Technology Tracker

TECH TRACKER

QUARTERLY RELEASE:

Q1 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 1 2016 (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

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 to 69% in Q1 2016. At the same time, connecting to the internet using a tablet also continues to grow (35%).

The top online activities remain: accessing email (80%), browsing for information on personal interest (74%), researching products and services (68%) and online shopping (63%).

Smartphones

Smartphone ownership is now more than 70%. Whilst iOS penetration has remained at similar levels y-o-y (Q1 '16 35% vs. Q1 '15 34%). Android has closed the gap and is now at 34%.

Top 3 activities on smartphones: reading or sending emails (61%), visiting social networking sites (55%) and browsing websites (44%).

Connected home

1 in 4 households have a smart TV and more than 50% use TVs that have Freeview.

36% of GB adults have at least one games console in their household which has remained consistent with previous quarter. Ownership of consoles between brands is almost level.

Tablets

Tablet ownerships sees a y-o-y decline from 53% in Q1'15 to 47% in Q1'16. Ownership of iPads and other tablets is equal and remains consistent with previous quarters.

Top 3 activities on tablet: reading or sending emails (62%), browsing websites (50%) and visiting social networking sites (49%).

Social networking

Accessing social media remains consistent with previous year (61% amongst GB adults). Using social media platforms via smartphones and PC/laptops is head to head (39% vs. 37%).

Facebook remains the most visited social networking site (59% in Q1'16). This is followed by Twitter (17%), Google+ (16%), Instagram (15%) and LinkedIn (12%).

Content consumption

Consumption of music via CDs and digital formats remains consistent at a y-o-y basis. A similar trend is observed for movies with DVD/ Blu-ray continuing to be the leading format (23% adults claimed to have bought it).

INTERNET USAGE

HOW, WHEN, WHERE

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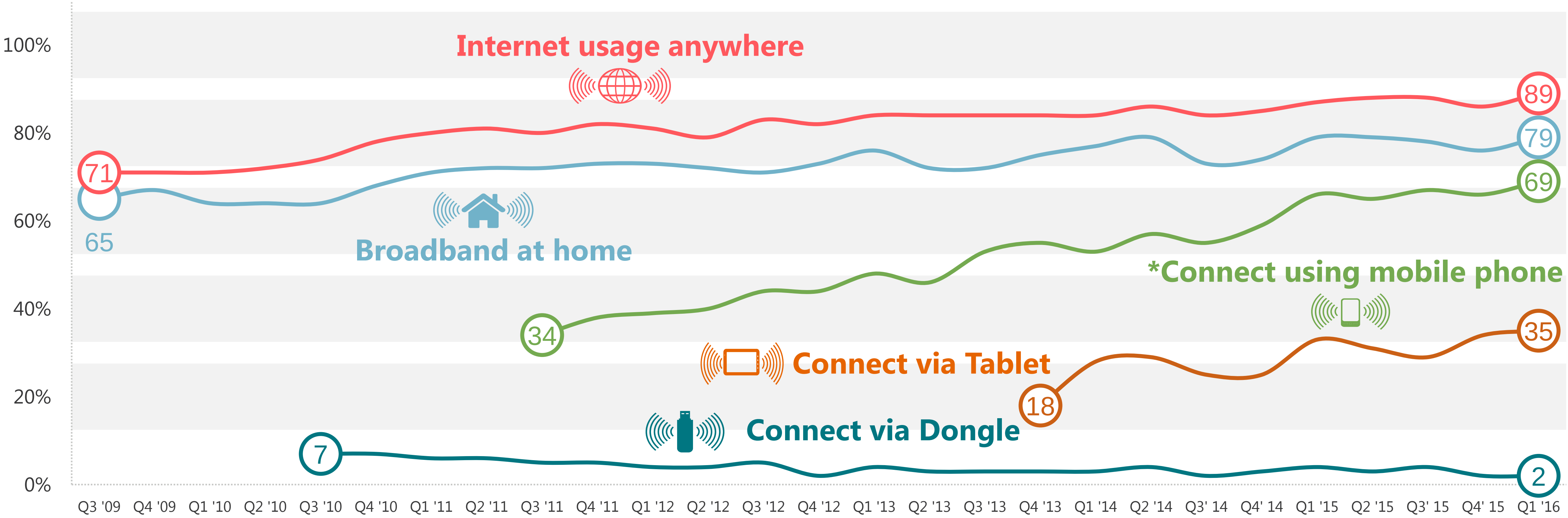
Increasing use of mobile devices to access internet

% 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

Just over half of 65+ females access the internet

% ACCESSING THE INTERNET BY GENDER AND SOCIAL GRADE

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	89%	99%	97%	95%	90%	87%	70%
Males AB	96%	100%	100%	98%	98%	99%	89%
Males C1	96%	100%	100%	99%	98%	95%	79%
Males C2	85%	100%	98%	91%	89%	77%	60%
Males DE	78%	98%	92%	90%	73%	72%	41%
Females	86%	99%	99%	97%	95%	82%	56%
Females AB	96%	100%	100%	99%	98%	97%	85%
Females C1	90%	100%	100%	100%	99%	93%	63%
Females C2	86%	98%	99%	98%	93%	78%	55%
Females DE	71%	97%	96%	90%	86%	54%	29%

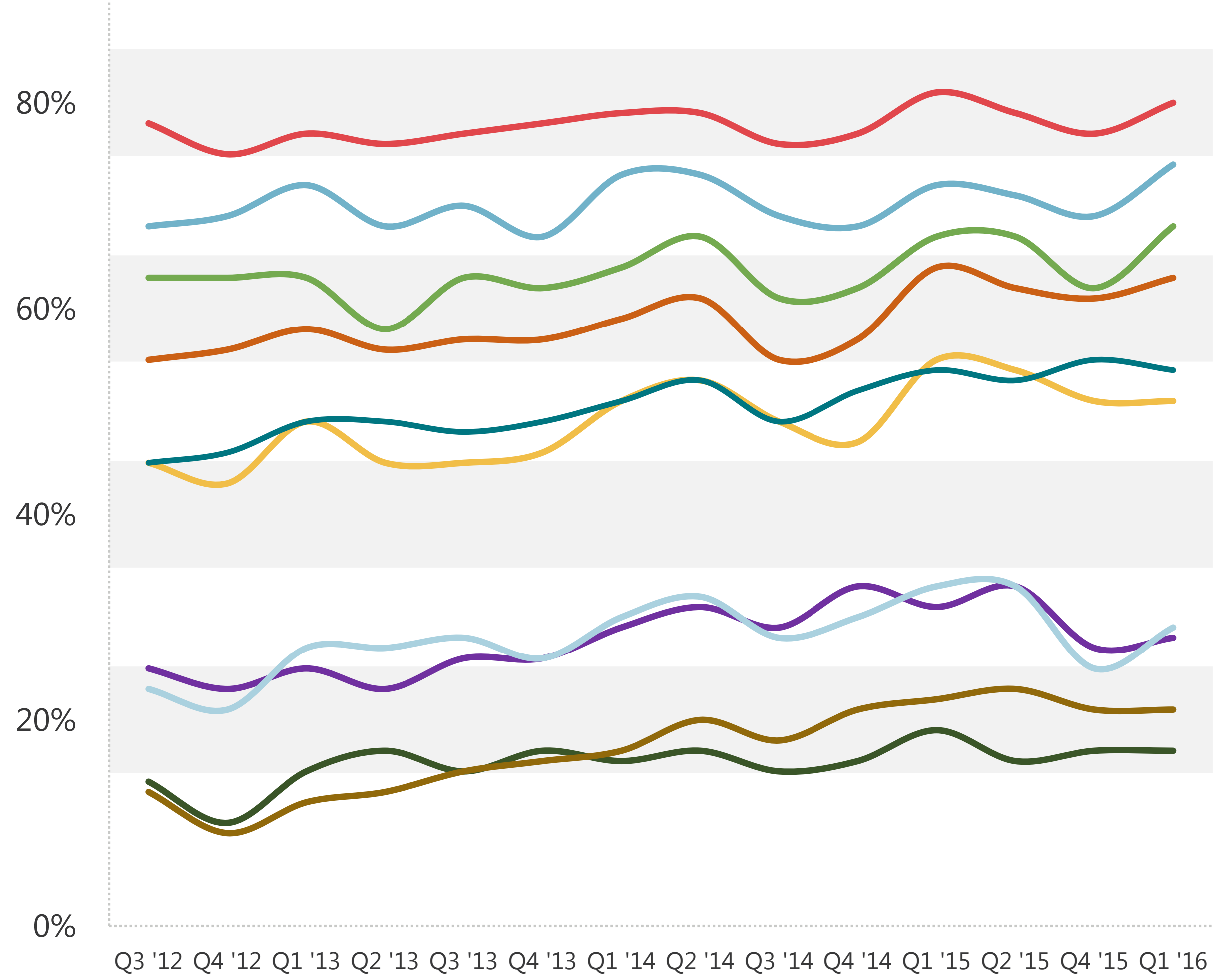
0-49% 50-79% 80-100%

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

Source: Ipsos MORI

E-Mail continues to be the most common activity

% USE OF THE INTERNET IN THE PAST 3 MONTHS



80% E-Mails
74% Visit sites for info on personal interests
68% Visit sites for info on products thinking of buying
63% Visit sites to buy products online
54% Social networking
51% Check bank account/ other financial holdings
29% Download/ stream TV
28% Download/ stream music
21% Download/ stream movies
17% 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

Tablet ownership on par with cable TV

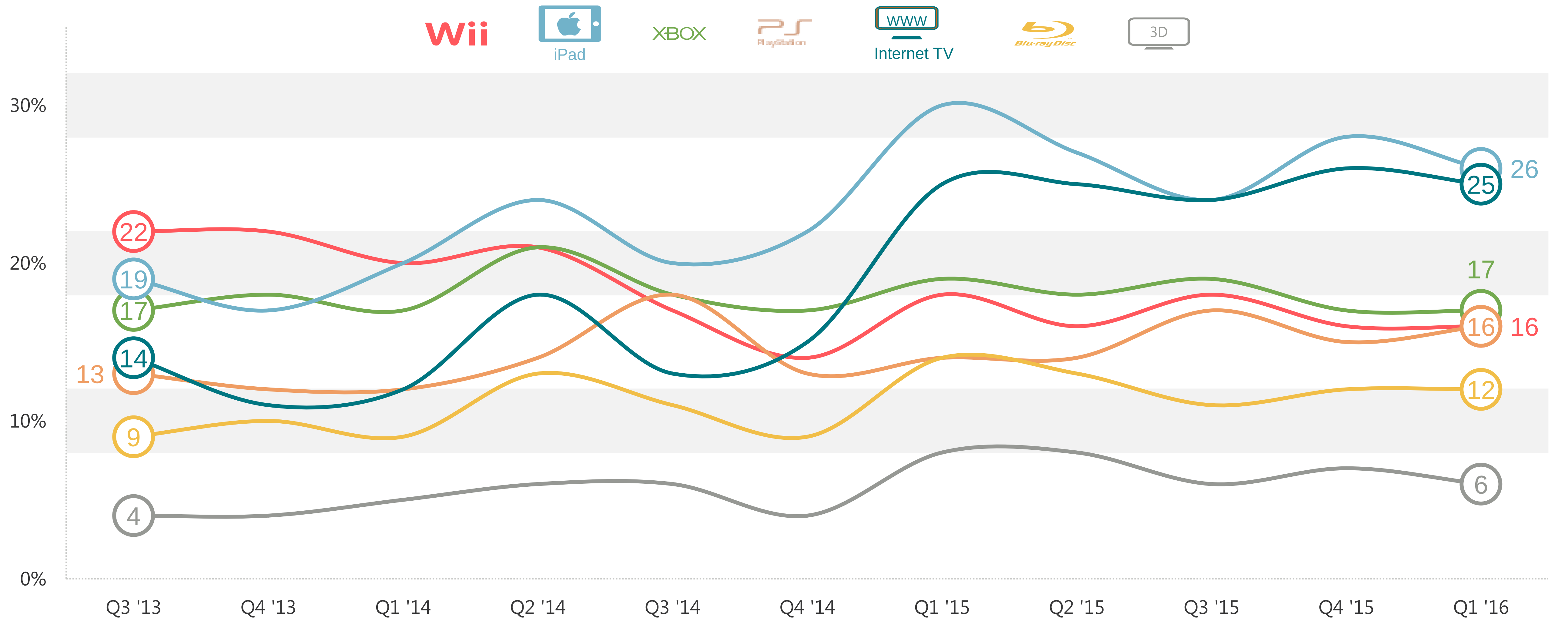
WHICH OF THE FOLLOWING DO YOU OWN/HAVE IN YOUR HOUSEHOLD?

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

Source: Ipsos MORI

Internet TV and iPad ownership are on an equal footing

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



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

Source: Ipsos MORI

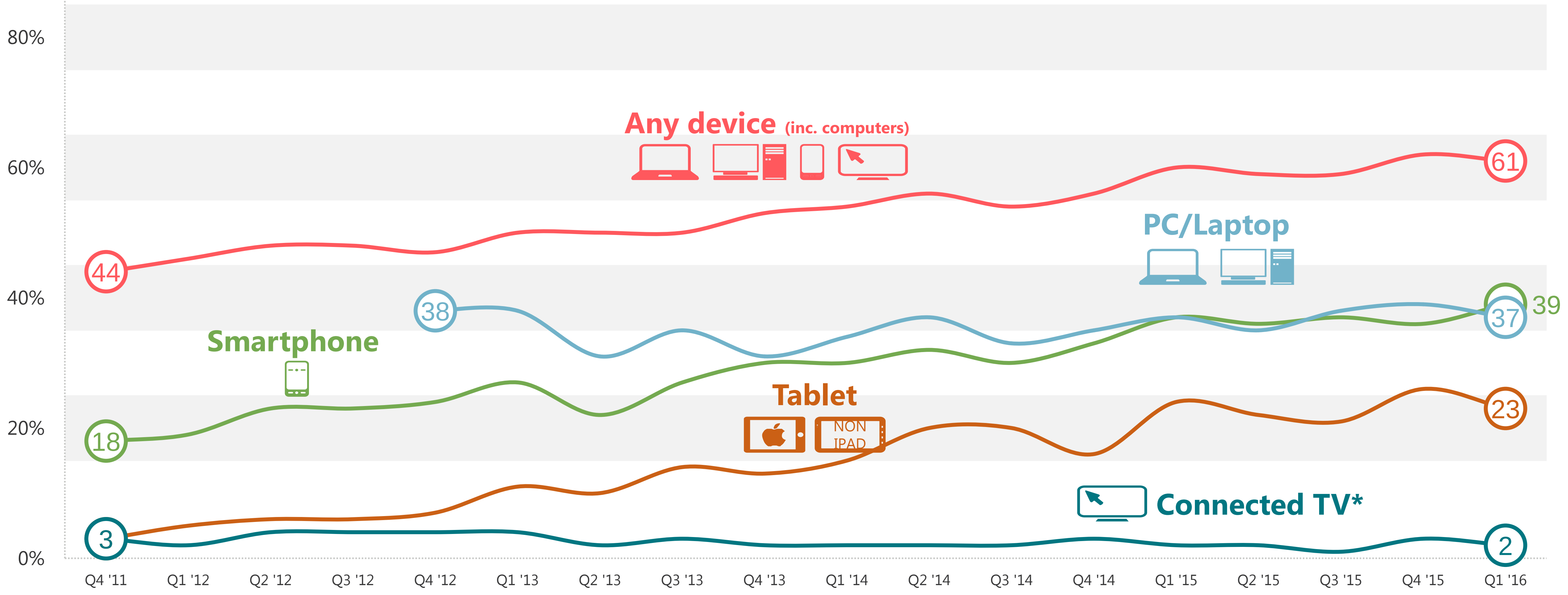
Ipsos Connect

SOCIAL NETWORKING

Smartphone fights PC for most used device

% VISITING SOCIAL NETWORKING SITES

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

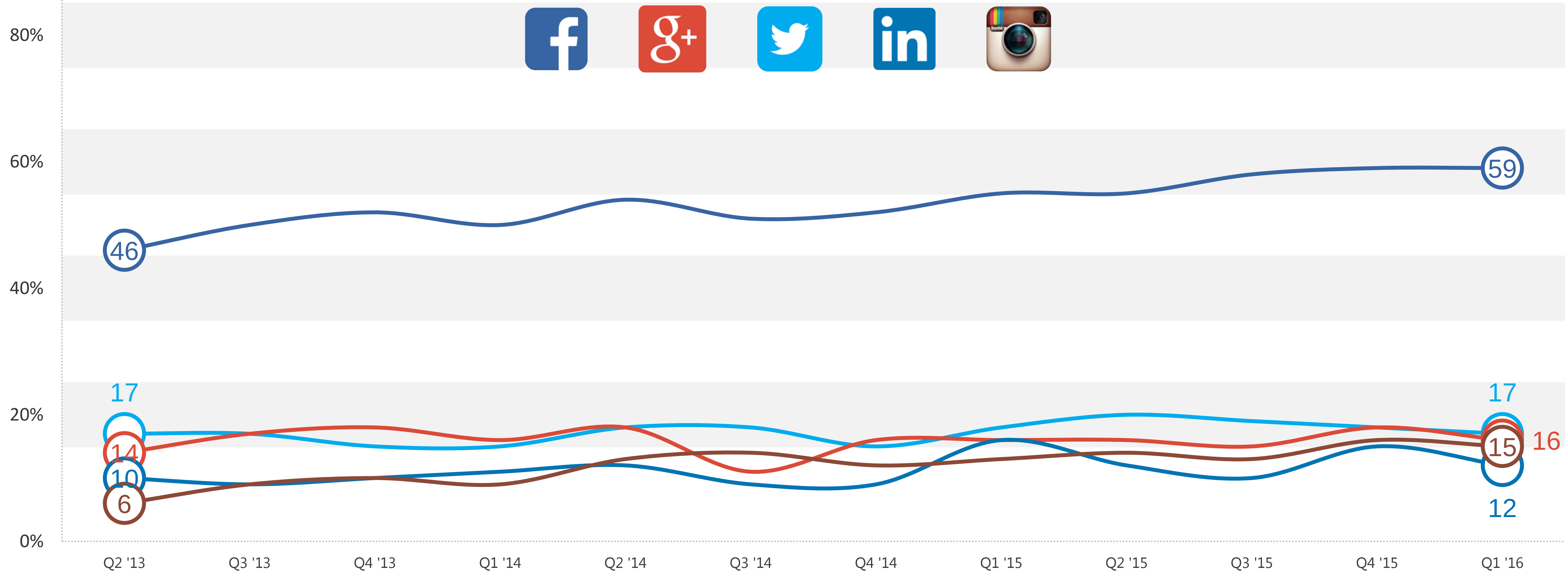


Base: circa 1,000 GB adults aged 15+ per wave

Source: Ipsos MORI

Facebook dominates amongst its peers

% VISITED IN LAST 3 MONTHS



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

Source: Ipsos MORI

Nearly half of all Facebook users are under 35

ALL ADULTS		
49%	Male	46
51%	Female	54
15%	15-24	23
17%	25-34	23
16%	35-44	18
17%	45-54	17
35%	55+	19
27%	AB	29
27%	C1	29
21%	C2	20
24%	DE	22
71%	Own Smartphone	89
47%	Own Tablet	56

The profile of Facebook users continues to be young compared to the GB adult population, with 46% of users aged 15-34.

Smartphone and Tablet ownership is also higher amongst Facebook users in comparison to the GB adult population with almost 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 (542) Q1 2016

Source: Ipsos MORI

The majority of 15-44 year olds use Facebook

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

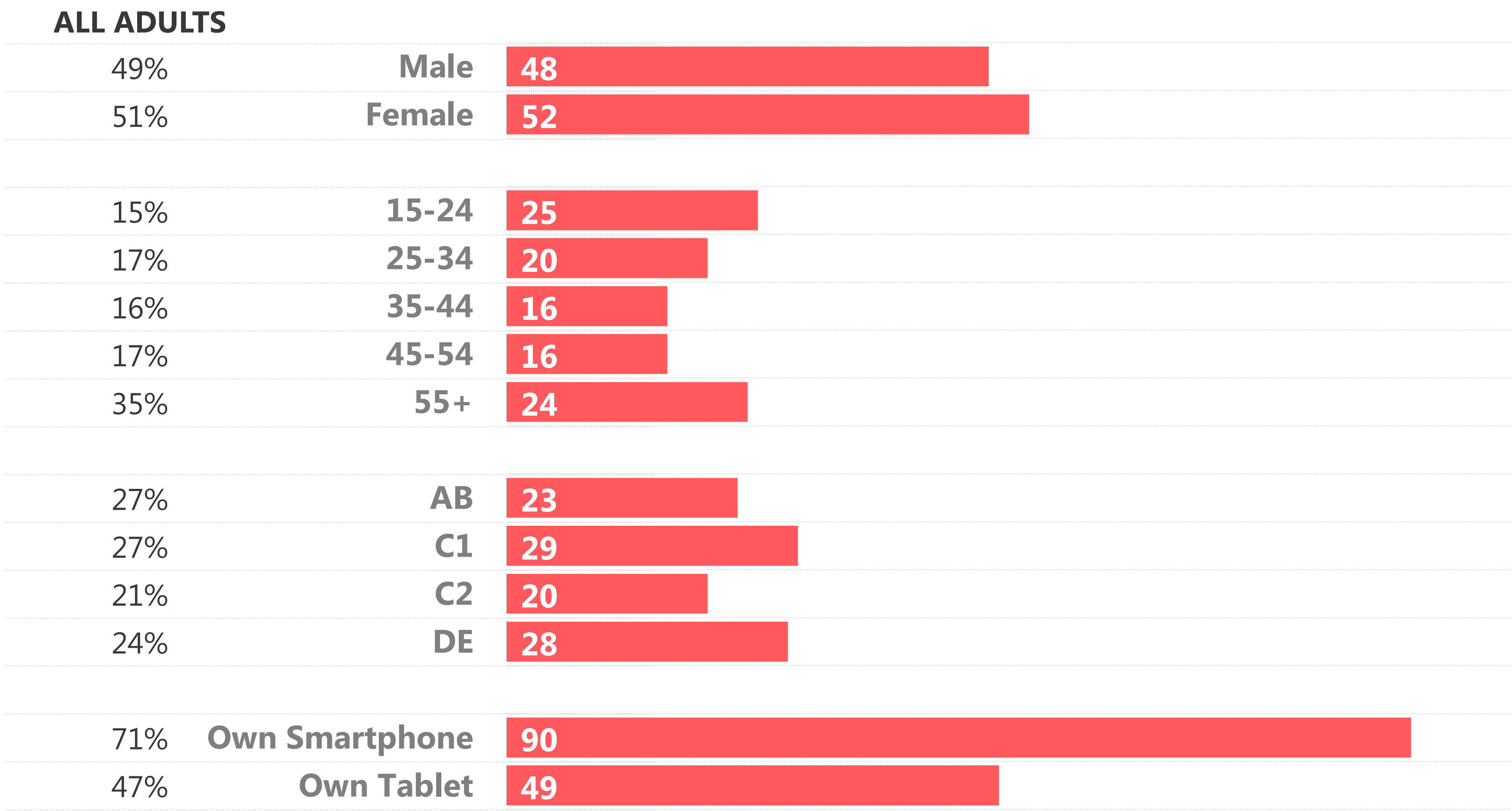
	All	15-24	25-34	35-44	45-54	55-64	65+
Males	57%	87%	77%	65%	51%	45%	22%
Males AB	59%	92%	89%	66%	57%	55%	31%
Males C1	65%	88%	83%	74%	62%	48%	26%
Males C2	52%	87%	76%	53%	45%	45%	12%
Males DE	50%	85%	63%	64%	34%	26%	16%
Females	59%	88%	79%	77%	62%	46%	20%
Females AB	62%	81%	87%	81%	59%	55%	28%
Females C1	63%	92%	79%	82%	68%	46%	23%
Females C2	61%	88%	77%	81%	56%	40%	22%
Females DE	51%	87%	71%	61%	61%	37%	12%

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

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

Source: Ipsos MORI

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



Unlike in Q4 2015, Google+ users are more or less equally split among males and females.

Both smartphone and tablet ownership continues to be relatively higher than the GB population. (90% for smartphones and 49% for tablets).

Base: circa GB adults (1,000) / All visiting / using Google+ in last 3 months (162) Q1 2016

Source: Ipsos MORI

Over 1/3 of AB males 15-24 use Google+

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

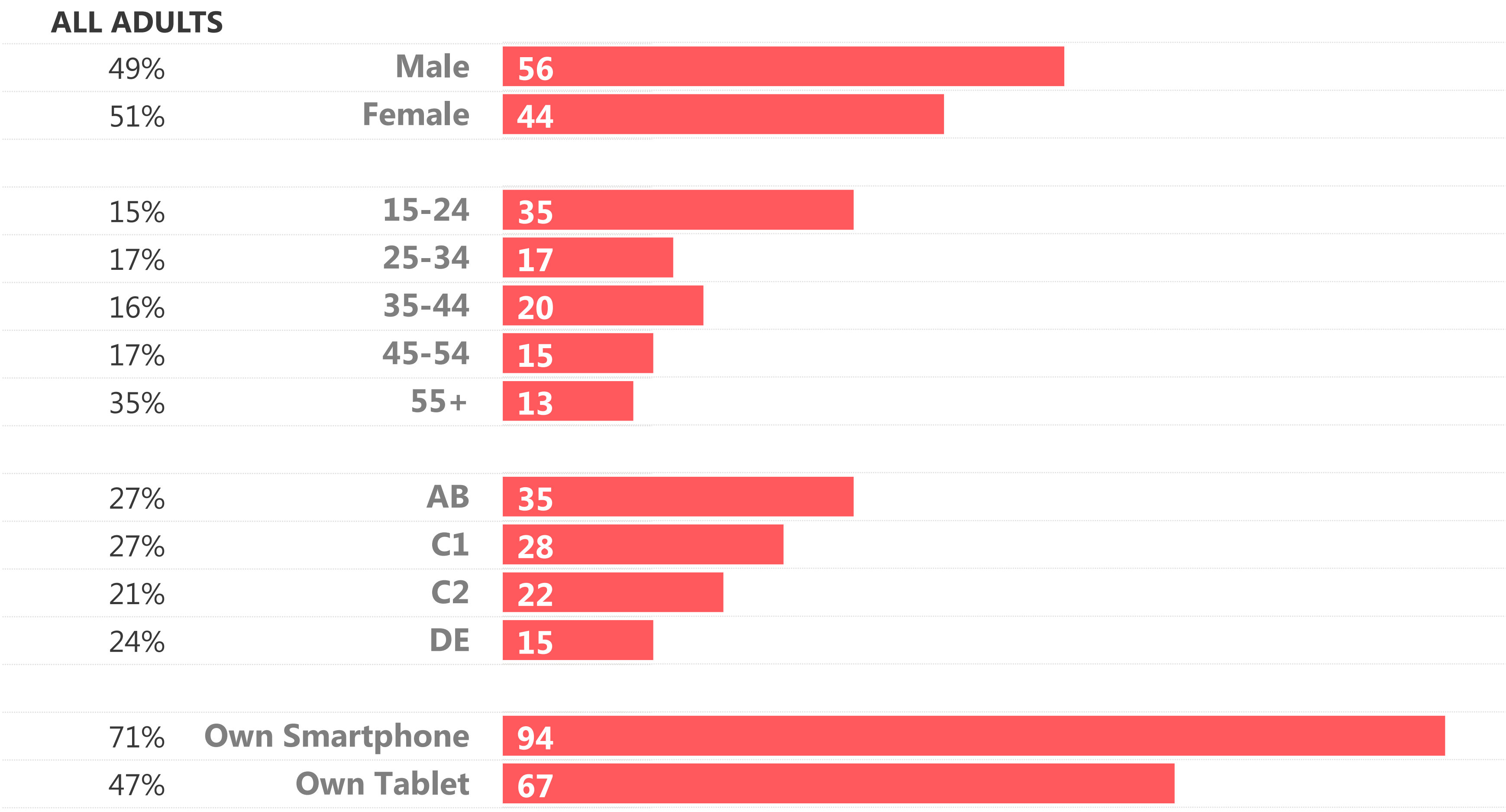
	All	15-24	25-34	35-44	45-54	55-64	65+
Males	17%	28%	22%	18%	14%	14%	6%
Males AB	18%	35%	26%	21%	14%	19%	8%
Males C1	18%	27%	21%	21%	9%	14%	13%
Males C2	14%	27%	17%	13%	13%	13%	1%
Males DE	18%	28%	25%	18%	21%	9%	2%
Females	16%	24%	21%	18%	20%	13%	5%
Females AB	16%	17%	26%	17%	16%	15%	8%
Females C1	15%	21%	17%	19%	17%	11%	5%
Females C2	18%	26%	17%	17%	26%	18%	5%
Females DE	17%	28%	26%	20%	24%	9%	3%

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

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

Source: Ipsos MORI

Twitter users are most likely to own a tablet



Twitter users continue to be predominantly of a younger age (under 45 years).

Unsurprisingly, users also have a near universal Smartphone ownership.

Base: circa GB adults (1,000) / All visiting / using Twitter in last 3 months (154) Q1 2016

Source: Ipsos MORI

Twitter most popular with 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	21%	38%	29%	31%	18%	9%	5%
Males AB	30%	50%	61%	48%	31%	12%	6%
Males C1	26%	43%	32%	36%	21%	14%	5%
Males C2	15%	32%	19%	17%	12%	5%	6%
Males DE	11%	31%	13%	10%	3%	4%	0%
Females	16%	38%	22%	18%	14%	9%	1%
Females AB	21%	57%	30%	26%	14%	17%	3%
Females C1	17%	41%	21%	19%	19%	3%	1%
Females C2	16%	39%	23%	14%	9%	12%	2%
Females DE	9%	24%	14%	7%	9%	3%	0%

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

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

Source: Ipsos MORI

LinkedIn users are predominantly AB

ALL ADULTS		
49%	Male	62
51%	Female	38
15%	15-24	14
17%	25-34	19
16%	35-44	22
17%	45-54	18
35%	55+	27
27%	AB	61
27%	C1	28
21%	C2	5
24%	DE	6
71%	Own Smartphone	93
47%	Own Tablet	62

Linkedin is a more specific social network: it is higher among 35+ years and more than 60% are social grade AB.

Base: circa GB adults (1,000) / All visiting / using Linkedin in last 3 months (104) Q1 2016

Source: Ipsos MORI

AB males are the most prolific LinkedIn users

% 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%	23%	20%	18%	5%
Males AB	31%	24%	42%	43%	41%	37%	10%
Males C1	19%	14%	21%	28%	25%	20%	6%
Males C2	4%	6%	7%	4%	4%	3%	1%
Males DE	6%	10%	10%	3%	2%	6%	2%
Females	9%	8%	13%	12%	12%	10%	3%
Females AB	19%	8%	32%	20%	19%	24%	11%
Females C1	11%	14%	14%	16%	16%	6%	1%
Females C2	4%	4%	5%	4%	7%	6%	0%
Females DE	2%	6%	2%	1%	2%	0%	0%

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

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

Source: Ipsos MORI

3 out of 4 Instagram users are under 35

ALL ADULTS		
49%	Male	45
51%	Female	55
15%	15-24	45
17%	25-34	30
16%	35-44	10
17%	45-54	6
35%	55+	7
27%	AB	27
27%	C1	25
21%	C2	24
24%	DE	25
71%	Own Smartphone	97
47%	Own Tablet	55

More than half of all Instagram users are aged 15-34.

Instagram's functionality leans itself to almost universal Smartphone ownership amongst its users.

Base: circa GB adults (1,000) / All visiting / using Linkedin in last 3 months (132) Q1 2016

Source: Ipsos MORI

Instagram is strongest with 15-24 year olds

% 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%	34%	25%	14%	5%	4%	1%
Males AB	17%	37%	51%	24%	9%	5%	2%
Males C1	16%	40%	23%	14%	7%	4%	2%
Males C2	9%	31%	16%	2%	2%	2%	0%
Males DE	11%	29%	15%	9%	1%	3%	0%
Females	16%	49%	27%	12%	7%	4%	1%
Females AB	19%	70%	40%	16%	10%	6%	4%
Females C1	16%	49%	24%	16%	9%	5%	1%
Females C2	15%	43%	22%	7%	5%	5%	1%
Females DE	12%	42%	23%	4%	2%	1%	0%

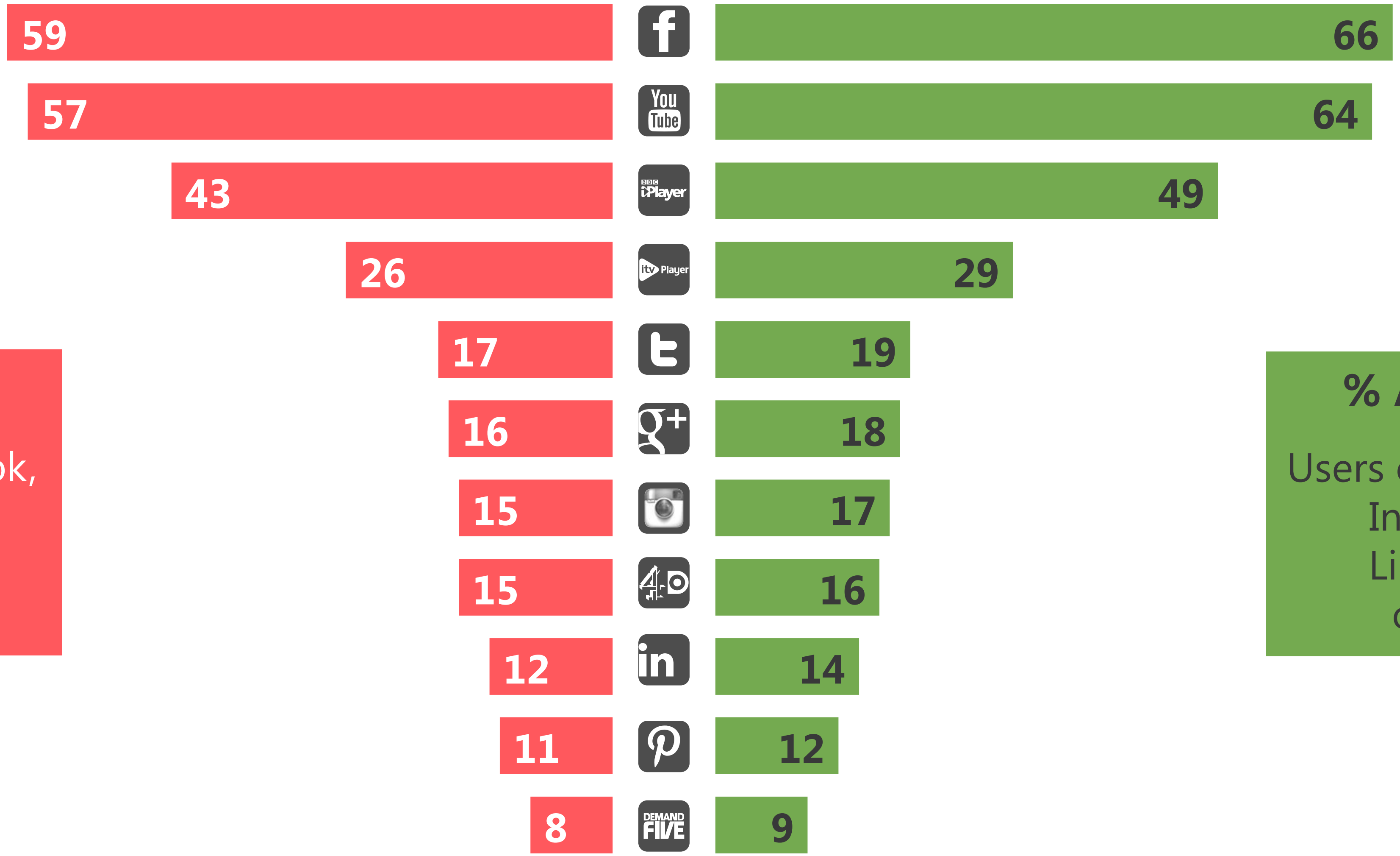
0-24% 25-49% 50-100%

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

Source: Ipsos MORI

Facebook is the most visited site

% 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 - 70%

Base: circa GB adults 1,000 adults aged 15+: Q1 2016

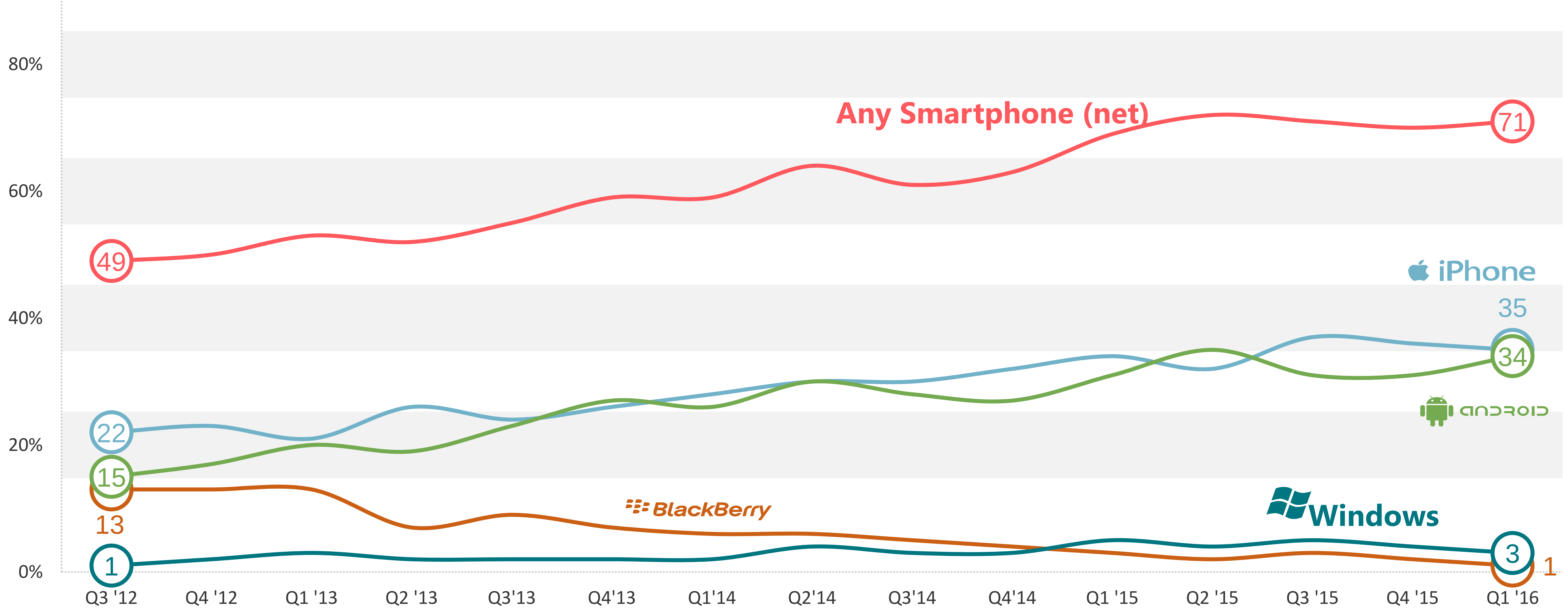
Base: 847 GB online adults aged 15+: Q1 2016

Source: Ipsos MORI

SMARTPHONE OWNERSHIP

Android has closed the gap on iPhone

% OWN by MANUFACTURER



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

Source: Ipsos MORI

Adoption of smartphones still low among 65+

% OWN A SMARTPHONE BY GENDER AND SOCIAL GRADE

	All%	15-24%	25-34%	35-44%	45-54%	55-64%	65+%
Males%	73%	94%	92%	88%	74%	65%	31%
Males AB%	78%	100%	98%	96%	81%	79%	44%
Males C1%	80%	93%	94%	94%	82%	73%	33%
Males C2%	70%	95%	93%	80%	75%	58%	24%
Males DE%	62%	91%	82%	76%	53%	44%	14%
Females%	69%	93%	94%	89%	78%	56%	23%
Females AB%	75%	95%	95%	92%	81%	67%	35%
Females C1%	73%	96%	93%	91%	88%	61%	27%
Females C2%	71%	89%	96%	91%	75%	55%	23%
Females DE%	57%	93%	93%	79%	61%	36%	12%

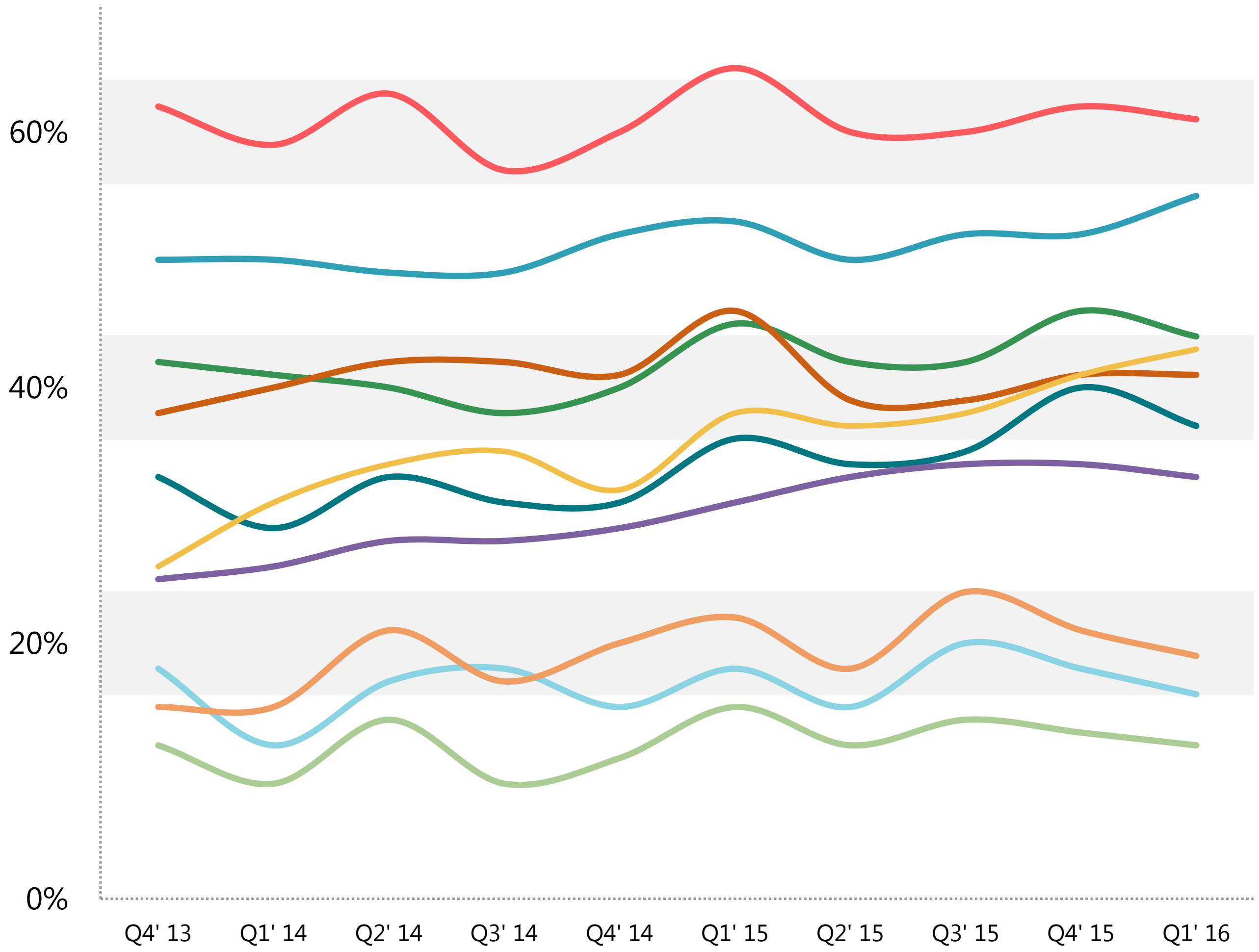
0-24% 25-49% 50-100%

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

Source: Ipsos MORI

Online banking is becoming increasingly popular

USE OF SMARTPHONE IN THE PAST 3 MONTHS



61% Read or send emails

55% Visit social networking sites

44% Browse websites for personal interests

43% Online banking

41% Download apps for free

37% Watch video clips on sites such as Youtube

33% Online shopping

19% Download/ stream music over the internet

16% Use instant messaging services such as BBM

12% Watch catch-up TV

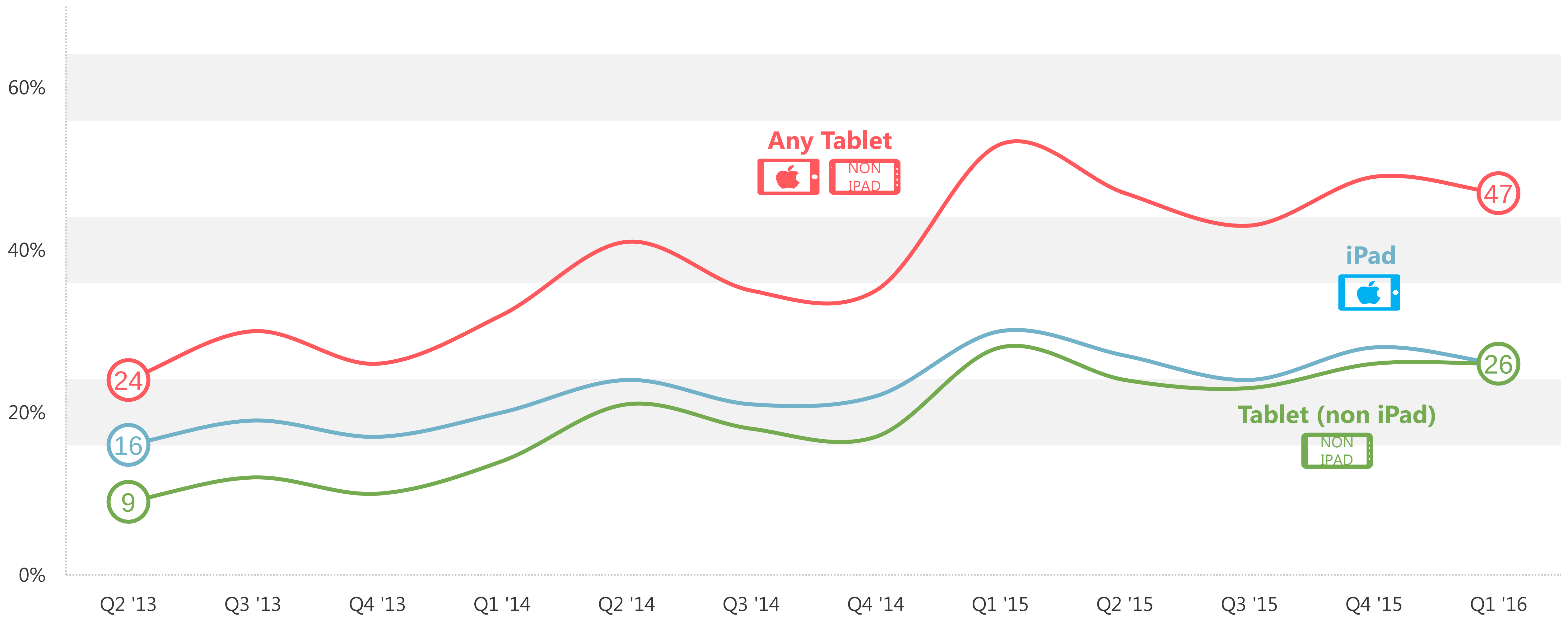
Base: circa 500-750 smartphone owners per wave

Source: Ipsos MORI

TABLET OWNERSHIP

iPad is no longer the dominate brand

% OWN A TABLET IN THE HOUSEHOLD



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

Source: Ipsos MORI

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Tablets are most popular with the AB population

% OWN A TABLET BY GENDER AND SOCIAL GRADE ACROSS

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	49%	53%	54%	55%	49%	52%	33%
Males AB	64%	85%	81%	61%	69%	68%	44%
Males C1	52%	53%	51%	62%	49%	58%	38%
Males C2	43%	43%	53%	55%	41%	36%	30%
Males DE	34%	42%	39%	37%	32%	38%	14%
Females	44%	43%	48%	59%	51%	45%	27%
Females AB	58%	54%	59%	65%	64%	59%	46%
Females C1	47%	47%	48%	63%	51%	54%	31%
Females C2	39%	34%	49%	54%	43%	37%	20%
Females DE	32%	41%	38%	48%	41%	26%	14%

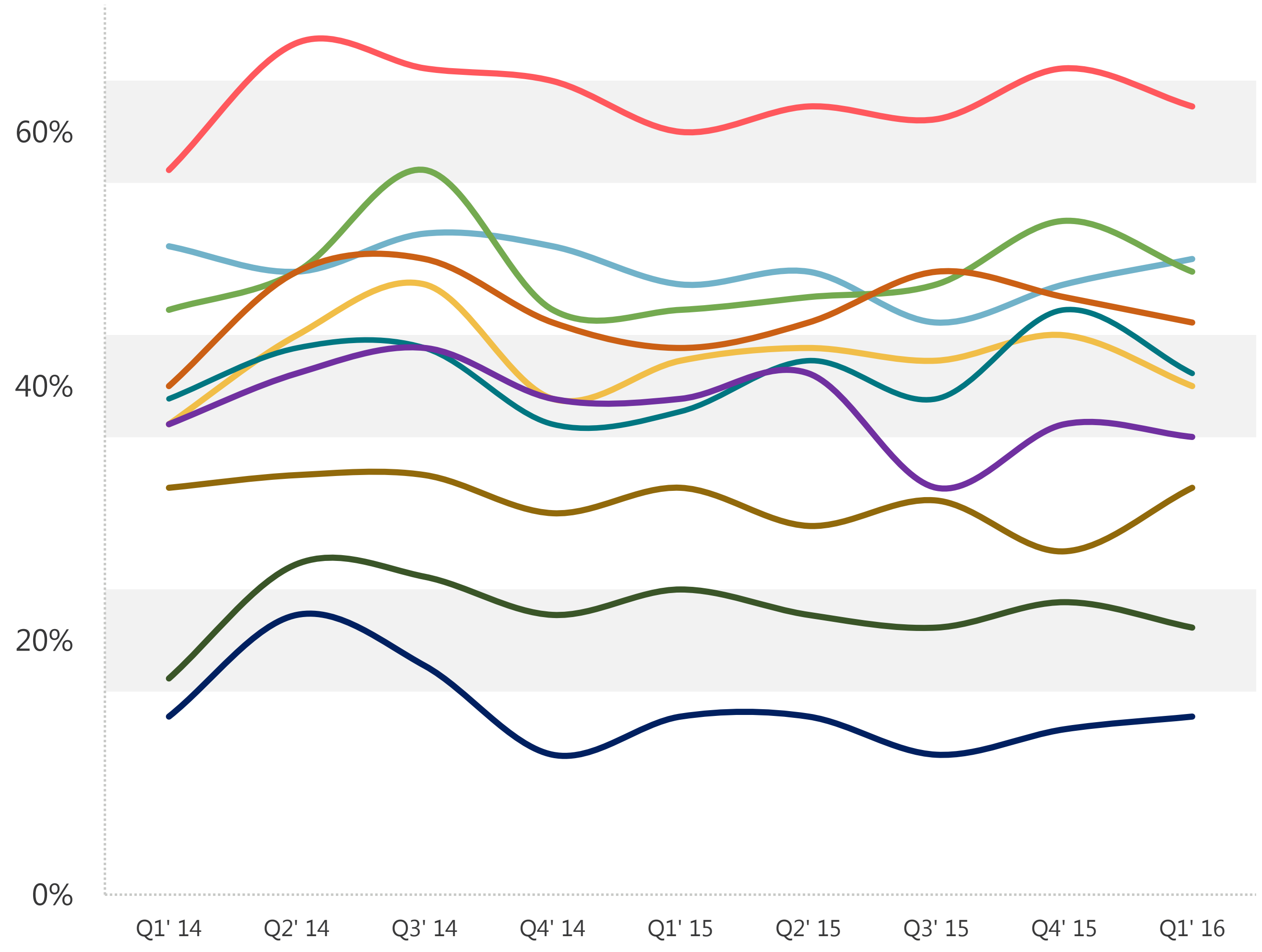
0-24%   25-49%   50-100%

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

Source: Ipsos MORI

Reading and sending e-mails remains top activity

USE OF TABLET IN THE PAST 3 MONTHS



62% Read or send emails

50% Browse websites for personal interests

49% Visit social networking sites

45% Online shopping

41% Online banking

40% Watch video clips on sites such as Youtube

36% Download apps for free

32% Watch catch-up TV

21% Download/ stream music over the internet

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

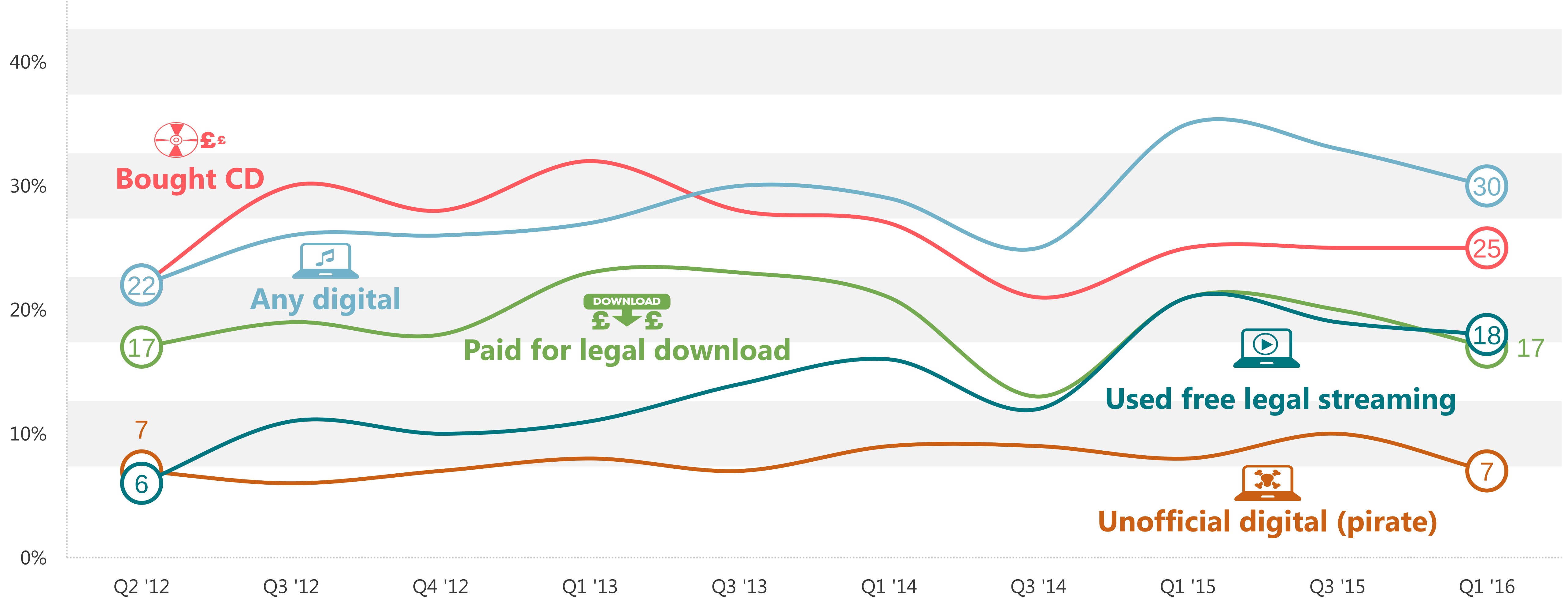
Base: circa 300-500 adults 15+ who own tablets

Source: Ipsos MORI

Content CONSUMPTION
Music / GAMES / TV / MOVIES

Digital still beats bought CDs

MUSIC CONSUMPTION

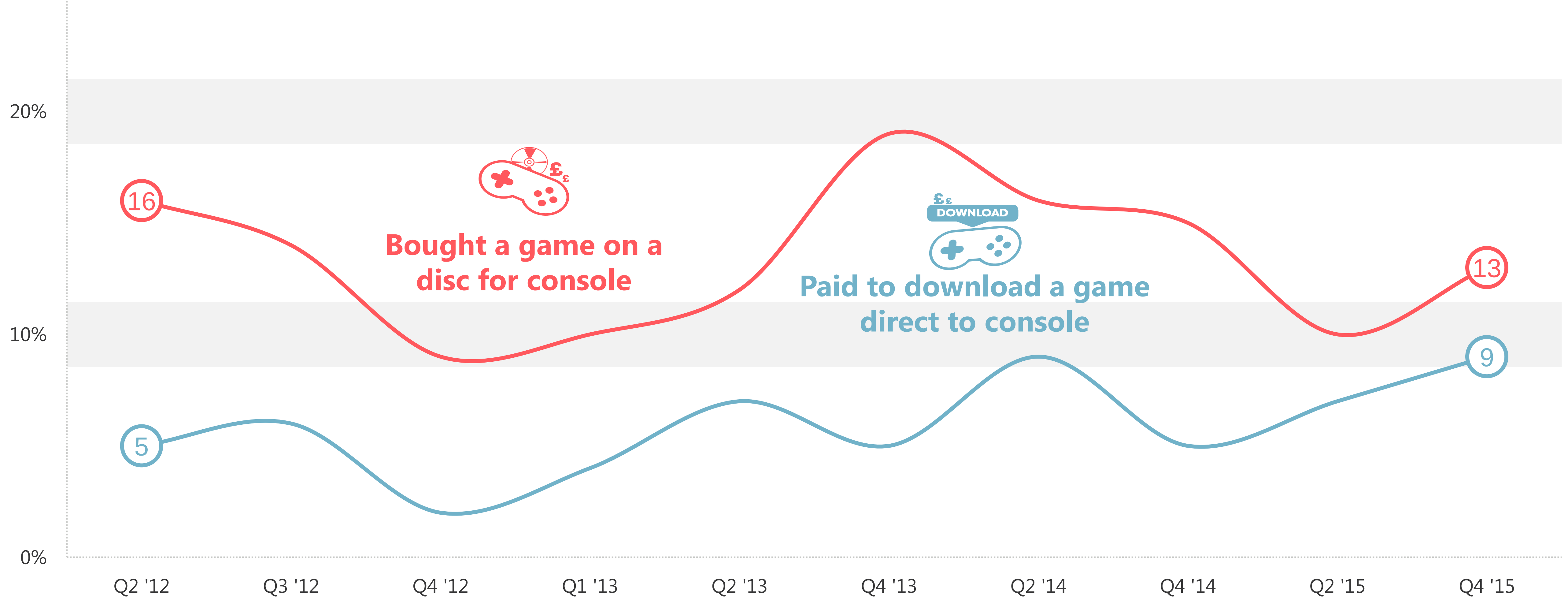


Base: circa 1,000 GB adults aged 15+ per wave / Music consumption is tracked every 6 months

Source: Ipsos MORI

Gap between bought discs and downloads closes

GAMES CONSUMPTION



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

Source: Ipsos MORI

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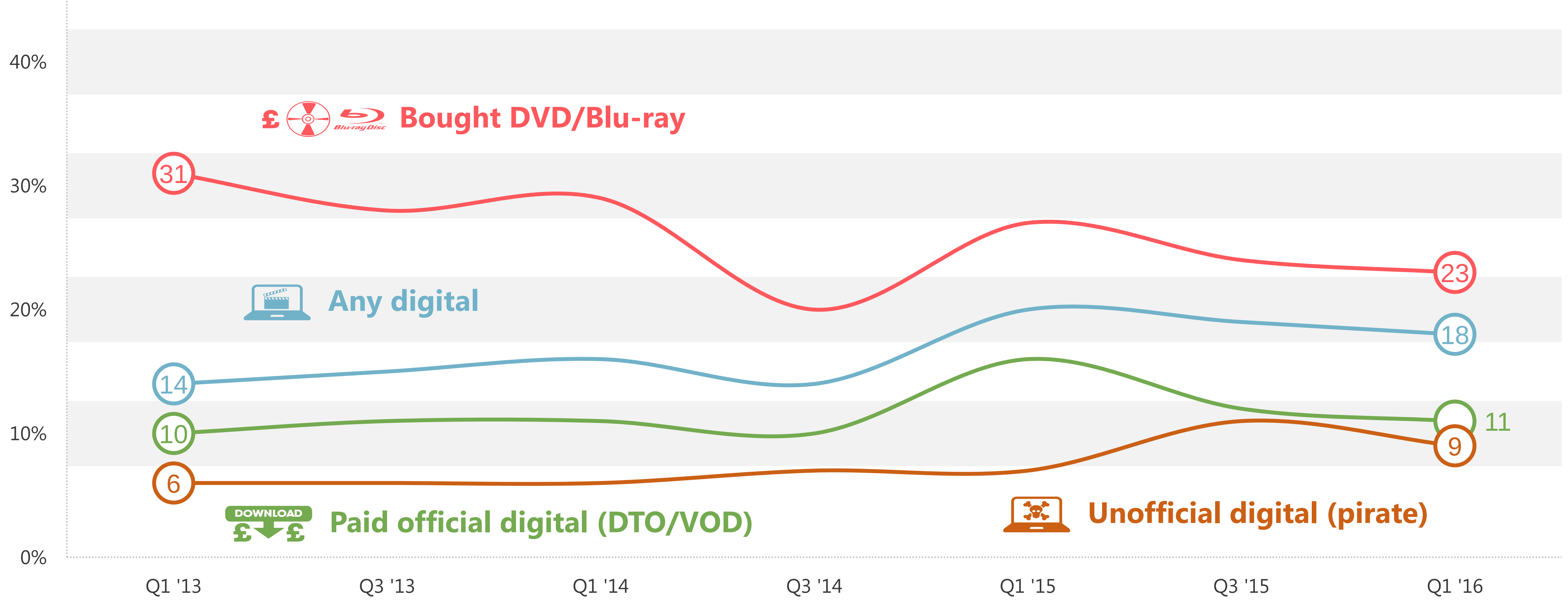
Digital closes the gap on physical

MOVIE CONSUMPTION

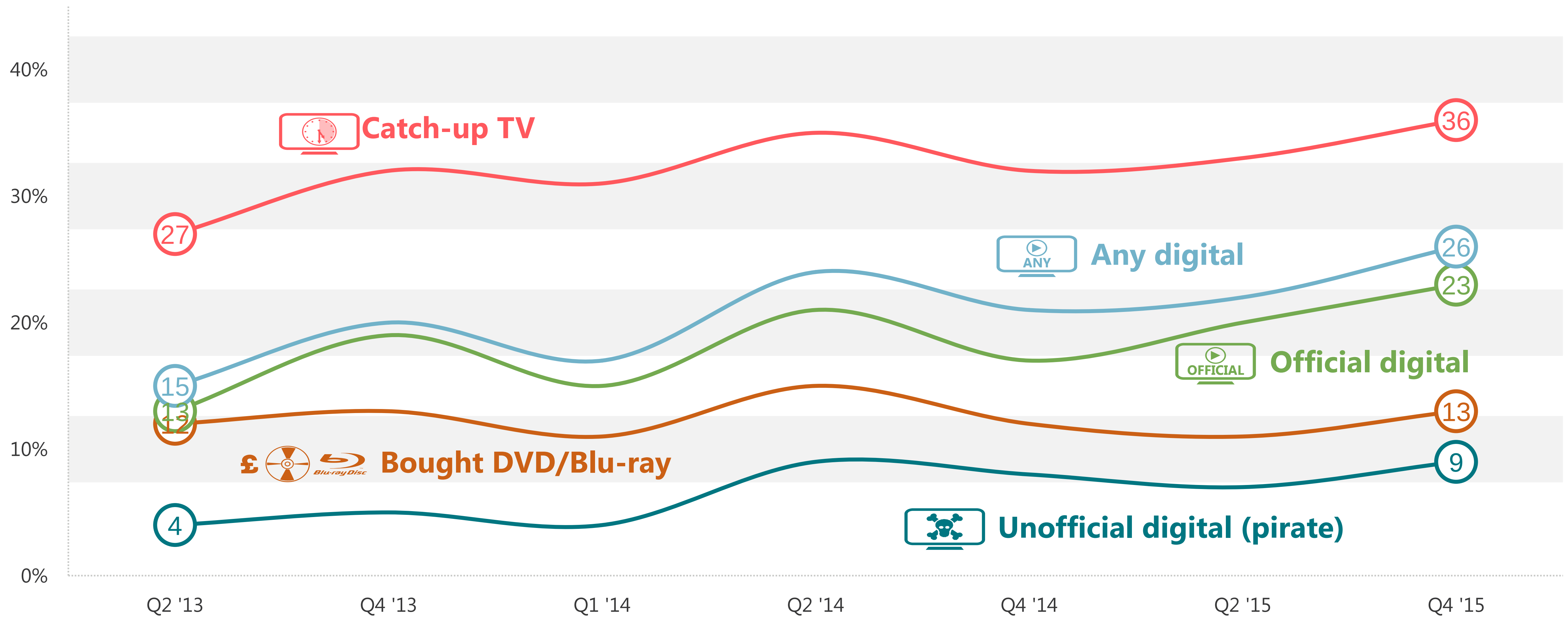


Base: circa 1,000 GB adults aged 15+ per wave / Movie consumption is tracked every 6 months

Source: Ipsos MORI

TV consumption grows across catch up and digital

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 **984 adults aged 15+ in GB**.
- The latest interviews were carried out face to face **30^{th} January – 7^{th} February 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.

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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.

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.

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