TECH TRACKER

QUARTERLY RELEASE: Q2 2015

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 2 2015 (Field in April)

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
- Smartwatches and wearables

HEADLINES

Internet usage

The proportion of adults accessing the internet is at 88%, with around two-thirds (65%) accessing via mobile.

The top online activities remain: accessing email (79%), browsing for information on hobbies (71%), researching products and services (67%) and online shopping (62%).

Connected home

Nearly three-quarters (72%) of households own a laptop. Smart TV ownership remains steady at 25% - up from 18% this time last year.

33% of GB adults have at least one games console in their household. Ownership of consoles between brands is almost equal with Wii/WiiU at 16%, PS3/4 at 14% and Xbox 360/One at 18%.

Social networking

59% of GB adults access social networking sites. Access via a PC/Laptop or Smartphone remains equal (36% vs. 35% respectively), while 22% access via a tablet. More than half of all adults (55%) have used Facebook in the past 3 months. 20% have used Twitter, 16% used Google+ and 14% used Instagram.

Smartphones

Smartphone ownership is at 72% and continues to rise steadily. iOS penetration is at 32% and for the first time since the end of 2013, has been surpassed by Android (35%) as the leading operating system.

Tablets

Despite a drop this quarter, household tablet ownership continues to fluctuate around the 50% penetration mark. Both iPad and non-iPad tablets record a similar level ownership (27% vs. 24%). E-mailing and browsing websites of personal interest are the top activities conducted on this device.

Content consumption

33% of GB adults have consumed a TV series via catch-up, with 22% claiming to consume in a digital format (official or unofficial).

Game console owners still prefer purchasing games in disc format (10%) over downloading them directly onto their console (7%). However, the gap between the two formats continues to close.

Smartwatches and Wearables

Nearly 2 in 3 (62%) of GB adults are now aware of smartwatches, up from 44% at the end of 2014. Awareness of wearables is also rising with 37% now aware of fitness bands, monitors, health trackers or wearable sensors.

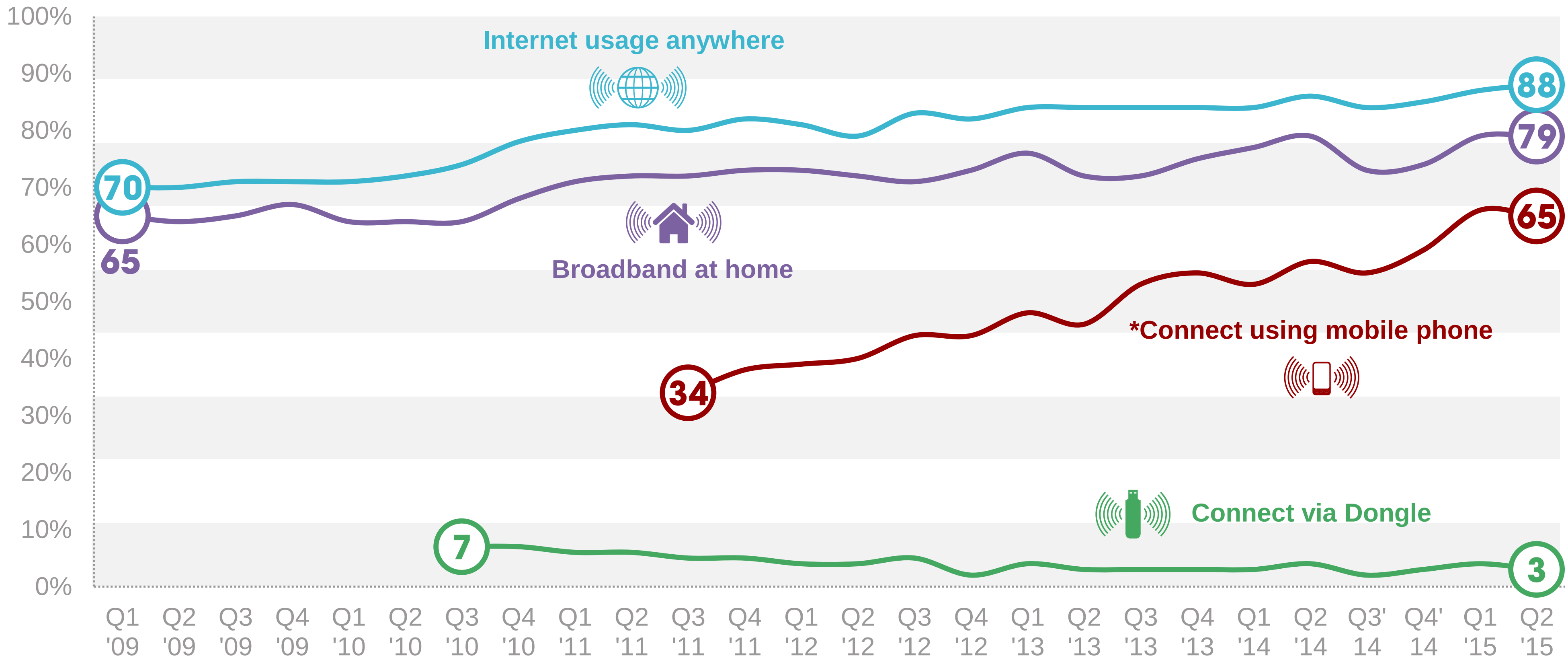
Smartwatch ownership has also risen from Q4 2014, although still remains relatively low with 3% penetration. Interest in the product itself remains niche, with 6% of non-owners considering themselves very / somewhat likely to purchase a smartwatch in the next 12 months.

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 2014/2015

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	87%	98%	97%	94%	91%	86%	62%
Males AB	94%	100%	96%	100%	100%	98%	81%
Males C1	94%	98%	98%	100%	96%	94%	72%
Males C2	83%	100%	99%	88%	88%	78%	48%
Males DE	77%	96%	96%	84%	74%	60%	37%
Females	84%	98%	97%	96%	95%	82%	52%
Females AB	95%	100%	99%	100%	100%	96%	84%
Females C1	88%	99%	100%	99%	97%	93%	56%
Females C2	84%	98%	98%	96%	94%	78%	42%
Females DE	70%	97%	92%	86%	81%	51%	27%

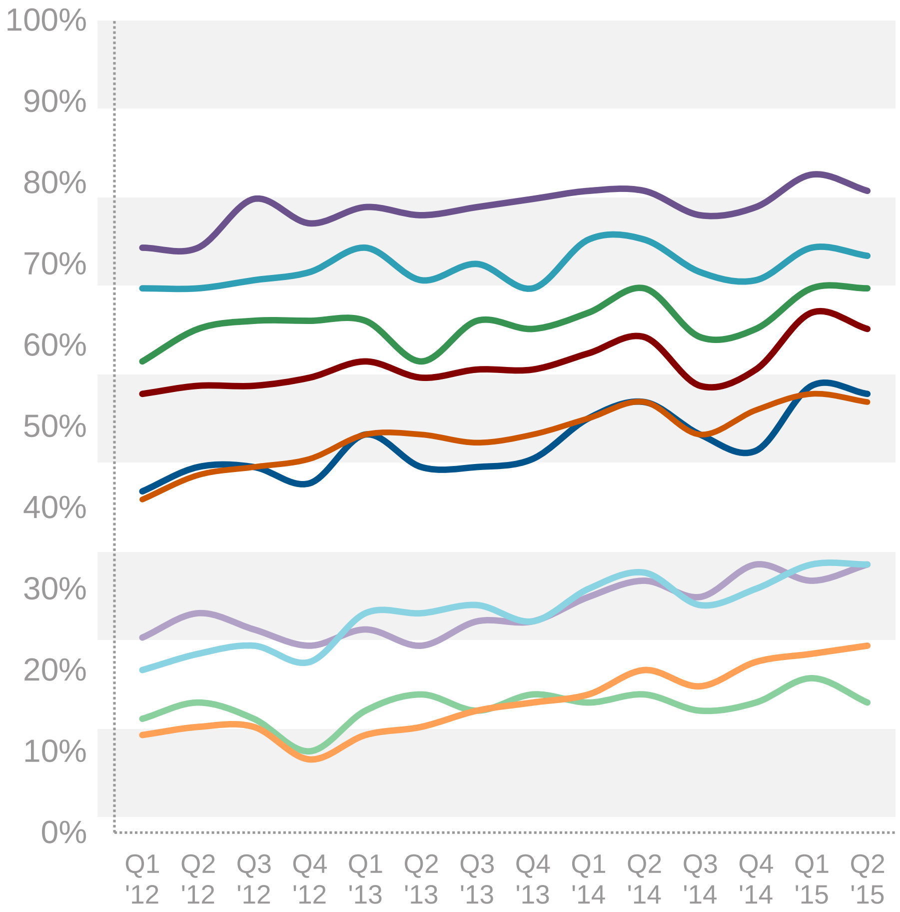
0-49% 50-79% 80-100%

Base: circa 1,000 GB adults aged 15+: Q3/ Q4 2014 Q1/Q2 2015

Source: Ipsos MORI

CHANGING WAYS THE INTERNET IS USED

% USE OF THE INTERNET IN THE PAST 3 MONTHS



79% Emails

71% Visit sites for info personal interests

67% Visit sites for info on products thinking of buying

62% Visit sites to buy products online

54% Check bank account/ other financial holdings

53% Social networking

33% Download/ stream music

33% Download/ stream TV

23% Download/ stream movies

16% Play video games online

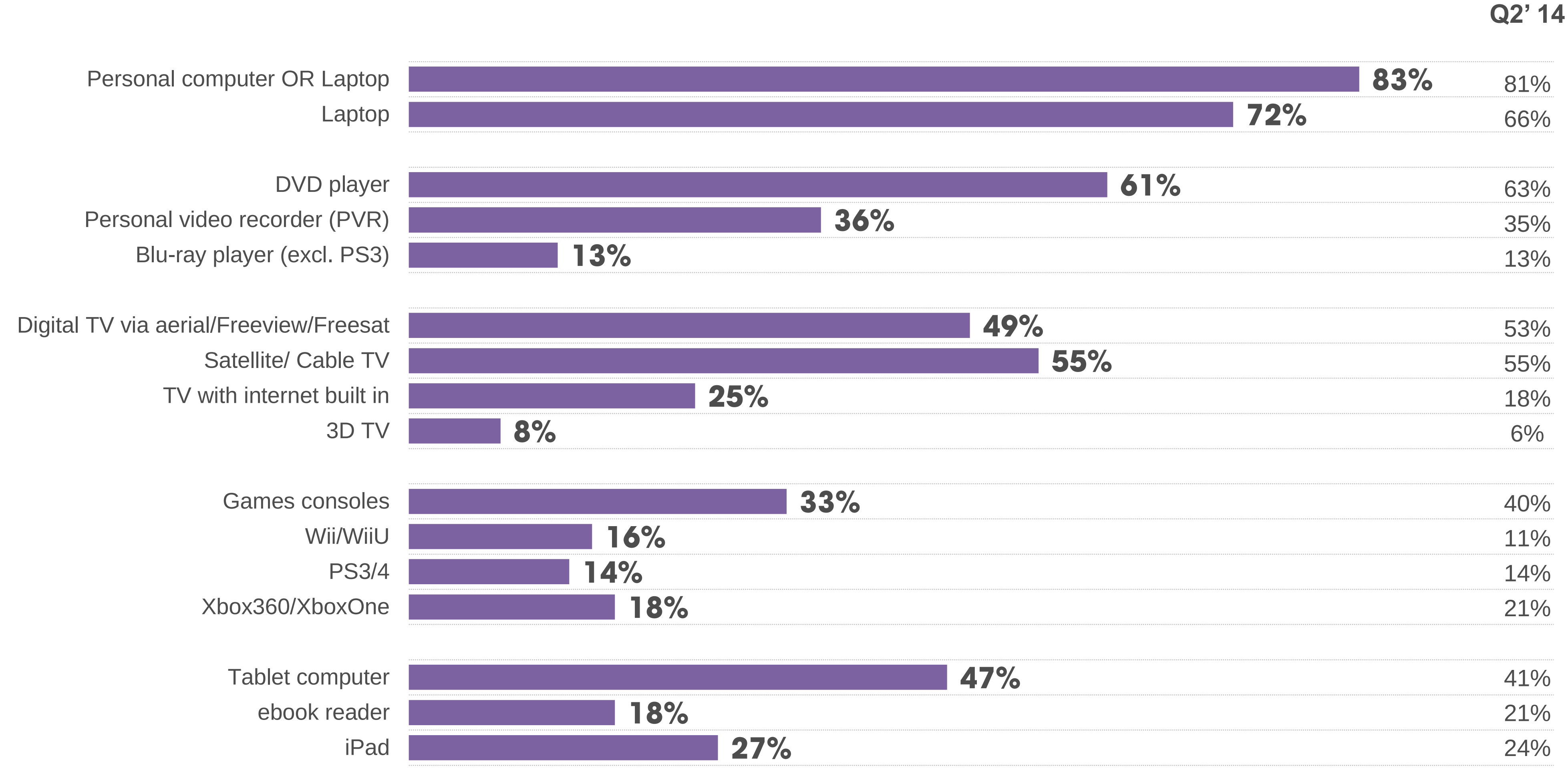
Base: circa 2,000 interviews per wave until Quarter 1 2010, circa 1,000 GB adults aged 15+ per wave thereafter

Source: Ipsos MORI

CONNECTED HOME

EQUIPMENT IN THE HOME

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

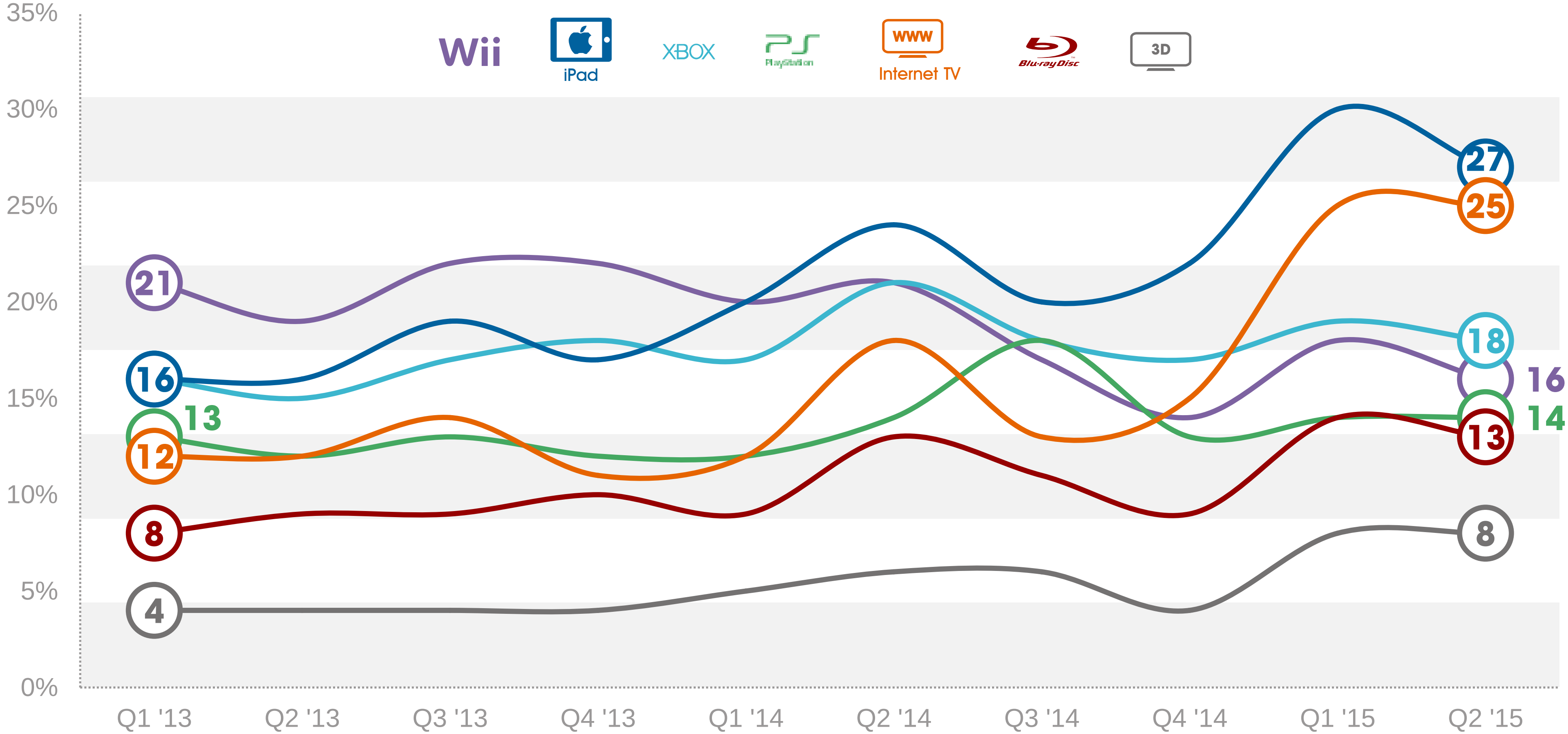


Base: circa 1,000 GB adults aged 15+: Quarter 2 2015

Source: Ipsos MORI

TRENDS IN EQUIPMENT OWNERSHIP IN THE HOME

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



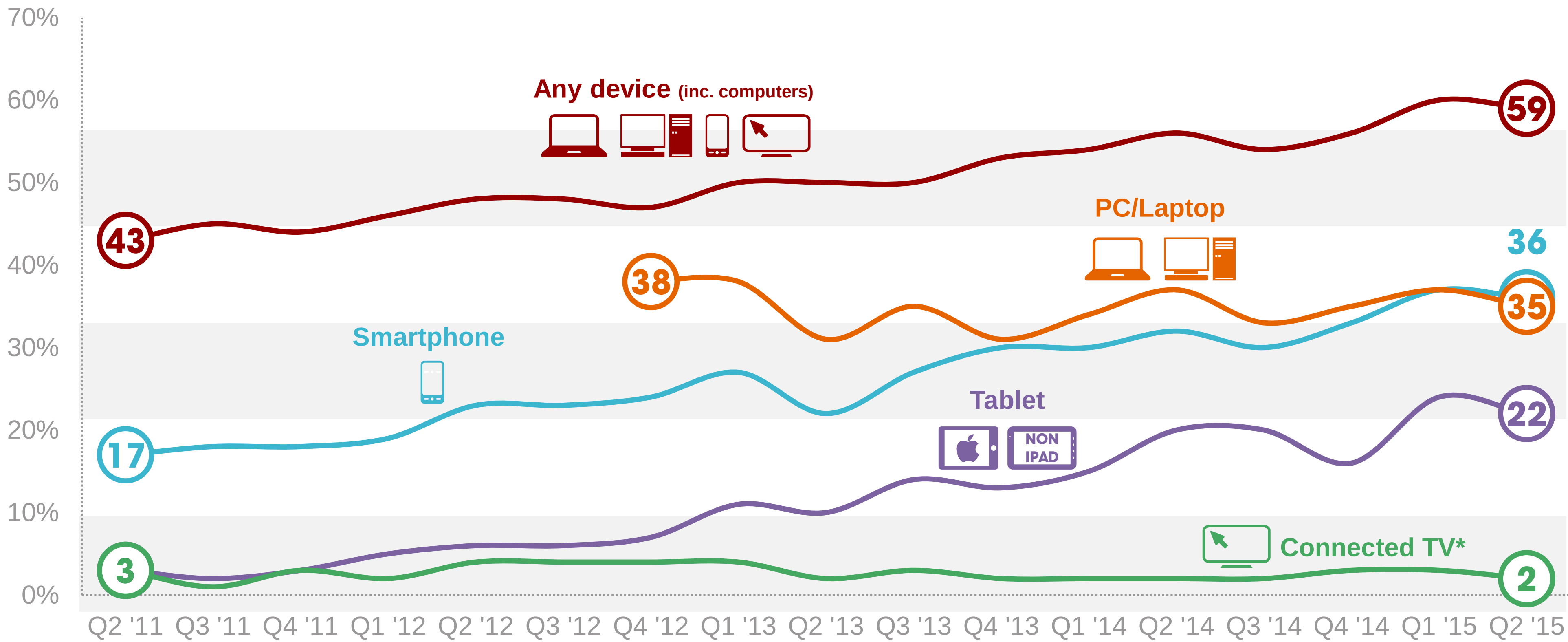
Base: circa 1,000 GB adults aged 15+ per wave

Source: Ipsos MORI

SOCIAL NETWORKING

TRENDS IN VISITING SOCIAL NETWORKING SITES

% VISITING SOCIAL NETWORKING SITES



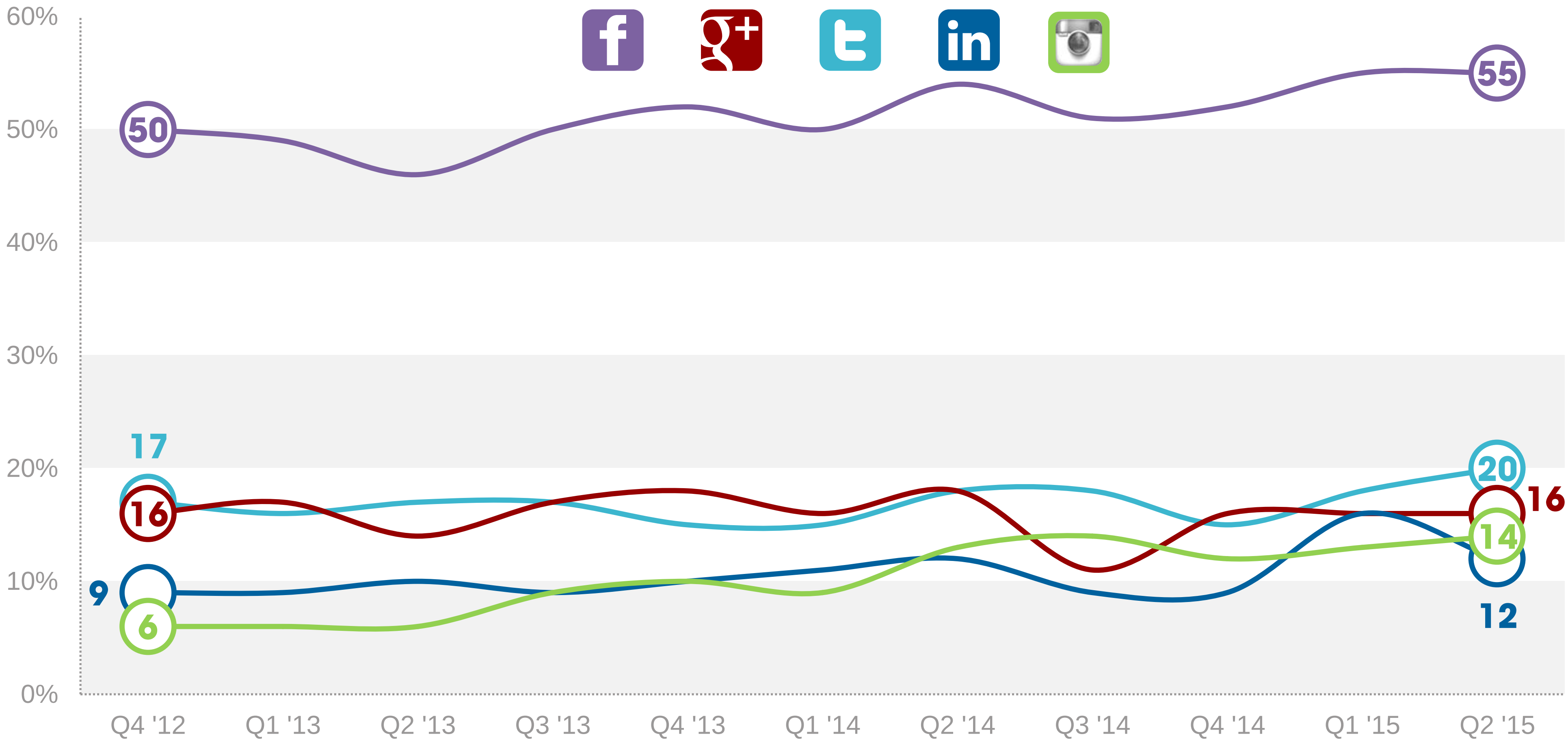
Connected TV* - Games console, web enabled TVs and PCs connected to a TV

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	24
17%	25-34	21
16%	35-44	20
17%	45-54	18
35%	55+	17
27%	AB	26
27%	C1	31
21%	C2	19
25%	DE	23
72%	Own Smartphone	90
47%	Own Tablet	59

The profile of Facebook users is younger than the GB adult population, with 45% of users aged 15-34.

Smartphone and tablet ownership is higher amongst Facebook users than the GB adult population.

Base: circa GB adults (1,000) / All visiting / using Facebook in last 3 months (538) Q2 2015

Source: Ipsos MORI

SOCIAL NETWORKING – FACEBOOK

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

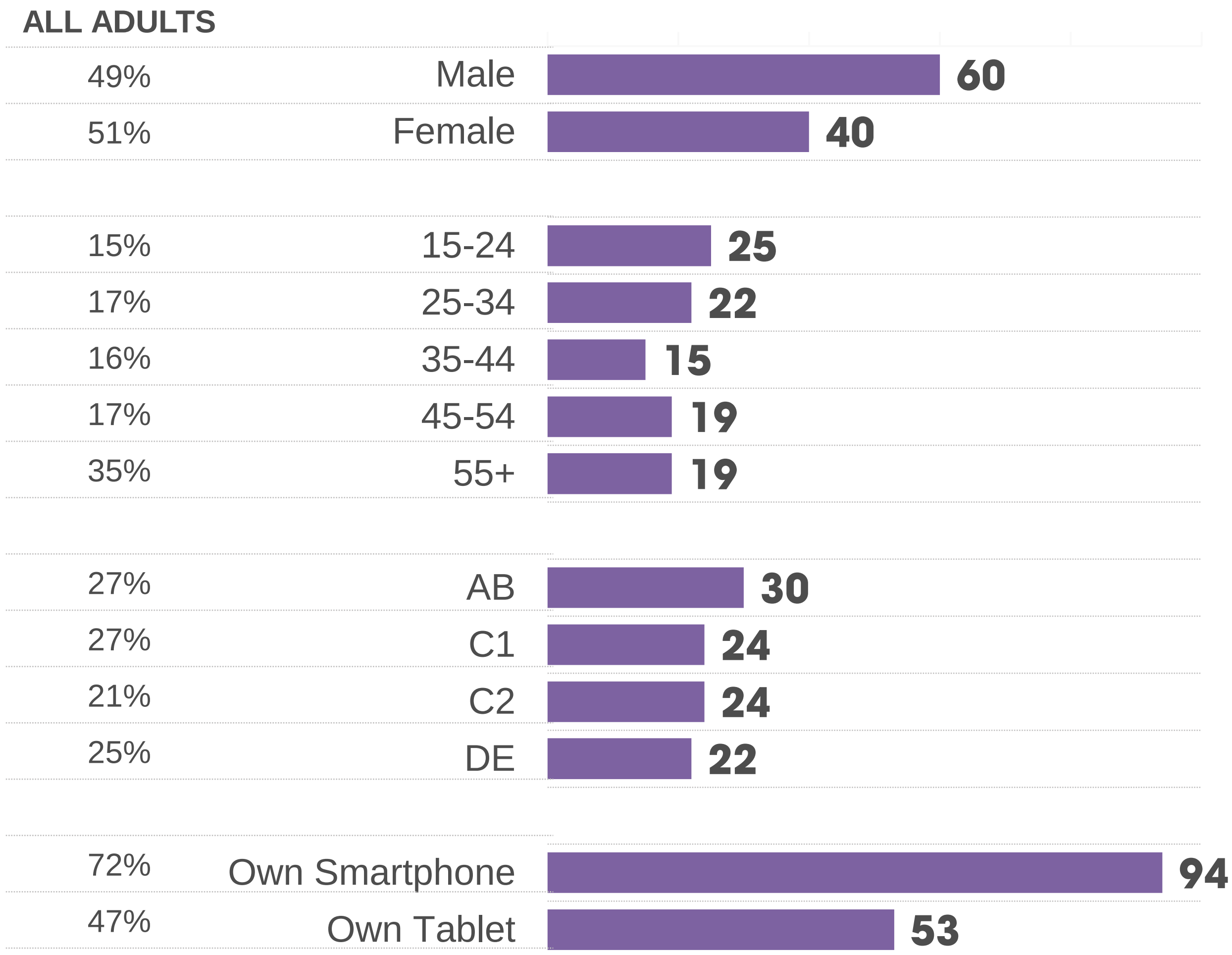
	All	15-24	25-34	35-44	45-54	55-64	65+
Males	52%	80%	72%	61%	49%	38%	15%
Males AB	53%	90%	81%	64%	62%	41%	20%
Males C1	59%	79%	76%	78%	54%	39%	17%
Males C2	47%	80%	69%	50%	37%	37%	8%
Males DE	48%	75%	66%	50%	41%	31%	11%
Females	55%	86%	76%	71%	58%	41%	16%
Females AB	55%	82%	79%	76%	56%	41%	25%
Females C1	61%	87%	82%	79%	68%	49%	19%
Females C2	57%	86%	76%	73%	57%	39%	12%
Females DE	49%	87%	68%	53%	49%	29%	9%

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

Base: circa 4,000 GB adults aged 15+: Q3/ Q4 2014 Q1/Q2 2015

Source: Ipsos MORI

PROFILE OF GOOGLE+ USERS



6 in 10 Google+ users are male.

There is near universal smartphone ownership amongst Google+ users.

Base: circa GB adults (1,000) / All visiting / using Google+ in last 3 months (150) Q2 2015

Source: Ipsos MORI

SOCIAL NETWORKING – 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	16%	22%	20%	23%	15%	13%	5%
Males AB	17%	21%	23%	26%	18%	20%	5%
Males C1	19%	21%	25%	33%	13%	14%	9%
Males C2	15%	27%	12%	20%	20%	8%	4%
Males DE	13%	20%	23%	10%	9%	7%	2%
Females	13%	21%	23%	13%	13%	10%	3%
Females AB	15%	18%	37%	10%	13%	13%	7%
Females C1	13%	23%	23%	9%	14%	10%	3%
Females C2	16%	26%	14%	20%	22%	12%	4%
Females DE	11%	17%	22%	14%	3%	6%	1%

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

Base: circa 4,000 GB adults aged 15+: Q3/ Q4 2014 Q1/Q2 2015

Source: Ipsos MORI

PROFILE OF TWITTER USERS

ALL ADULTS		
49%	Male	60
51%	Female	40
15%	15-24	33
17%	25-34	23
16%	35-44	20
17%	45-54	13
35%	55+	12
27%	AB	36
27%	C1	33
21%	C2	14
25%	DE	17
72%	Own Smartphone	95
47%	Own Tablet	67

Over three-quarters of Twitter users are aged under 45, with 7 in 10 ABC1.

As it is 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 (185) Q2 2015

Source: Ipsos MORI

SOCIAL NETWORKING – TWITTER

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

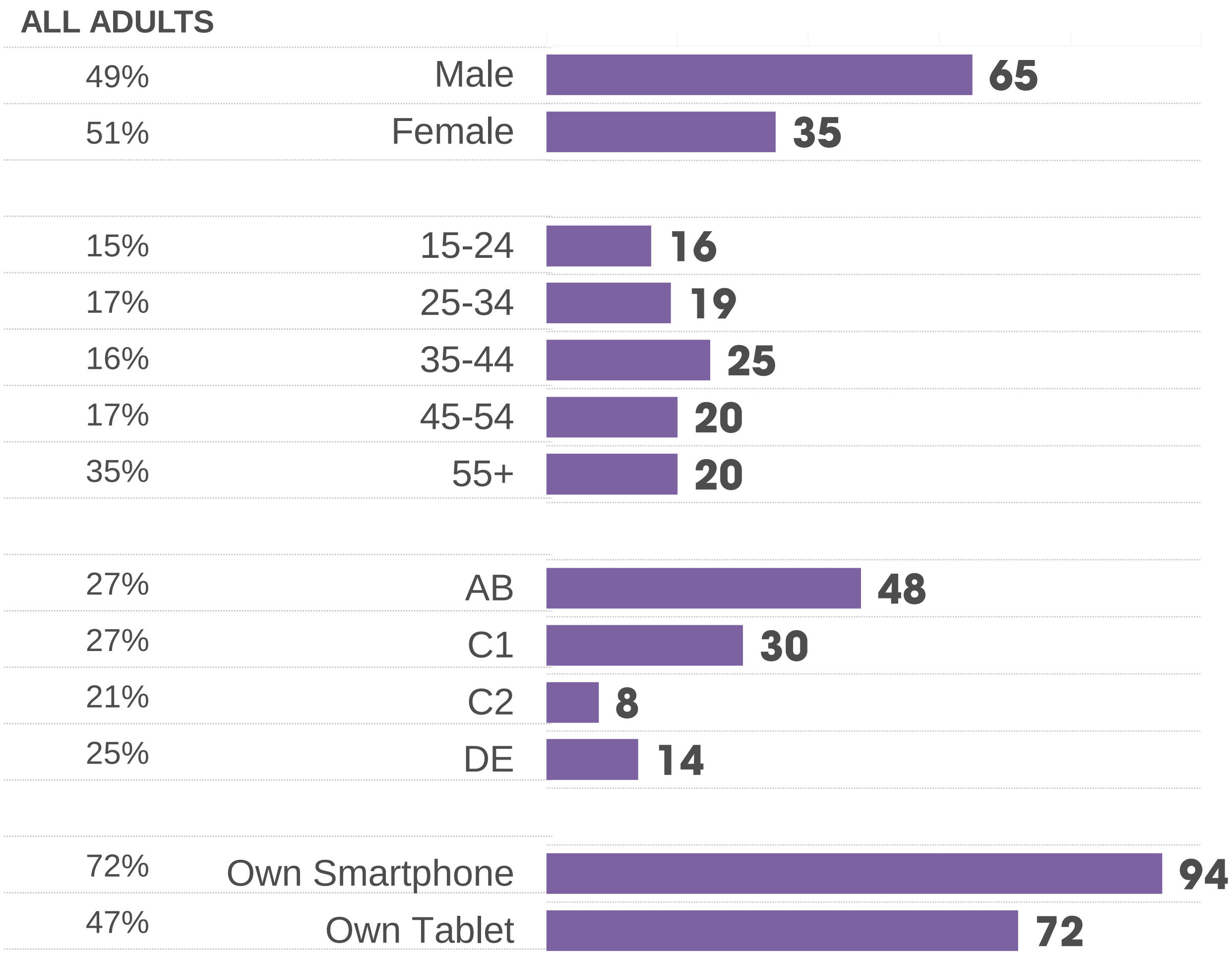
	All	15-24	25-34	35-44	45-54	55-64	65+
Males	20%	39%	27%	24%	17%	9%	3%
Males AB	25%	45%	43%	36%	30%	14%	6%
Males C1	24%	42%	36%	33%	16%	10%	3%
Males C2	15%	39%	20%	15%	11%	3%	1%
Males DE	13%	31%	17%	8%	9%	5%	1%
Females	16%	42%	21%	21%	11%	6%	2%
Females AB	19%	59%	35%	30%	11%	10%	4%
Females C1	20%	52%	27%	27%	14%	4%	2%
Females C2	15%	38%	21%	18%	8%	5%	0%
Females DE	9%	28%	7%	5%	6%	2%	0%

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

Base: circa 4,000 GB adults aged 15+: Q3/ Q4 2014 Q1/Q2 2015

Source: Ipsos MORI

PROFILE OF LINKEDIN USERS



Linkedin is a more specific social network: it has an older profile than the other social networks and almost half are social grade AB.

Base: circa GB adults (1,000) / All visiting / using Linkedin in last 3 months (109) Q2 2015

Source: Ipsos MORI

SOCIAL NETWORKING – LINKEDIN

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

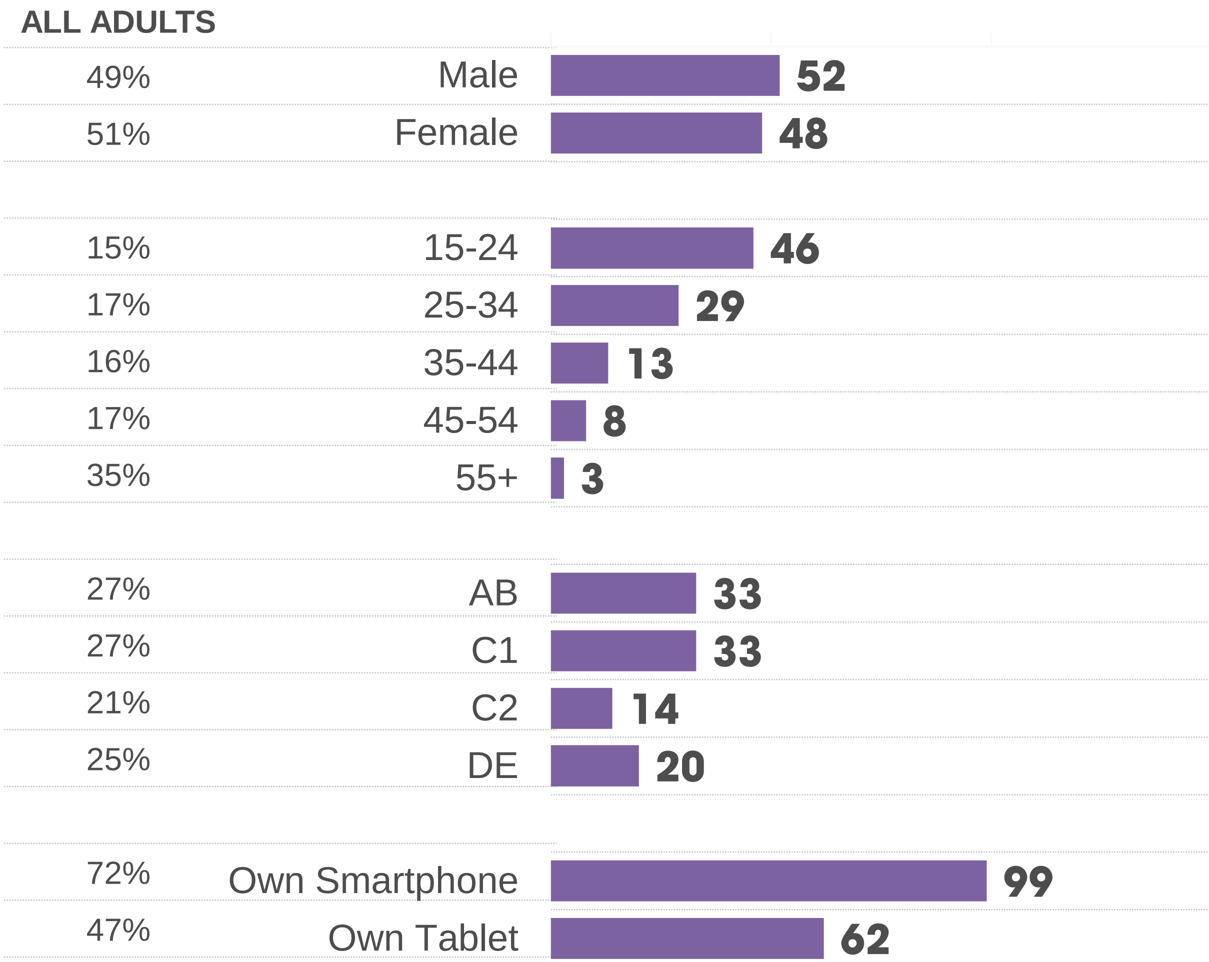
	All	15-24	25-34	35-44	45-54	55-64	65+
Males	14%	11%	20%	18%	18%	15%	3%
Males AB	25%	13%	42%	37%	37%	23%	5%
Males C1	16%	9%	24%	17%	23%	19%	1%
Males C2	6%	9%	8%	3%	5%	7%	3%
Males DE	7%	13%	13%	3%	6%	2%	2%
Females	9%	12%	10%	19%	10%	8%	2%
Females AB	19%	21%	20%	37%	19%	15%	6%
Females C1	11%	17%	11%	20%	9%	10%	1%
Females C2	5%	9%	9%	8%	1%	1%	0%
Females DE	2%	7%	2%	3%	0%	0%	0%

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

Base: circa 4,000 GB adults aged 15+: Q3/ Q4 2014 Q1/Q2 2015

Source: Ipsos MORI

PROFILE OF INSTAGRAM USERS



Almost half of all Instagram users are aged 15-24, with two-thirds being ABC1.

Instagram's functionality lends itself to almost universal Smartphone ownership.

Base: circa GB adults (1,000) / All visiting / using Linkedin in last 3 months (131) Q2 2015

Source: Ipsos MORI

SOCIAL NETWORKING – INSTAGRAM

% 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	13%	35%	24%	10%	4%	3%	0%
Males AB	13%	41%	37%	14%	7%	3%	1%
Males C1	16%	41%	21%	16%	2%	5%	0%
Males C2	10%	29%	20%	3%	4%	0%	0%
Males DE	12%	30%	22%	4%	4%	0%	0%
Females	14%	46%	23%	11%	7%	2%	0%
Females AB	13%	66%	28%	11%	9%	3%	0%
Females C1	17%	55%	31%	12%	7%	1%	1%
Females C2	15%	40%	24%	12%	8%	1%	0%
Females DE	11%	35%	13%	8%	1%	1%	0%

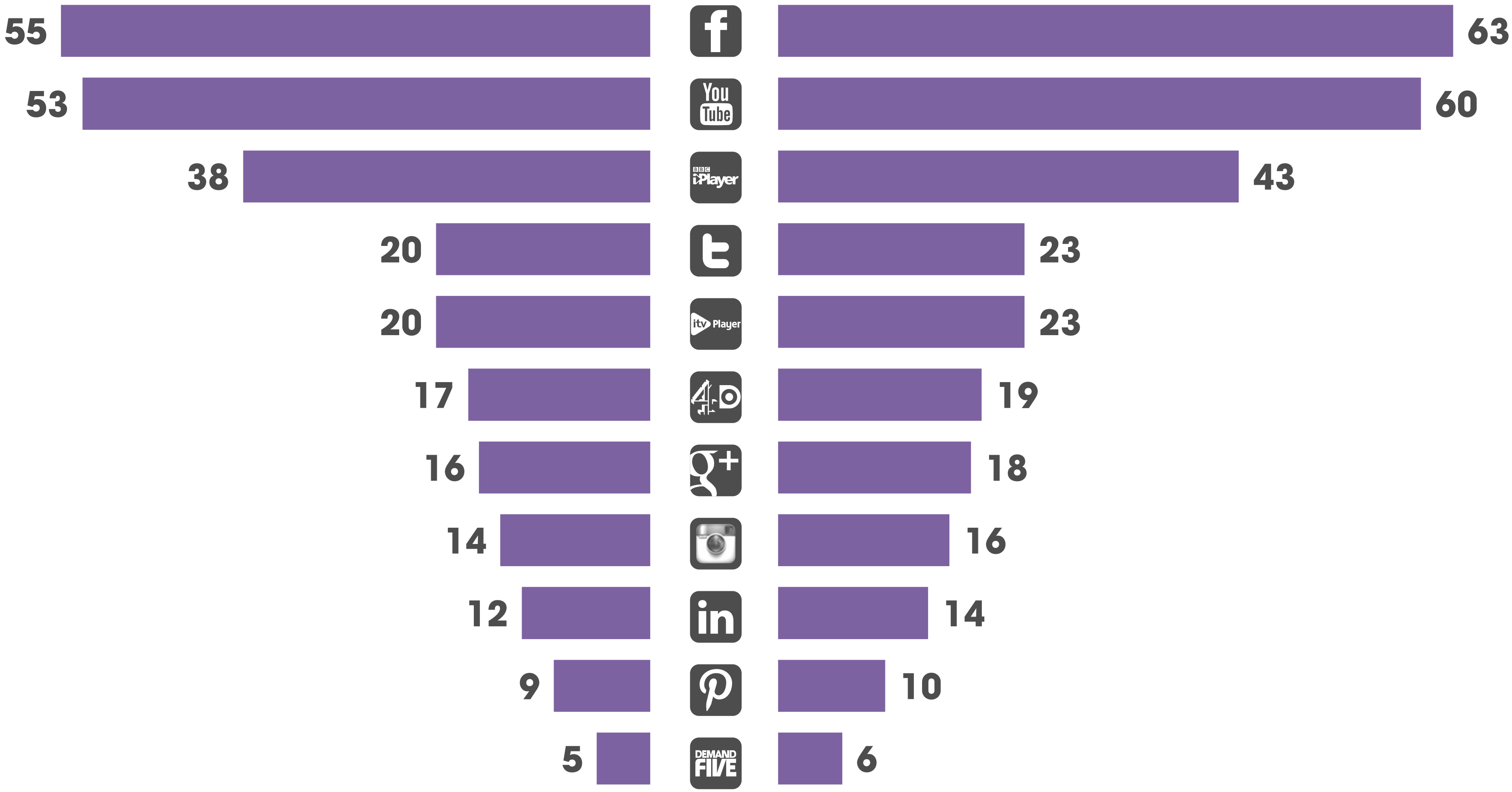
0-49% 50-79% 80-100%

Base: circa 4,000 GB adults aged 15+: Q3/ Q4 2014 Q1/Q2 2015

Source: Ipsos MORI

WEBSITES VISITED OR USED IN THE LAST 3 MONTHS

% VISITED IN LAST 3 MONTHS

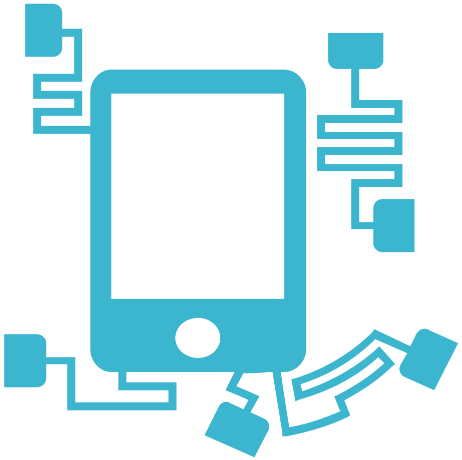


Base: circa GB adults 1,000 adults aged 15+: Q2 2015

Base: 865 GB online adults aged 15+: Q2 2015

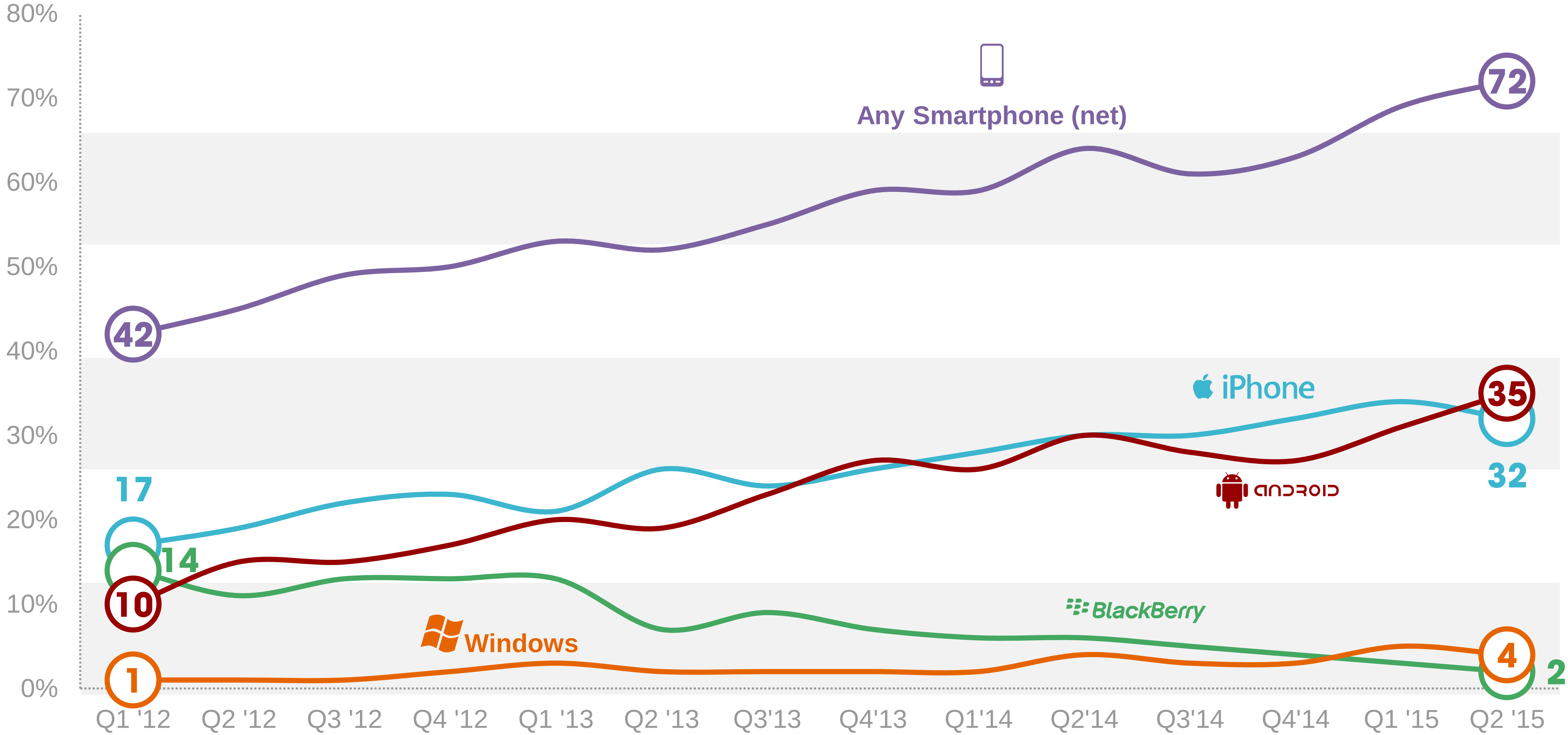
Source: Ipsos MORI

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

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	68%	91%	90%	85%	72%	57%	22%
Males AB	75%	98%	100%	98%	89%	70%	30%
Males C1	73%	94%	95%	86%	68%	65%	21%
Males C2	64%	87%	86%	73%	77%	44%	16%
Males DE	59%	86%	84%	74%	47%	32%	14%
Females	65%	90%	91%	86%	73%	48%	18%
Females AB	71%	93%	95%	93%	83%	62%	27%
Females C1	69%	95%	96%	88%	81%	51%	21%
Females C2	63%	82%	92%	86%	65%	40%	9%
Females DE	55%	88%	83%	74%	47%	32%	11%

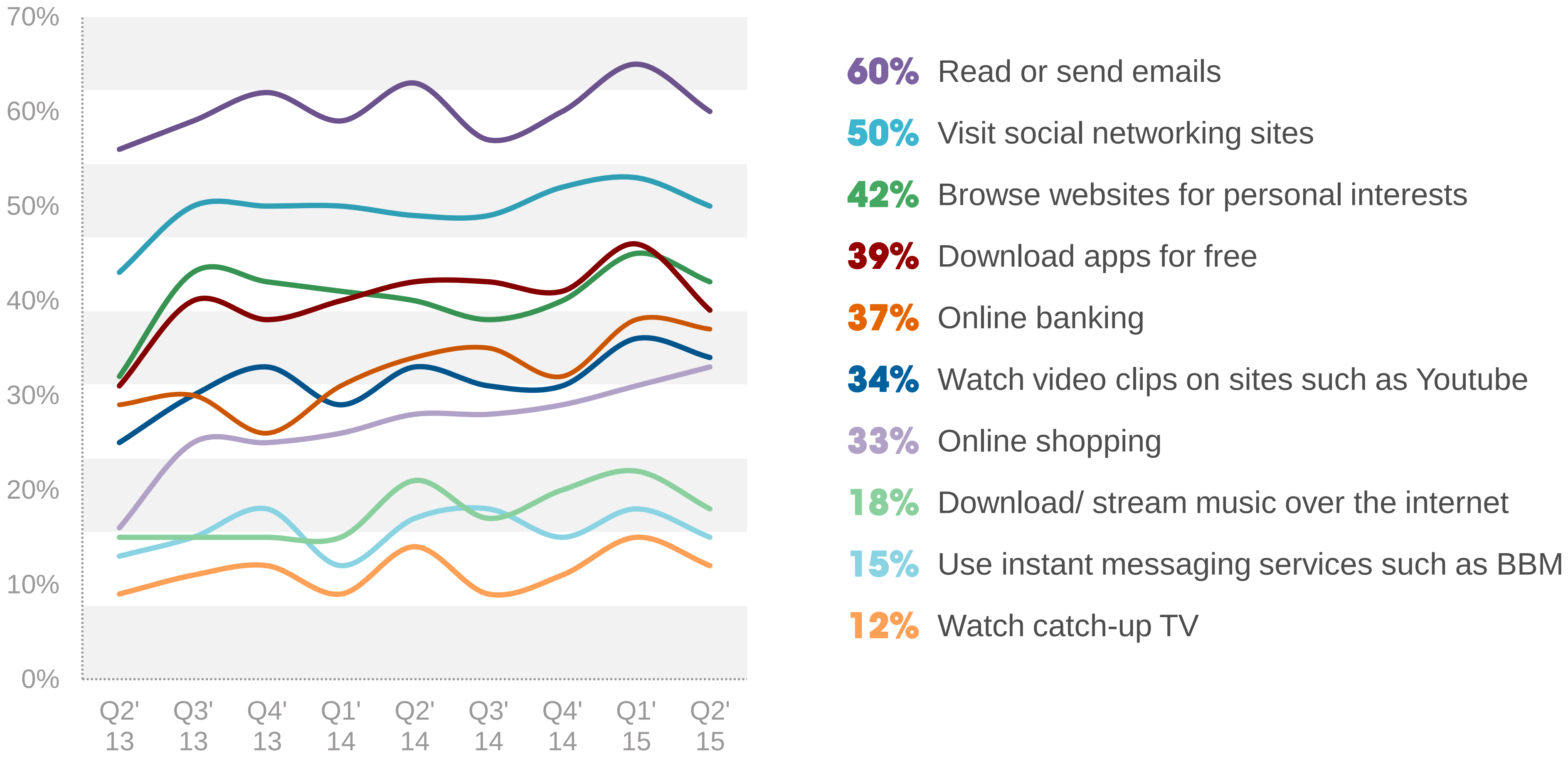
0-49% 50-69% 70-100%

Base: circa 4,000 GB adults aged 15+: Q3/ Q4 2014 Q1/Q2 2015

Source: Ipsos MORI

CHANGING WAYS SMARTPHONE IS USED

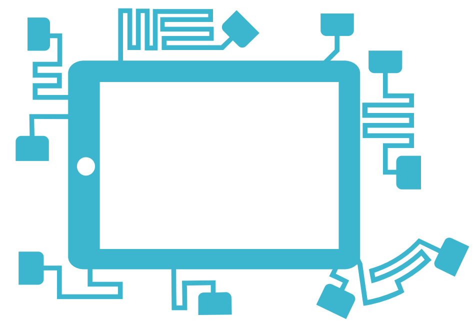
USE OF SMARTPHONE IN THE PAST 3 MONTHS



Base: circa 500-750 smartphone owners per wave

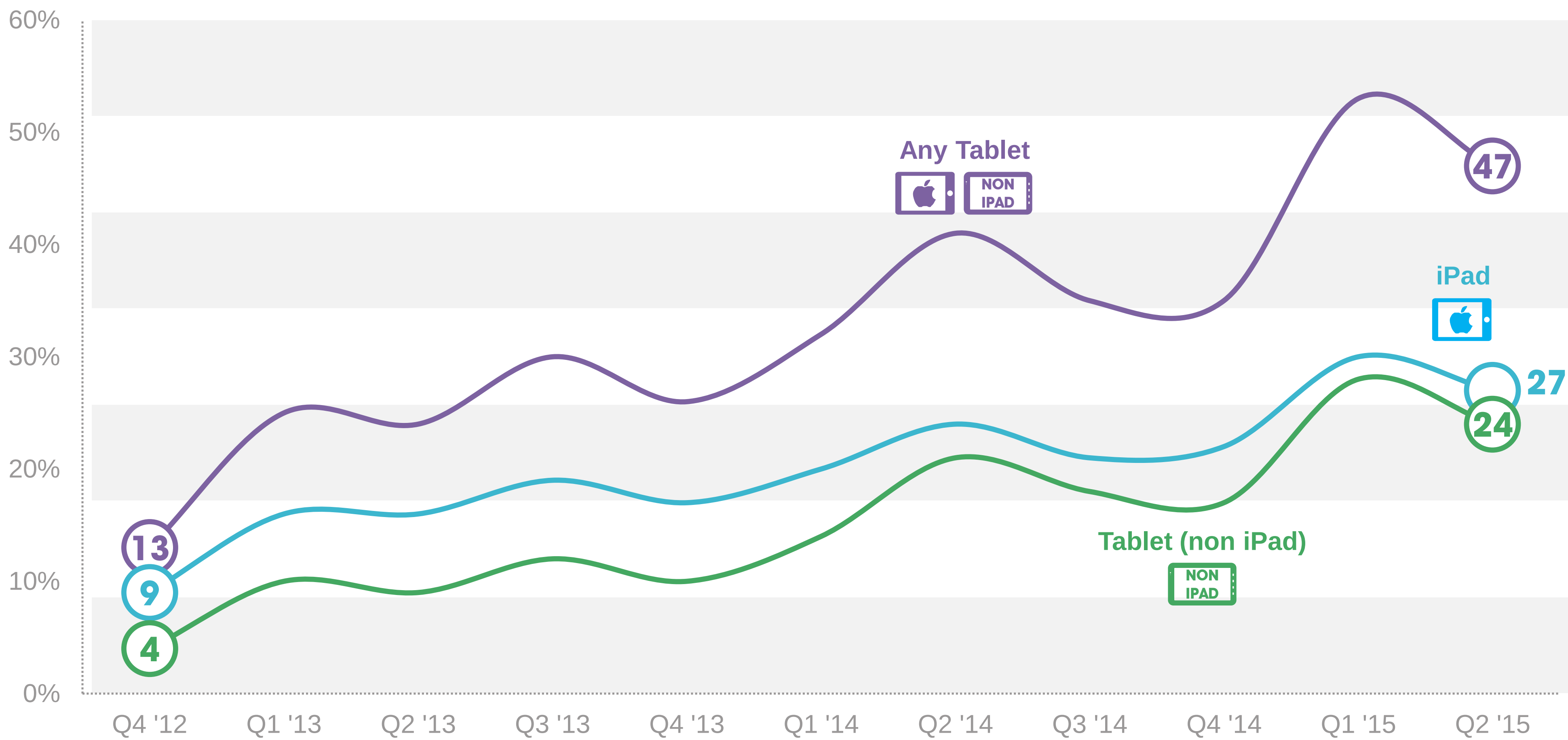
Source: Ipsos MORI

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

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	43%	43%	45%	55%	45%	43%	29%
Males AB	58%	58%	58%	76%	64%	58%	40%
Males C1	49%	43%	55%	60%	46%	55%	37%
Males C2	36%	46%	47%	41%	35%	25%	20%
Males DE	25%	30%	25%	31%	31%	18%	12%
Females	42%	43%	49%	56%	50%	41%	21%
Females AB	54%	64%	60%	68%	58%	48%	35%
Females C1	46%	49%	63%	56%	51%	50%	22%
Females C2	39%	36%	47%	55%	42%	36%	18%
Females DE	28%	34%	33%	43%	38%	22%	9%

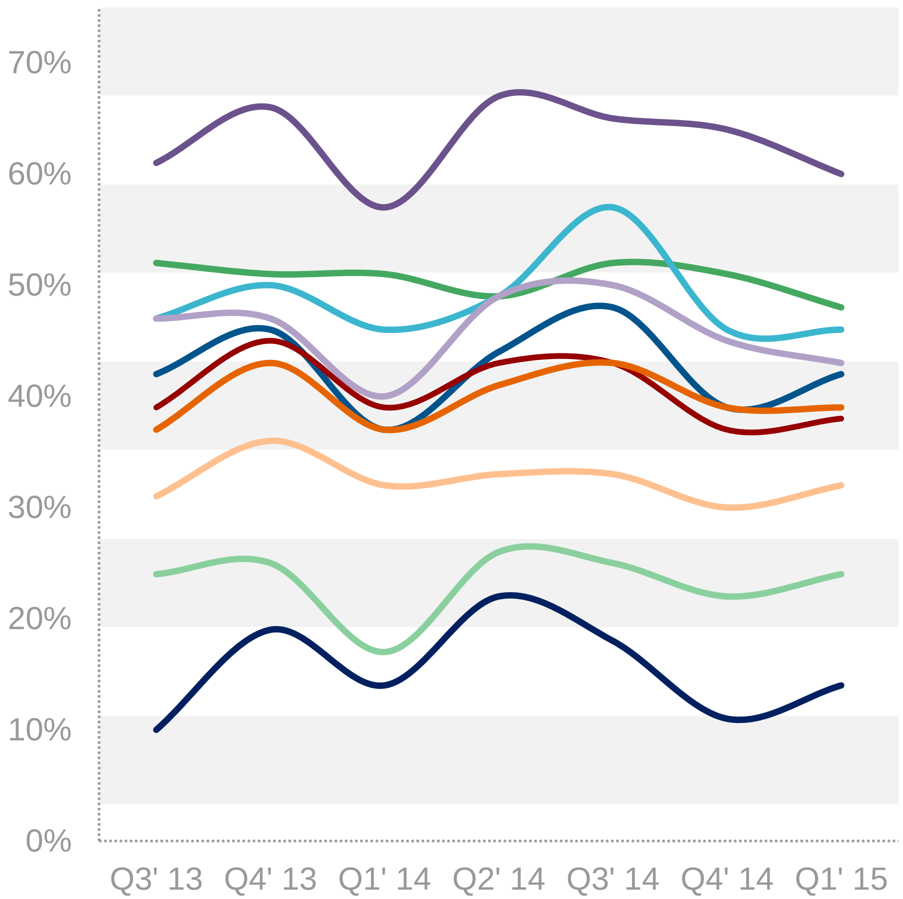
0-24% 25-49% 50-100%

Base: circa 4,000 GB adults aged 15+: Q3/ Q4 2014 Q1/Q2 2015

Source: Ipsos MORI

CHANGING WAYS TABLET IS USED

USE OF TABLET IN THE PAST 3 MONTHS



62% Read or send emails

49% Browse websites for personal interests

47% Visit social networking sites

45% Online shopping

43% Watch video clips on sites such as Youtube

42% Online banking

41% Download apps for free

29% Watch catch-up TV

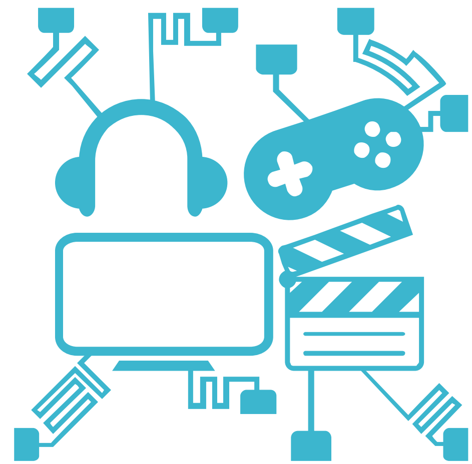
22% Download/ stream music over the internet

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

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

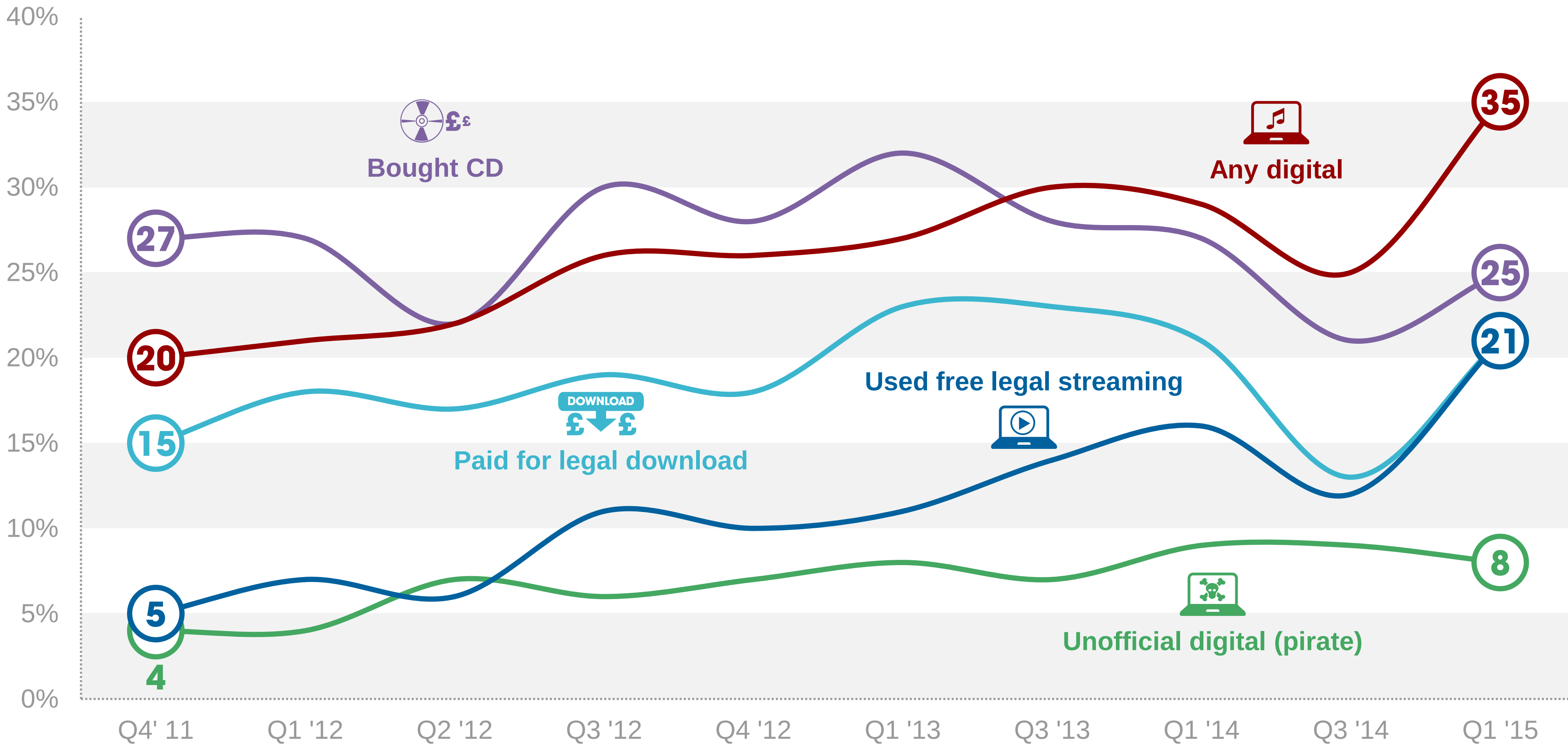
Source: Ipsos MORI

CONTENT CONSUMPTION MUSIC / GAMES / TV / MOVIES



HOW WE CONSUME MUSIC

MUSIC CONSUMPTION

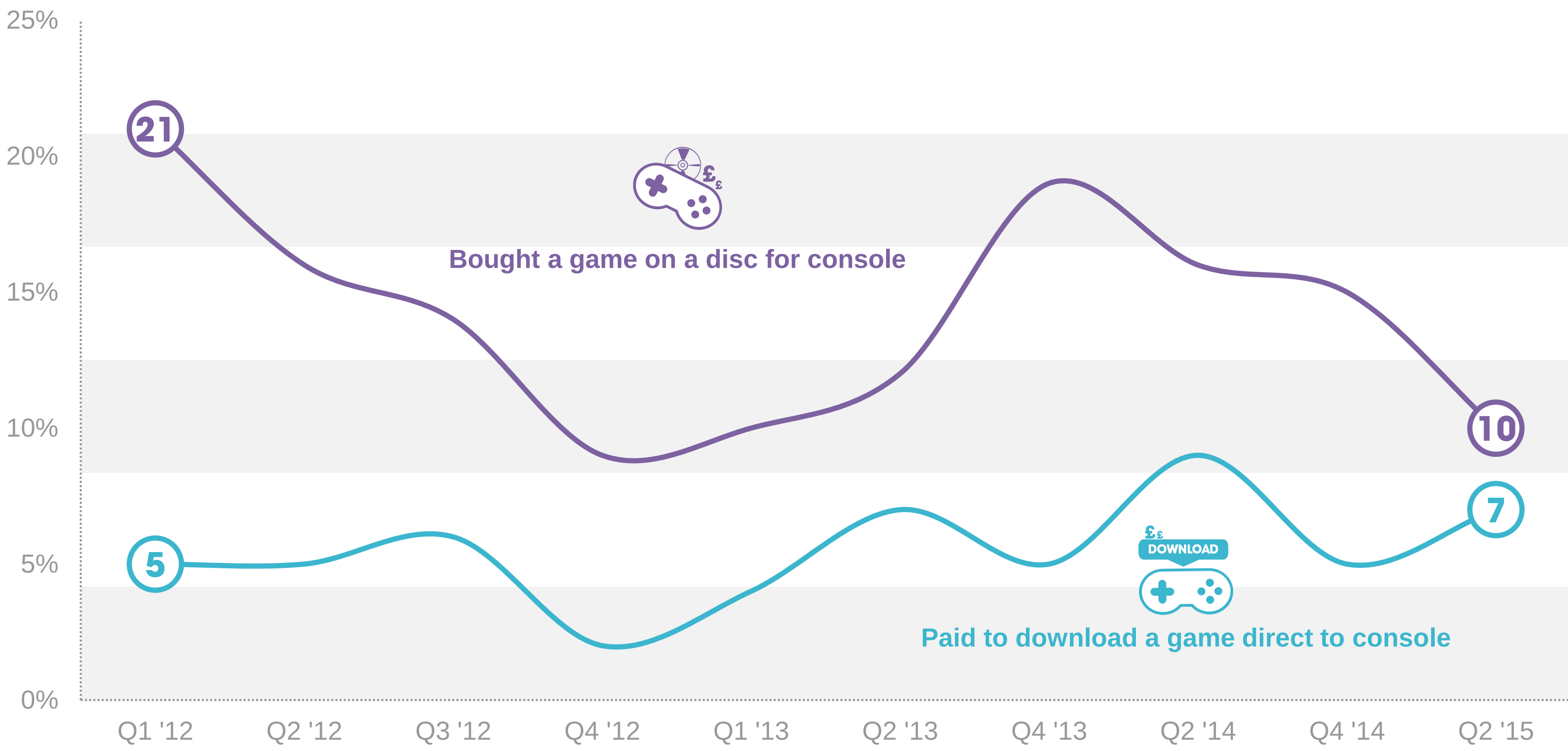


Base: circa 1,000 GB adults aged 15+ per wave / Music consumption is tracked every 6 months

Source: Ipsos MORI

HOW WE CONSUME GAMES FOR CONSOLES

GAMES CONSUMPTION

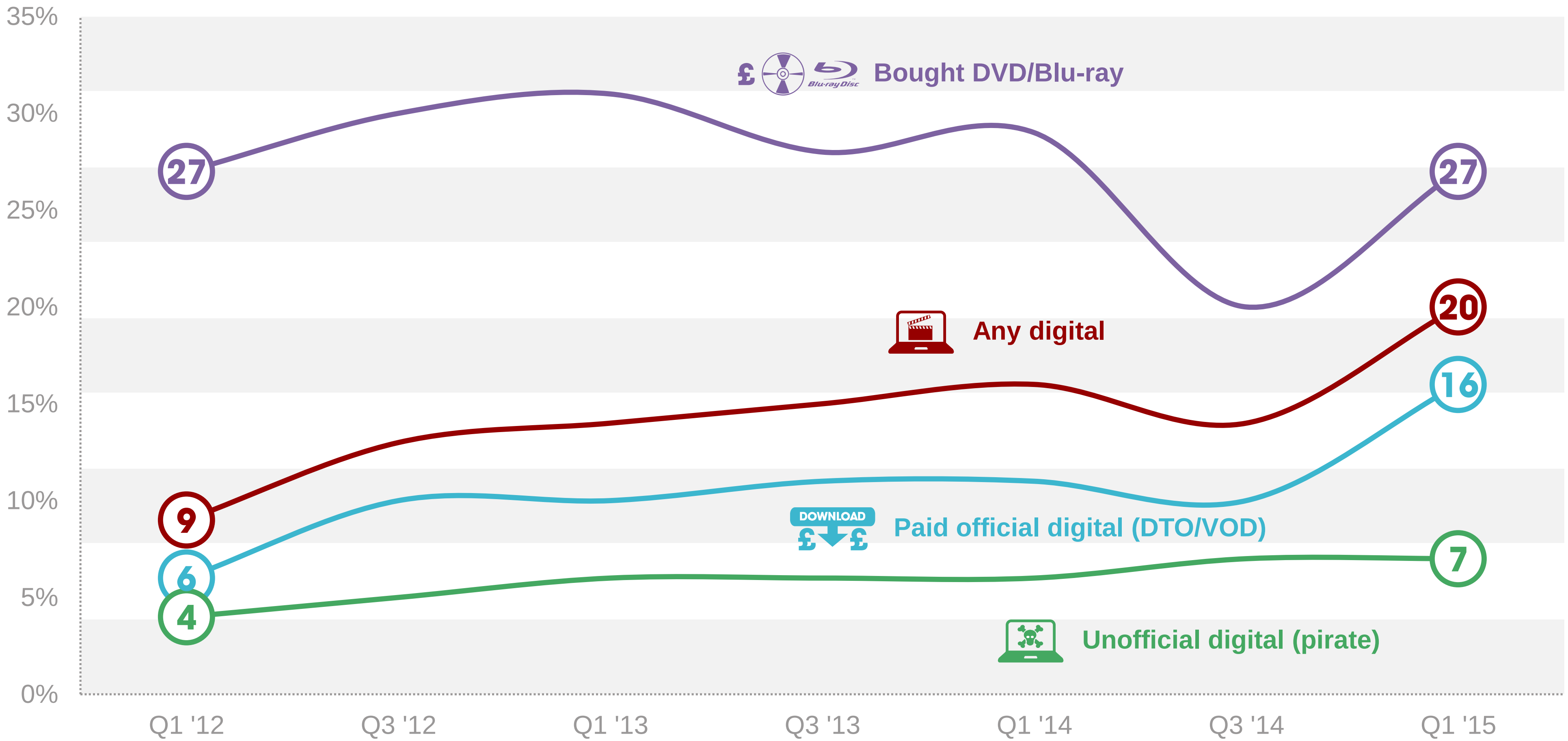


Base: circa 1,000 GB adults aged 15+ per wave / Games consumption is tracked every 6 months

Source: Ipsos MORI

HOW WE ACCESS MOVIES

MOVIE CONSUMPTION

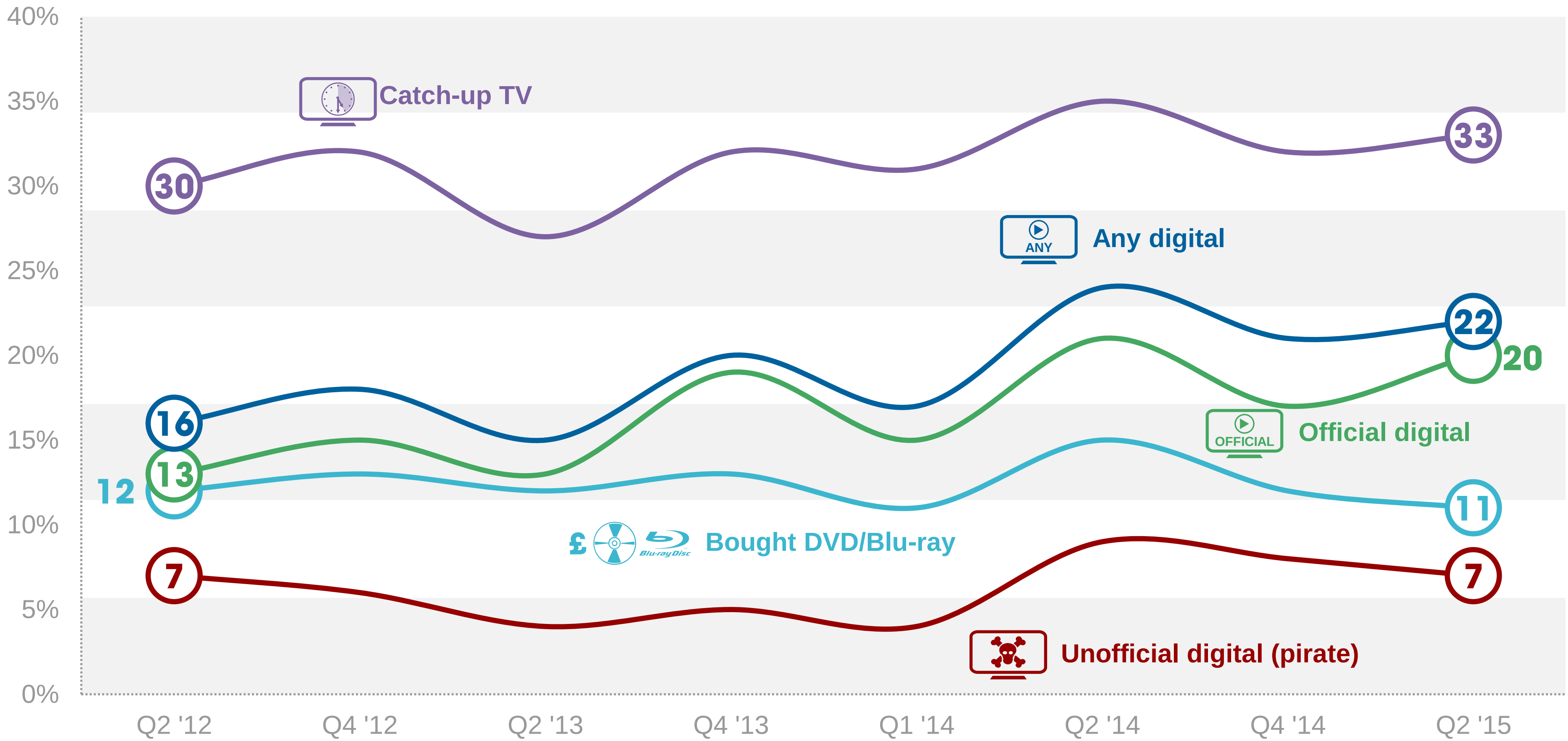


Base: circa 1,000 GB adults aged 15+ per wave / Movie consumption is tracked every 6 months

Source: Ipsos MORI

HOW WE ACCESS TV SERIES

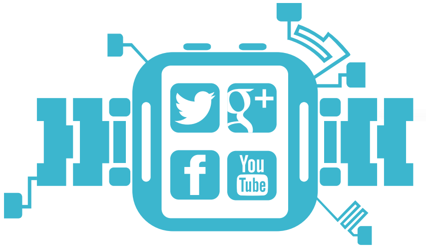
TV SERIES CONSUMPTION



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

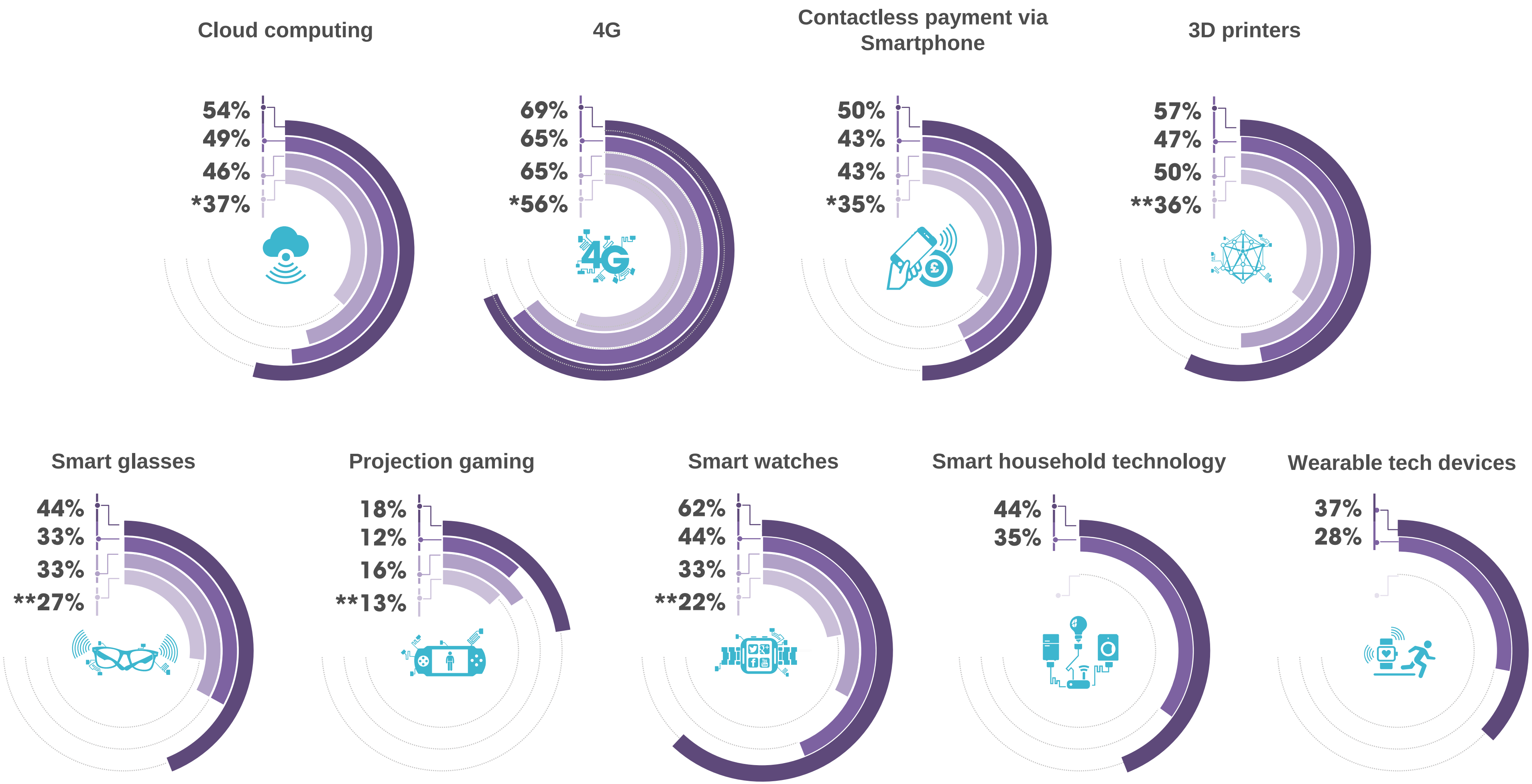
Source: Ipsos MORI

SMARTWATCHES AND WEARABLES



NEW TECHNOLOGY AND PRODUCT AWARENESS

% AWARE : Quarter 2 2015



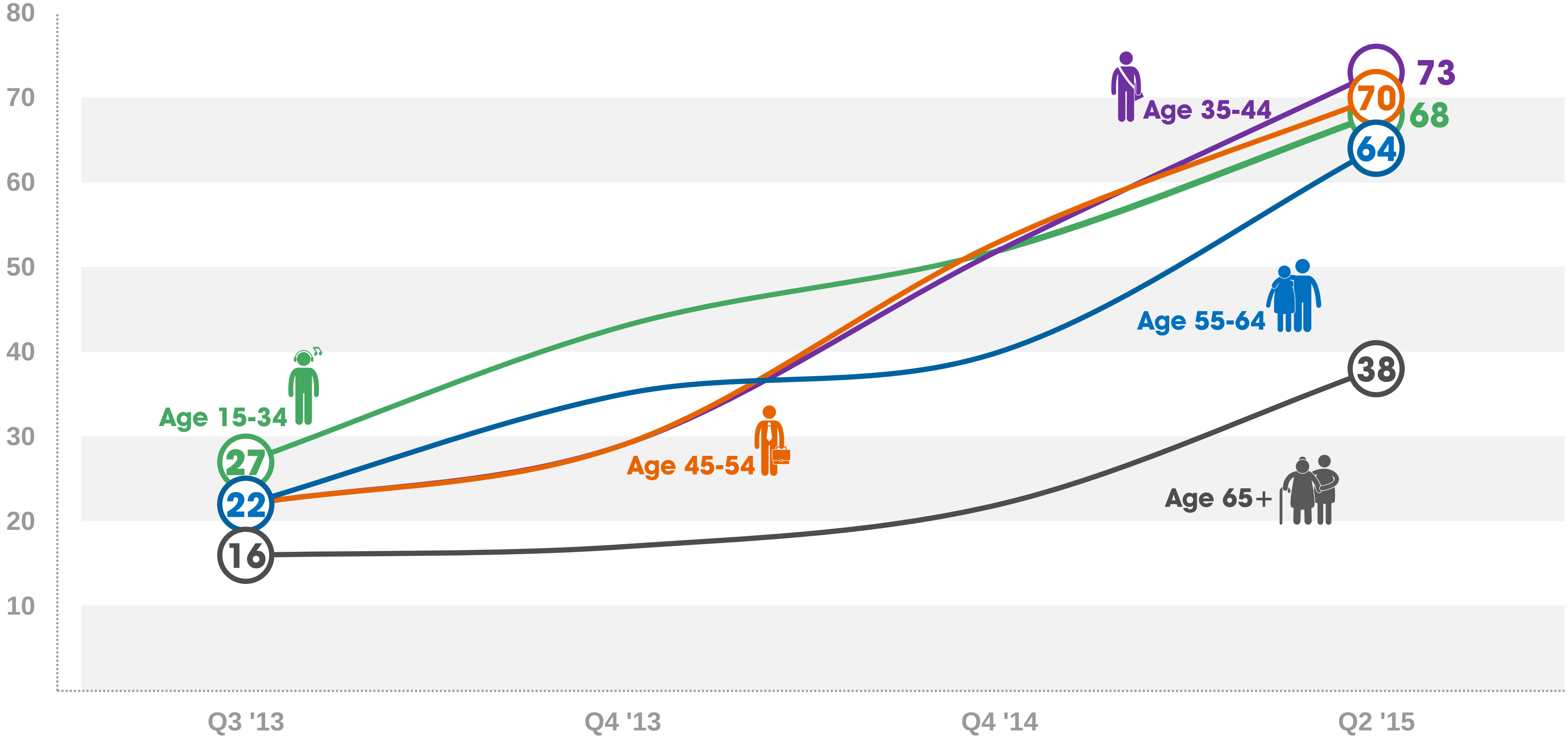
*Q4 2012/ **Q3 2013 | Q4 2013 | Q4 2014 | Q2 2015

Base: circa 1,000 GB adults aged 15+: Q2 2015

Source: Ipsos MORI

TRENDS IN AWARENESS - SMARTWATCHES

% AWARE BY AGE

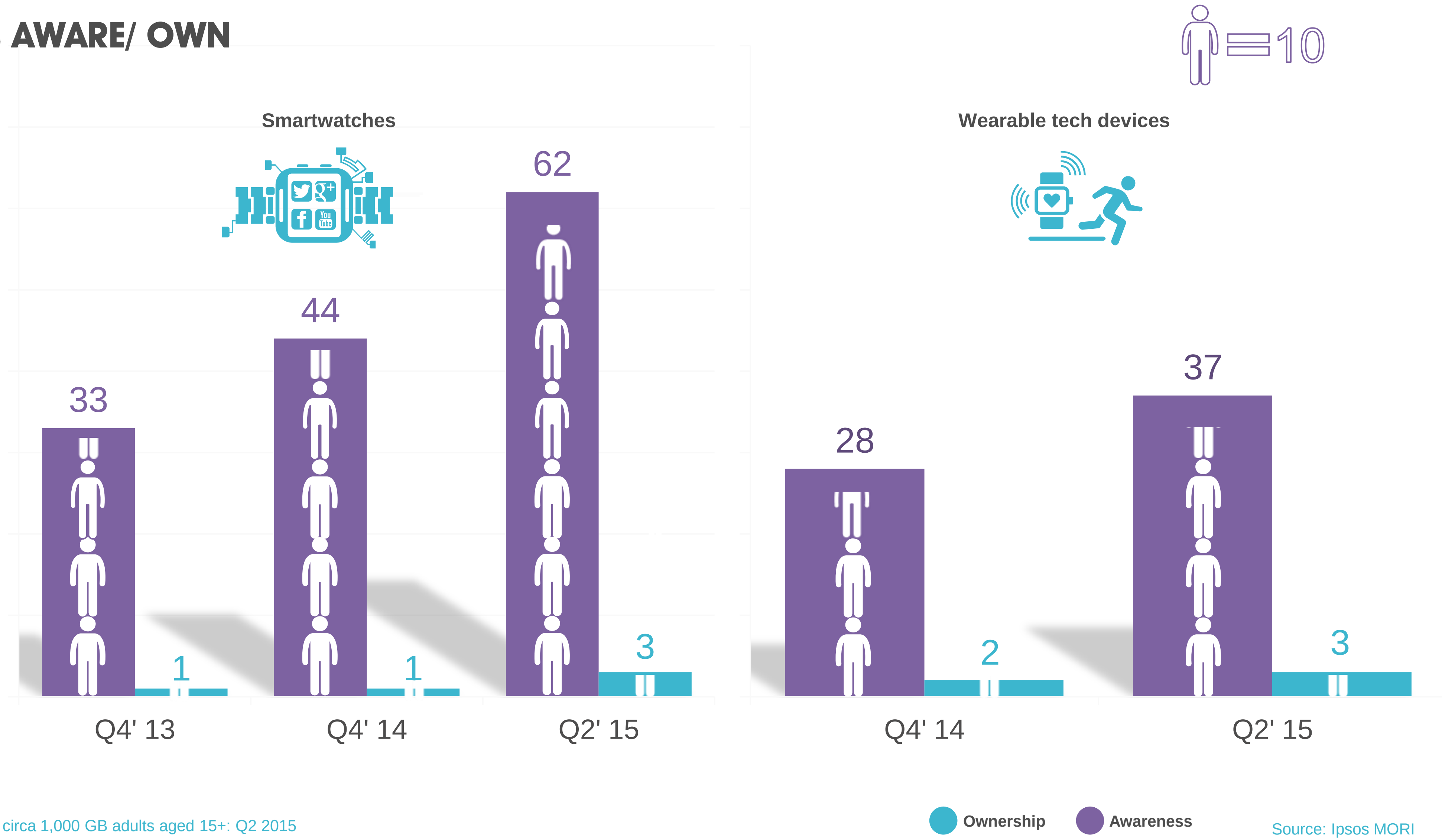


Base: circa 1,000 GB adults aged 15+ per wave

Source: Ipsos MORI

SMARTWATCH AND WEARABLE AWARENESS/ OWNERSHIP

% AWARE/ OWN

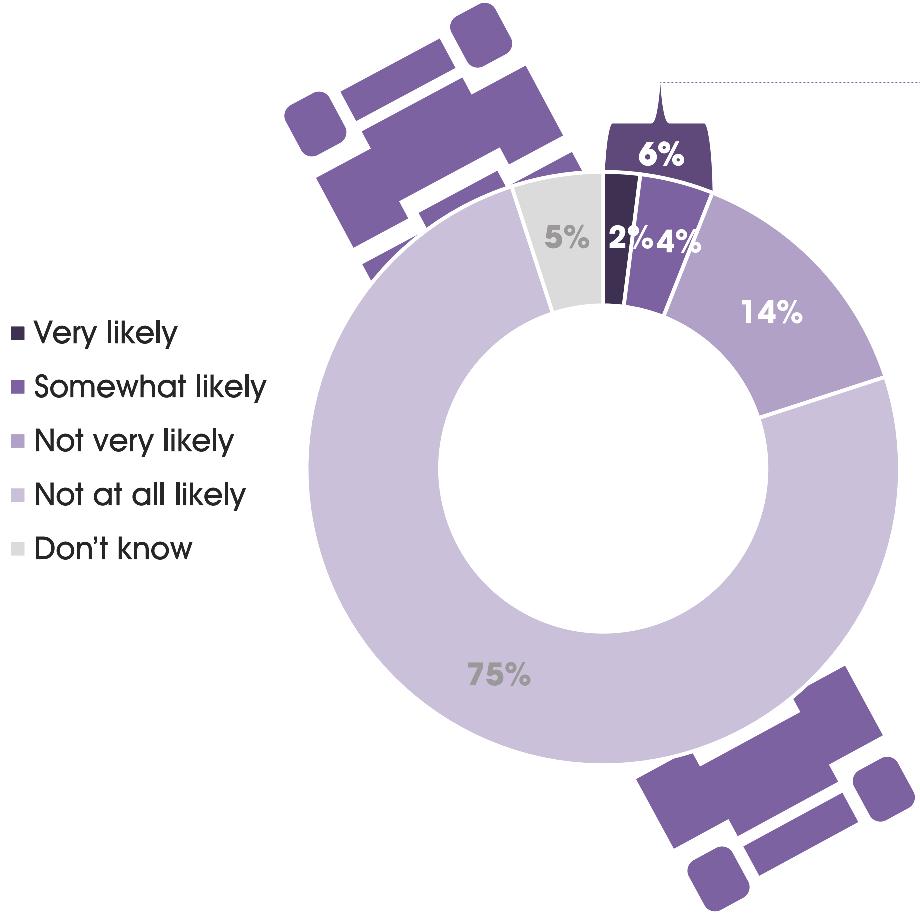


Base: circa 1,000 GB adults aged 15+: Q2 2015

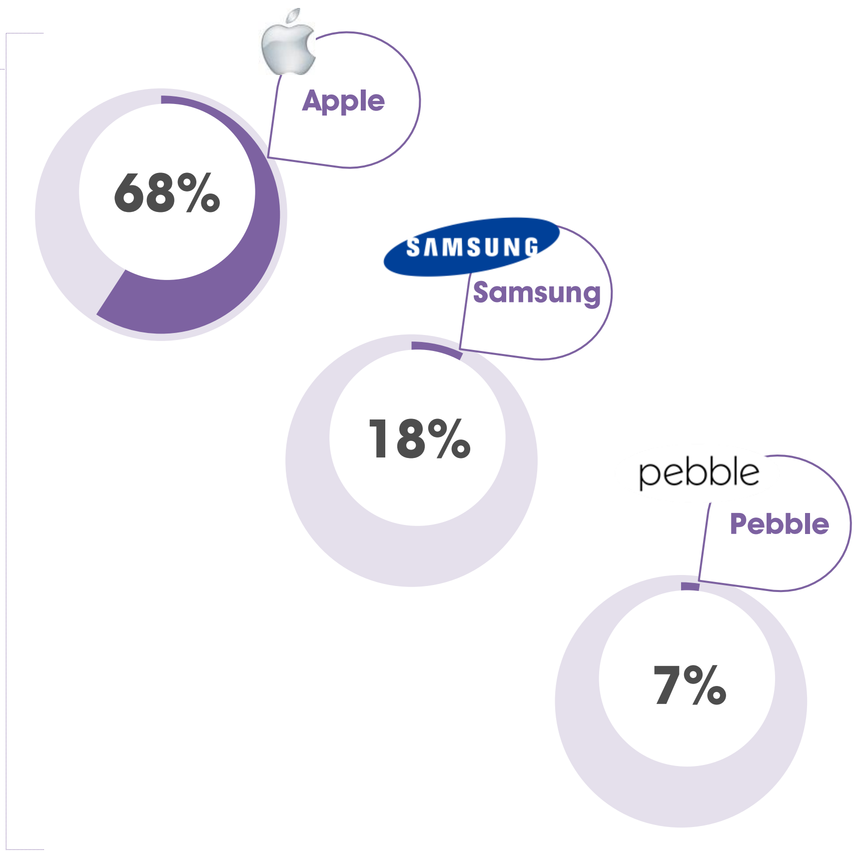
Source: Ipsos MORI

LIKELIHOOD TO PURCHASE SMARTWATCH IN NEXT 12 MONTHS

LIKELIHOOD TO PURCHASE



BRANDS WOULD CONSIDER



Base: Non-Smartwatch owners (991), GB adults likely to purchase smartwatch in next 12 months (52)

Source: Ipsos MORI

TECH TRACKER TECHNICAL DETAILS

Ipsos MORI interviewed a quota sample of **1018 adults aged 15+ in GB.**

The latest interviews were carried out face to face **17th – 24th April 2015.**

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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About Ipsos Connect

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.

Ipsos Connect is a specialist division within Ipsos, one of the world's largest market research agencies. Ipsos has offices in 87 countries, generating global revenues of €1.669,5 million (2 218,4M$) in 2014.