Ipsos MediaCT
The Media, Content and Technology Research Specialists

TECH TRACKER
QUARTERLY RELEASE: Q2 2012

Technology Tracker

QUARTERLY TRACKER - TRENDS IN TECH OWNERSHIP, INTERNET ACCESS AND THE CONNECTED HOME

GB FACE TO FACE SURVEY

LATEST WAVE
QUARTER 2 2012

REPRESENTATIVE SAMPLE OF 971 GB ADULTS AGED 15+

AREAS COVERED

- Internet usage
- Connected home
- Social Networking
- Smartphones/Tablets
- Music/games & movies/TV

Headlines

Internet usage

The proportion of adults accessing the internet is stable at 79% with 4 in 10 now accessing via a mobile.

The top activities online remain: accessing email (72%), browsing for information on hobbies (67%), researching products and services (62%) and online shopping (55%).

Connected home

The proportion of adults accessing the internet via a TV remains at 12%, with most using a games console connected to the TV. The main reasons given for this are online gaming and catch-up TV, followed by video clips and browsing the web.

7% of adults own a internet enabled TV and just 4 in 10 internet TV owners use it to connect to the web.

Social Networking

Social networking sites are mainly accessed through PCs/laptops but access via mobiles continues to grow. Only 2% access social networks via a TV connected to the internet.

44% of all adults have used Facebook in the past 3 months and 17% have used Google+ (the Google social network site).

Smartphones/ Tablets

Smartphone ownership has risen in the past 12 months to 45%. Ownership of iPhones at 19% is ahead of Android smartphone ownership (15%) and BlackBerry (11%).

1 in 10 adults own a Tablet PC with iPad the dominant brand (74% share).

Music/games & movies/TV

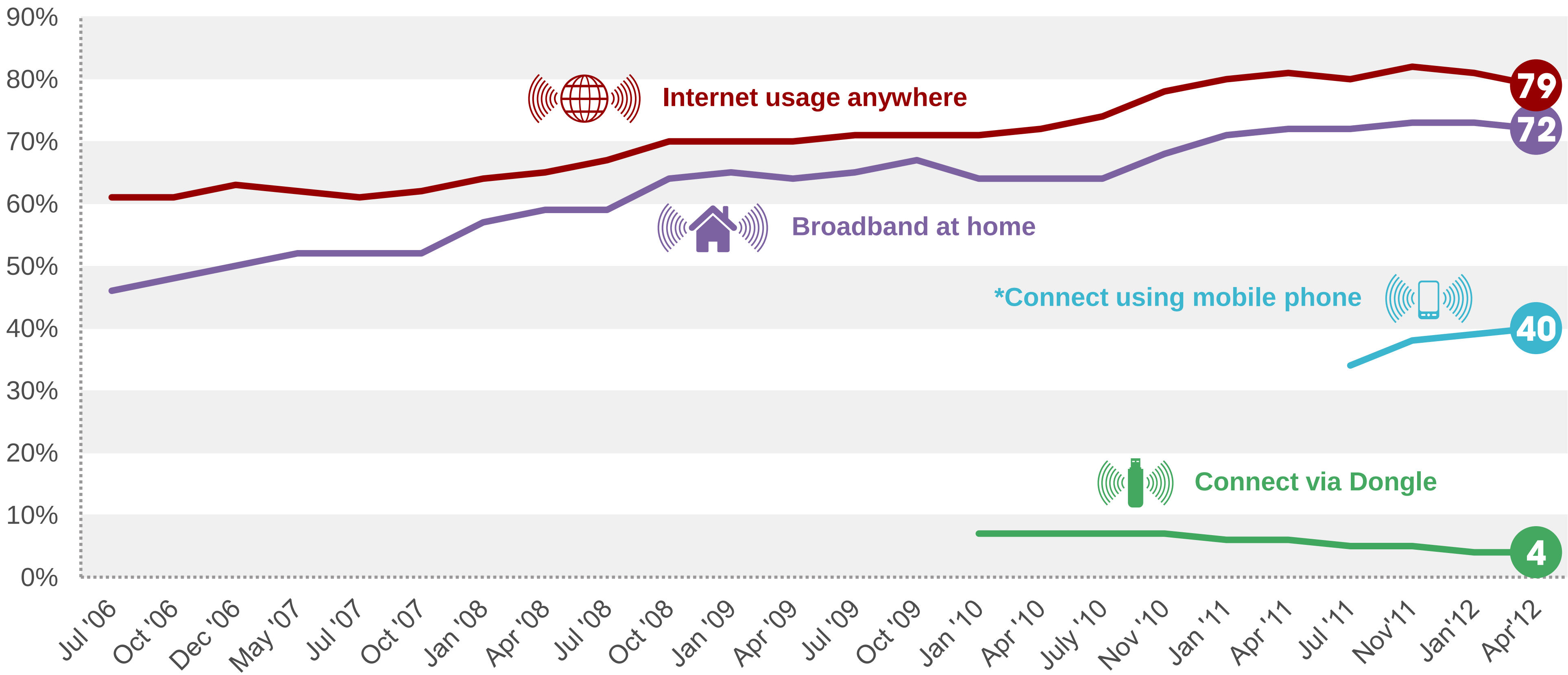
There has been a decline in the proportion of adults buying physical discs in the music, games, movies and TV sectors - a gap that is not being made up by purchases in the digital sector.

INTERNET USAGE

HOW, WHEN, WHERE

INTERNET USAGE TRENDS

WHICH OF THE FOLLOWING APPLIES TO YOU?



* 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 January 2010, circa 1,000 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 2011/2012

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	83	93	94	92	85	79	55
Males AB	94	100	100	98	98	93	81
Males C1	90	95	100	98	93	88	63
Males C2	77	94	94	89	81	74	31
Males DE	66	87	83	71	63	49	29
Females	78	91	93	89	88	76	42
Females AB	92	100	100	99	97	91	67
Females C1	87	97	98	95	95	83	55
Females C2	77	92	93	87	92	77	35
Females DE	55	78	82	67	65	50	17

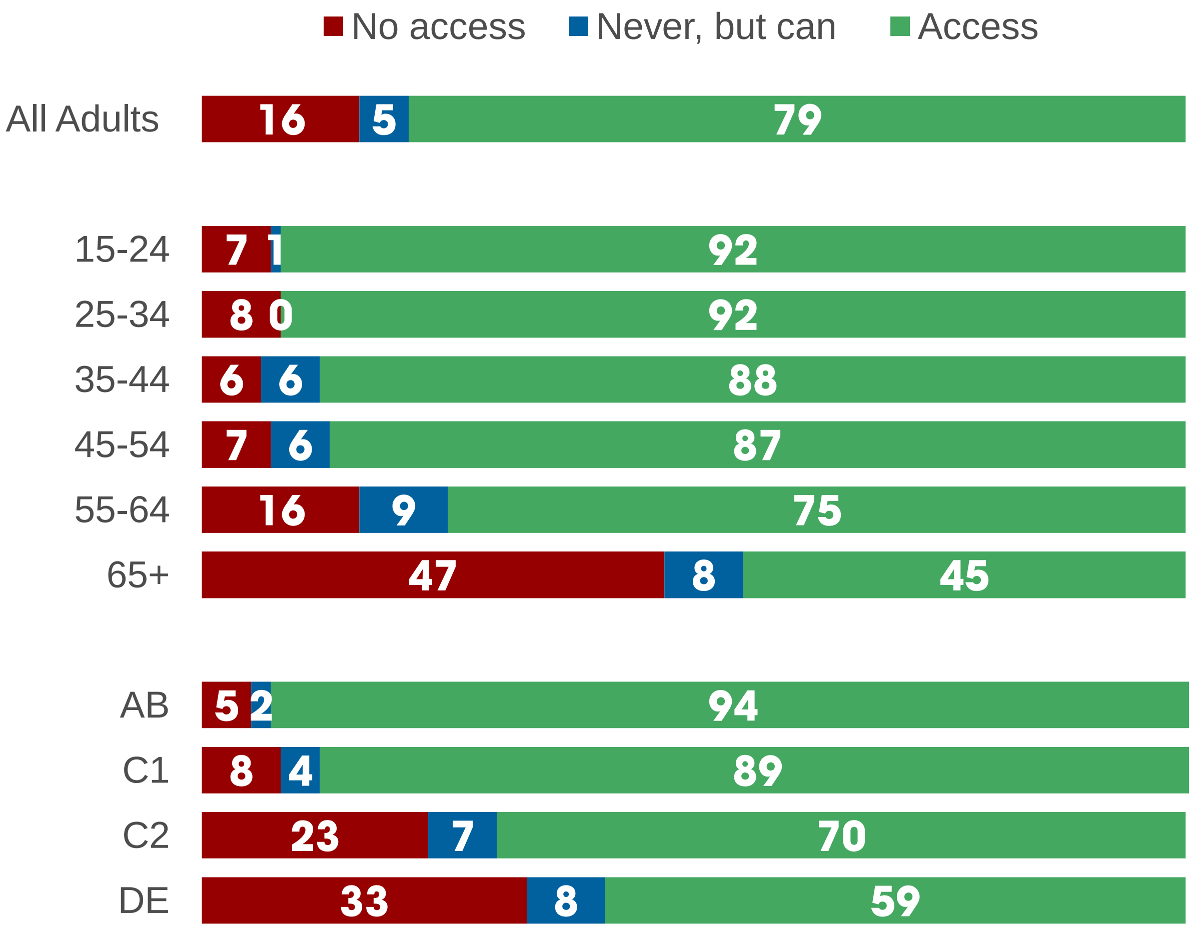
0-49% 50-79% 80-100%

Base: 3,950 GB adults aged 15+: July/ Nov 2011/ Jan/ Apr 2012

Source: Ipsos MORI

WHO IS AND ISN'T ACCESSING THE INTERNET

% ACCESS TO THE INTERNET: APRIL 2012



In April 2012, 16% of the GB adult population have no access to the internet in any way.

A further 5% of adults have the capability to access the internet but choose not to.

The digital divide is closing but is most apparent amongst some of the most socially and economically disadvantaged people. Those aged 55 or over, or from lower social grades, are more likely than average not to access the internet.

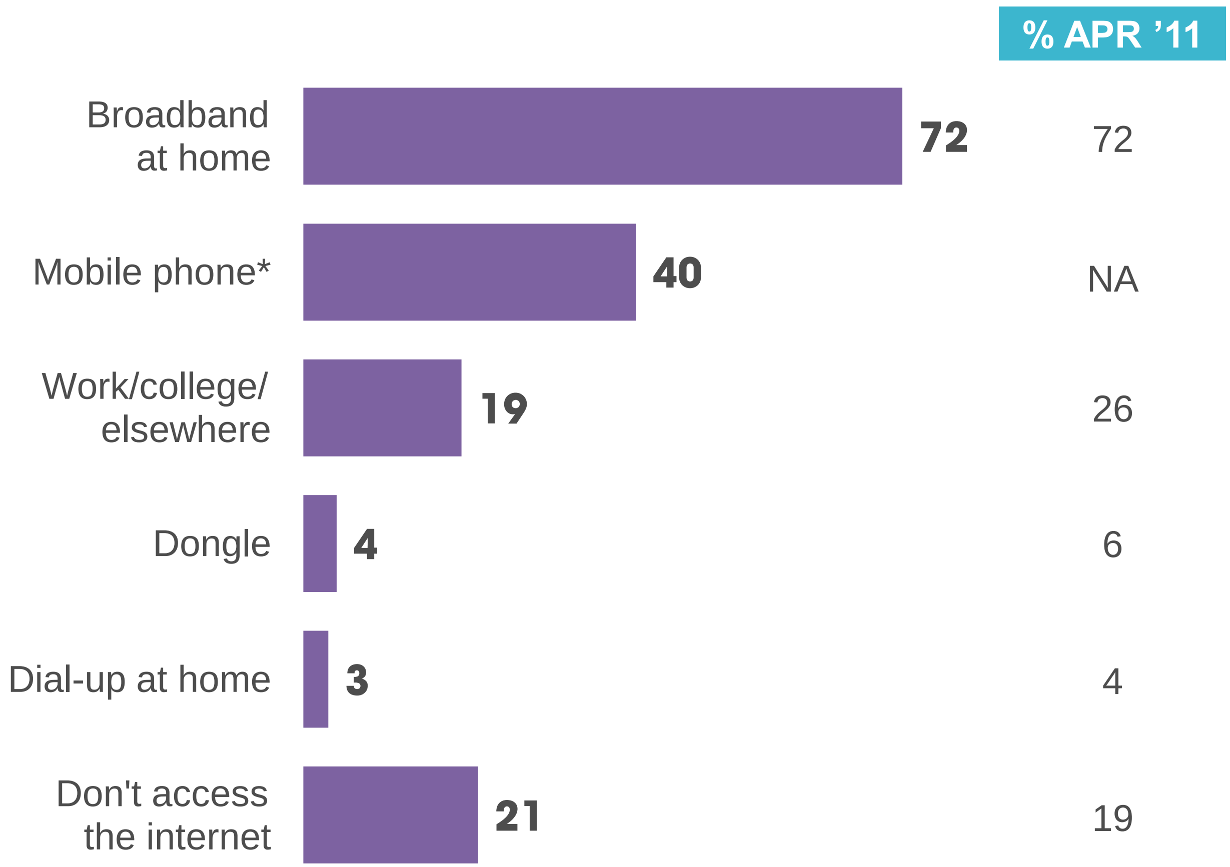
In contrast, more than 9 in 10 of those aged 15-24 or AB social grade have access to the web.

: Base: 971 GB adults aged 15+: April 2012

Source: Ipsos MORI

HOW PEOPLE CONNECT TO THE INTERNET

% ACCESS TO THE INTERNET: APRIL 2012



In the past year, the proportion of homes accessing the internet via broadband at home is unchanged at 72%.

40% now access the internet via their mobile phone and only 3% access via dial-up.

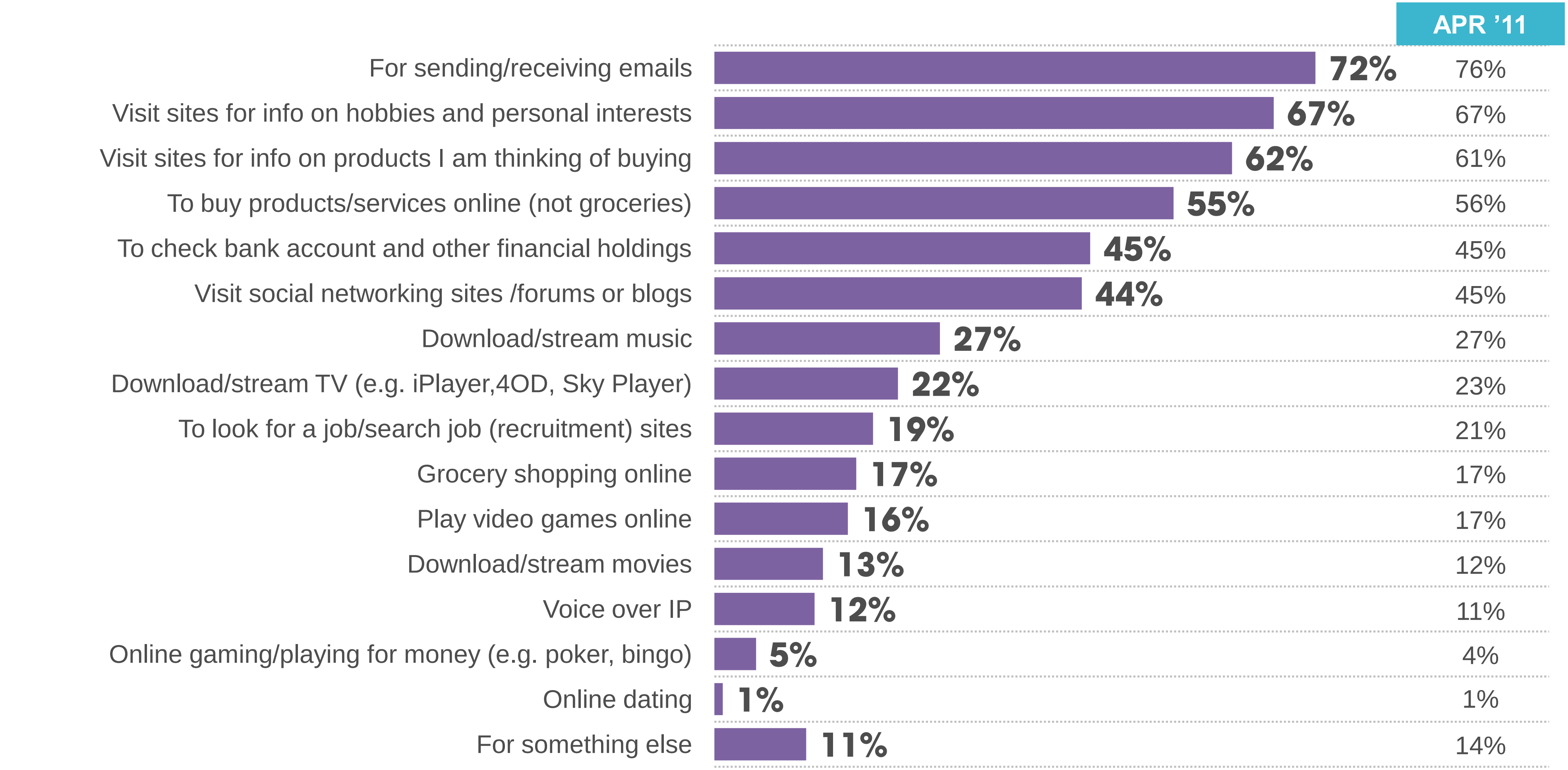
* The wording used for measuring 'internet connection by mobile phone' has been updated which means earlier data is not strictly comparable and is therefore not shown

: Base: 971 GB adults aged 15+: April 2012

Source: Ipsos MORI

WAYS THE INTERNET IS USED

USE OF THE INTERNET IN THE PAST 3 MONTHS: APRIL 2012

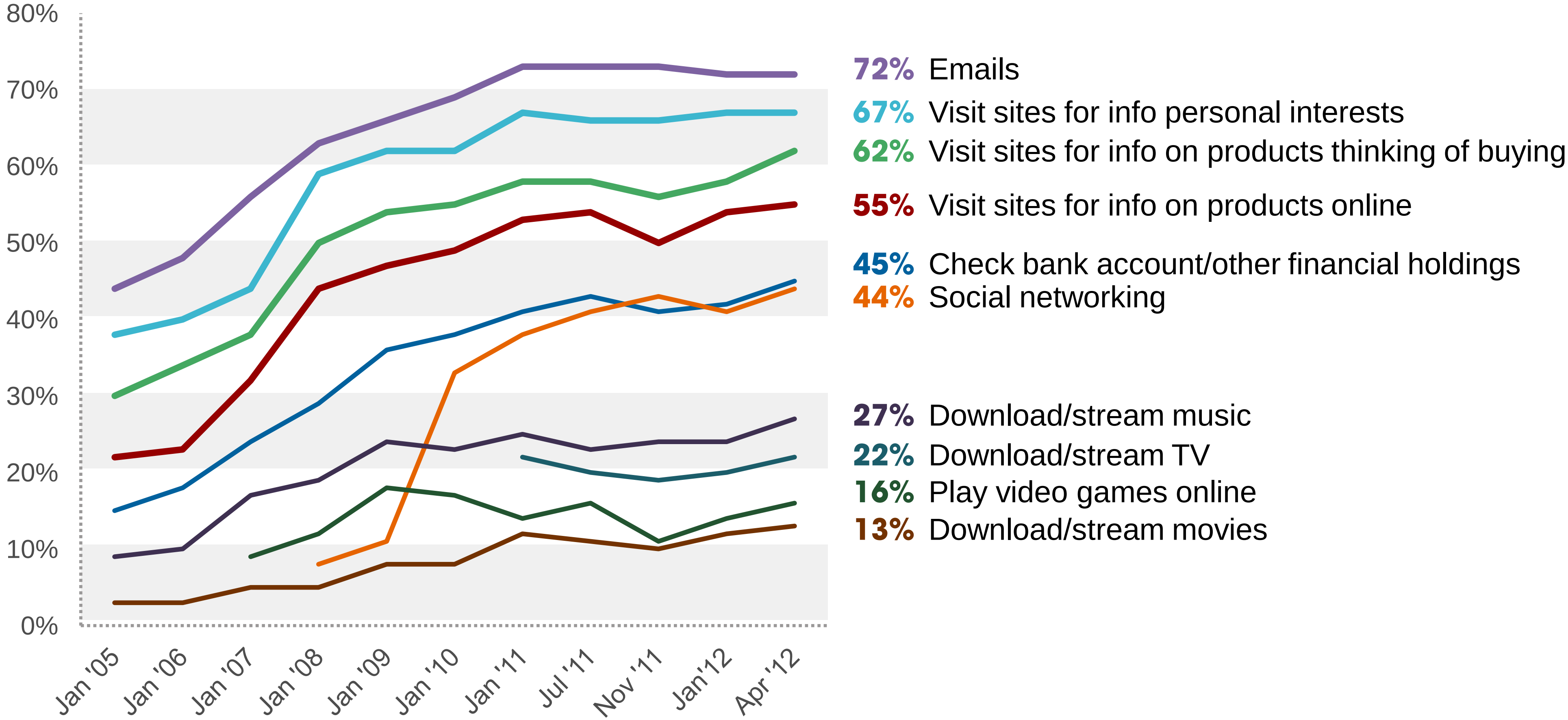


: Base: 971 GB adults aged 15+: April 2012

Source: Ipsos MORI

CHANGING WAYS THE INTERNET IS USED

WHICH OF THE FOLLOWING APPLIES TO YOU?



: Base: circa 2,000 interviews per wave until January 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?

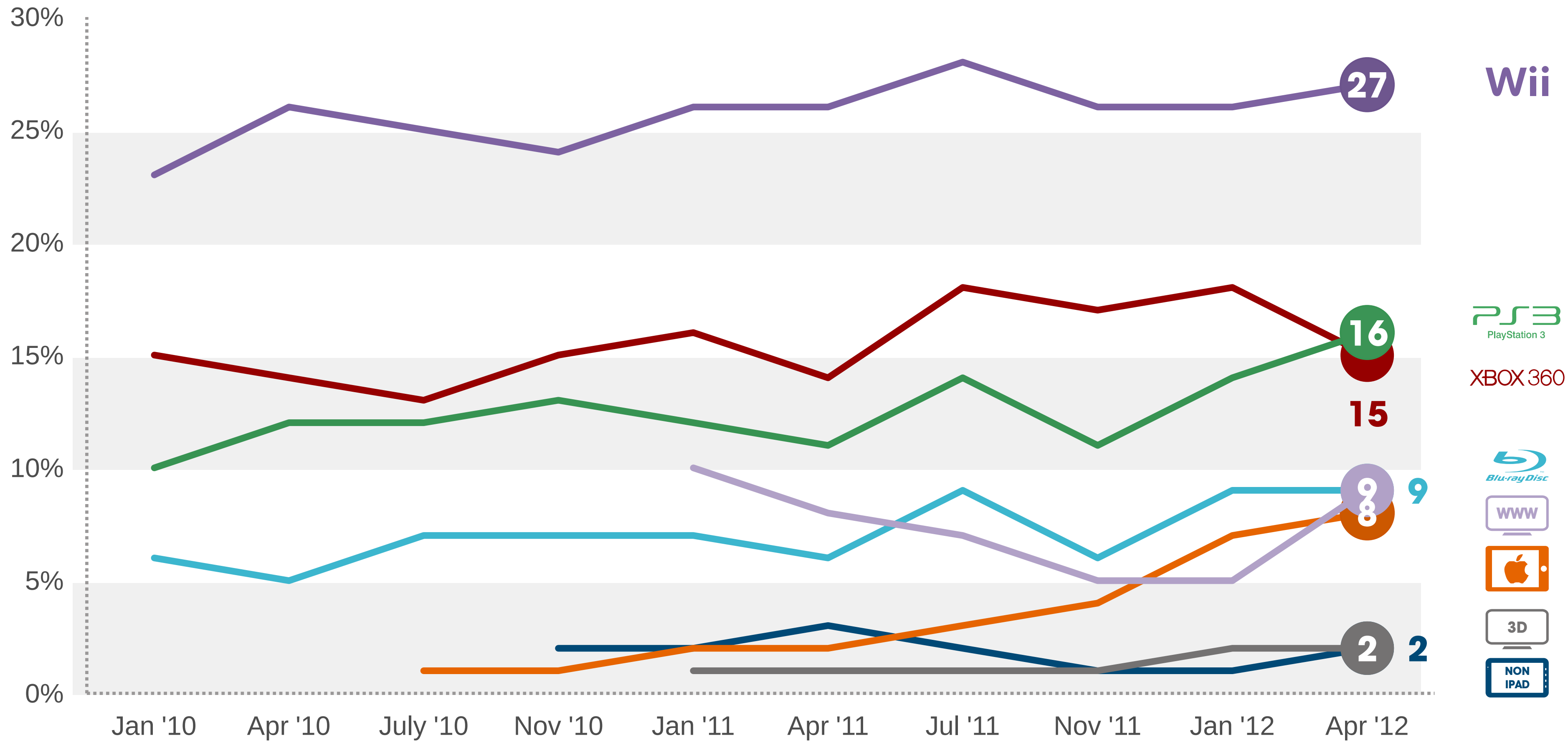
		APR '11
Personal computer OR Laptop	79%	81%
Laptop	61%	59%
DVD player	63%	70%
DVD recorder	23%	33%
Personal video recorder (PVR)	29%	32%
Blu-ray player (excl. PS3)	9%	6%
Digital TV via aerial/Freeview	51%	48%
Satellite TV	38%	41%
Cable TV	19%	17%
TV with internet built in	9%	8%
Freesat	5%	4%
3D TV	2%	1%
Latest generation games console	42%	37%
Wii	27%	26%
PS3	16%	11%
Xbox 360	15%	14%
Digital camera (excl. camera in mobile phone)	58%	62%
MP3 portable audio digital player	30%	36%
DAB digital radio	29%	29%
Tablet computer (e.g. iPad, Playbook)	10%	5%
ebook reader	9%	2%

: Base: 971 GB adults aged 15+: April 2012

Source: Ipsos MORI

TRENDS IN EQUIPMENT OWNERSHIP IN THE HOME

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

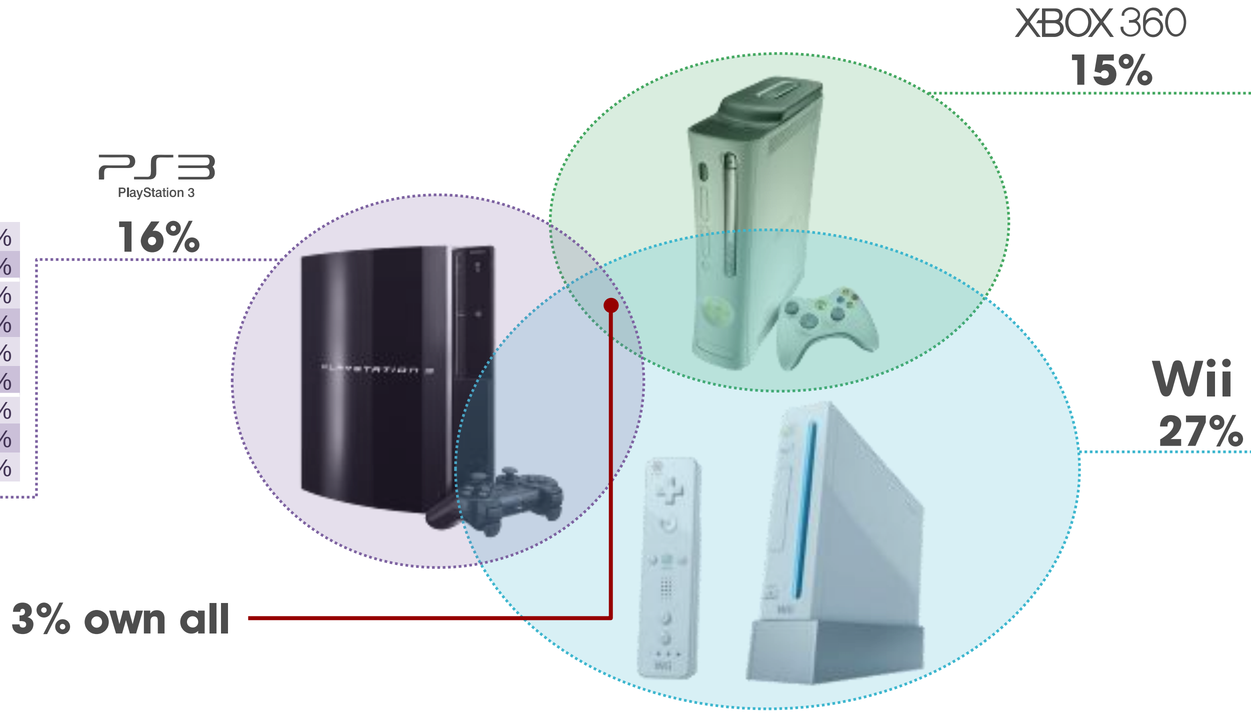


Base: circa 1,000 GB adults aged 15+ per wave

Source: Ipsos MORI

CONSOLES OWNED IN THE HOME

CONSOLE IN THE HOUSEHOLD – APRIL 2012 (42% OWN ANY LATEST GENERATION)



PS3 – 16%

Male	19%
Females	13%
15-34	28%
35-44	18%
45-54	19%
55+	3%
Children <10	20%
Aged 10-15	30%
No Children	12%

XBOX 360 – 15%

Male	17%
Females	13%
15-34	22%
35-44	24%
45-54	19%
55+	2%
Children <10	26%
Aged 10-15	37%
No Children	9%

Wii – 27%

Male	26%
Females	27%
15-34	30%
35-44	43%
45-54	31%
55+	13%
Children <10	47%
Aged 10-15	54%
No Children	16%

42% of GB adults have at least one of the latest generation games consoles in their household.

The Wii leads the market with 27% ownership, with PlayStation 3 (PS3) and Xbox 360 at around half that level.

3% of GB adults own all three latest consoles (Wii, Xbox 360 and PS3).

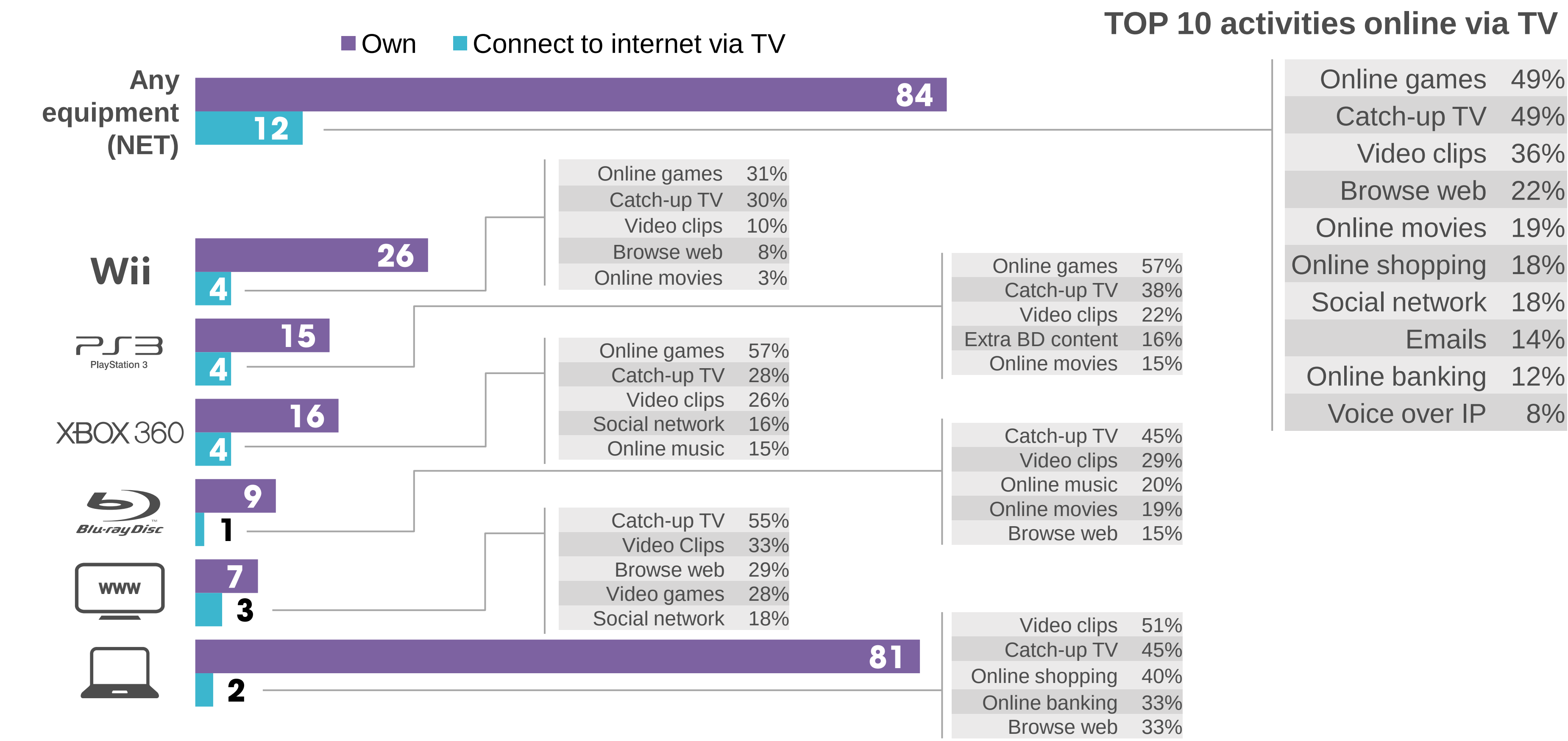
Base: 971 GB adults aged 15+: April 2012

Source: Ipsos MORI

ACCESSING THE INTERNET VIA A TV

% USING EQUIPMENT TO ACCESS THE INTERNET VIA TV

Around 1 in 8 (12%) access the internet via a TV - in most cases this is via a games console linked to a TV. Connected TV online activities focus on gaming, catch-up TV and accessing video clips.



Base: 1,957 GB adults aged 15+: January/April 2012 * Blu-ray based on July/November 2011/January/April 2012

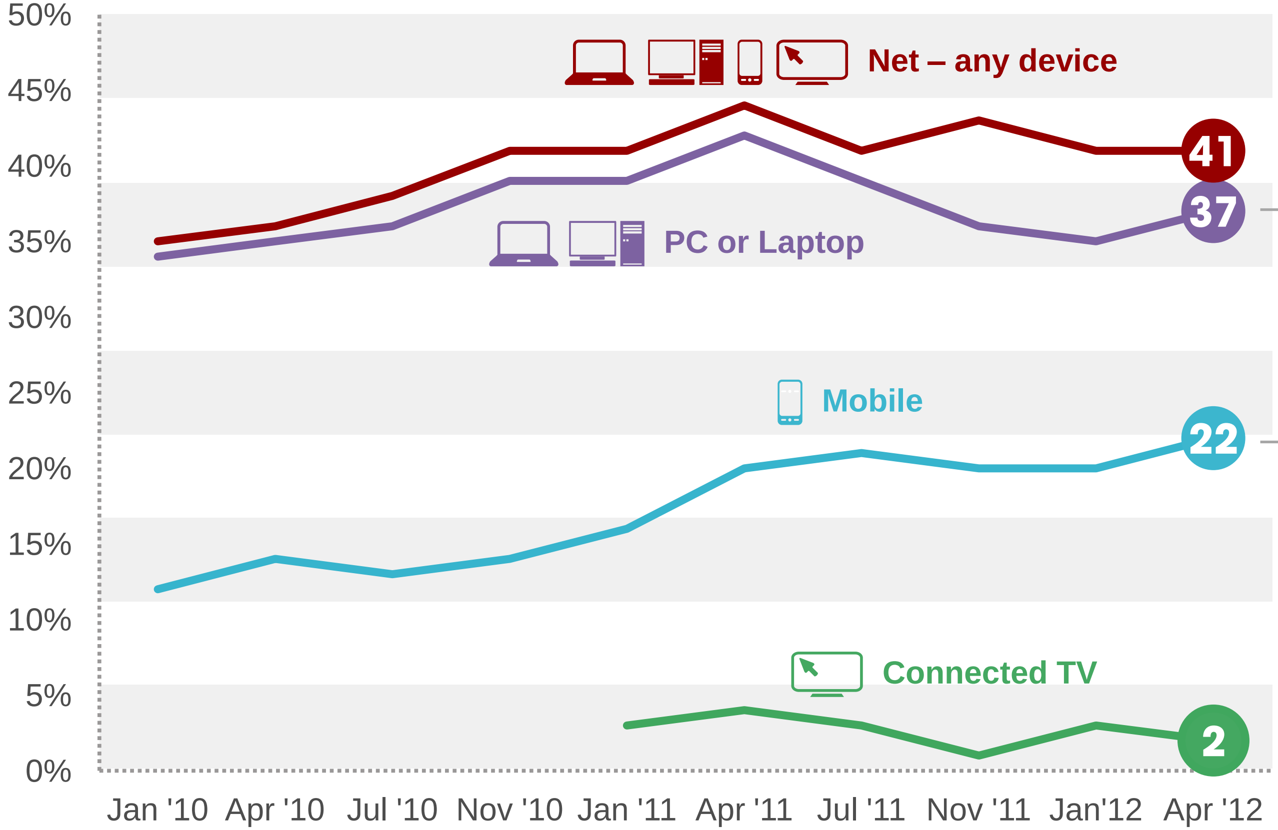
Source: Ipsos MORI

SOCIAL NETWORKING

TRENDS IN VISITING SOCIAL NETWORKING SITES

VISITING SOCIAL NETWORK SITES ON PC/LAPTOP VS. MOBILE IN THE LAST 12 MONTHS

PC/laptop is the main access method for social networking although the gap is closing with 22% accessing social networks on their mobile. Only 2% access social networking via a TV connected to the internet.



15-34	61%
35+	26%
Males 15-34	62%
Males 35+	25%
Female 15-34	61%
Females 35+	27%

15-34	45%
35+	11%
Males 15-34	40%
Males 35+	13%
Female 15-34	49%
Females 35+	9%

Base: 971 GB adults aged 15+: April 2012

Source: Ipsos MORI

WHO IS AND ISN'T USING SOCIAL NETWORKING SITES

% VISITING SOCIAL NETWORKS ON PC/LAPTOP BY GENDER AND SOCIAL GRADE IN 2012

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	36	58	56	42	32	21	7
Males AB	40	70	63	52	50	25	12
Males C1	41	62	57	47	31	30	7
Males C2	35	63	60	32	28	19	3
Males DE	26	46	47	24	14	8	2
Females	37	61	58	48	40	22	7
Females AB	44	79	69	58	43	26	10
Females C1	44	68	67	43	51	29	8
Females C2	32	45	54	45	29	13	5
Females DE	28	51	42	41	30	15	5

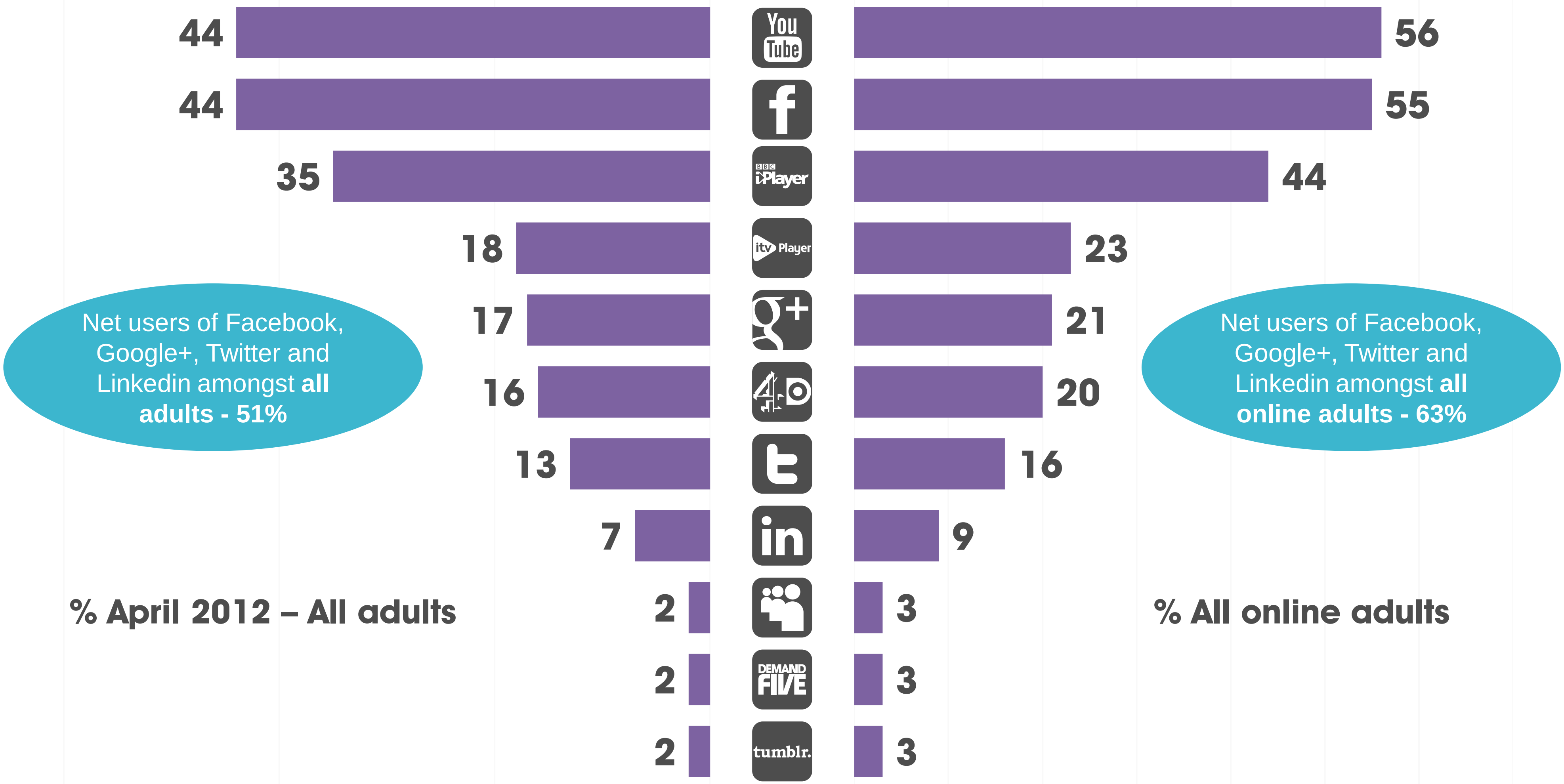
0-49% 50-69% 70-100%

Base: 3,970 GB adults aged 15+: April/July/November 2011/ January 2012

Source: Ipsos MORI

WEBSITES VISITED OR USED IN THE LAST 3 MONTHS

Over 4 in 10 adults have used Facebook (44%) and YouTube (44%) in the past 3 months.
17% have visited or used Google+ (the Google social network site), 13% Twitter and 7% Linkedin.



Base: 971 GB adults aged 15+: April 2012

Base: 725 GB online adults aged 15+: April 2012

Source: Ipsos MORI

PROFILE OF FACEBOOK USERS

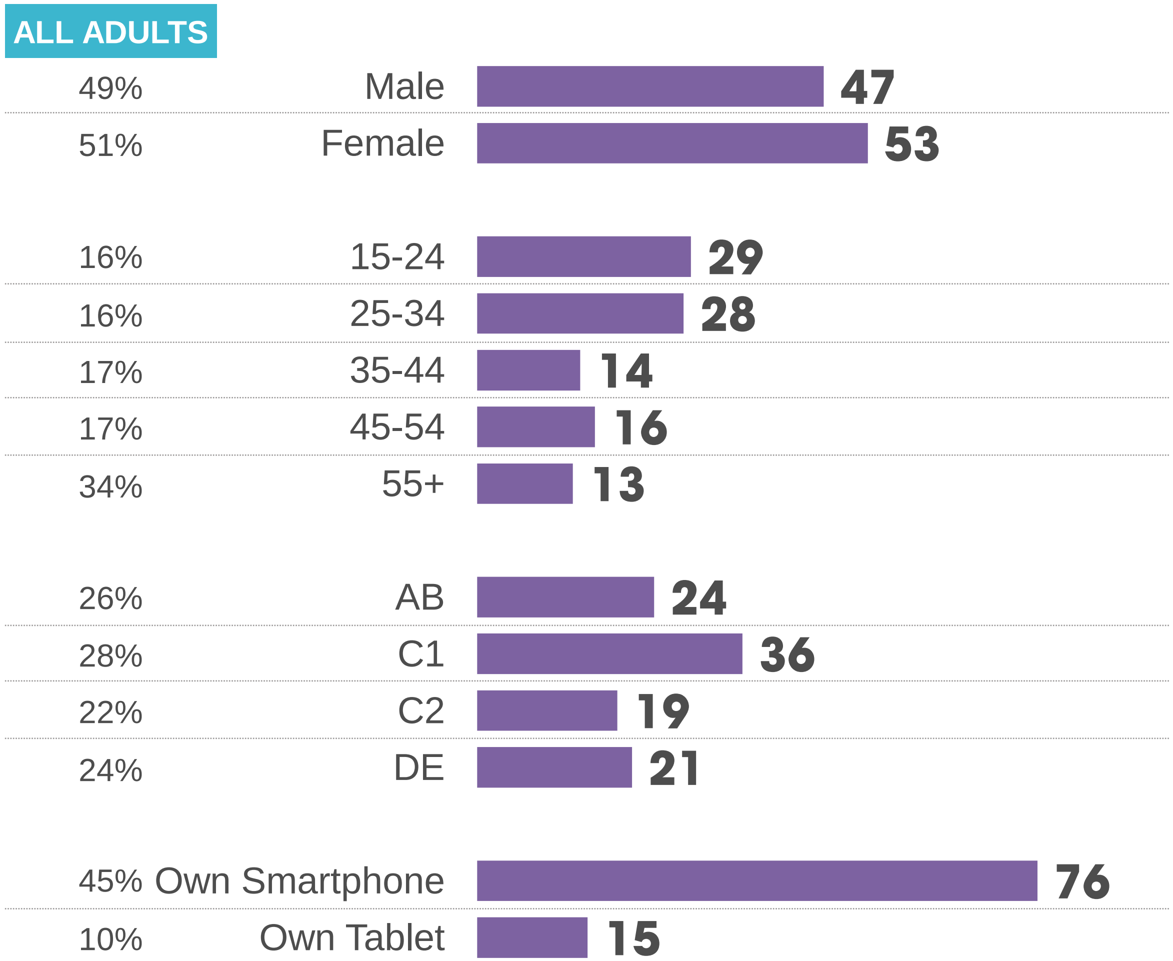
ALL ADULTS		
49%	Male	45
51%	Female	55
16%	15-24	28
16%	25-34	25
17%	35-44	18
17%	45-54	19
34%	55+	11
26%	AB	28
28%	C1	34
22%	C2	18
24%	DE	20
45%	Own Smartphone	69
10%	Own Tablet	17

The profile of Facebook users when compared to the national population is slightly more female with a younger age base.

: All Adults (971) / All visiting / using Facebook (403) in last 3 months: April 2012

Source: Ipsos MORI

PROFILE OF GOOGLE+ USERS



Demographic profile for Google+ users is quite similar to Facebook users with 3 in 10 aged under 25.

3 out of 4 Google+ users have a smartphone.

: Base: All Adults (971) / All visiting / using Google+ (158) in last 3 months: April 2012

Source: Ipsos MORI

PROFILE OF TWITTER USERS

ALL ADULTS		
49%	Male	49
51%	Female	51
16%	15-24	40
16%	25-34	28
17%	35-44	17
17%	45-54	11
34%	55+	3
26%	AB	24
28%	C1	45
22%	C2	17
24%	DE	14
45%	Own Smartphone	82
10%	Own Tablet	22

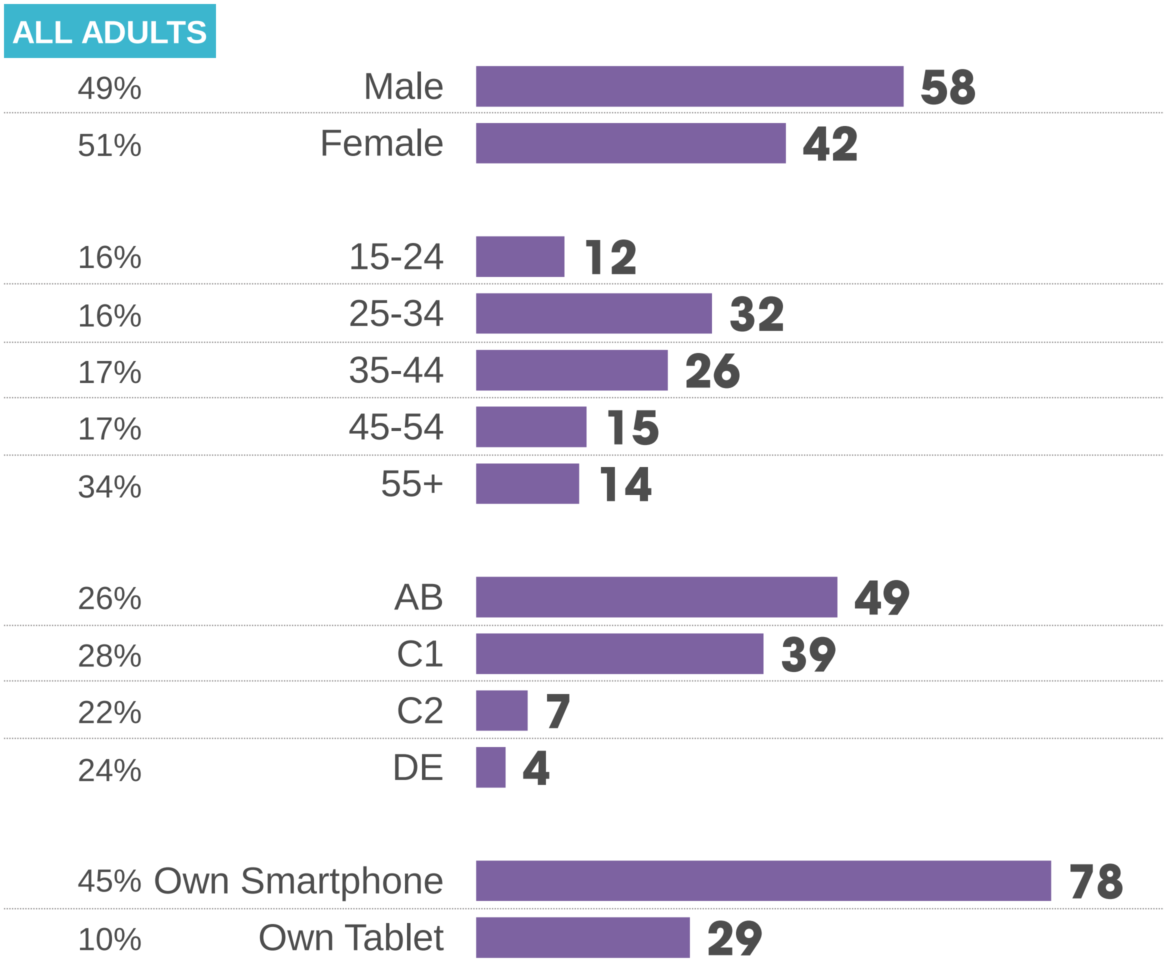
Twitter users are young: two thirds of them are aged under 35.

They are also more likely to be C1 social grade and very mobile: 82% of then own a smartphone, 22% a tablet.

: Base: All Adults (971) / All visiting / using Twitter (122) in last 3 months: April 2012

Source: Ipsos MORI

PROFILE OF LINKEDIN USERS



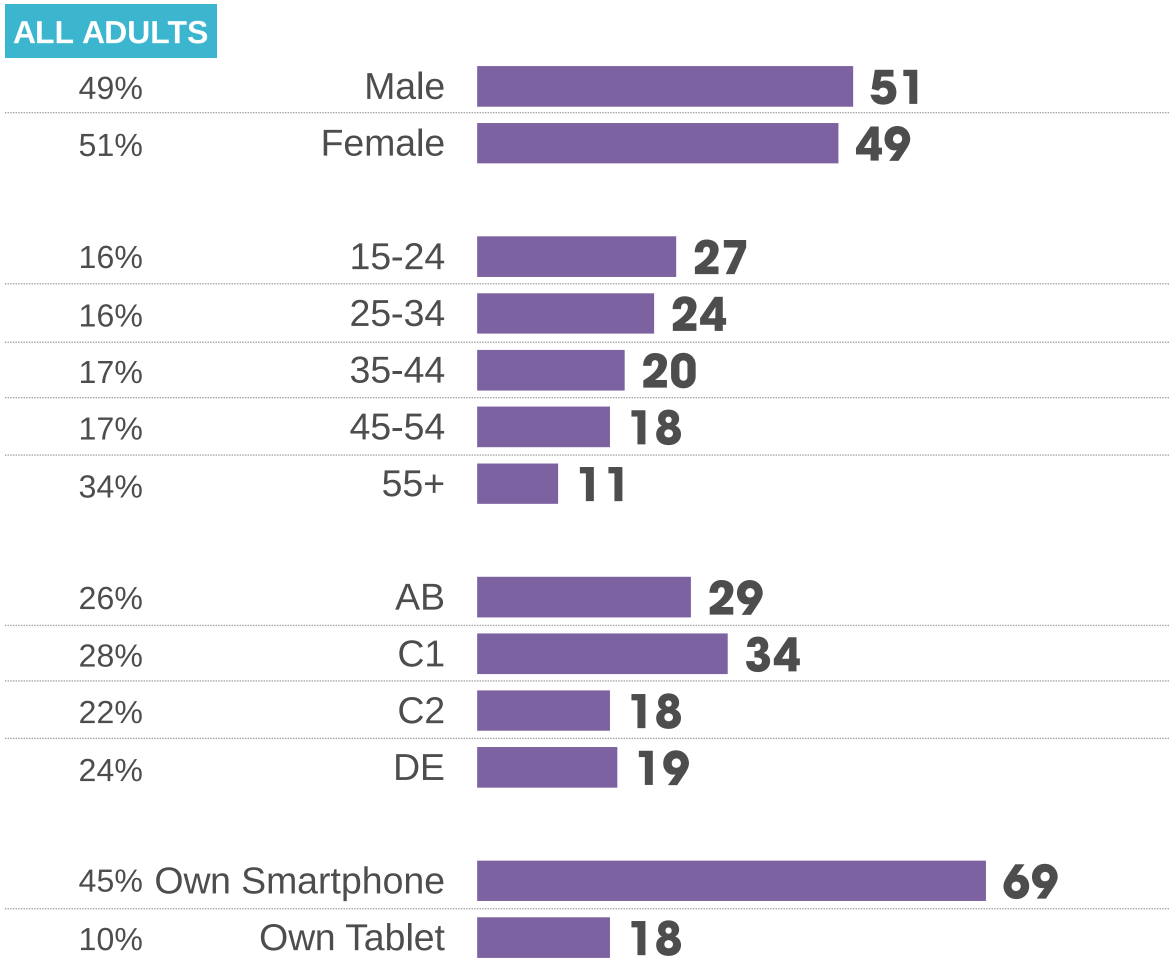
Linkedin is a more specific social network: its users skew towards males (58%), are much older than on other networks (4 in 10 are between 35 and 54) and half are social grade AB.

Consequently, the ownership level for tablets is three times higher than the country average.

: Base: All Adults (971) / All visiting / using Linkedin (59) in last 3 months: April 2012

Source: Ipsos MORI

PROFILE OF YOUTUBE USERS



YouTube users are equally spread between male and female and half of them are aged under 35.

Ownership levels of smartphones and tablets are high amongst this group.

: Base: All Adults (971) / All visiting / using YouTube (400) in last 3 months: April 2012

Source: Ipsos MORI

DEVICES USED TO ACCESS FACEBOOK, GOOGLE+, TWITTER AND LINKEDIN

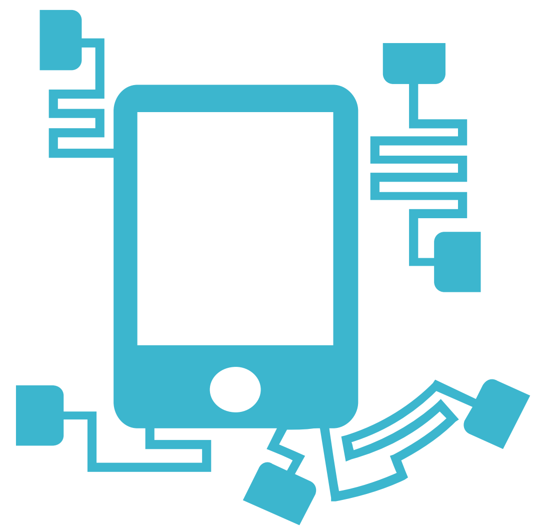
% Amongst users/ visitors in last 3 months… / % Amongst all adults…

	Facebook	Google+	Twitter	LinkedIn
% PC\Laptop	87 / 38	78 / 13	68 / 9	88 / 6
% Mobile	51 / 22	39 / 7	65 / 8	33 / 2
% Tablet	10 / 4	11 / 2	13 / 2	7 / 1
% TV	3 / 1	5 / 1	1 / 0	2 / 0
% Games Console	2 / 1	4 / 1	1 / 0	0 / 0

% Amongst all adults… Base: 971 GB adults aged 15+: April 2012
% Amongst users/ visitors in last 3 months… Base: Facebook (403) Google+ (158) Twitter (122) LinkedIn (59): April 2012

Source: Ipsos MORI

SMARTPHONE / TABLET OWNERSHIP

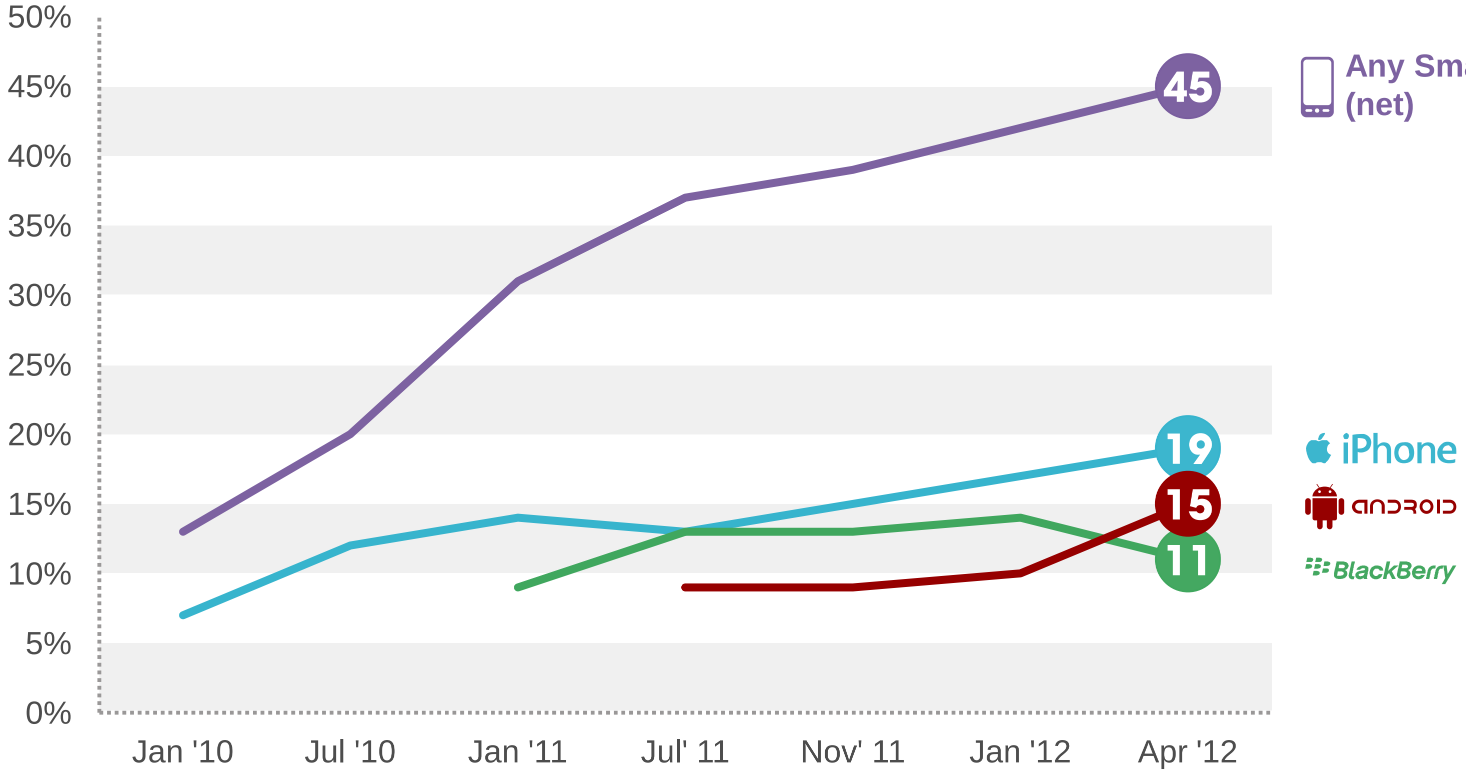


DEVICES OWNED - GROWTH IN SMARTPHONES

BLACKBERRY VS. IPHONE VS. ANDROID OWNERSHIP

Smartphone ownership has risen to 45%, with 19% owning an iPhone, 15% owning an Android smartphone and 11% owning a BlackBerry.

iPhone ownership is highest amongst those aged 15-34 at 32%; 1 in 4 males aged 15-34 own an Android smartphone and just under 1 in 4 females aged 15-34 own a BlackBerry.



iPhone	
Males 15-34	32%
Males 35+	16%
Female 15-34	32%
Females 35+	11%

Android	
Males 15-34	26%
Males 35+	14%
Female 15-34	20%
Females 35+	8%

BlackBerry	
Males 15-34	14%
Males 35+	7%
Female 15-34	23%
Females 35+	7%

Base: 971 GB adults aged 15+: April 2012

Source: Ipsos MORI

WHO OWNS A SMARTPHONE

% OWN A SMARTPHONE BY GENDER AND SOCIAL GRADE ACROSS 2011/2012

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	46	67	67	59	42	29	9
Males AB	55	84	67	79	66	44	14
Males C1	49	67	76	55	34	35	12
Males C2	44	72	80	51	34	18	2
Males DE	31	57	47	30	25	7	4
Females	36	71	65	43	32	17	2
Females AB	43	79	79	55	45	21	4
Females C1	43	81	68	43	42	20	5
Females C2	33	65	58	32	26	14	2
Females DE	25	59	55	31	11	10	-

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

Base: 3,970 GB adults aged 15+: July/November 2011/ January/ April 2012

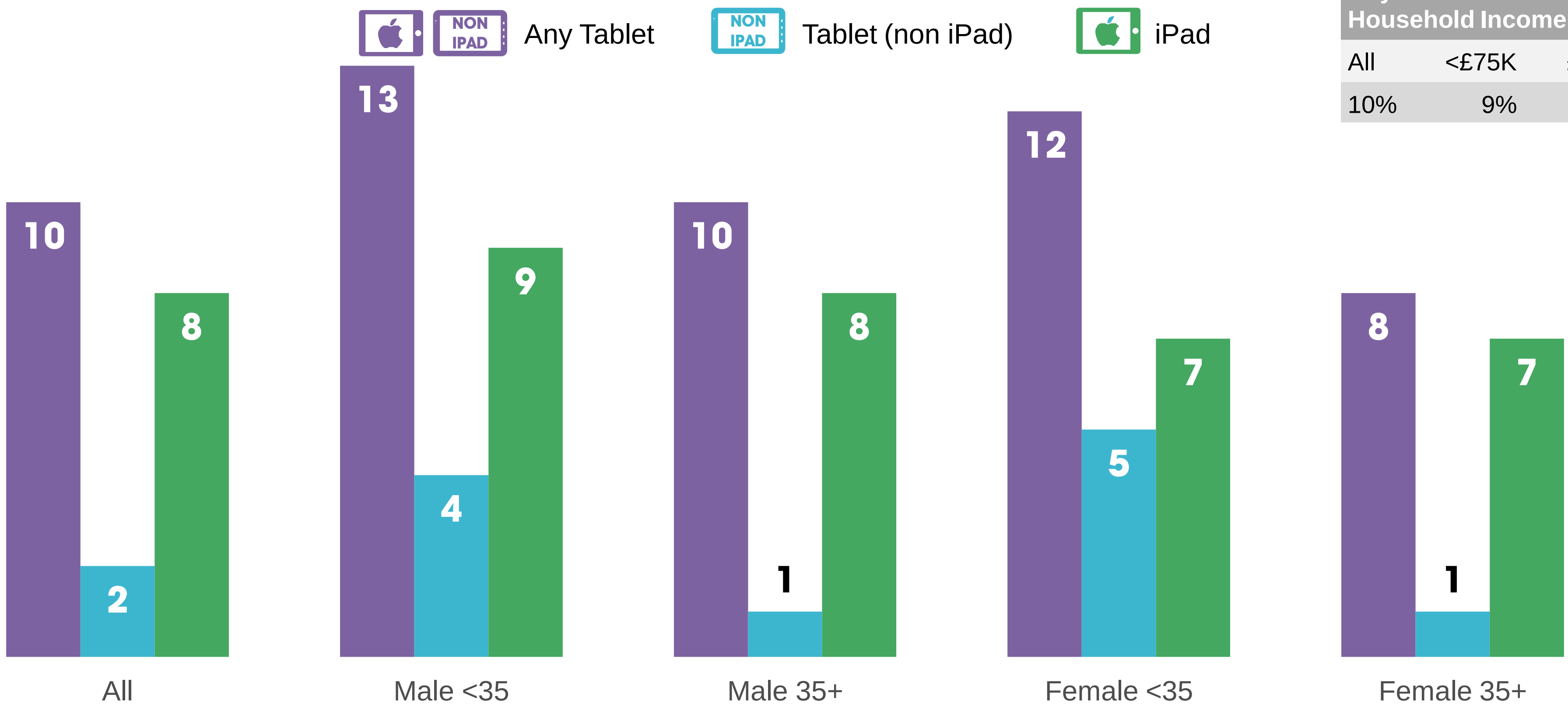
Source: Ipsos MORI

DEVICES OWNED - EMERGING TABLET MARKET

IPAD AND OTHER TABLETS

The tablet market remains 'niche' with just 10% of the adult population owning one. However, iPad ownership is increasing and it is by far the most popular tablet amongst all demographics. Ownership of any tablet is highest amongst males under 35 at 13%.

Any tablet ownership Household Income		
All	<£75K	£75K+
10%	9%	47%



Base: 971 GB adults aged 15+: April 2012

Source: Ipsos MORI

HOW WE CONSUME CONTENT - MUSIC/GAMES

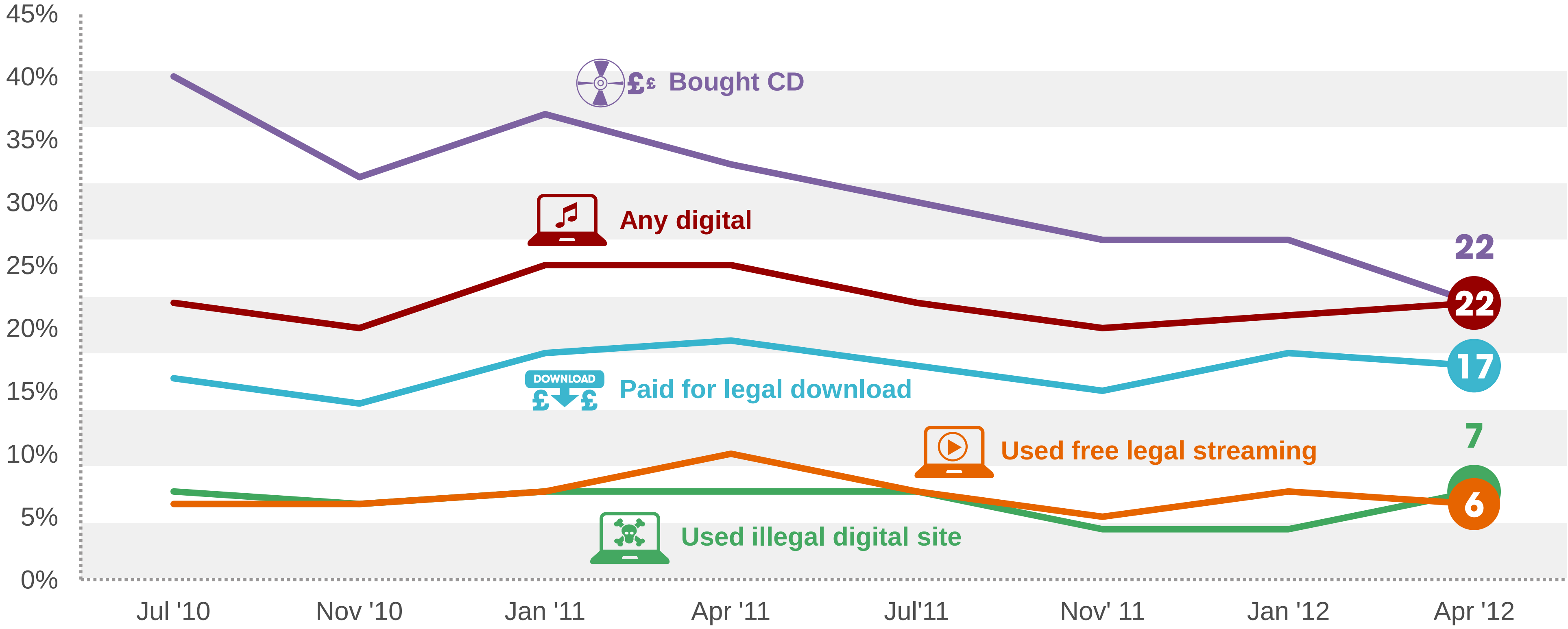
HOW WE CONSUME MUSIC

ACTIVITIES IN THE LAST 12 MONTHS (ALL ADULTS)

Over the past year the proportion of adults paying for CDs has fallen significantly down to 22%.

Paid for legal download is largely unchanged quarter-on-quarter.

Usage of illegal digital sites has increased in the last quarter to 7% of all adults in GB.



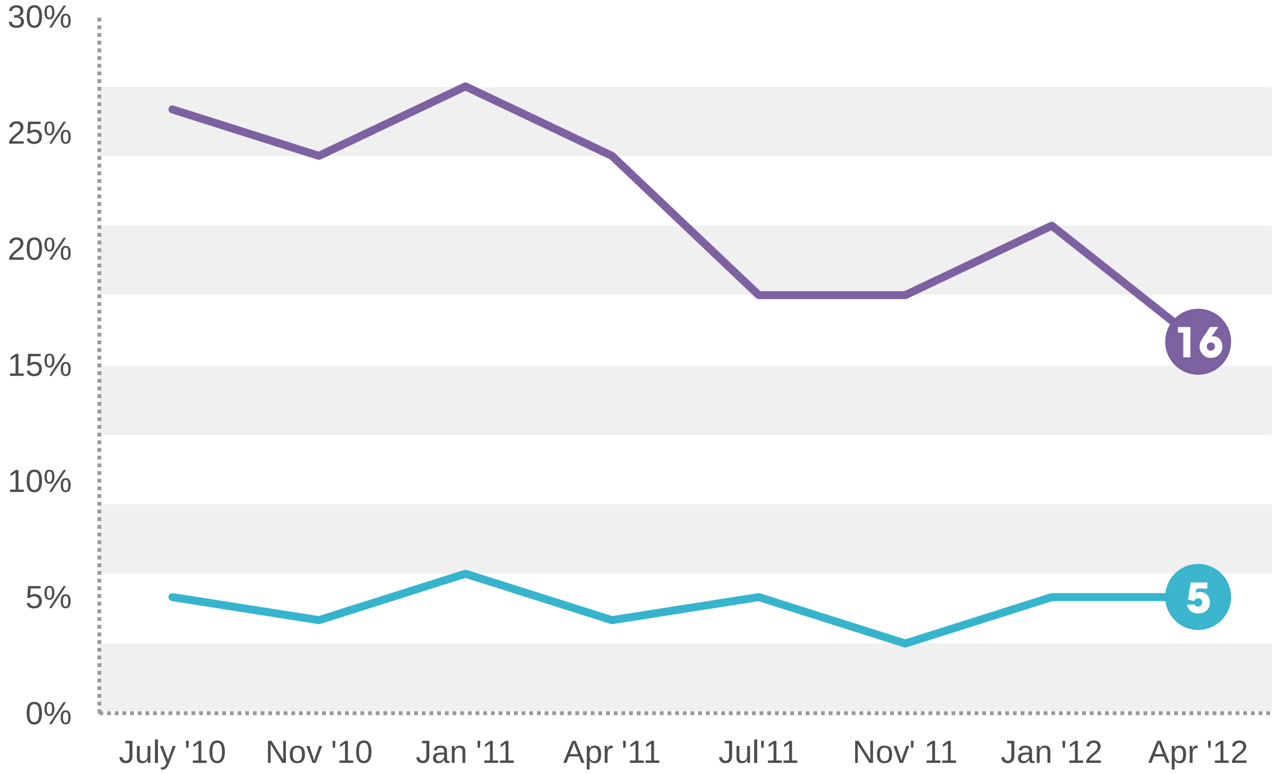
Base: circa 1,000 GB adults aged 15+ per wave

Source: Ipsos MORI

HOW WE CONSUME GAMES FOR CONSOLES

ACTIVITIES IN THE LAST 12 MONTHS (ALL ADULTS)

The number of adults who have bought a game on disc for a games console in the last 12 months has decreased quarter-on-quarter to 16%; only 5% have downloaded a game over the internet, direct to a console. 1 in 5 PS3 owners have paid to download a game directly to a console in the past 12 months, double that of Wii owners.



Bought a game on a disc for console

PS3 owners	38%
Xbox 360 owners	38%
Wii owners	35%

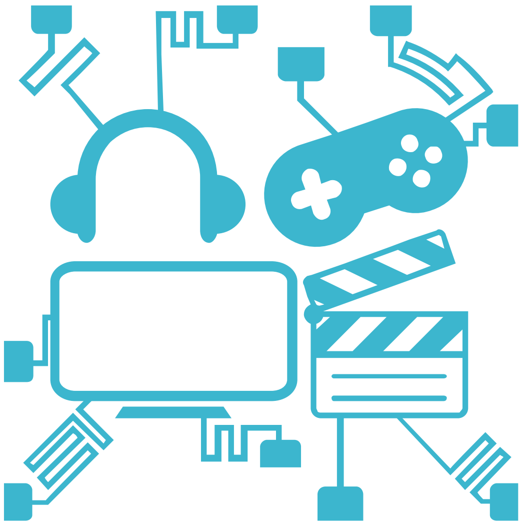
Paid to download a game direct to console

PS3 owners	20%
Xbox 360 owners	13%
Wii owners	10%

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

Source: Ipsos MORI

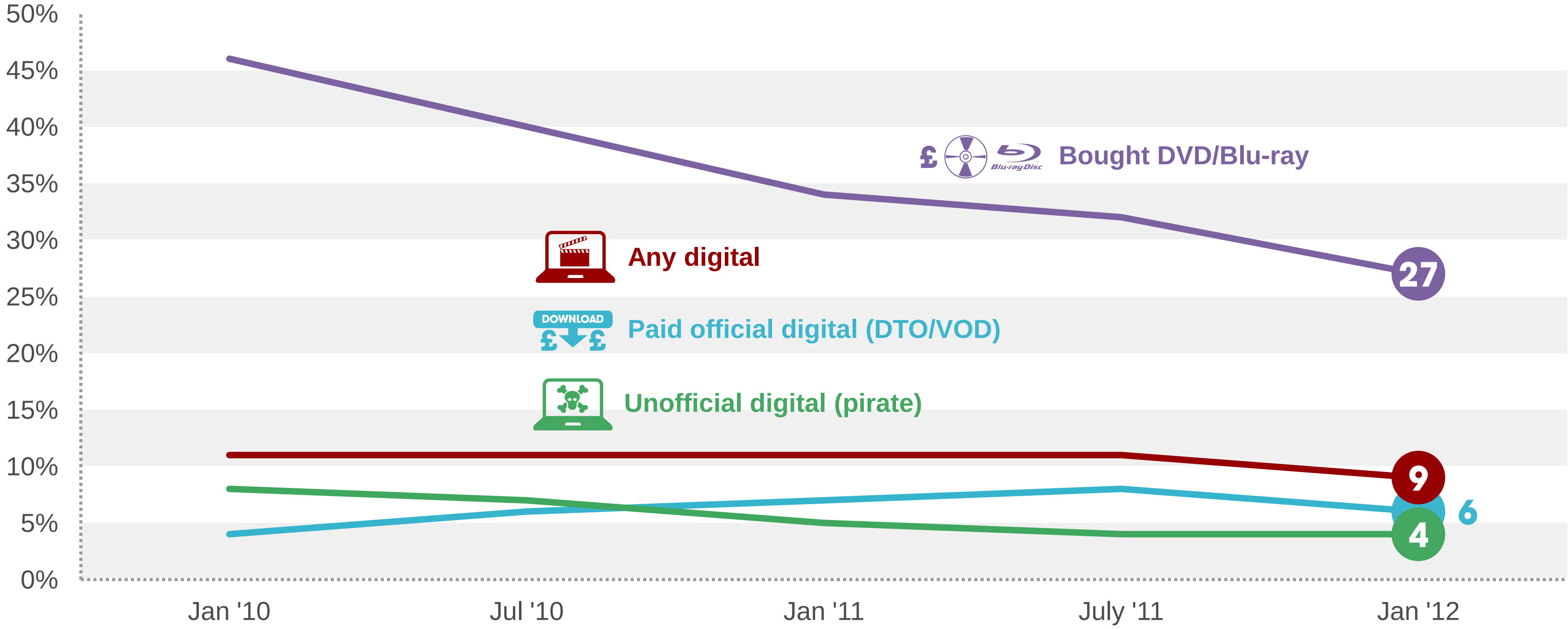
HOW WE CONSUME CONTENT - MOVIES/TV



HOW WE ACCESS MOVIES

MOVIE CONSUMPTION IN THE LAST 12 MONTHS

Like the rest of physical media, physical disc (DVD/BD) movie consumption continues to fall with just over 1 in 4 (27%) buying in the past 12 months. The incidence of adults accessing movies using paid official digital services is low (6%), although it is higher than those who have claimed unofficial access.



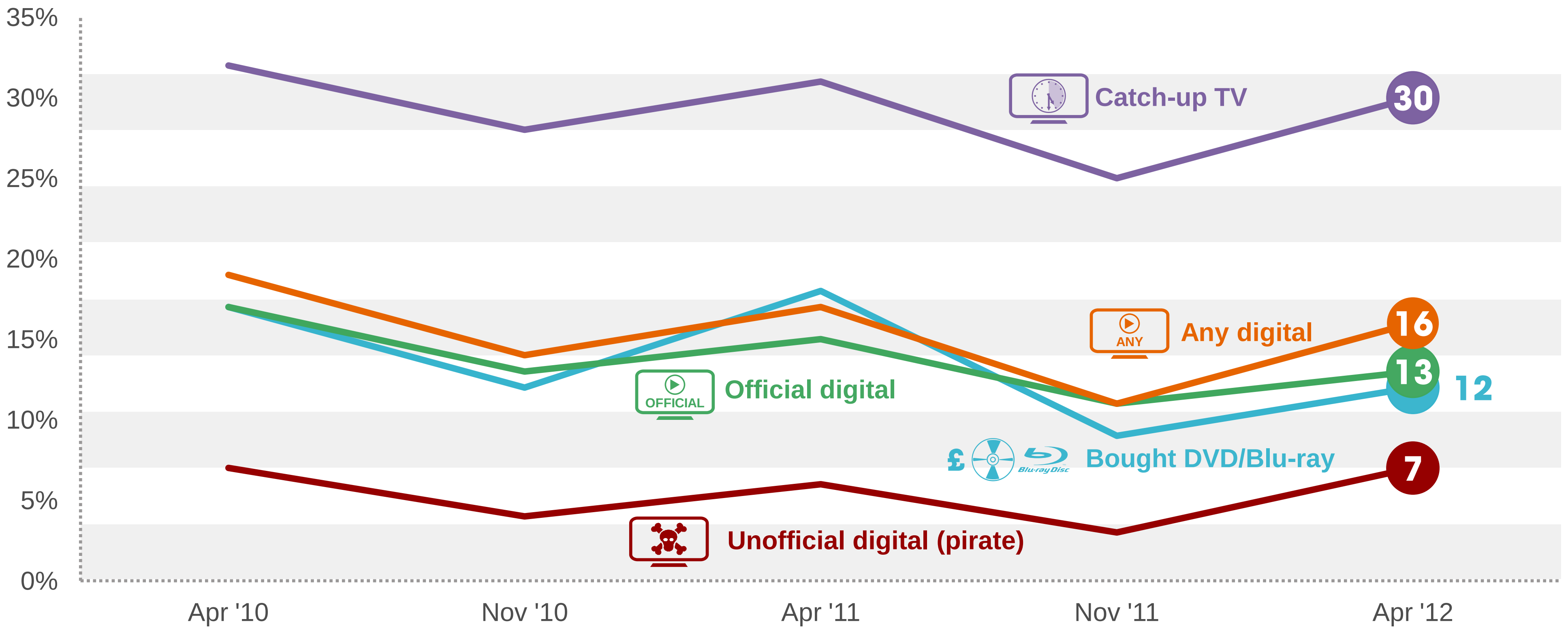
Base: circa 1,000 GB adults aged 15+ per wave

Source: Ipsos MORI

HOW WE ACCESS TV SERIES

TV SERIES CONSUMPTION IN THE LAST 12 MONTHS

Physical disc (DVD/BD) TV series consumption is now at 12% although the decline over the last 2 years has been much less sharp than for movies. The incidence of adults accessing TV series using official digital services (either free streaming from non catch-up sites or paid downloads from official sites) is now at a similar level to physical purchases at 13%.



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

Source: Ipsos MORI

TECH TRACKER TECHNICAL DETAILS

Ipsos MORI interviewed a quota sample of **971 adults aged 15+ in GB.**

The latest interviews were carried out face to face **27th April – 3rd May 2012.**

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 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, content owner studios, 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”