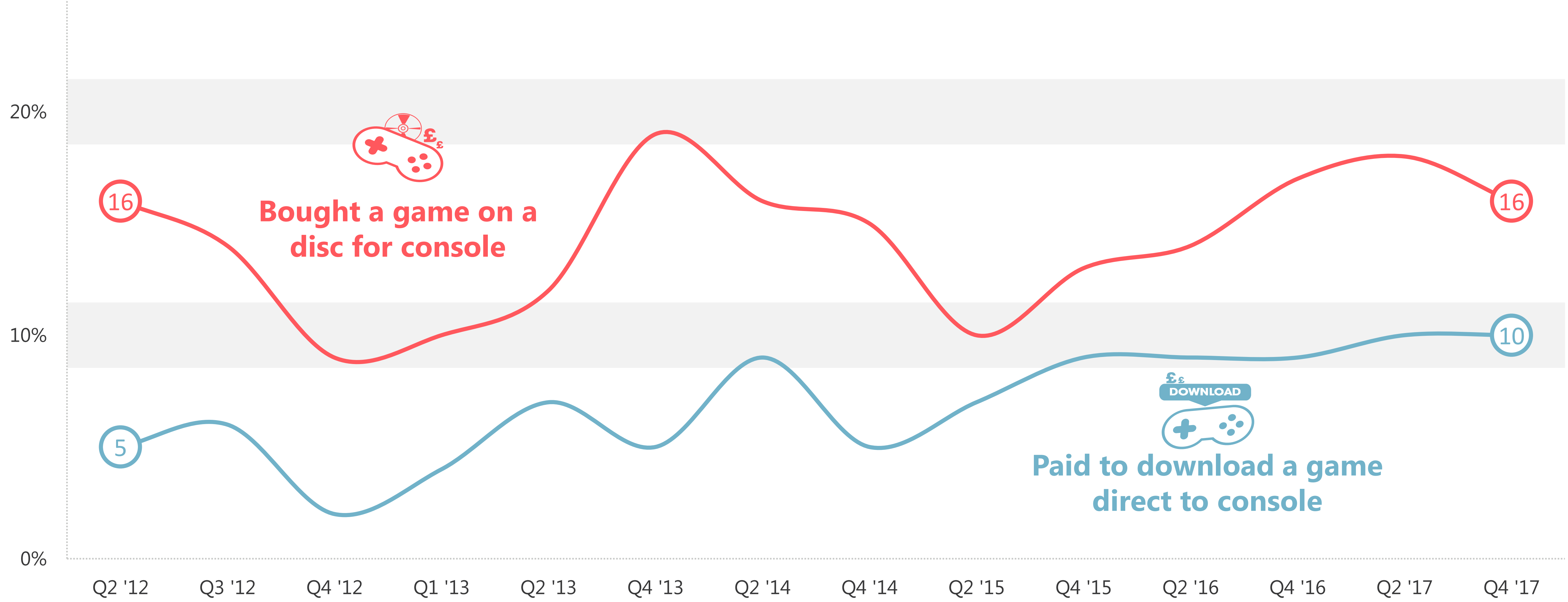


Base: circa 1,000 GB adults aged 15+ per wave / Music consumption is tracked every 6 months

Source: Ipsos MORI

The dominance of physical games over digital is somewhat surprising given the digital prominence in other activities. People may prefer physical copies of games as they can be seen as part of a wider collection and can be traded in for other physical copies

GAMES CONSUMPTION

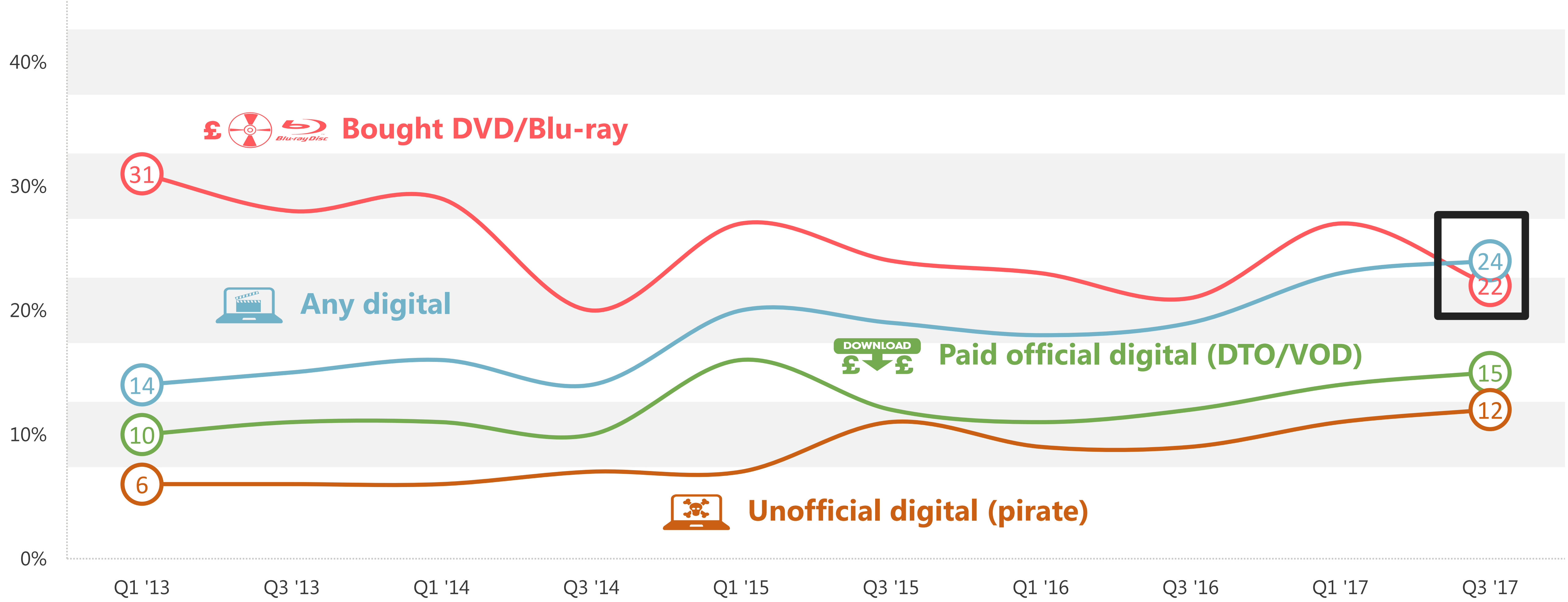


Base: circa 1,000 GB adults aged 15+ per wave / Games consumption is tracked every 6 months

Source: Ipsos MORI

Digital movie consumption overtakes DVD/Blu-ray for the first time

MOVIE CONSUMPTION



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

Source: Ipsos MORI

TECH TRACKER TECHNICAL DETAILS

- Ipsos MORI interviewed a quota sample of **1000 adults aged 15+ in GB**.
- The latest interviews were carried out face to face **3rd November – 13th November 2017**.
- 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.

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.

Ipsos Connect is a global specialised business to co-ordinate Ipsos services in the domains of brand communications, advertising and media.

As the world of brand communications, advertising and media become increasingly complex, fragmented and digitalised, Ipsos is helping clients better embrace this modern complexity with investment in new approaches and products that will fit with the digital age.

Ipsos Connect aims to be the preferred global partner for companies to measure and amplify how media, brands and consumers connect through compelling content, great communication and relevant media planning.

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