TECH TRACKER

QUARTERLY RELEASE: Q4 2014

Technology Tracker

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 2014 (Field in November)

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
- Next Generation Tech Monitor

HEADLINES

Internet usage

The proportion of adults accessing the internet remains consistent at 85%, with access via mobile continuing to increase at 59%.

The top online activities remain: accessing email (77%), browsing for information on hobbies (68%), researching products and services (62%) and online shopping (57%).

Connected home

The 15% of GB households have a connected TV.

31% of GB adults have at least one of the games console in their household which has remained at a consistent level across 2014. Ownership of consoles between brands is almost equal with both Wii/WiiU (14%) & PS3/4 (13%) and Xbox 360/One penetration at 17%.

Social networking

56% of GB adults access social networking sites, with 35% doing do via their PC/ laptop, 33% access via a Smartphone with access via a Tablet at 16%.

52% of all adults have used Facebook in the past 3 months. 15% have used Twitter, 16% used Google+ and 9% used LinkedIn.

Smartphones

Smartphone ownership is 63%. iOS penetration has risen since last wave to 32% - buoyed by the release of the iPhone 6. This leads Android which registers penetration of 27%.

Tablets

Tablet ownership is just over 1 in 3 households at 35%. Amongst tablet owners, almost two-thirds (63%) are iPad owners. E-mailing and browsing websites of personal interest are the top activities conducted on this device. A number of activities have witnessed a drop from Q3 ’14 as a result of these activities being conducted on a Smartphone instead.

Content consumption

32% of GB adults have consumed a TV series via catch-up, with 2 in 10 claiming to consume in a digital format (official or unofficial).

The preferred format for purchasing games continues to be via a disc, with 15% amongst games console owners, as opposed to 5% who have downloaded directly to their console.

Next Generation Tech Monitor

4G and Cloud Computing solutions have arguably made the switch into the mainstream consumer lifestyle and this is reflected by awareness of 65% and 19% usage of 4G and 49% awareness and 15% of GB adults claiming to use cloud computing.

The more niche technologies also have strong awareness despite not being widely available for purchase (smartwatches at 44% and smartglasses at 33%), with the exception of projection gaming.

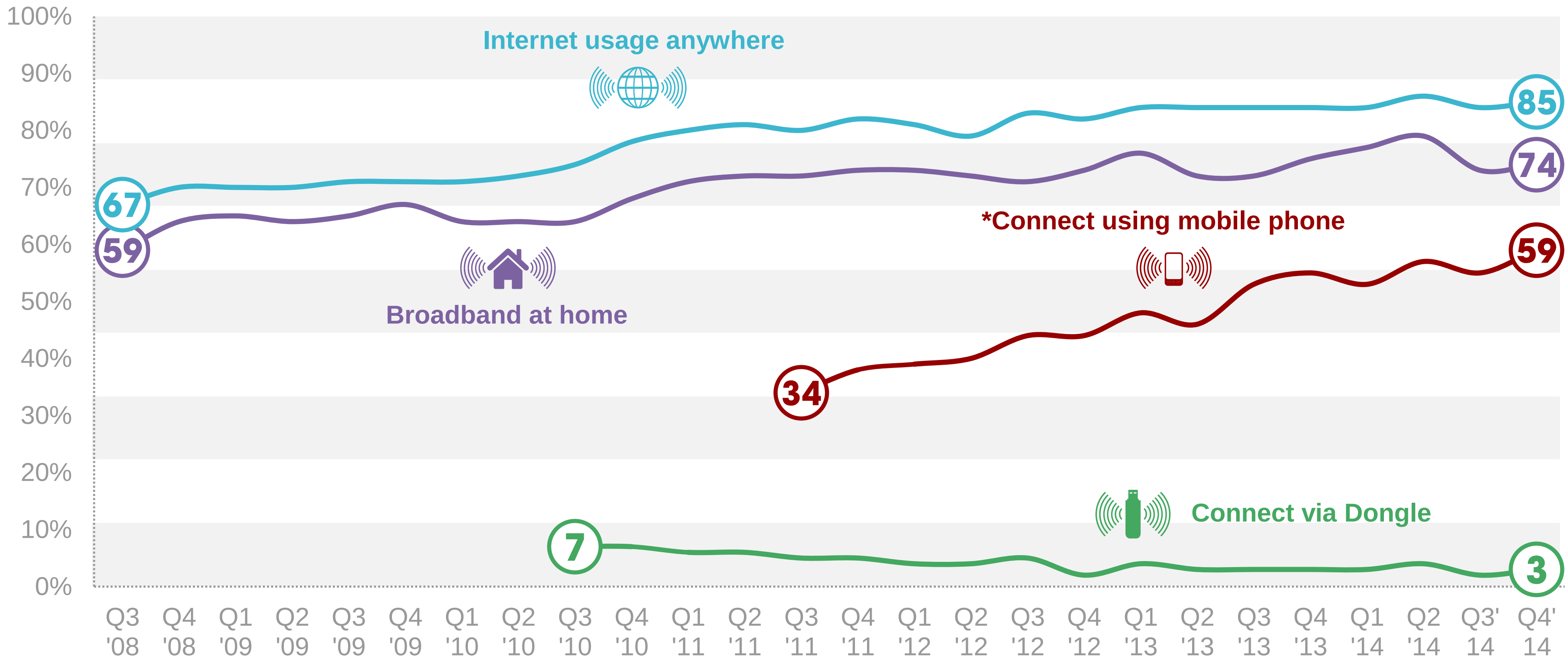
Despite high awareness, uptake is low for the majority of technologies – apart from cloud computing and 4G, all other technologies sit below 5% ownership or usage.

INTERNET USAGE

HOW, WHEN, WHERE

INTERNET USAGE TRENDS

% 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 in 2010, circa 1000 GB adults aged 15+ per wave thereafter

Source: Ipsos MORI

WHO IS AND ISN'T ACCESSING THE INTERNET

% ACCESSING THE INTERNET BY GENDER AND SOCIAL GRADE IN 2013/2014

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	86%	97%	97%	92%	90%	82%	60%
Males AB	94%	100%	96%	100%	99%	94%	81%
Males C1	91%	97%	98%	97%	95%	92%	65%
Males C2	83%	97%	97%	92%	87%	84%	49%
Males DE	74%	96%	96%	76%	73%	53%	39%
Females	84%	97%	96%	93%	92%	82%	53%
Females AB	95%	100%	100%	100%	98%	94%	84%
Females C1	88%	99%	99%	99%	97%	91%	58%
Females C2	80%	98%	94%	93%	92%	81%	30%
Females DE	70%	94%	92%	78%	72%	56%	35%

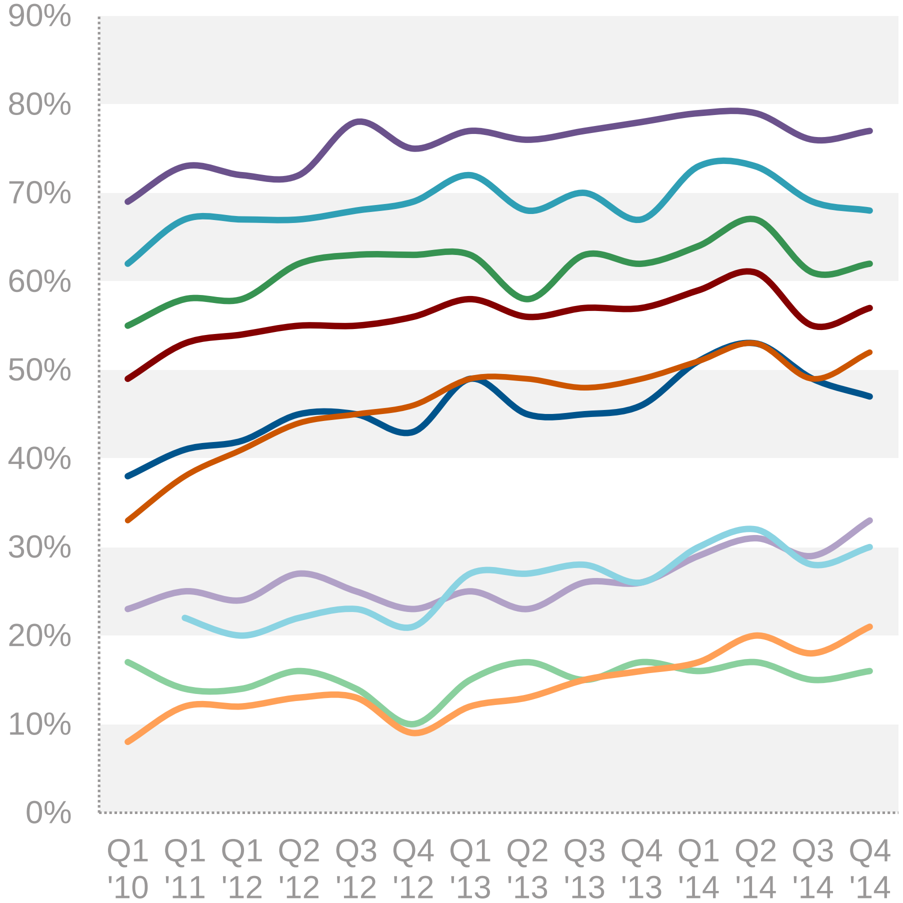
0-49% 50-79% 80-100%

Base: circa 1,000 GB adults aged 15+: Q1 / Q2/ Q3/ Q4 2014

Source: Ipsos MORI

CHANGING WAYS THE INTERNET IS USED

% USE OF THE INTERNET IN THE PAST 3 MONTHS



77%	Emails
68%	Visit sites for info personal interests
62%	Visit sites for info on products thinking of buying
57%	Visit sites to buy on products online
52%	Social networking
47%	Check bank account/other financial holdings
33%	Download/stream music
30%	Download/stream TV
21%	Download/stream movies
16%	Play video games online

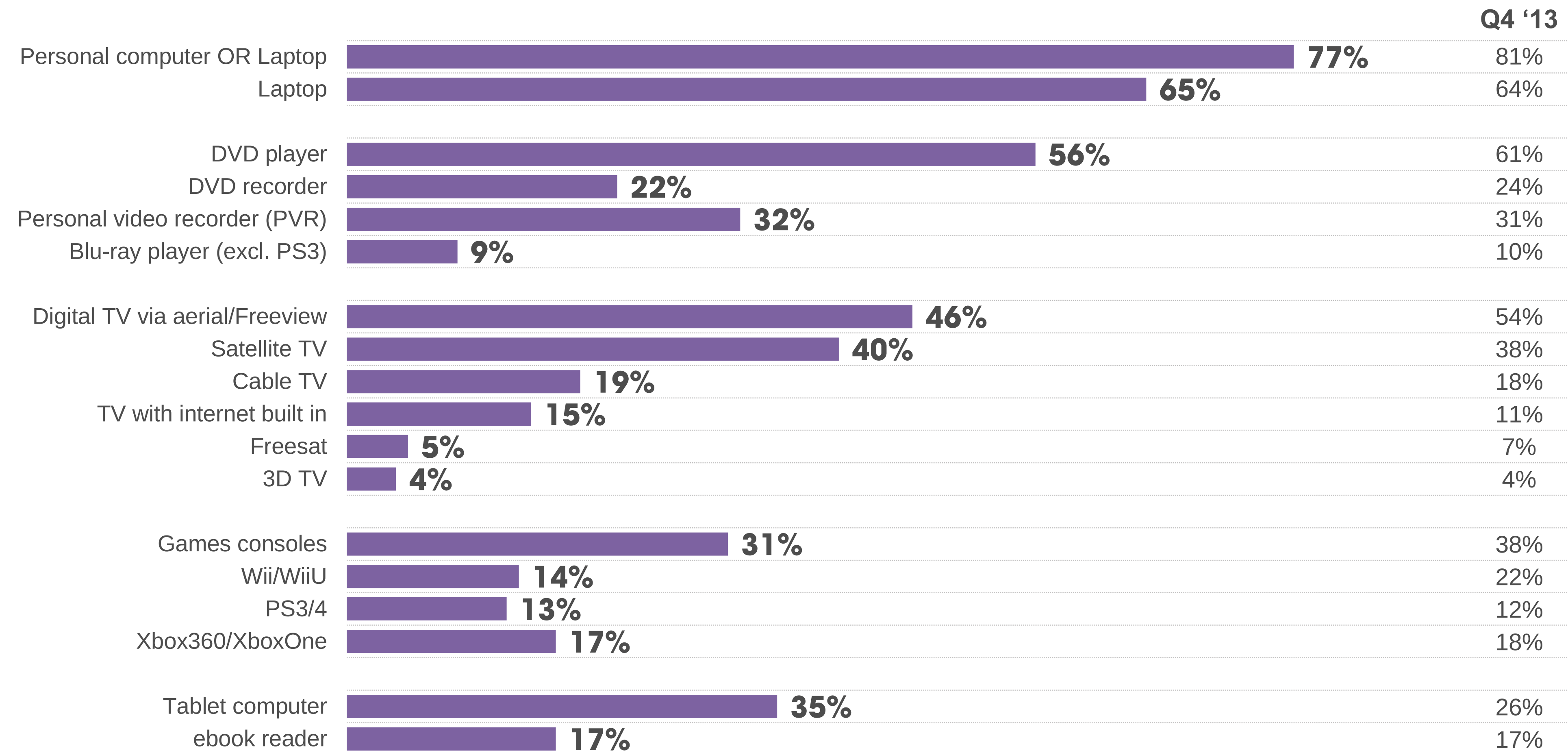
Base: circa 2,000 interviews per wave until Quarter 1 2010, circa 1,000 GB adults aged 15+ per wave thereafter

Source: Ipsos MORI

CONNECTED HOME

EQUIPMENT IN THE HOME

WHICH OF THE FOLLOWING DO YOU OWN/HAVE IN YOUR HOUSEHOLD?: Quarter 4 2014

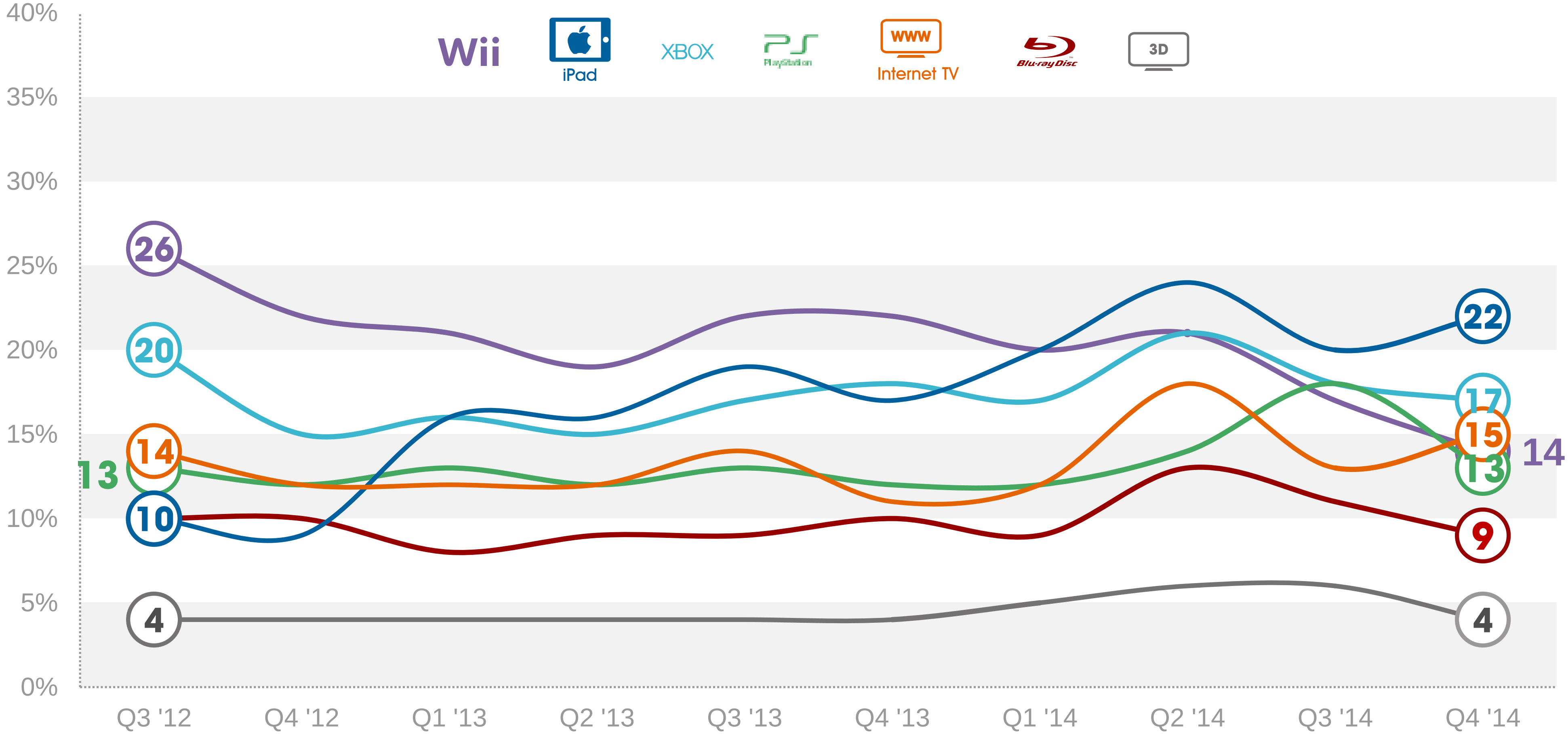


Base: circa 1,000 GB adults aged 15+: Quarter 4 2014

Source: Ipsos MORI

TRENDS IN EQUIPMENT OWNERSHIP IN THE HOME

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



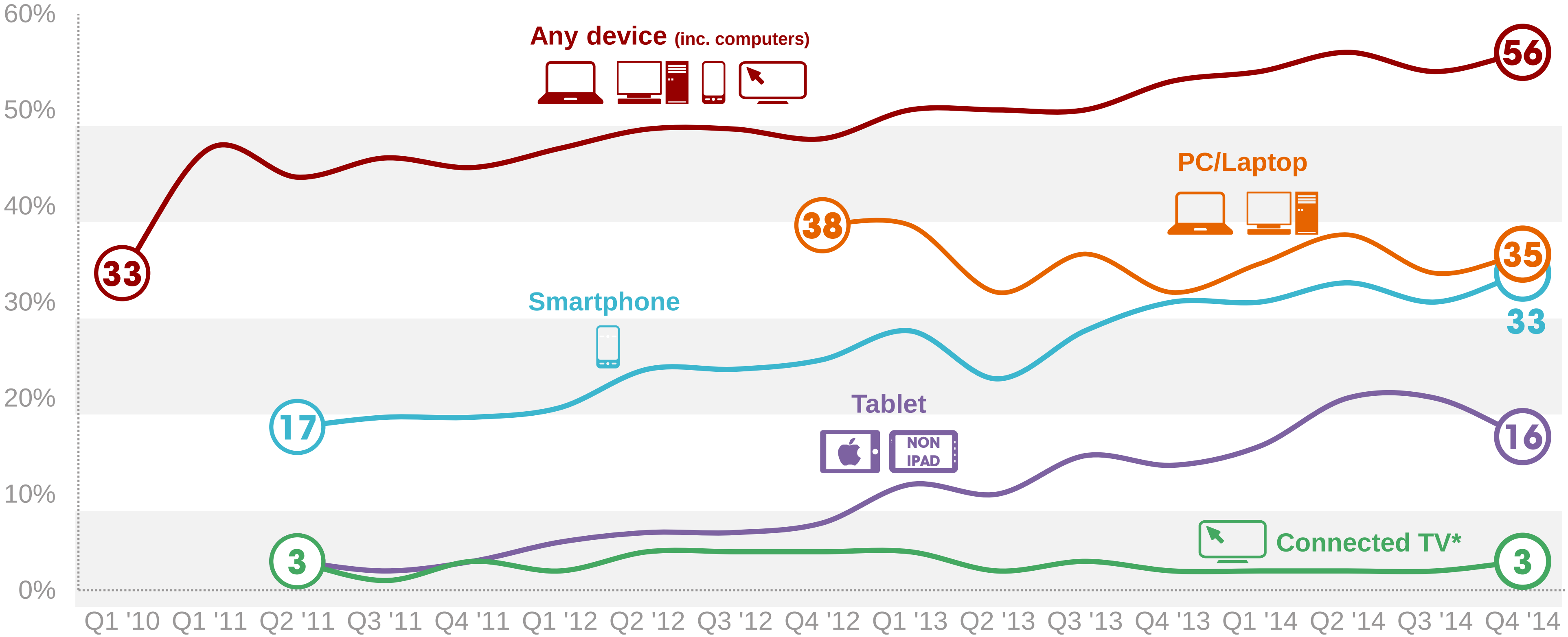
Base: circa 1,000 GB adults aged 15+ per wave

Source: Ipsos MORI

SOCIAL NETWORKING

TRENDS IN VISITING SOCIAL NETWORKING SITES

% VISITING SOCIAL NETWORKING SITES



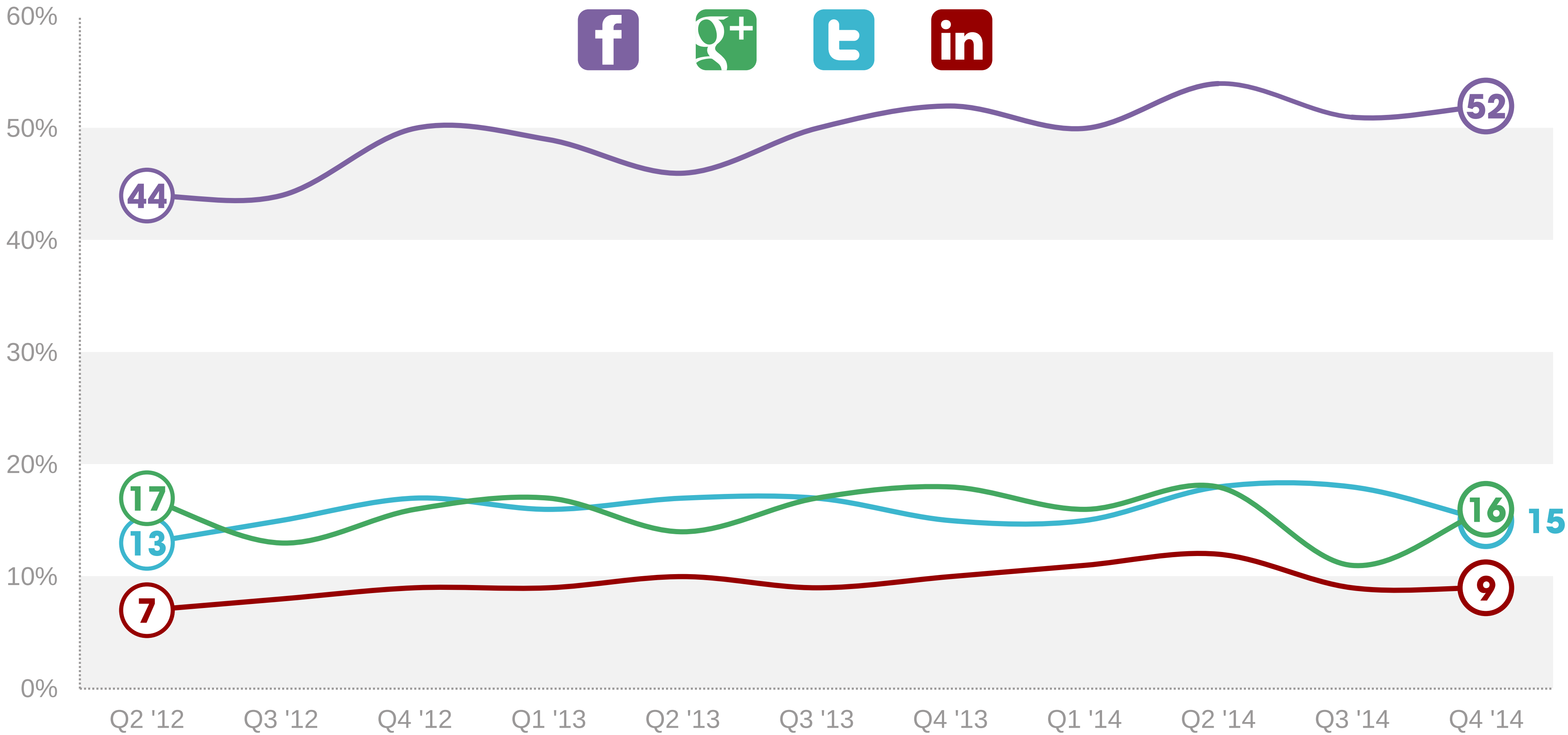
Connected TV* - Games console, web enabled TVs and PCs connected to a TV

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

Source: Ipsos MORI

TRENDS IN SOCIAL NETWORKING SITES VISITED

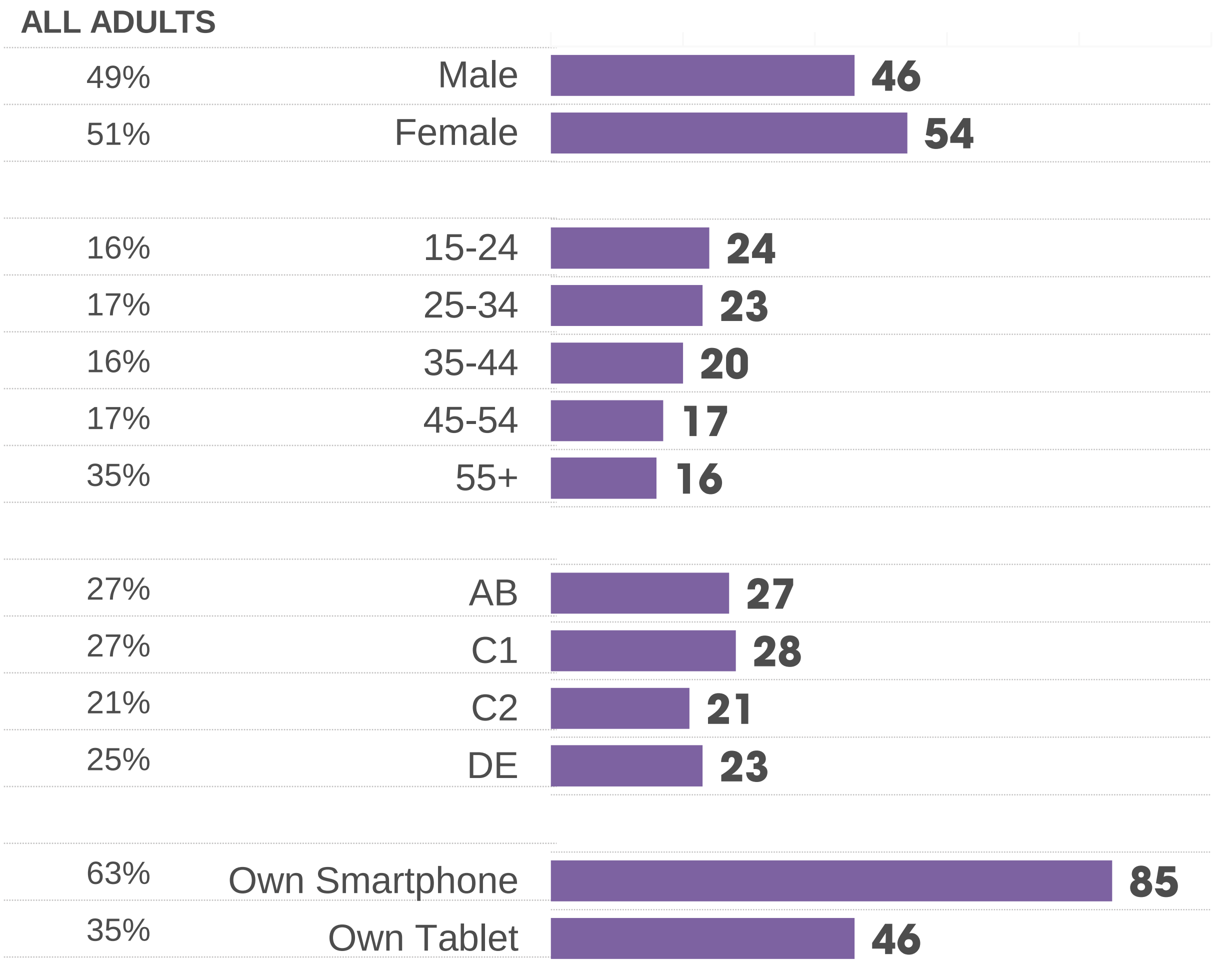
% VISITED IN LAST 3 MONTHS



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

Source: Ipsos MORI

PROFILE OF FACEBOOK USERS



The profile of Facebook users is relatively young with 47% of users aged 15-34.

Smartphone and Tablet ownership is also higher amongst Facebook users in comparison to the GB adult population.

Base: circa GB adults (1,000) / All visiting / using Facebook in last 3 months (472): Q4 2014

Source: Ipsos MORI

Social Networking – Facebook

% ACCESSING FACEBOOK IN THE PAST 3 MONTHS, BY GENDER AND SOCIAL GRADE IN 2014

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	51%	78%	74%	57%	50%	36%	13%
Males AB	54%	94%	82%	61%	64%	45%	17%
Males C1	55%	82%	80%	66%	42%	31%	13%
Males C2	49%	73%	68%	51%	52%	42%	11%
Males DE	43%	67%	69%	46%	35%	24%	7%
Females	53%	86%	75%	64%	54%	39%	16%
Females AB	52%	83%	78%	62%	55%	44%	22%
Females C1	58%	89%	76%	73%	62%	48%	16%
Females C2	55%	91%	71%	66%	58%	31%	13%
Females DE	48%	80%	73%	57%	32%	28%	13%

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

Base: circa 4,000 GB adults aged 15+: Q1/ Q2/ Q3/ Q4 2014

Source: Ipsos MORI

PROFILE OF GOOGLE+ USERS

ALL ADULTS		
49%	Male	50
51%	Female	50
16%	15-24	21
17%	25-34	24
16%	35-44	22
17%	45-54	15
35%	55+	18
27%	AB	30
27%	C1	29
21%	C2	20
25%	DE	21
63%	Own Smartphone	87
35%	Own Tablet	43

Google+ users are equally split among males and females and have a younger profile than the GB adult population.

Base: circa GB adults (1,000) / All visiting / using Google+ in last 3 months (137): Q4 2014

Source: Ipsos MORI

Social Networking – Google+

% ACCESSING GOOGLE+ IN THE PAST 3 MONTHS, BY GENDER AND SOCIAL GRADE IN 2014

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	16%	21%	19%	23%	17%	12%	5%
Males AB	17%	15%	13%	27%	24%	17%	7%
Males C1	22%	31%	29%	27%	19%	16%	4%
Males C2	12%	15%	10%	18%	15%	11%	4%
Males DE	12%	17%	24%	16%	8%	2%	2%
Females	15%	24%	20%	13%	14%	13%	7%
Females AB	17%	34%	31%	8%	18%	11%	17%
Females C1	14%	27%	15%	14%	14%	16%	3%
Females C2	16%	21%	17%	22%	17%	15%	6%
Females DE	12%	20%	20%	11%	4%	11%	3%

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

Base: circa 4,000 GB adults aged 15+: Q1/ Q2/ Q3/ Q4 2014

Source: Ipsos MORI

PROFILE OF TWITTER USERS

ALL ADULTS		Twitter users
49%	Male	47
51%	Female	53
16%	15-24	35
17%	25-34	24
16%	35-44	19
17%	45-54	11
35%	55+	11
27%	AB	32
27%	C1	31
21%	C2	21
25%	DE	16
63%	Own Smartphone	98
35%	Own Tablet	47

Nearly 6 in 10 Twitter users are aged under 35.

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 (127): Q4 2014

Source: Ipsos MORI

Social Networking – Twitter

% ACCESSING TWITTER IN THE PAST 3 MONTHS, BY GENDER AND SOCIAL GRADE IN 2014

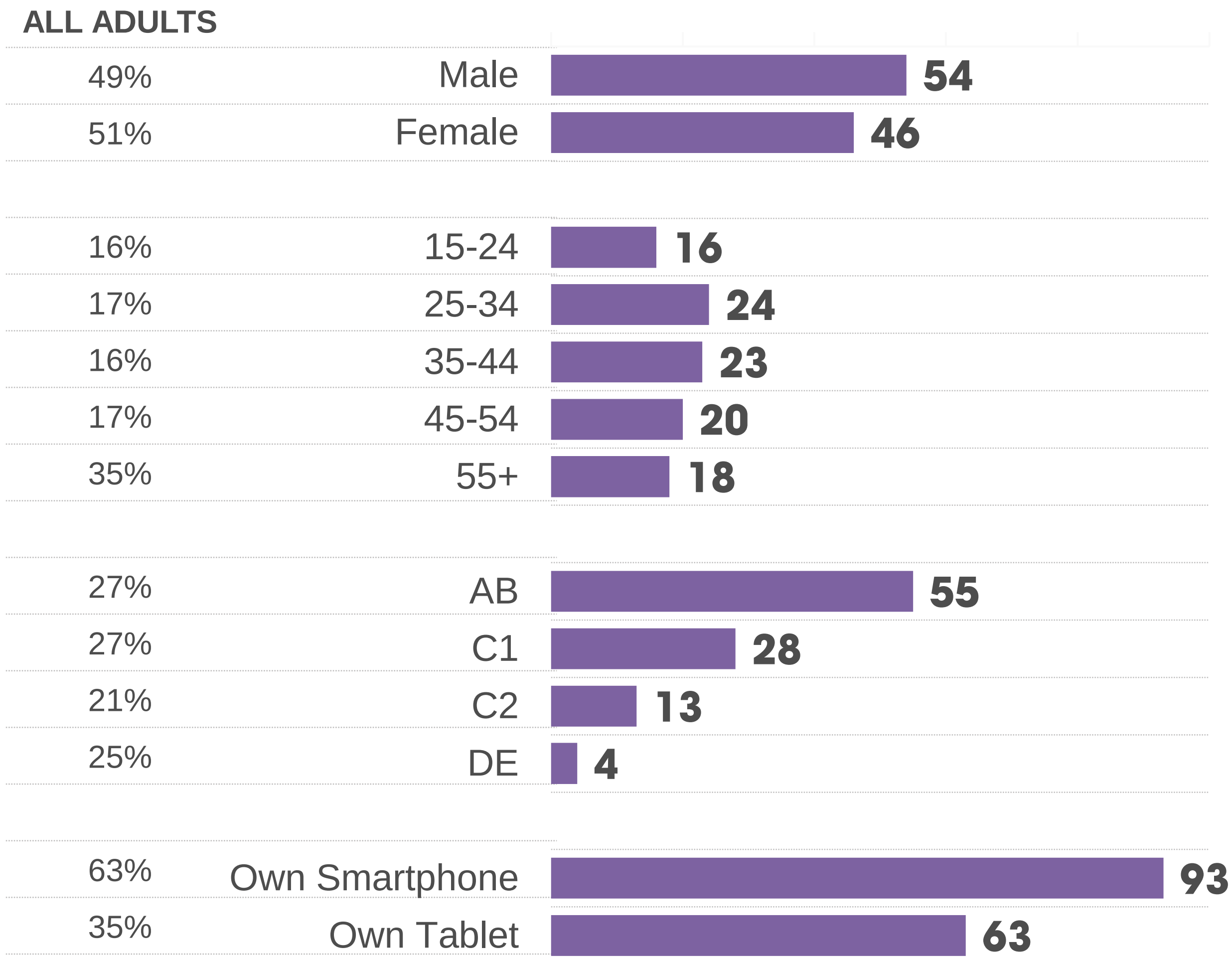
	All	15-24	25-34	35-44	45-54	55-64	65+
Males	18%	35%	25%	24%	17%	7%	2%
Males AB	24%	38%	42%	33%	28%	12%	5%
Males C1	19%	38%	24%	27%	10%	1%	3%
Males C2	17%	35%	23%	18%	18%	13%	0%
Males DE	12%	29%	16%	11%	6%	4%	1%
Females	15%	41%	19%	18%	11%	6%	2%
Females AB	16%	61%	25%	19%	14%	9%	6%
Females C1	19%	54%	19%	30%	12%	6%	3%
Females C2	14%	39%	18%	14%	6%	5%	1%
Females DE	9%	28%	10%	5%	7%	1%	0%

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

Base: circa 4,000 GB adults aged 15+: Q1 / Q2/ Q3/ Q4 2014

Source: Ipsos MORI

PROFILE OF LINKEDIN USERS



Linkedin is a more specific social network: it is highest among 25-44 age group and more than half are social grade AB.

Consequently, Tablet ownership is nearly double the GB adult population average.

Base: circa GB adults (1,000) / All visiting / using Linkedin in last 3 months: (75) Q4 2014

Source: Ipsos MORI

Social Networking – LinkedIn

% ACCESSING LINKEDIN IN THE PAST 3 MONTHS, BY GENDER AND SOCIAL GRADE IN 2014

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	12%	8%	16%	19%	17%	10%	3%
Males AB	25%	18%	33%	36%	43%	17%	5%
Males C1	13%	9%	25%	16%	12%	8%	4%
Males C2	7%	7%	10%	10%	4%	12%	3%
Males DE	2%	4%	0%	4%	2%	1%	1%
Females	8%	10%	8%	13%	12%	8%	1%
Females AB	16%	19%	17%	22%	20%	15%	4%
Females C1	11%	19%	9%	16%	14%	10%	1%
Females C2	4%	6%	6%	4%	2%	3%	0%
Females DE	1%	3%	1%	3%	0%	0%	0%

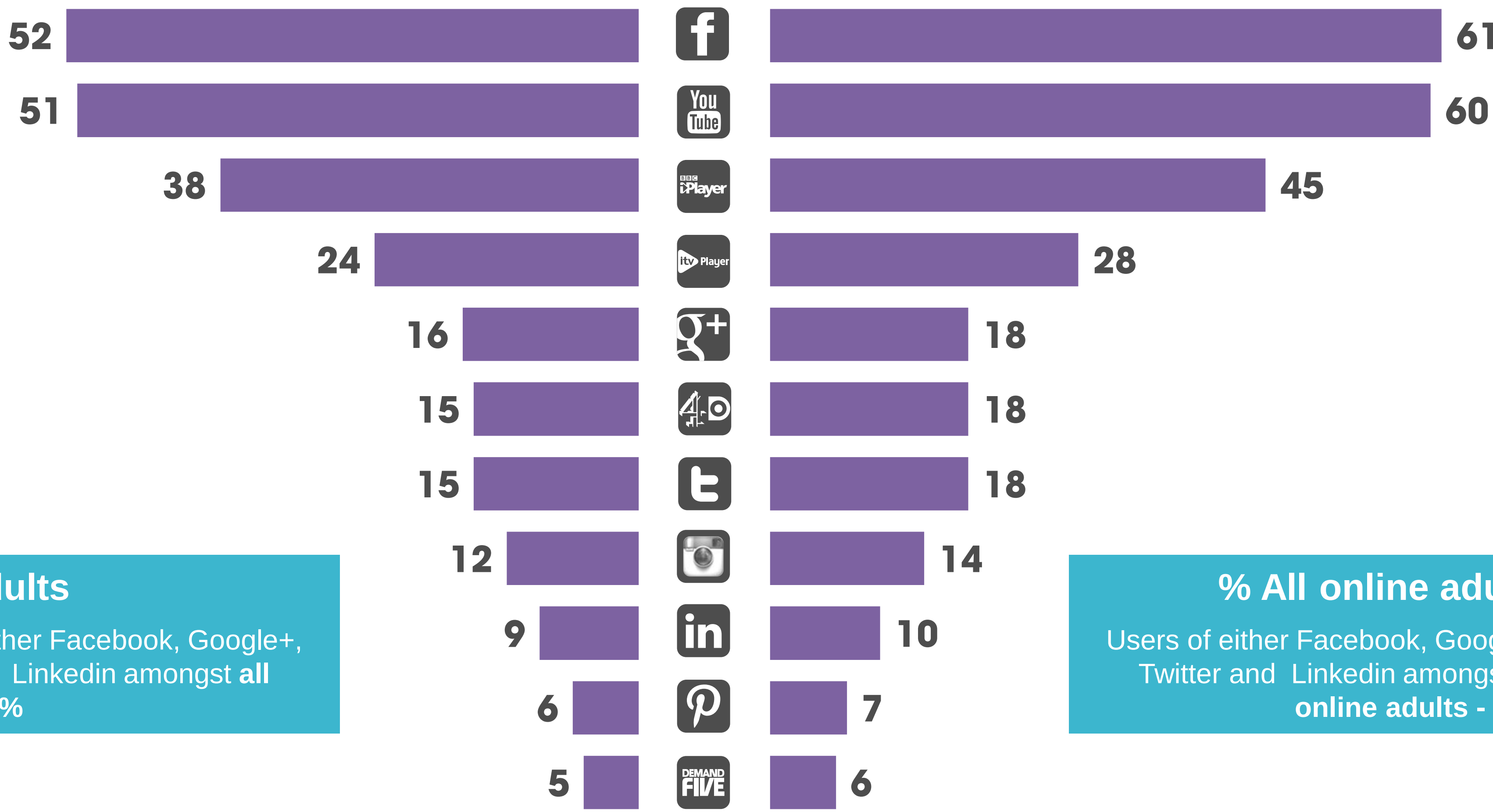
0-49% 50-79% 80-100%

Base: circa 4,000 GB adults aged 15+: Q1 / Q2/ Q3/ Q4 2014

Source: Ipsos MORI

WEBSITES VISITED OR USED IN THE LAST 3 MONTHS

% VISITED IN LAST 3 MONTHS – Quarter 3 2014



% All adults

Users of either Facebook, Google+, Twitter and Linkedin amongst **all adults - 57%**

% All online adults

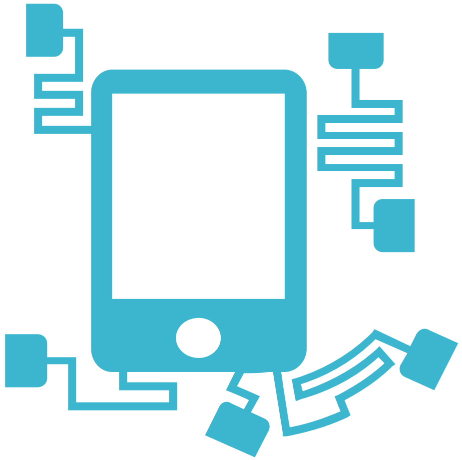
Users of either Facebook, Google+, Twitter and Linkedin amongst **all online adults - 66%**

Base: circa GB adults 1,000 adults aged 15+: Q4 2014

Base: 804 GB online adults aged 15+: Q4 2014

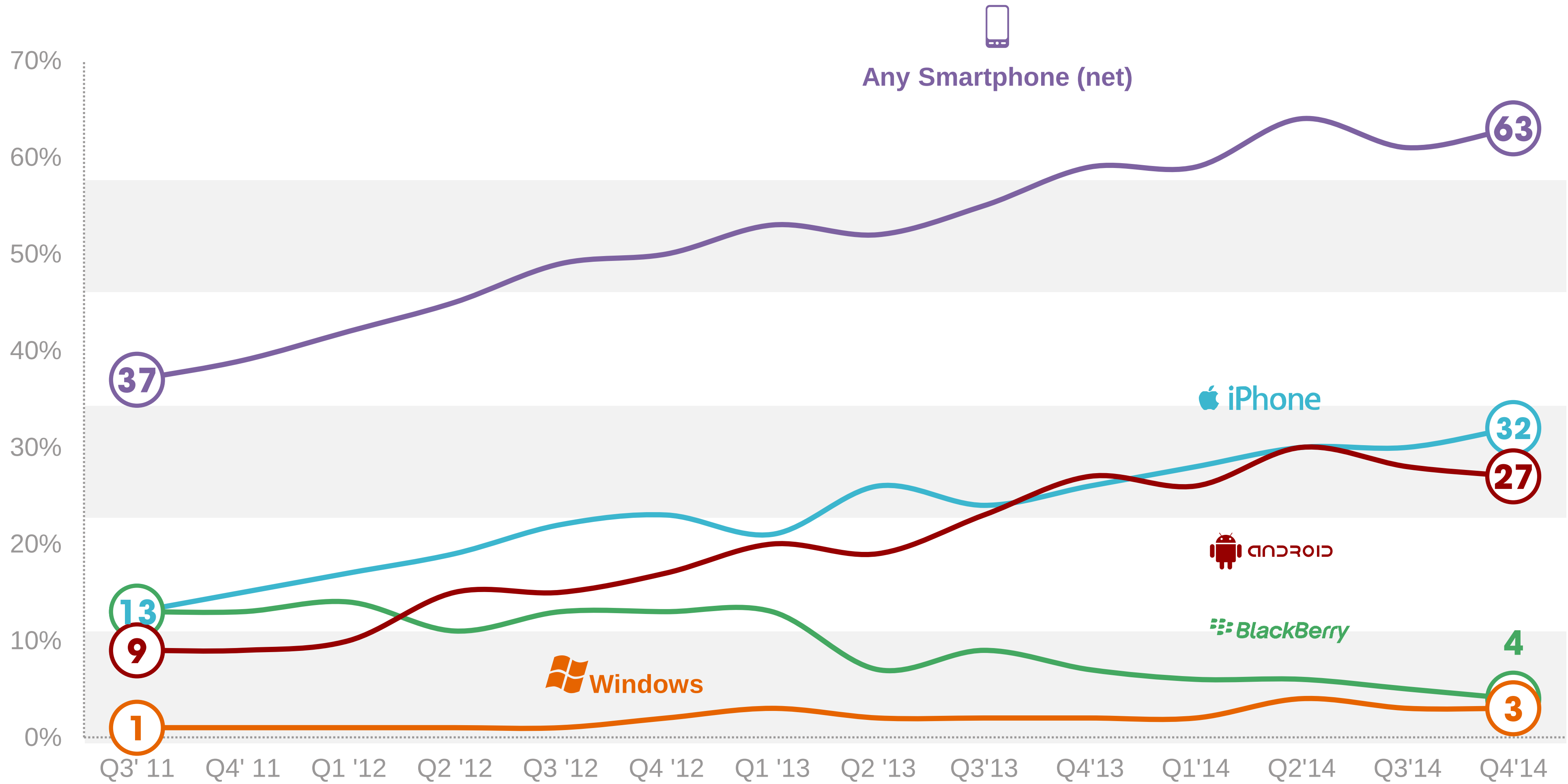
Source: Ipsos MORI

SMARTPHONE OWNERSHIP



GROWTH IN SMARTPHONES

% OWN by MANUFACTURER



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

Source: Ipsos MORI

WHO OWNS A SMARTPHONE

% OWN A SMARTPHONE BY GENDER AND SOCIAL GRADE 2014

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	64%	87%	88%	79%	66%	47%	19%
Males AB	73%	93%	96%	95%	88%	63%	27%
Males C1	69%	92%	89%	86%	58%	54%	21%
Males C2	59%	81%	84%	71%	65%	42%	15%
Males DE	51%	82%	85%	54%	44%	18%	9%
Females	60%	90%	86%	77%	65%	43%	16%
Females AB	67%	100%	92%	86%	76%	53%	27%
Females C1	65%	96%	93%	85%	68%	45%	19%
Females C2	55%	88%	76%	75%	51%	34%	5%
Females DE	52%	85%	82%	57%	54%	32%	10%

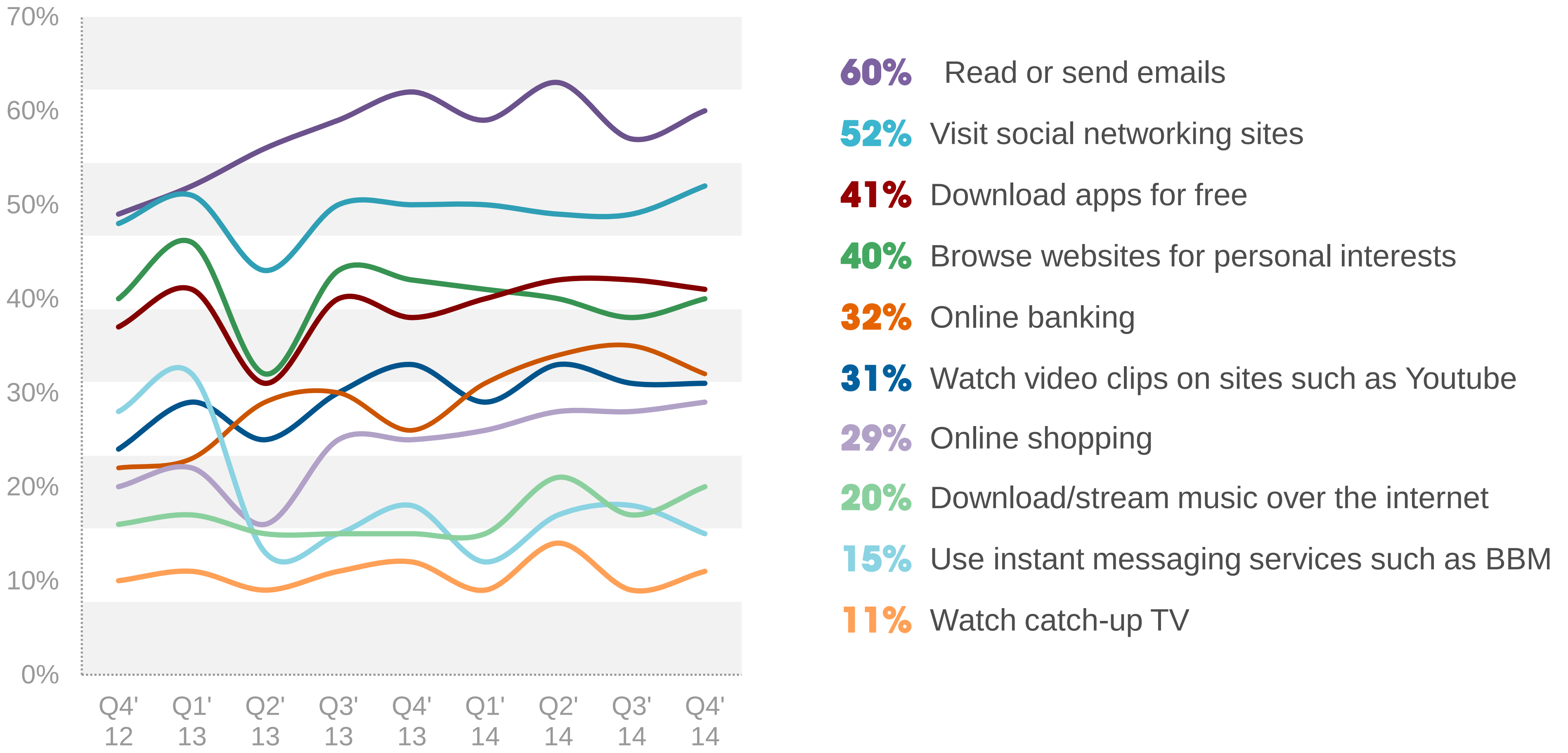
0-49% 50-69% 70-100%

Base: circa 4,000 GB adults aged 15+: Q1/Q2/ Q3/Q4 2014

Source: Ipsos MORI

CHANGING WAYS SMARTPHONE IS USED

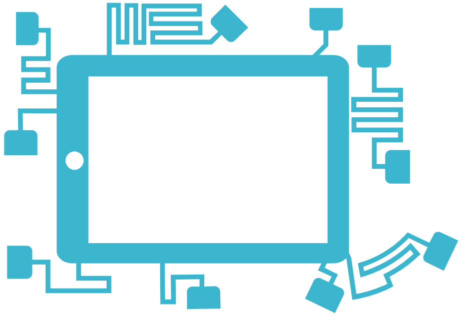
USE OF SMARTPHONE IN THE PAST 3 MONTHS



Base: circa 430-650 smartphone owners per wave

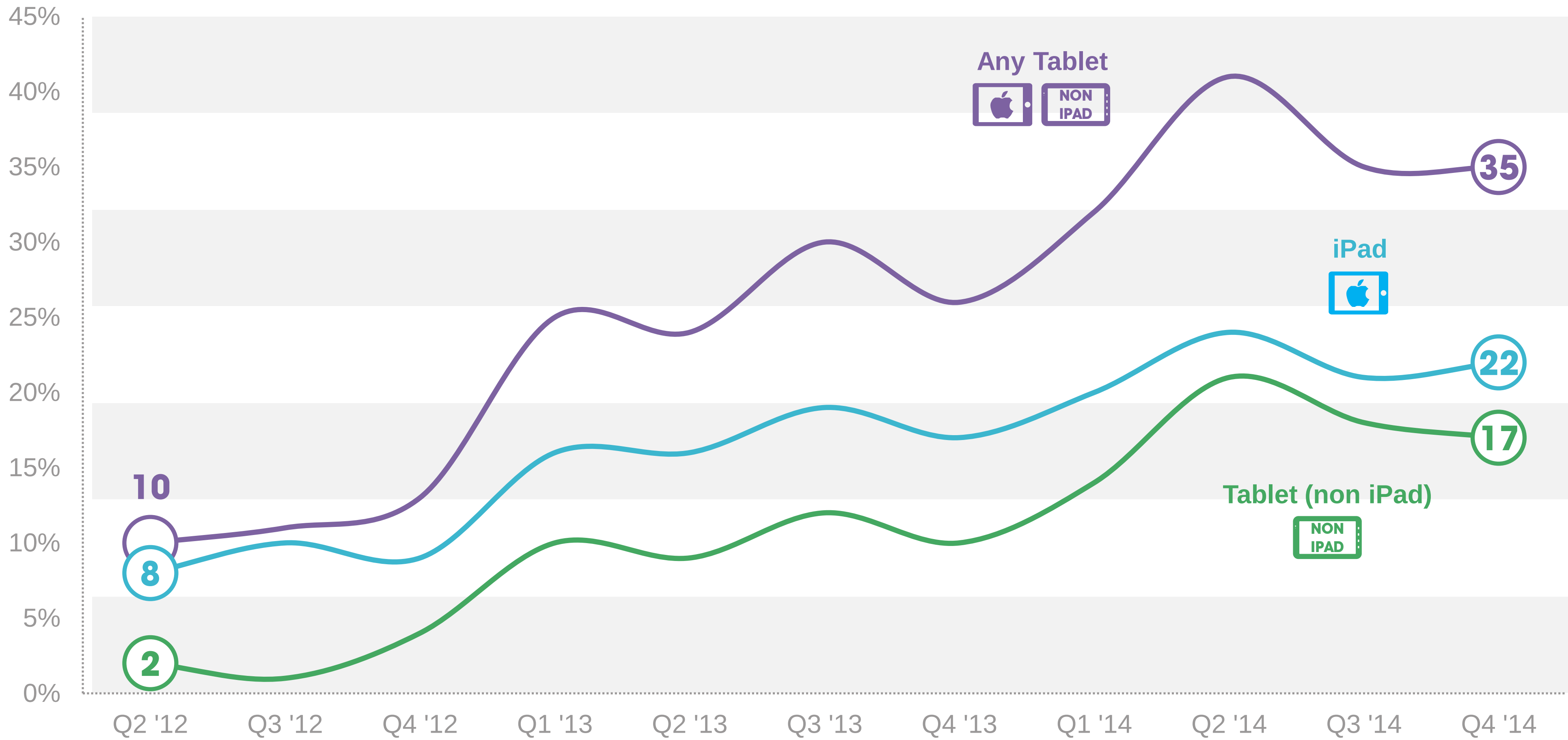
Source: Ipsos MORI

TABLET OWNERSHIP



GROWTH IN TABLETS

% OWN A TABLET IN THE HOUSEHOLD



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

Source: Ipsos MORI

WHO OWNS A TABLET

% OWN A TABLET BY GENDER AND SOCIAL GRADE ACROSS 2014

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	36%	35%	38%	47%	42%	36%	22%
Males AB	51%	47%	55%	64%	67%	46%	30%
Males C1	42%	36%	42%	58%	35%	54%	29%
Males C2	29%	36%	34%	38%	32%	20%	16%
Males DE	20%	27%	24%	19%	24%	12%	10%
Females	35%	39%	41%	50%	41%	33%	14%
Females AB	45%	47%	51%	55%	56%	43%	24%
Females C1	39%	45%	52%	56%	42%	33%	15%
Females C2	32%	41%	37%	47%	28%	33%	10%
Females DE	24%	32%	26%	40%	23%	21%	8%

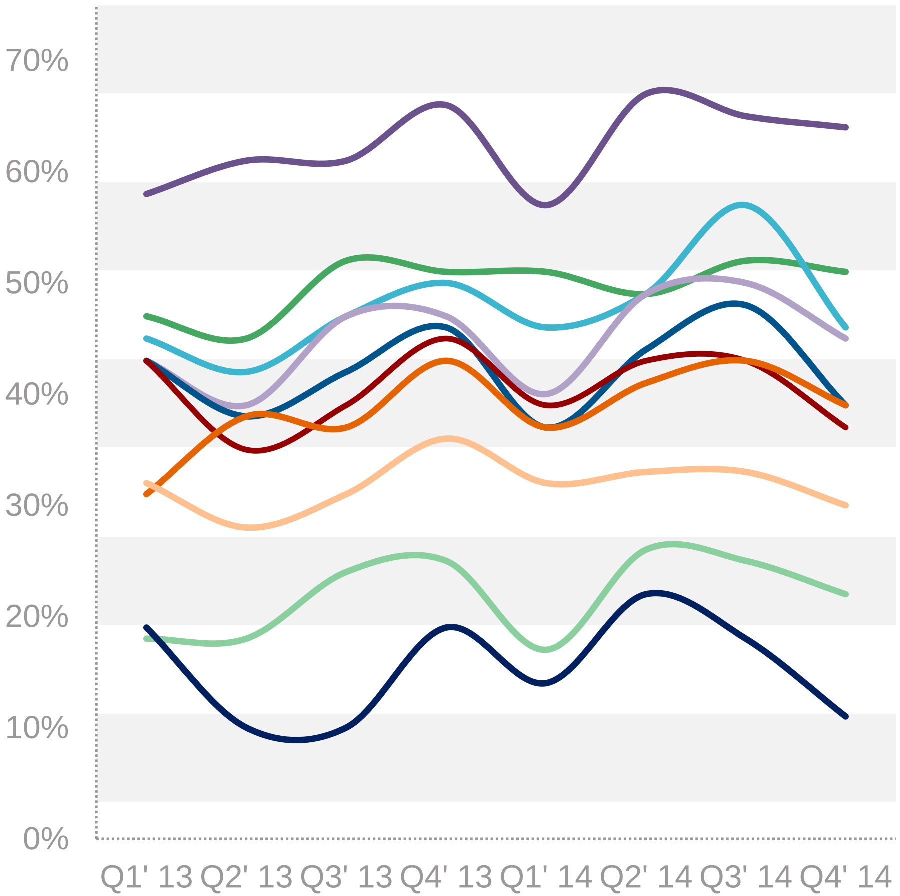
0-24% 25-49% 50-100%

Base: circa 4,000 GB adults aged 15+: Q1/ Q2/ Q3/Q4 2014

Source: Ipsos MORI

CHANGING WAYS TABLET IS USED

USE OF TABLET IN THE PAST 3 MONTHS



64% Read or send emails

51% Browse websites for personal interests

46% Visit social networking sites

45% Online shopping

39% Watch video clips on sites such as YouTube

39% Online banking

37% Download apps for free

30% Watch catch-up TV

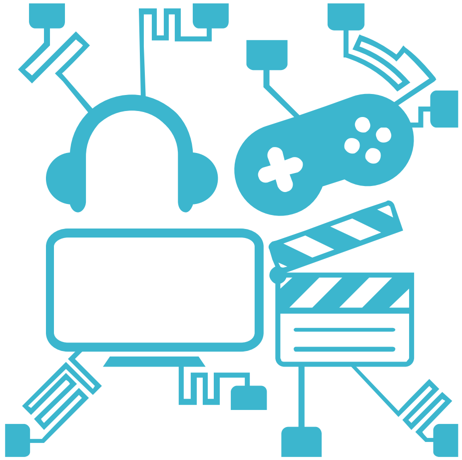
22% Download/stream music over the internet

11% Use the internet to make video calls (VOIP)

Base: circa 200 – 400 adults 15+ who own tablets

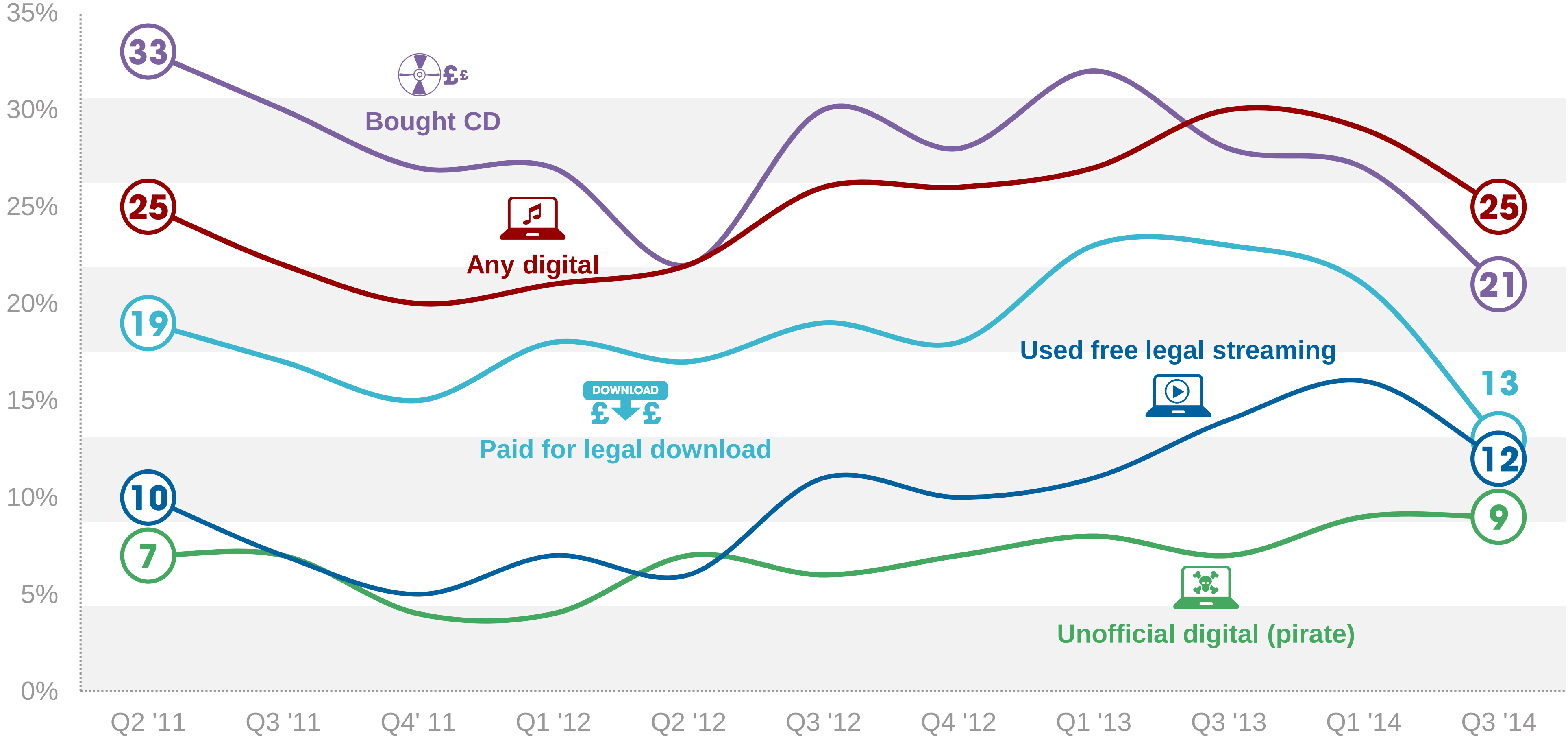
Source: Ipsos MORI

CONTENT CONSUMPTION
MUSIC / GAMES / TV / MOVIES



HOW WE CONSUME MUSIC

MUSIC CONSUMPTION

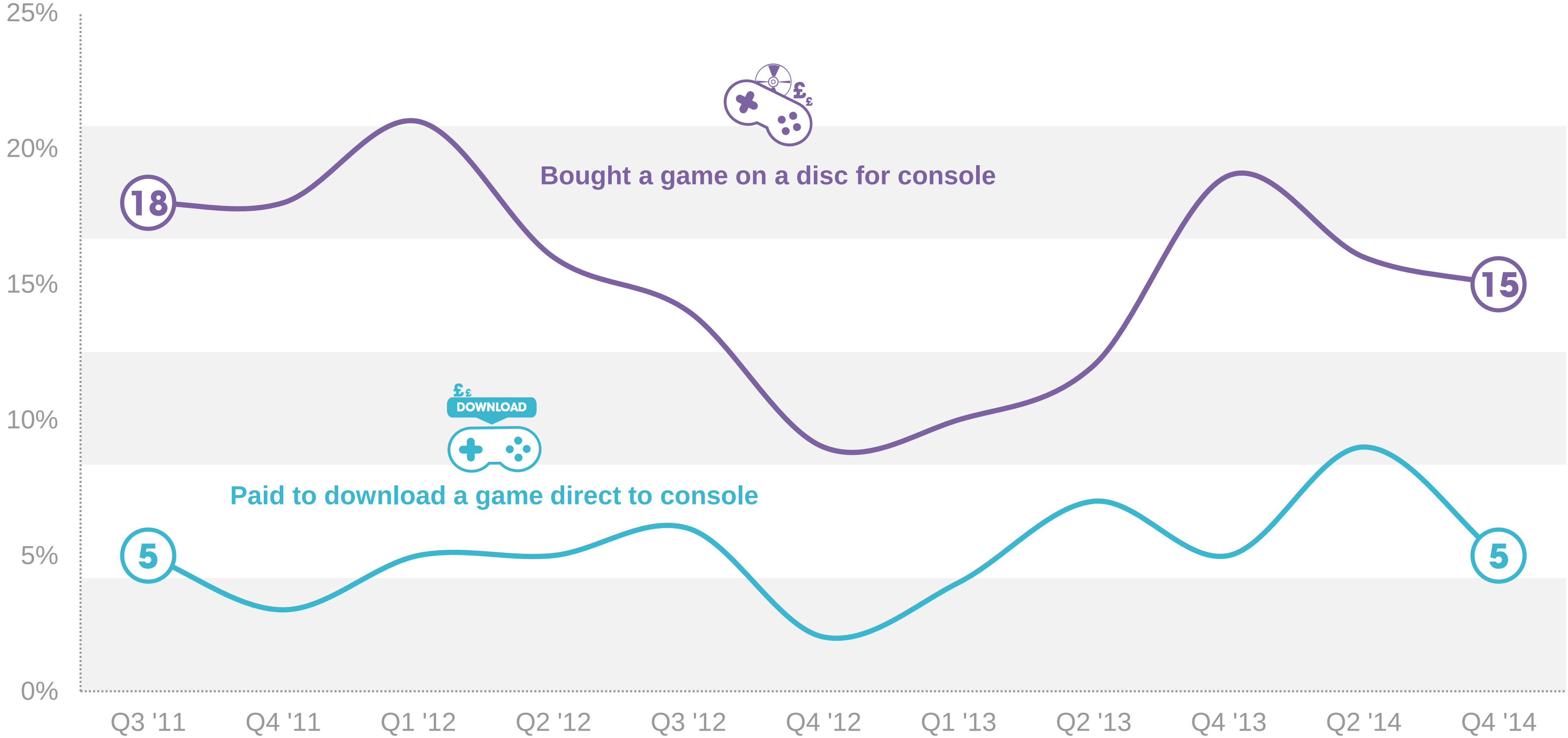


Base: circa 1,000 GB adults aged 15+ per wave / Music consumption is tracked every 6 months

Source: Ipsos MORI

HOW WE CONSUME GAMES FOR CONSOLES

GAMES CONSUMPTION

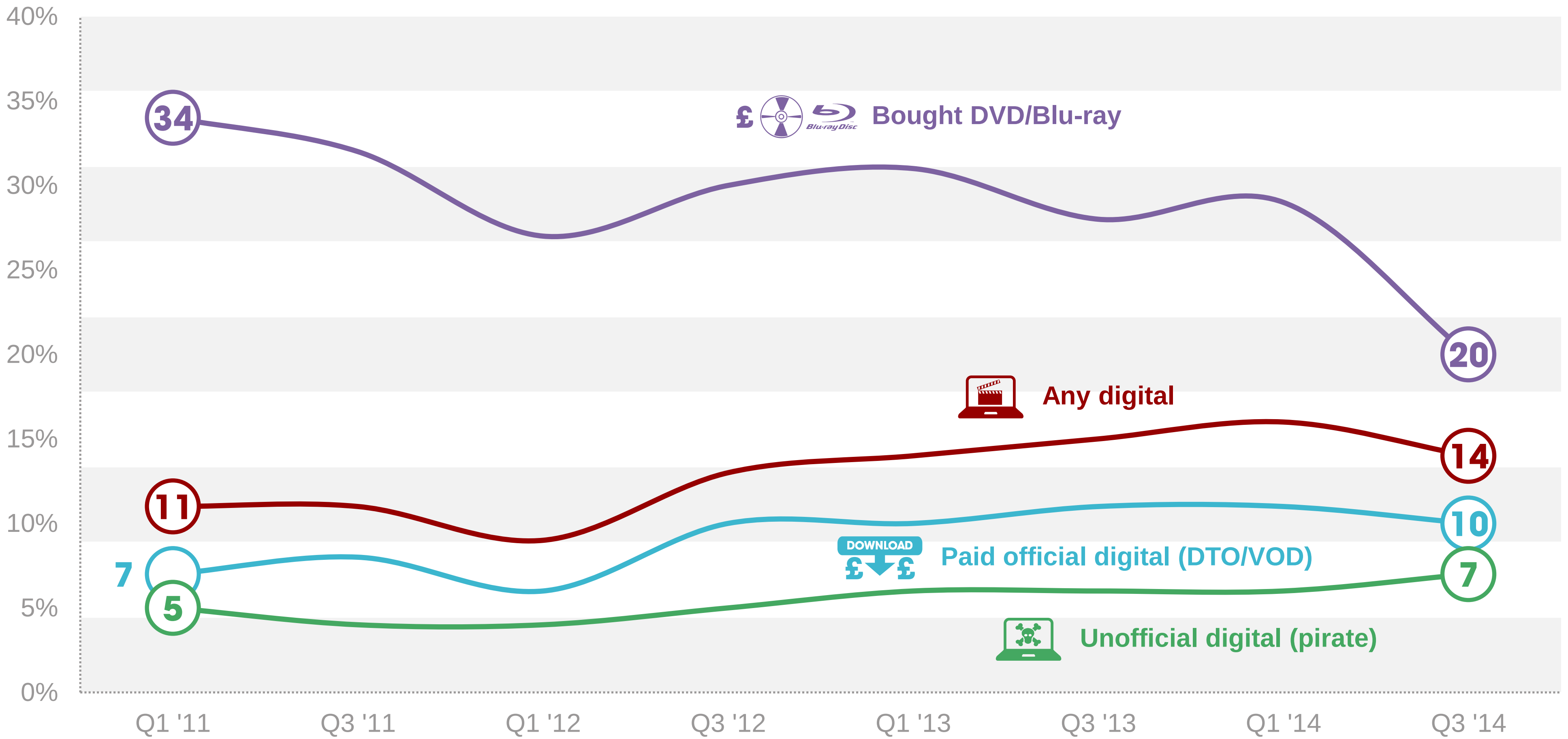


Base: circa 1,000 GB adults aged 15+ per wave / Games consumption is tracked every 6 months

Source: Ipsos MORI

HOW WE ACCESS MOVIES

MOVIE CONSUMPTION

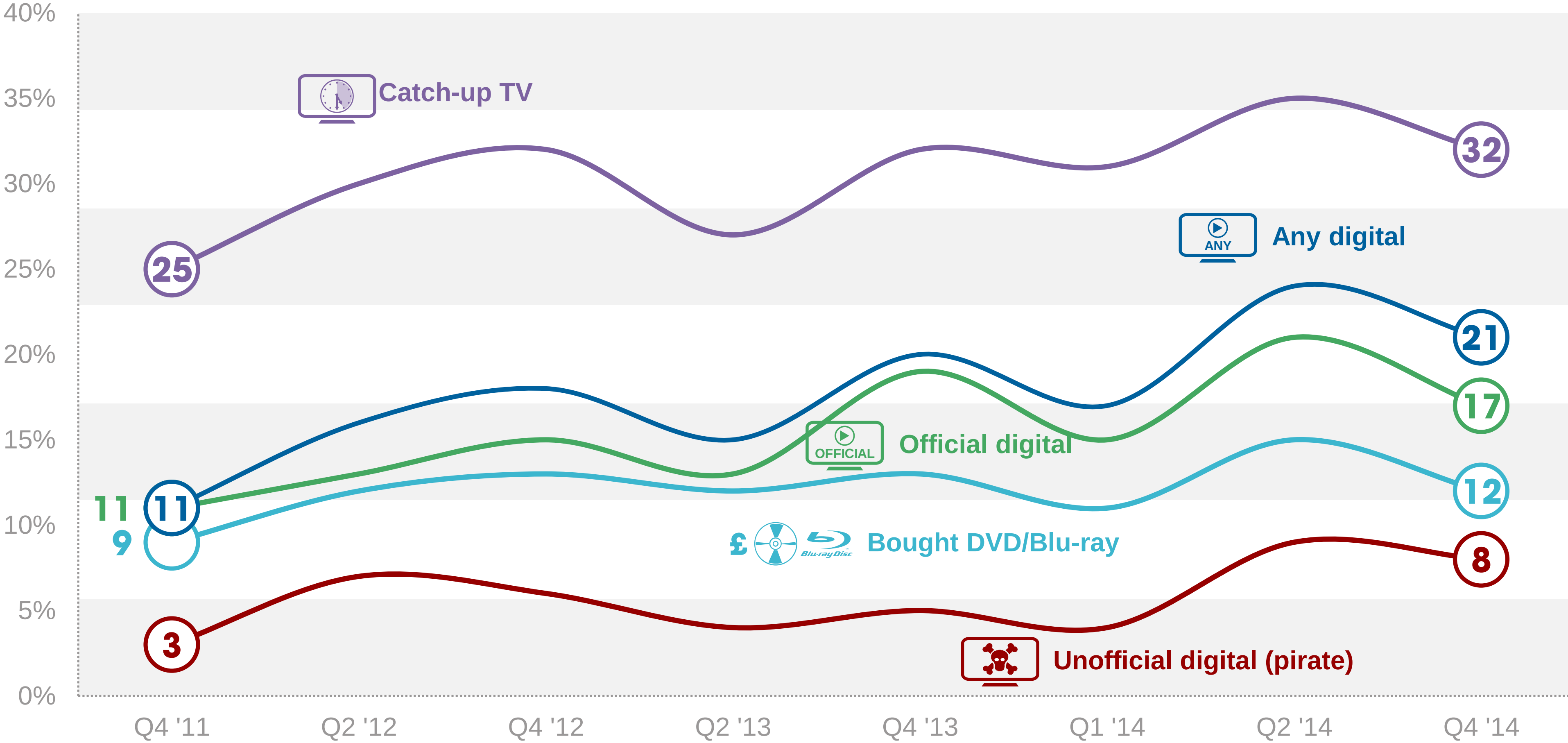


Base: circa 1,000 GB adults aged 15+ per wave / Movie consumption is tracked every 6 months

Source: Ipsos MORI

HOW WE ACCESS TV SERIES

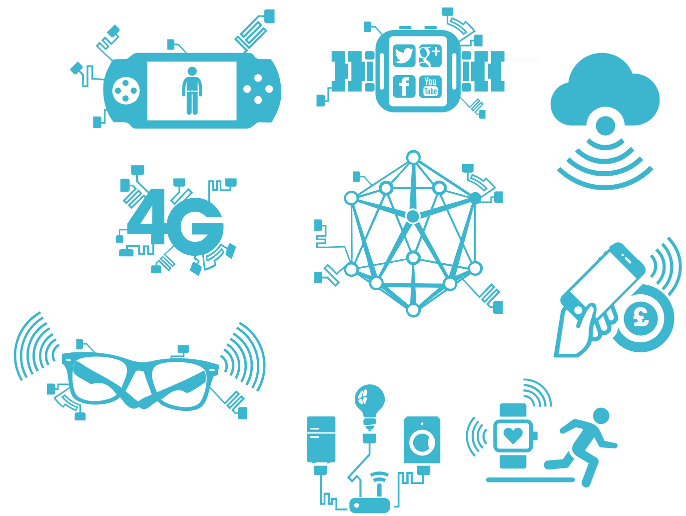
TV SERIES CONSUMPTION



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

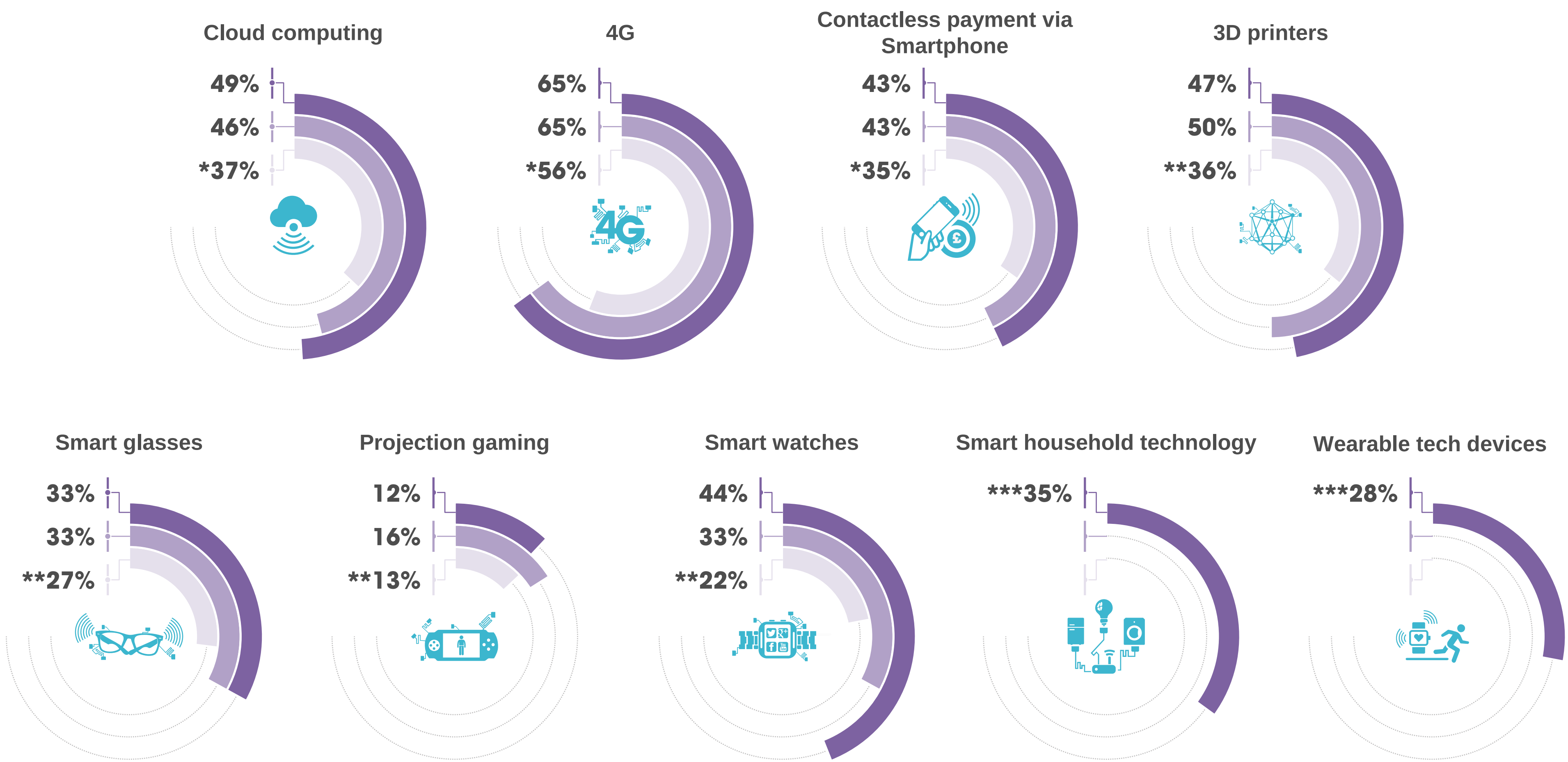
Source: Ipsos MORI

NEXT GENERATION TECH MONITOR



NEW TECHNOLOGY AND PRODUCT AWARENESS

% AWARE : Quarter 4 2014



*Q4 2012/ **Q3 2013 Q4 2013 Q4 2014/*** New category

Base: circa 1,000 GB adults aged 15+: Q4 2014

Source: Ipsos MORI

WHO IS AWARE OF THESE TECHNOLOGY & PRODUCTS

% AWARE BY AGE, GENDER AND SOCIAL GRADE : Quarter 4 2013

	Cloud computing	4G	Contactless Payment	3D Printers	Smart Glasses	Projection Gaming	Smart Watches	Smart HH Tech	Wearable tech devices
All adults	49	65	43	47	33	12	44	35	28
Males	57	71	47	58	43	19	52	42	38
Females	42	58	40	38	23	6	38	27	19
15-34	52	81	48	54	42	24	52	36	32
35+	48	57	41	45	28	7	41	34	27
ABC1	60	73	53	58	43	13	53	46	39
C2DE	37	54	32	35	21	11	34	21	16

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

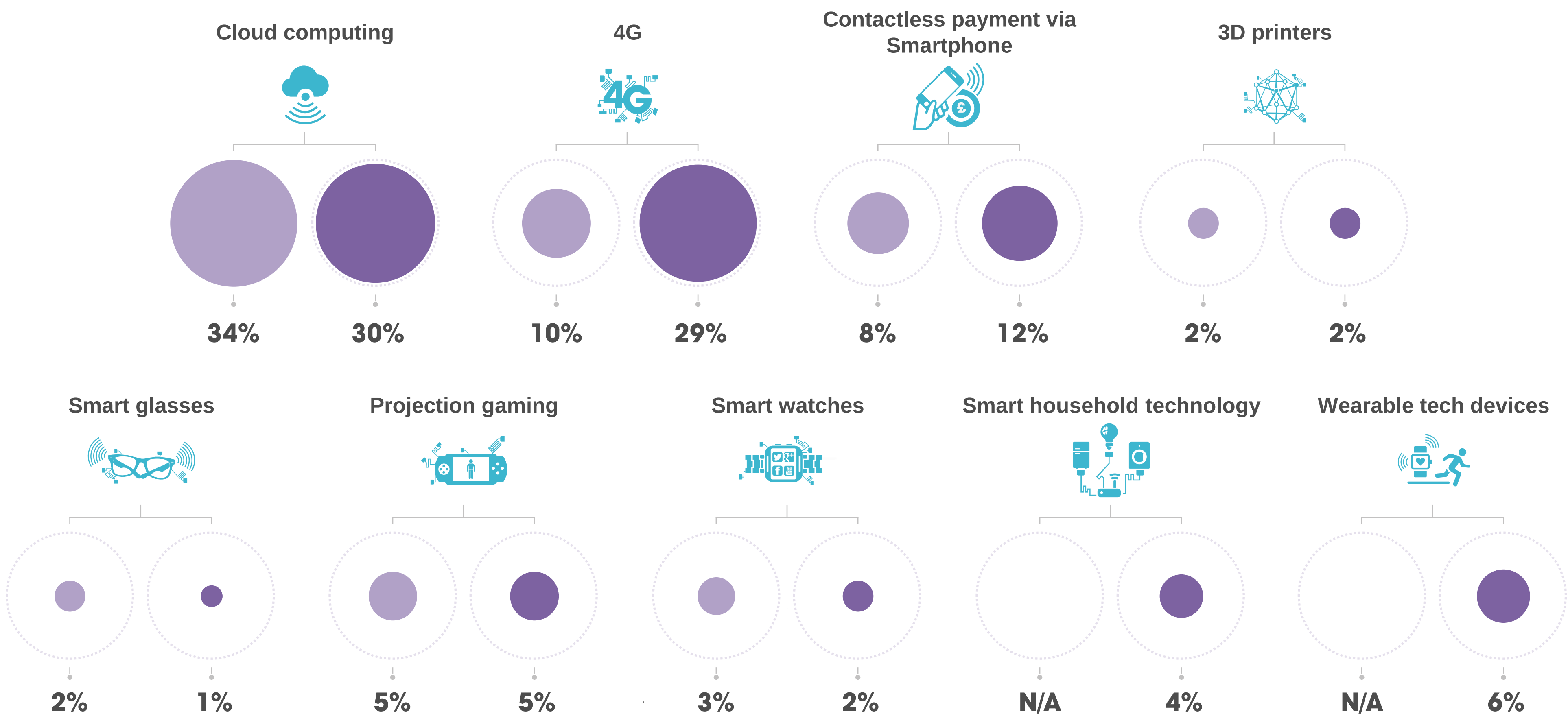
Base: circa 1,000 GB adults aged 15+: Q4 2013

Source: Ipsos MORI

NEW TECHNOLOGY AND PRODUCT AWARENESS

% USE/ OWN (AMONGST AWARE): Quarter 4 2014

Q4 2013 Q4 2014



Base: All GB adults aware of each product:

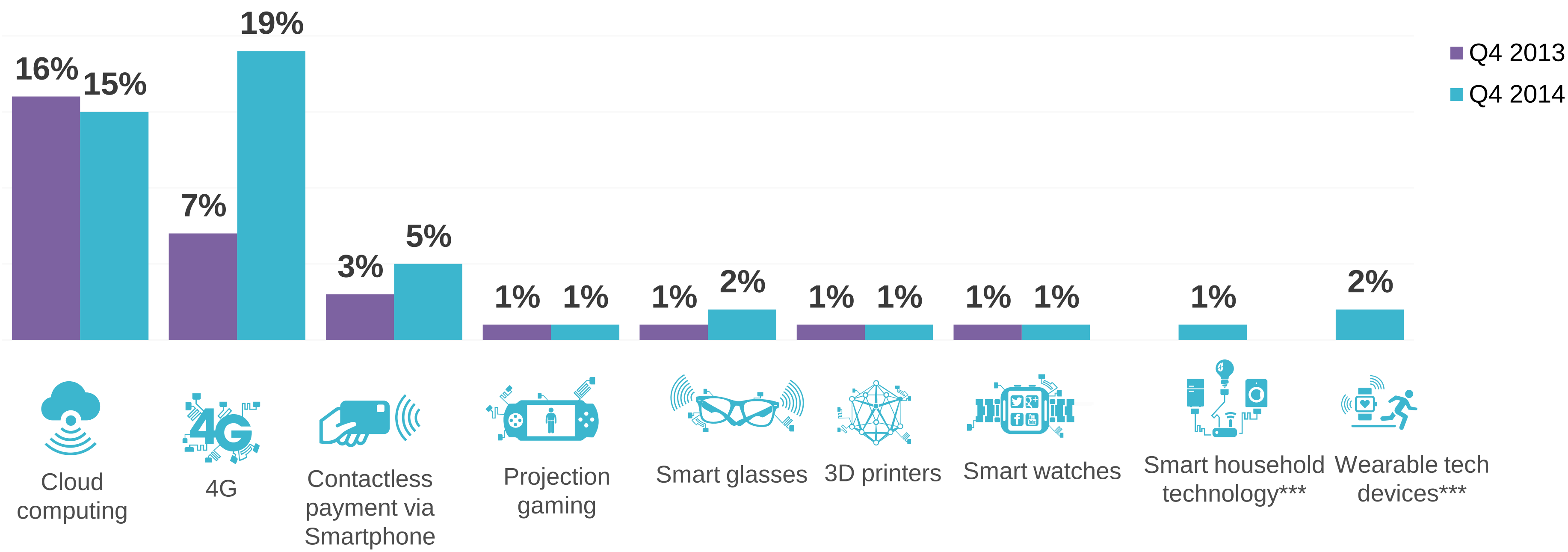
Q4 2013 Cloud Computing = 454, 4G = 640, Contactless Payment = 424, 3D Printers = 489, Smart Glasses = 319, Projection Gaming=155, Smart watches=322

Q4 2014 Cloud Computing = 449, 4G = 647, Contactless Payment = 386, 3D Printers = 476, Smart Glasses = 285, Projection Gaming=98, Smart watches=395, Smart HH tech =304, Wearable tech =249

Source: Ipsos MORI

NEW TECHNOLOGY AND PRODUCT AWARENESS

% USE/ OWN AMONGST GB ADULTS: Quarter 4 2014



*** New category

Base: circa 1,000 GB adults aged 15+: Q4 2013/ Q4 2014

Source: Ipsos MORI

BARRIERS TO SMARTWATCH OWNERSHIP

% AWARE of Smart watches but don't have one

98%
Of those aware, don't own one

	Total	Male	Female
I don't have a need for them	47%	51%	41%
They are expensive	24%	25%	22%
I see them as gimmicks	18%	20%	16%
They don't suit me	7%	10%	4%
I don't understand what they are for	4%	3%	6%
I don't have a smartphone	4%	5%	3%
I don't know how to use them	4%	2%	6%
I prefer to wait and see what other people think about these devices	4%	4%	4%

4 in 10 are aware of Smartwatches but this hasn't been converted into ownership with consumers unsure of the benefits and relevance of the product.

Base: All GB adults aware of Smart watches = 395, GB adults aware of Smart watches but don't use it = 386

Source: Ipsos MORI

TECH TRACKER TECHNICAL DETAILS

Ipsos MORI interviewed a quota sample of **987 adults aged 15+ in GB.**

The latest interviews were carried out face to face **7th – 14th November 2014.**

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.

FURTHER INFORMATION

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