Ipsos MediaCT
The Media, Content and Technology Research Specialists

Ipsos

TECH TRACKER

QUARTERLY RELEASE: Q1 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 1 2014 (Field in February)

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
- Technology and children

HEADLINES

Internet usage

The proportion of adults accessing the internet is at 84%, with 53% now accessing via a mobile.

The top activities online remain: accessing email (79%), browsing for information on hobbies (73%), researching products and services (64%) and online shopping (59%).

Connected home

The percentage of households with connected TV has risen to 13% of GB adults.

37% of GB adults have at least one of the latest generation games consoles in their household which has generally remained the same over the last wave, PlayStation game consoles ownership including with new generation PS4 have slightly increased.

Social networking

54% of GB adults access social networking sites, 30% access via a a Smartphone. 15% access via a Tablet and 2% access via an internet TV.

50% of all adults have used Facebook in the past 3 months. 15% have used Twitter. 16% used Google+ and 11% have used LinkedIn

Smartphones

Smartphone ownership is 59%. Ownership of Android Smartphones is at 26%, and iPhone ownership has increased beyond this at 28%. BlackBerry has decreased to 6% and Windows has remained roughly at 2%.

Tablets

Tablet ownership has risen to almost 1 in 3 households, of which two third is an iPad.

E-mailing is the top activity carried out on this device, though it is becoming more common to carry out many other activities on this device as well - including online banking, social networking, watching catch-up TV and video calling.

Music/games & movies/TV

There has been a shift away from downloading purchased games straight to console and towards purchasing a physical console game disc. Conversely, there is a greater proportion of digital television consumption than physical.

Technology and children

Almost two thirds of parents feel that kids are spending the right amount of time on traditional childhood activities such as watching TV and spending time with friends. However, this figure drops for newer activities such as using a mobile phone (30%) and using a tablet (34%).

The most popular activities children engage in online are watching online clips (39%), playing games (38%) and general web browsing (32%).

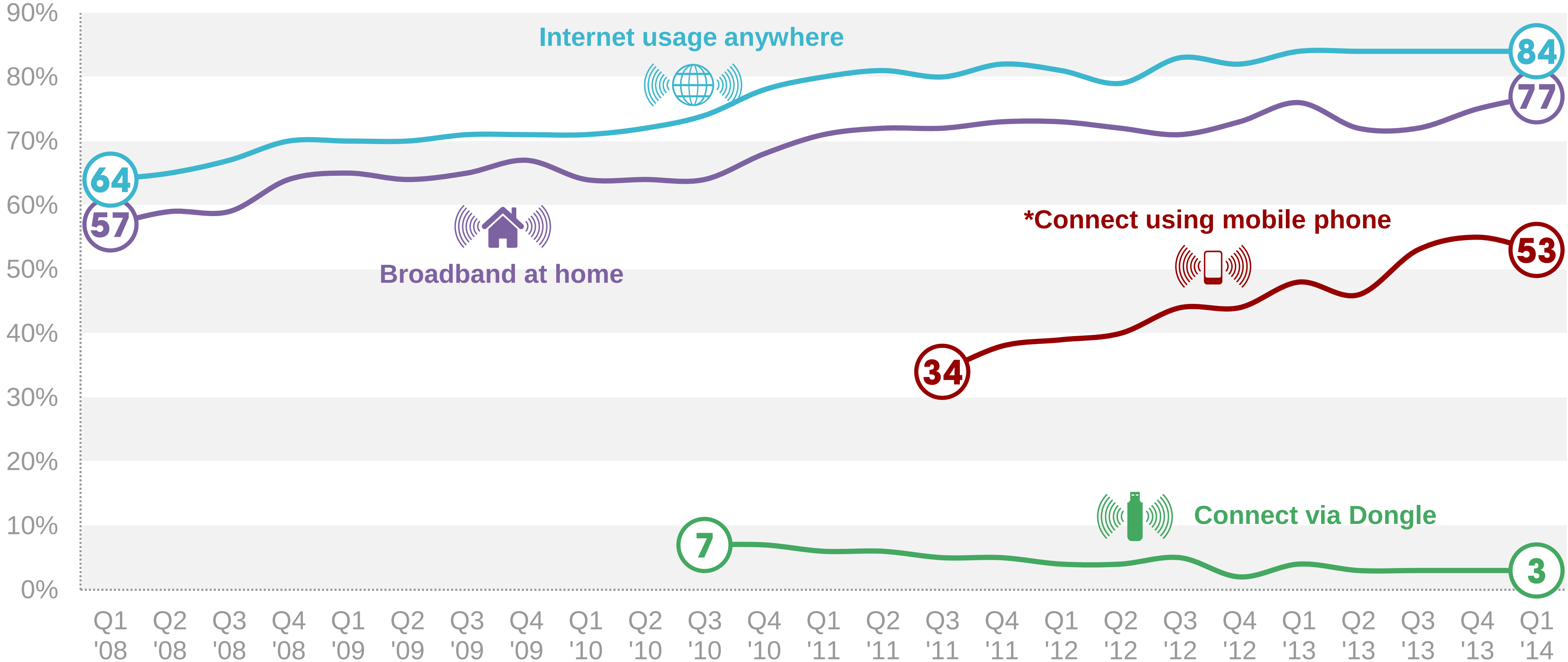
Reading eBooks (56%), general web browsing (46%), and e-mailing (34%) are considered to be the most beneficial online activities for children whereas social networking (47%), video games (42%) and watching online clips (32%) are thought of as the most harmful.

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	87	97	97	94	88	82	63
Males AB	96	100	100	100	98	97	86
Males C1	93	100	98	97	96	90	75
Males C2	83	97	97	98	84	82	43
Males DE	71	93	94	74	69	52	37
Females	82	93	94	96	93	80	50
Females AB	94	100	99	99	100	93	80
Females C1	89	98	98	98	96	88	65
Females C2	77	92	92	91	91	82	34
Females DE	66	88	88	91	76	47	24

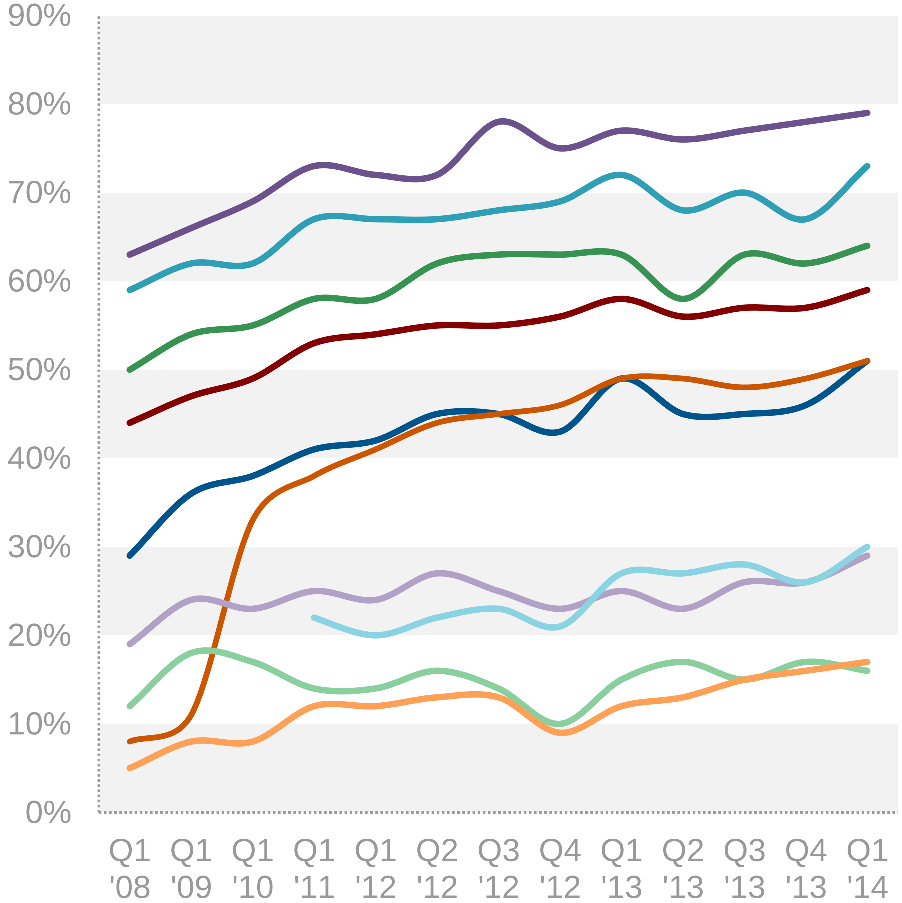
0-49% 50-79% 80-100%

Base: circa 4,000 GB adults aged 15+: Q2 / Q3 / Q4 2013 / Q1 2014

Source: Ipsos MORI

CHANGING WAYS THE INTERNET IS USED

% USE OF THE INTERNET IN THE PAST 3 MONTHS



79% Emails
73% Visit sites for info personal interests
64% Visit sites for info on products thinking of buying
59% Visit sites to buy on products online
51% Social networking
51% Check bank account/other financial holdings
30% Download/stream TV
29% Download/stream music
17% Download/stream movies
16% Play video games online

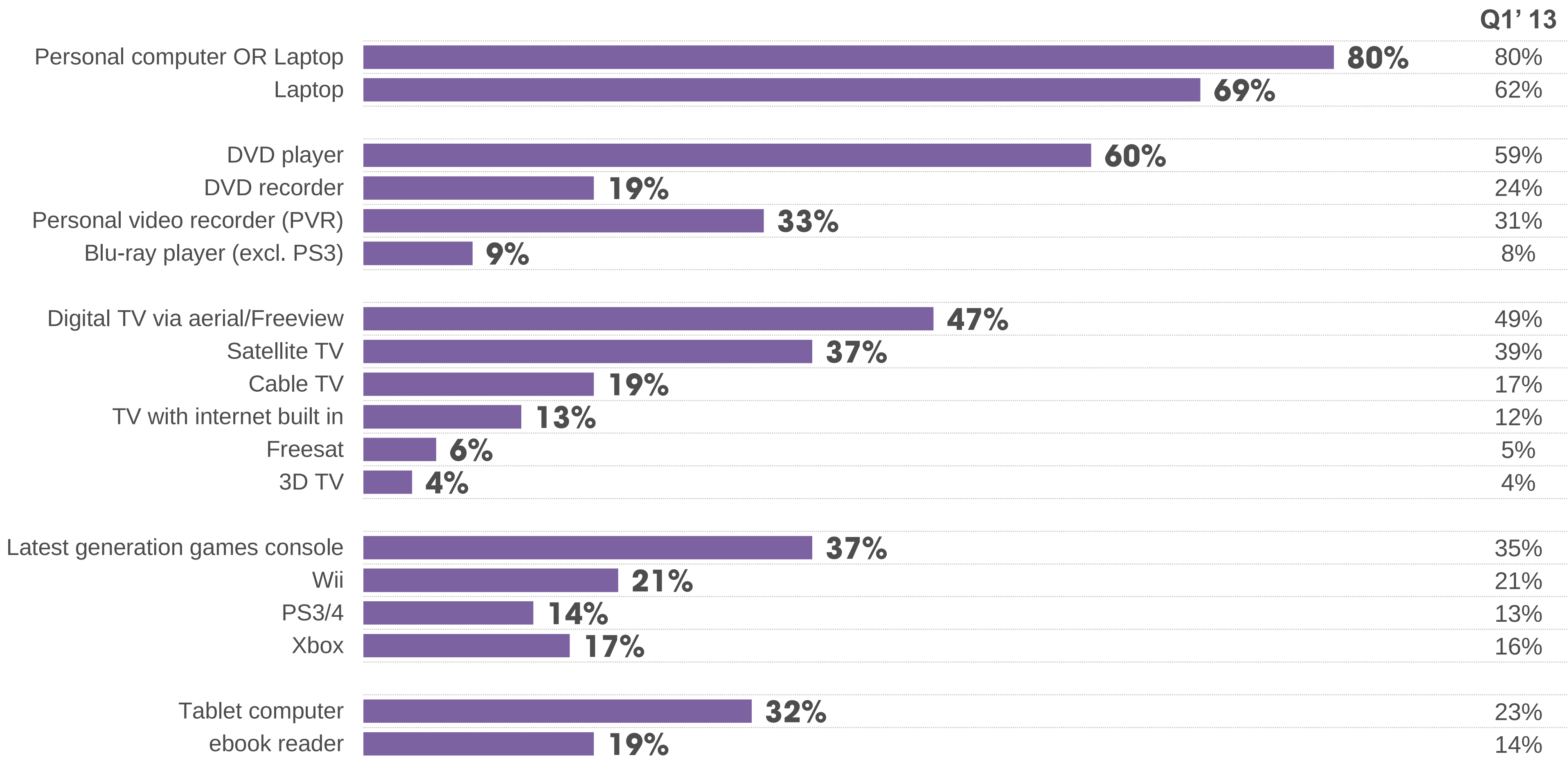
Base: circa 2,000 interviews per wave until Quarter 1 2010, circa 1,000 GB adults aged 15+ per wave thereafter

Source: Ipsos MORI

CONNECTED HOME

EQUIPMENT IN THE HOME

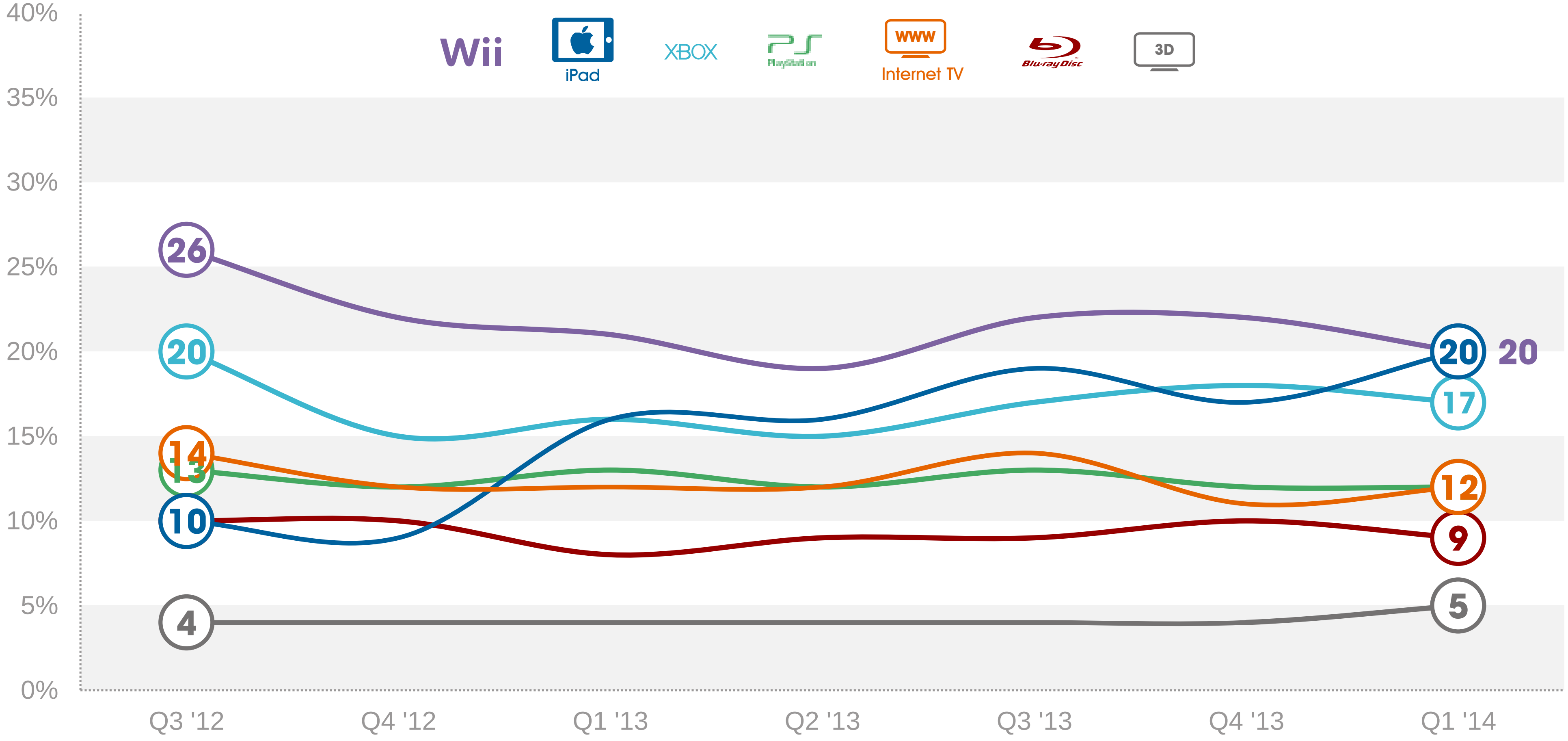
WHICH OF THE FOLLOWING DO YOU OWN/HAVE IN YOUR HOUSEHOLD?: Quarter 1 2014



Base: circa 1,000 GB adults aged 15+: Quarter 1 2014 *Xbox (Xbox360/ XboxOne) Source: Ipsos MORI

TRENDS IN EQUIPMENT OWNERSHIP IN THE HOME

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



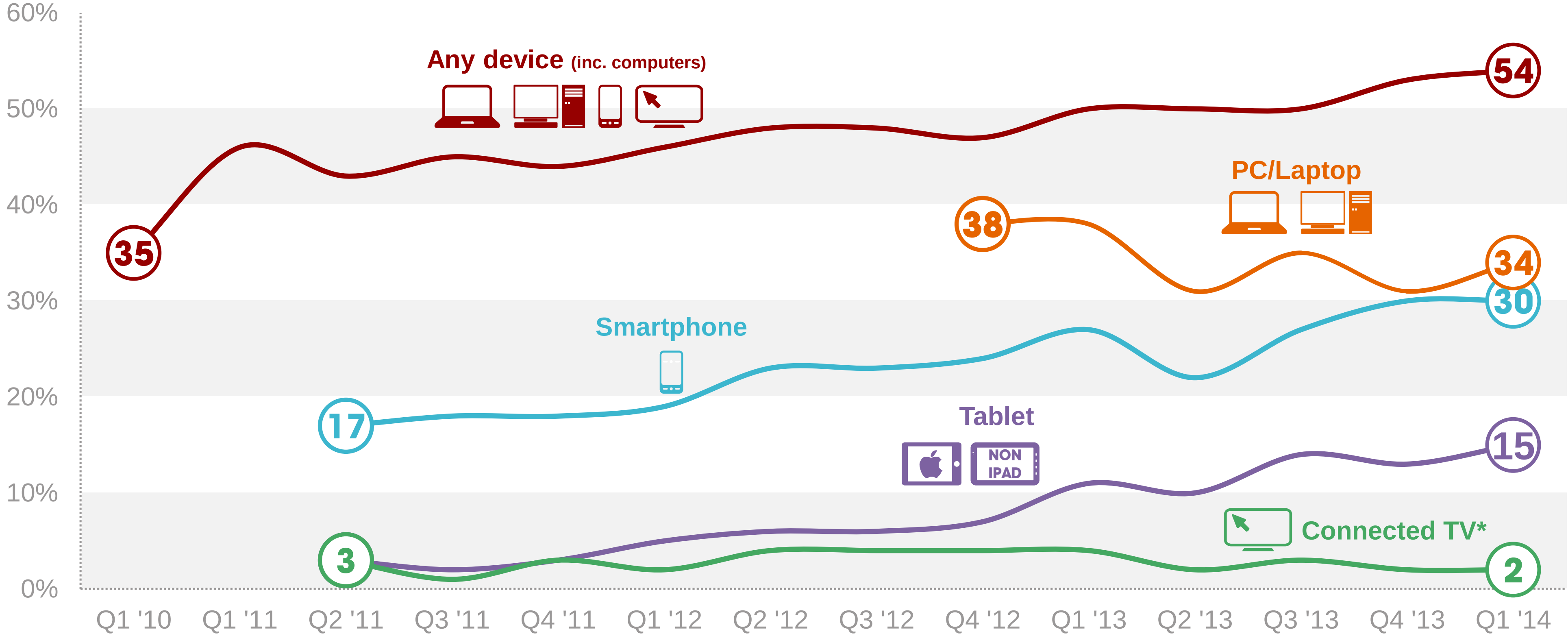
Base: circa 1,000 GB adults aged 15+ per wave

Source: Ipsos MORI

SOCIAL NETWORKING

TRENDS IN VISITING SOCIAL NETWORKING SITES

% VISITING SOCIAL NETWORKING SITES



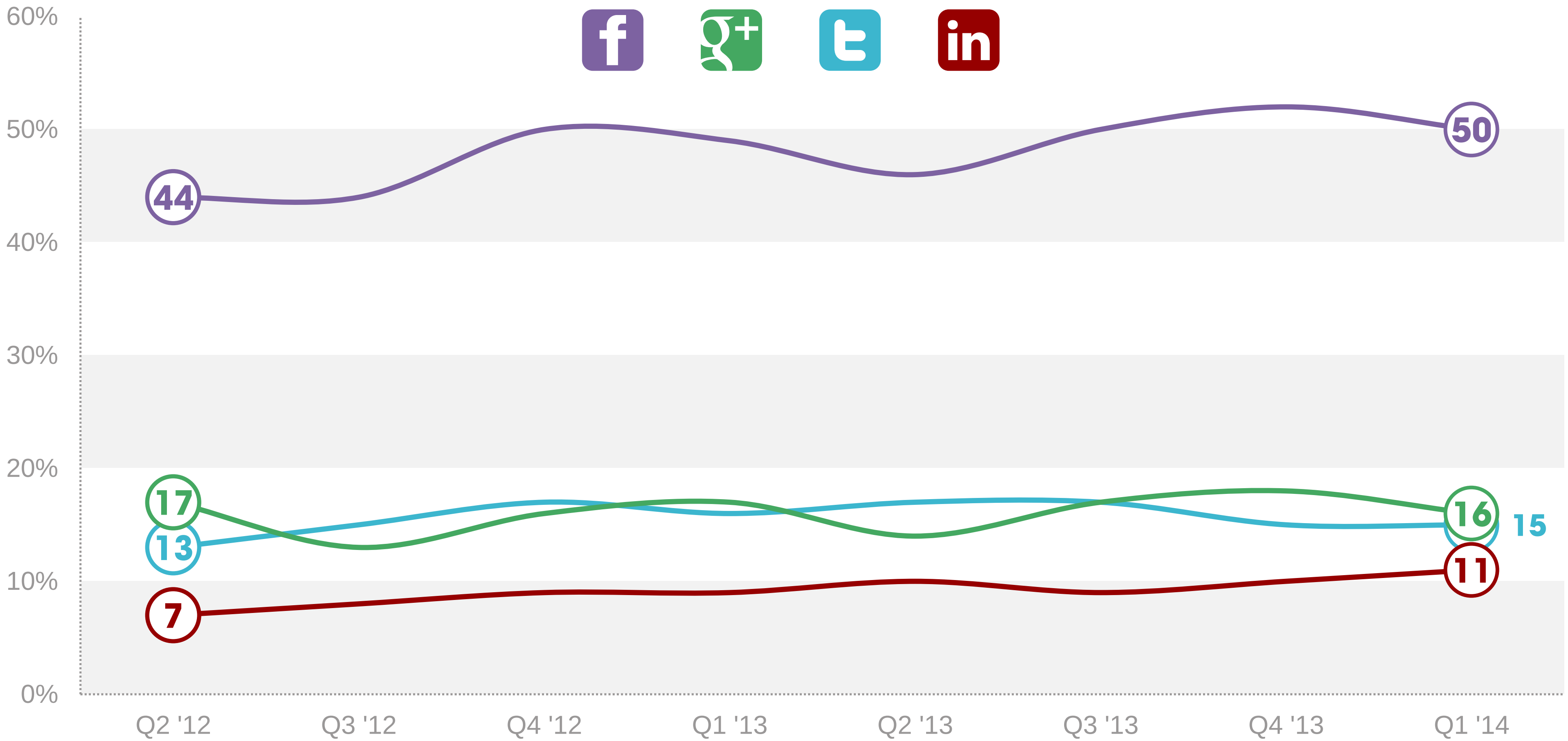
Connected TV* - Games console, web enabled TVs and PCs connected to a TV

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

ALL ADULTS		Facebook users
49%	Male	48
51%	Female	52
15%	15-24	25
17%	25-34	22
16%	35-44	18
17%	45-54	18
35%	55+	17
27%	AB	28
27%	C1	29
22%	C2	22
24%	DE	21
59%	Own Smartphone	80
32%	Own Tablet	42

The profile of Facebook users when compared to the national population is younger. Ownership of Smartphone and Tablet is also higher amongst Facebook users in comparison to the national population.

Base: circa GB adults (1,000) / All visiting / using Facebook in last 3 months (487) : Q1 2014

Source: Ipsos MORI

Social Networking – Facebook

% ACCESSING FACEBOOK IN THE PAST 3 MONTHS, BY GENDER AND SOCIAL GRADE IN 2013/2014

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	49	81	72	55	44	30	14
Males AB	51	96	82	63	55	33	18
Males C1	56	86	79	61	43	30	17
Males C2	46	77	62	44	46	33	7
Males DE	42	69	66	44	28	22	12
Females	51	81	74	63	53	37	15
Females AB	53	94	81	62	54	41	23
Females C1	55	88	74	64	54	44	15
Females C2	50	83	63	68	56	31	11
Females DE	48	71	78	60	48	25	11

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

Base: circa 4,000 GB adults aged 15+: Q2 / Q3 / Q4 2013 / Q1 2014

Source: Ipsos MORI

PROFILE OF GOOGLE+ USERS

ALL ADULTS		
49%	Male	53
51%	Female	47
15%	15-24	23
17%	25-34	19
16%	35-44	22
17%	45-54	14
35%	55+	22
27%	AB	32
27%	C1	32
22%	C2	20
24%	DE	15
59%	Own Smartphone	79
32%	Own Tablet	49

In contrast to Facebook, Google+ has captured fewer users aged 15-34, but more in the 35-44 age group.

Smartphone penetration is now on par with Facebook and tablet ownership is slightly higher at 49%.

Base: circa GB adults (1,000) / All visiting / using Google+ in last 3 months (155) : Q1 2014

Source: Ipsos MORI

Social Networking – Google+

% ACCESSING GOOGLE+ IN THE PAST 3 MONTHS, BY GENDER AND SOCIAL GRADE IN 2013/2014

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	17	23	23	21	16	12	5
Males AB	17	32	21	20	21	13	9
Males C1	20	24	29	28	16	16	4
Males C2	17	24	25	20	15	12	3
Males DE	11	17	16	17	8	6	3
Females	16	26	23	20	14	12	5
Females AB	15	43	12	17	14	11	11
Females C1	19	31	30	18	16	15	5
Females C2	17	21	21	26	16	18	3
Females DE	13	18	23	23	11	6	1

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

Base: circa 4,000 GB adults aged 15+: Q2 / Q3 / Q4 2013 / Q1 2014

Source: Ipsos MORI

PROFILE OF TWITTER USERS

ALL ADULTS		
49%	Male	57
51%	Female	43
15%	15-24	34
17%	25-34	17
16%	35-44	23
17%	45-54	15
35%	55+	11
27%	AB	36
27%	C1	27
22%	C2	23
24%	DE	13
59%	Own Smartphone	90
32%	Own Tablet	52

Twitter users are young : over half of them are aged under 35.

They are also more likely to be AB or C1 social grade and very mobile: 90% of them own a Smartphone, 52% a Tablet.

Base: circa GB adults (1,000) / All visiting / using Twitter in last 3 months (151) : Q1 2014

Source: Ipsos MORI

Social Networking – Twitter

% ACCESSING TWITTER IN THE PAST 3 MONTHS, BY GENDER AND SOCIAL GRADE IN 2013/2014

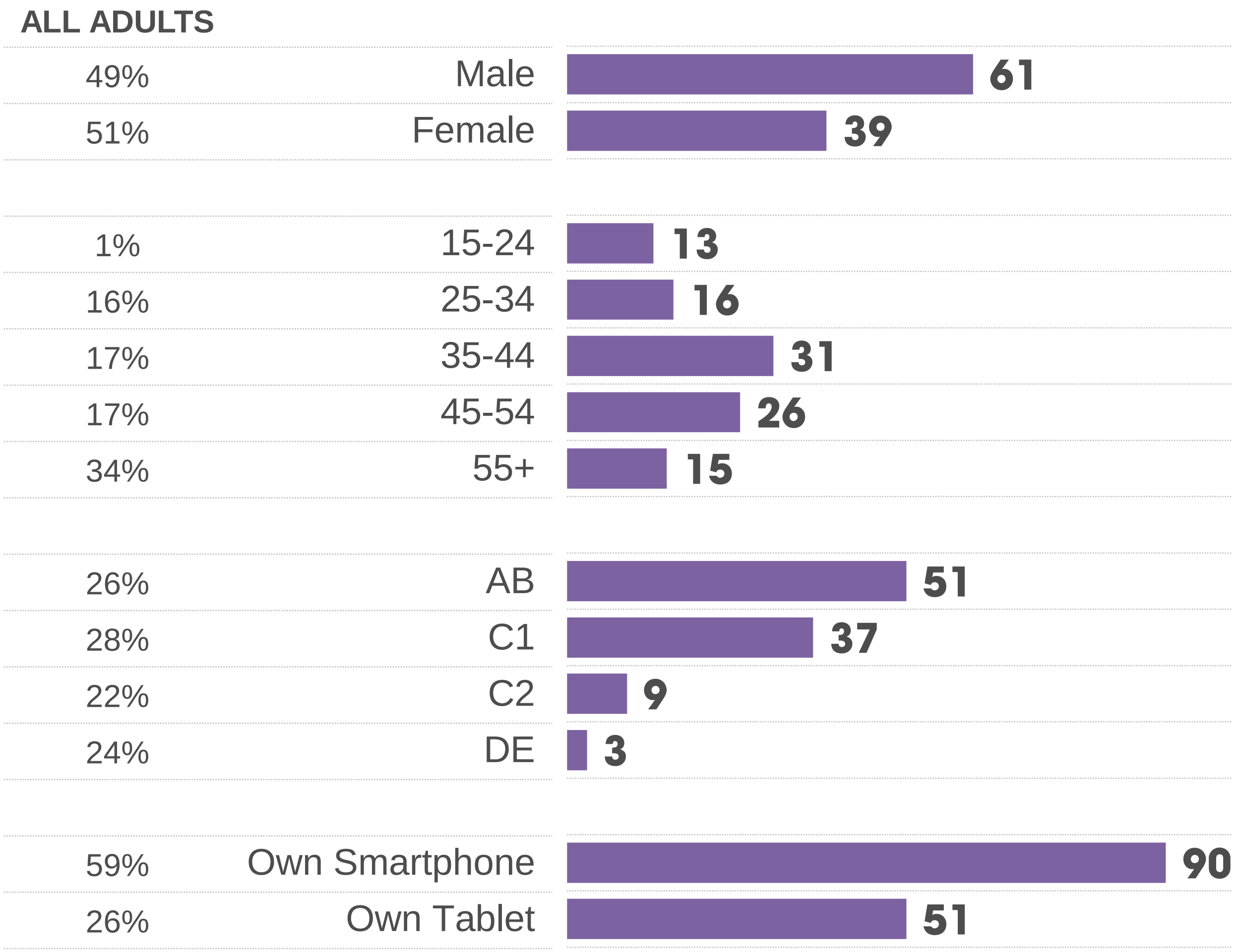
	All	15-24	25-34	35-44	45-54	55-64	65+
Males	17	33	25	27	11	8	2
Males AB	23	45	37	36	18	15	5
Males C1	22	38	34	36	10	3	1
Males C2	15	26	20	22	9	10	-
Males DE	8	25	10	5	3	3	-
Females	14	35	21	18	9	8	2
Females AB	15	51	18	18	12	10	6
Females C1	17	44	26	20	5	12	1
Females C2	13	32	14	21	10	7	2
Females DE	11	23	21	12	6	1	1

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

Base: circa 4,000 GB adults aged 15+: Q2 / Q3 / Q4 2013 / Q1 2014

Source: Ipsos MORI

PROFILE OF LINKEDIN USERS



Linkedin is a more specific social network : its users skew heavily towards males and more than half are social grade AB.

Consequently, the ownership level for a Tablet is almost twice that of the country average.

Base: circa GB adults (1,000) / All visiting / using Linkedin in last 3 months: (106) Q1 2014

Source: Ipsos MORI

Social Networking – LinkedIn

% ACCESSING LINKEDIN IN THE PAST 3 MONTHS, BY GENDER AND SOCIAL GRADE IN 2013/2014

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	13	9	14	24	17	12	3
Males AB	28	17	33	48	41	23	6
Males C1	14	15	19	23	13	13	1
Males C2	5	4	7	9	7	4	1
Males DE	1	2	2	2	1	2	-
Females	7	8	8	11	11	5	2
Females AB	14	15	15	17	25	8	5
Females C1	9	14	14	8	11	6	-
Females C2	2	3	1	7	1	4	-
Females DE	2	4	2	7	-	-	1

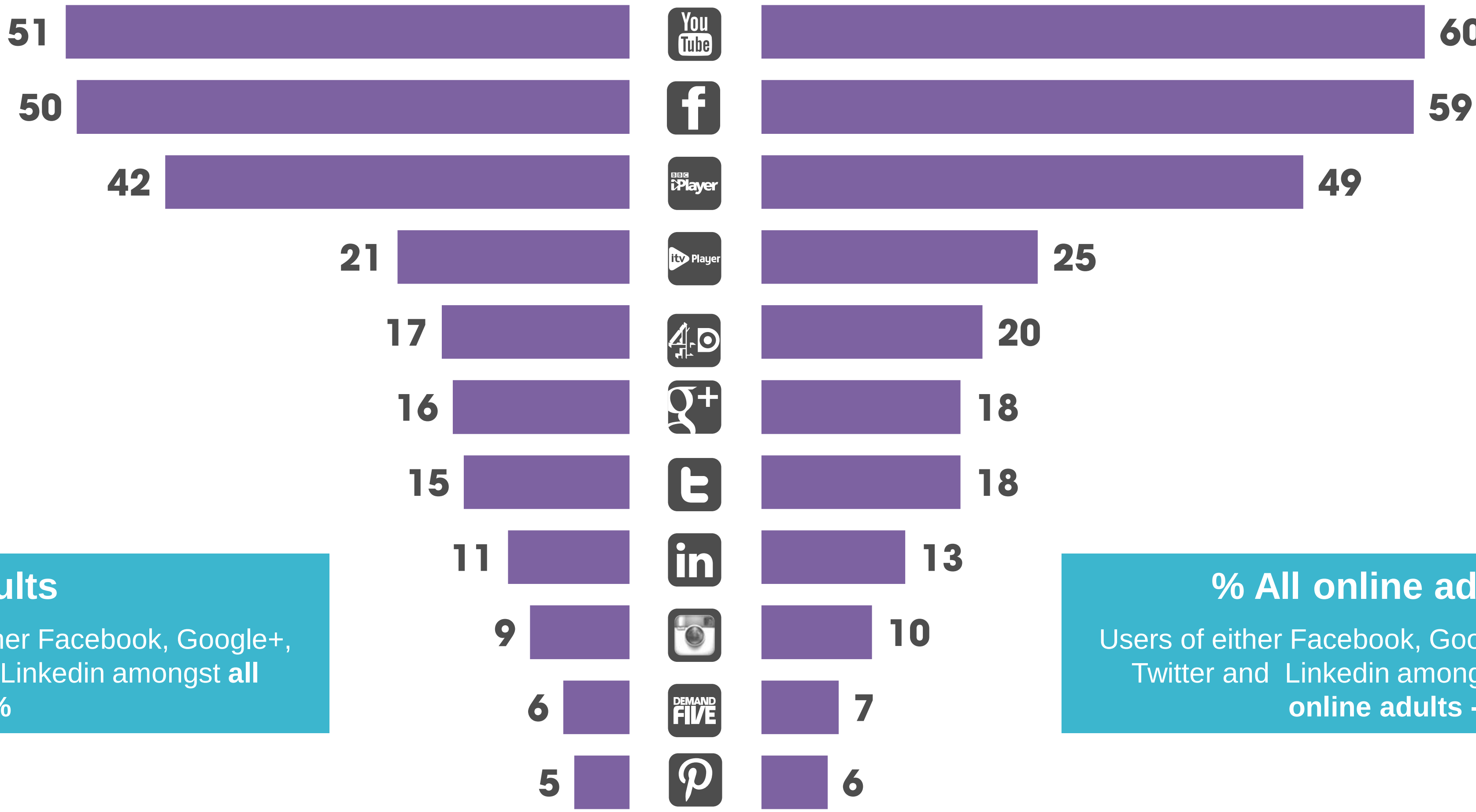
0-49% 50-79% 80-100%

Base: circa 4,000 GB adults aged 15+: Q2 / Q3 / Q4 2013 / Q1 2014

Source: Ipsos MORI

WEBSITES VISITED OR USED IN THE LAST 3 MONTHS

% VISITED IN LAST 3 MONTHS – Quarter 1 2014



% All adults

Users of either Facebook, Google+, Twitter and Linkedin amongst **all adults - 58%**

% All online adults

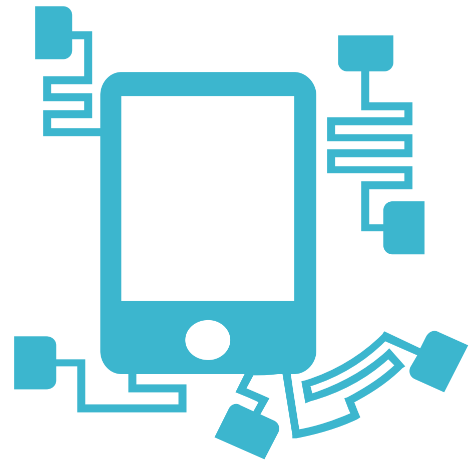
Users of either Facebook, Google+, Twitter and Linkedin amongst **all online adults - 68%**

Base: circa GB adults 1,000 adults aged 15+: Q1 2014

Base: 817 GB online adults aged 15+: Q1 2014

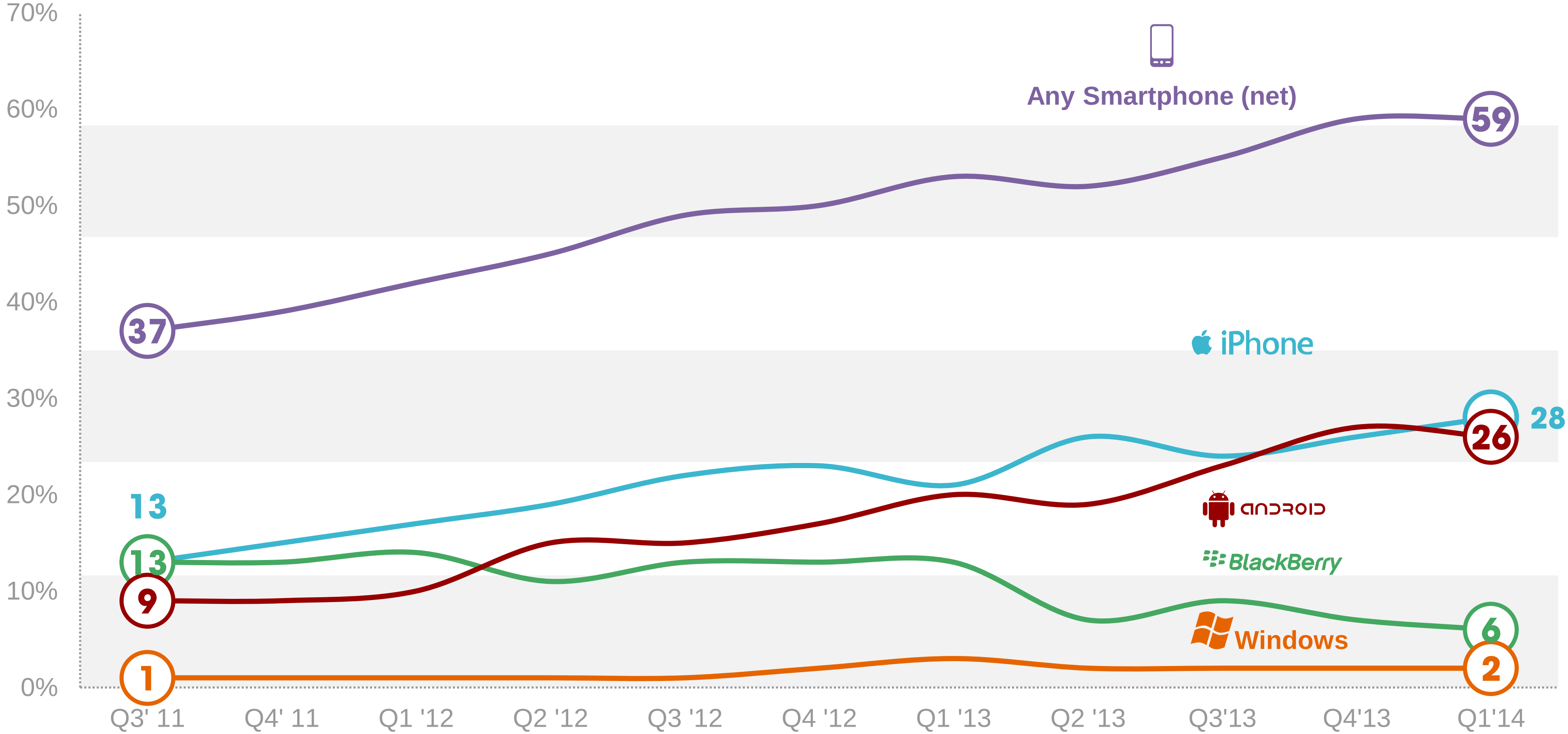
Source: Ipsos MORI

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 2013/2014

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	61	80	83	79	65	45	19
Males AB	69	90	91	88	85	57	28
Males C1	68	83	89	86	68	47	23
Males C2	57	75	80	75	57	43	9
Males DE	49	75	73	57	43	27	11
Females	53	82	78	72	54	33	14
Females AB	63	93	88	82	64	43	34
Females C1	57	88	89	73	55	35	13
Females C2	47	78	65	69	46	36	6
Females DE	44	75	71	58	45	16	6

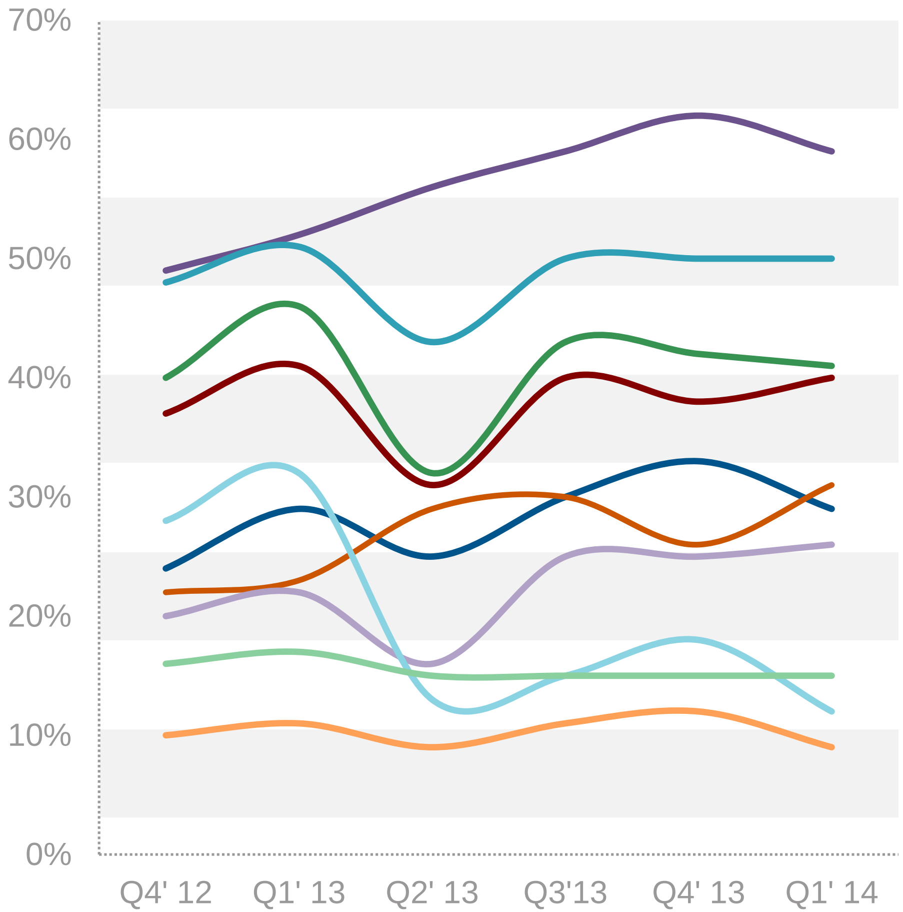
0-49% 50-69% 70-100%

Base: circa 4,000 GB adults aged 15+: Q2/Q3/Q4 2013/Q1 2014

Source: Ipsos MORI

CHANGING WAYS SMARTPHONE IS USED

USE OF SMARTPHONE IN THE PAST 3 MONTHS

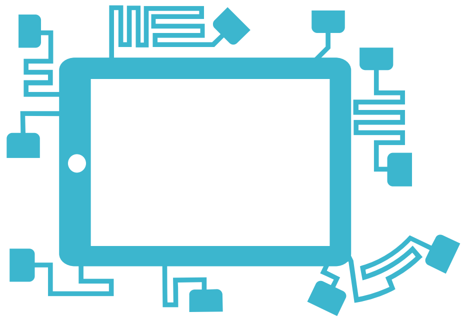


59% Read or send emails
50% Visit social networking sites
41% Browse websites for personal interests
40% Download apps for free
31% Online banking
29% Watch video clips on sites such as Youtube
26% Online shopping
15% Download/stream music over the internet
12% Use instant messaging services such as BBM
9% Watch catch-up tv

Base: circa 430-600 smartphone owners per wave

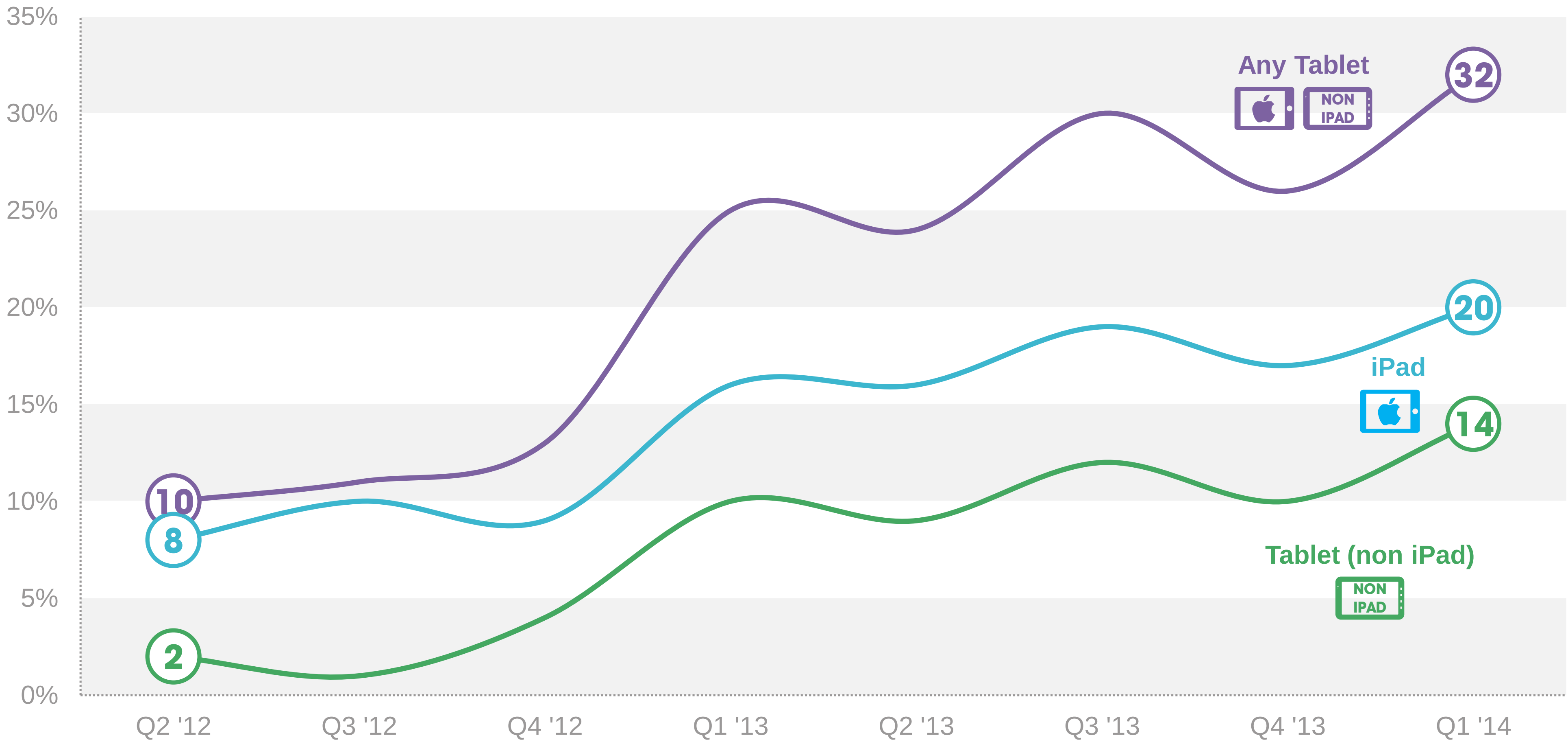
Source: Ipsos MORI

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 2013/2014

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	30	32	30	43	34	31	15
Males AB	46	50	42	71	51	44	21
Males C1	34	39	35	35	37	37	18
Males C2	23	24	27	28	27	20	9
Males DE	15	21	17	18	13	13	8
Females	29	30	36	40	36	25	13
Females AB	43	47	50	47	55	37	28
Females C1	30	33	46	45	33	18	8
Females C2	26	33	34	31	31	25	11
Females DE	17	21	18	32	13	16	6

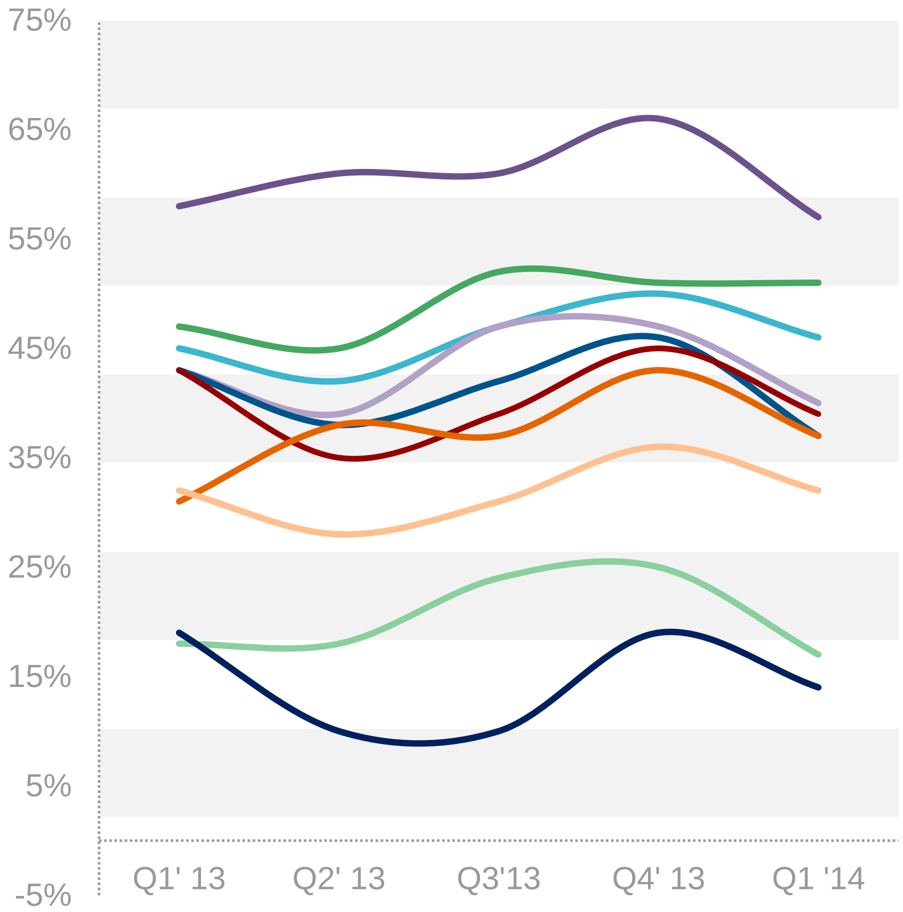
0-24% 25-49% 50-100%

Base: circa 4,000 GB adults aged 15+: Q2/Q3/Q4 2013/Q1 2014

Source: Ipsos MORI

CHANGING WAYS TABLET IS USED

USE OF TABLET IN THE PAST 3 MONTHS



57% Read or send emails

51% Browse websites for personal interests

46% Visit social networking sites

40% Online shopping

39% Download apps for free

37% Watch video clips on sites such as YouTube

37% Online banking

32% Watch catch-up tv

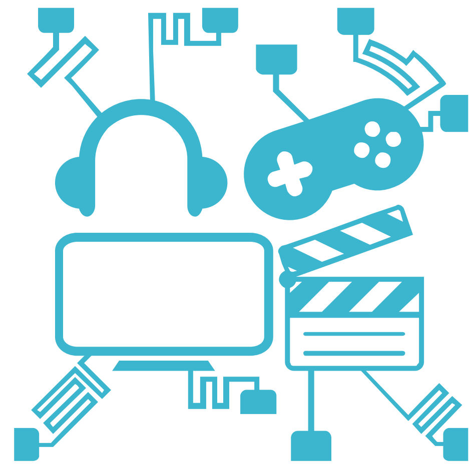
17% Download/stream music over the internet

14% Use the internet to make video calls (VOIP)

Base: circa 200 – 300 adults 15+ who own tablets

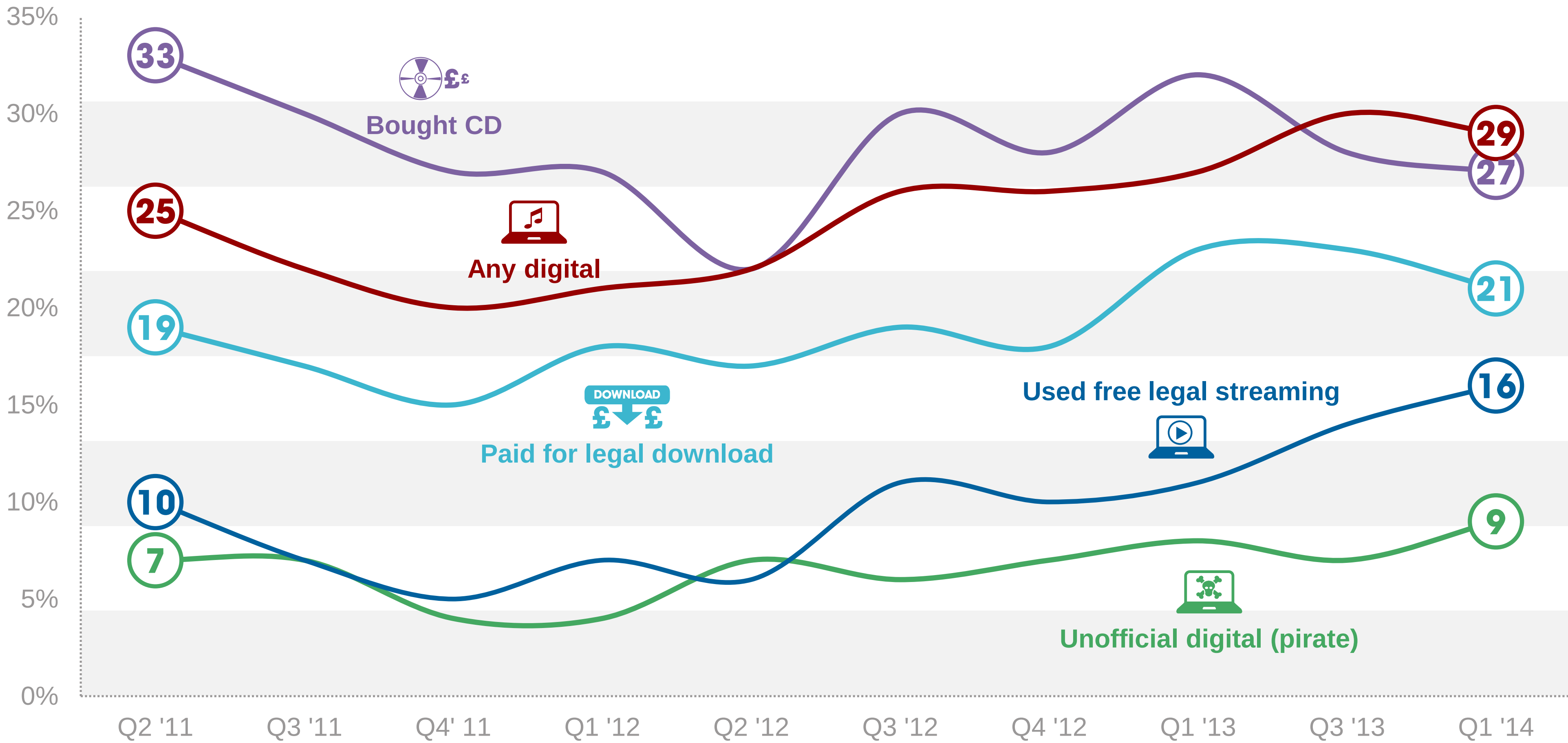
Source: Ipsos MORI

CONTENT CONSUMPTION
MUSIC / GAMES / TV / MOVIES



HOW WE CONSUME MUSIC

MUSIC CONSUMPTION

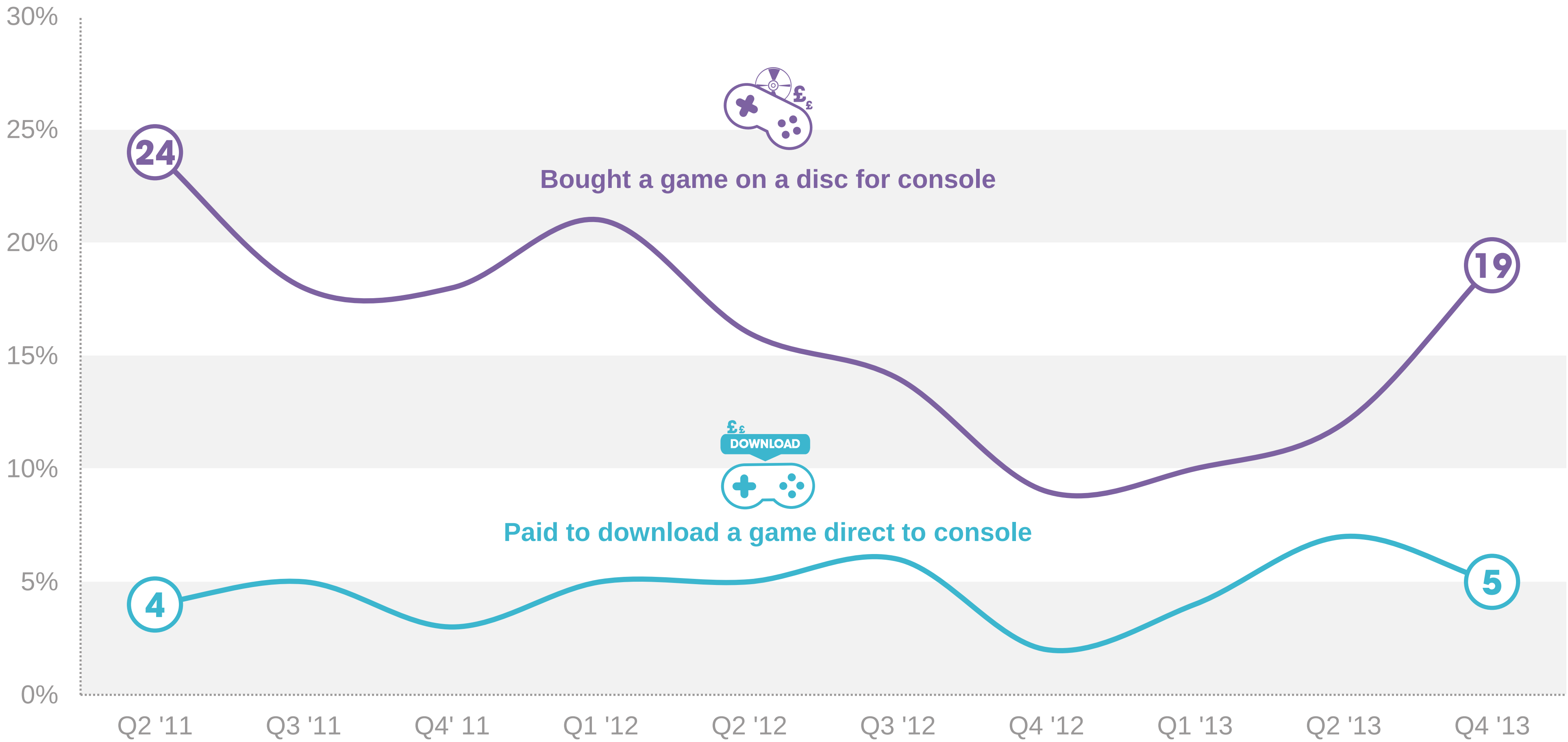


Base: circa 1,000 GB adults aged 15+ per wave / Music consumption is tracked every 6 months

Source: Ipsos MORI

HOW WE CONSUME GAMES FOR CONSOLES

GAMES CONSUMPTION

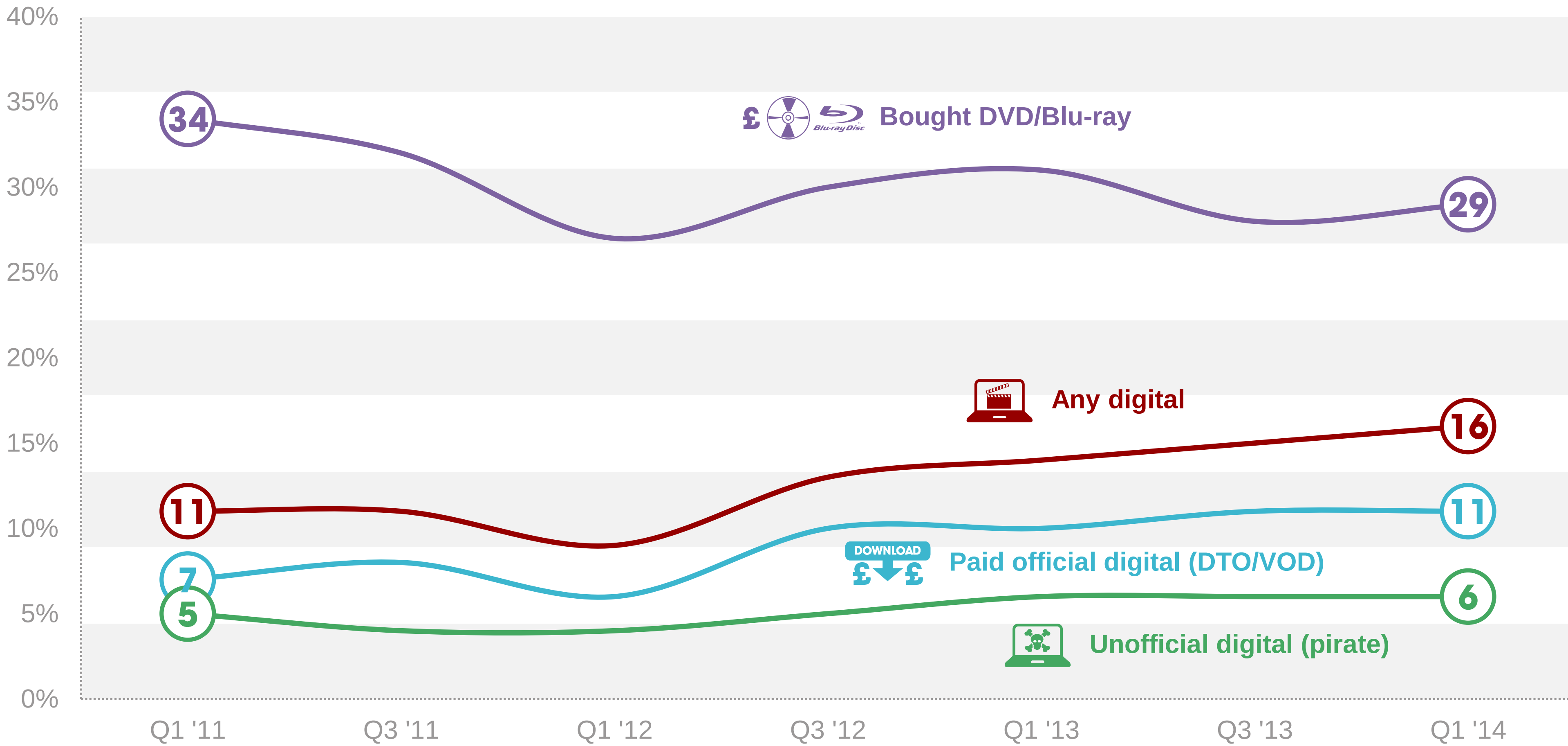


Base: circa 1,000 GB adults aged 15+ per wave / Games consumption is tracked every 6 months

Source: Ipsos MORI

HOW WE ACCESS MOVIES

MOVIE CONSUMPTION

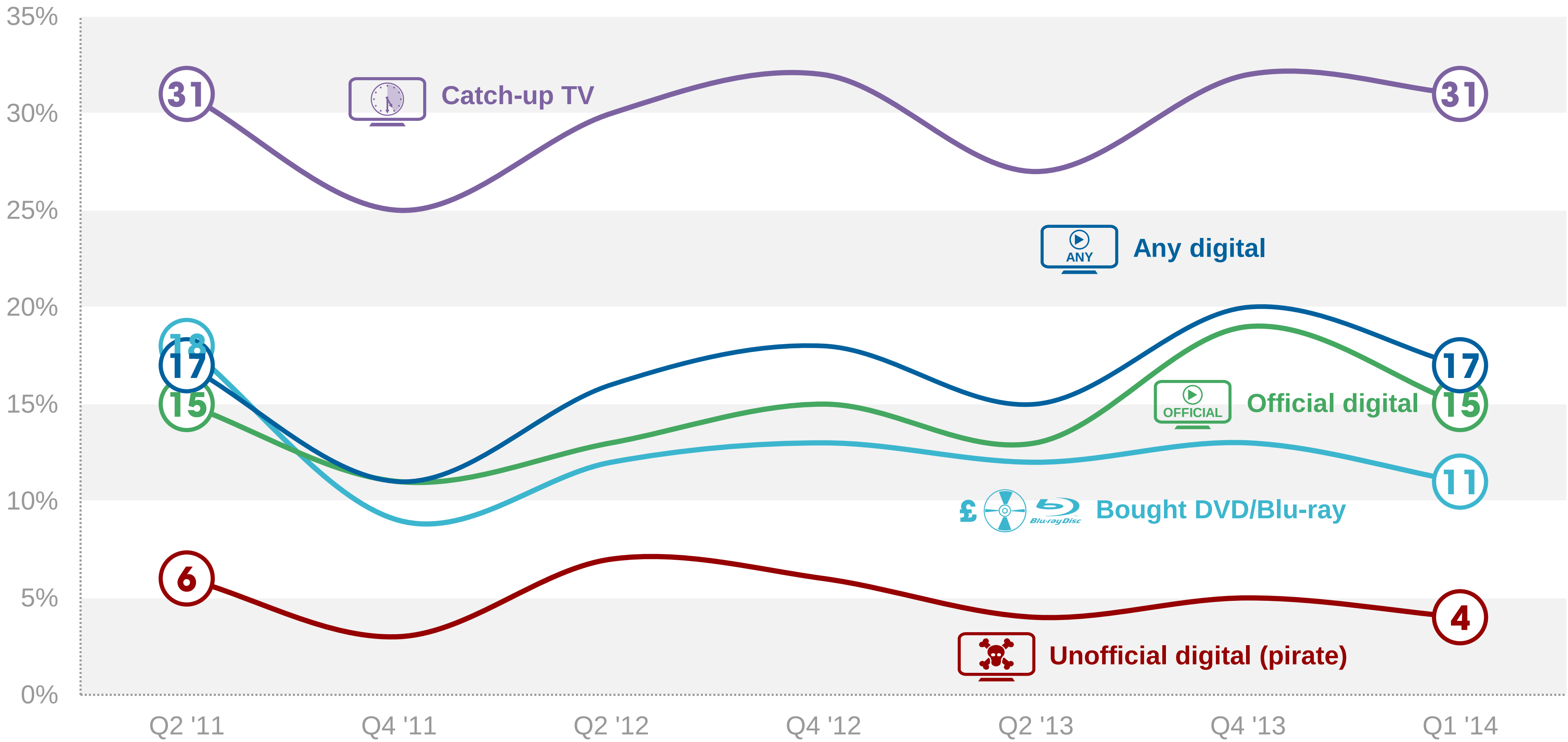


Base: circa 1,000 GB adults aged 15+ per wave / Movie consumption is tracked every 6 months

Source: Ipsos MORI

HOW WE ACCESS TV SERIES

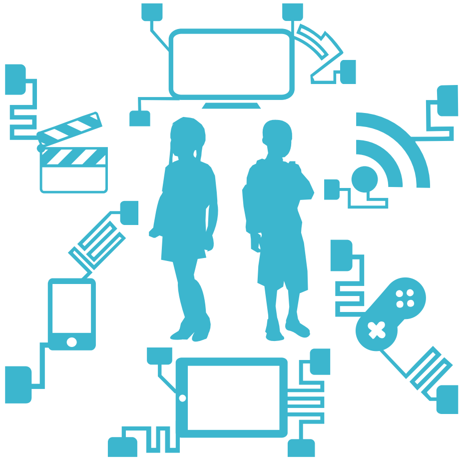
TV SERIES CONSUMPTION



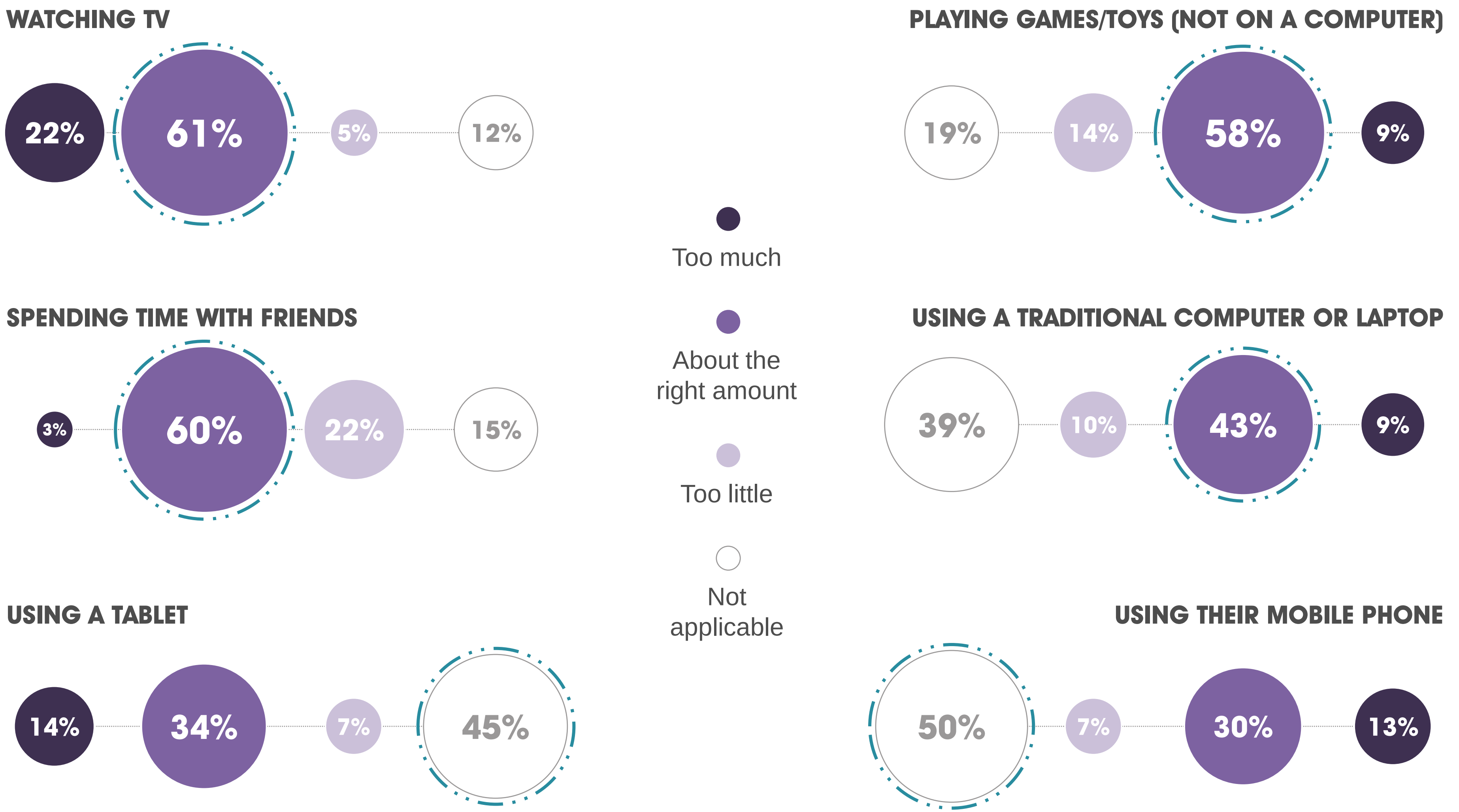
Base: circa 1,000 GB adults aged 15+ per wave / TV consumption is tracked every 6 months

Source: Ipsos MORI

TECHNOLOGY AND CHILDREN



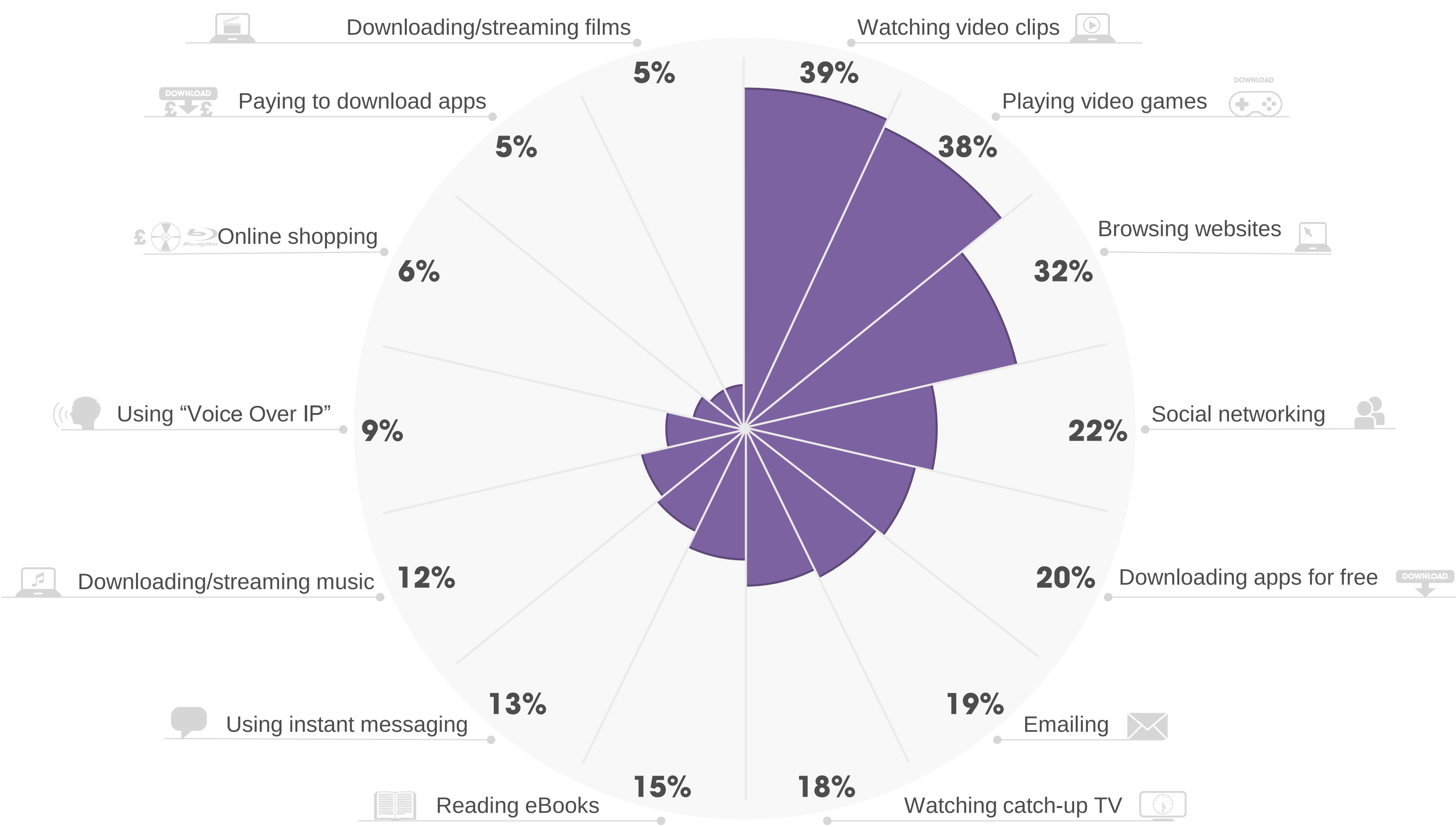
PARENTS' OPINION ON THE AMOUNT OF TIME THEIR CHILDREN SPEND ON ACTIVITIES



Base: GB adults who have children in household (237) Q1 2014 .

Source: Ipsos MORI

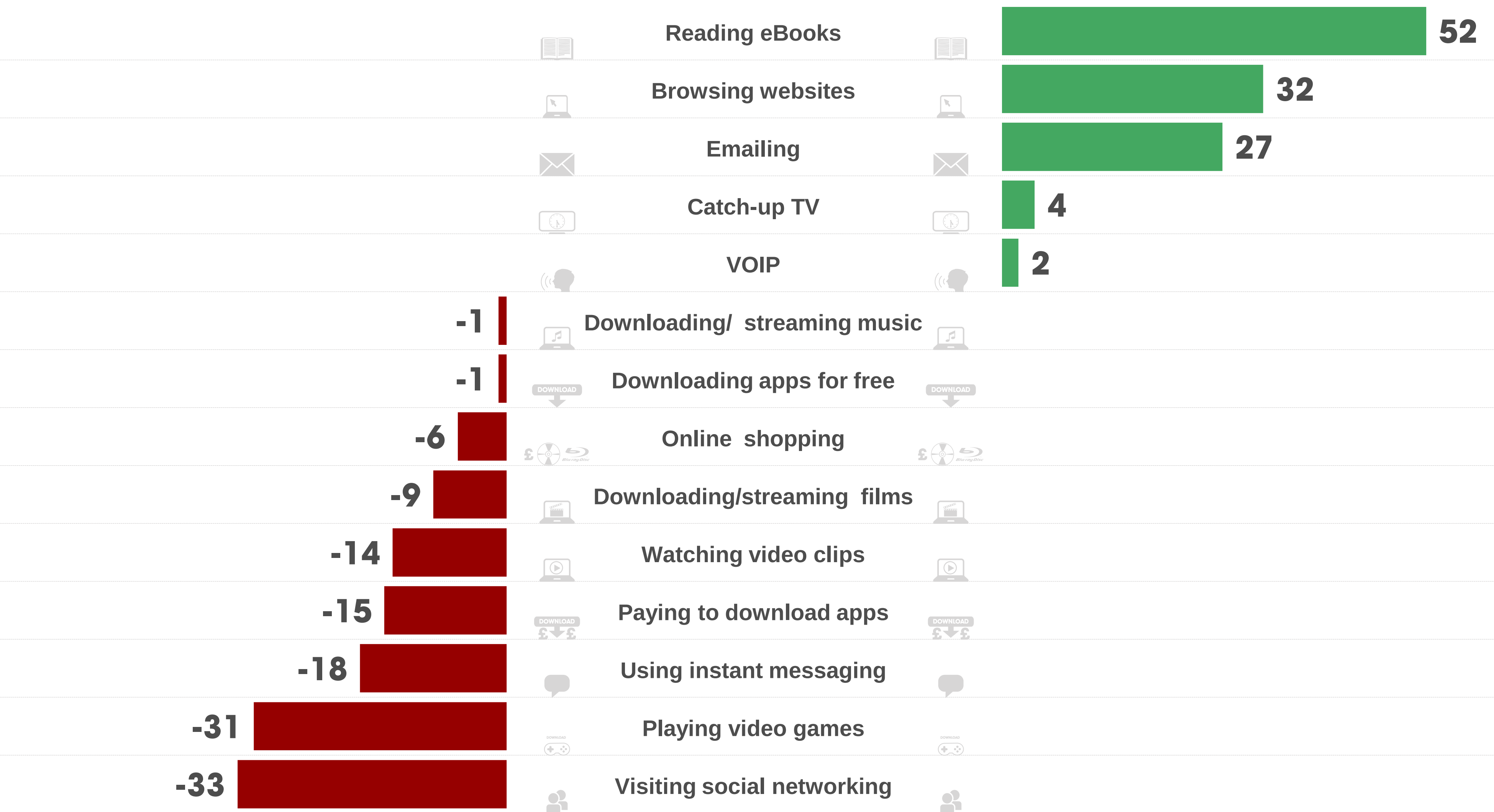
ACTIVITIES CARRIED OUT BY CHILDREN ON INTERNET-ENABLED DEVICES



Base: GB adults who have children in household (237) Q1 2014

Source: Ipsos MORI

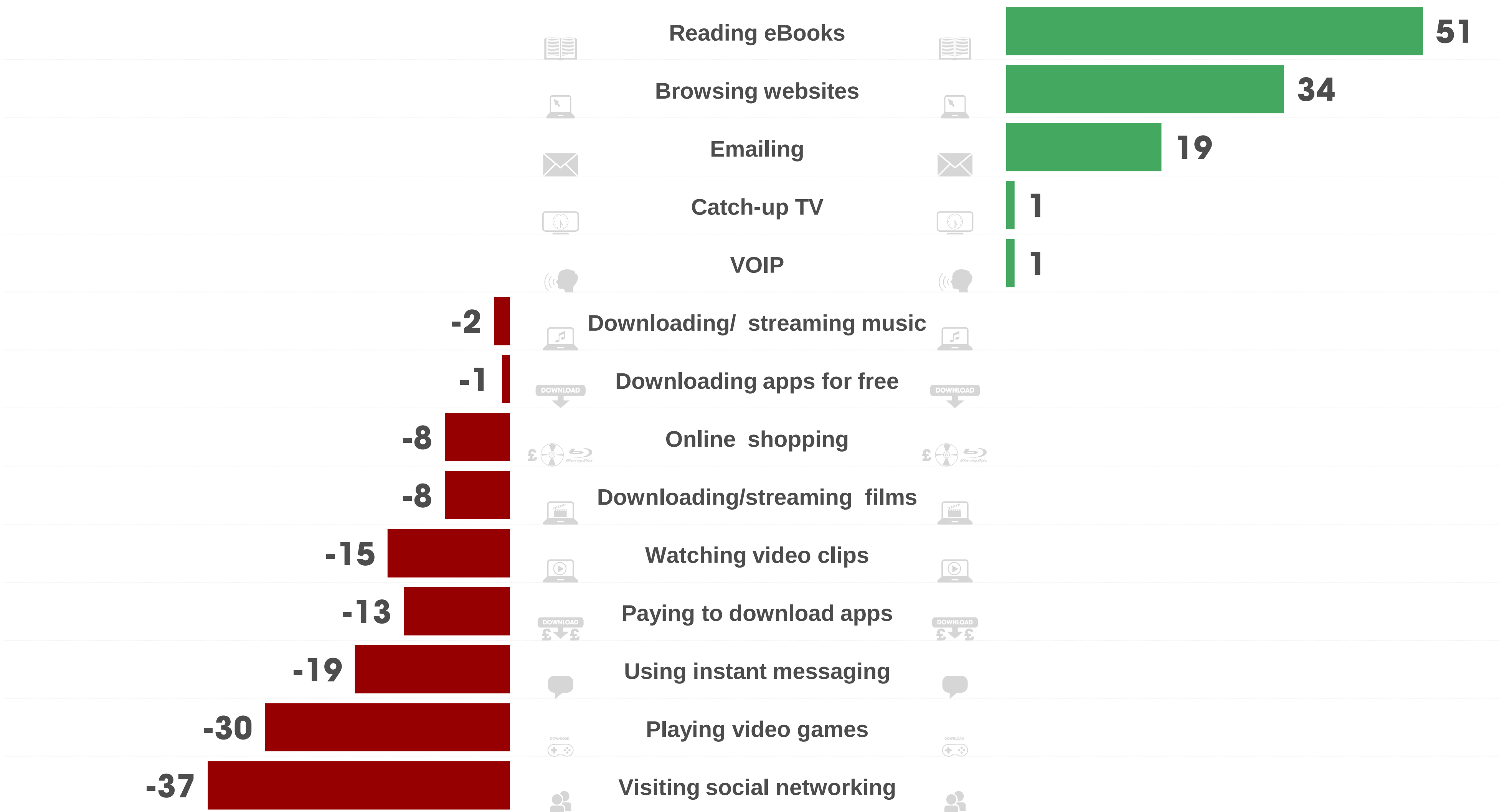
NET PERCEIVED EFFECTS OF ACTIVITIES ON CHILDREN (AMONG ALL GB ADULTS)



Base: circa 1,000 GB adults aged 15+: Q1 2014. "Which of these activities would you say on balance are having a beneficial / harmful effect on children in Britain today"

Source: Ipsos MORI

NET PERCEIVED EFFECTS OF ACTIVITIES ON CHILDREN (AMONG PARENTS WITH CHILDREN IN THE HOUSEHOLD)



Base: GB adults who have children in household (237) Q1 2014. "Which of these activities would you say on balance are having a beneficial / harmful effect on children in Britain today" Source: Ipsos MORI

TECH TRACKER TECHNICAL DETAILS

Ipsos MORI interviewed a quota sample of **983 adults aged 15+ in GB.**

The latest interviews were carried out face to face **31st January – 7th February 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.

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.

FURTHER INFORMATION

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About Ipsos MediaCT

Ipsos MediaCT plays a prominent role within media and communications research, holding key industry audience measurement contracts and conducting bespoke research to assist their clients in informing their strategic decisions. We help clients make connections in the digital age, as leaders in providing research solutions for companies in the fast-moving and rapidly converging worlds of media, content, telecom and technology. Using a wide variety of research techniques, we help individual media owners, technology companies, agencies and advertisers address issues such as editorial and programming, advertising, audience profiling and music tastes, market positioning, piracy, high definition and theatrical markets, new product and programme development and license applications.

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Winner - 2011 MRS Awards: “Best Innovation”