Technology Tracker

TECH TRACKER

QUARTERLY RELEASE:

Q2 2016

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 2 2016 (Field in May)

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
- The selfie generation

HEADLINES

Internet usage

Almost 90% of GB adults claim that they have accessed the internet. The proportion of adults using mobile phones to do this has been increasing steadily and is at 68% in Q2'16.

The top online activities remain: accessing email (80%), browsing for information on personal interest (67%), researching products and services (63%) and online shopping (60%).

Connected home

Ownership of 3D TVs nearly doubled wave on wave and is now at 10%. Nearly 1 in 2 households also own a tablet and over half of these households have an iPad.

Nearly 2 in 5 of GB adults have at least one gaming console in their household which is up from 1 in 3 in the previous quarter. Ownership of consoles between brands is equal, with ownership of Wii/WiiU, PS3/4 and Xbox360/XboxOne at 18%.

Social networking

Accessing social networking platforms via smartphones and PC/laptops is head to head (38% vs. 34%).

With a more mainstream appeal (broadly equal spread with regards to age of users), Facebook remains the most visited social networking site (57% in Q2'16) Instagram (20%), Twitter (18%), G+(18%) and Snapchat (15%).

Smartphones

Smartphone ownership is now at 73%. iOS(38%) and Android(35%) penetration remain neck and neck.

Top 3 activities on smartphones: reading or sending emails (62%), visiting social networking sites (53%) and browsing websites (43%) .

Tablets

Ownership of tablets remains stable - 49% in Q2'16 vs. 47% in Q2'15. The gap between ownership of iPads and non-iPad tablets has widened slightly (29% vs. 24%).

Top activities on tablet: reading or sending emails (58%), browsing websites (49%), visiting social networking sites (44%) and online shopping (44%).

Content consumption

Ownership of package games(14%) continues its slow recovery from last years dip in consumption (10%), while paying to download a game is just under the 10% mark (9%).

There is a steady upward trend in consumption of TV series specifically through catch –up TV (36%) and any digital consumption (26%).

Selfie generation

Taking selfies is more prevalent among the younger generations (15-34; 40%). Sharing 'selfies' with peers and through social media is the most prevalent activity especially amongst females and 15-34s.

Facebook(68%) followed by Whatsapp(42%) are the most used platforms for sharing selfies. However, with 15-24 year olds Snapchat and Instagram are also popular (49% and 40% respectively).

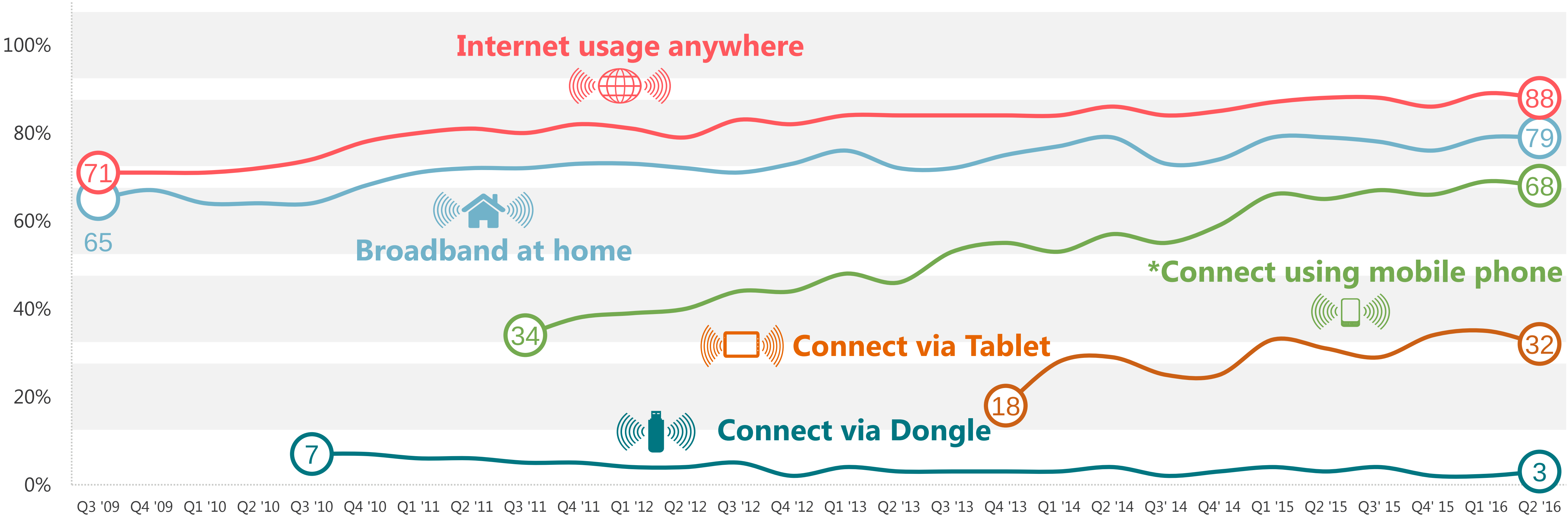
INTERNET USAGE

HOW, WHEN, WHERE

Ipsos Connect

Increasing use of mobile to access internet

% 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

Internet access is almost universal for 15-34s

% ACCESSING THE INTERNET BY GENDER AND SOCIAL GRADE

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	89%	100%	99%	95%	89%	87%	69%
Males AB	97%	100%	100%	98%	97%	99%	93%
Males C1	95%	100%	100%	99%	98%	93%	76%
Males C2	86%	100%	98%	94%	89%	81%	57%
Males DE	76%	99%	95%	87%	69%	70%	37%
Females	86%	98%	99%	96%	95%	83%	57%
Females AB	95%	100%	100%	99%	98%	97%	82%
Females C1	92%	100%	100%	100%	99%	94%	68%
Females C2	85%	98%	96%	98%	95%	81%	52%
Females DE	72%	96%	98%	86%	85%	62%	31%

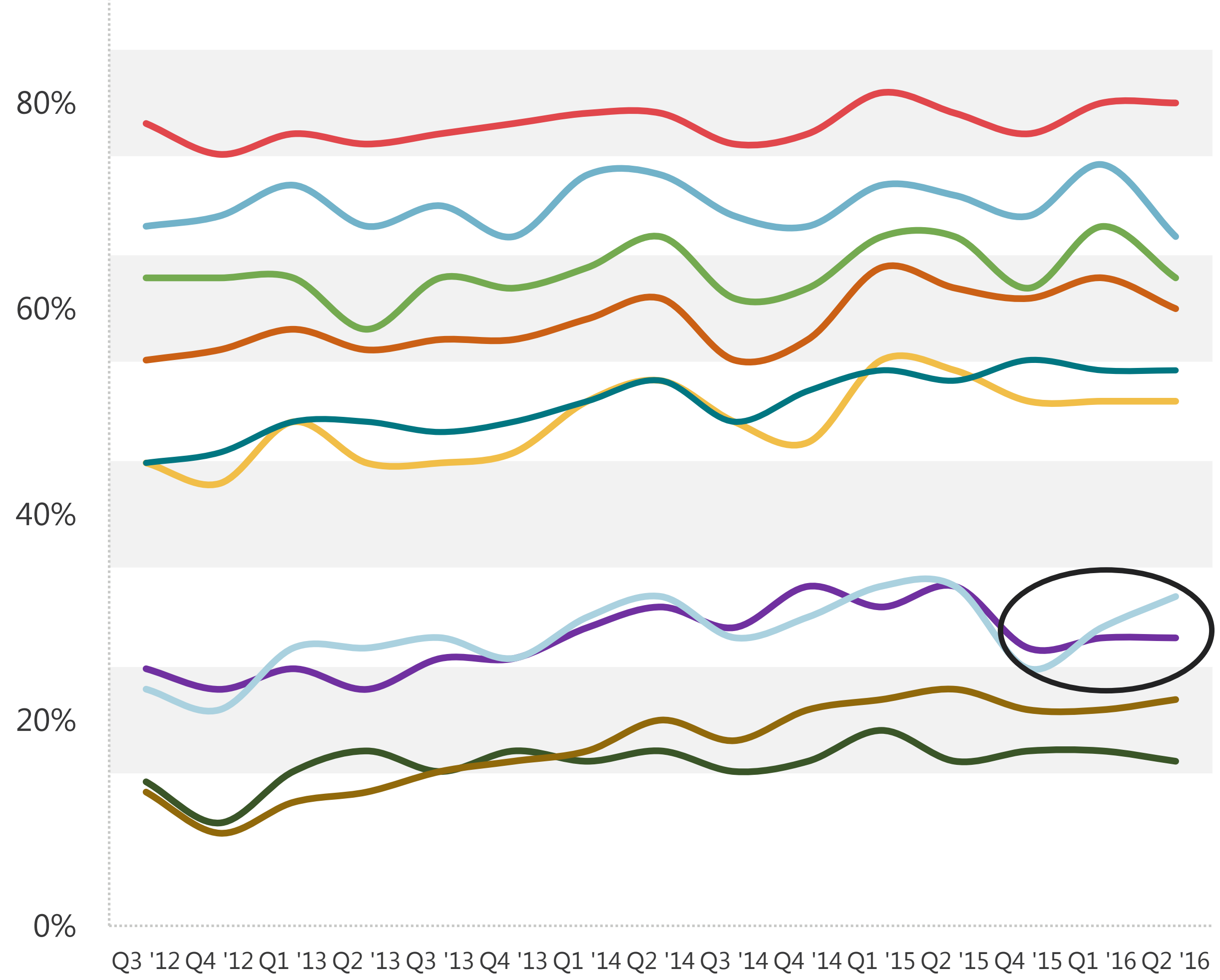
0-49% 50-79% 80-100%

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

Source: Ipsos MORI

Rise in downloading/streaming TV

% USE OF THE INTERNET IN THE PAST 3 MONTHS



80% Emails
67% Visit sites for info on personal interests
63% Visit sites for info on products thinking of buying
60% Visit sites to buy products online
54% Social networking
51% Check bank account/ other financial holdings
32% Download/ stream TV
28% Download/ stream music
22% Download/ stream movies
16% 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

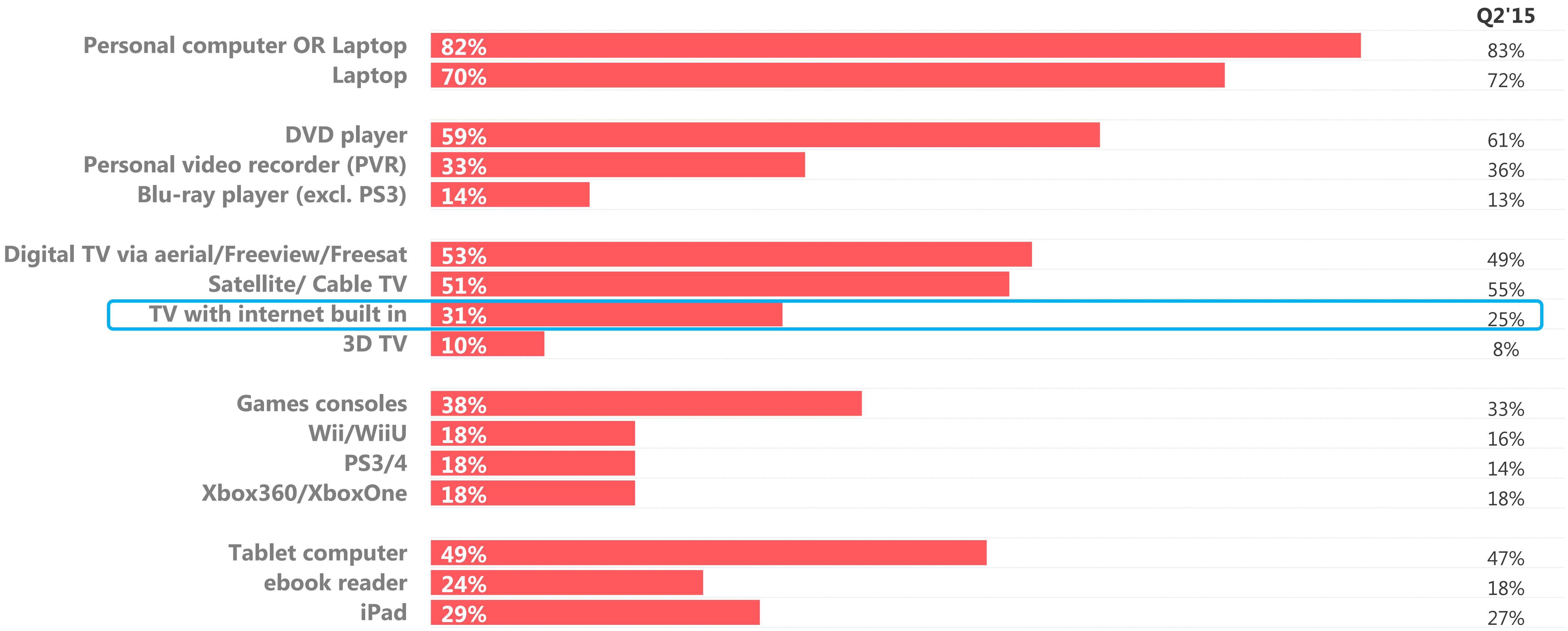
Source: Ipsos MORI

CONNECTED HOME

Ipsos Connect

Ownership of smart TV’s has increased

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

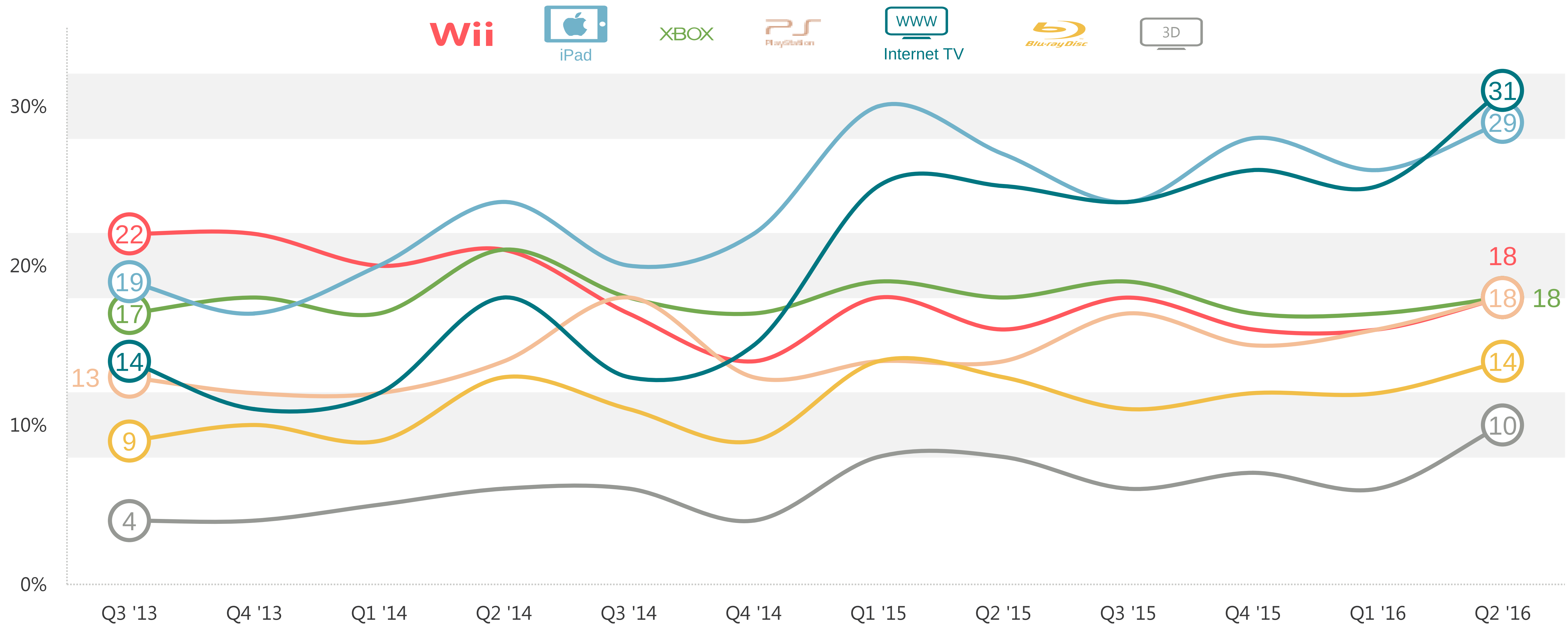


Base: circa 1,000 GB adults aged 15+: Quarter 2 2016

Source: Ipsos MORI

1 in 3 households now have a Smart TV

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



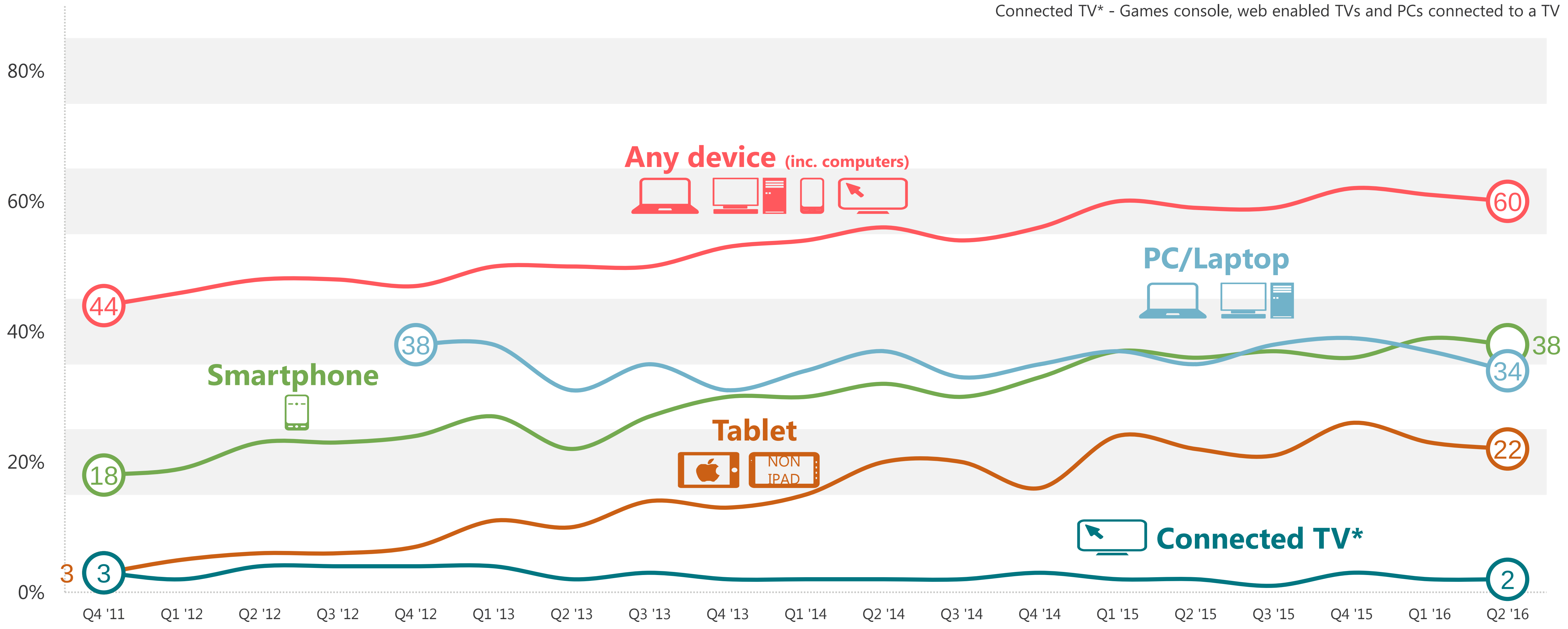
Base: circa 1,000 GB adults aged 15+ per wave

Source: Ipsos MORI

SOCIAL NETWORKING

Smartphone has overtaken PC as most used device

% VISITING SOCIAL NETWORKING SITES

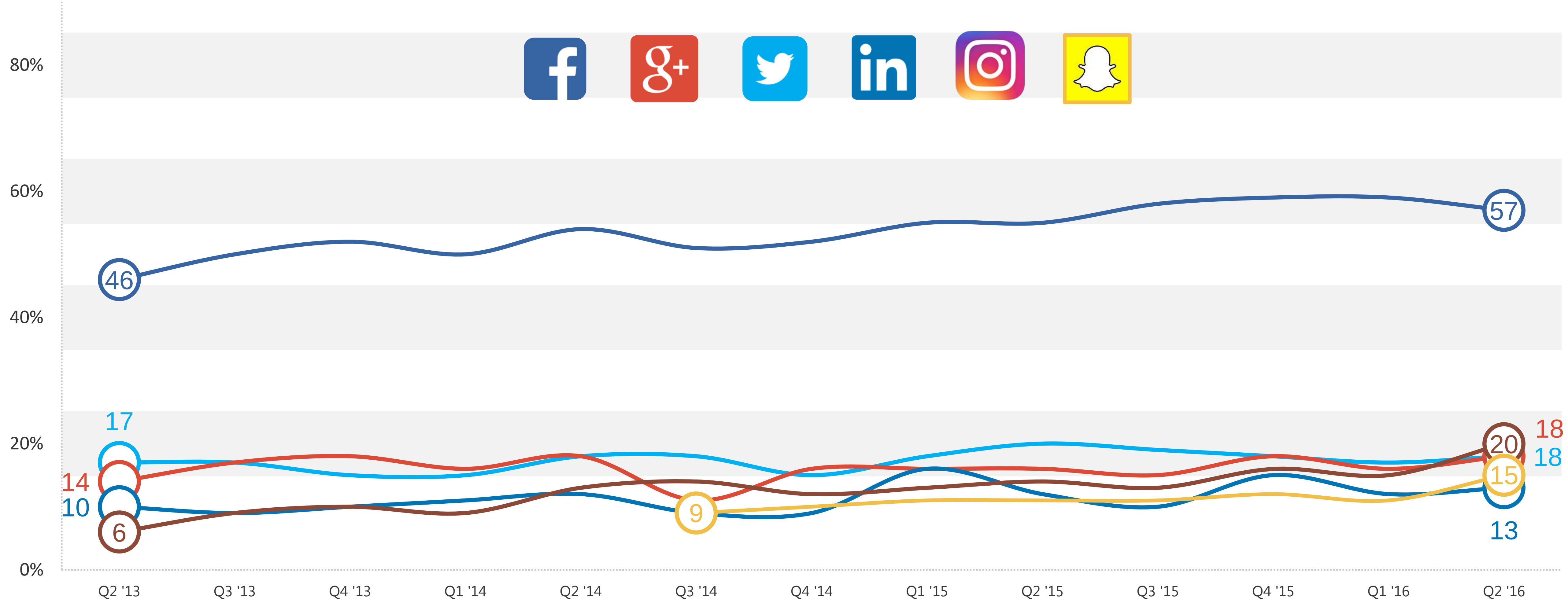


Base: circa 1,000 GB adults aged 15+ per wave

Source: Ipsos MORI

Facebook continues to dominate

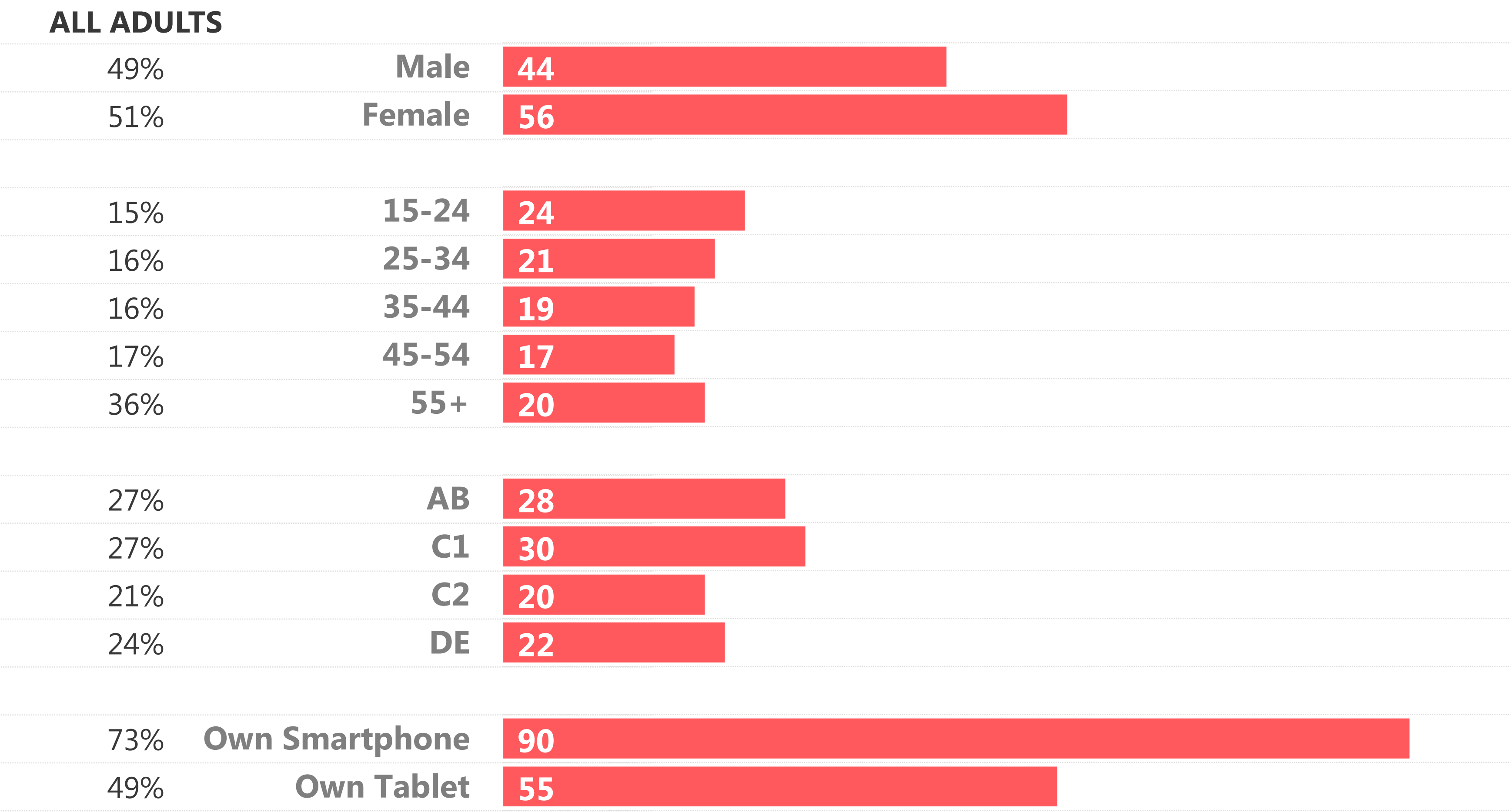
% VISITED IN LAST 3 MONTHS



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

Source: Ipsos MORI

Facebook users more evenly spread across age groups



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 in 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 (543) Q2 2016

Source: Ipsos MORI

Higher usage of Facebook among 25-54 year females

% 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	56%	88%	74%	65%	48%	41%	25%
Males AB	59%	92%	84%	70%	50%	54%	34%
Males C1	62%	89%	71%	71%	60%	43%	29%
Males C2	54%	86%	74%	60%	50%	42%	14%
Males DE	47%	86%	65%	53%	31%	22%	18%
Females	60%	88%	83%	76%	62%	47%	22%
Females AB	64%	83%	89%	81%	66%	55%	30%
Females C1	64%	91%	80%	80%	65%	52%	26%
Females C2	61%	90%	82%	79%	53%	40%	22%
Females DE	53%	86%	81%	62%	60%	39%	12%

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

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

Source: Ipsos MORI

Proportion of Google+ users aged 15-24 is on par with 55+

ALL ADULTS		
49%	Male	47
51%	Female	53
15%	15-24	22
16%	25-34	15
16%	35-44	21
17%	45-54	20
36%	55+	22
27%	AB	27
27%	C1	32
21%	C2	19
24%	DE	22
73%	Own Smartphone	89
49%	Own Tablet	57

Both smartphone and tablet ownership continues to be higher than the GB population. (89% for smartphones and 57% for tablets).

Base: circa GB adults (1,000) / All visiting / using Google+ in last 3 months (179) Q2 2016

Source: Ipsos MORI

Less than 1 in 5 use Google+

% 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	16%	27%	20%	20%	12%	15%	6%
Males AB	17%	24%	21%	25%	13%	19%	7%
Males C1	18%	26%	22%	19%	14%	14%	14%
Males C2	14%	24%	19%	17%	5%	18%	2%
Males DE	16%	31%	18%	19%	16%	9%	2%
Females	18%	26%	21%	21%	23%	15%	5%
Females AB	17%	18%	26%	19%	22%	14%	6%
Females C1	17%	27%	15%	24%	18%	18%	6%
Females C2	17%	25%	16%	20%	23%	17%	5%
Females DE	19%	28%	27%	22%	31%	13%	4%

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

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

Source: Ipsos MORI

Twitter users are more likely to be male than female

ALL ADULTS		Twitter users
49%	Male	57
51%	Female	43
15%	15-24	33
16%	25-34	20
16%	35-44	19
17%	45-54	16
36%	55+	11
27%	AB	39
27%	C1	28
21%	C2	14
24%	DE	18
73%	Own Smartphone	94
49%	Own Tablet	66

Over 2/3s of Twitter users are ABC1s.

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 (160) Q2 2016

Source: Ipsos MORI

Twitter most popular among young 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%	29%	18%	9%	5%
Males AB	29%	51%	53%	42%	31%	15%	6%
Males C1	23%	38%	23%	34%	19%	11%	6%
Males C2	16%	31%	20%	20%	18%	4%	5%
Males DE	11%	33%	11%	8%	1%	4%	0%
Females	15%	37%	21%	18%	14%	7%	2%
Females AB	21%	55%	31%	26%	20%	15%	3%
Females C1	17%	39%	19%	19%	19%	4%	3%
Females C2	14%	39%	17%	12%	8%	10%	2%
Females DE	9%	26%	15%	11%	4%	1%	0%

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

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

Source: Ipsos MORI

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3 in 5 LinkedIn users are male and 4 in 5 are ABC1

ALL ADULTS		
49%	Male	59
51%	Female	41
15%	15-24	13
16%	25-34	18
16%	35-44	23
17%	45-54	23
36%	55+	23
27%	AB	54
27%	C1	31
21%	C2	8
24%	DE	7
73%	Own Smartphone	91
49%	Own Tablet	67

in

85% of LinkedIn users are ABC1, which fits well considering that this social network is highly specialised. This same specialisation also means that it attracts a more mature audience.

Base: circa GB adults (1,000) / All visiting / using LinkedIn in last 3 months (117) Q2 2016

Source: Ipsos MORI

LinkedIn is used more by middle age AB males

% 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	16%	12%	18%	24%	18%	18%	7%
Males AB	32%	23%	44%	44%	36%	39%	12%
Males C1	19%	15%	20%	28%	26%	14%	9%
Males C2	4%	4%	4%	7%	4%	4%	1%
Males DE	4%	9%	2%	3%	1%	6%	3%
Females	10%	8%	13%	11%	16%	10%	3%
Females AB	20%	12%	30%	20%	25%	21%	11%
Females C1	11%	13%	14%	13%	21%	7%	1%
Females C2	5%	7%	2%	5%	8%	9%	0%
Females DE	2%	3%	3%	1%	1%	1%	0%

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

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

Source: Ipsos MORI

Females are more likely to use Instagram than males

ALL ADULTS		
49%	Male	45
51%	Female	55
15%	15-24	41
16%	25-34	25
16%	35-44	17
17%	45-54	12
36%	55+	5
27%	AB	30
27%	C1	31
21%	C2	20
	DE	19
73%	Own Smartphone	98
49%	Own Tablet	64

Two thirds of all Instagram users are aged 15-34, 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 (187) Q2 2016

Source: Ipsos MORI

Higher usage of Instagram among 15-24 females

% 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	14%	37%	24%	14%	6%	6%	1%
Males AB	17%	38%	42%	20%	10%	12%	1%
Males C1	17%	43%	24%	14%	7%	4%	2%
Males C2	12%	32%	16%	11%	7%	2%	0%
Males DE	11%	34%	10%	10%	0%	4%	0%
Females	17%	51%	30%	16%	10%	4%	1%
Females AB	21%	69%	47%	19%	15%	5%	4%
Females C1	18%	51%	23%	22%	12%	3%	1%
Females C2	17%	49%	25%	12%	5%	6%	1%
Females DE	13%	47%	25%	6%	3%	1%	0%

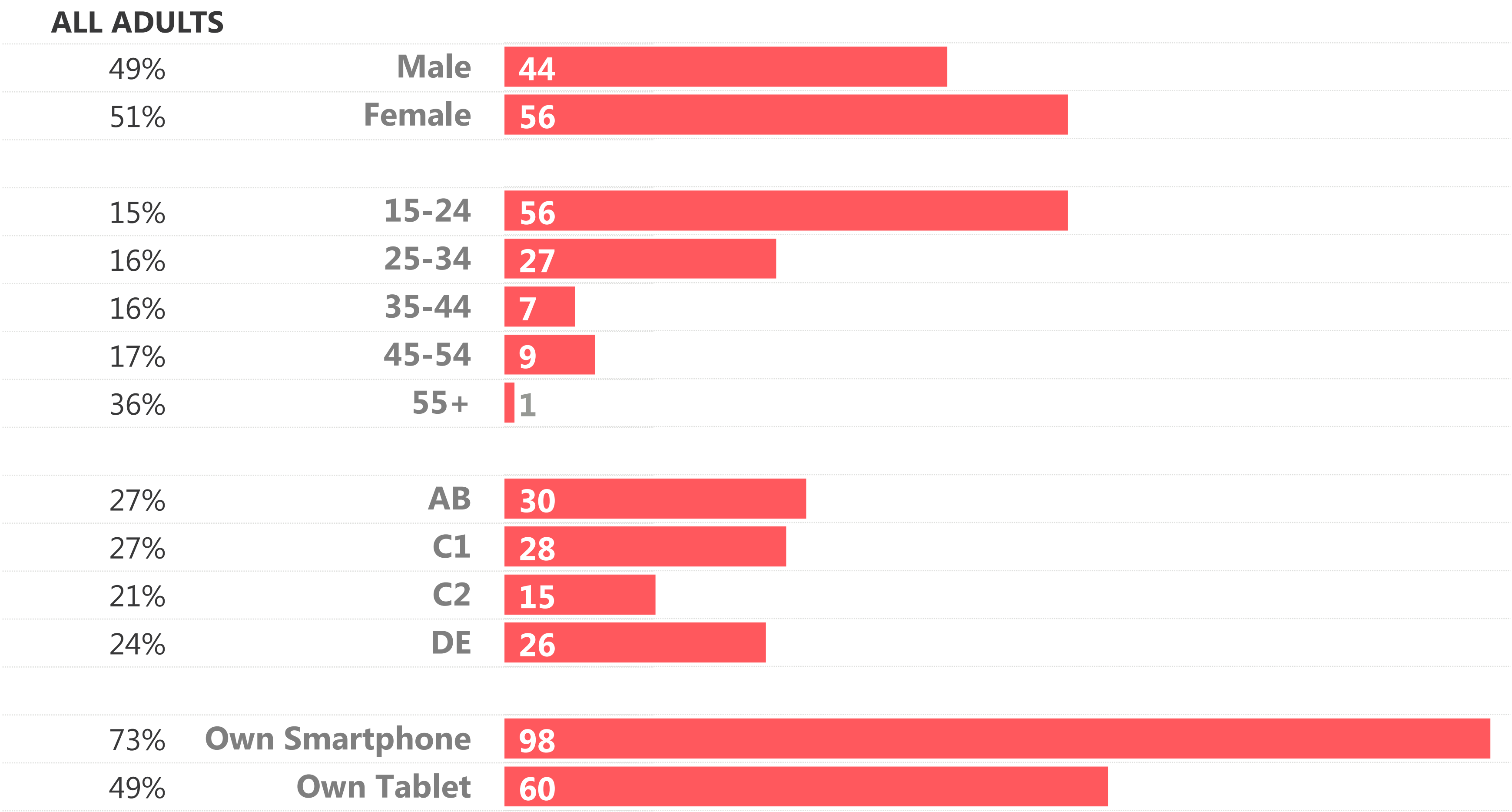
0-24% 25-49% 50-100%

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

Source: Ipsos MORI

Ipsos Connect

Snapchat users are mainly 15-24 years old



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

Snapchat functionality also lends itself to almost universal Smartphone ownership.

Base: circa GB adults (1,000) / All visiting / using Linkedin in last 3 months (187) Q2 2016

Source: Ipsos MORI

Most of these young users of Snapchat are female

% 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	11%	42%	20%	5%	2%	1%	0%
Males AB	9%	45%	19%	7%	4%	1%	0%
Males C1	14%	48%	22%	6%	1%	1%	0%
Males C2	12%	35%	25%	2%	4%	2%	1%
Males DE	11%	41%	9%	3%	0%	2%	0%
Females	13%	52%	15%	8%	6%	2%	0%
Females AB	13%	71%	21%	9%	11%	2%	1%
Females C1	14%	55%	11%	10%	5%	1%	0%
Females C2	13%	46%	12%	9%	4%	5%	0%
Females DE	12%	46%	17%	3%	2%	1%	0%

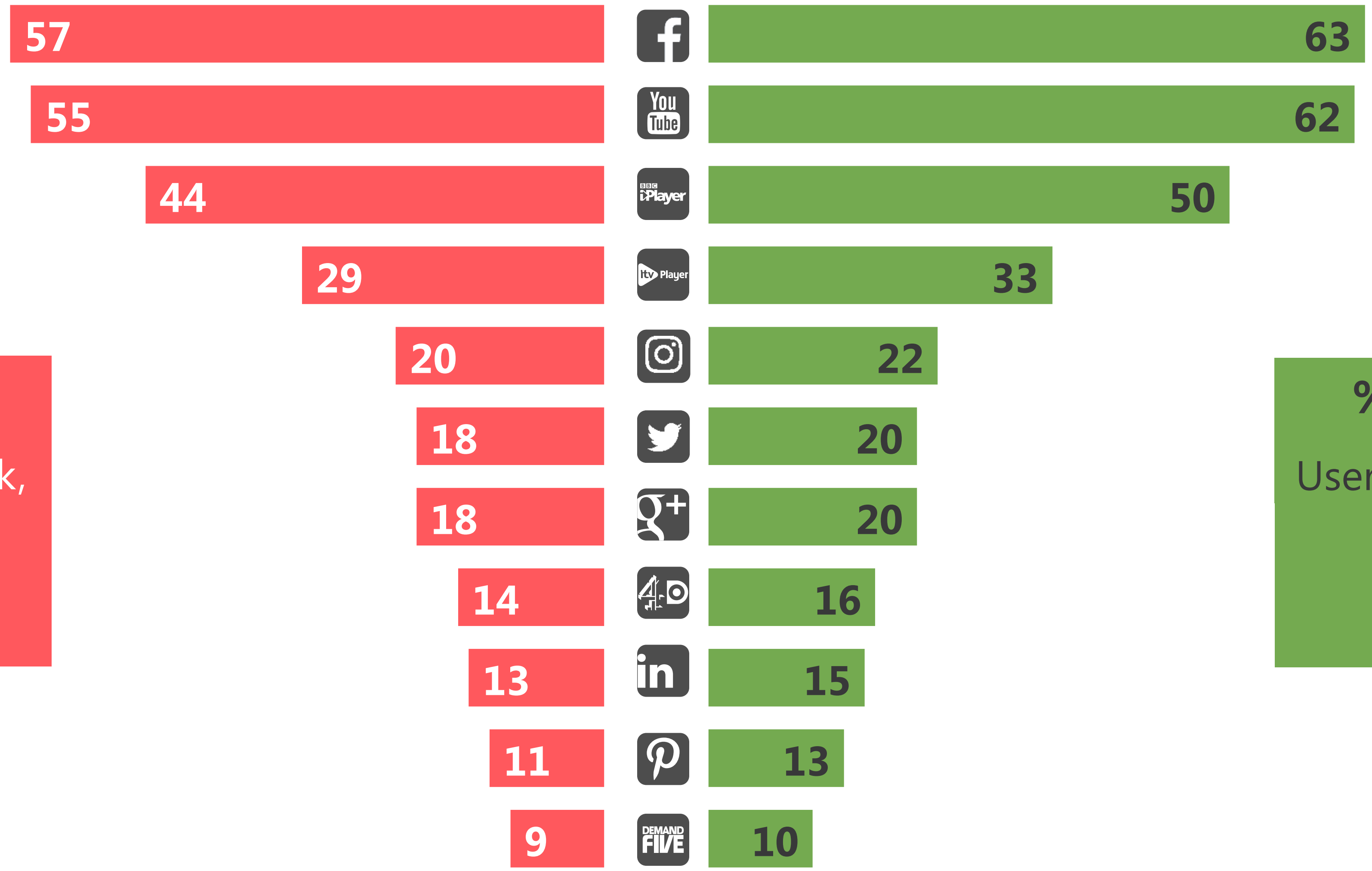
0-24% 25-49% 50-100%

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

Source: Ipsos MORI

Facebook is the most visited site, followed by YouTube

% VISITED IN LAST 3 MONTHS



% All adults

Users of either Facebook, Instagram, Twitter or Linkedin amongst all adults - 62%

% All online adults

Users of either Facebook, Instagram, Twitter or Linkedin amongst all online adults - 69%

Base: circa GB adults 1,000 adults aged 15+: Q2 2016

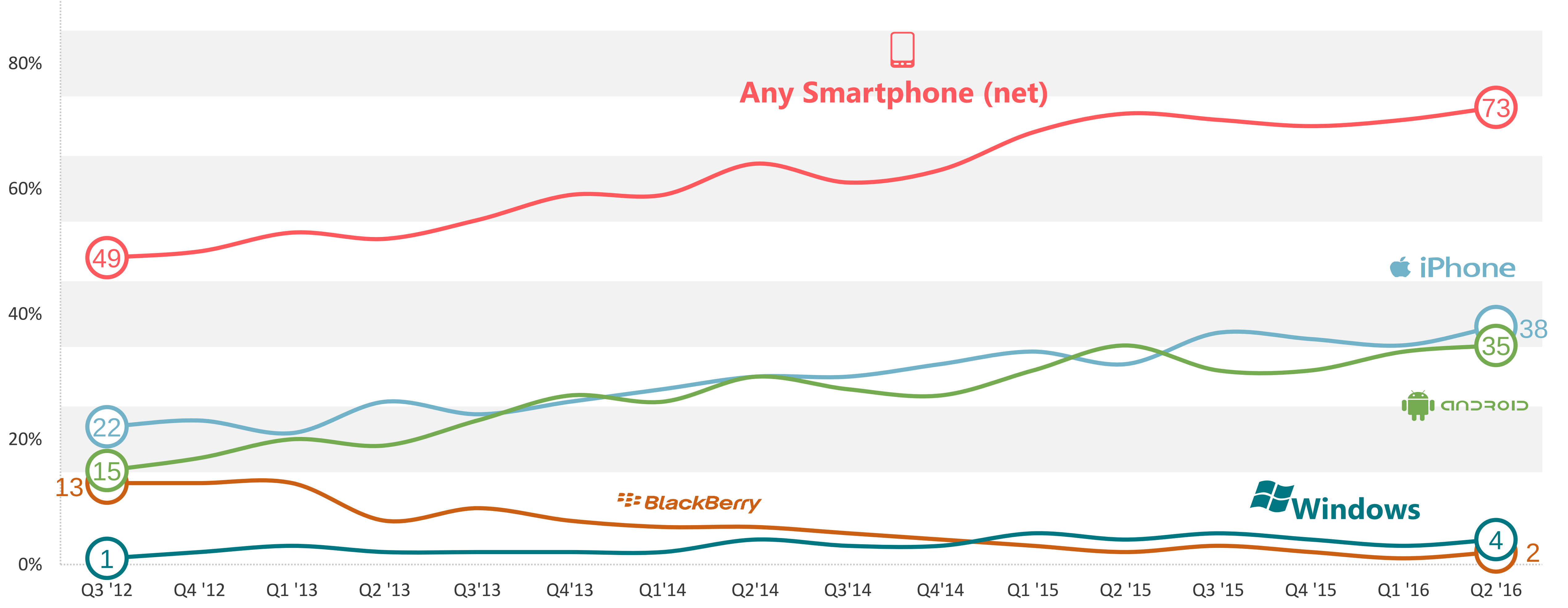
Base: 859 GB online adults aged 15+: Q2 2016

Source: Ipsos MORI

SMARTPHONE OWNERSHIP

Ownership of iPhone and Android is about equal

% OWN by MANUFACTURER



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

Source: Ipsos MORI

Whilst still low, males age 65+ are significantly more likely to own a smartphone than females

% OWN A SMARTPHONE BY GENDER AND SOCIAL GRADE

	All%	15-24%	25-34%	35-44%	45-54%	55-64%	65+%
Males%	73%	94%	91%	88%	74%	64%	33%
Males AB%	78%	100%	96%	94%	79%	75%	49%
Males C1%	79%	94%	93%	93%	80%	71%	33%
Males C2%	70%	95%	89%	84%	78%	58%	24%
Males DE%	61%	91%	83%	73%	56%	49%	12%
Females%	70%	95%	94%	88%	79%	57%	24%
Females AB%	74%	100%	96%	92%	84%	69%	27%
Females C1%	74%	97%	90%	91%	84%	65%	29%
Females C2%	73%	93%	95%	91%	73%	57%	32%
Females DE%	59%	94%	94%	77%	69%	39%	12%

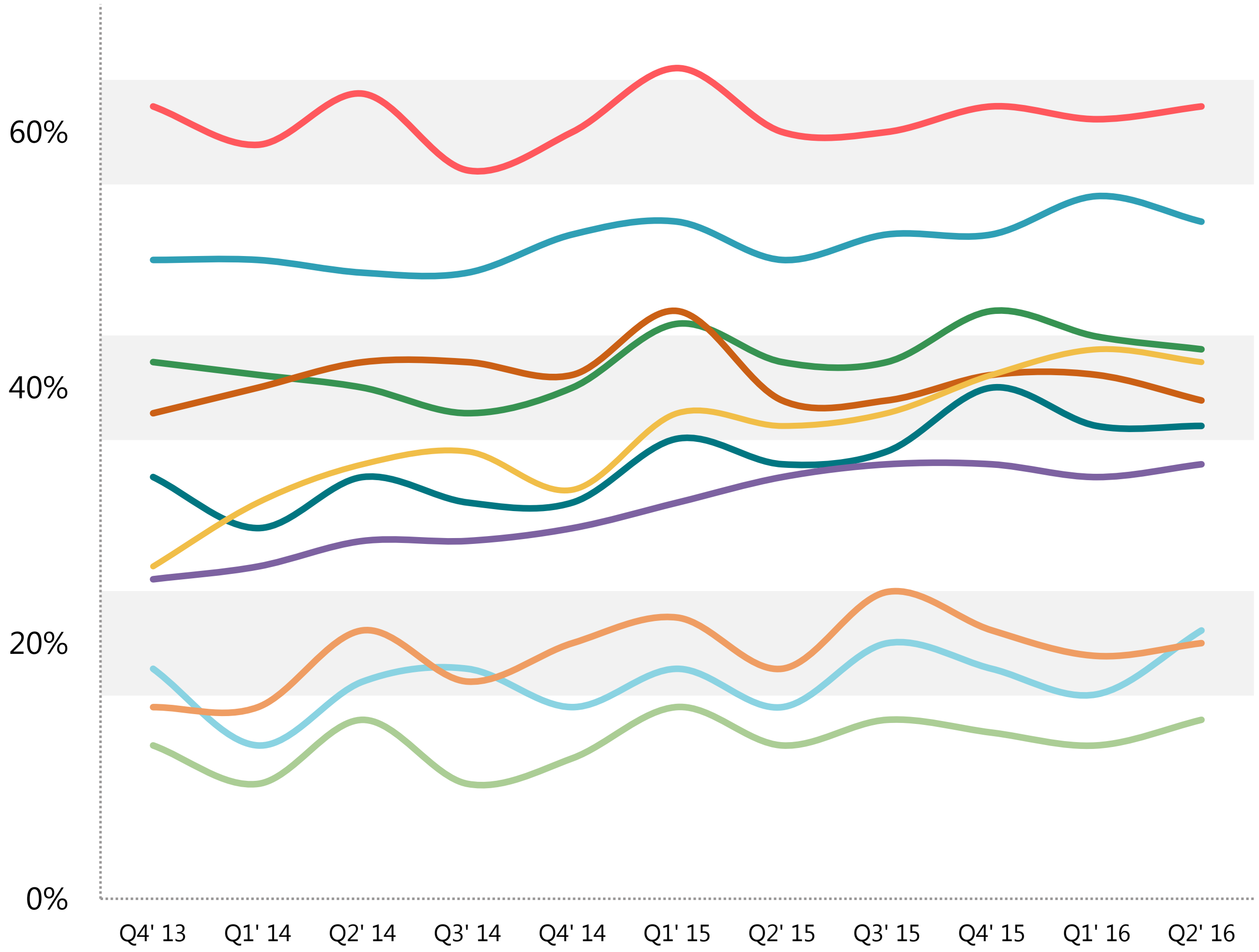
0-24% 25-49% 50-100%

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

Source: Ipsos MORI

Use of email and social media remains top activity

USE OF SMARTPHONE IN THE PAST 3 MONTHS



62% Read or send emails

53% Visit social networking sites

43% Browse websites for personal interests

42% Online banking

39% Download apps for free

37% Watch video clips on sites such as Youtube

34% Online shopping

21% Use instant messaging services such as BBM

20% Download/ stream music over the internet

14% Watch catch-up TV

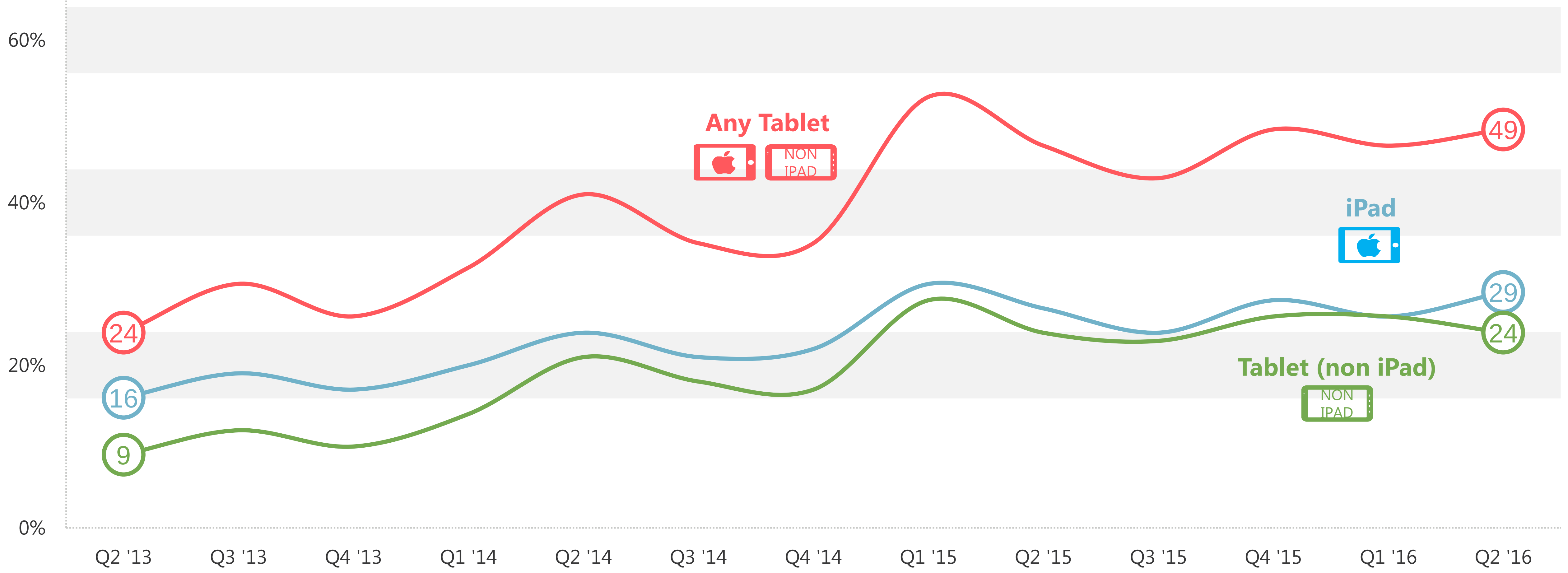
Base: circa 500-750 smartphone owners per wave

Source: Ipsos MORI

TABLET OWNERSHIP

iPad regained some of its dominance amongst tablet brands

% OWN A TABLET IN THE HOUSEHOLD



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

Source: Ipsos MORI

Tablets have a higher ownership amongst males

% OWN A TABLET BY GENDER AND SOCIAL GRADE ACROSS

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	50%	50%	57%	56%	51%	53%	34%
Males AB	64%	76%	83%	60%	73%	68%	44%
Males C1	52%	53%	51%	63%	49%	61%	36%
Males C2	45%	40%	53%	55%	49%	40%	32%
Males DE	34%	43%	41%	37%	30%	39%	16%
Females	45%	45%	49%	55%	53%	46%	27%
Females AB	59%	46%	58%	63%	70%	62%	47%
Females C1	46%	48%	46%	60%	51%	52%	30%
Females C2	38%	36%	47%	49%	46%	36%	19%
Females DE	34%	47%	45%	44%	39%	31%	14%

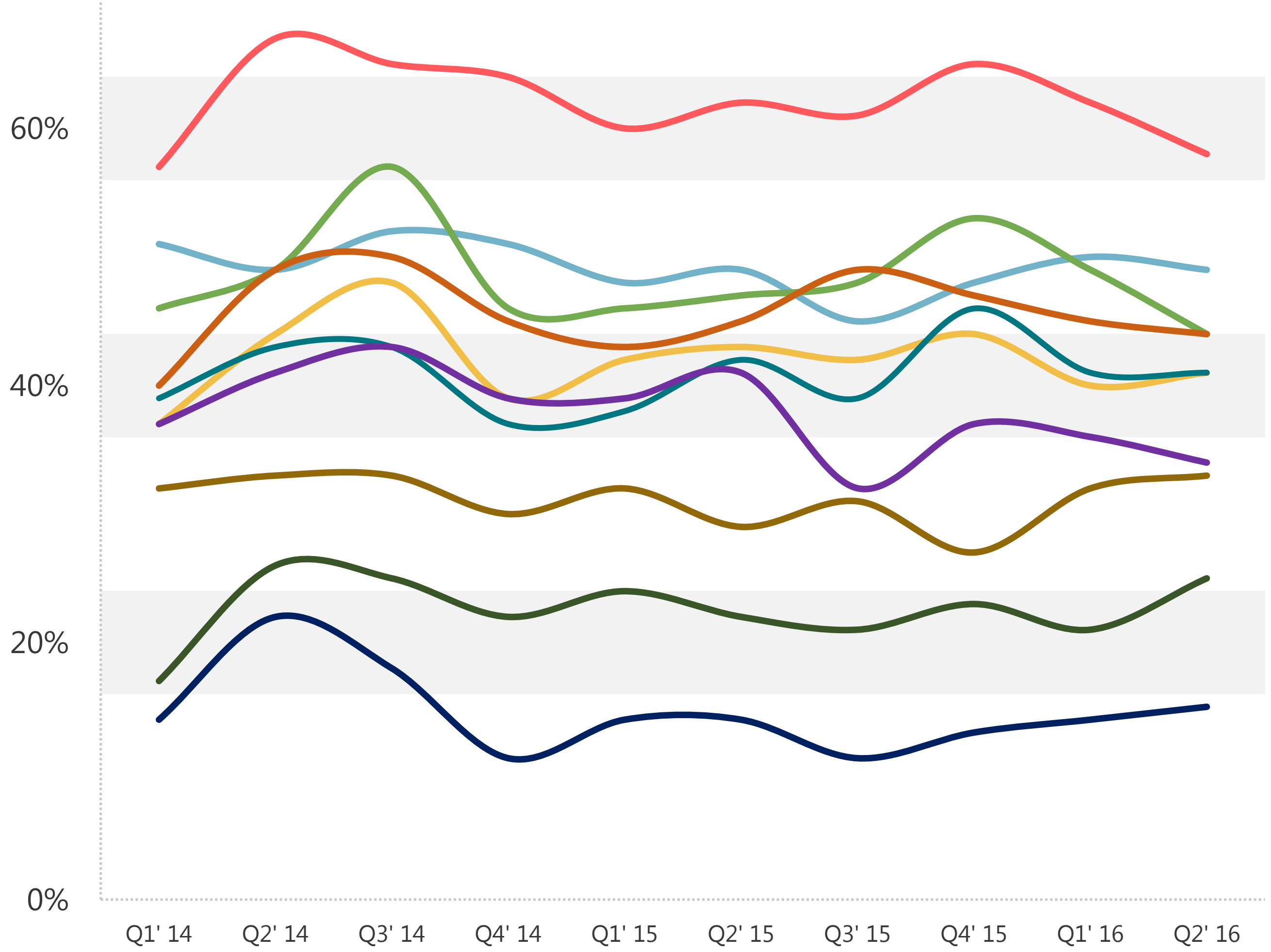
0-24% 25-49% 50-100%

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

Source: Ipsos MORI

Tablet social network usage has declined and is on par with online shopping

USE OF TABLET IN THE PAST 3 MONTHS



58% Read or send emails

49% Browse websites for personal interests

44% Visit social networking sites

44% Online shopping

41% Watch video clips on sites such as Youtube

41% Online banking

34% Download apps for free

33% Watch catch-up TV

25% Download/ stream music over the internet

15% Use the internet to make video calls (VOIP)

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

Source: Ipsos MORI

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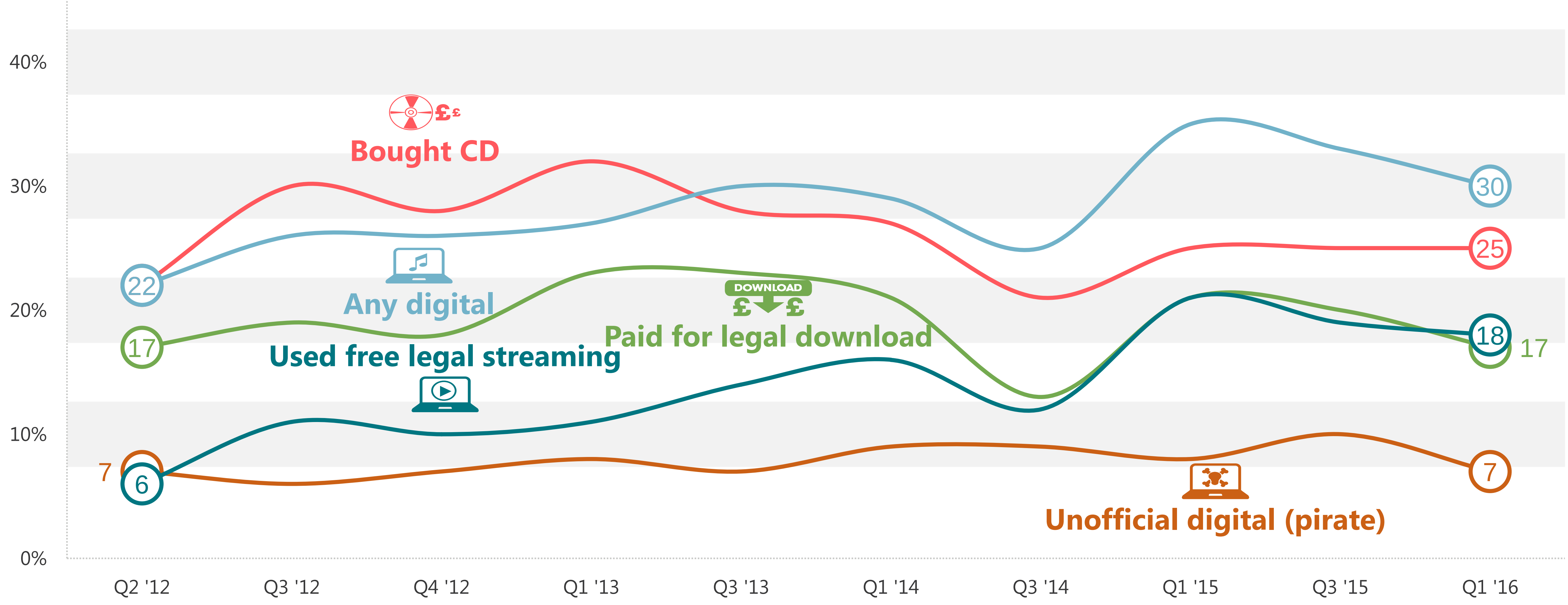
Content CONSUMPTION
Music / GAMES / TV / MOVIES

Digital still beats bought CDs

MUSIC CONSUMPTION

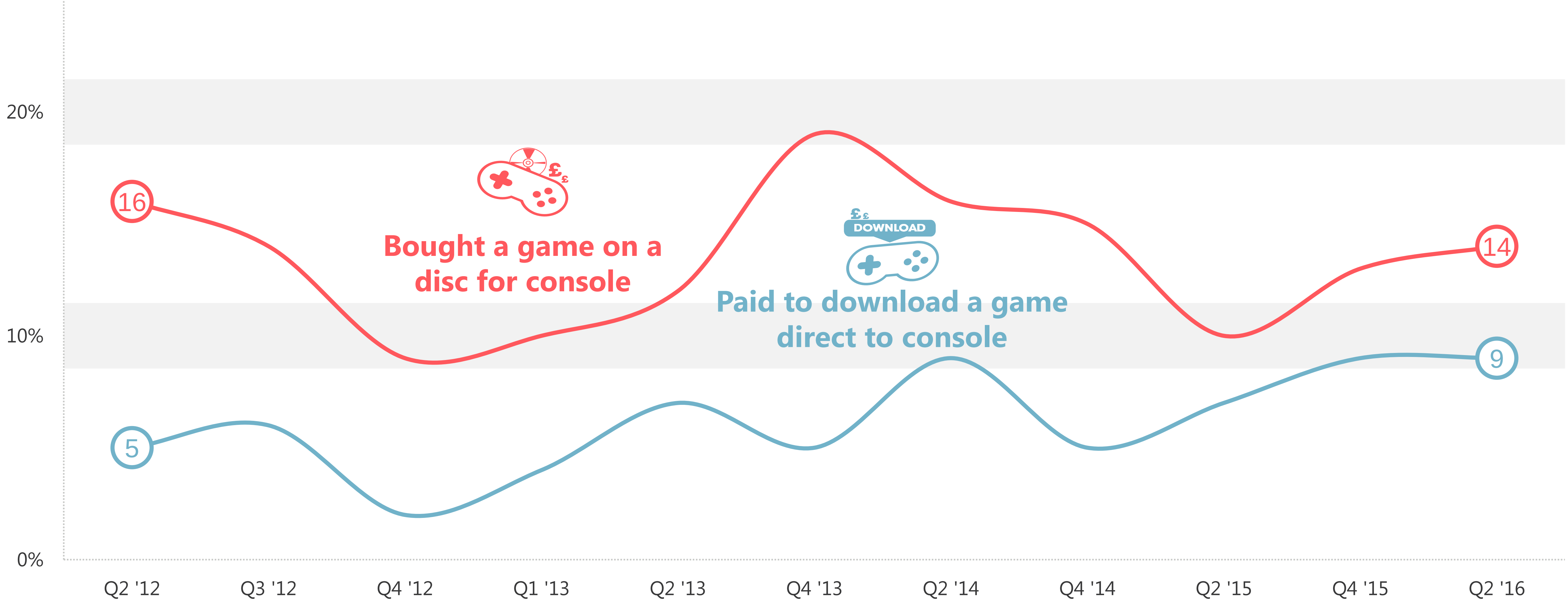


Base: circa 1,000 GB adults aged 15+ per wave / Music consumption is tracked every 6 months

Source: Ipsos MORI

Buying of disc games for consoles is still higher

GAMES CONSUMPTION

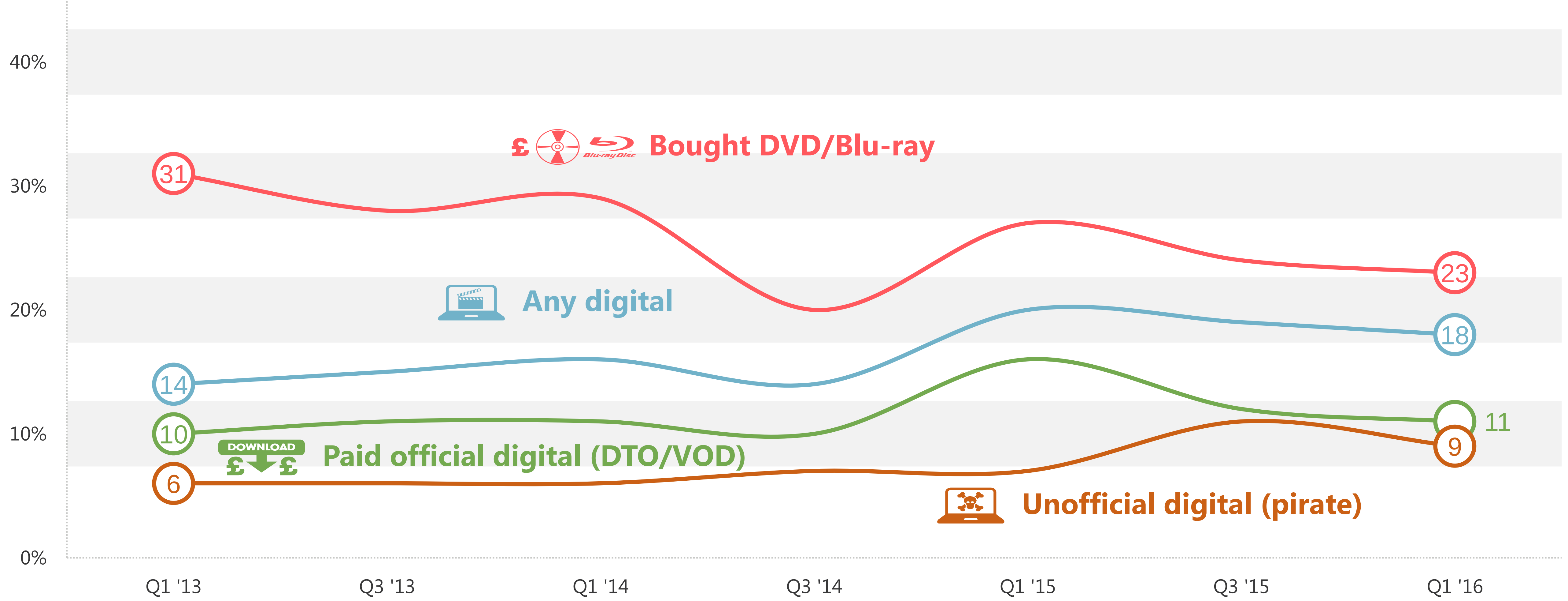


Base: circa 1,000 GB adults aged 15+ per wave / Games consumption is tracked every 6 months

Source: Ipsos MORI

The gap between digital and physical is closing

MOVIE CONSUMPTION



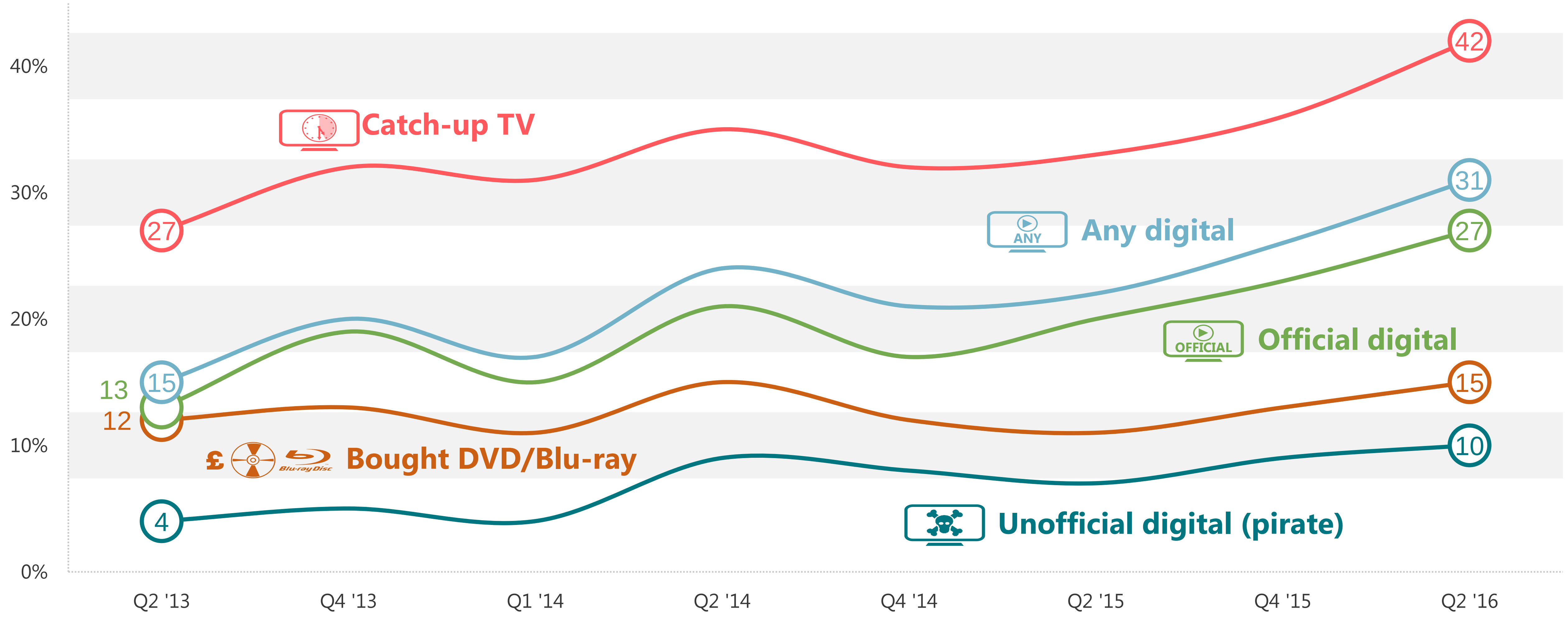
Base: circa 1,000 GB adults aged 15+ per wave / Movie consumption is tracked every 6 months

Source: Ipsos MORI

Ipsos Connect

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

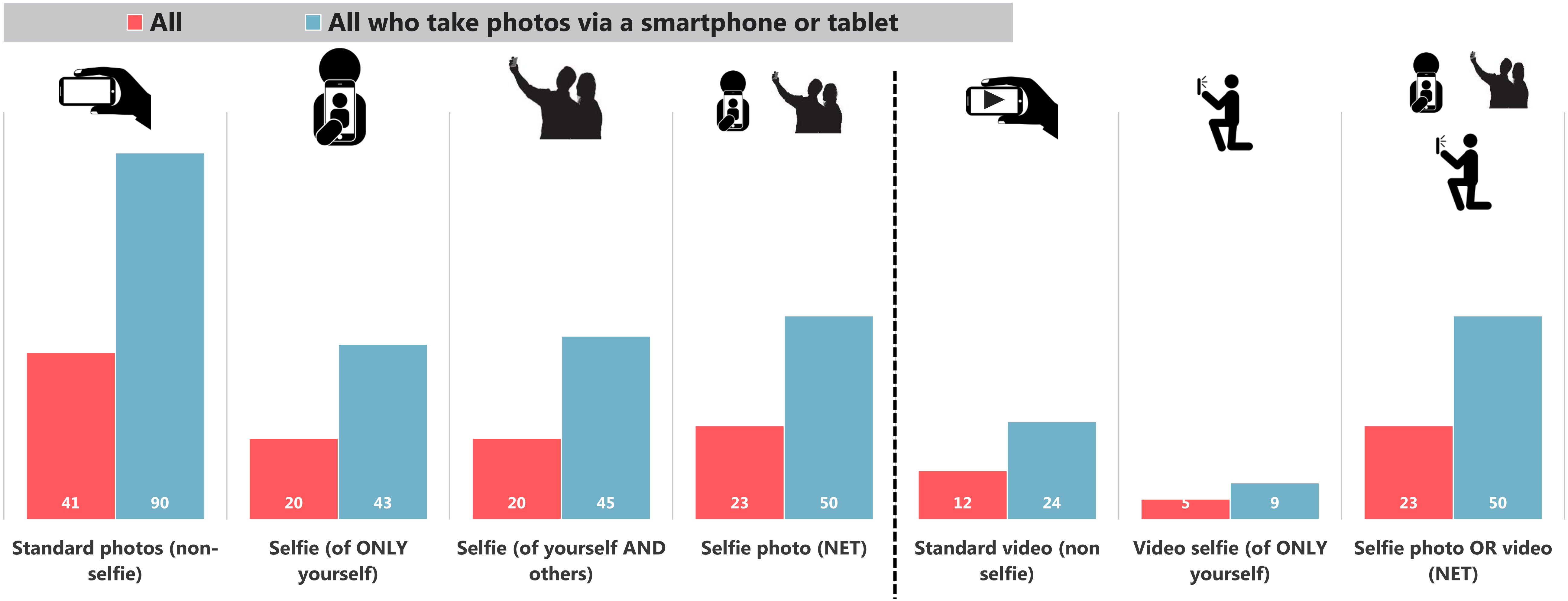
Source: Ipsos MORI

THE SELFIE GENERATION

Ipsos Connect

People take more selfie photos than videos

% TYPES OF PHOTO/VIDEO TAKEN



Base: circa 1,000 GB adults aged 15+: Q2 2016

Source: Ipsos MORI

15-34s & ABC1s take more standard photos and selfies

% TAKE PHOTO TYPES ON A SMARTPHONE/TABLET (TOTAL POPULATION)

	Standard Photo (non selfie)	Selfie (of only yourself)	Selfie (of yourself and others)	Standard video (non-selfie)	Video selfie (of only yourself)	Selfie photo OR video (NET)	Selfie photo (NET)
All adults	41	20	20	12	5	23	23
Males	37	17	17	12	4	19	19
Females	45	23	24	11	5	27	27
15-34	52	35	35	15	9	40	40
35+	36	13	14	10	3	15	15
ABC1	51	22	25	15	6	27	26
C2DE	29	17	15	8	3	19	19

0-9% 10-24% 25-49% 50%+

Base: circa 1,000 GB adults aged 15+: Q2 2016

Source: Ipsos MORI

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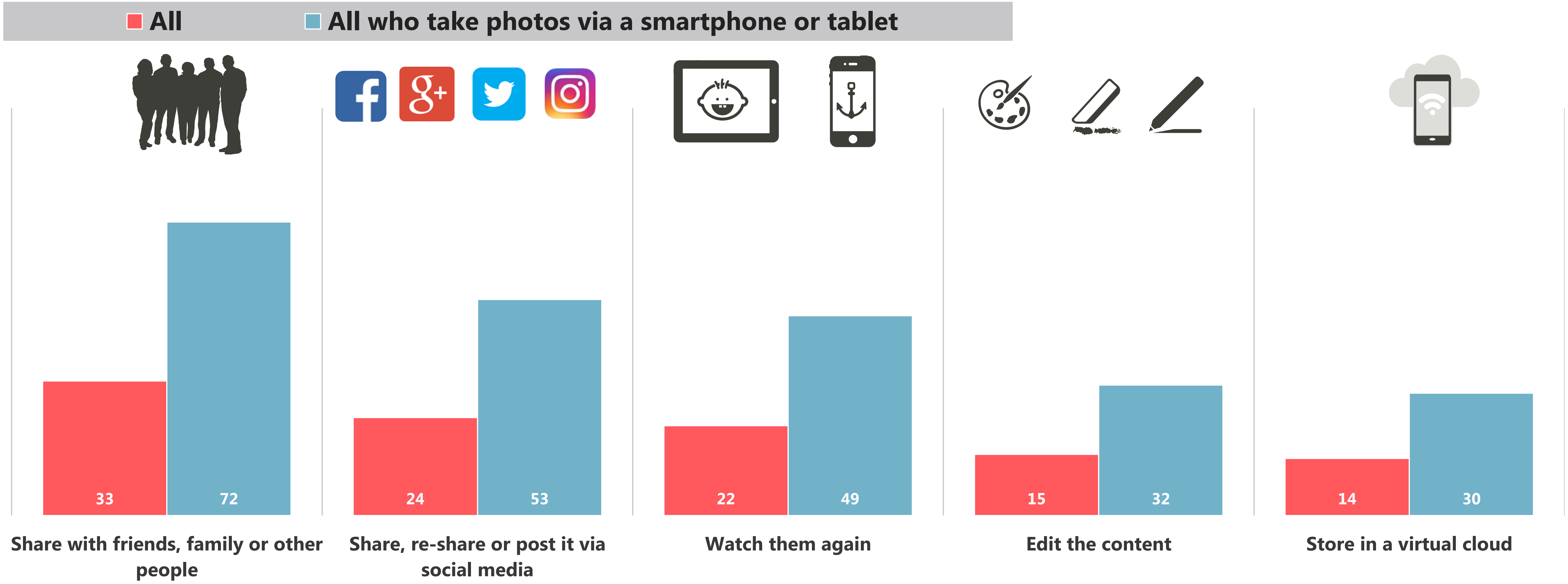
People are more likely to share their videos/photos with friends and family than on social media

% ACTIVITES DONE WITH PHOTOS/VIDEOS TAKEN



Base: circa 1,000 GB adults aged 15+: Q2 2016

Source: Ipsos MORI

Females and the younger generation tend to share more on social media

% ACTIVITES DONE WITH PHOTOS/VIDEOS TAKEN

	Share with friends/family or other people	Share, re-share or post it via social media	Watch them again	Edit content	Store in a virtual cloud
All adults	72	53	49	32	30
Males	68	46	49	29	31
Females	76	59	49	45	30
15-34	71	63	45	37	24
35+	73	46	51	29	34
ABC1	78	58	53	36	34
C2DE	62	44	41	26	24

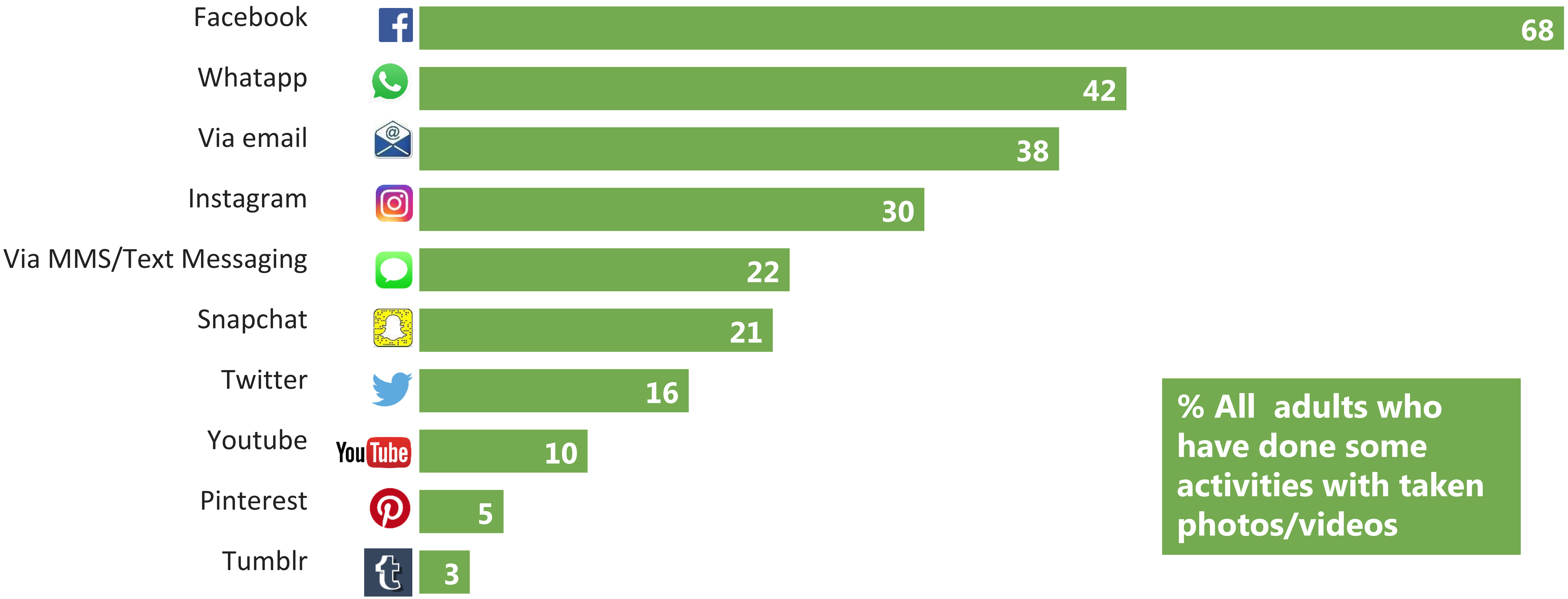
0-9% 10-24% 25-49% 50%+

Base: Adults who take photo/ video via smartphone (431): Q2 2016

Source: Ipsos MORI

Facebook remains the most popular platform for sharing photos

% SHARED PHOTOS/VIDEOS



% All adults who have done some activities with taken photos/videos

Base: Adults who have done some activities with taken photos/videos (404): Q2 2016

Source: Ipsos MORI

Almost half of 15-34s share their photos/videos on Instagram and Snapchat

% SHARED PHOTOS/VIDEOS PER PLATFORM

	Facebook	Whatsapp	Via email	Instagram	Via MMS/Text	Snapchat	Twitter	Youtube
All adults	68	42	38	30	22	21	16	10
Males	61	40	39	26	22	16	20	9
Females	73	44	37	34	23	23	13	11
15-34	80	53	21	49	25	43	22	14
35+	60	35	49	17	21	5	12	8
ABC1	66	42	46	29	24	21	19	10
C2DE	71	43	23	32	20	20	12	11

0-9% | 10-24% | 25-49% | 50%+

Base: Adults who have done some activities with taken photos/videos (404): Q2 2016

Source: Ipsos MORI

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TECH TRACKER TECHNICAL DETAILS

- Ipsos MORI interviewed a quota sample of **1004 adults aged 15+ in GB**.
- The latest interviews were carried out face to face **25th April – 10th May 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.

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 specialized business to co-ordinate Ipsos services in the domains of Brand Communications, Advertising and Media. Ipsos Connect amalgamates the legacy brands of Ipsos ASI and Ipsos MediaCT.

As the world of brand communications, advertising and media become increasingly complex, fragmented and digitalized, 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.

Ipsos Connect is a specialist division within Ipsos, one of the world's largest market research agencies. Ipsos has offices in 87 countries, generating global revenues of €1.669,5 million (2 218,4M$) in 2014.

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