Ipsos MediaCT
The Media, Content and Technology Research Specialists

Ipsos

TECH TRACKER

QUARTERLY RELEASE: Q4 2013

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 2013 (Field in November)

REPRESENTATIVE SAMPLE OF
1000 GB ADULTS
AGED 15+

AREAS COVERED

- Internet usage
- Connected home
- Social networking
- Smartphone ownership
- Tablet ownership
- Content consumption
  Music / games / TV / movies
- Future Tech Monitor

HEADLINES

Internet usage

The proportion of adults accessing the internet is at 84%, with 55% now accessing via a mobile.

The top activities online remain: accessing email (78%), browsing for information on hobbies (67%), researching products and services (62%) and online shopping (57%).

Connected home

The percentage of households with connected TV has fallen to 11% of GB adults.

38% of GB adults have at least one of the latest generation games consoles in their household which has increased in the past 3 waves, driven by a rise in Wii and XBOX 360 consoles, with PS3 and Wii U ownership remaining constant.

Social networking

53% of GB adults access social networking sites, 30% access via a Smartphone. 13% access via a Tablet and 2% access via an internet TV.

52% of all adults have used Facebook in the past 3 months. 15% have used Twitter. 18% use Google+ and 1 in 10 use Linked In

Smartphones

Smartphone ownership is 59%. Ownership of Android Smartphones has risen to 27%, and iPhone ownership is on par with this at 26%. BlackBerry has decreased to 7% and Windows has remained roughly level at 2%.

Tablets

Tablets ownership is around 1 in 4 households, of which two thirds 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.

Future Tech Monitor

Overall, awareness of new technologies is high - two thirds (65%) are aware of 4G, half aware of 3D printers, and over 40% are aware of cloud computing and contactless payment. Newer technologies also have strong awareness despite not being widely available for purchase (smartglasses and smartwatches at a third), but projection gaming is still relatively obscure with just 16% aware of it.

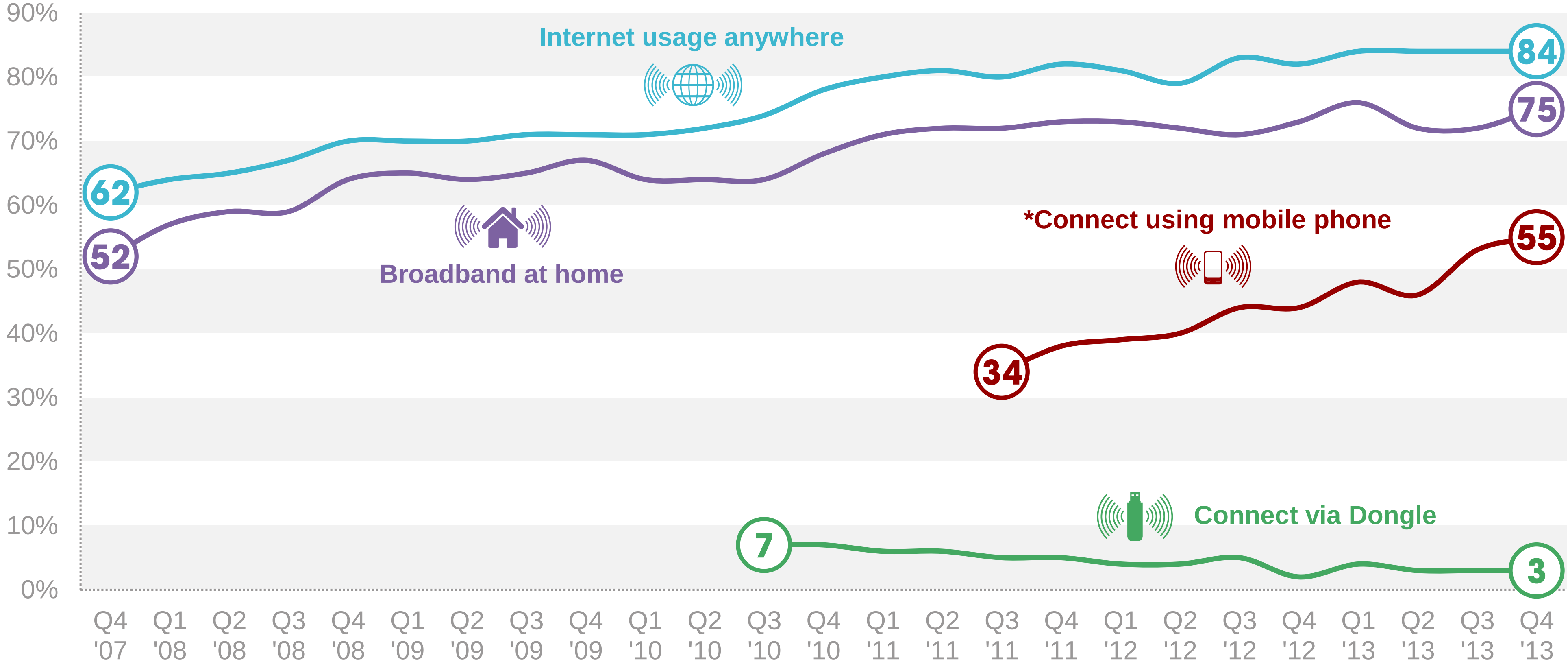
Despite high awareness, uptake is low for the majority of technologies – apart from cloud computing which has 34% usage amongst those aware, all other technologies sit below 10% ownership or usage.

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

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	86	98	96	94	89	83	61
Males AB	95	100	100	100	98	96	83
Males C1	94	100	97	100	97	92	75
Males C2	81	99	93	96	83	75	37
Males DE	72	91	93	74	73	56	31
Females	82	94	95	94	93	78	49
Females AB	92	100	98	97	100	92	75
Females C1	90	98	98	99	96	85	64
Females C2	78	91	91	90	94	75	37
Females DE	66	89	95	88	73	52	22

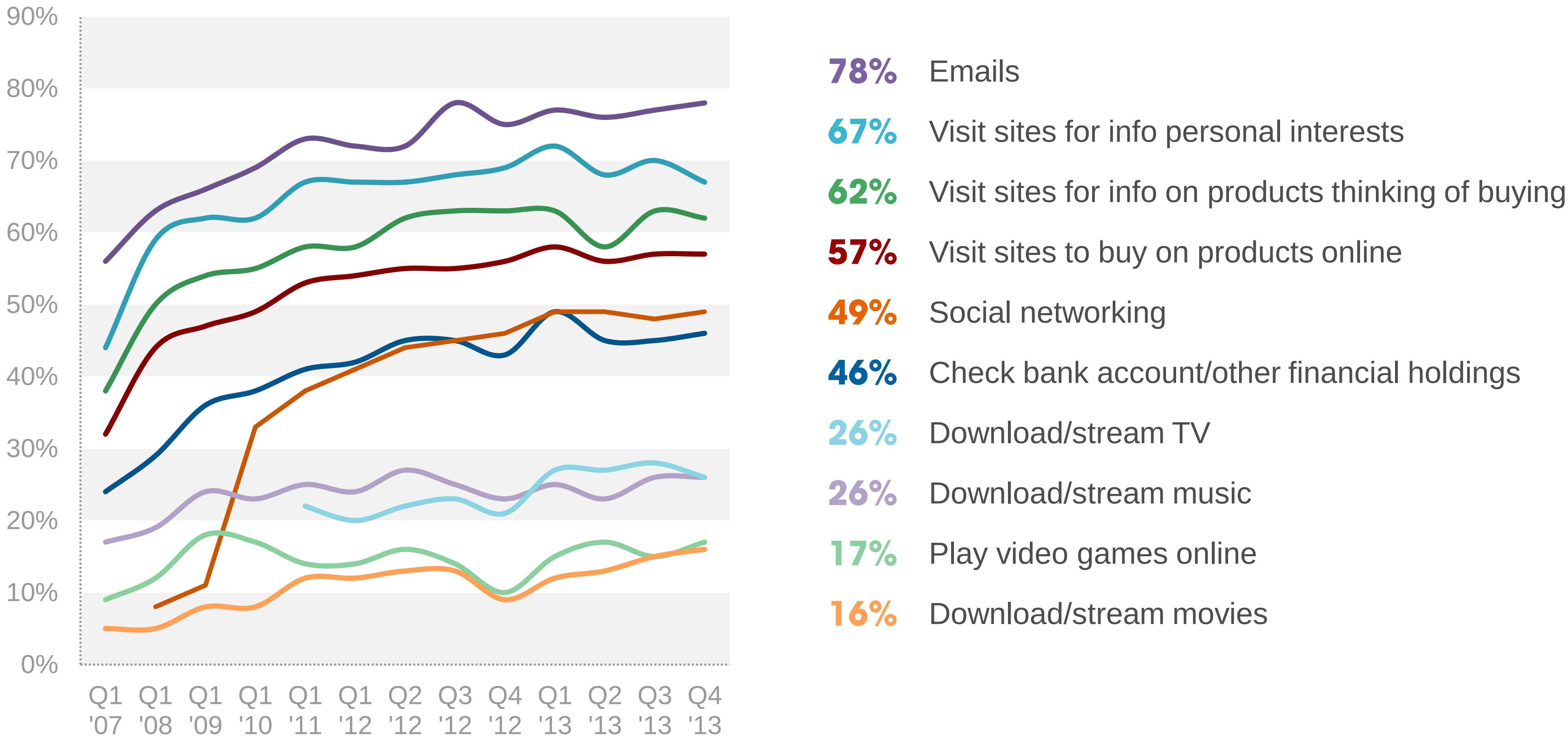
0-49% 50-79% 80-100%

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

Source: Ipsos MORI

CHANGING WAYS THE INTERNET IS USED

% USE OF THE INTERNET IN THE PAST 3 MONTHS



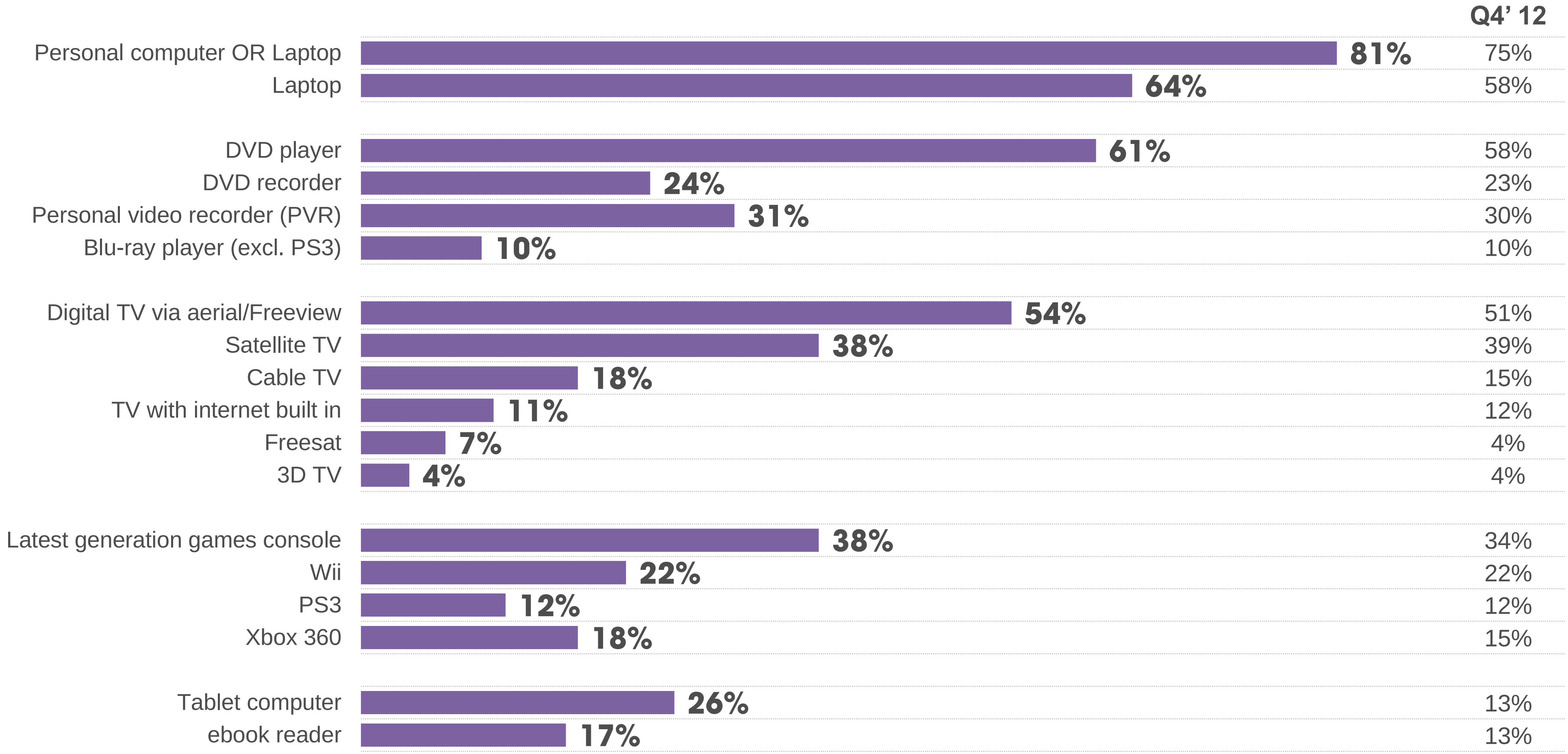
Base: circa 2,000 interviews per wave until Quarter 1 2010, circa 1,000 GB adults aged 15+ per wave thereafter

Source: Ipsos MORI

CONNECTED HOME

EQUIPMENT IN THE HOME

WHICH OF THE FOLLOWING DO YOU OWN/HAVE IN YOUR HOUSEHOLD?: Quarter 4 2013

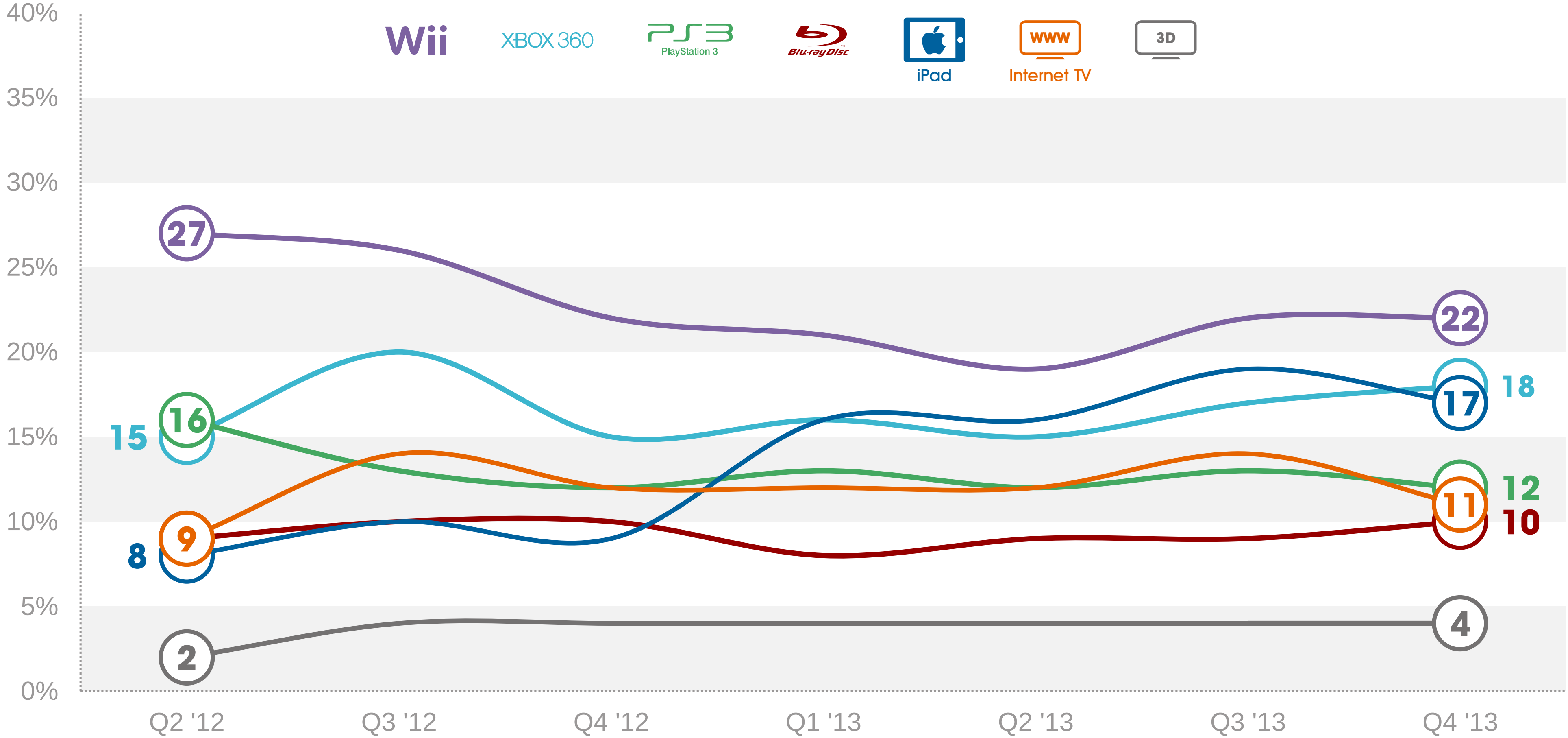


Base: circa 1,000 GB adults aged 15+: Quarter 4 2013

Source: Ipsos MORI

TRENDS IN EQUIPMENT OWNERSHIP IN THE HOME

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



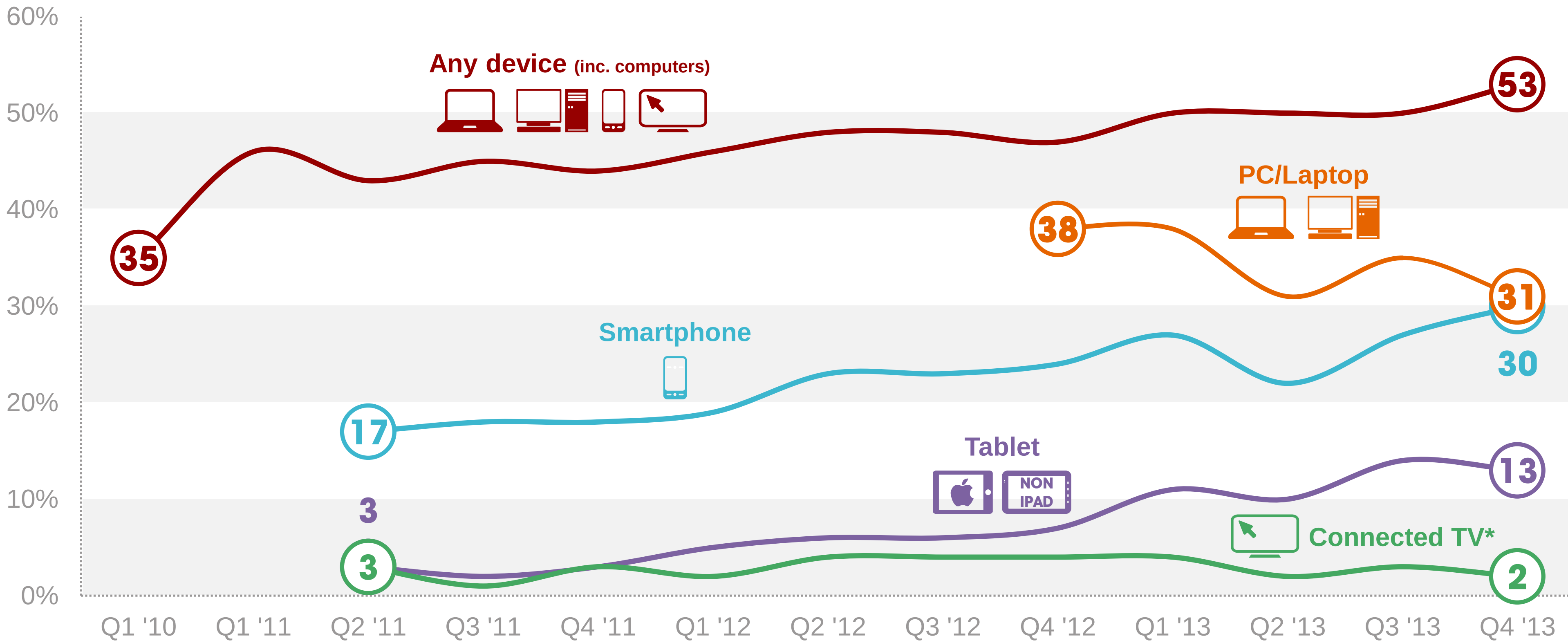
Base: circa 1,000 GB adults aged 15+ per wave

Source: Ipsos MORI

SOCIAL NETWORKING

TRENDS IN VISITING SOCIAL NETWORKING SITES

% VISITING SOCIAL NETWORKING SITES



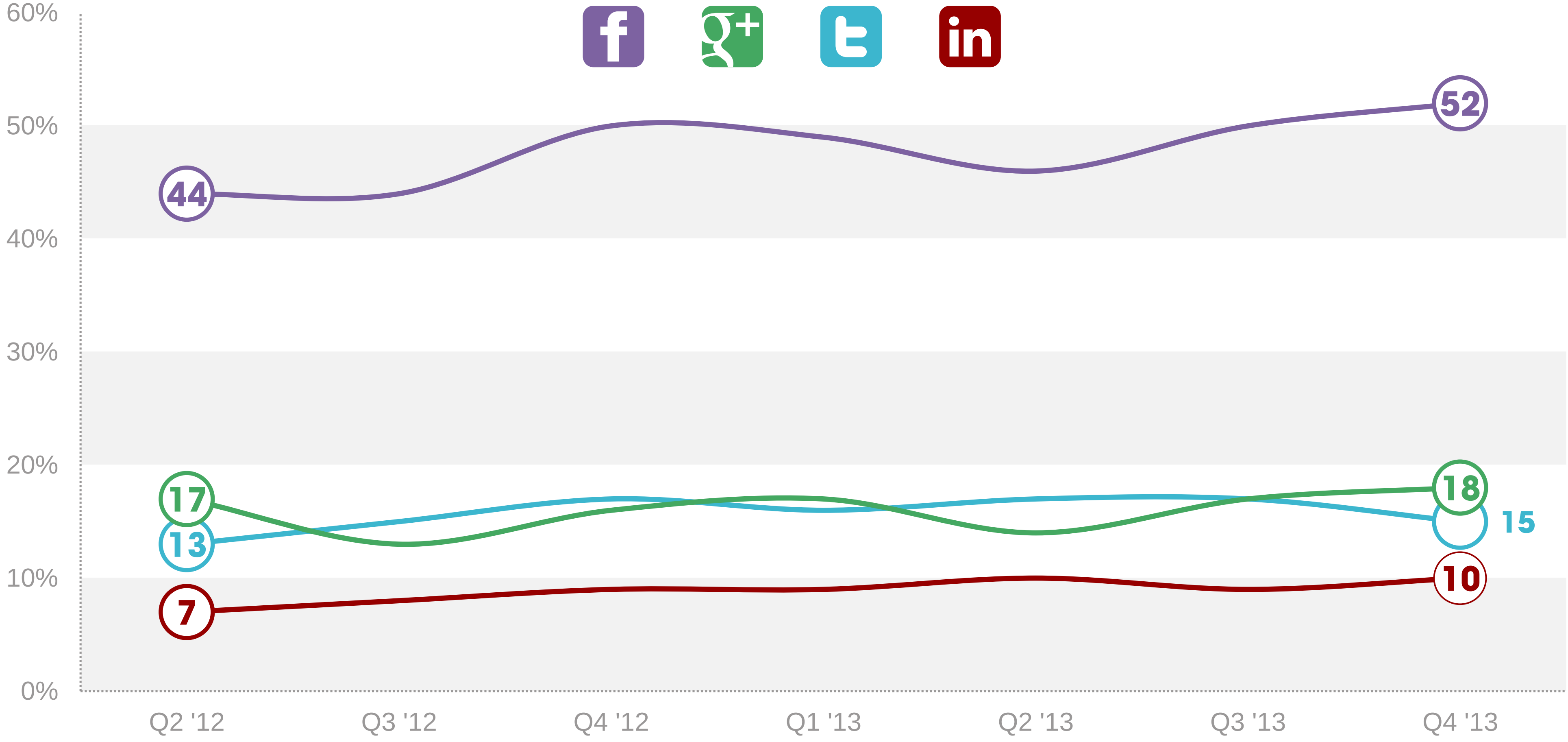
Connected TV* - Games console, web enabled TVs and PCs connected to a TV

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

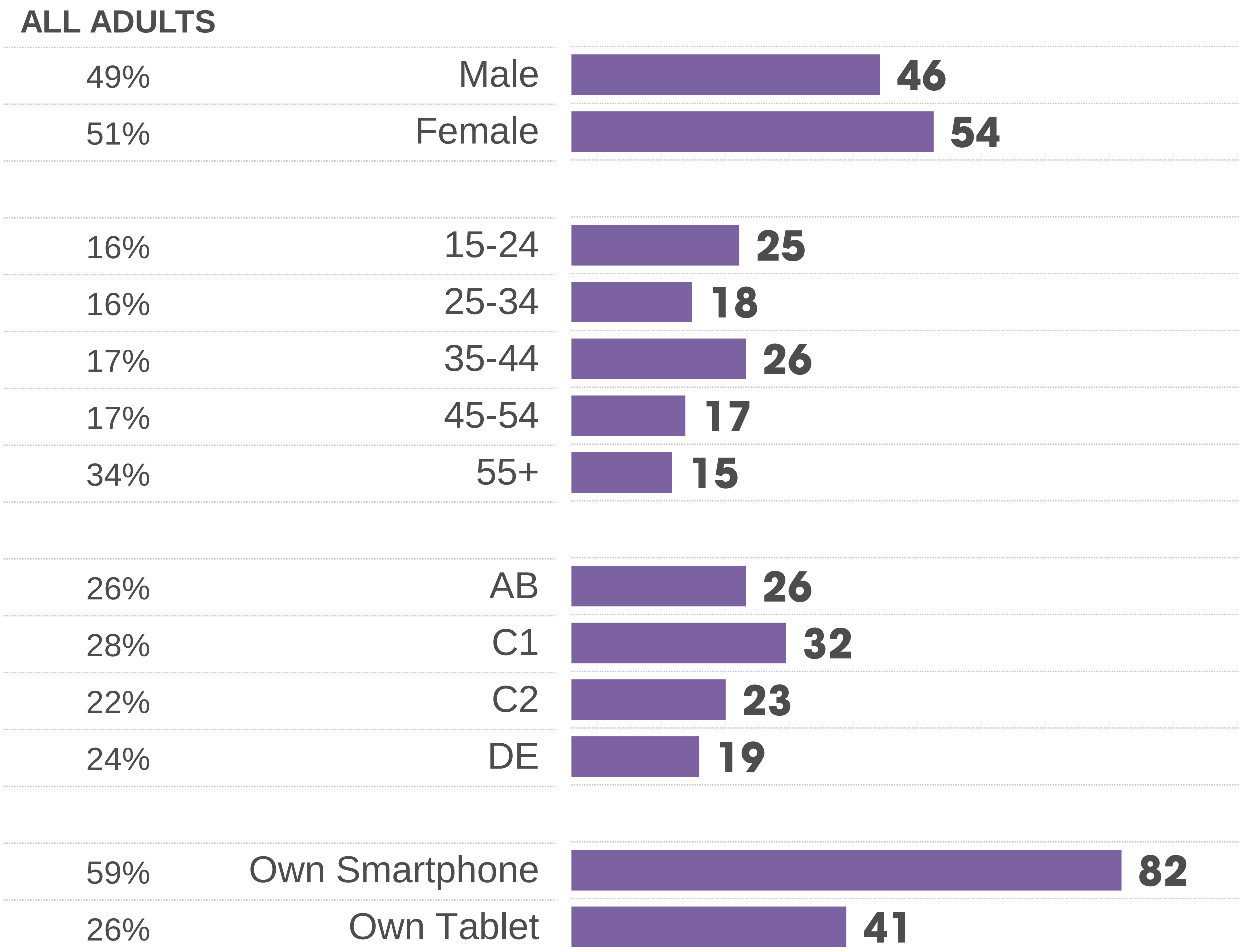
ALL ADULTS		Facebook users
49%	Male	48
51%	Female	52
16%	15-24	25
16%	25-34	22
17%	35-44	20
17%	45-54	16
34%	55+	17
26%	AB	28
28%	C1	32
22%	C2	19
24%	DE	21
59%	Own Smartphone	82
26%	Own Tablet	35

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 (478) : Q4 2013

Source: Ipsos MORI

PROFILE OF GOOGLE+ USERS



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 41%.

Base: circa GB adults (1,000) / All visiting / using Google+ in last 3 months (168) : Q4 2013

Source: Ipsos MORI

PROFILE OF TWITTER USERS

ALL ADULTS		
49%	Male	54
51%	Female	46
16%	15-24	32
16%	25-34	24
17%	35-44	27
17%	45-54	9
34%	55+	8
26%	AB	29
28%	C1	34
22%	C2	19
24%	DE	19
59%	Own Smartphone	96
26%	Own Tablet	49

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: 96% of them own a Smartphone, 49% a Tablet.

Base: circa GB adults (1,000) / All visiting / using Twitter in last 3 months (139) : Q4 2013

Source: Ipsos MORI

PROFILE OF LINKEDIN USERS

ALL ADULTS		
49%	Male	65
51%	Female	35
16%	15-24	14
16%	25-34	14
17%	35-44	28
17%	45-54	26
34%	55+	19
26%	AB	58
28%	C1	27
22%	C2	8
24%	DE	8
59%	Own Smartphone	89
26%	Own Tablet	52

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

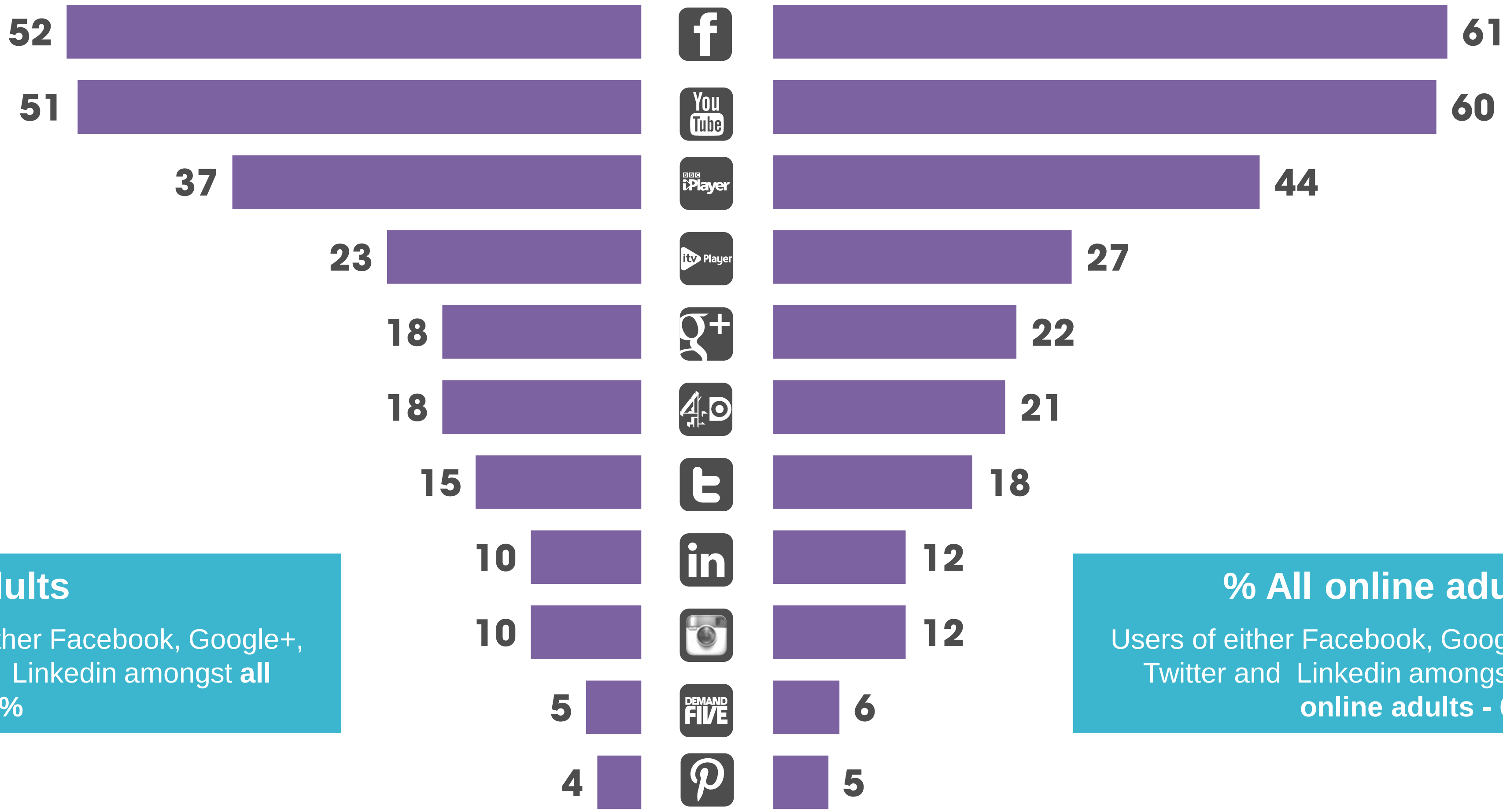
Consequently, the ownership level for a Tablet is twice that of the country average.

Base: circa GB adults (1,000) / All visiting / using Linkedin in last 3 months: (81) Q4 2013

Source: Ipsos MORI

WEBSITES VISITED OR USED IN THE LAST 3 MONTHS

% VISITED IN LAST 3 MONTHS – Quarter 4 2013



% All adults

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

% All online adults

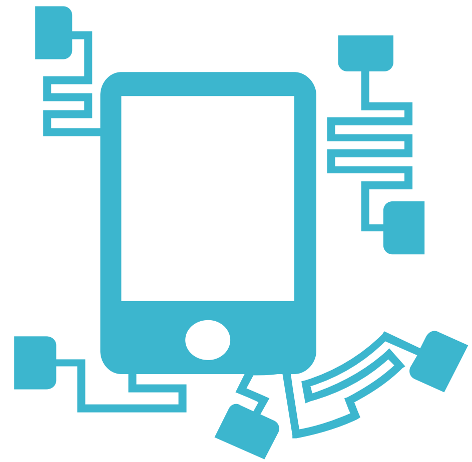
Users of either Facebook, Google+, Twitter and Linkedin amongst **all online adults - 68%**

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

Base: 789 GB online adults aged 15+: Q4 2013

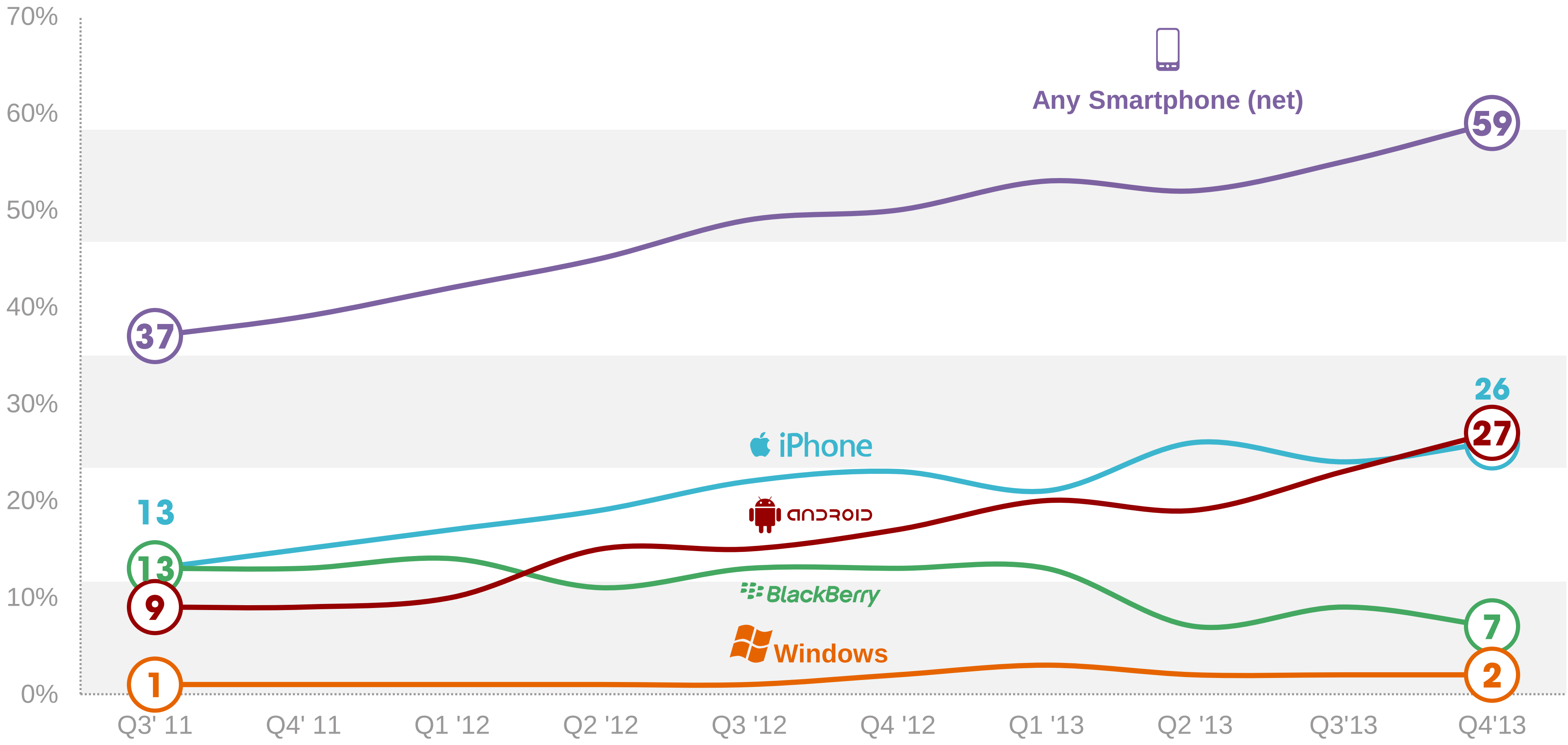
Source: Ipsos MORI

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

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	59	81	82	73	64	40	16
Males AB	64	78	92	86	82	51	23
Males C1	65	82	89	80	63	36	19
Males C2	56	81	83	59	58	38	9
Males DE	49	78	66	58	46	25	9
Females	50	80	74	71	51	28	12
Females AB	57	91	81	79	62	40	26
Females C1	56	85	86	74	51	34	7
Females C2	46	73	63	70	51	23	6
Females DE	41	74	65	56	35	10	8

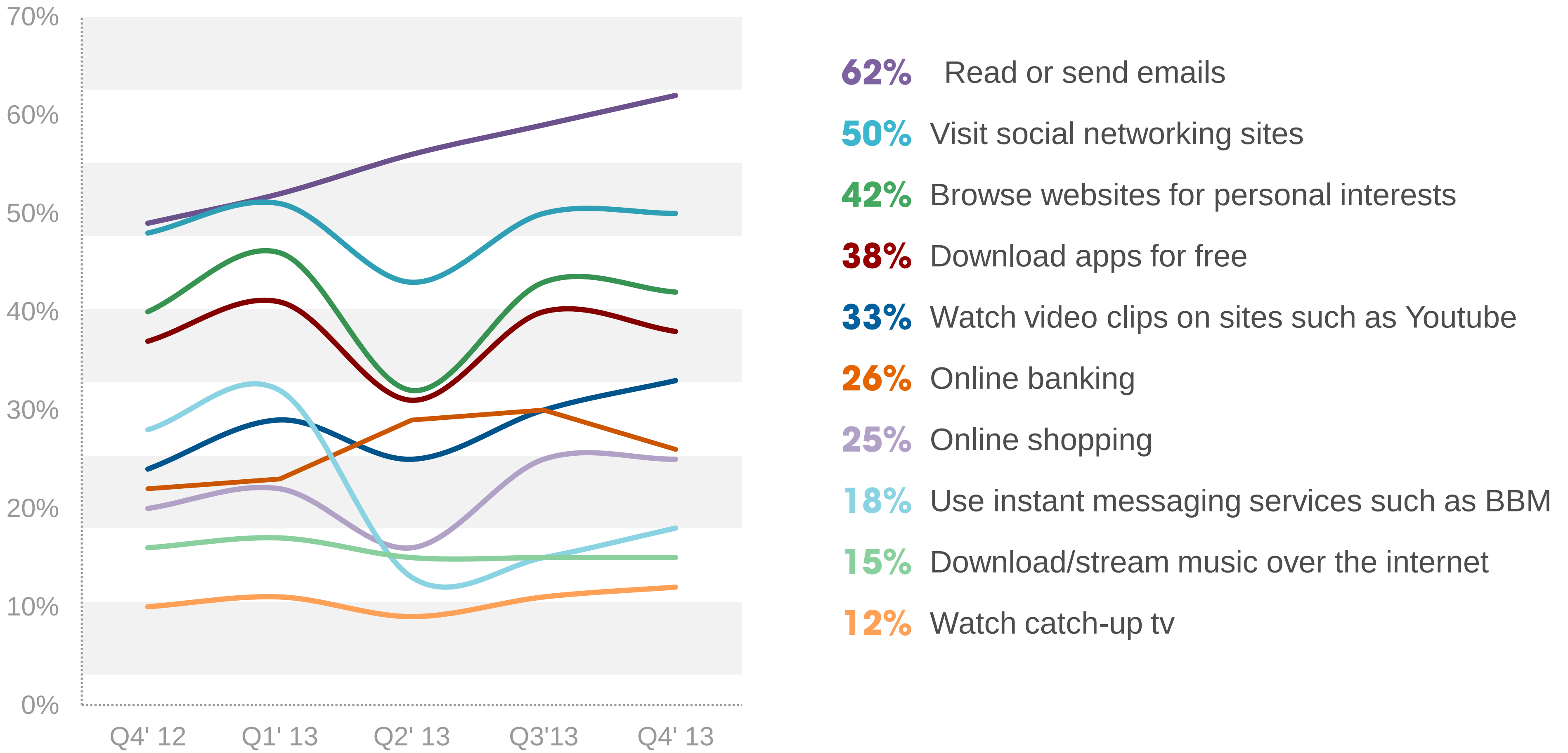
0-49% 50-69% 70-100%

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

Source: Ipsos MORI

CHANGING WAYS SMARTPHONE IS USED

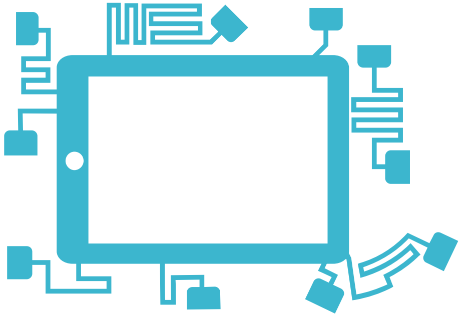
USE OF SMARTPHONE IN THE PAST 3 MONTHS



Base: circa 430-530 smartphone owners per wave

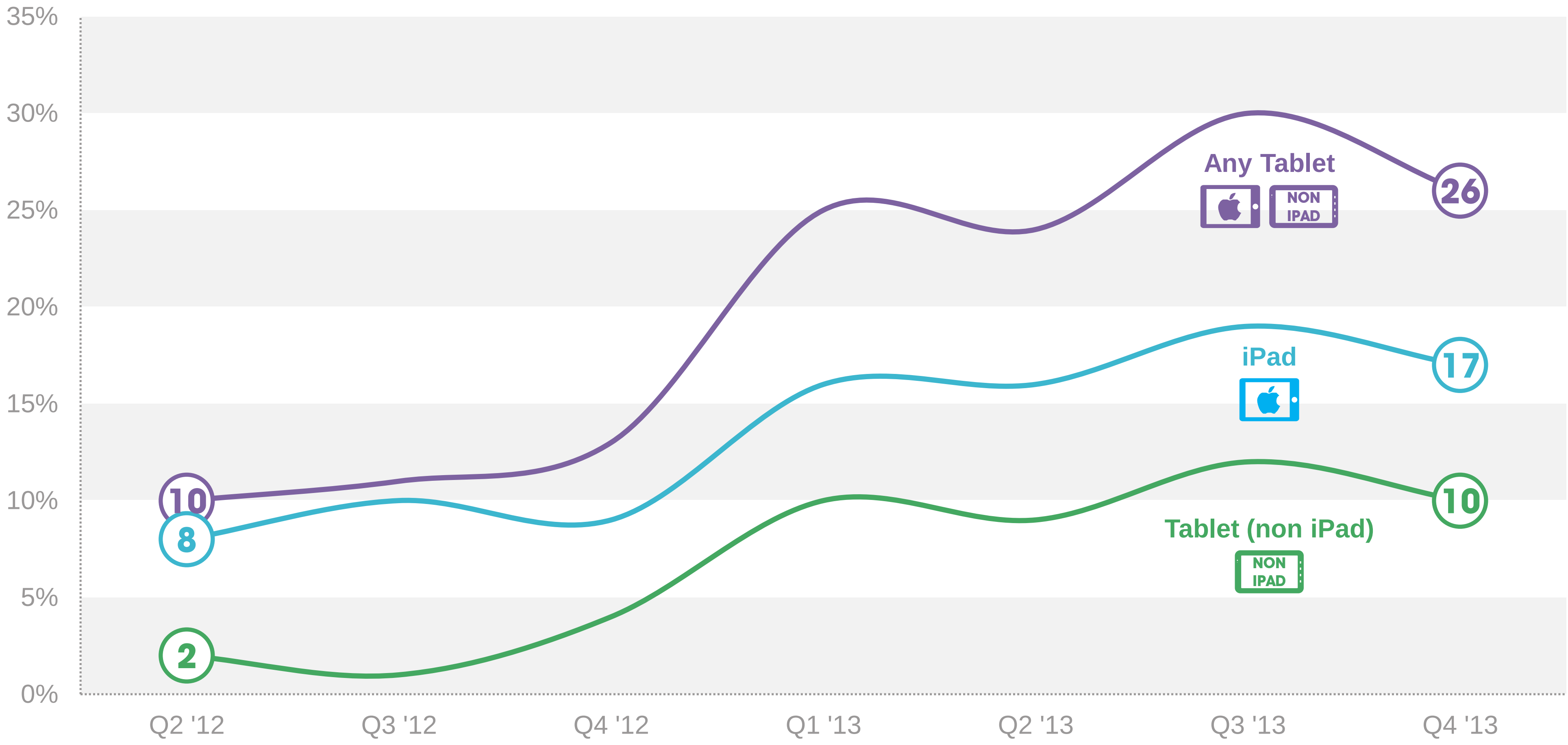
Source: Ipsos MORI

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 2012-2013

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	27	28	25	42	32	26	11
Males AB	44	38	48	73	49	39	18
Males C1	28	32	32	31	33	27	11
Males C2	18	24	16	21	26	17	5
Males DE	14	20	10	21	15	13	7
Females	25	26	29	38	29	21	11
Females AB	36	51	41	44	42	30	22
Females C1	27	30	39	42	26	19	9
Females C2	24	28	25	34	33	20	6
Females DE	13	12	16	25	10	12	8

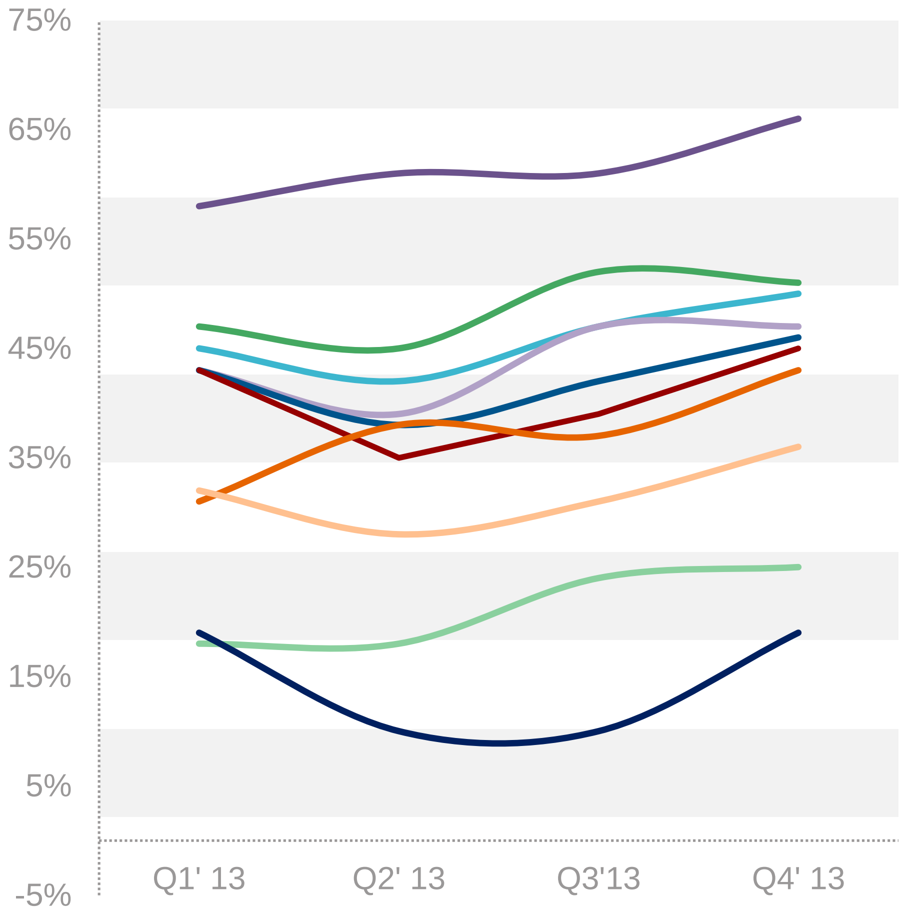
0-24% 25-49% 50-100%

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

Source: Ipsos MORI

CHANGING WAYS TABLET IS USED

USE OF TABLET IN THE PAST 3 MONTHS



66% Read or send emails

51% Browse websites for personal interests

50% Visit social networking sites

47% Online shopping

46% Watch video clips on sites such as Youtube

45% Download apps for free

43% Online banking

36% Watch catch-up tv

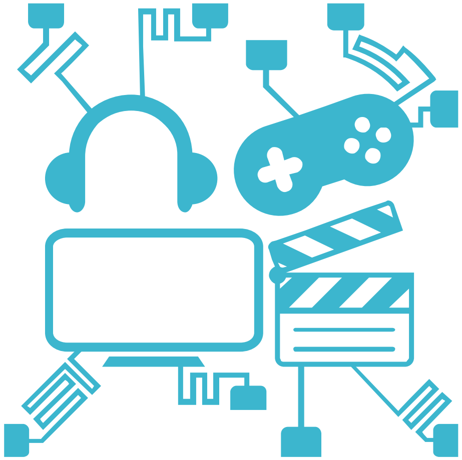
25% Download/stream music over the internet

19% Use the internet to make video calls (VOIP)

Base: circa 200 – 280 adults 15+ who own tablets

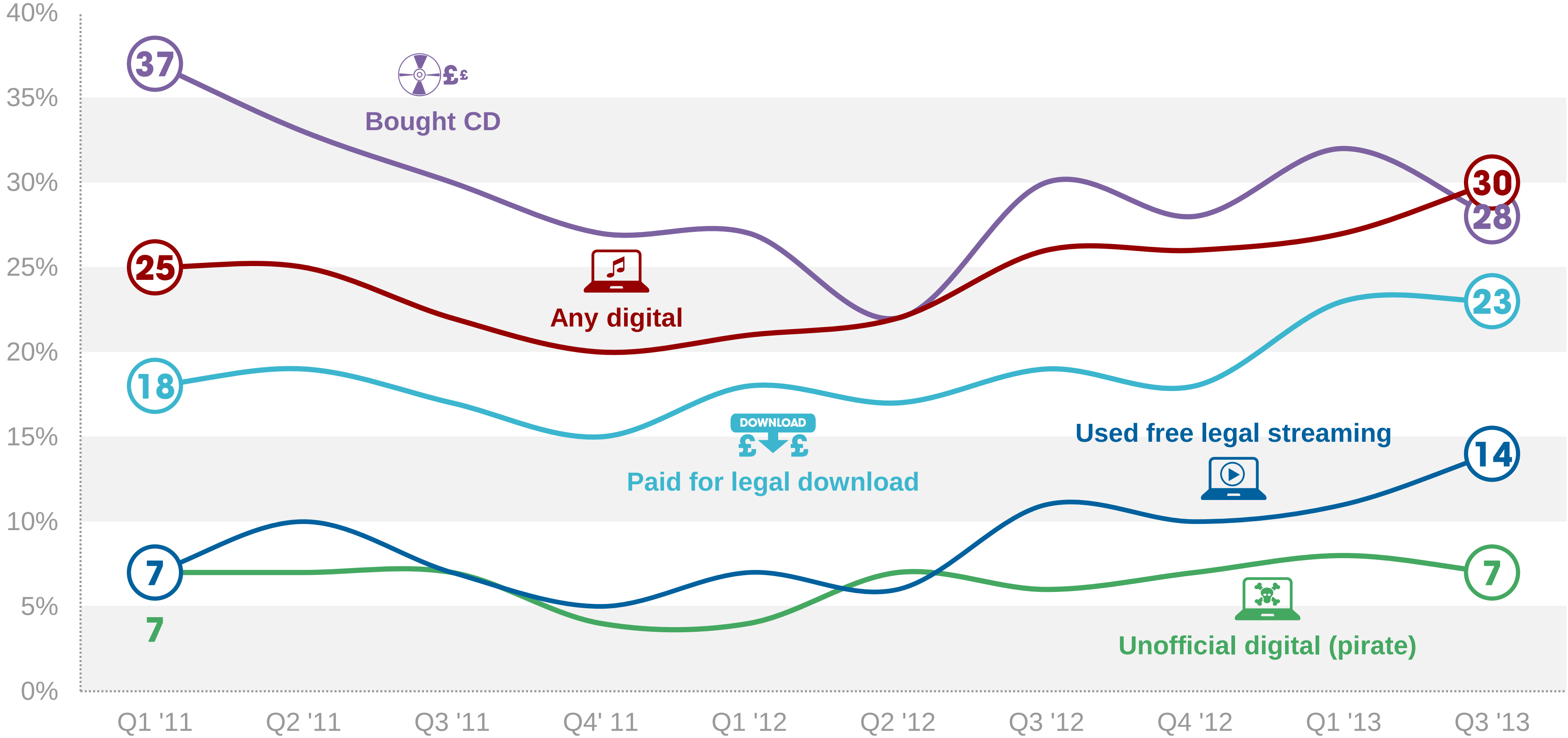
Source: Ipsos MORI

CONTENT CONSUMPTION
MUSIC / GAMES / TV / MOVIES



HOW WE CONSUME MUSIC

MUSIC CONSUMPTION

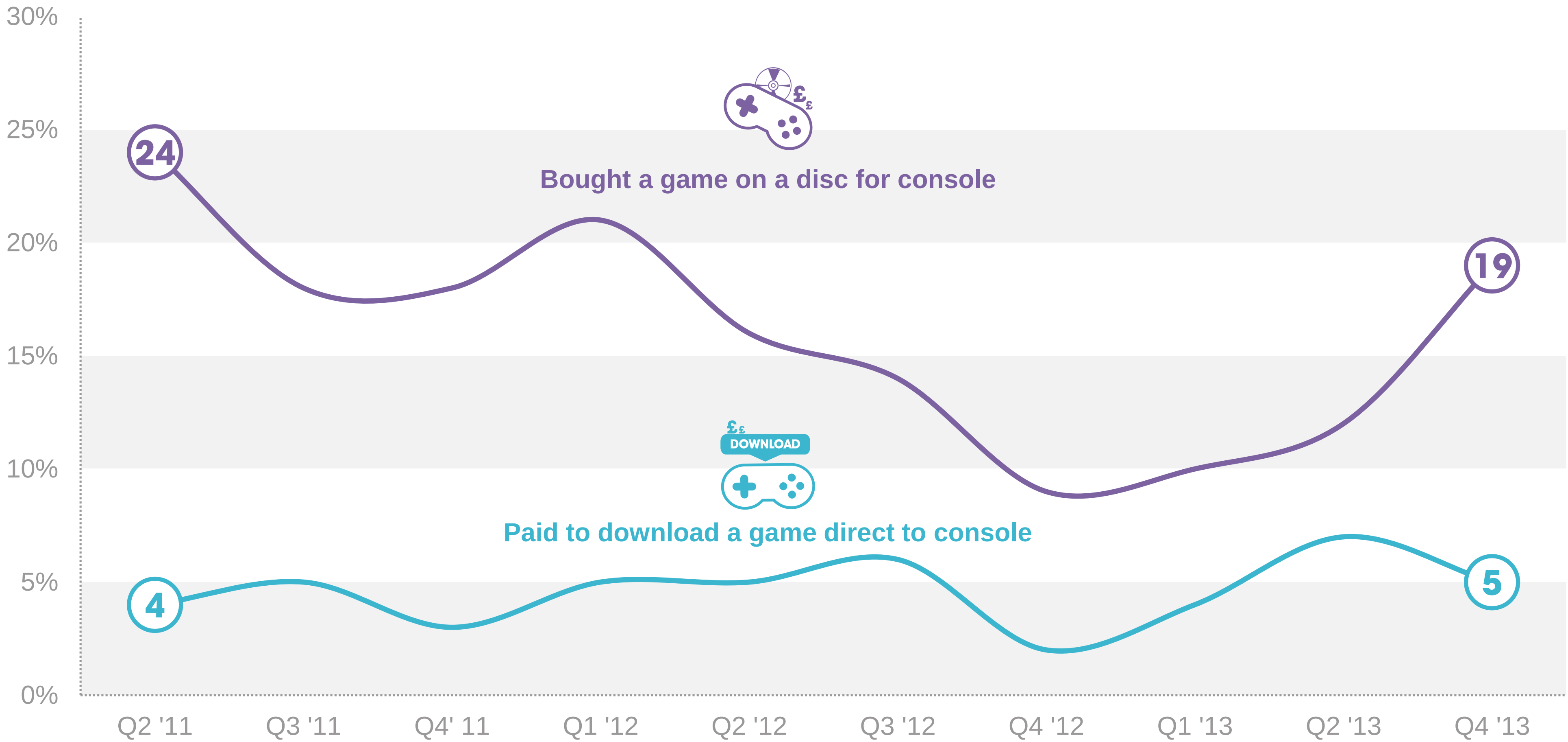


Base: circa 1,000 GB adults aged 15+ per wave / Music consumption is tracked every 6 months

Source: Ipsos MORI

HOW WE CONSUME GAMES FOR CONSOLES

GAMES CONSUMPTION

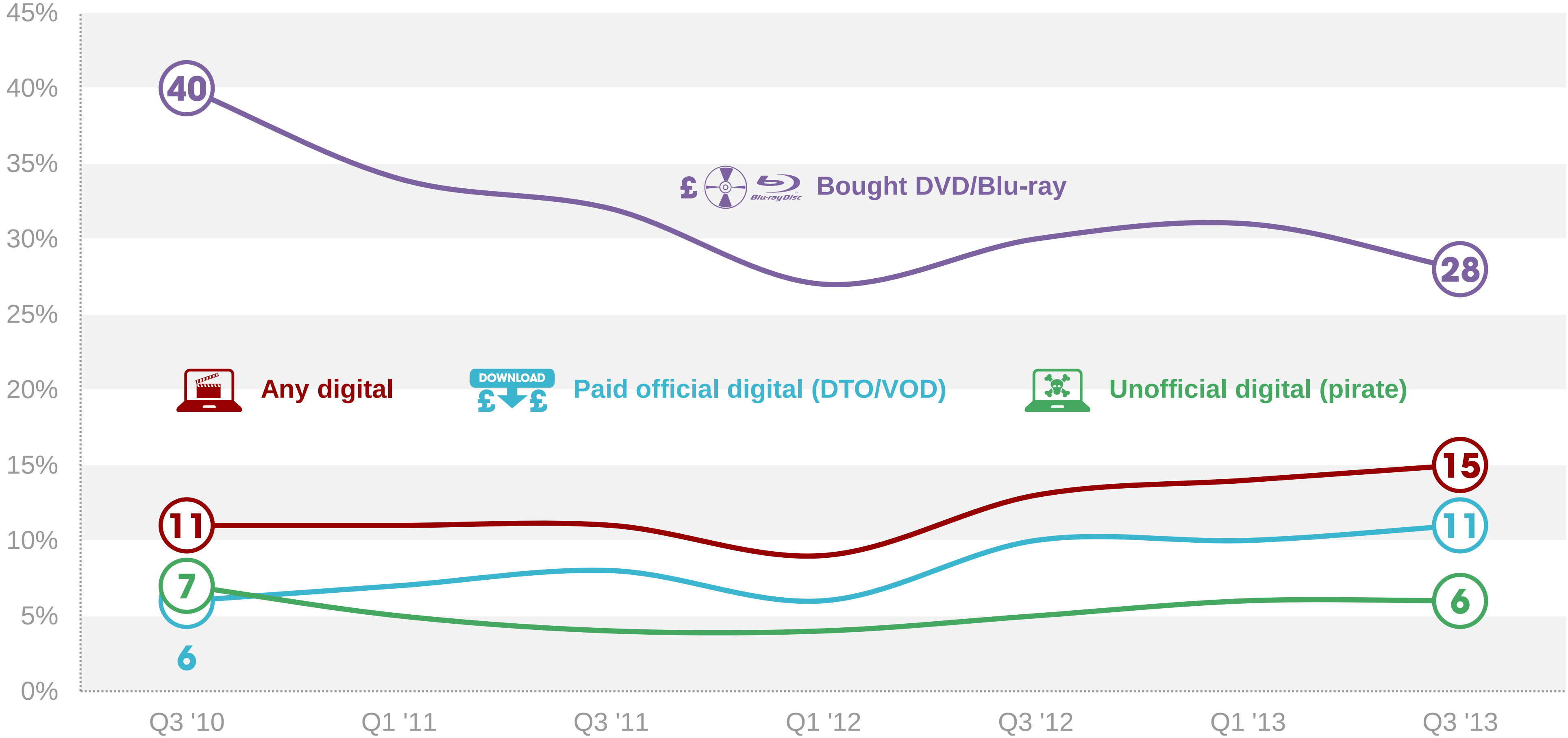


Base: circa 1,000 GB adults aged 15+ per wave / Games consumption is tracked every 6 months

Source: Ipsos MORI

HOW WE ACCESS MOVIES

MOVIE CONSUMPTION

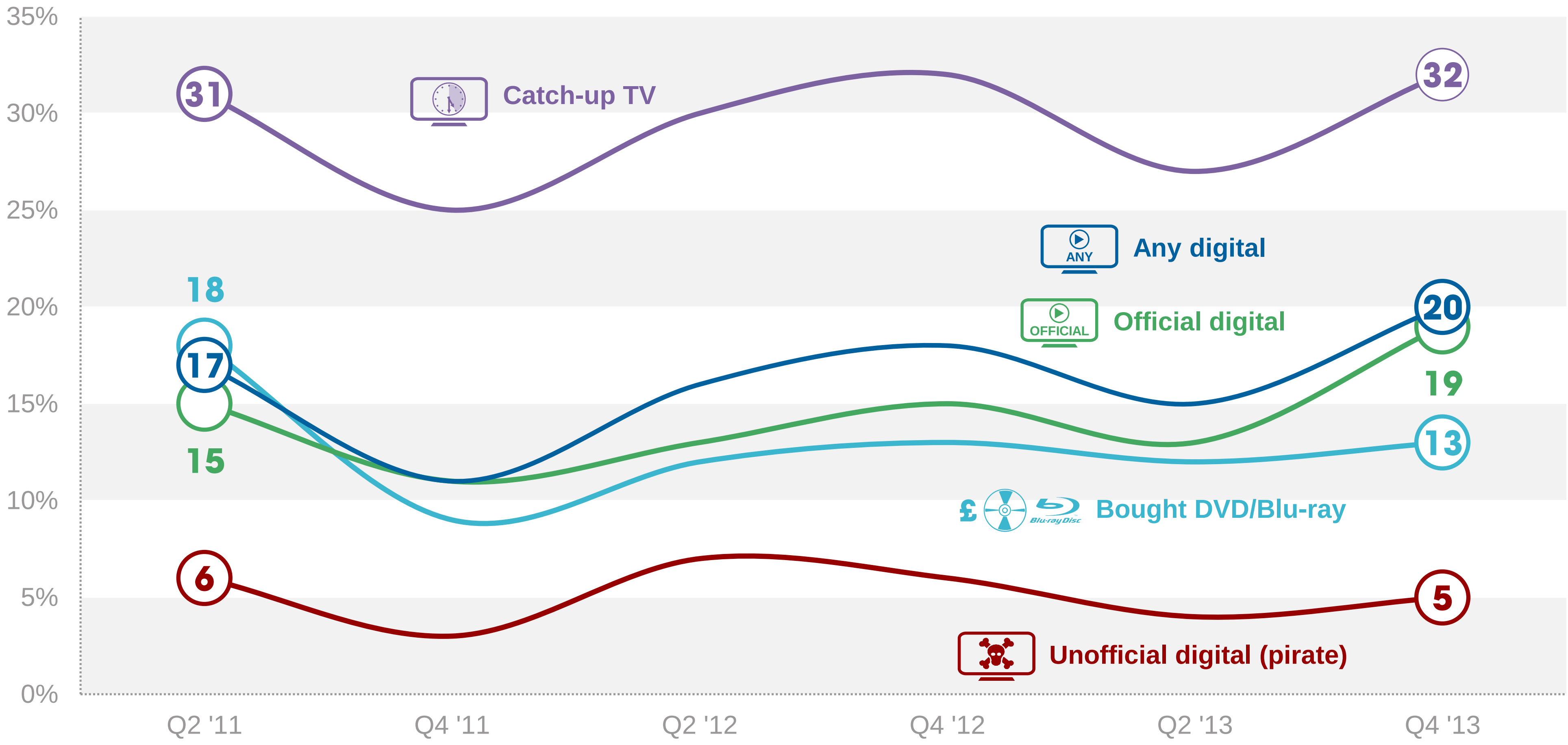


Base: circa 1,000 GB adults aged 15+ per wave / Movie consumption is tracked every 6 months

Source: Ipsos MORI

HOW WE ACCESS TV SERIES

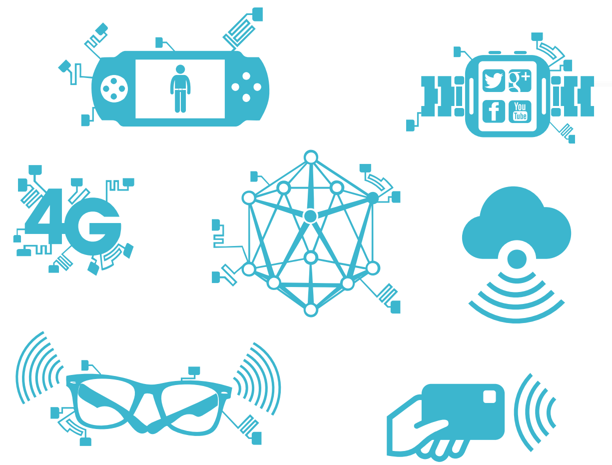
TV SERIES CONSUMPTION



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

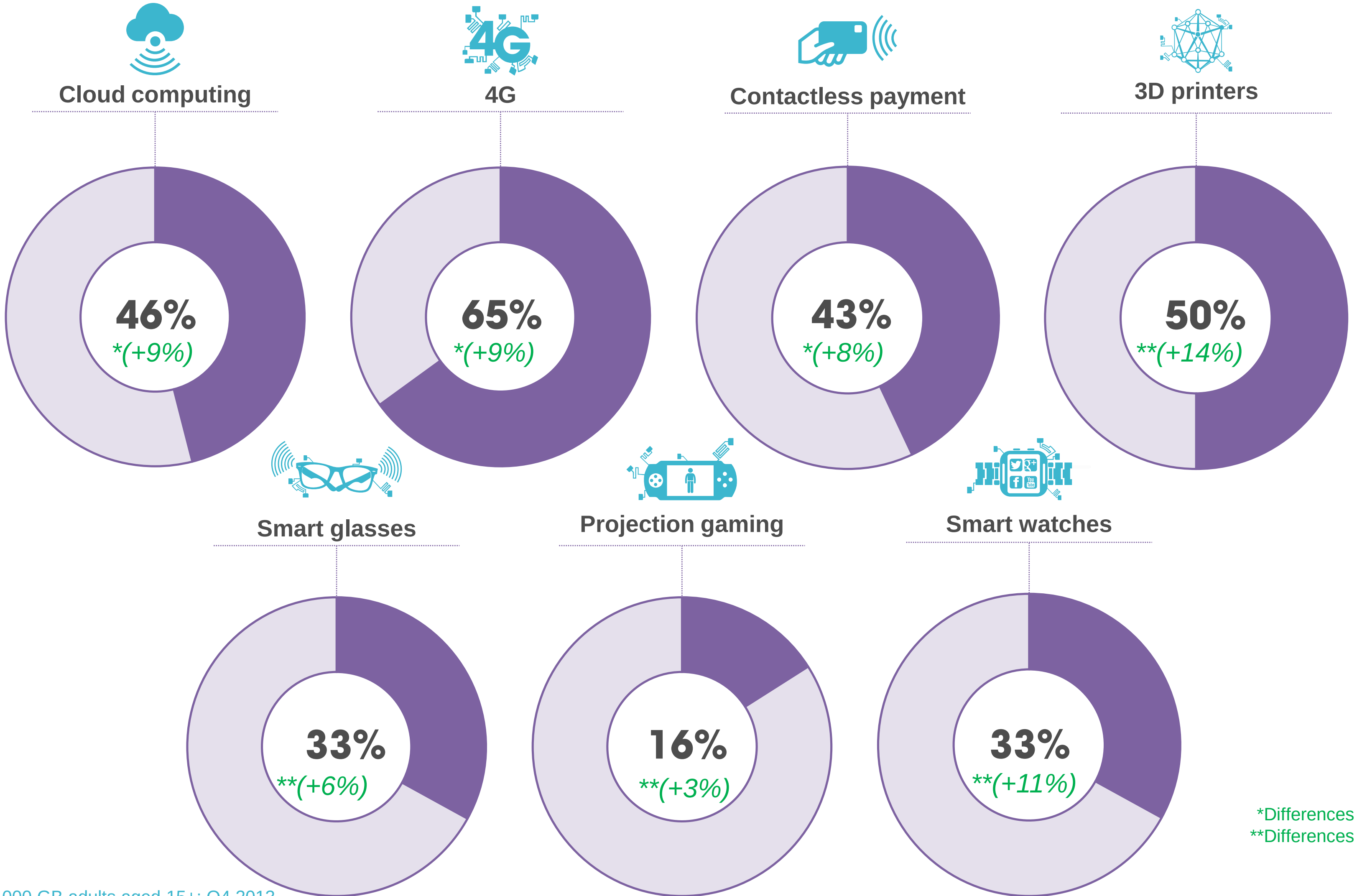
Source: Ipsos MORI

FUTURE TECH MONITOR



NEW TECHNOLOGY AND PRODUCT AWARENESS

% AWARE : Quarter 4 2013



*Differences compared to Q4 2012
**Differences compared to Q3 2013

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

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
All adults	46	65	43	50	33	16	33
Males	52	72	49	57	42	21	43
Females	40	59	38	43	23	10	23
15-34	47	79	48	53	43	26	41
35+	46	59	41	48	28	11	29
ABC1	58	74	54	59	39	16	38
C2DE	32	55	31	39	25	16	27

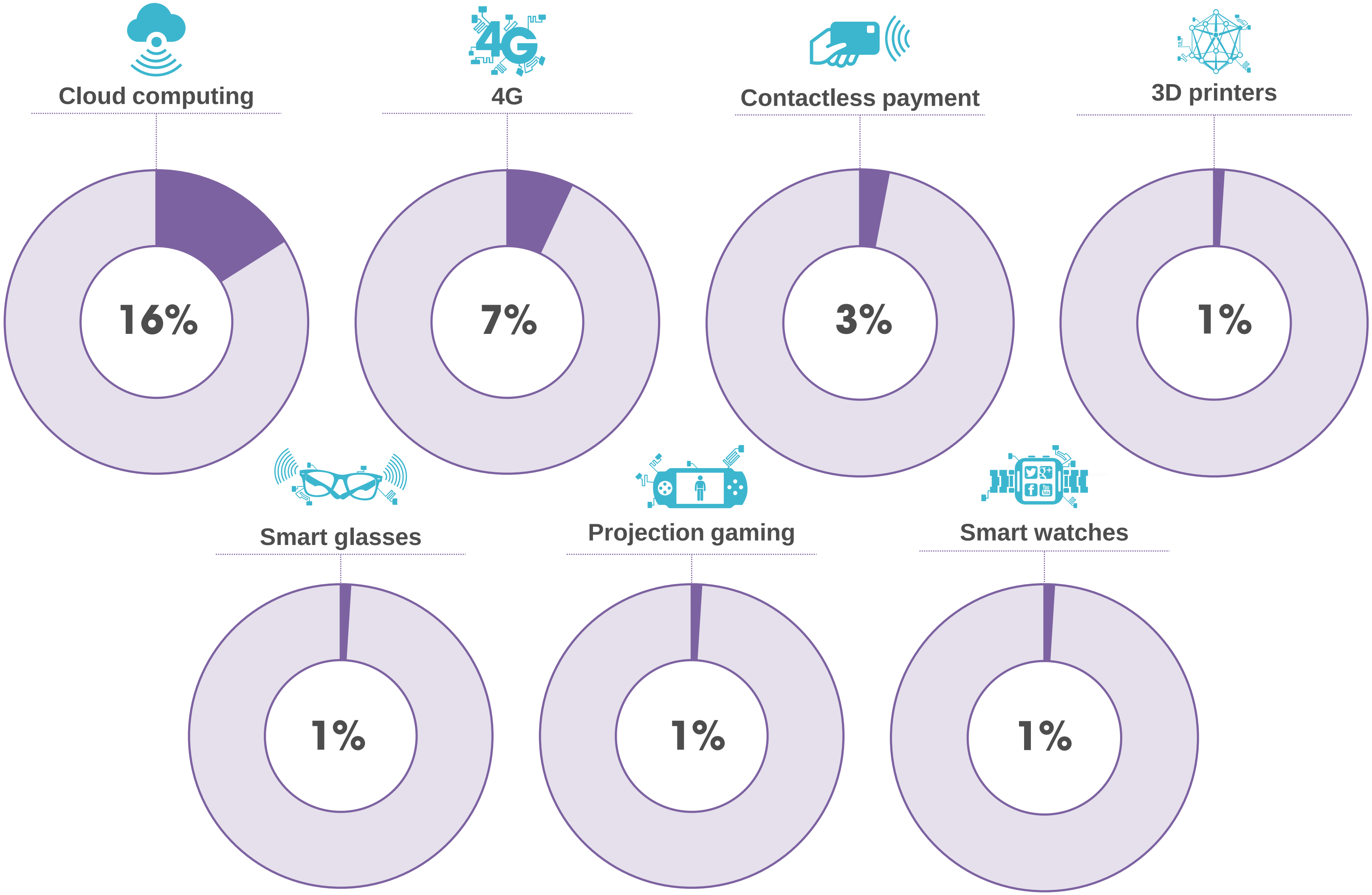
0-9% 10-24% 25-49% 50%+

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

Source: Ipsos MORI

OWNERSHIP OR USAGE

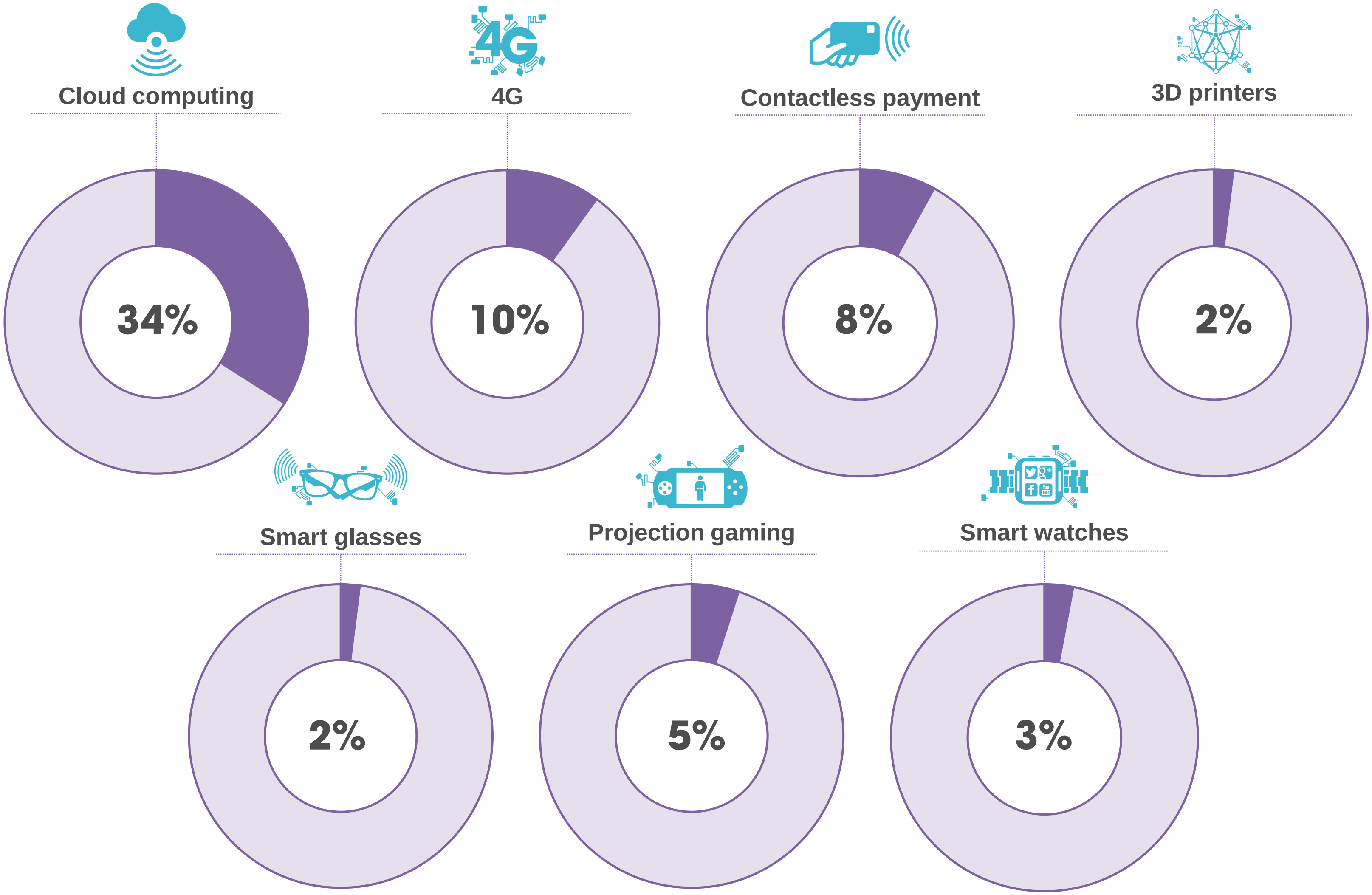
% USE/ OWN (AMONGST ALL): Quarter 4 2013



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

USE/ OWN IN DETAIL

% USE/ OWN (AMONGST AWARE): Quarter 4 2013



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)

TECH TRACKER TECHNICAL DETAILS

Ipsos MORI interviewed a quota sample of **966 adults aged 15+ in GB.**

The latest interviews were carried out face to face **8th November – 15th November 2013.**

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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