TECH TRACKER

QUARTERLY RELEASE: Q3 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 3 2014 (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

The proportion of adults accessing the internet is at 84%, with mobile access staying relatively constant at 55%.

The top online activities remain: accessing email (76%), browsing for information on hobbies (69%), researching products and services (61%) and online shopping (55%).

Connected home

The percentage of households with connected TVs is still only around 13% of GB homes.

38% of GB adults have at least one of the games consoles in their household which has generally remained the same over the last year. Ownership of consoles between brands is almost equal with both Xbox 360/One & PS3/4 penetration at 18% and Wii/WiiU penetration at 17%.

Social networking

54% of GB adults access social networking sites, 30% access via a Smartphone. Tablet access has risen to 20% in the last few waves and 2% are accessing via an internet TV.

51% of all adults have used Facebook in the past 3 months. 18% have used Twitter, 11% used Google+ (down from 18% last wave) and 9% used LinkedIn.

Smartphones

Smartphone base ownership is 61%. Android penetration is slightly lower than iOS this wave at 28% vs. 30%. Both BlackBerry and Windows have decreased slightly to 5% and 3% respectively.

Tablets

Tablet ownership is just over 1 in 3 households at 35%. Amongst tablet owners, the most popular are iPads at 59% and Samsung tablets at 25%. E-mailing is the top activity carried out on this device, though it is becoming more common to carry out many other activities on tablets as well such as online banking, social networking, watching catch-up TV and video calling.

Music/games & movies/TV

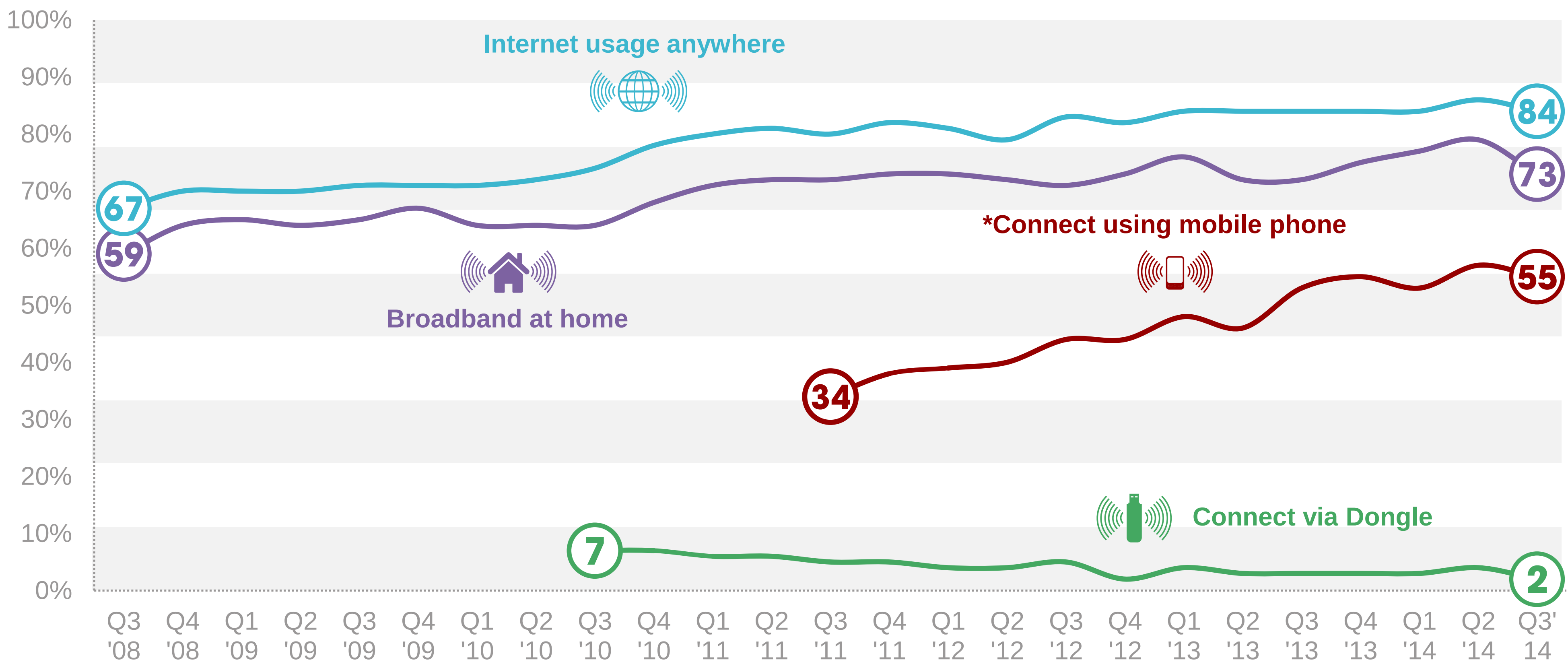
The trend towards downloading digital music to any device & away from buying physical copies of music media has continued. Whilst buying films on DVD/Blu-ray has dropped since Q1, consuming digital film content has remained relatively consistent with a slight rise in film piracy.

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%	94%	91%	81%	59%
Males AB	94%	100%	100%	100%	98%	96%	80%
Males C1	92%	99%	97%	97%	96%	89%	69%
Males C2	84%	95%	97%	98%	91%	81%	44%
Males DE	71%	94%	94%	78%	67%	52%	32%
Females	83%	97%	95%	94%	91%	79%	53%
Females AB	93%	100%	100%	100%	99%	95%	80%
Females C1	89%	100%	99%	97%	96%	88%	63%
Females C2	80%	97%	93%	94%	90%	83%	38%
Females DE	67%	93%	89%	83%	71%	48%	32%

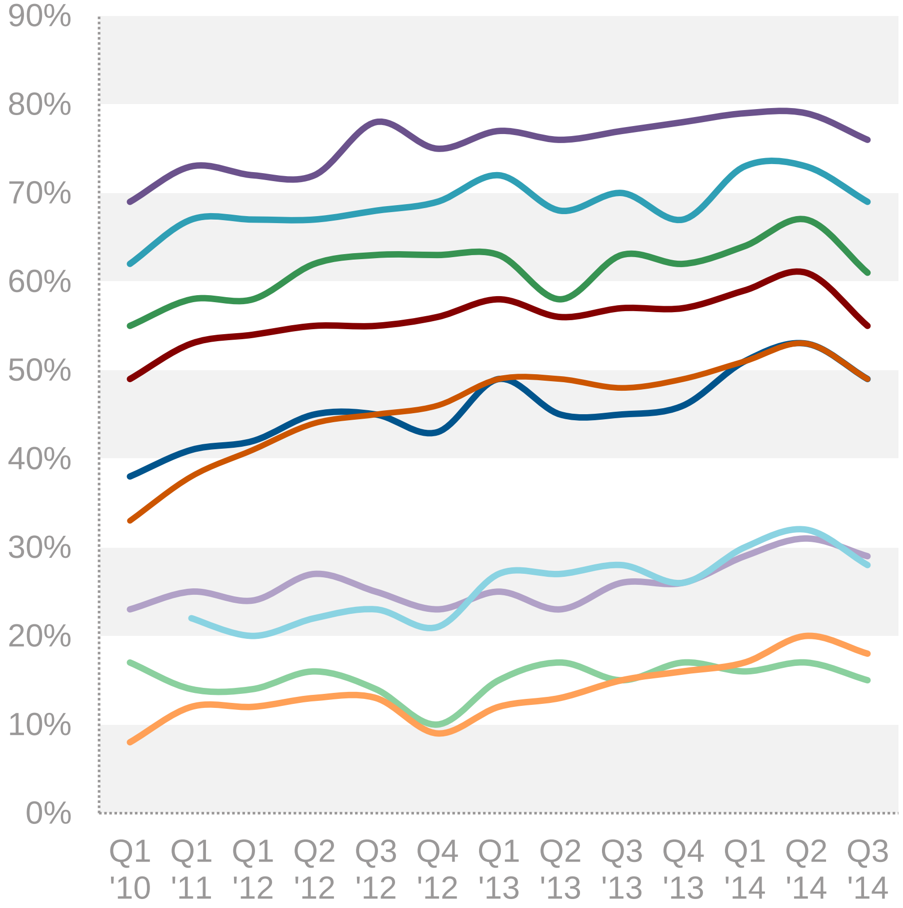
0-49% 50-79% 80-100%

Base: circa 1,000 GB adults aged 15+: Q4 2013 / Q1 / Q2/ Q3 2014

Source: Ipsos MORI

CHANGING WAYS THE INTERNET IS USED

% USE OF THE INTERNET IN THE PAST 3 MONTHS



- **76%** Emails
- **69%** Visit sites for info personal interests
- **61%** Visit sites for info on products thinking of buying
- **55%** Visit sites to buy on products online
- **49%** Social networking
- **49%** Check bank account/other financial holdings
- **29%** Download/stream music
- **28%** Download/stream TV
- **18%** Download/stream movies
- **15%** Play video games online

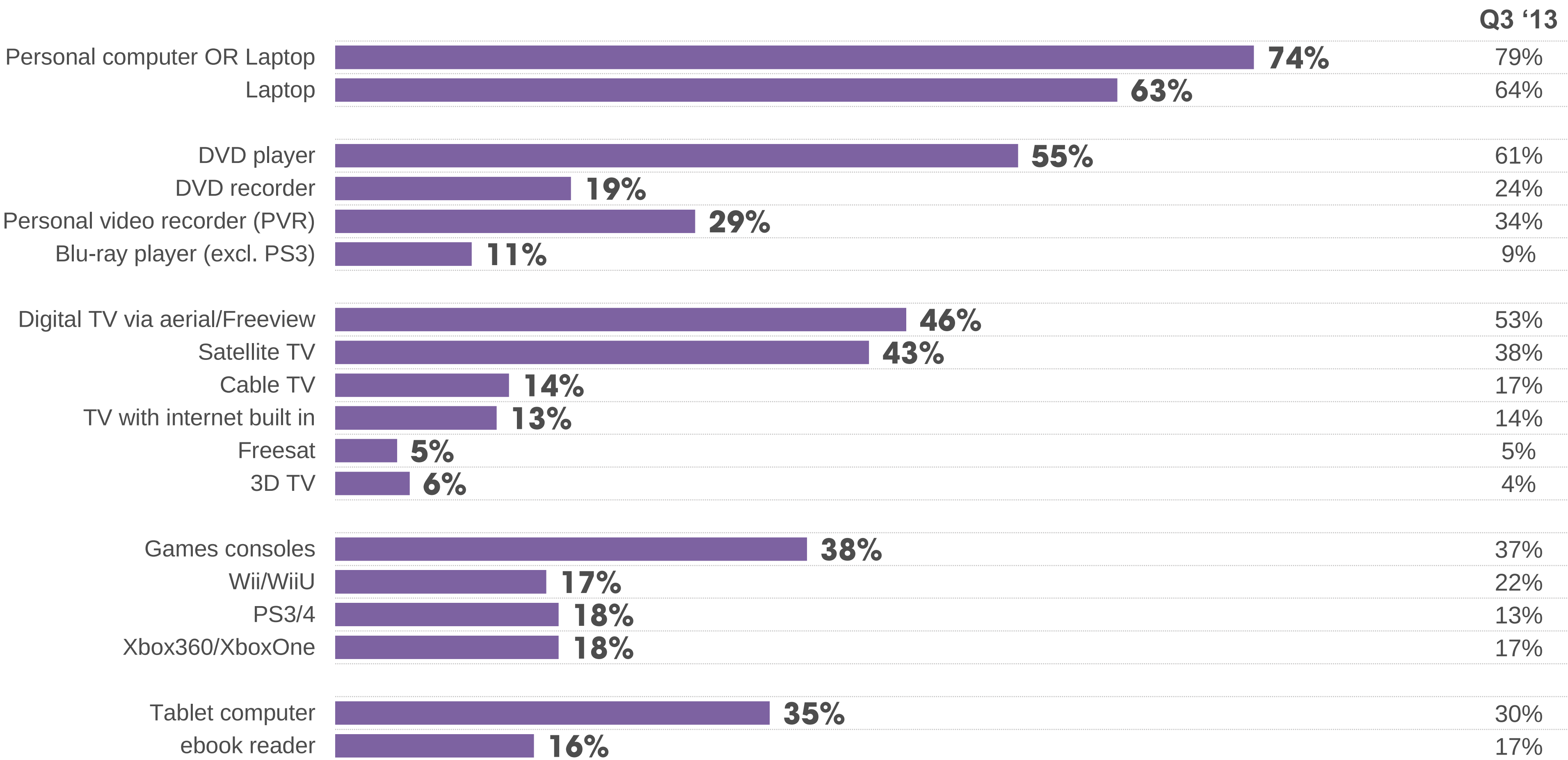
Base: circa 2,000 interviews per wave until Quarter 1 2010, circa 1,000 GB adults aged 15+ per wave thereafter

Source: Ipsos MORI

CONNECTED HOME

EQUIPMENT IN THE HOME

WHICH OF THE FOLLOWING DO YOU OWN/HAVE IN YOUR HOUSEHOLD?: Quarter 3 2014

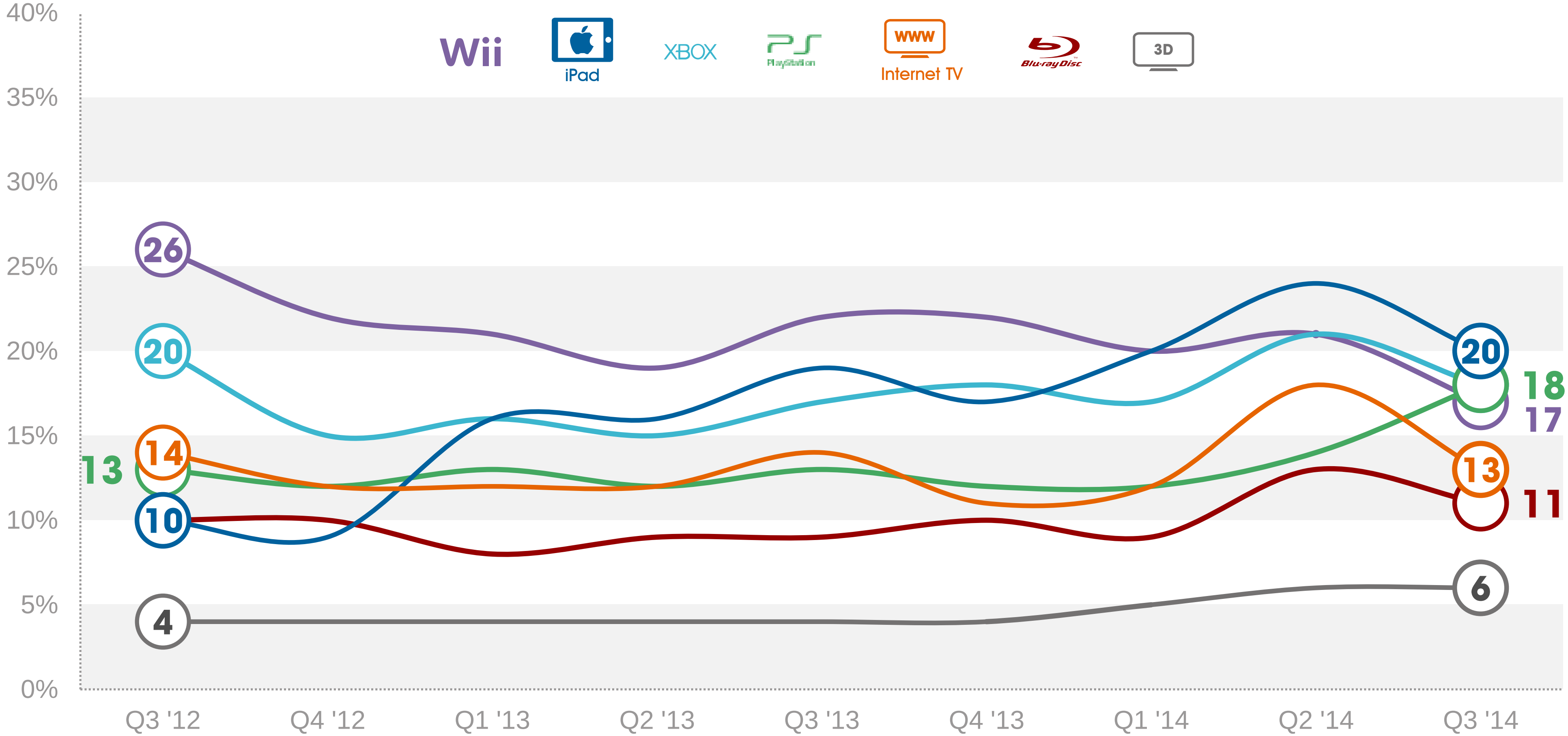


Base: circa 1,000 GB adults aged 15+: Quarter 3 2014

Source: Ipsos MORI

TRENDS IN EQUIPMENT OWNERSHIP IN THE HOME

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



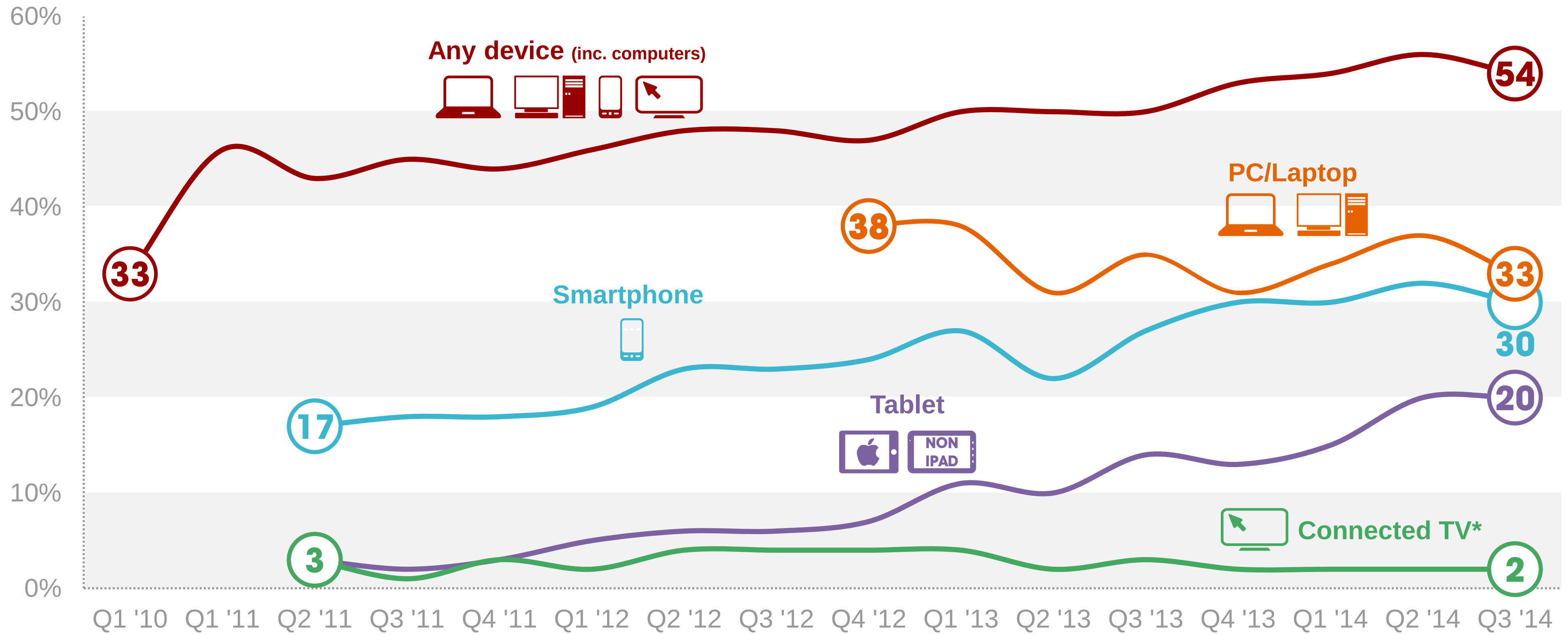
Base: circa 1,000 GB adults aged 15+ per wave

Source: Ipsos MORI

SOCIAL NETWORKING

TRENDS IN VISITING SOCIAL NETWORKING SITES

% VISITING SOCIAL NETWORKING SITES



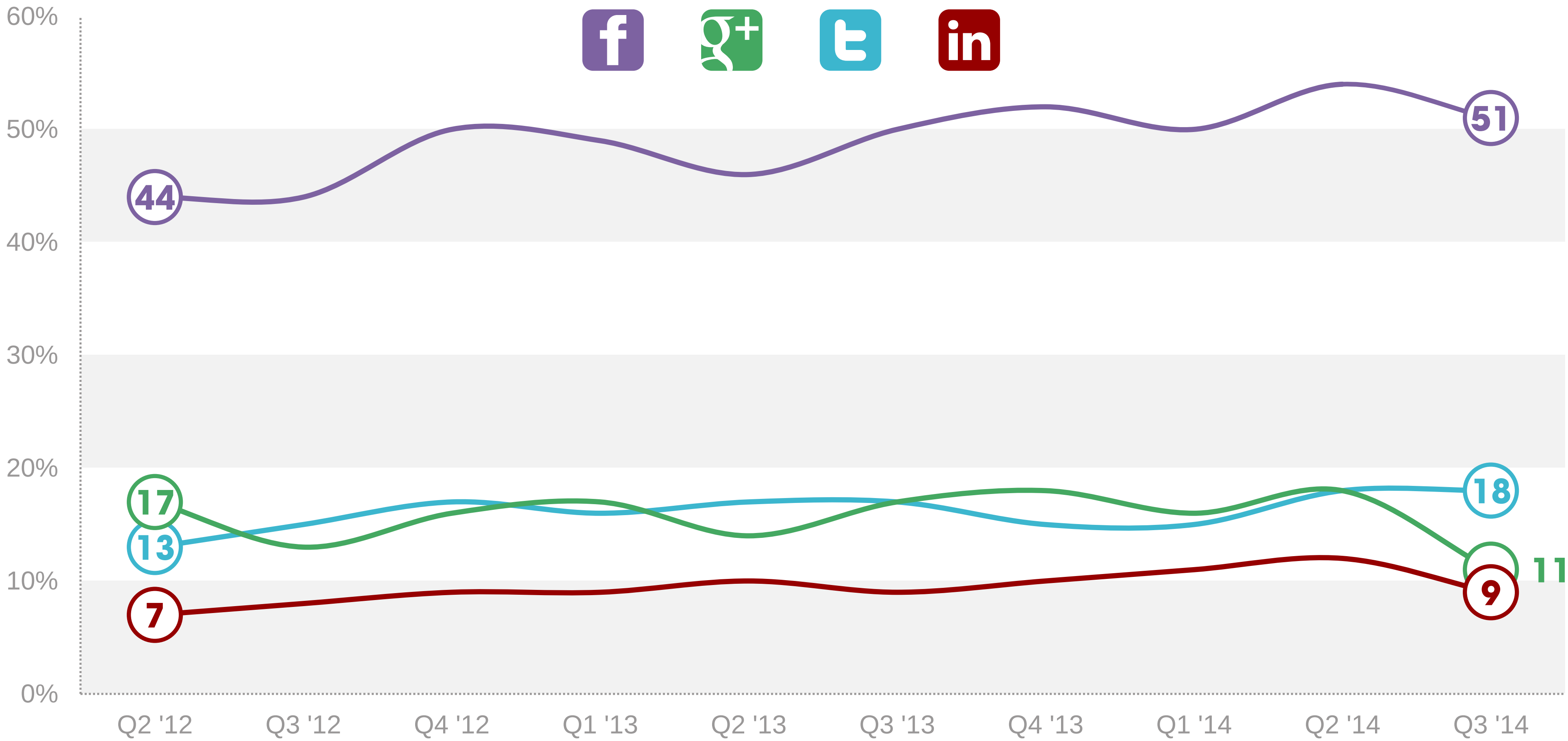
Connected TV* - Games console, web enabled TVs and PCs connected to a TV

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

ALL ADULTS		
49%	Male	45
51%	Female	55
16%	15-24	26
17%	25-34	24
16%	35-44	19
17%	45-54	18
35%	55+	14
26%	AB	26
28%	C1	32
22%	C2	22
24%	DE	20
61%	Own Smartphone	83
35%	Own Tablet	49

The profile of Facebook users is relatively younger than the wider population.
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 (465): Q3 2014

Source: Ipsos MORI

Social Networking – Facebook

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

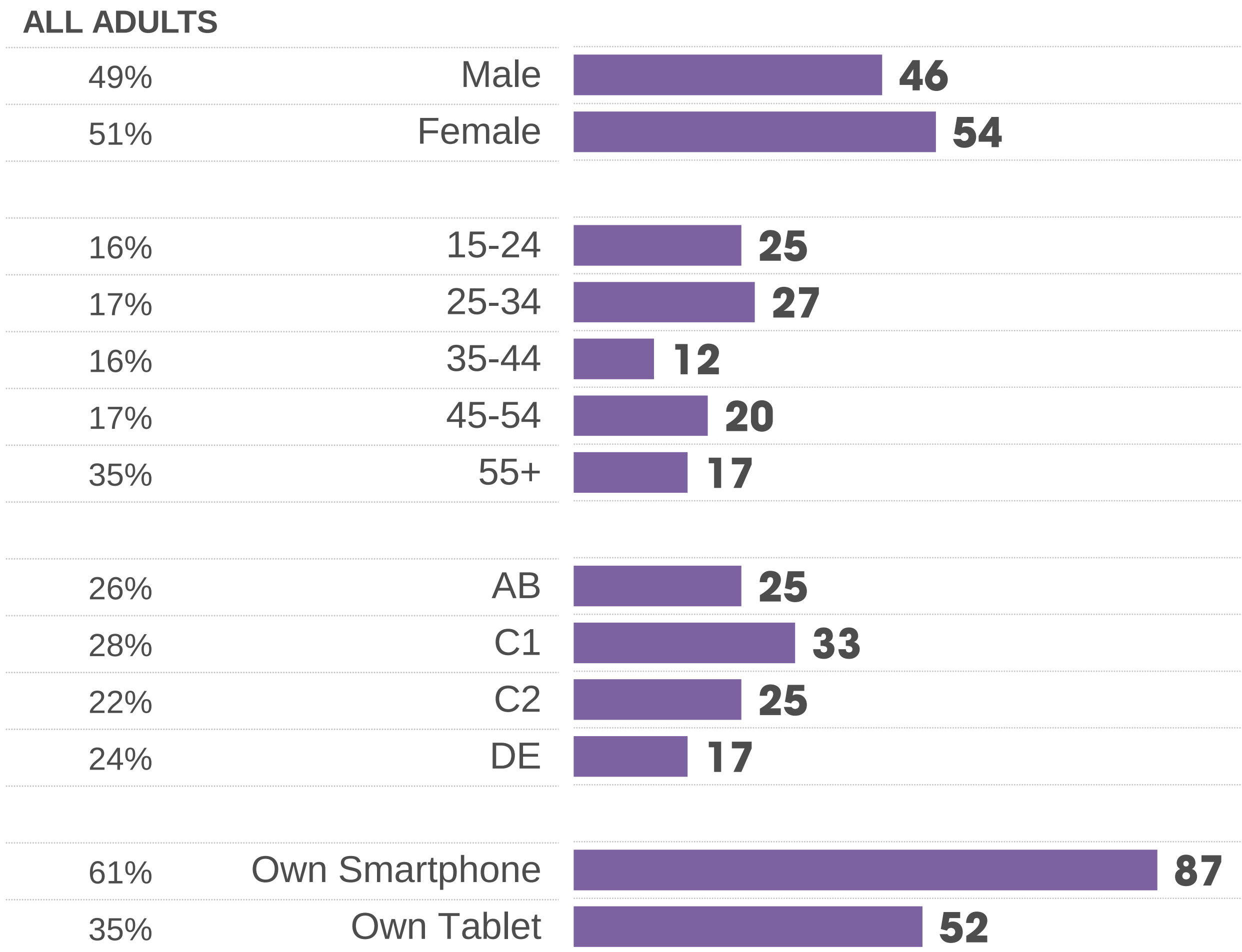
	All	15-24	25-34	35-44	45-54	55-64	65+
Males	51%	83%	75%	55%	50%	33%	14%
Males AB	53%	95%	83%	61%	62%	36%	18%
Males C1	57%	83%	81%	60%	46%	34%	19%
Males C2	50%	80%	68%	54%	50%	34%	12%
Males DE	43%	76%	69%	41%	33%	25%	7%
Females	53%	85%	75%	65%	54%	38%	17%
Females AB	55%	88%	84%	55%	55%	44%	23%
Females C1	57%	89%	77%	69%	60%	47%	16%
Females C2	53%	86%	65%	73%	51%	34%	16%
Females DE	47%	79%	71%	54%	43%	24%	14%

0-49% (dark red) 50-79% (orange) 80-100% (green)

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

Source: Ipsos MORI

PROFILE OF GOOGLE+ USERS



In contrast to Facebook, Google+ has captured more users aged 15-34 and 45+ age group.

Smartphone and tablet penetration slightly higher than Facebook users.

Base: circa GB adults (1,000) / All visiting / using Google+ in last 3 months (113): Q3 2014

Source: Ipsos MORI

Social Networking – Google+

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

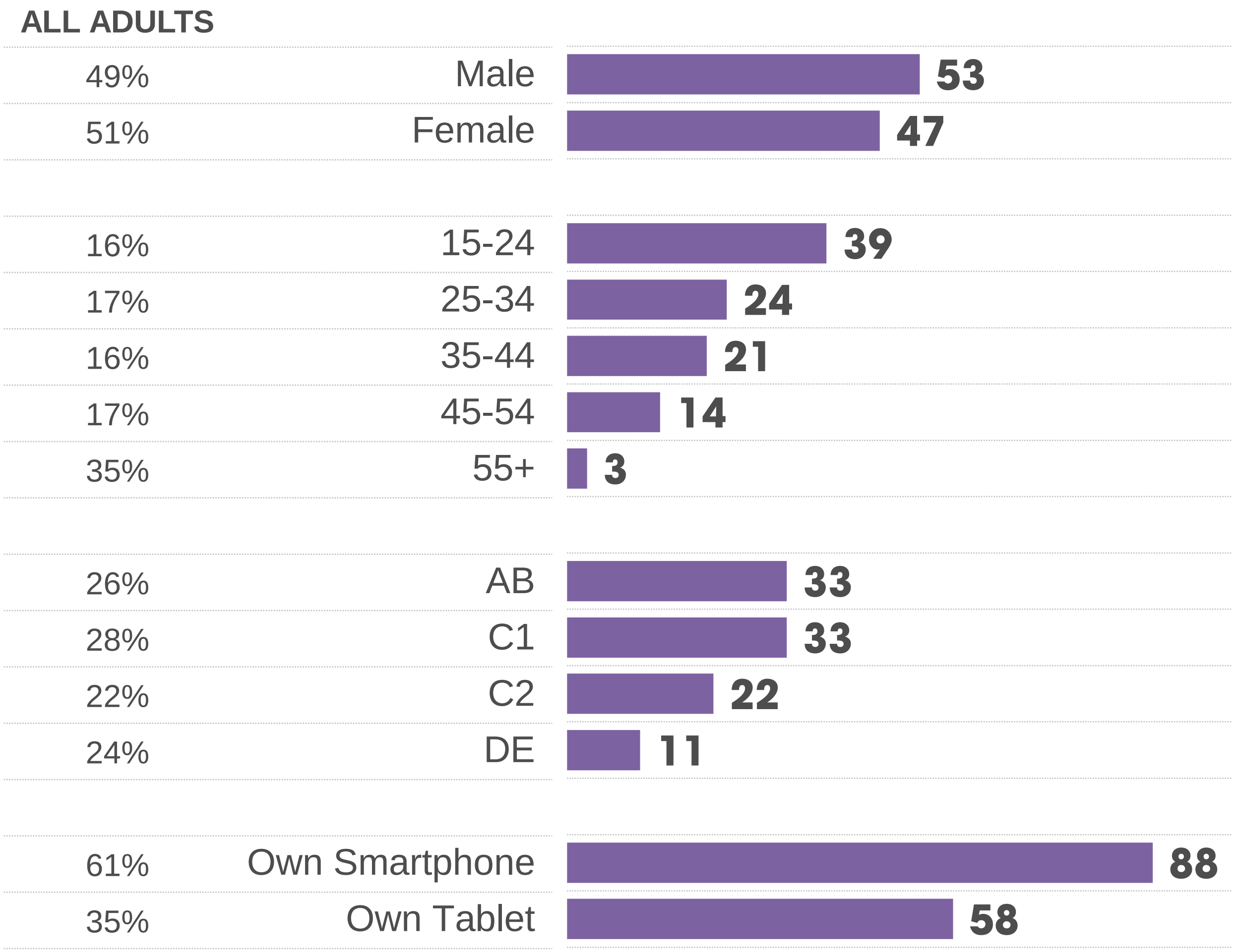
	All	15-24	25-34	35-44	45-54	55-64	65+
Males	16%	25%	20%	21%	17%	11%	4%
Males AB	17%	33%	15%	23%	21%	10%	7%
Males C1	21%	30%	30%	24%	18%	16%	4%
Males C2	15%	20%	18%	20%	20%	14%	2%
Males DE	11%	18%	16%	15%	5%	6%	2%
Females	15%	25%	19%	17%	15%	14%	5%
Females AB	17%	36%	20%	16%	17%	15%	12%
Females C1	16%	29%	18%	20%	16%	17%	3%
Females C2	14%	17%	20%	18%	16%	16%	4%
Females DE	12%	22%	17%	14%	9%	8%	3%

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

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

Source: Ipsos MORI

PROFILE OF TWITTER USERS



Twitter users are young: Nearly two thirds are aged under 35.

They are also more likely to be AB or C1 social grade and quite mobile: 88% of them own a Smartphone, 58% a Tablet.

Base: circa GB adults (1,000) / All visiting / using Twitter in last 3 months (151): Q3 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	19%	37%	27%	26%	17%	7%	3%
Males AB	25%	46%	44%	37%	26%	11%	5%
Males C1	23%	40%	32%	33%	12%	3%	4%
Males C2	17%	37%	23%	18%	15%	9%	1%
Males DE	11%	28%	14%	8%	6%	4%	0%
Females	14%	36%	18%	18%	12%	6%	1%
Females AB	16%	46%	21%	20%	16%	5%	3%
Females C1	19%	51%	22%	23%	12%	10%	1%
Females C2	12%	31%	13%	17%	10%	5%	2%
Females DE	10%	23%	16%	9%	8%	1%	1%

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

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

Source: Ipsos MORI

PROFILE OF LINKEDIN USERS

ALL ADULTS

ALL ADULTS		LinkedIn users
49%	Male	50
51%	Female	50
16%	15-24	16
17%	25-34	22
16%	35-44	28
17%	45-54	20
35%	55+	14
26%	AB	53
28%	C1	27
22%	C2	14
24%	DE	6
61%	Own Smartphone	93
35%	Own Tablet	70

Linkedin is a more specific social network: it is highest among 35-44 age group and more than half are social grade AB.

Consequently, Tablet ownership is greater than the country average by more than half.

Base: circa GB adults (1,000) / All visiting / using Linkedin in last 3 months: (69) Q3 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%	10%	16%	20%	20%	11%	4%
Males AB	27%	17%	35%	40%	48%	19%	7%
Males C1	14%	15%	22%	16%	14%	16%	4%
Males C2	6%	6%	9%	10%	1%	14%	2%
Males DE	2%	5%	1%	3%	1%	6%	2%
Females	8%	10%	8%	12%	11%	14%	5%
Females AB	15%	17%	14%	20%	4%	18%	12%
Females C1	10%	20%	12%	11%	12%	17%	3%
Females C2	3%	2%	5%	6%	4%	16%	4%
Females DE	2%	4%	1%	7%	0%	0%	7%

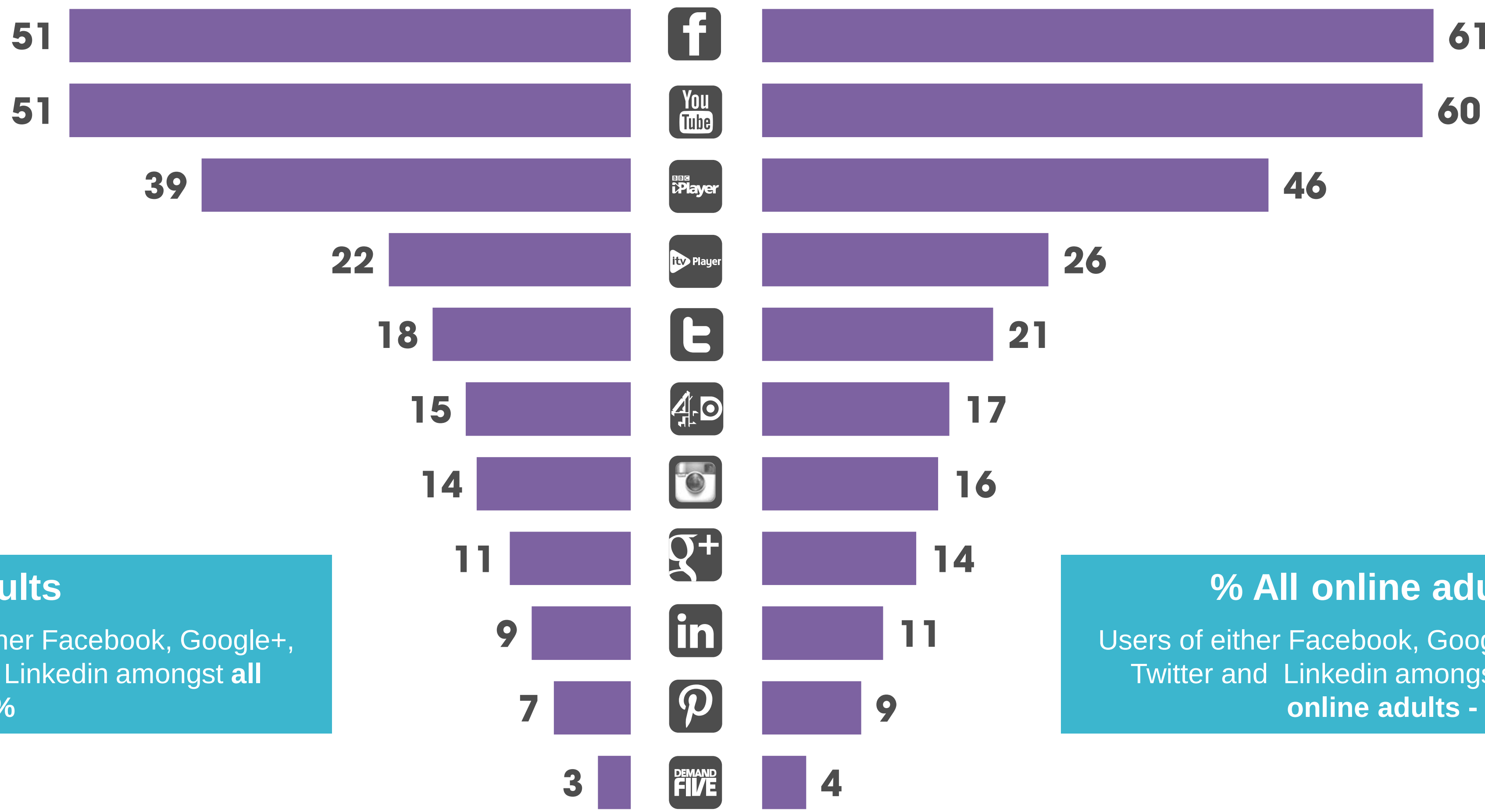
0-49% 50-79% 80-100%

Base: circa 4,000 GB adults aged 15+: Q4 2013 / Q1 / Q2/ Q3 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 - 55%**

% All online adults

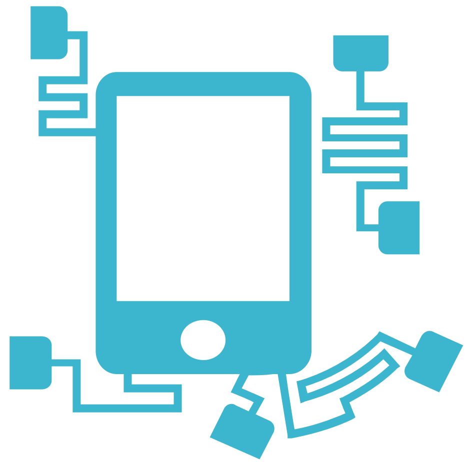
Users of either Facebook, Google+, Twitter and Linkedin amongst **all online adults - 66%**

Base: circa GB adults 1,000 adults aged 15+: Q3 2014

Base: 787 GB online adults aged 15+: Q3 2014

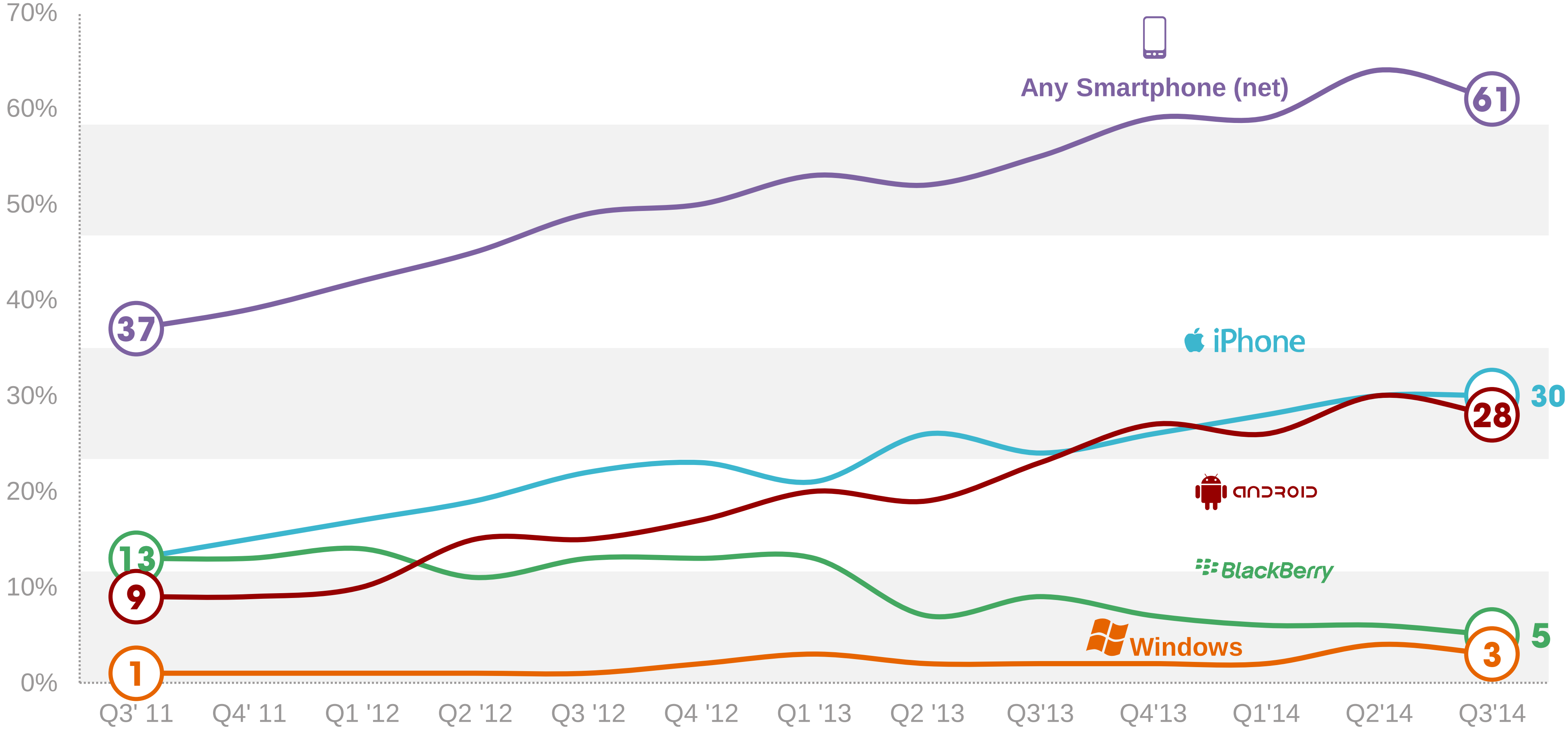
Source: Ipsos MORI

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	64%	88%	86%	79%	70%	48%	20%
Males AB	72%	90%	95%	93%	87%	61%	29%
Males C1	71%	89%	89%	82%	64%	55%	29%
Males C2	62%	82%	84%	80%	69%	46%	12%
Males DE	48%	78%	79%	53%	44%	22%	10%
Females	58%	89%	91%	79%	61%	39%	15%
Females AB	69%	97%	94%	91%	75%	48%	31%
Females C1	61%	94%	78%	79%	64%	40%	15%
Females C2	54%	88%	76%	77%	50%	41%	5%
Females DE	48%	82%	79%	62%	44%	25%	9%

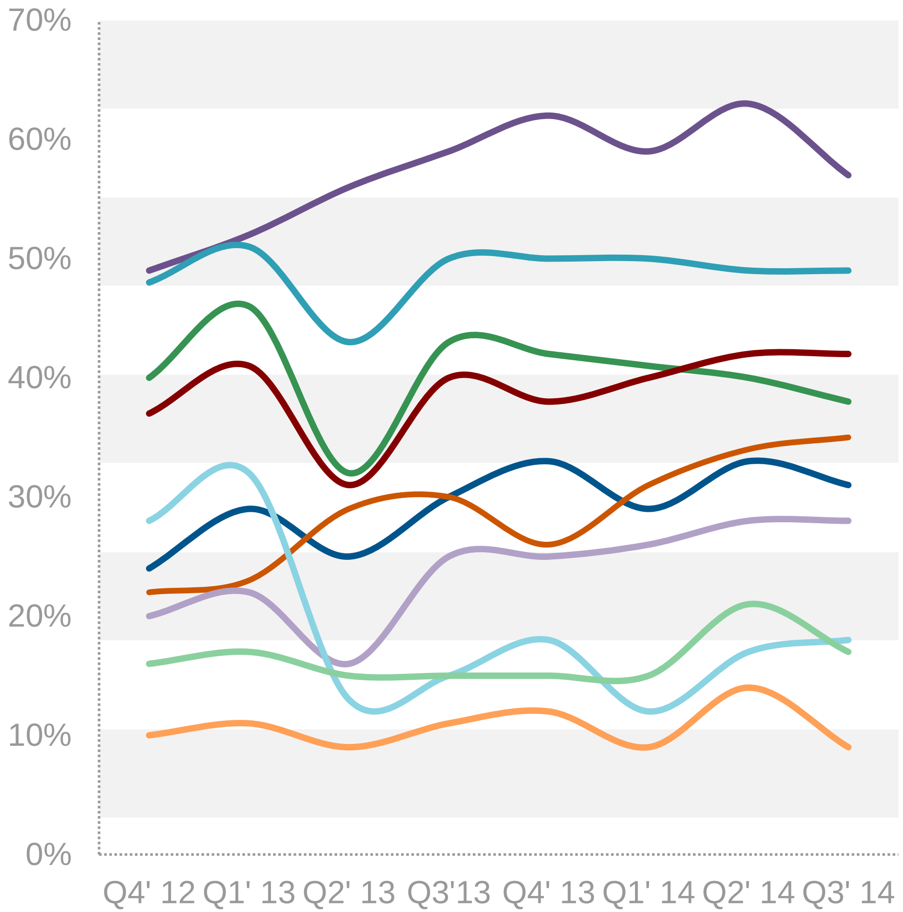
0-49% 50-69% 70-100%

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

Source: Ipsos MORI

CHANGING WAYS SMARTPHONE IS USED

USE OF SMARTPHONE IN THE PAST 3 MONTHS



57% Read or send emails

49% Visit social networking sites

42% Download apps for free

38% Browse websites for personal interests

35% Online banking

31% Watch video clips on sites such as Youtube

28% Online shopping

18% Use instant messaging services such as BBM

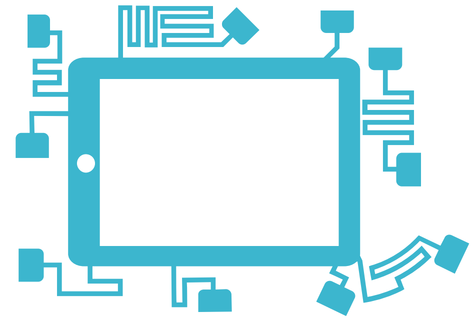
17% Download/stream music over the internet

9% Watch catch-up TV

Base: circa 430-650 smartphone owners per wave

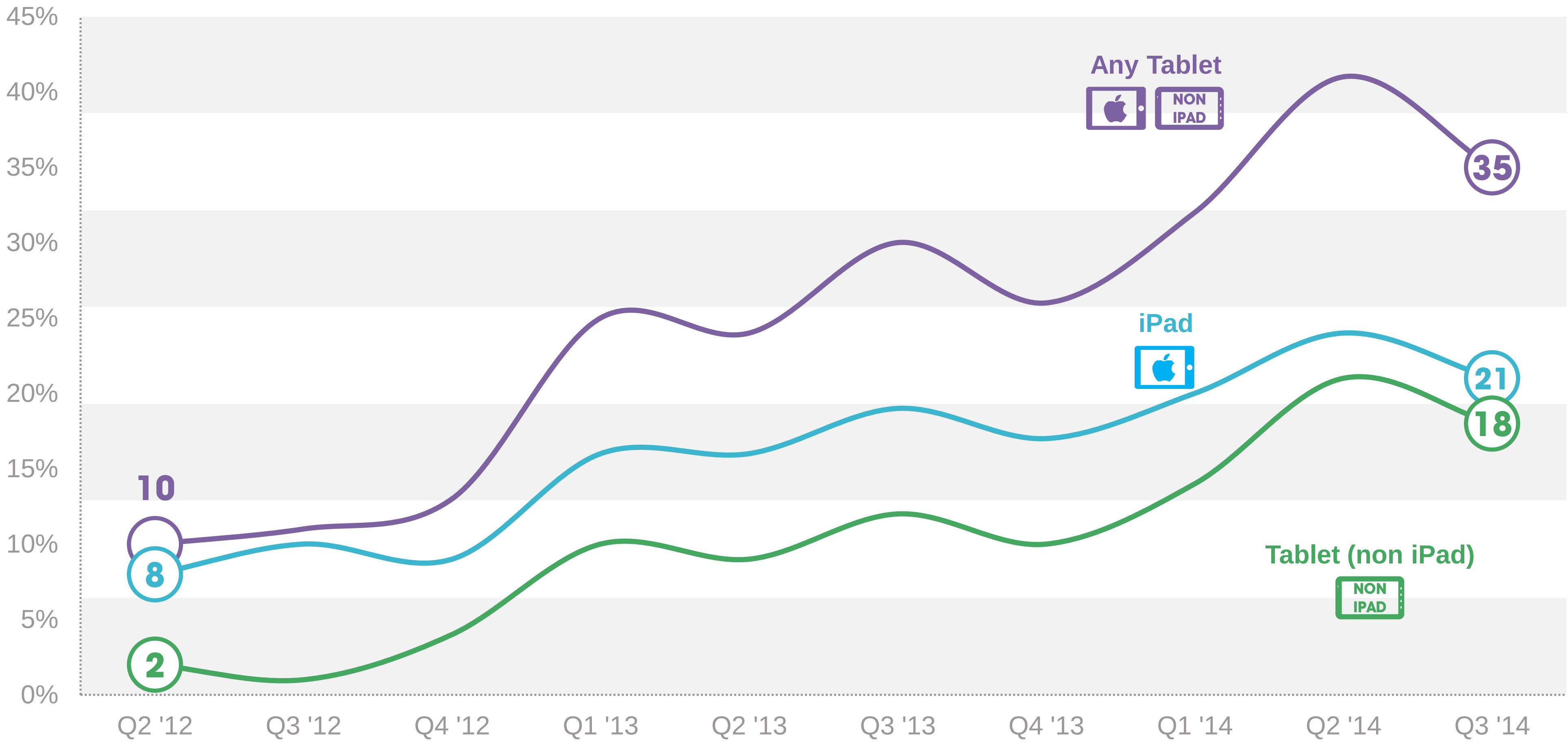
Source: Ipsos MORI

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 2013/2014

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	36%	37%	38%	44%	43%	36%	20%
Males AB	51%	54%	53%	64%	62%	49%	28%
Males C1	42%	38%	41%	54%	43%	50%	29%
Males C2	29%	37%	38%	27%	39%	22%	12%
Males DE	18%	24%	27%	18%	13%	14%	14%
Females	34%	37%	48%	47%	40%	31%	13%
Females AB	47%	48%	55%	55%	56%	43%	27%
Females C1	35%	40%	57%	49%	40%	28%	13%
Females C2	33%	40%	43%	45%	30%	37%	12%
Females DE	22%	30%	20%	35%	24%	17%	9%

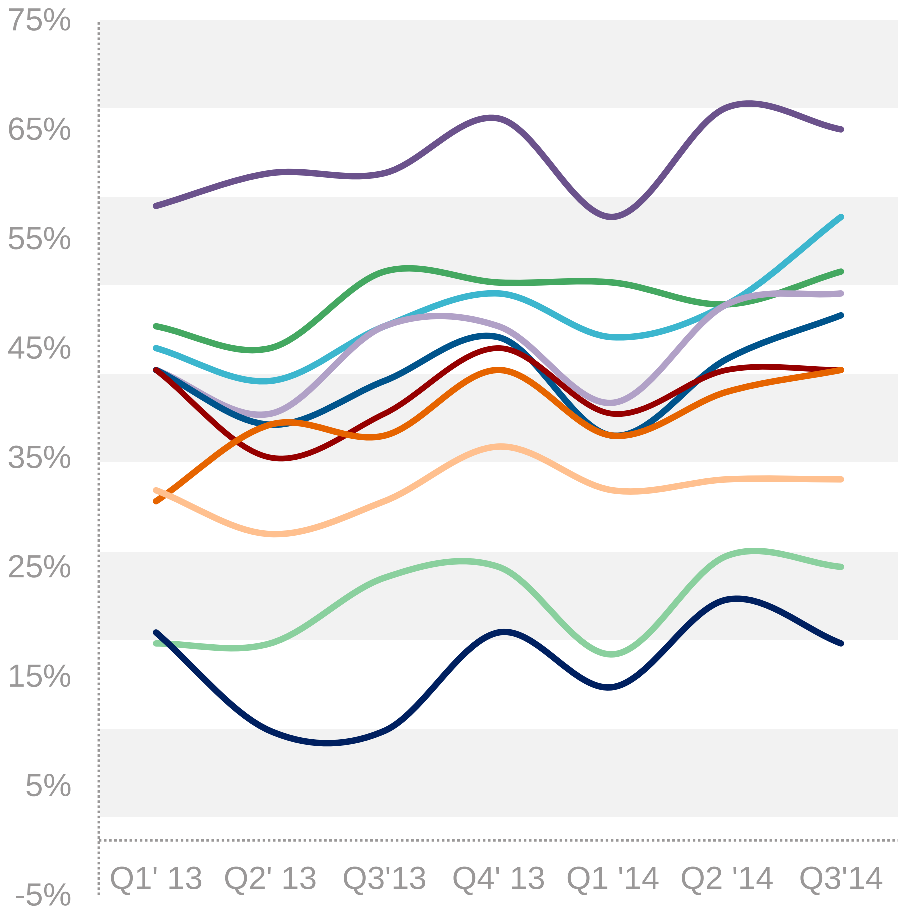
0-24% 25-49% 50-100%

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

Source: Ipsos MORI

CHANGING WAYS TABLET IS USED

USE OF TABLET IN THE PAST 3 MONTHS

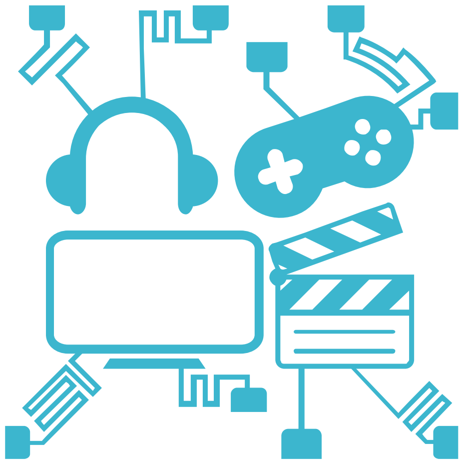


65% Read or send emails
57% Visit social networking sites
52% Browse websites for personal interests
50% Online shopping
48% Watch video clips on sites such as YouTube
43% Download apps for free
43% Online banking
33% Watch catch-up TV
25% Download/stream music over the internet
18% Use the internet to make video calls (VOIP)

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

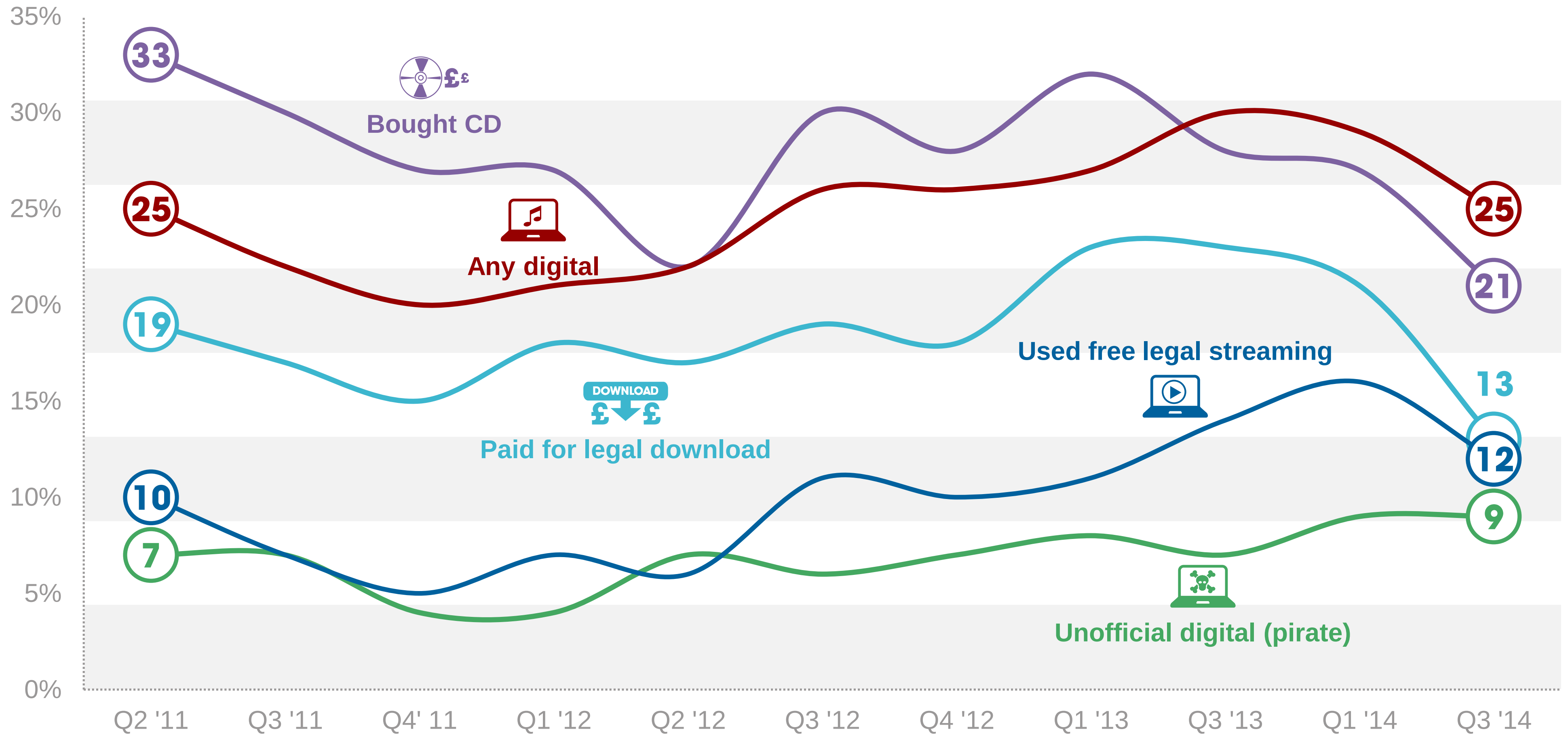
Source: Ipsos MORI

CONTENT CONSUMPTION
MUSIC / GAMES / TV / MOVIES



HOW WE CONSUME MUSIC

MUSIC CONSUMPTION

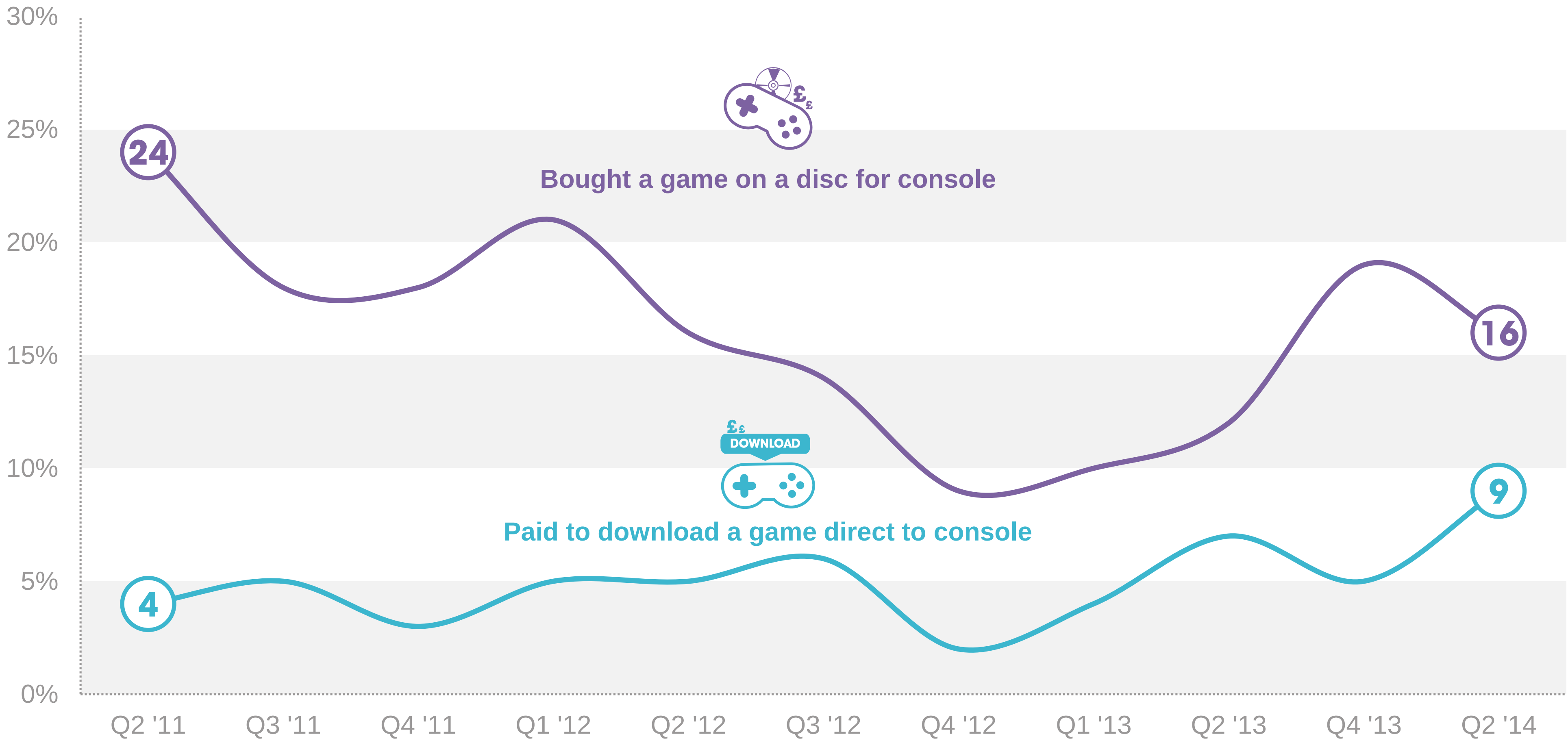


Base: circa 1,000 GB adults aged 15+ per wave / Music consumption is tracked every 6 months

Source: Ipsos MORI

HOW WE CONSUME GAMES FOR CONSOLES

GAMES CONSUMPTION

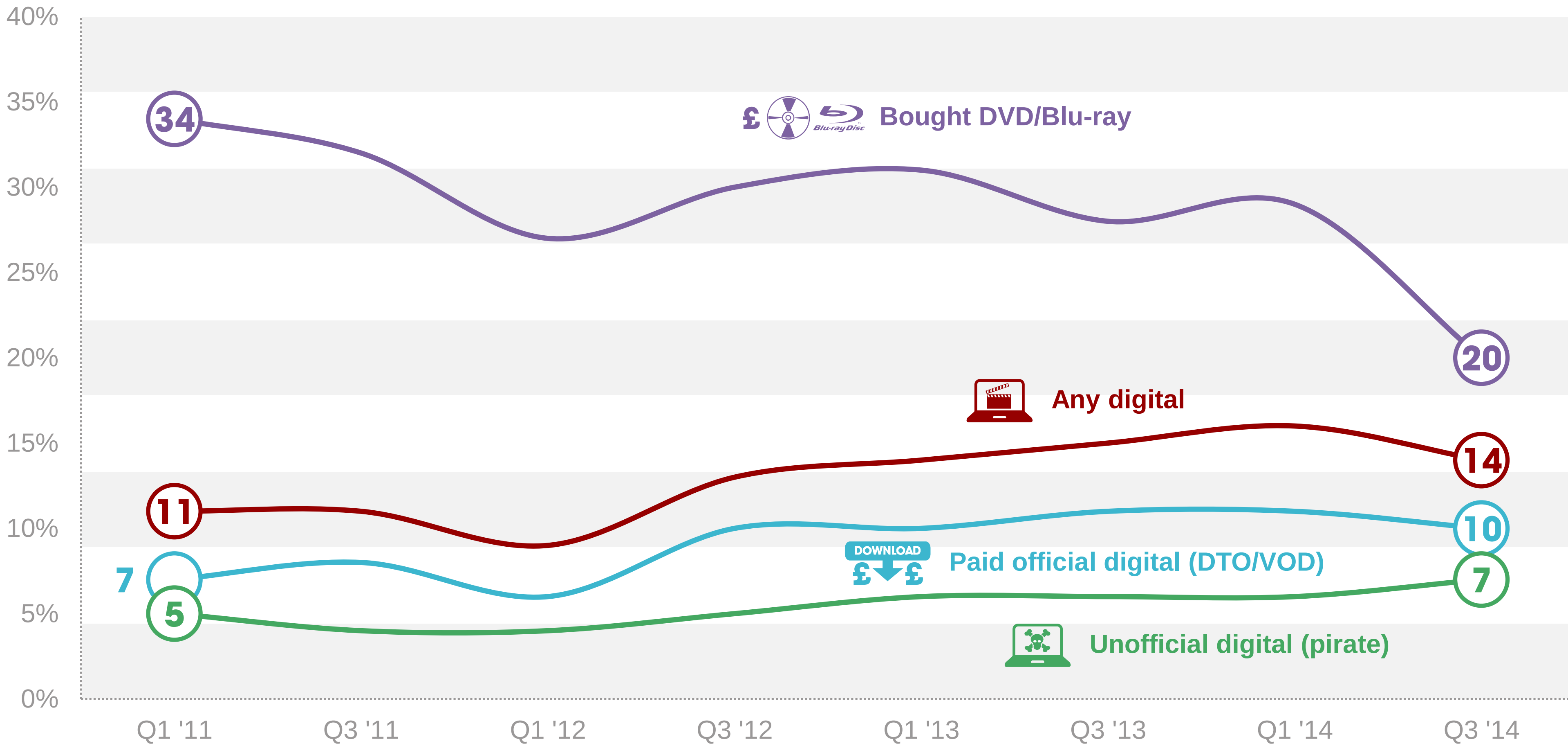


Base: circa 1,000 GB adults aged 15+ per wave / Games consumption is tracked every 6 months

Source: Ipsos MORI

HOW WE ACCESS MOVIES

MOVIE CONSUMPTION

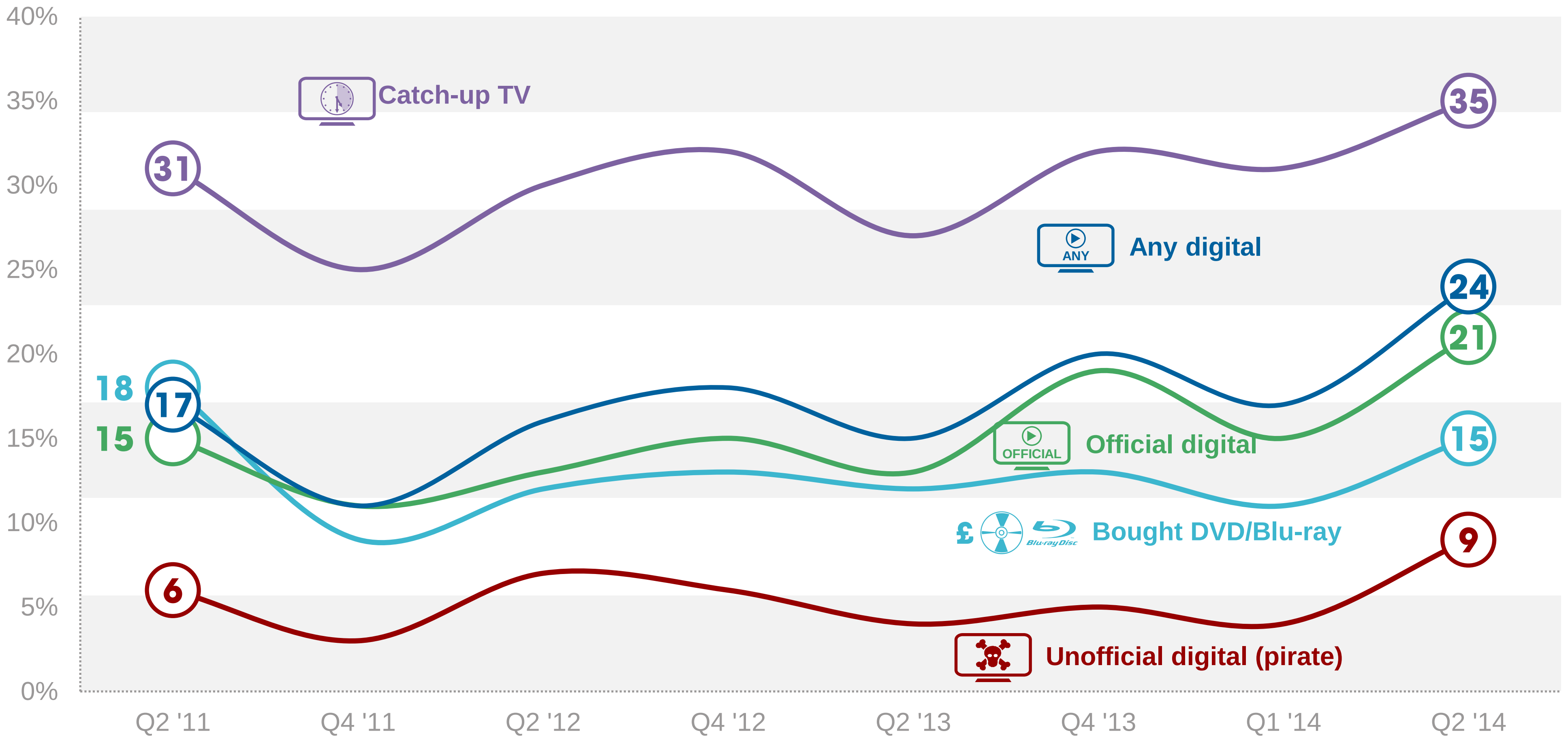


Base: circa 1,000 GB adults aged 15+ per wave / Movie consumption is tracked every 6 months

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

TECH TRACKER TECHNICAL DETAILS

Ipsos MORI interviewed a quota sample of **988 adults aged 15+ in GB.**

The latest interviews were carried out face to face **11th July – 18th July 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

For more information please contact:

Andrew Maguire
e: Andrew.Maguire@ipsos.com
Ipsos MORI
Kings House
Kymberley Road
Harrow HA1 1PT

t: +44 (0)20 861 8025
f: +44 (0)20 8861 5515

www.ipsos-mori.com/mediact

@IpsosMediaCT

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.

Winner - 2011 MRS Awards: “Best Innovation”