Ipsos MediaCT
The Media, Content and Technology Research Specialists

Ipsos

TECH TRACKER

QUARTERLY RELEASE: Q3 2012

Technology Tracker

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

GB FACE TO FACE SURVEY

LATEST WAVE
QUARTER 3 2012

REPRESENTATIVE SAMPLE OF
1,007 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 at 83% with 44% now accessing via a mobile.

The top activities online remain: accessing email (78%), browsing for information on hobbies (68%), researching products and services (63%) and online shopping (55%).

Connected home

The proportion of adults accessing the internet via a TV is at 17%, with most using a games console connected to TV.

40% of GB adults have at least one of the latest generation games consoles in their household. The Wii leads the market with 26% ownership, with Xbox 360 and PlayStation 3 (PS3) following behind in second and third place.

Social networking

48% access social network sites, nearly half of whom access via a Smartphone. 6% have access via a tablet and 4% access via a TV connected to the internet.

44% of all adults have used Facebook in the past 3 months and 13% have used Google+ (the Google social network site). Usage of Twitter has been steadily rising, currently at 15% of the GB population.

Smartphones

Smartphone ownership has risen to 49%. Ownership of iPhones has gone up to 22% ahead of Android smartphone ownership (15%) and BlackBerry (13%).

iPhone ownership is highest amongst those aged 15-34 at 34%. Among females aged 15-34; ownership figures are iPhone 30%, Android 30%, Blackberry 24%.

Tablets

The tablet market remains ‘niche’ with 11% 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 17%.

Tablets are mobile with more than half using it outside their homes. They are mainly used for emails and social networking.

Music/games & movies/TV

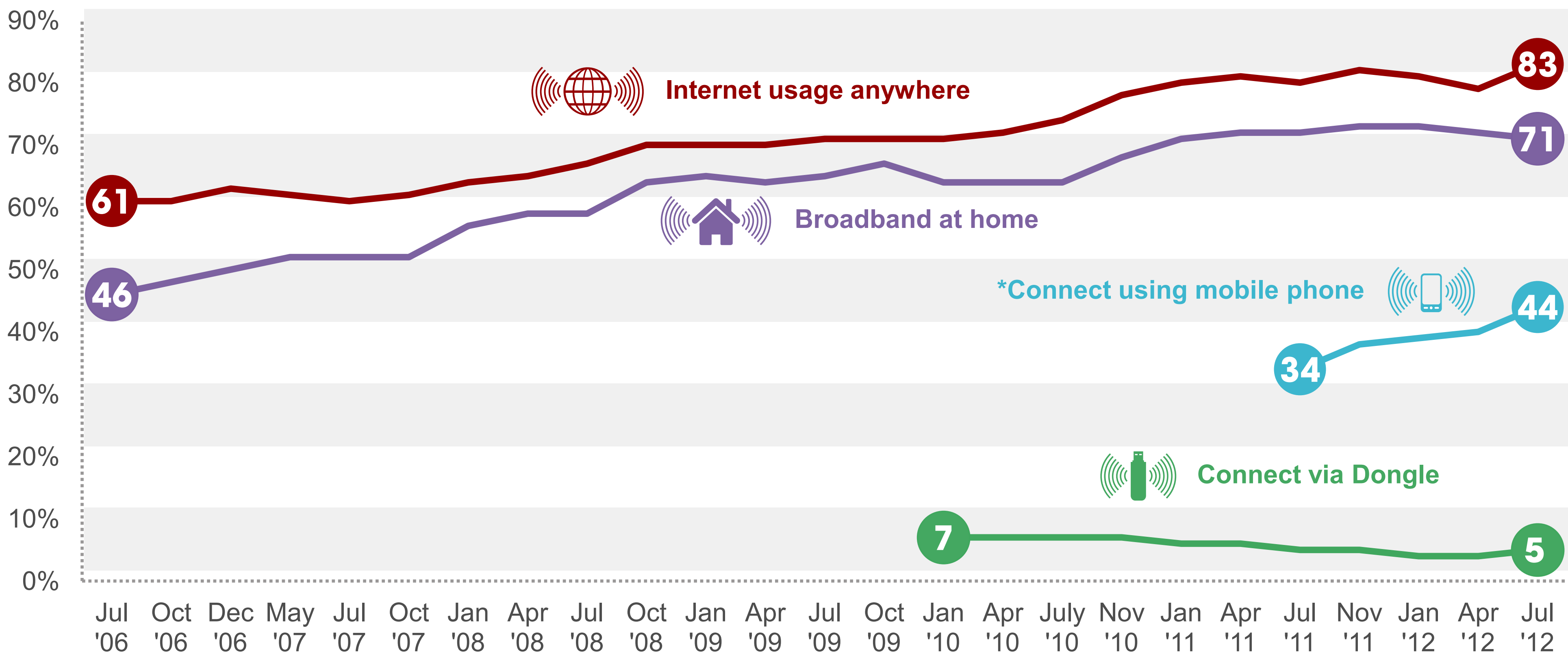
The proportion of adults paying for music CDs and movies/DVD’s /Blu-rays has risen this quarter. The number of adults who have bought a game on disc for a games console in the last 12 months has decreased quarter-on-quarter to 14%; only 6% have paid to download an online game.

INTERNET USAGE

HOW, WHEN, WHERE

INTERNET USAGE TRENDS

WHICH OF THE FOLLOWING APPLIES TO YOU?



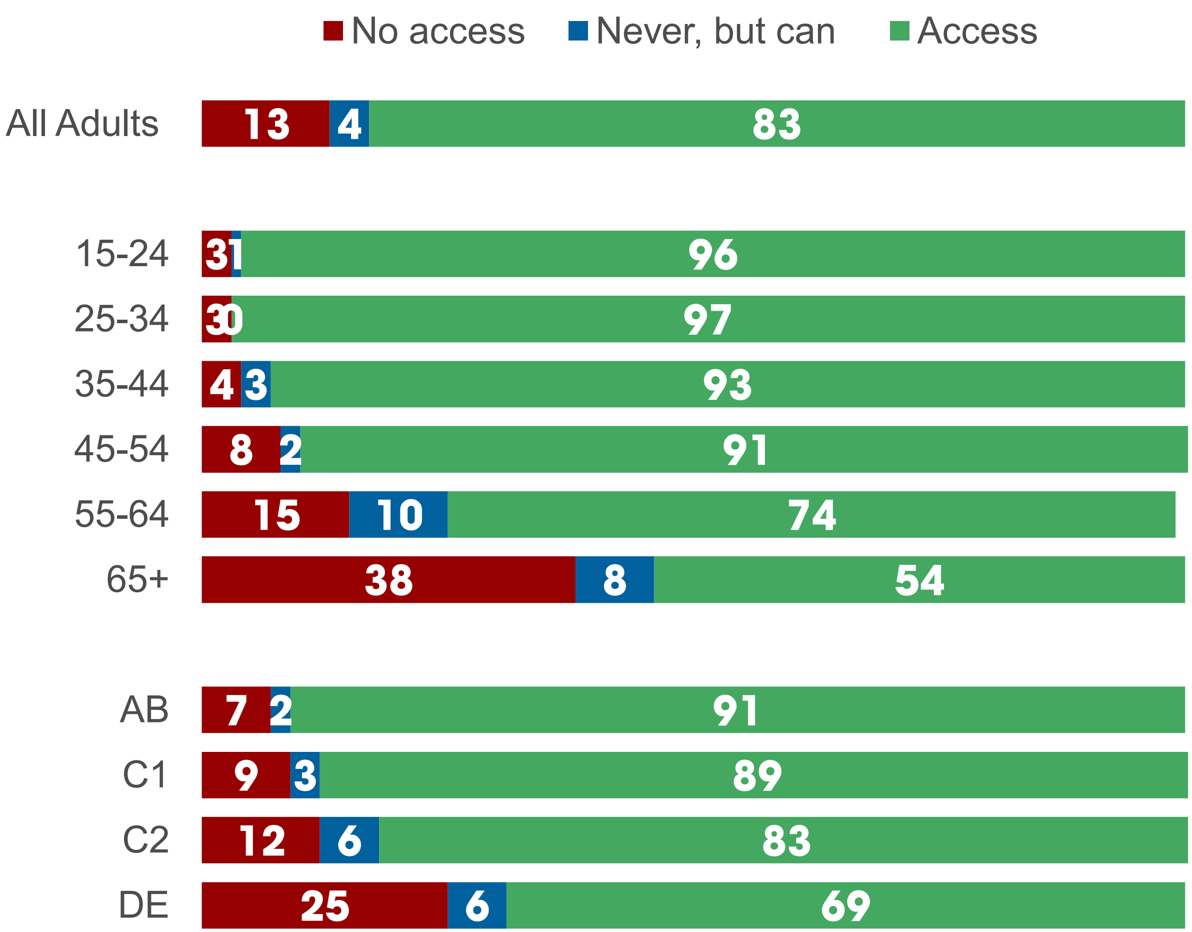
* The wording used for measuring 'internet connection by mobile phone' has been updated which means earlier data is not strictly comparable and is therefore not shown

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

% ACCESS TO THE INTERNET: July 2012



In July 2012, 13% of the GB adult population have no access to the internet in any way.

A further 4% 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 15-34 or AB social grade have access to the web.

Base: 1,007 GB adults aged 15+: July 2012

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	92	94	94	87	78	55
Males AB	94	94	100	100	98	91	83
Males C1	91	96	99	98	93	88	63
Males C2	78	94	95	95	84	73	31
Males DE	66	87	82	73	67	48	24
Females	79	93	95	90	90	77	44
Females AB	93	100	100	99	99	94	71
Females C1	86	97	99	97	95	84	52
Females C2	79	93	94	89	95	64	38
Females DE	59	84	88	68	69	52	21

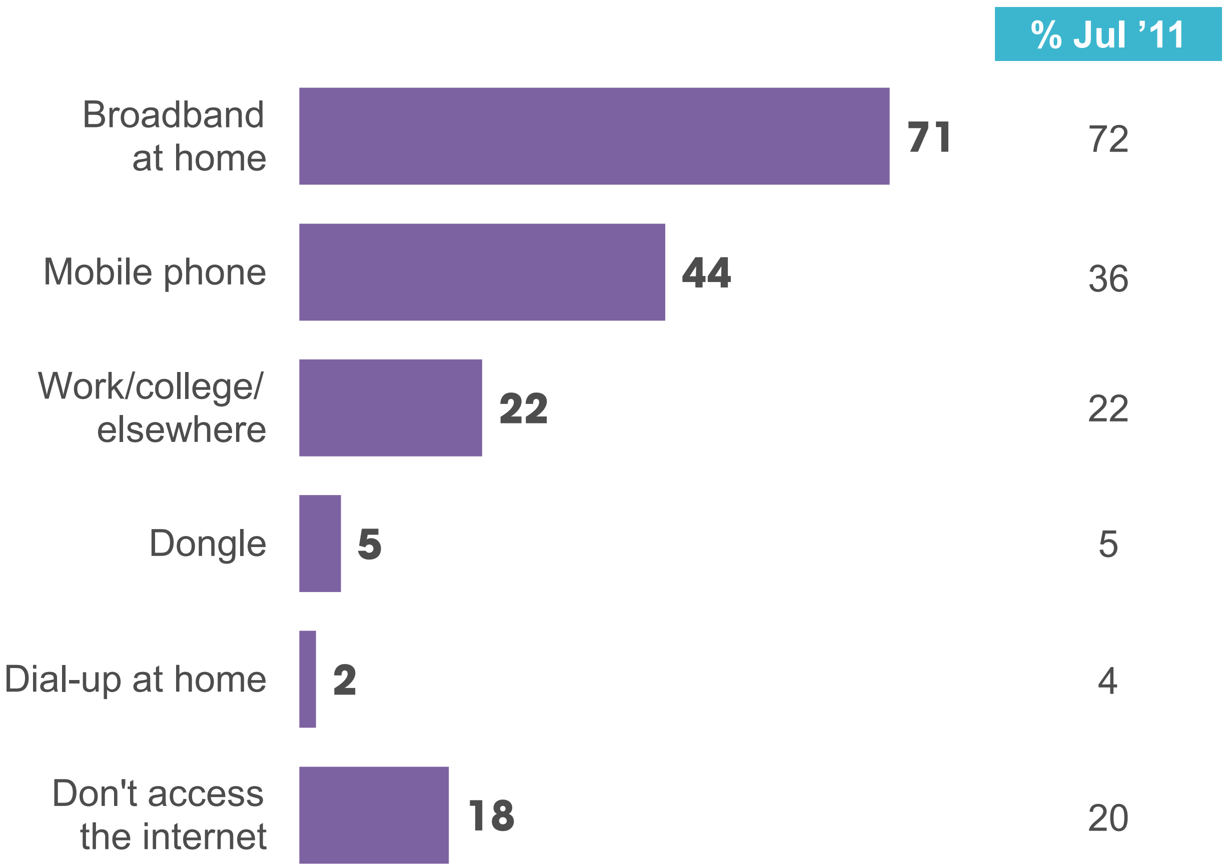
0-49% 50-79% 80-100%

Base: 3,935 GB adults aged 15+: Nov 2011/ Jan/ Apr/Jul 2012

Source: Ipsos MORI

HOW PEOPLE CONNECT TO THE INTERNET

% ACCESS TO THE INTERNET: July 2012



INTERNET GOING MOBILE

In the past year, the proportion of homes accessing the internet via broadband at home has remained at 71%.

44% now access the internet via their mobile phone and only 2% access via dial-up.

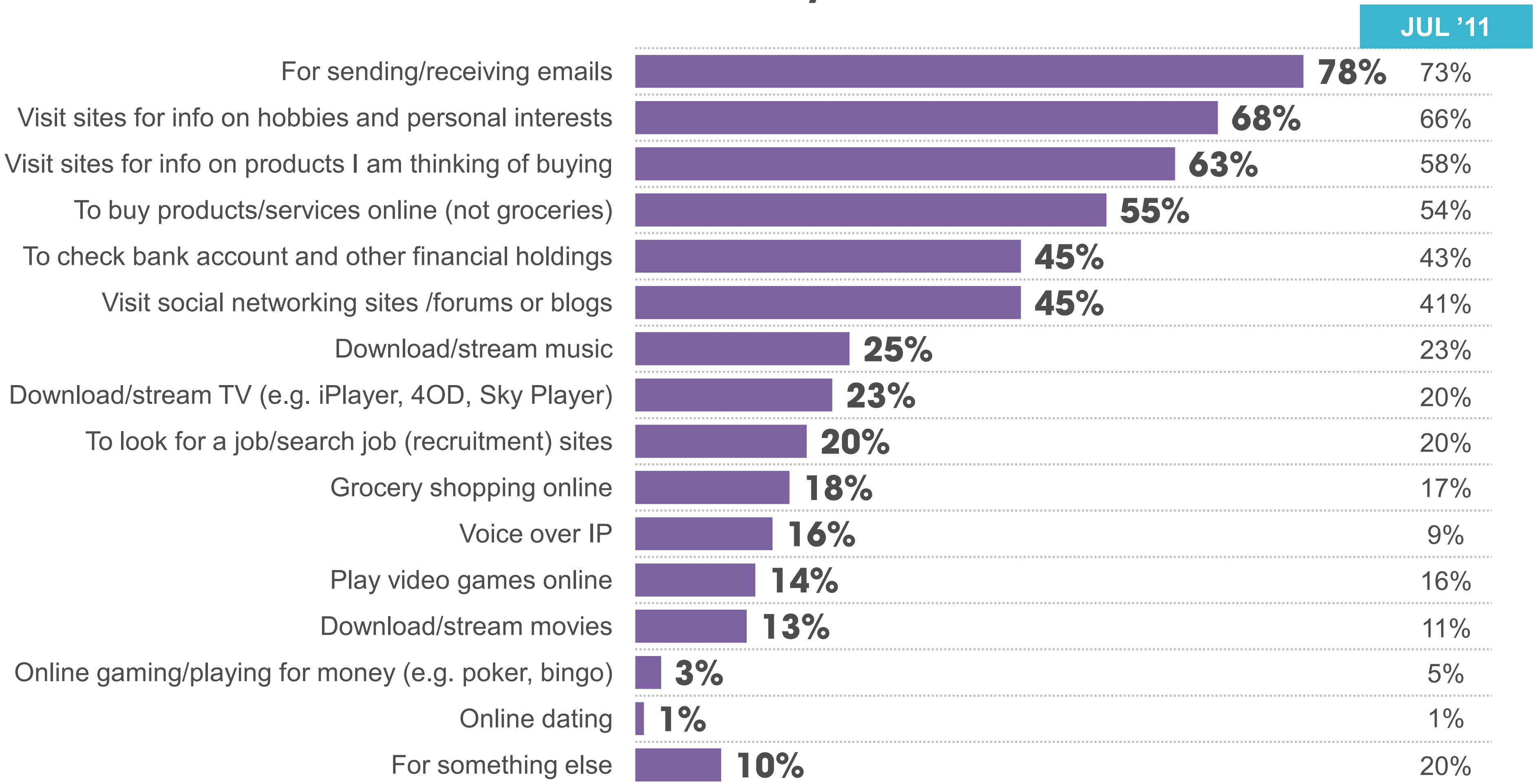
Access via mobile phone has increased year on year.

Base: 1,007 GB adults aged 15+: July 2012

Source: Ipsos MORI

WAYS THE INTERNET IS USED

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

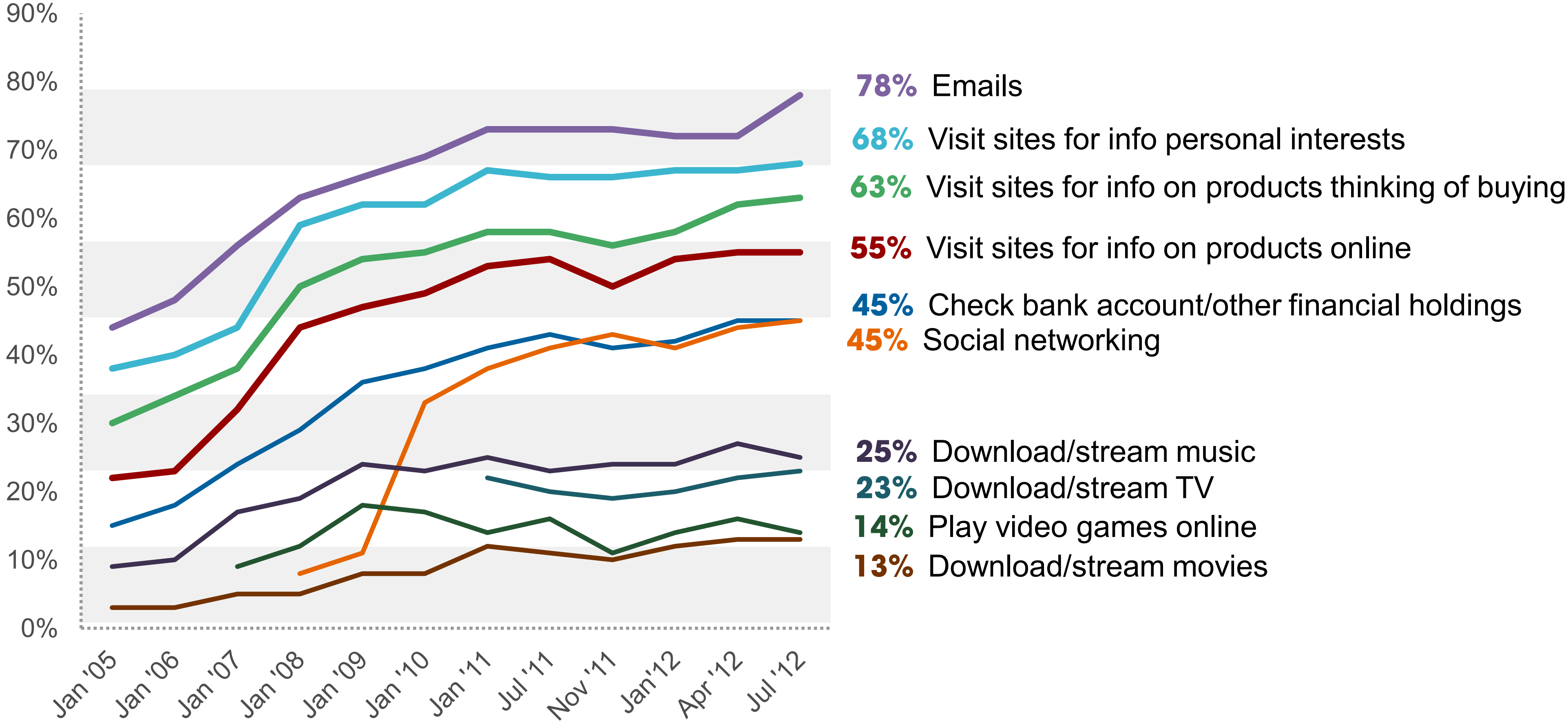


Base: 1,007 GB adults aged 15+: July 2012

Source: Ipsos MORI

CHANGING WAYS THE INTERNET IS USED

USE OF THE INTERNET IN THE PAST 3 MONTHS



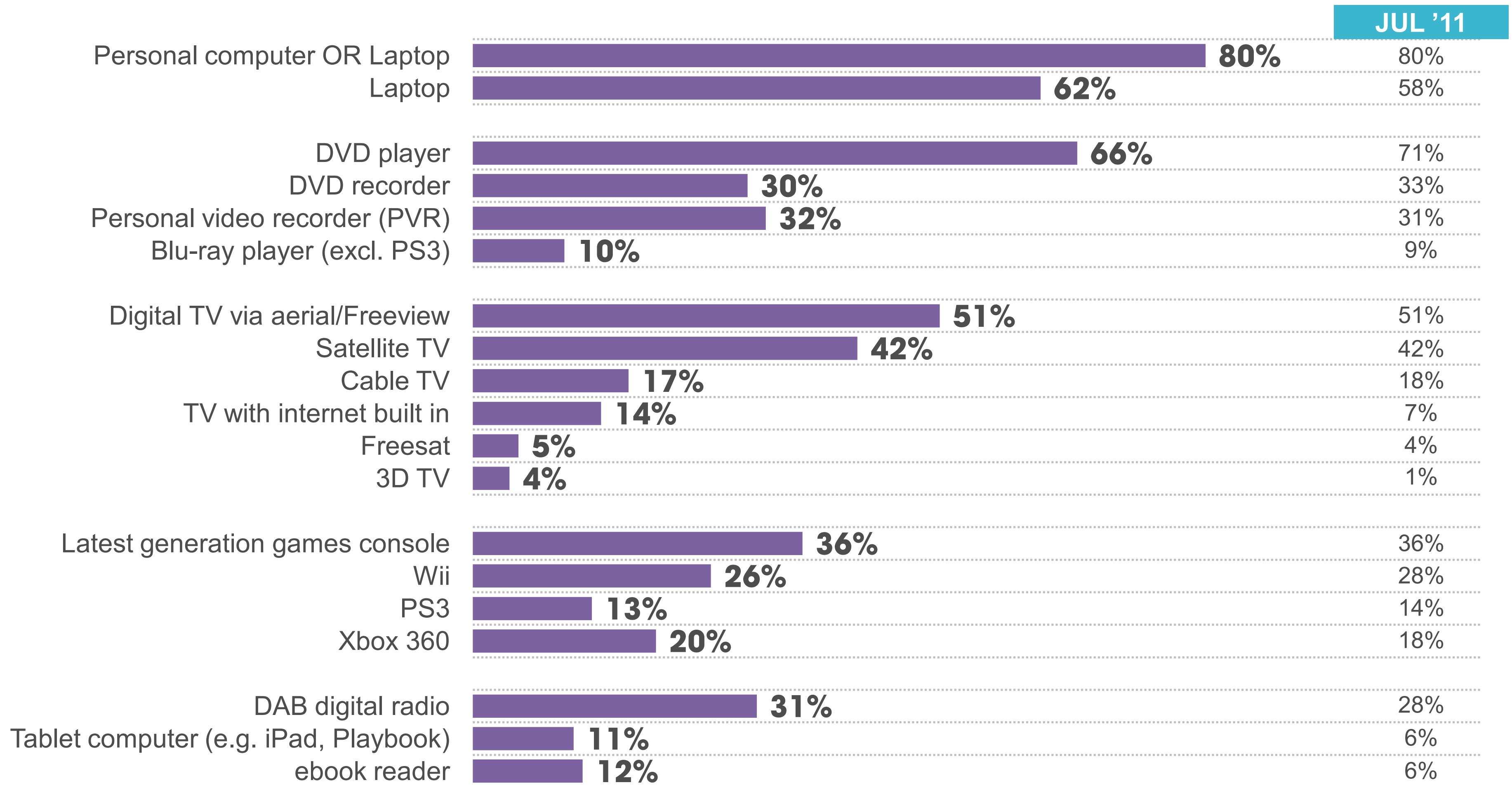
Base: circa 2,000 interviews per wave until January 2010, circa 1,000 GB adults aged 15+ per wave thereafter

Source: Ipsos MORI

CONNECTED HOME

EQUIPMENT IN THE HOME

WHICH OF THE FOLLOWING DO YOU OWN/HAVE IN YOUR HOUSEHOLD? : JULY 2012

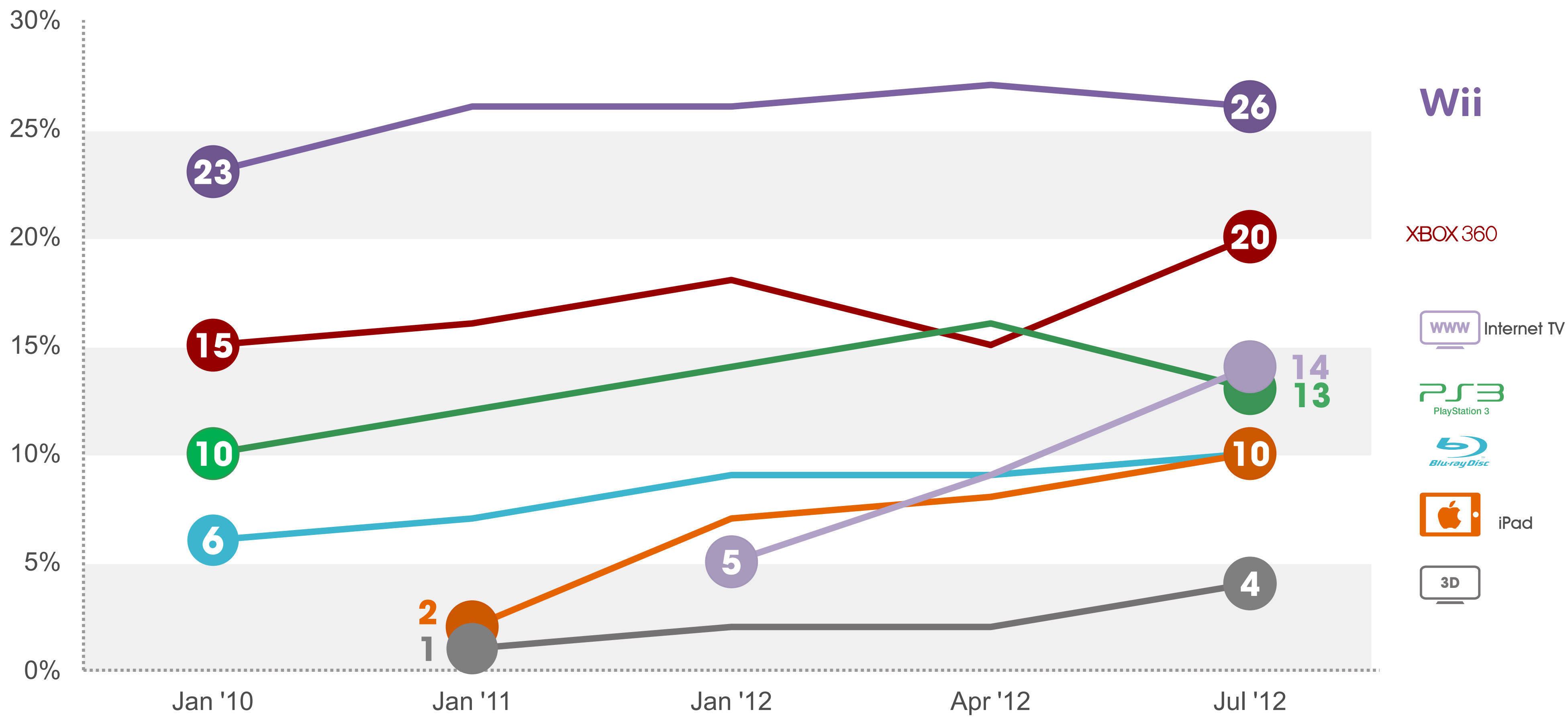


Base: 1,007 GB adults aged 15+: July 2012

Source: Ipsos MORI

TRENDS IN EQUIPMENT OWNERSHIP IN THE HOME

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

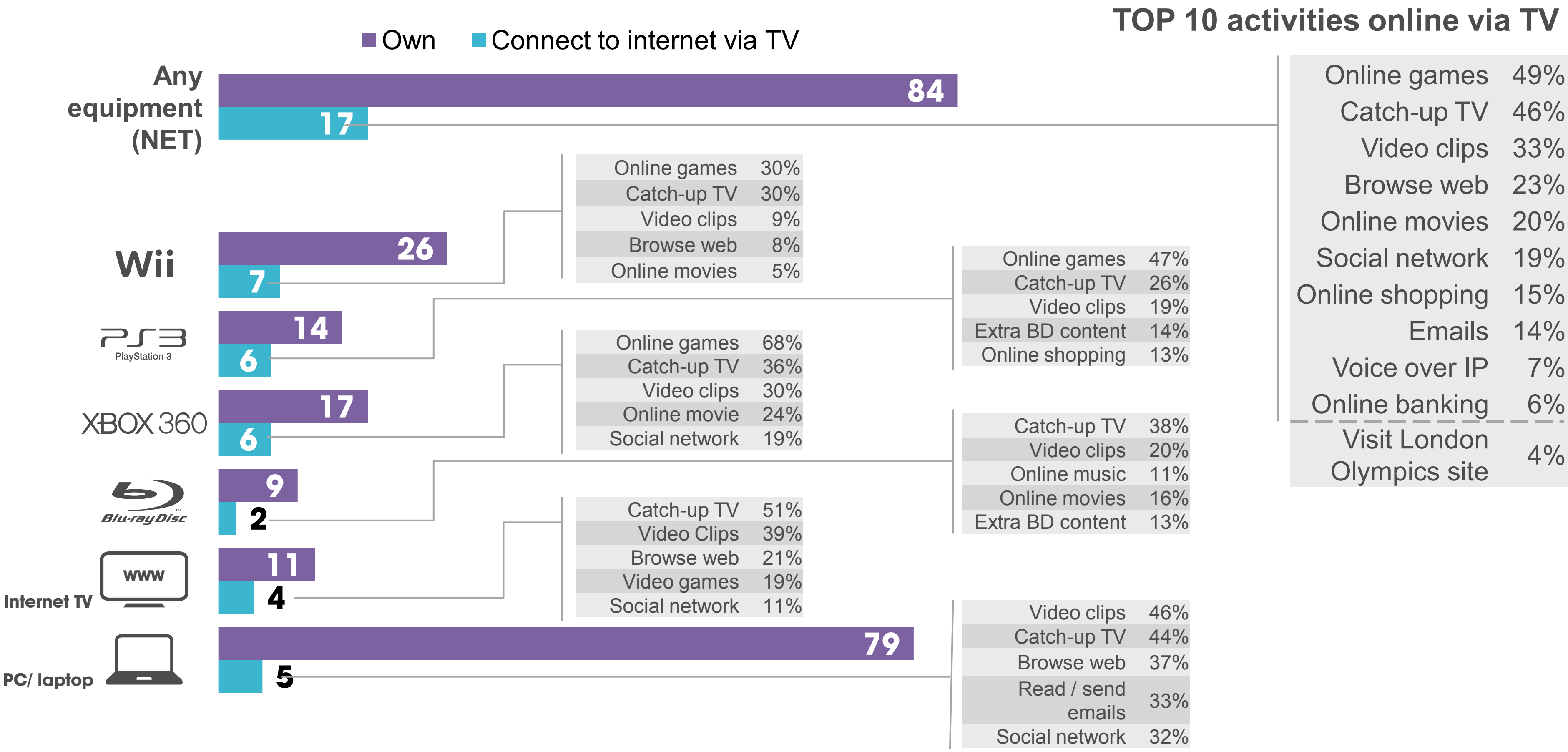


Base: circa 1,000 GB adults aged 15+ per wave

Source: Ipsos MORI

ACCESSING THE INTERNET VIA A TV

% USING EQUIPMENT TO ACCESS THE INTERNET VIA TV



Base: 1,957 GB adults aged 15+: April/July 2012 * Blu-ray based on Nov 2011 / Jan / Apr / Jul 2012

Source: Ipsos MORI

CONSOLES OWNED IN THE HOME

CONSOLE IN THE HOUSEHOLD – July 2012 (40% OWN ANY LATEST GENERATION)

Male	13%
Females	13%
15-34	18%
35-44	17%
45-54	22%
55+	2%
Children <10	21%
Aged 10-15	34%
No Children	9%

Male	21%
Females	18%
15-34	31%
35-44	26%
45-54	23%
55+	4%
Children <10	33%
Aged 10-15	42%
No Children	14%

Male	24%
Females	28%
15-34	33%
35-44	40%
45-54	37%
55+	7%
Children <10	45%
Aged 10-15	52%
No Children	18%

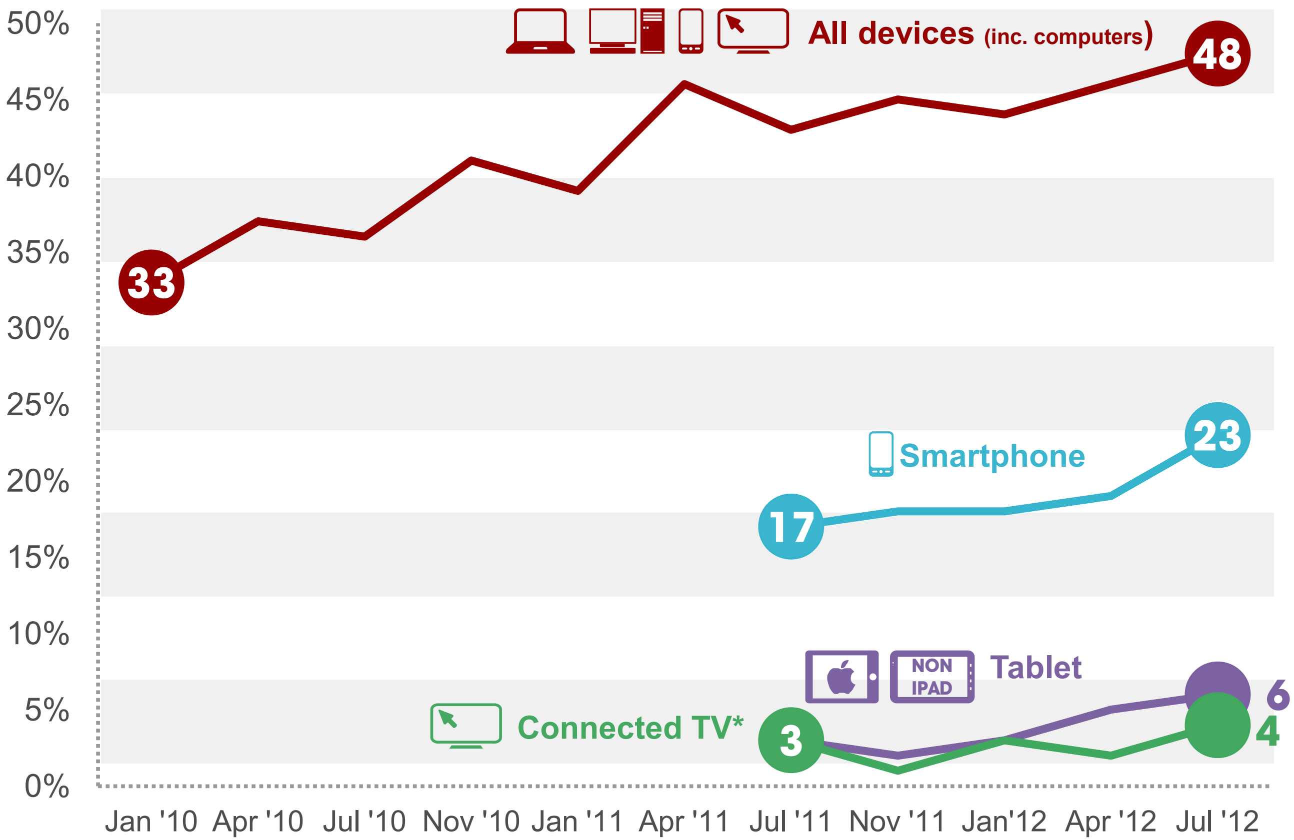
Base: 1,007 GB adults aged 15+: July 2012

Source: Ipsos MORI

SOCIAL NETWORKING

TRENDS IN VISITING SOCIAL NETWORKING SITES

VISITING SOCIAL NETWORK SITES – HALF OF GB ADULTS USE SOCIAL MEDIA



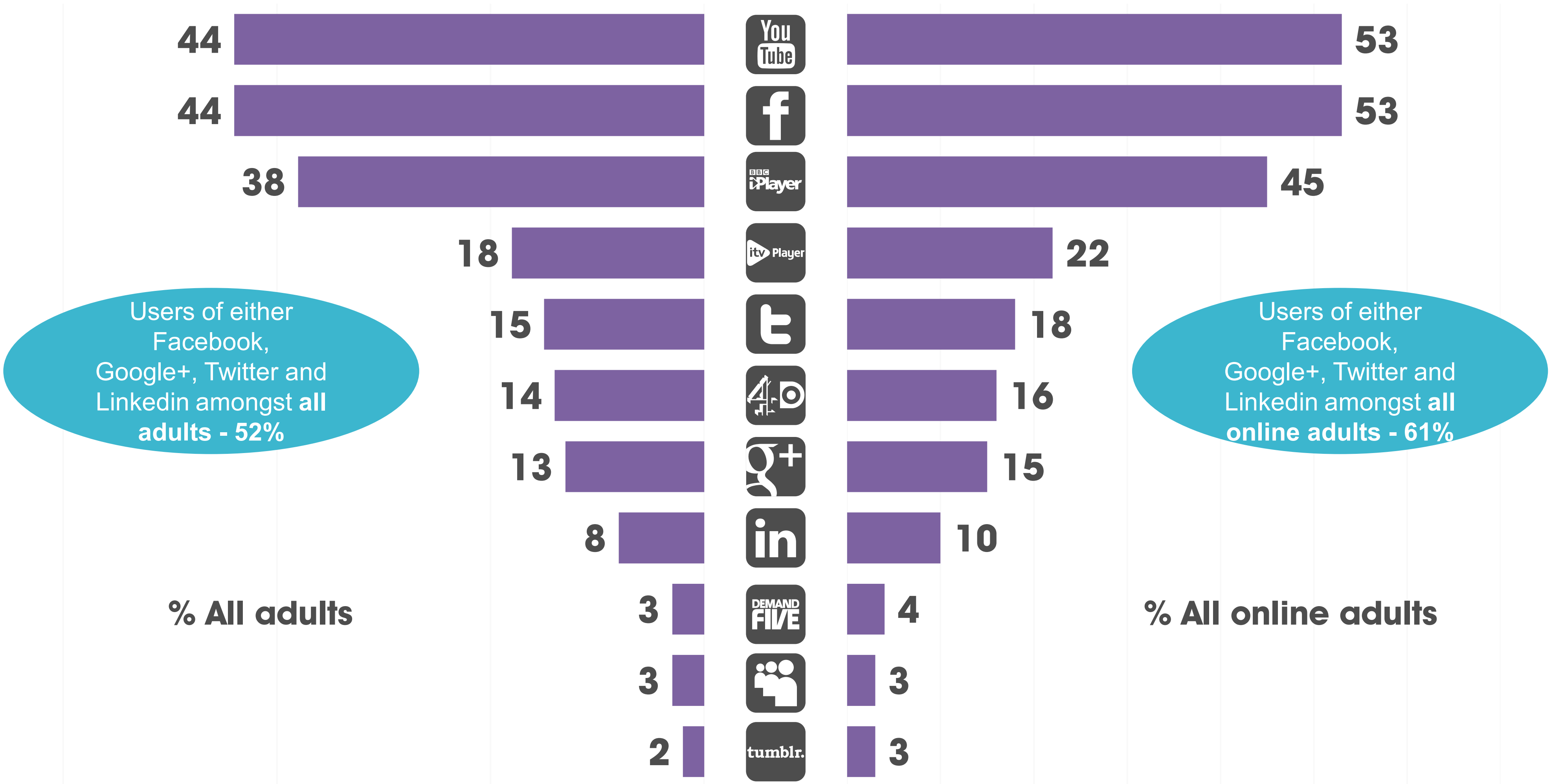
Connected TV* - Games console, web enabled TVs and PCs connected to a TV

Base: 1.007 GB adults aged 15+: July 2012

Source: Ipsos MORI

WEBSITES VISITED OR USED IN THE LAST 3 MONTHS

% WHICH OF THE FOLLOWING HAVE YOU VISITED IN LAST 3 MONTHS - JULY 2012



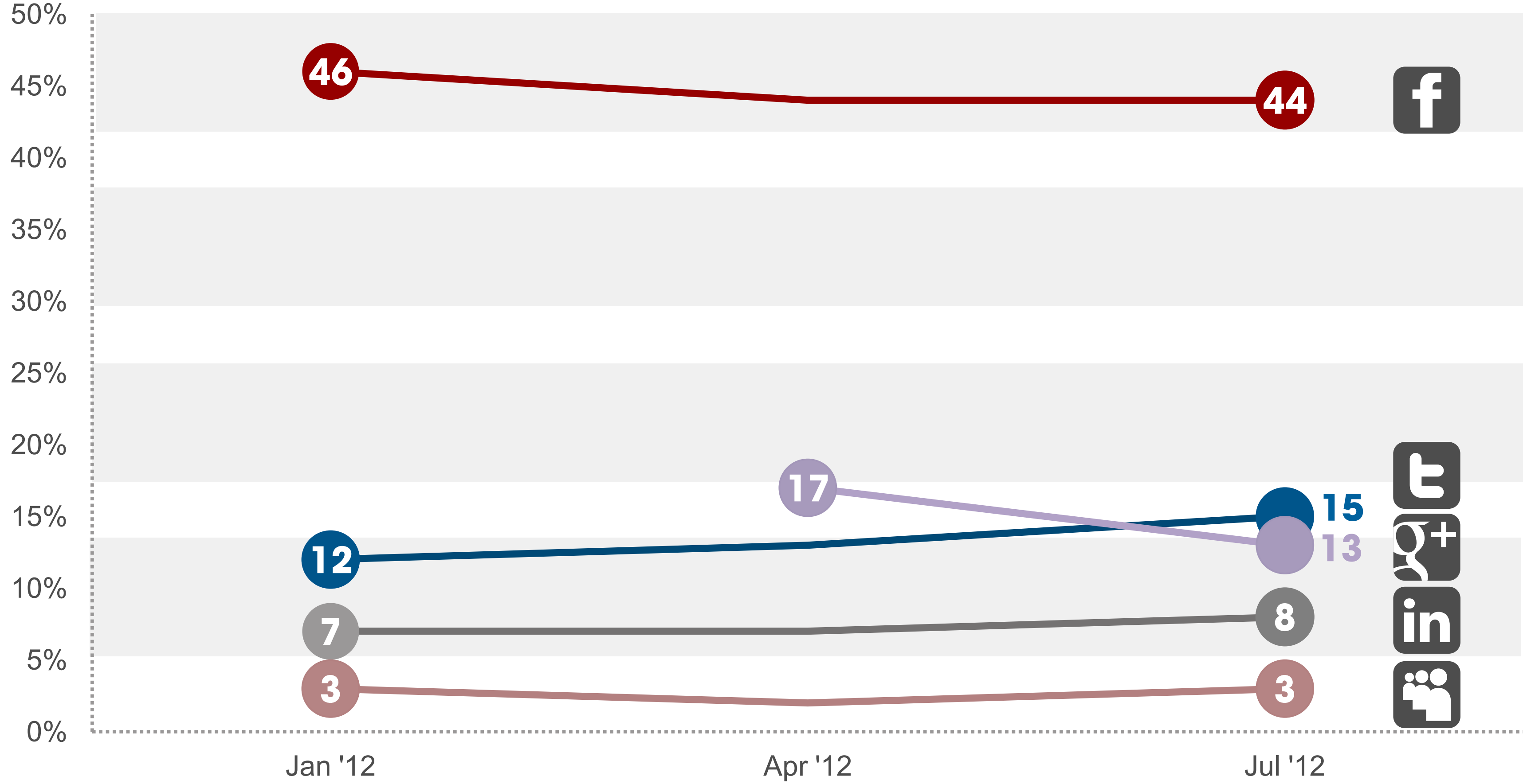
Base: 1.007 GB adults aged 15+: July 2012

Base: 812 GB online adults aged 15+: July 2012

Source: Ipsos MORI

TRENDS IN SOCIAL NETWORKING SITES VISITED

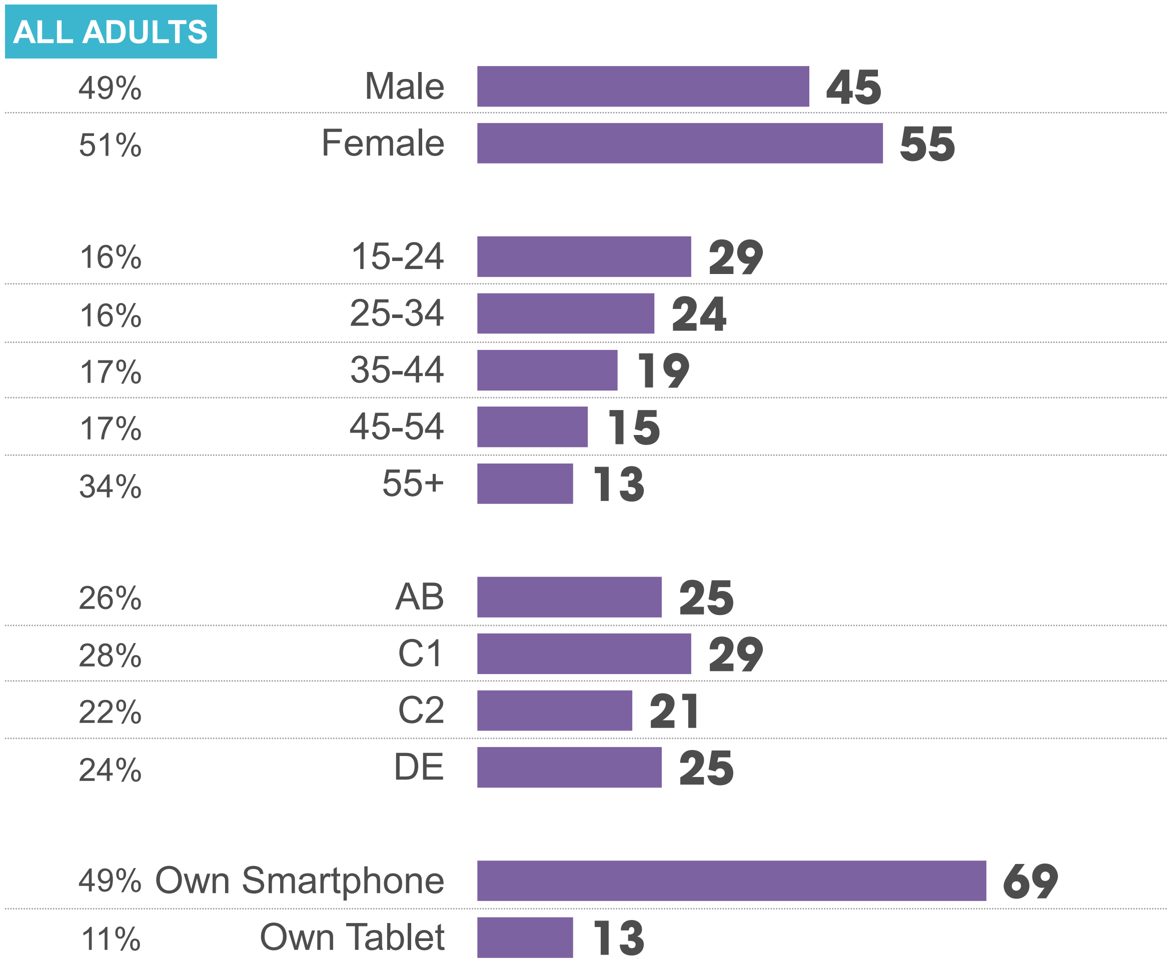
% WHICH OF THE FOLLOWING HAVE YOU VISITED IN LAST 3 MONTHS?



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

Source: Ipsos MORI

PROFILE OF FACEBOOK USERS

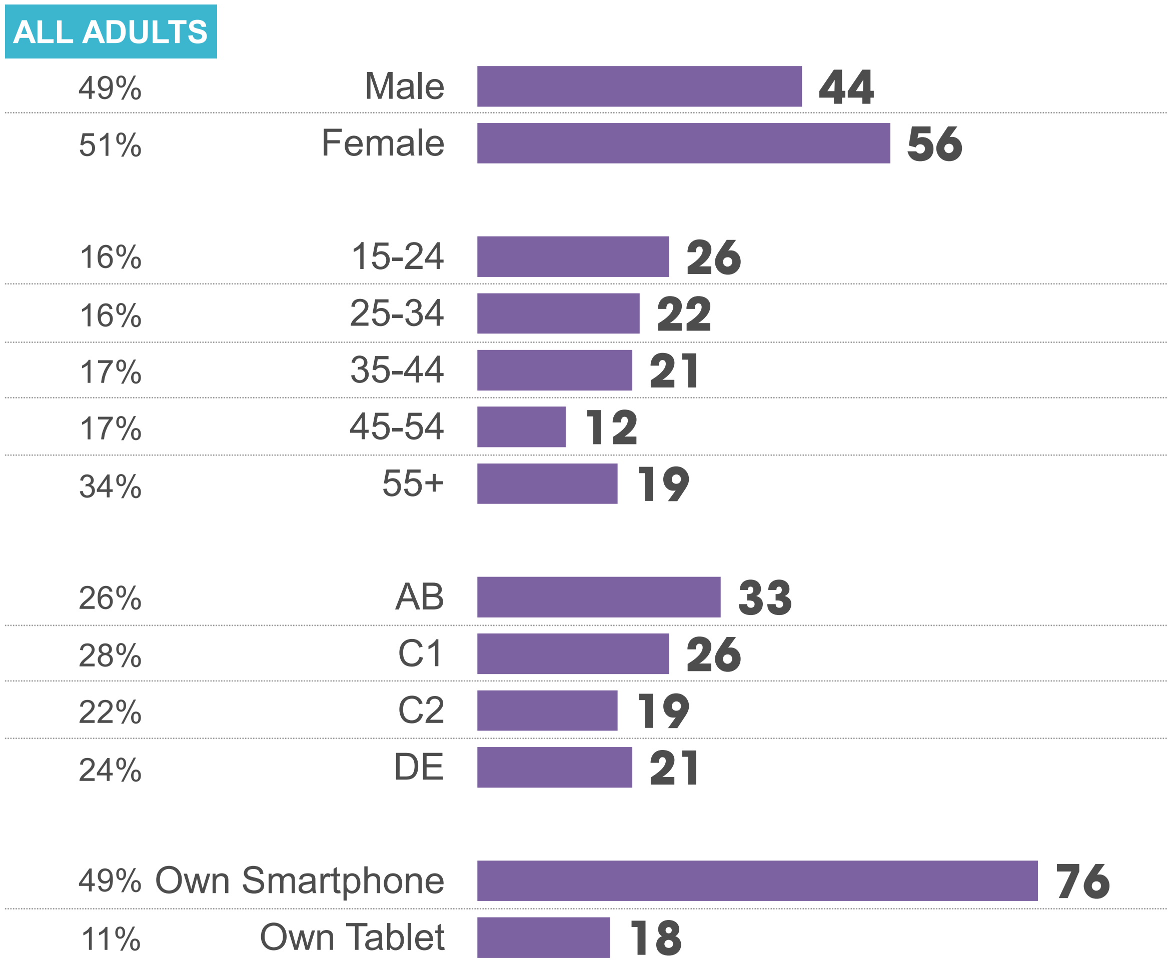


The profile of Facebook users when compared to the national population is slightly more female with a younger age base.

Base: All Adults (1,007) / All visiting / using Facebook in last 3 months (423) : July 2012

Source: Ipsos MORI

PROFILE OF GOOGLE+ USERS



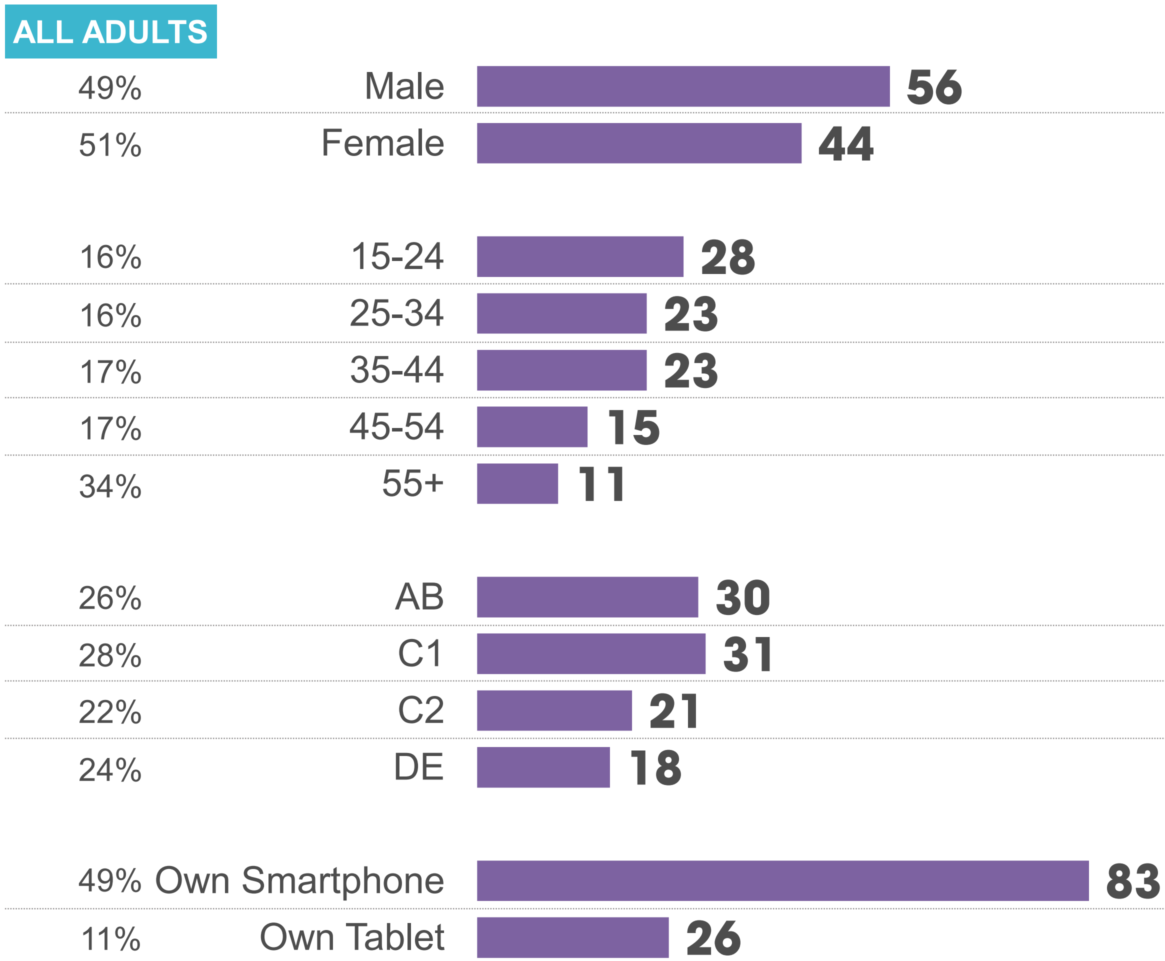
Demographic profile for Google+ users is quite similar to Facebook users with half aged under 35.

Three quarters of Google+ users have a smartphone.

Base: All Adults (1,007) / All visiting / using Google+ in last 3 months (114) : July 2012

Source: Ipsos MORI

PROFILE OF TWITTER USERS



Twitter users are young: half of them are aged under 35.

They are also slightly more likely to be AB or C1 social grade and very mobile: 83% of then own a smartphone, 26% a tablet.

Base: All Adults (1,007) / All visiting / using Twitter in last 3 months (135) : July 2012

Source: Ipsos MORI

PROFILE OF LINKEDIN USERS

ALL ADULTS		
49%	Male	67
51%	Female	33
16%	15-24	9
16%	25-34	27
17%	35-44	23
17%	45-54	31
34%	55+	10
26%	AB	56
28%	C1	34
22%	C2	8
24%	DE	2
49%	Own Smartphone	83
11%	Own Tablet	36

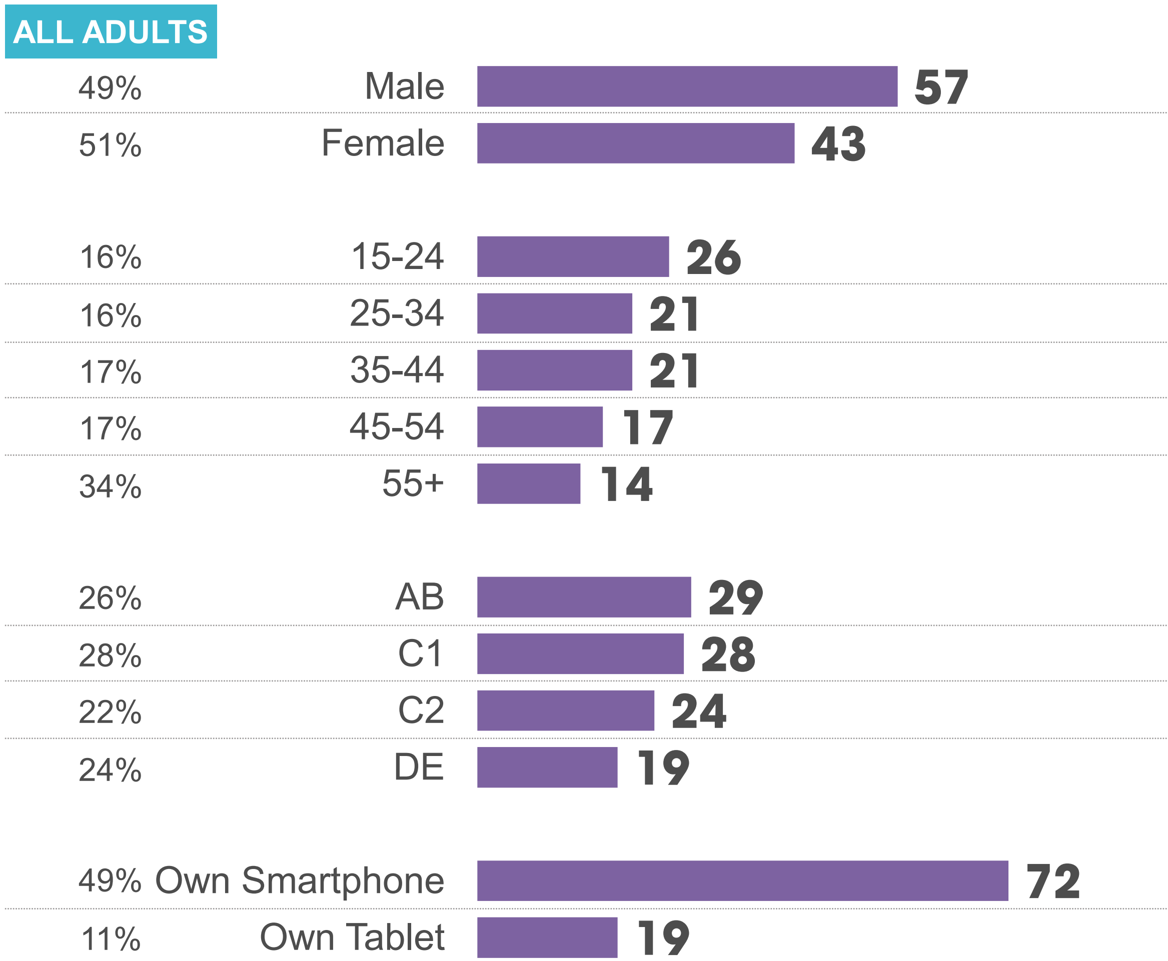
Linkedin is a more specific social network: its users skew towards males (67%), are older than on other networks (half are between 35 and 54) and more than half are social grade AB.

Consequently, the ownership level for tablets is more than three times that of the country average.

Base: All Adults (1,007) / All visiting / using Linkedin in last 3 months: (72) July 2012

Source: Ipsos MORI

PROFILE OF YOUTUBE USERS



YouTube users are more likely to be male and close to half of them are aged under 35.

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

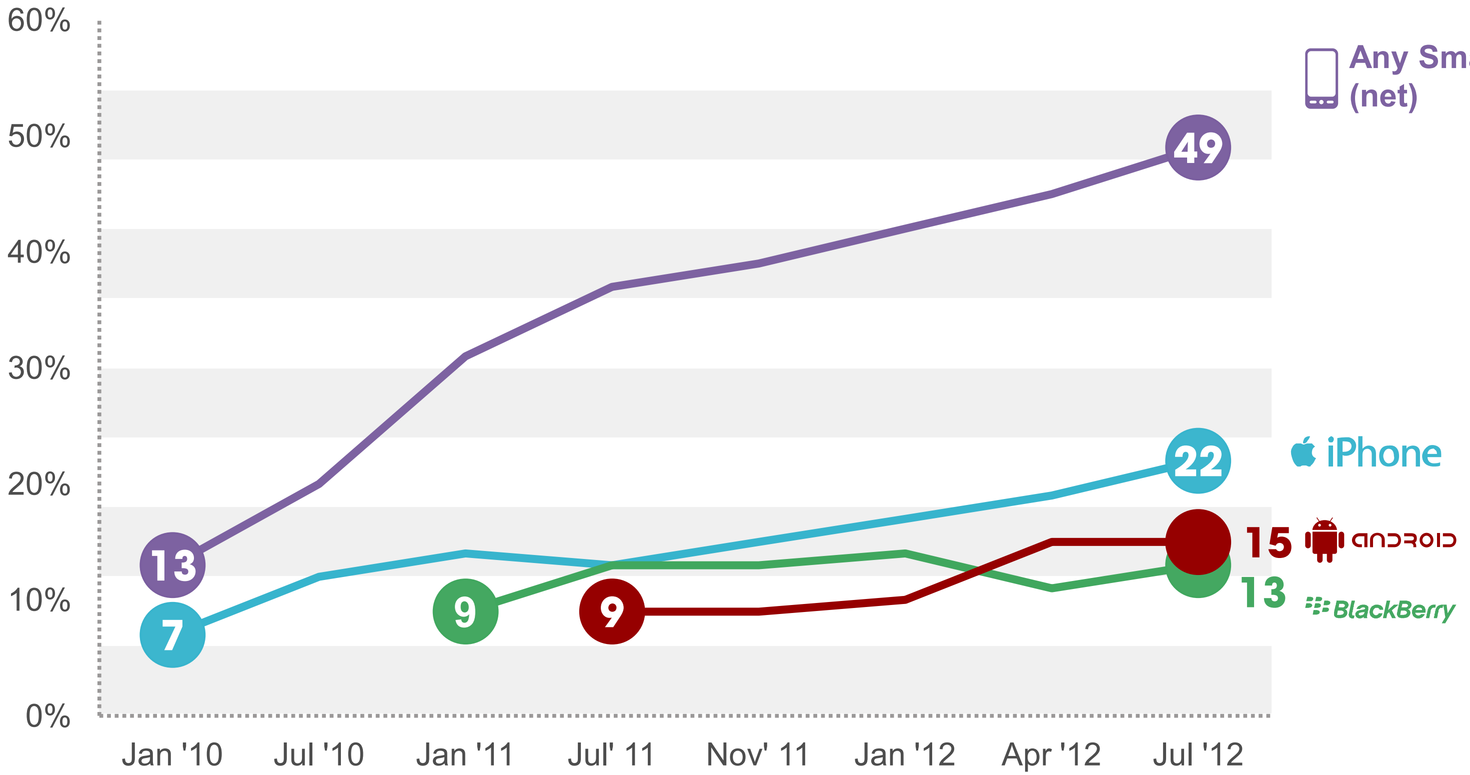
: Base: All Adults (1,007) / All visiting / using YouTube in last 3 months: (422) July 2012

Source: Ipsos MORI

SMARTPHONE OWNERSHIP

GROWTH IN SMARTPHONES

BLACKBERRY VS. IPHONE VS. ANDROID OWNERSHIP



iPhone	
Males 15-34	38%
Males 35+	18%
Female 15-34	30%
Females 35+	13%

Android	
Males 15-34	17%
Males 35+	14%
Female 15-34	30%
Females 35+	10%

BlackBerry	
Males 15-34	18%
Males 35+	12%
Female 15-34	24%
Females 35+	6%

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 ACROSS 2011/2012

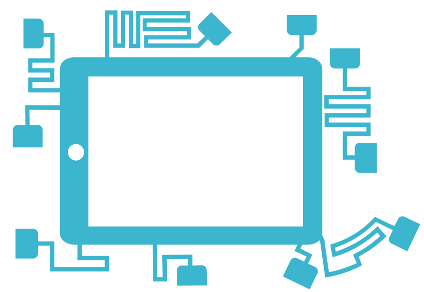
	All	15-24	25-34	35-44	45-54	55-64	65+
Males	48	68	72	62	49	29	10
Males AB	57	86	79	82	72	40	15
Males C1	52	66	82	55	48	39	11
Males C2	47	74	78	58	42	19	4
Males DE	34	56	49	43	27	8	6
Females	40	74	71	49	36	18	3
Females AB	46	77	85	63	46	24	4
Females C1	45	84	73	48	48	21	5
Females C2	38	68	64	38	30	14	3
Females DE	29	67	64	36	12	11	1

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

Base: 3,935 GB adults aged 15+: Nov 2011 / Jan / Apr / Jul 2012

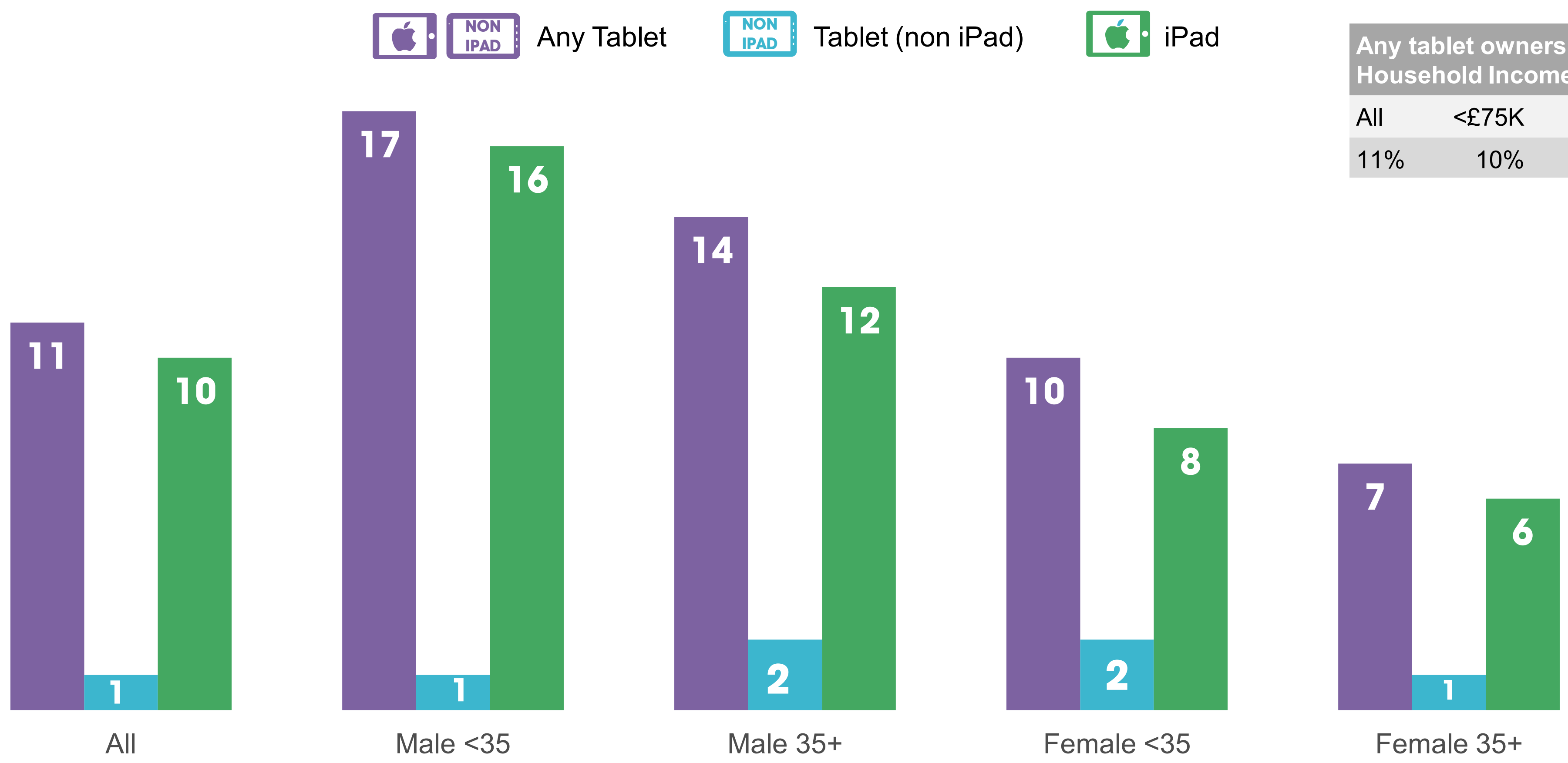
Source: Ipsos MORI

TABLET OWNERSHIP



TABLET OWNERSHIP

% OWN AN IPAD OR OTHER TABLET – JULY 2012



Any tablet ownership Household Income		
All	<£75K	£75K+
11%	10%	34%

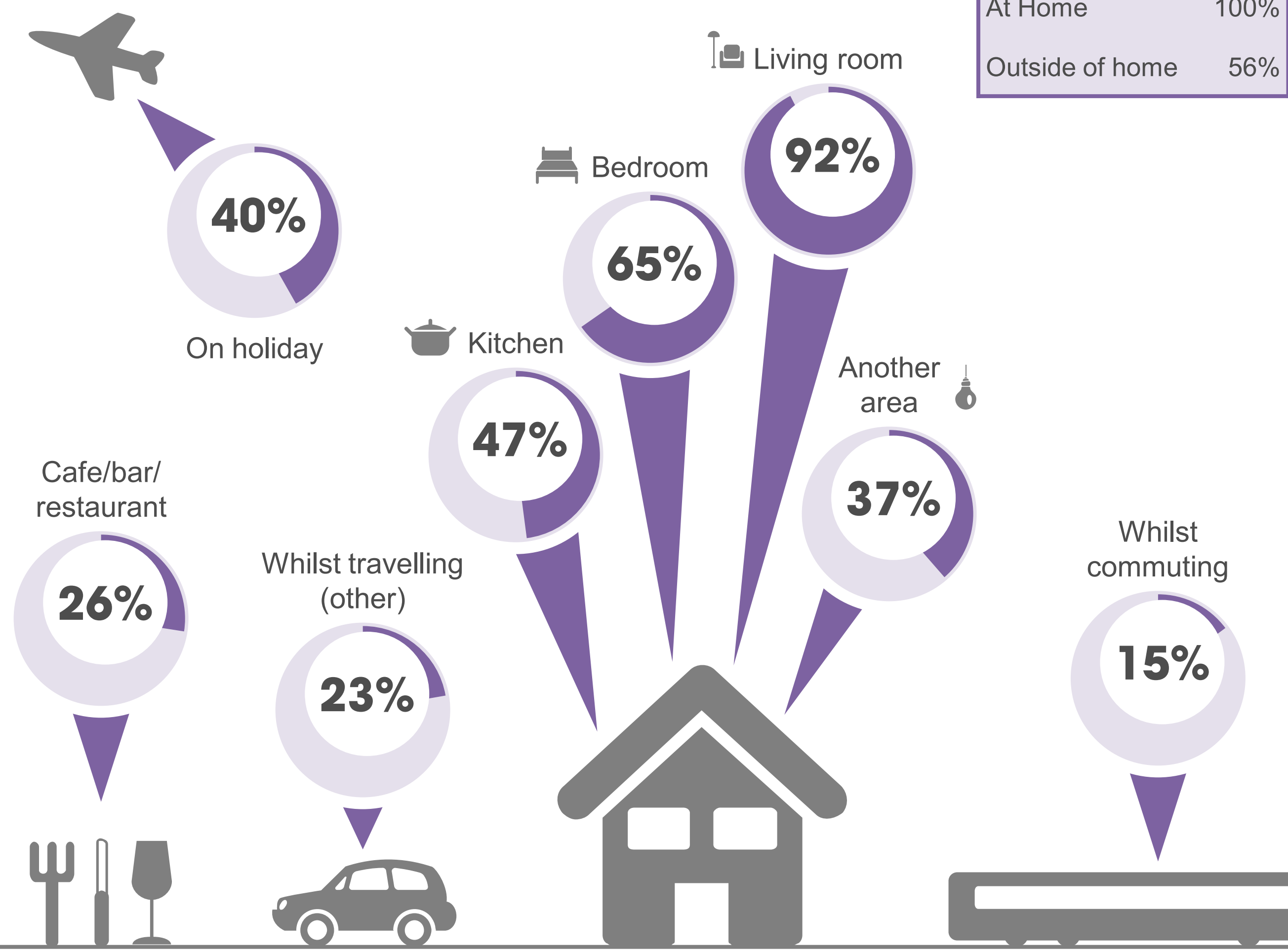
Base: 1007 GB adults aged 15+: July 2012

Source: Ipsos MORI

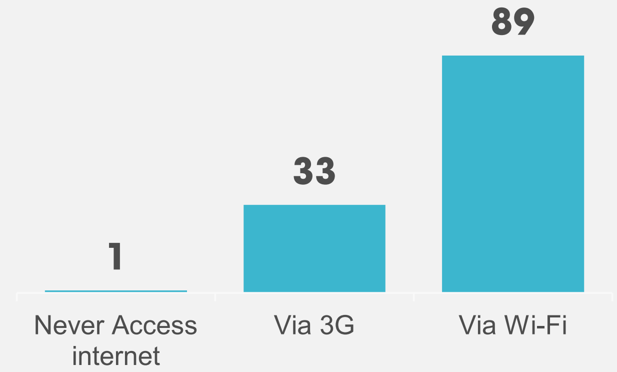
WHERE DO YOU USE YOUR TABLET DEVICE?

% LOCATION OF TABLET USAGE – JULY 2012

In vs. out of home use	
At Home	100%
Outside of home	56%



HOW DO YOU CONNECT TO THE INTERNET ON YOUR TABLET?

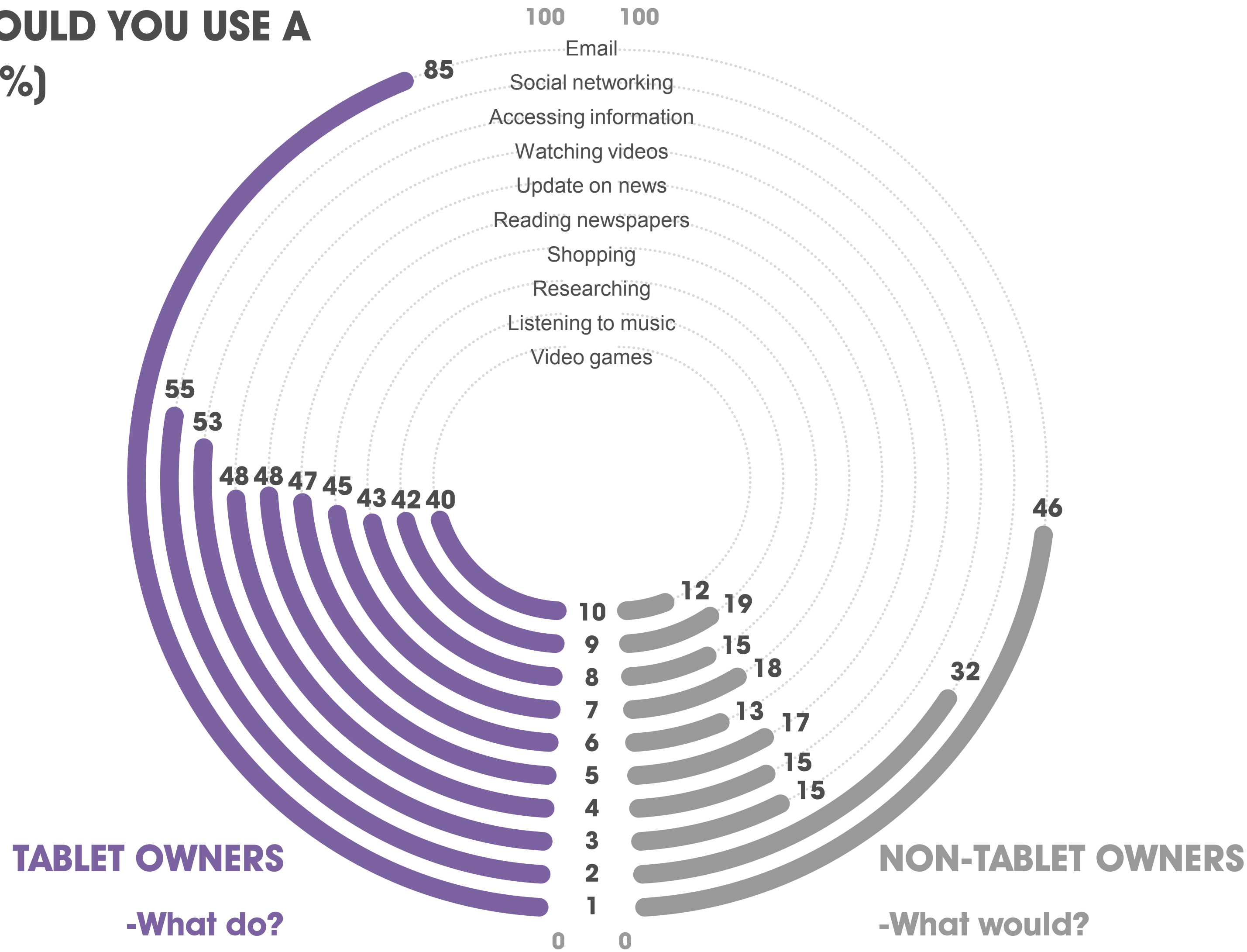


Base: 98 tablet owners aged 15+: July 2012

Source: Ipsos MORI

TABLET USAGE – WHAT FOR?

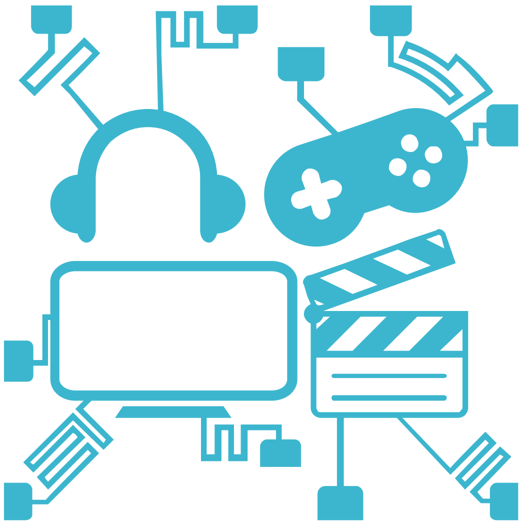
WHAT DO / WOULD YOU USE A TABLET FOR? (%)



Base: 98 tablet owners and 909 non-tablet owners aged 15+: July 2012

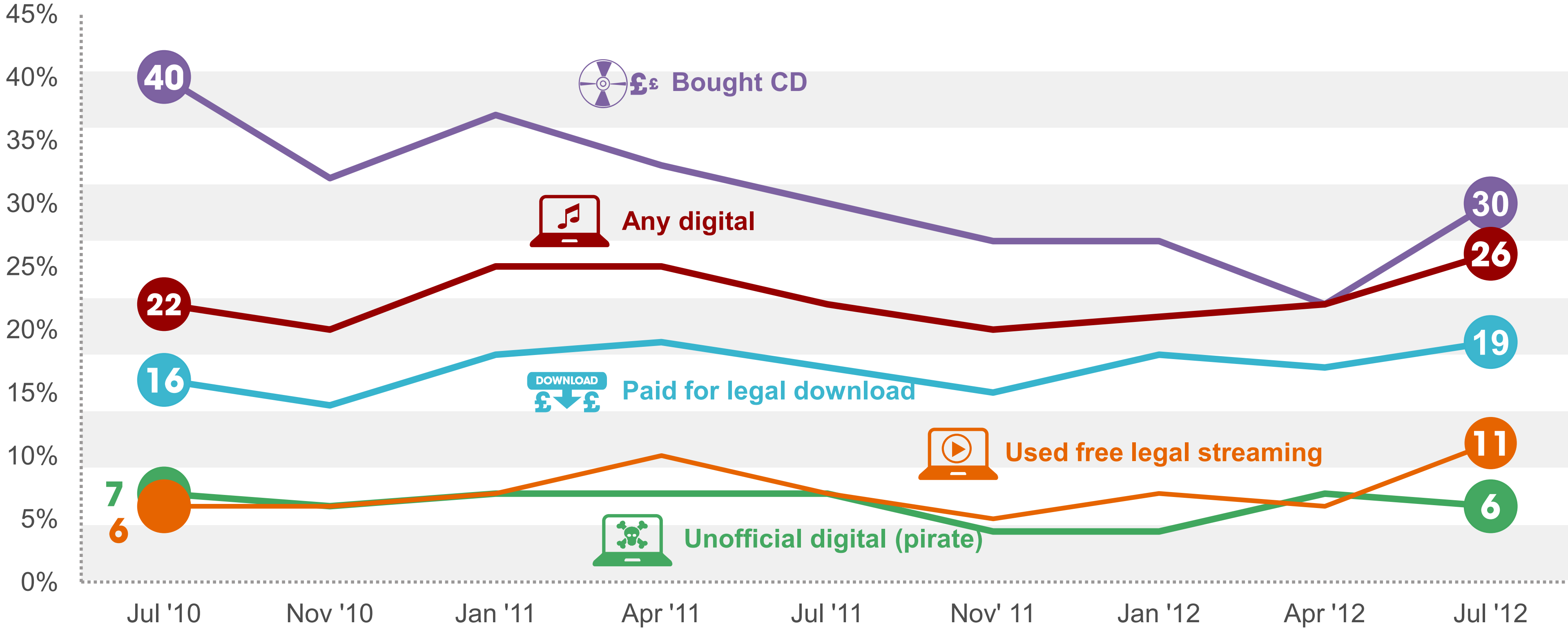
Source: Ipsos MORI

HOW WE CONSUME CONTENT - MUSIC



HOW WE CONSUME MUSIC

MUSIC CONSUMPTION IN THE PRECEDING 12 MONTHS

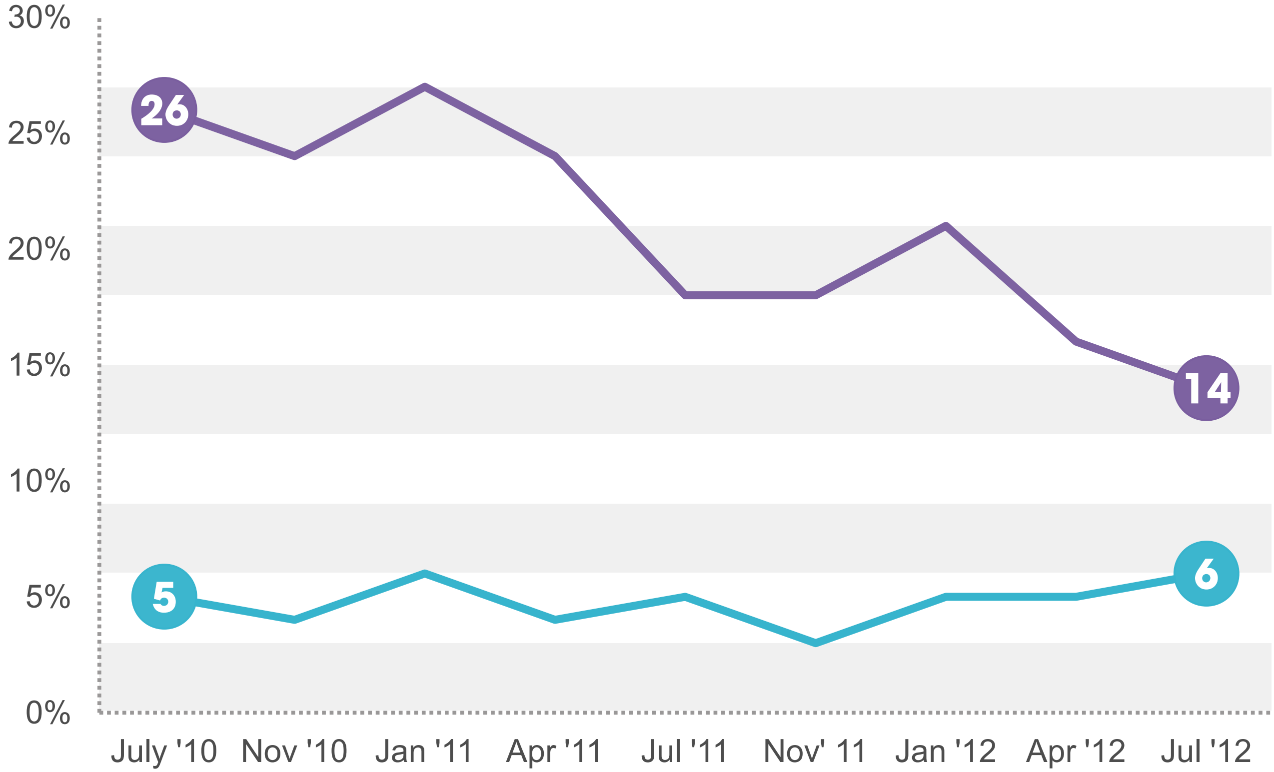


Base: circa 1,000 GB adults aged 15+ per wave

Source: Ipsos MORI

HOW WE CONSUME GAMES FOR CONSOLES

GAMES CONSUMPTION IN THE PRECEDING 12 MONTHS



Bought a game on a disc for console

PS3 owners	34%
Xbox 360 owners	46%
Wii owners	28%

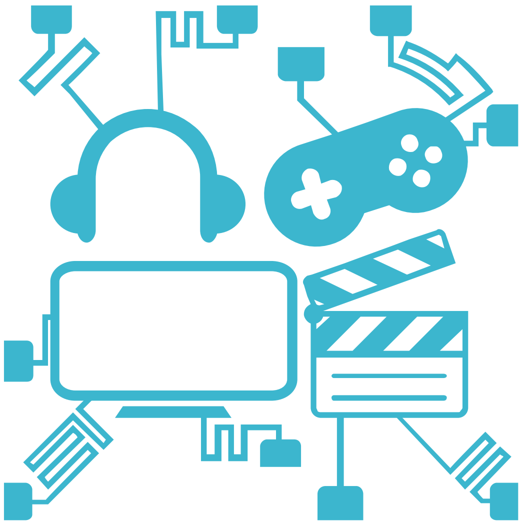
Paid to download a game direct to console

PS3 owners	20%
Xbox 360 owners	25%
Wii owners	12%

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

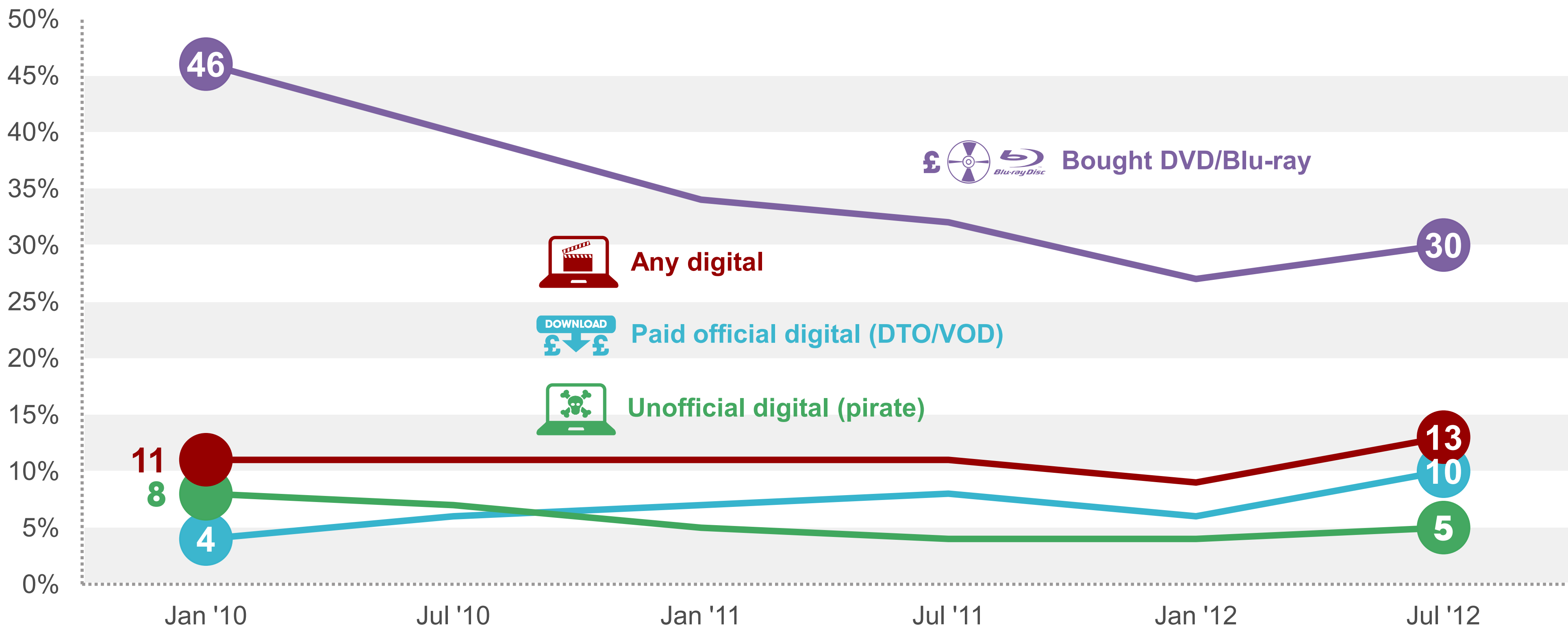
Source: Ipsos MORI

HOW WE ACCESS CONTENT – MOVIES / TV



HOW WE ACCESS MOVIES

MOVIE CONSUMPTION IN THE PRECEDING 12 MONTHS

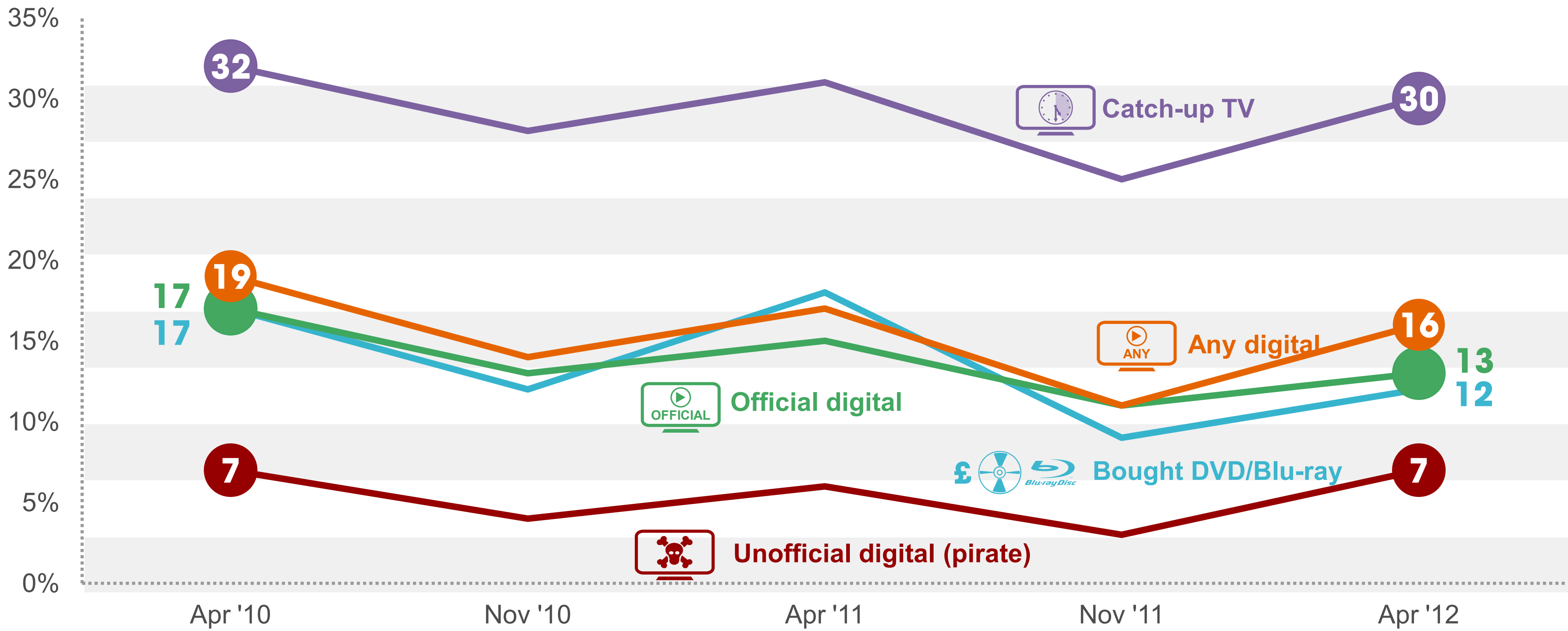


Base: circa 1,000 GB adults aged 15+ per wave

Source: Ipsos MORI

HOW WE ACCESS TV SERIES

TV SERIES CONSUMPTION IN THE PRECEDING 12 MONTHS



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

Source: Ipsos MORI

TECH TRACKER TECHNICAL DETAILS

Ipsos MORI interviewed a quota sample of **1007 adults aged 15+ in GB.**

The latest interviews were carried out face to face **20th – 26th July 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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