Ipsos MediaCT
The Media, Content and Technology Research Specialists

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TECH TRACKER

QUARTERLY RELEASE: Q1 2013

Technology Tracker

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

GB FACE TO FACE SURVEY

LATEST WAVE
QUARTER 1 2013 (Field in February)

REPRESENTATIVE SAMPLE OF 1,024 GB ADULTS AGED 15+

AREAS COVERED

- Internet usage
- Connected home
- Social networking
- Smartphones/tablets
- Music/games & movies/TV
- Online Movie Consumption

Headlines

Internet usage

The proportion of adults accessing the internet is at 84% with 48% now accessing via a mobile.

The top activities online remain: accessing email (75%), browsing for information on hobbies (69%), researching products and services (63%) and online shopping (56%).

Smartphones & Tablets

Smartphone ownership has risen to 53%. Ownership of iPhones is pretty stable whereas Android smartphone ownership increased (20%) and BlackBerry remain stable (13%). iPhone ownership is highest amongst Female aged 35+ at 30%.

The tablet market has risen to 25% of the adult population owning one. Ownership of any tablet is highest amongst Males above 35 at 36%.

Connected home

Number of household with connected TV is doubled. 12% of GB adults has internet connected TV and among these adults 5% use the internet for catch-up TV, online clips and movies.

35% of GB adults have at least one of the latest generation games consoles in their household but this has seen a recent reduction in line with reduced number of households still with a wii console.

Music/games & movies/TV

The proportion of adults paying for music CDs and movies on disc /Blu-rays has slightly risen year on year. Likewise official music and movie consumption has risen.

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 10%; with 4% paying to download an online game.

Social networking

50% of GB adults access social network sites, over half of whom via a Smartphone. 11% have access via a tablet and 4% access via a TV connected to the internet.

49% of all adults have used Facebook in the past 3 months and 17% have used Google+ (the Google social network site). Usage of Twitter is steady, currently at 16% of the GB population.

Online Movie Consumption

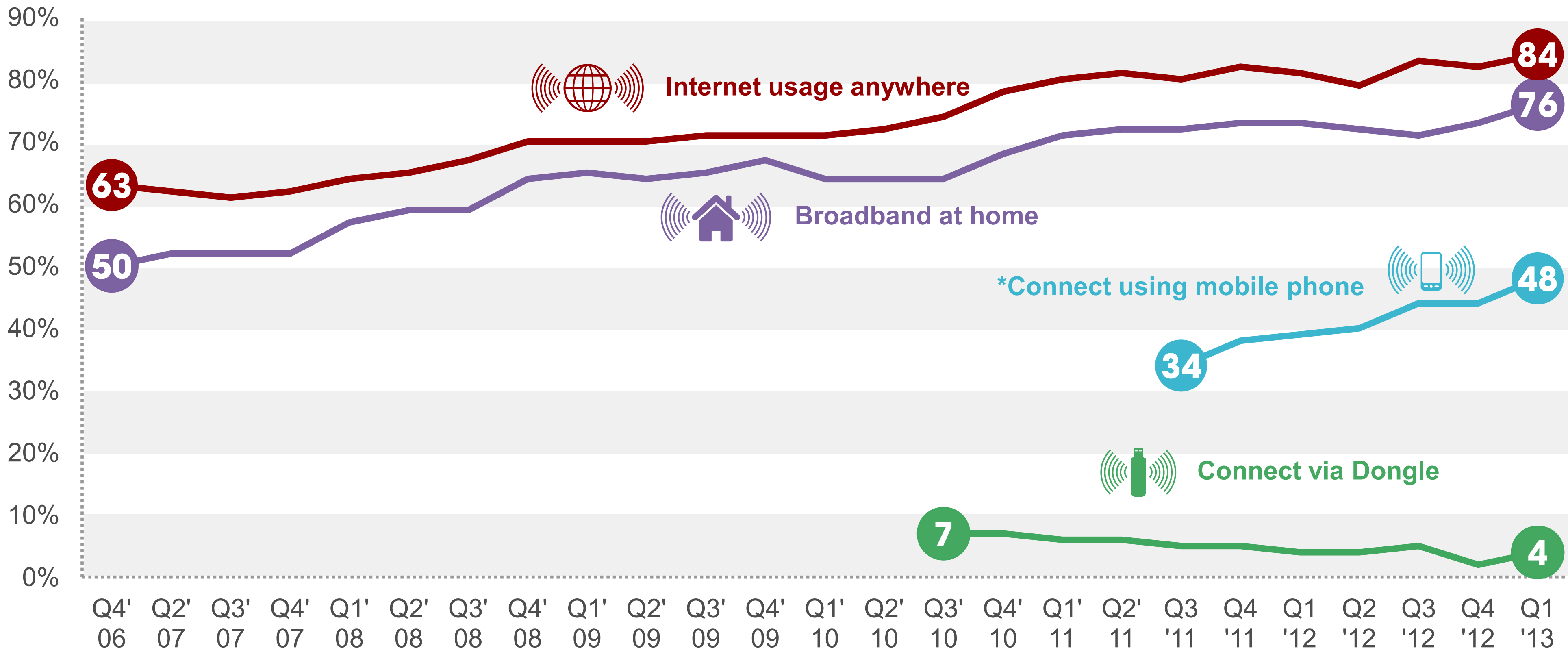
12% tend to watch full-length movies over internet at least once a week. The proportion of adults who still prefer to download or stream the full-length movies for free is at 14%, this follows by pay regularly for subscription such as Love film instant or Netflix (9%). 6% prefer to pay per movie such as using iTunes movie rentals or Blinkbox.

INTERNET USAGE

HOW, WHEN, WHERE

INTERNET USAGE TRENDS

INTERNET CONNECTION



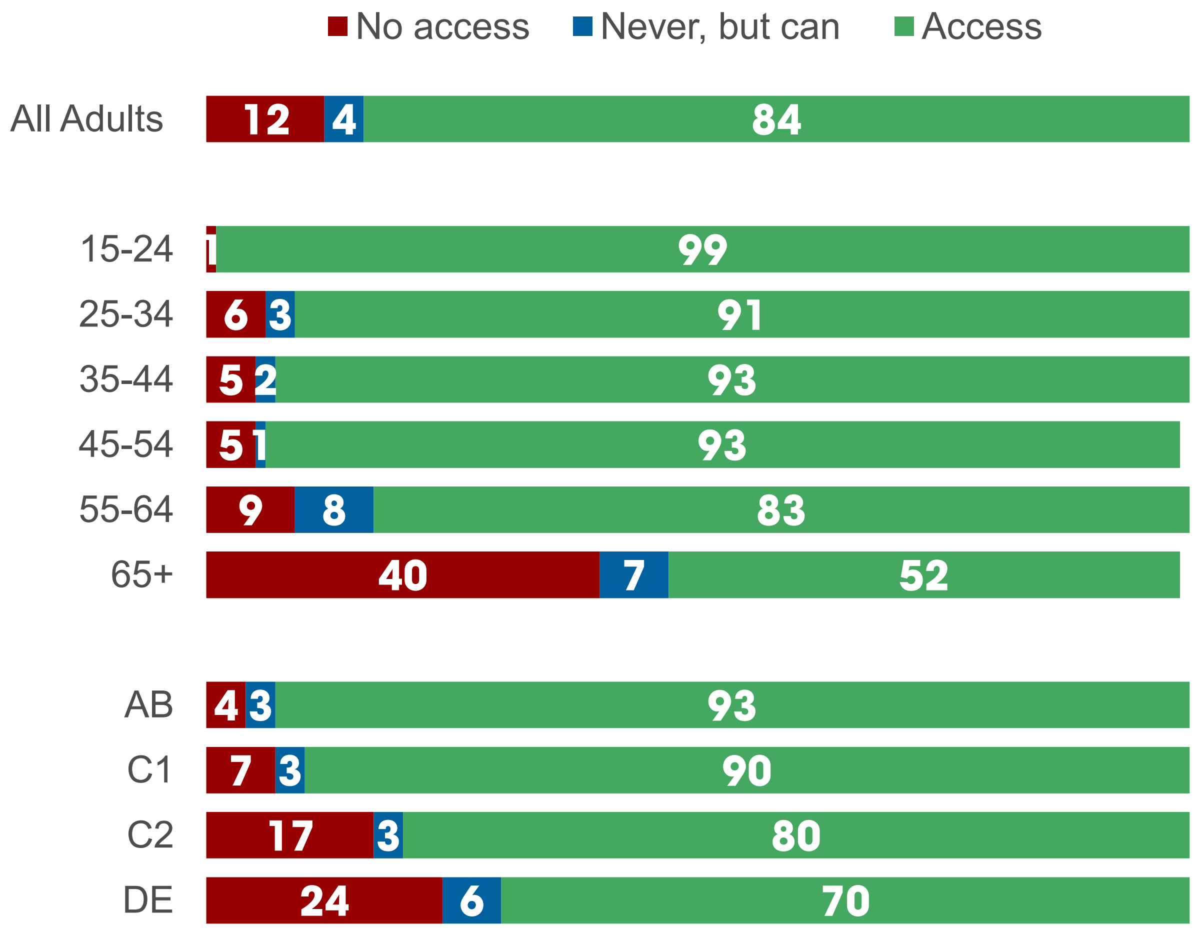
* The wording used for measuring 'internet connection by mobile phone' has been updated which means earlier data is not strictly comparable and is therefore not shown

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

Source: Ipsos MORI

WHO IS AND ISN'T ACCESSING THE INTERNET

% ACCESS TO THE INTERNET: Quarter 1 2013



In Quarter 1 2013, 12% 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 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: 1,024 GB adults aged 15+: Quarter 1 2013

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	84	96	94	94	90	77	57
Males AB	93	93	100	100	98	89	85
Males C1	91	97	97	98	95	87	65
Males C2	80	99	96	95	86	69	35
Males DE	69	91	86	78	76	48	23
Females	80	94	93	90	90	76	48
Females AB	93	100	100	99	99	96	73
Females C1	87	99	97	98	91	85	56
Females C2	76	92	93	87	95	53	35
Females DE	62	87	86	73	66	54	26

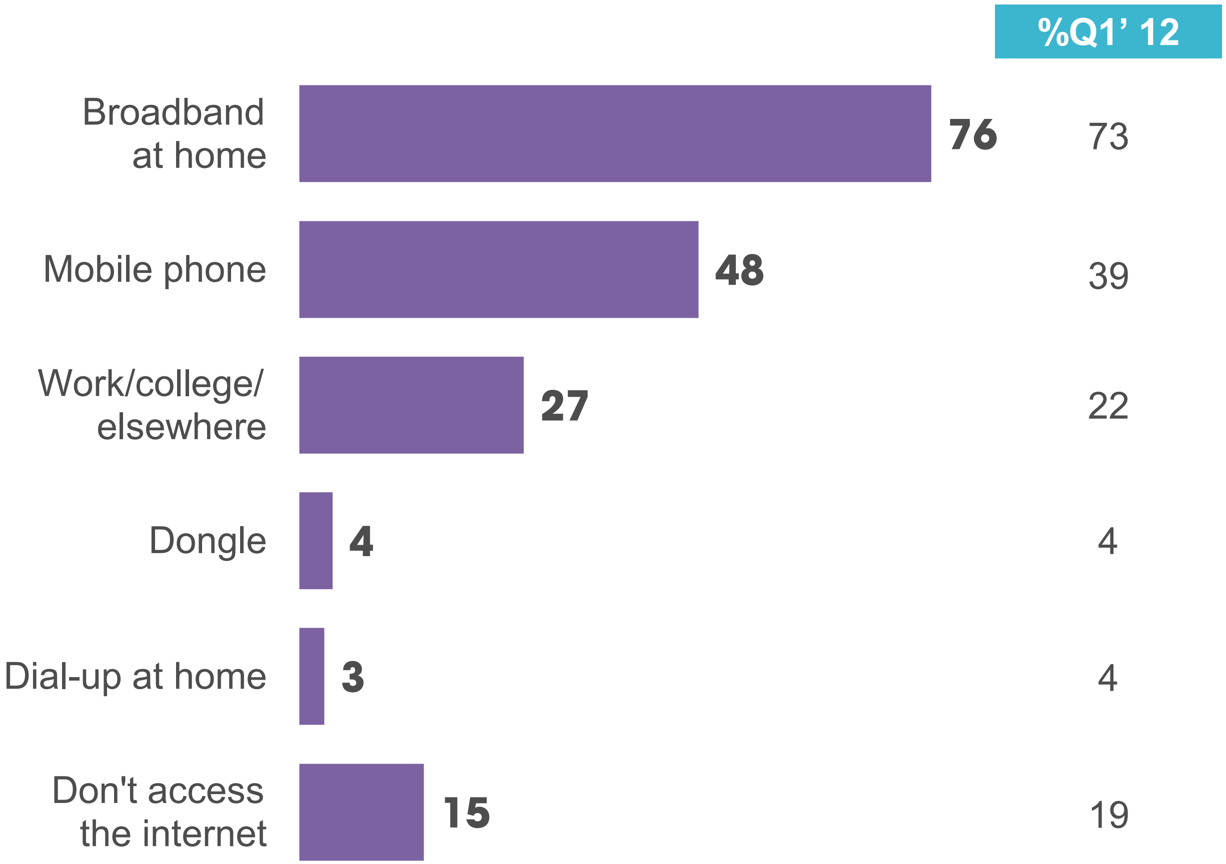
0-49% 50-79% 80-100%

Base: circa 4000 GB adults aged 15+: Q2/ Q3/ Q4 2012/ Q1 2013

Source: Ipsos MORI

HOW PEOPLE CONNECT TO THE INTERNET

% ACCESS TO THE INTERNET: Quarter 1 2013



In the past year, the proportion of homes accessing the internet via broadband at home has remained high at 76%.

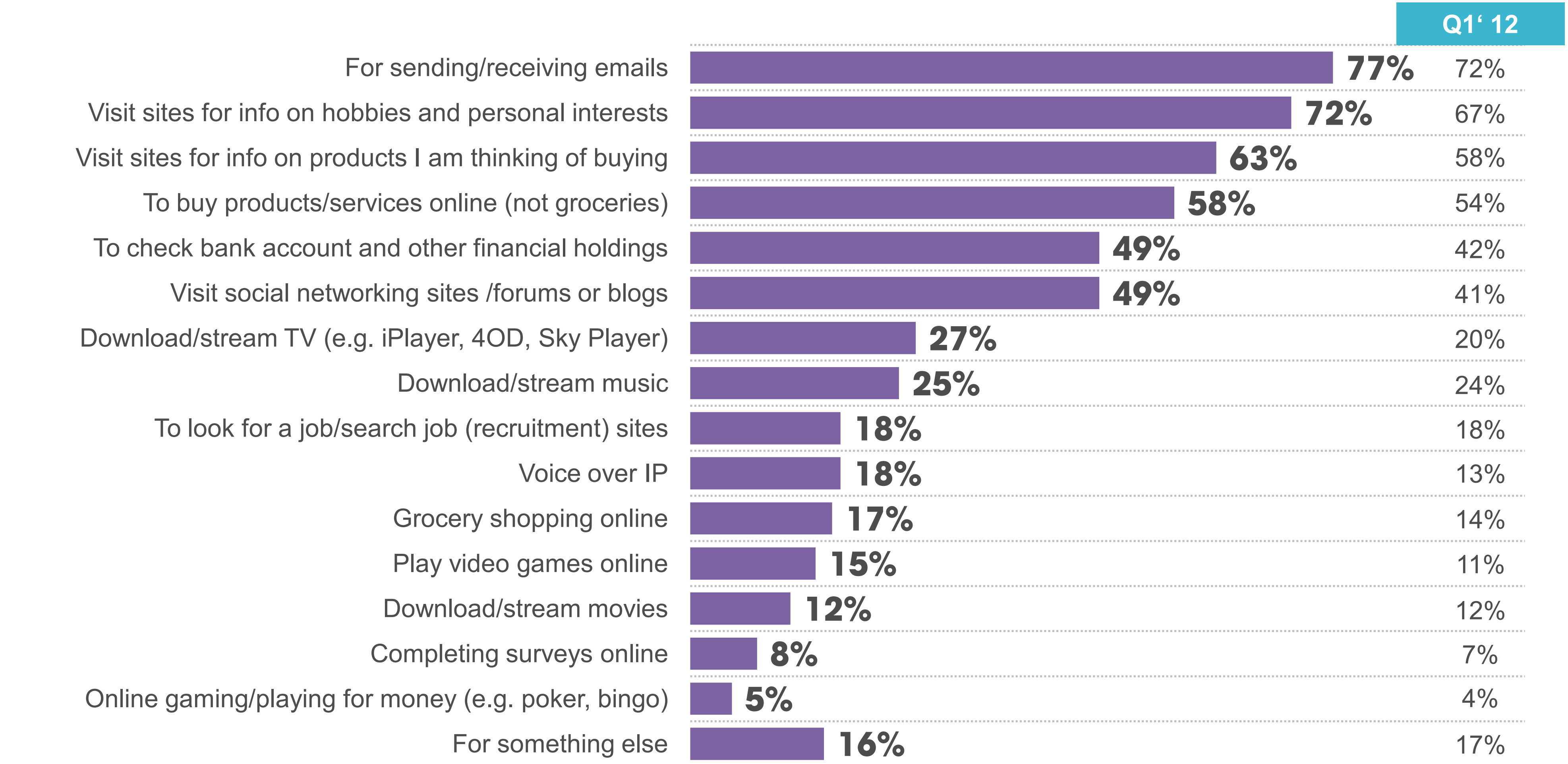
As the proportion of smartphone owners has increased further, 48% now access the internet via their mobile phone and only 3% access via dial-up.

Base: 1,024 GB adults aged 15+: Quarter 1 2013

Source: Ipsos MORI

WAYS THE INTERNET IS USED

USE OF THE INTERNET IN THE PAST 3 MONTHS: Quarter 1 2013

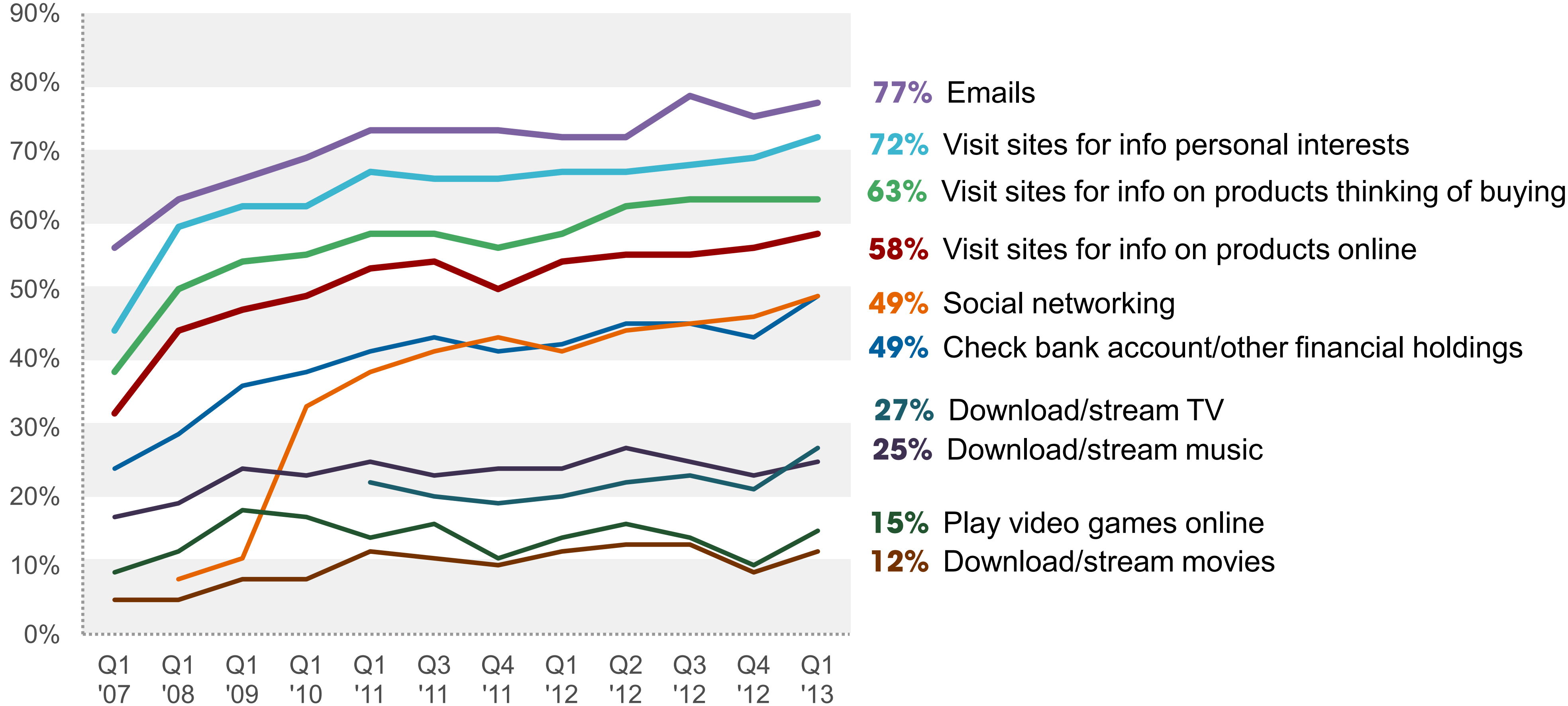


Base: 1,024 GB adults aged 15+: Quarter 1 2013

Source: Ipsos MORI

CHANGING WAYS THE INTERNET IS USED

USE OF THE INTERNET IN THE PAST 3 MONTHS



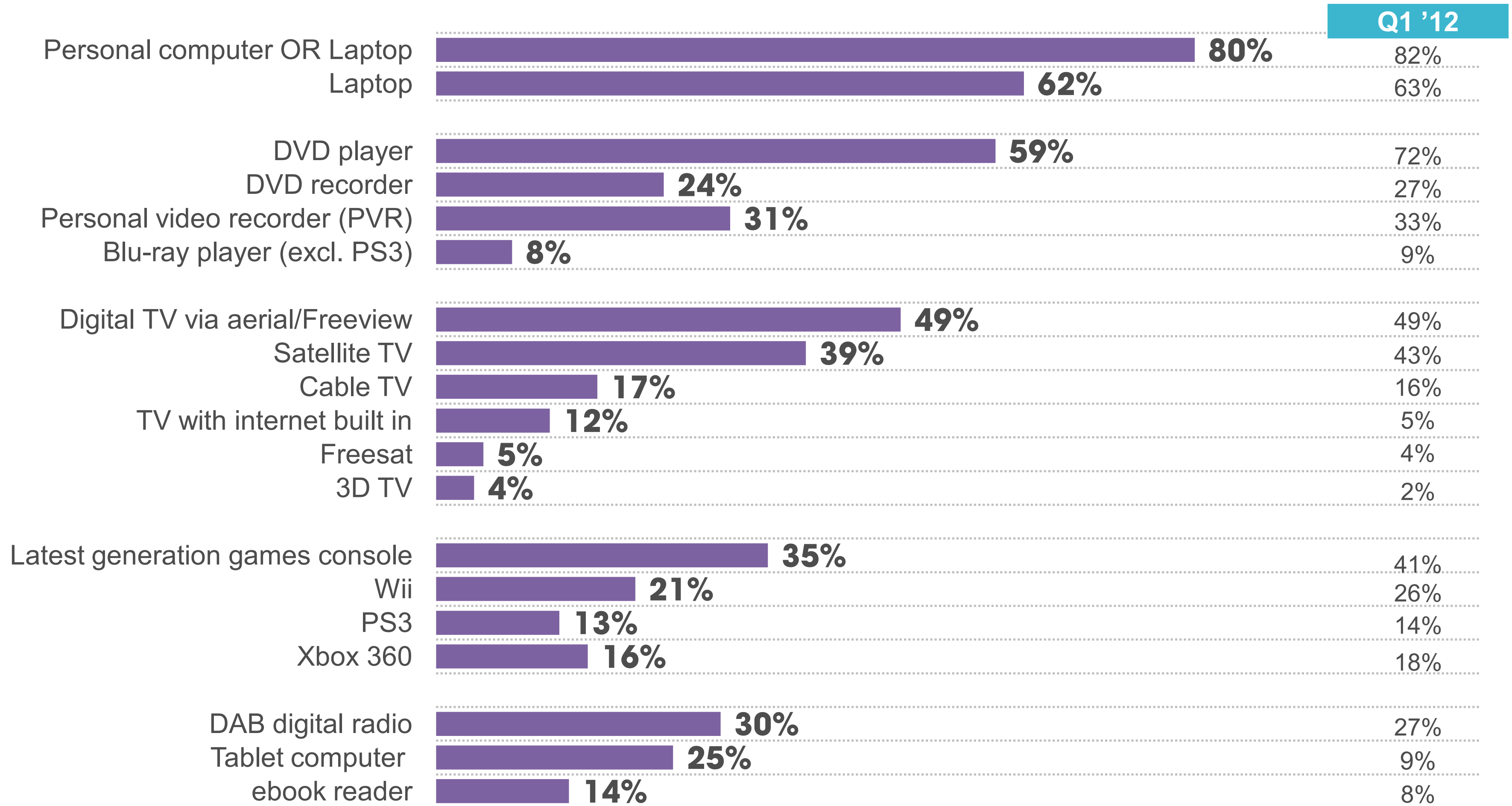
Base: circa 2,000 interviews per wave until Quarter 1 2010, circa 1,000 GB adults aged 15+ per wave thereafter

Source: Ipsos MORI

CONNECTED HOME

EQUIPMENT IN THE HOME

WHICH OF THE FOLLOWING DO YOU OWN/HAVE IN YOUR HOUSEHOLD? Quarter 1 2013

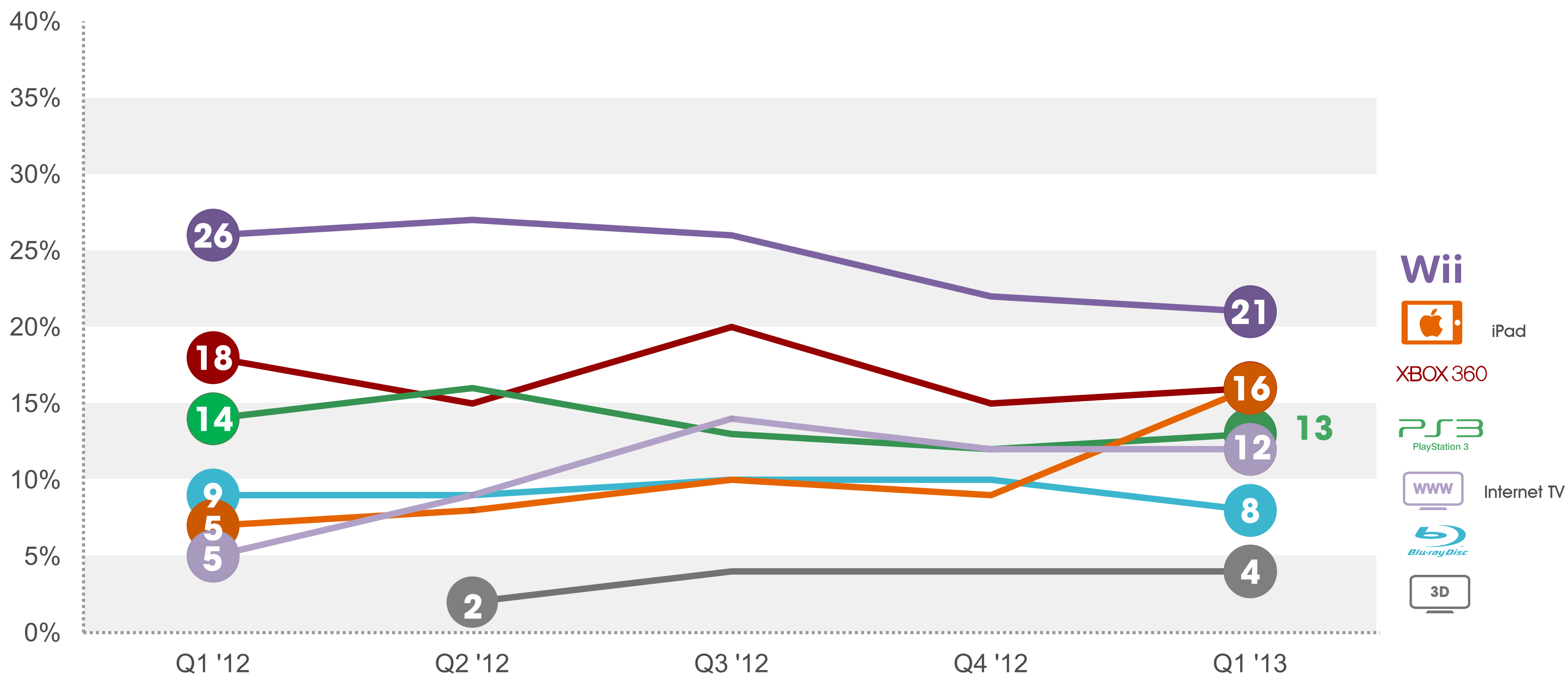


Base: 1,024 GB adults aged 15+: Quarter 1 2013

Source: Ipsos MORI

TRENDS IN EQUIPMENT OWNERSHIP IN THE HOME

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

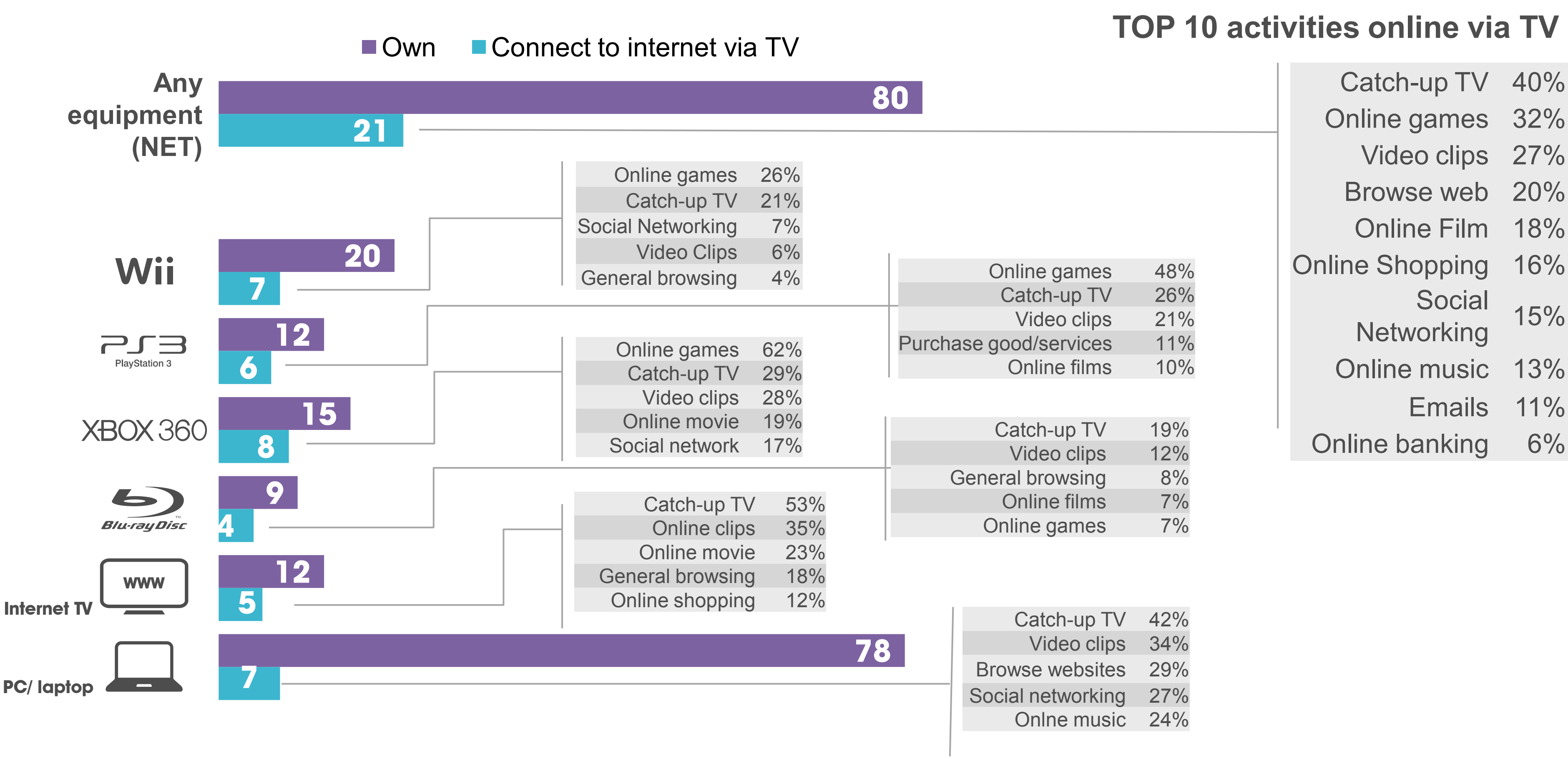


Base: circa 1,000 GB adults aged 15+ per wave

Source: Ipsos MORI

ACCESSING THE INTERNET VIA A TV

% USING EQUIPMENT TO ACCESS THE INTERNET VIA TV



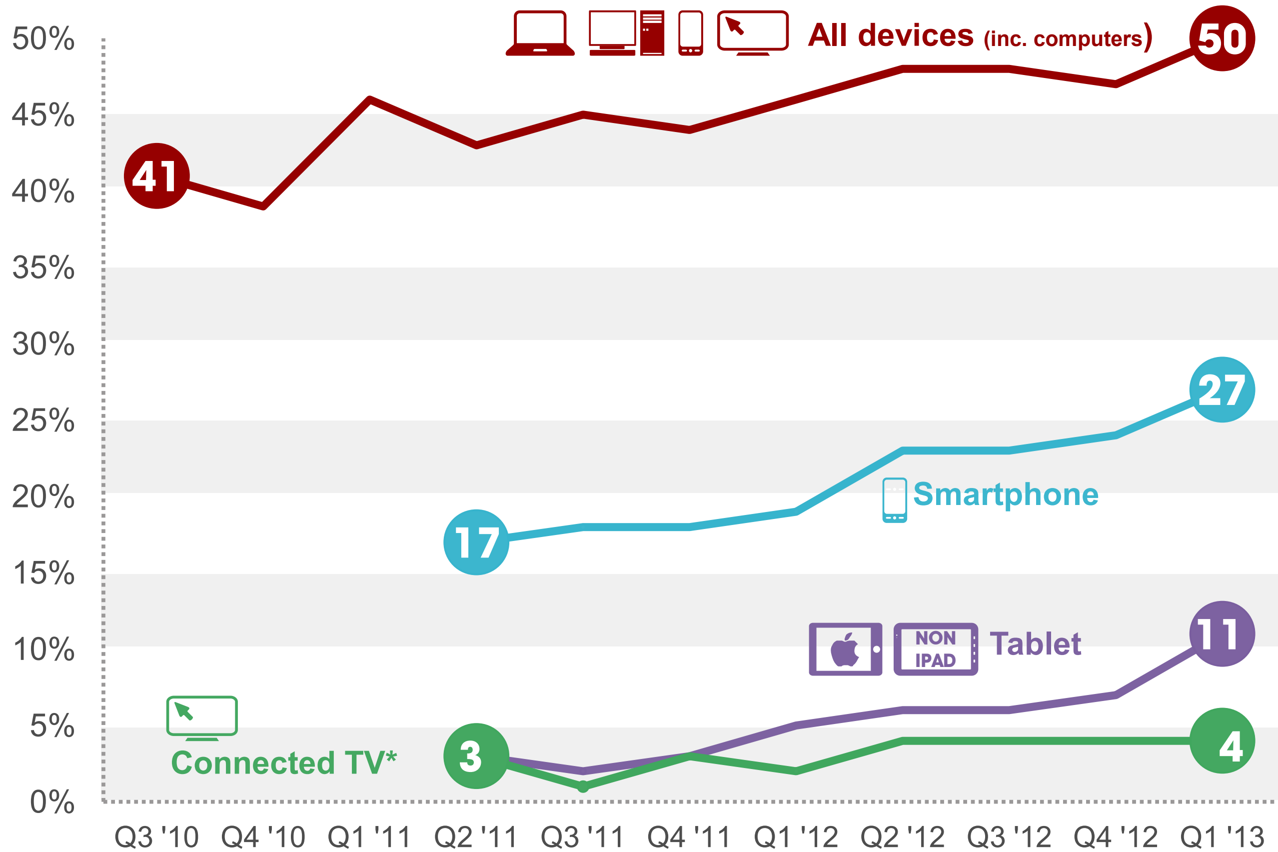
Base: 1,995 GB adults aged 15+: Q4 2012/ Q1 2013 * Blu-ray based on Q2 / Q3 / Q4 2012 / Q1 2013 *Xbox360 results are from Q4 2012

Source: Ipsos MORI

SOCIAL NETWORKING

TRENDS IN VISITING SOCIAL NETWORKING SITES

VISITING SOCIAL NETWORK SITES



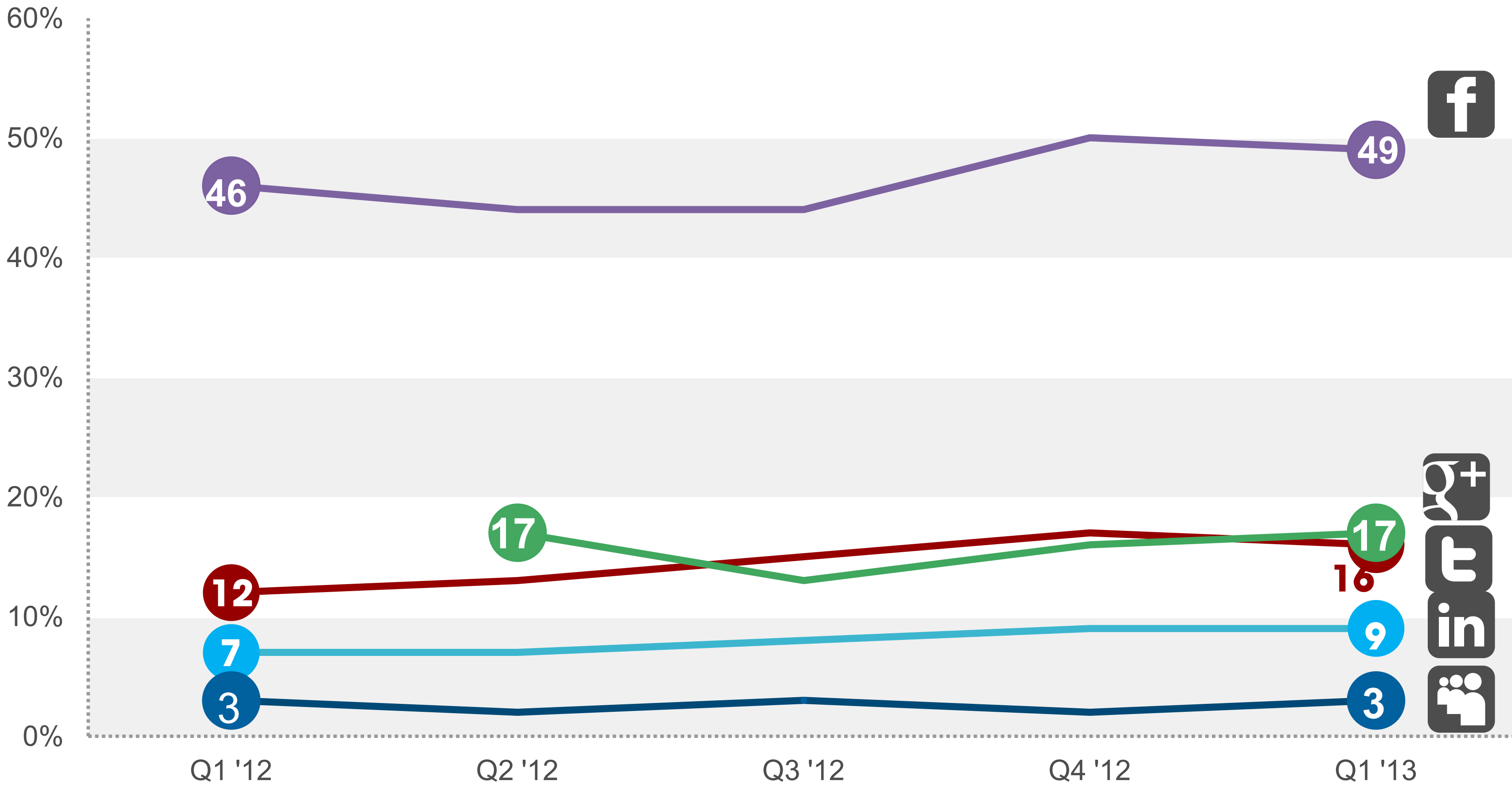
Connected TV* - Games console, web enabled TVs and PCs connected to a TV

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

Source: Ipsos MORI

TRENDS IN SOCIAL NETWORKING SITES VISITED

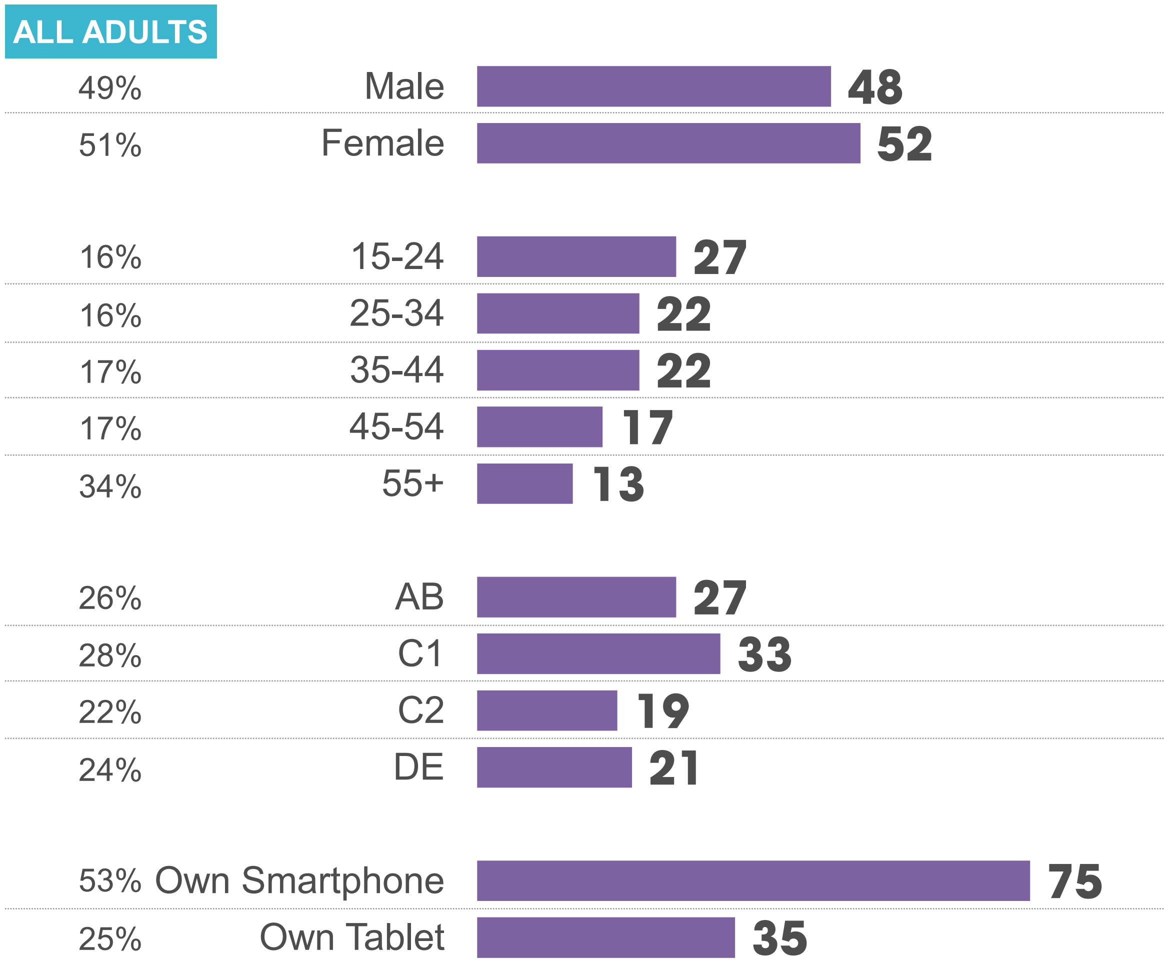
% WHICH OF THE FOLLOWING HAVE YOU VISITED IN LAST 3 MONTHS?



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

Source: Ipsos MORI

PROFILE OF FACEBOOK USERS

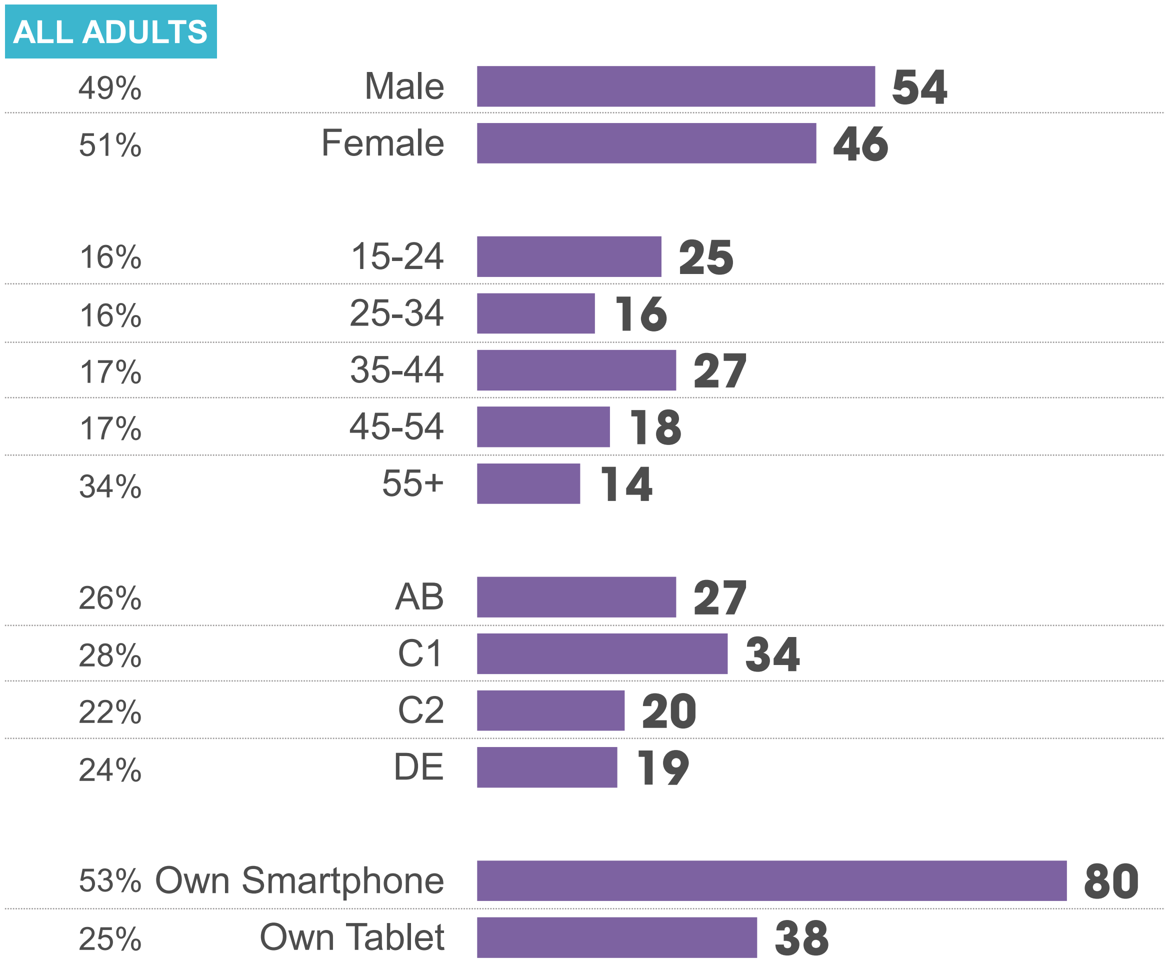


The profile of Facebook users when compared to the national population is younger. Ownership of Smartphone and tablet is also higher amongst Facebook users in comparison to the national population.

Base: All Adults (1,024) / All visiting / using Facebook in last 3 months (475) : Q1 2013

Source: Ipsos MORI

PROFILE OF GOOGLE+ USERS



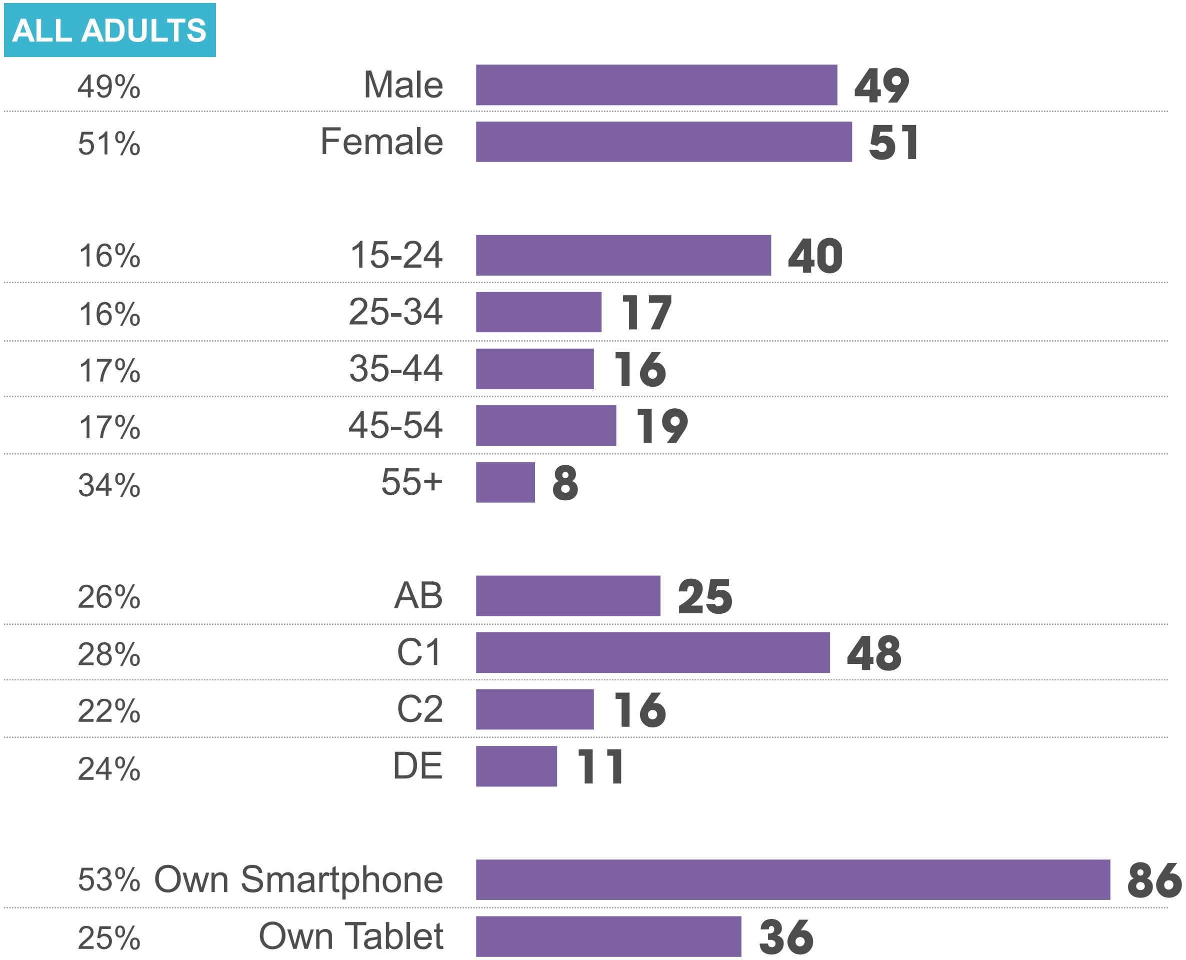
In contrast to Facebook, Google+ has captured more users ages 15-24 and 35-44 than other age groups.

Smartphone penetration is now on par with other social networks.

Base: All Adults (1,024) / All visiting / using Google+ in last 3 months (161) : Q1 2013

Source: Ipsos MORI

PROFILE OF TWITTER USERS



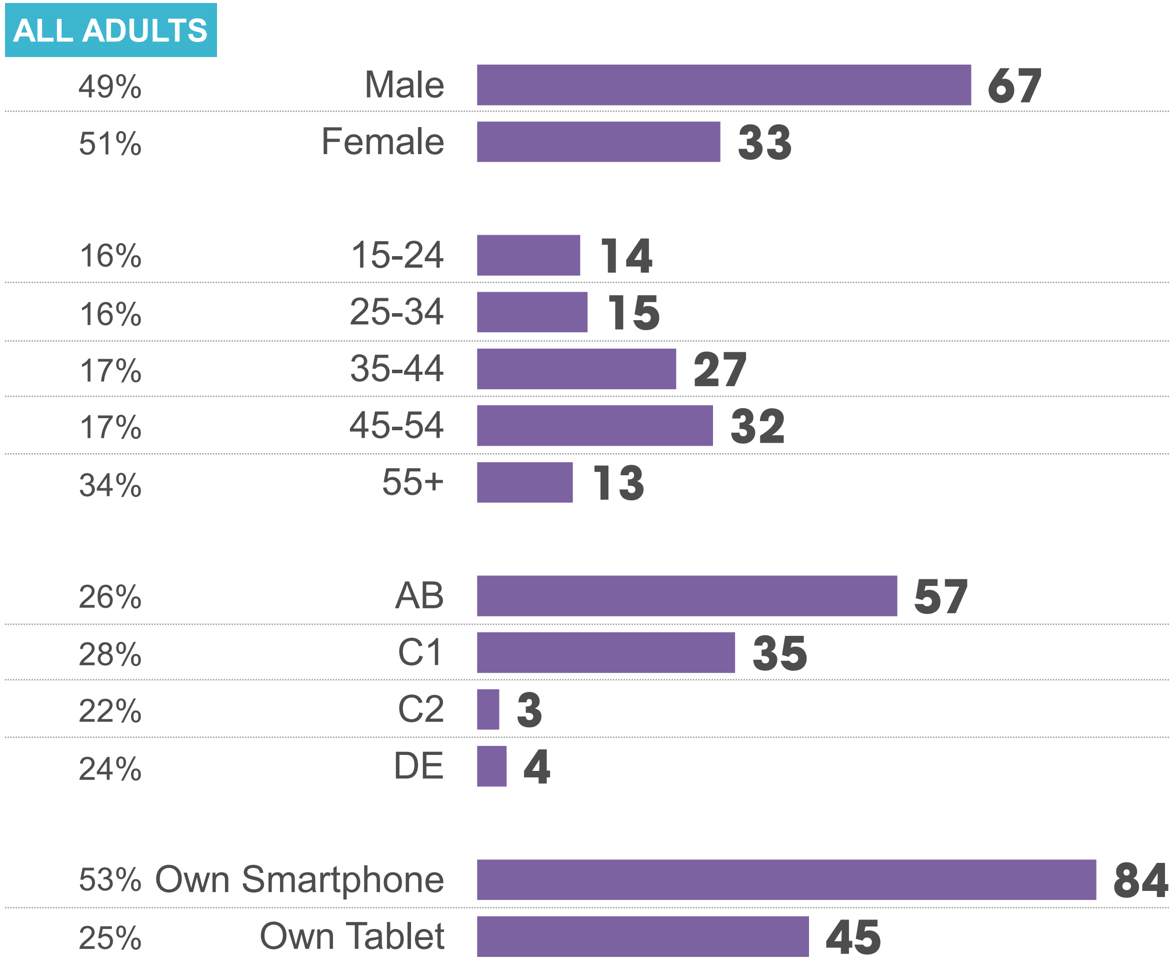
Twitter users are young: over half of them are aged under 35.

They are also more likely to be AB or C1 social grade and very mobile: 86% of them own a smartphone, 36% a tablet.

Base: All Adults (1,024) / All visiting / using Twitter in last 3 months (167) : Q1 2013

Source: Ipsos MORI

PROFILE OF LINKEDIN USERS



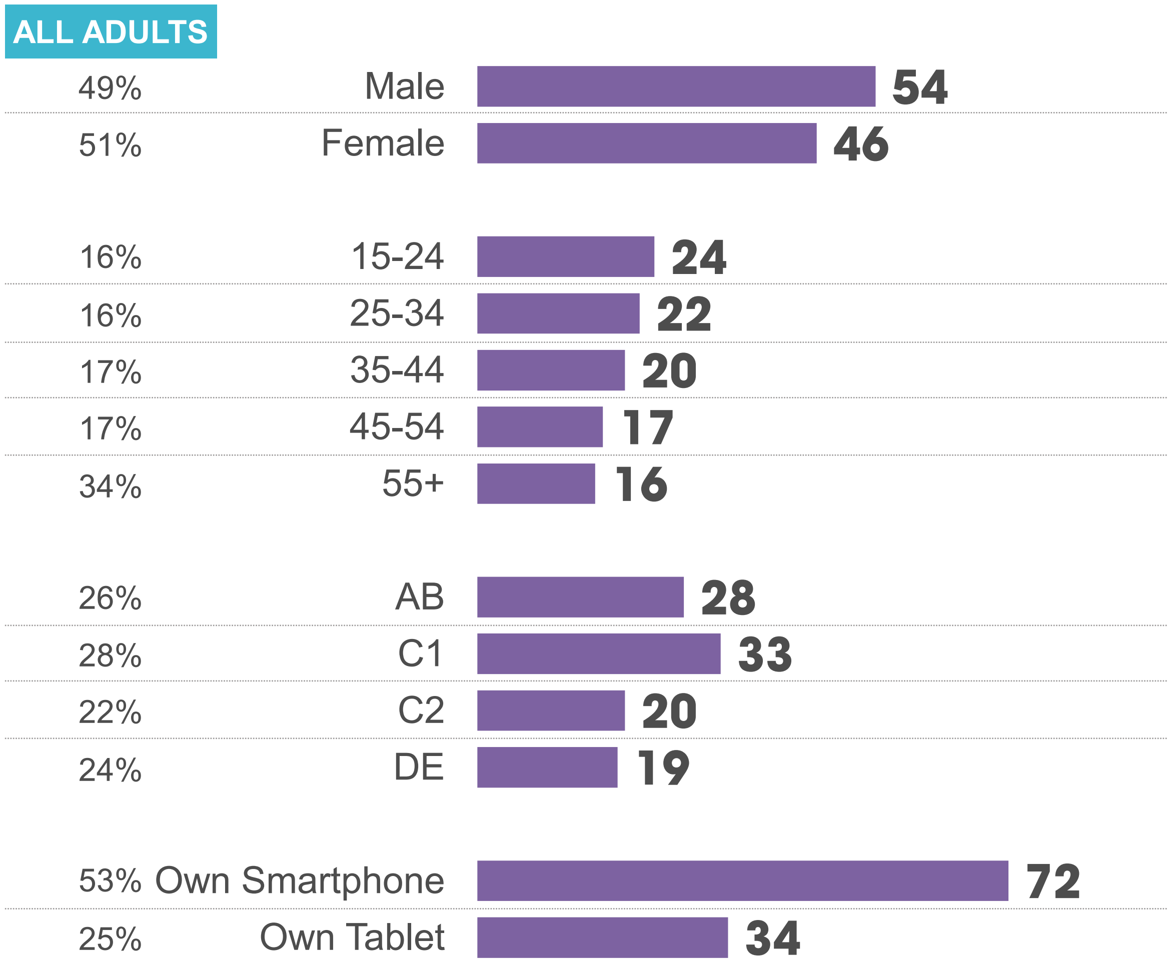
Linkedin is a more specific social network: its users skew towards males (67%), are older than on other networks (59% are between 35 and 54) and more than half are social grade AB.

Consequently, the ownership level for tablets is nearly twice that of the country average.

Base: All Adults (1,024) / All visiting / using Linkedin in last 3 months: (86) Q1 2013

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.

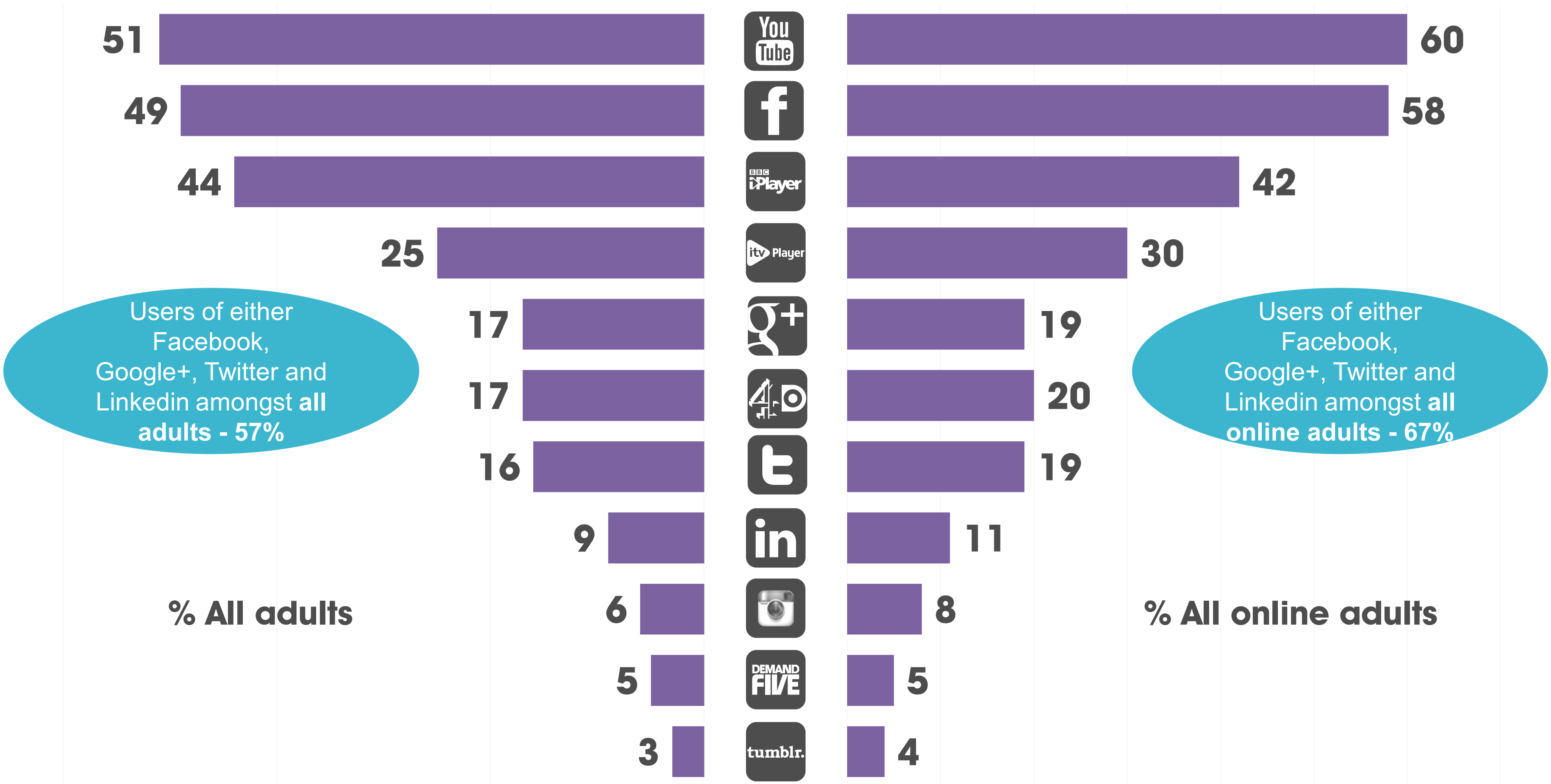
Ownership levels of smartphones and tablets are lowest compared to other social network users.

: Base: All Adults (1,024) / All visiting / using YouTube in last 3 months: (487) Q1 2013

Source: Ipsos MORI

WEBSITES VISITED OR USED IN THE LAST 3 MONTHS

% WHICH OF THE FOLLOWING HAVE YOU VISITED IN LAST 3 MONTHS – Quarter 1 2013



Base: 1,024 GB adults aged 15+: Q1 2013

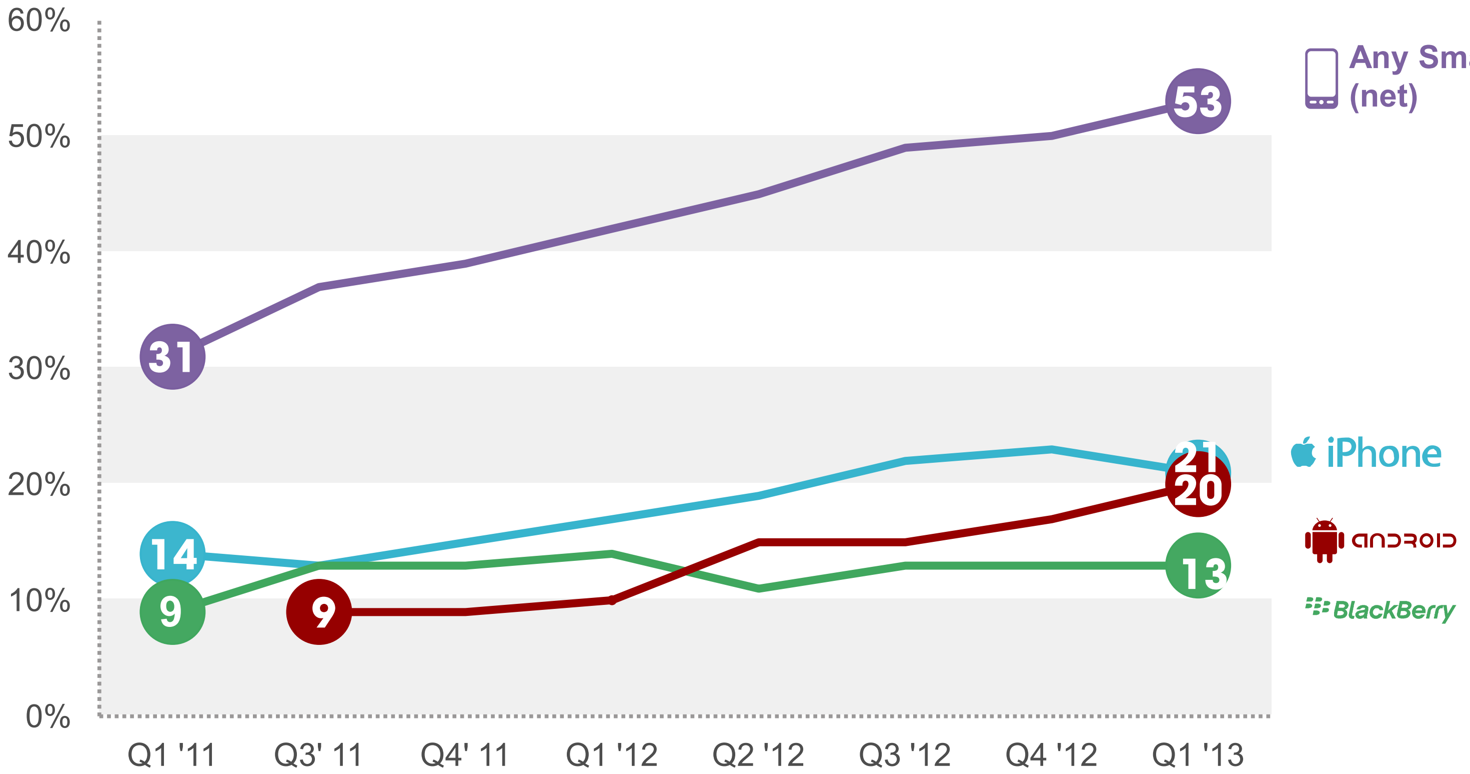
Base: 826 GB online adults aged 15+: Q1 2013

Source: Ipsos MORI

SMARTPHONE OWNERSHIP

GROWTH IN SMARTPHONES

BLACKBERRY VS. IPHONE VS. ANDROID OWNERSHIP



Customer profile

iPhone	
Males 15-34	29%
Males 35+	22%
Female 15-34	19%
Females 35+	30%

Android	
Males 15-34	27%
Males 35+	27%
Female 15-34	23%
Females 35+	23%

BlackBerry	
Males 15-34	22%
Males 35+	29%
Female 15-34	24%
Females 35+	25%

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 2012- 2013

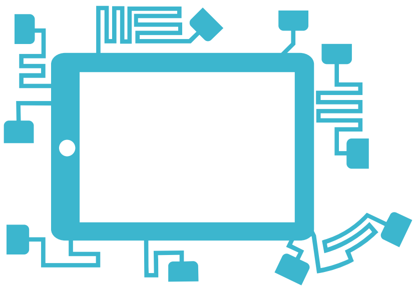
	All	15-24	25-34	35-44	45-54	55-64	65+
Males	53	74	73	68	62	31	13
Males AB	59	69	90	88	73	44	22
Males C1	61	75	83	63	72	37	13
Males C2	50	82	71	62	56	18	6
Males DE	40	65	52	52	42	11	5
Females	45	81	73	64	42	19	7
Females AB	53	86	89	82	50	33	12
Females C1	50	86	77	68	48	17	6
Females C2	42	75	67	50	41	9	6
Females DE	36	77	63	45	23	9	4

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

Base: circa 4000 GB adults aged 15+: Q2/ Q3 / Q4 2012 /Q1 2013

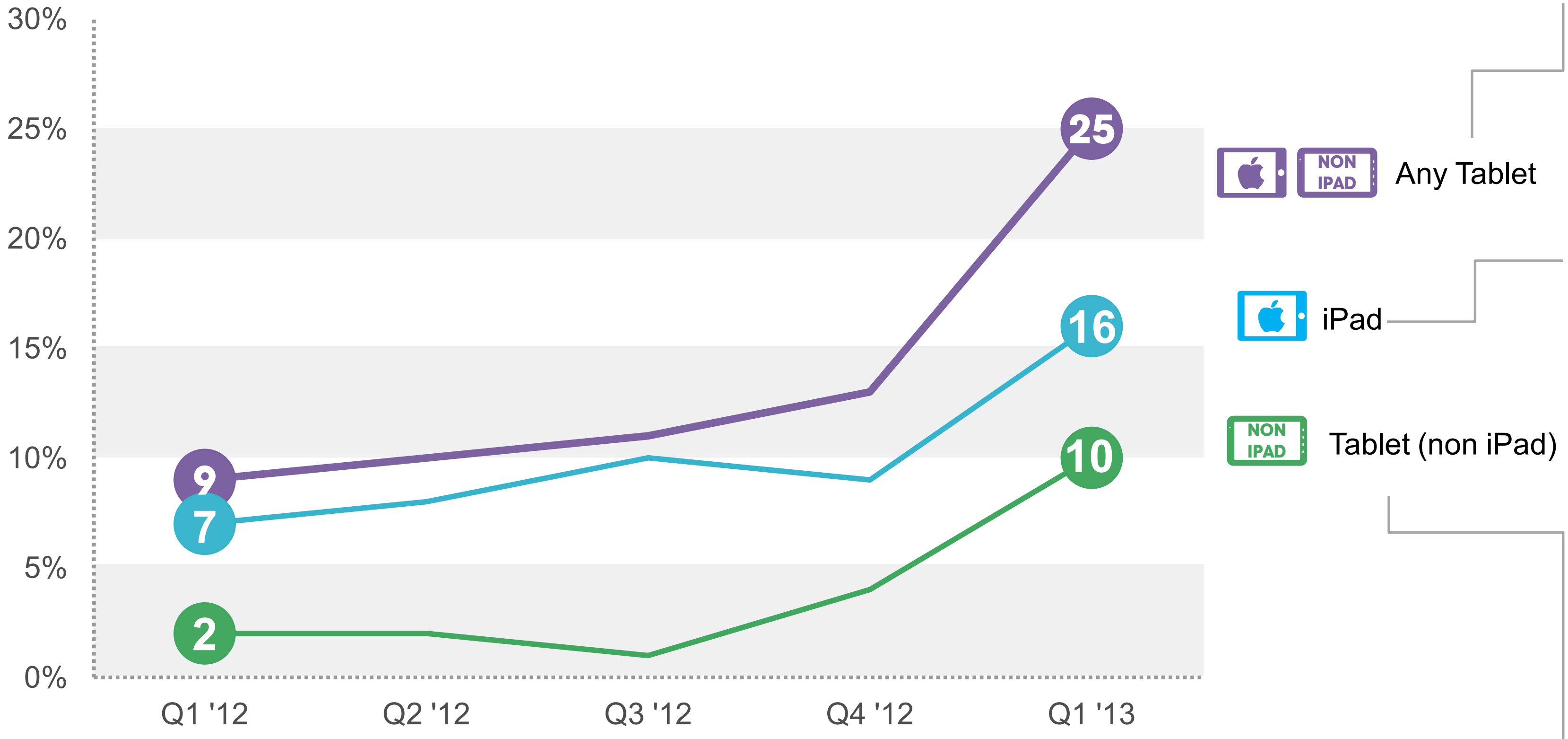
Source: Ipsos MORI

TABLET OWNERSHIP



GROWTH IN TABLETS

TABLET OWNERSHIP



Customer profile

Any Tablet	
Males 15-34	17%
Males 35+	36%
Female 15-34	15%
Females 35+	32%

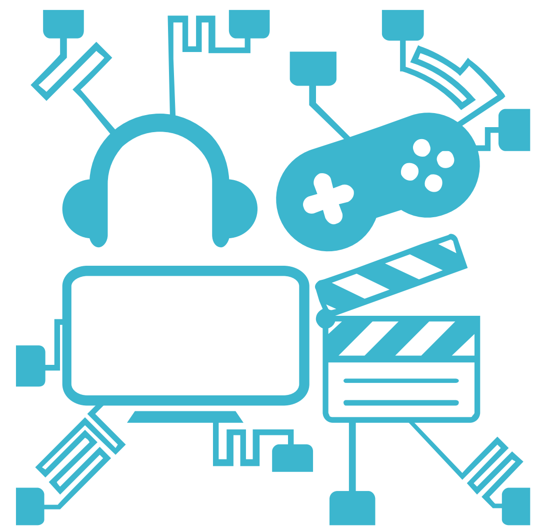
iPad	
Males 15-34	19%
Males 35+	35%
Female 15-34	15%
Females 35+	31%

Non iPad	
Males 15-34	18%
Males 35+	37%
Female 15-34	13%
Females 35+	32%

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

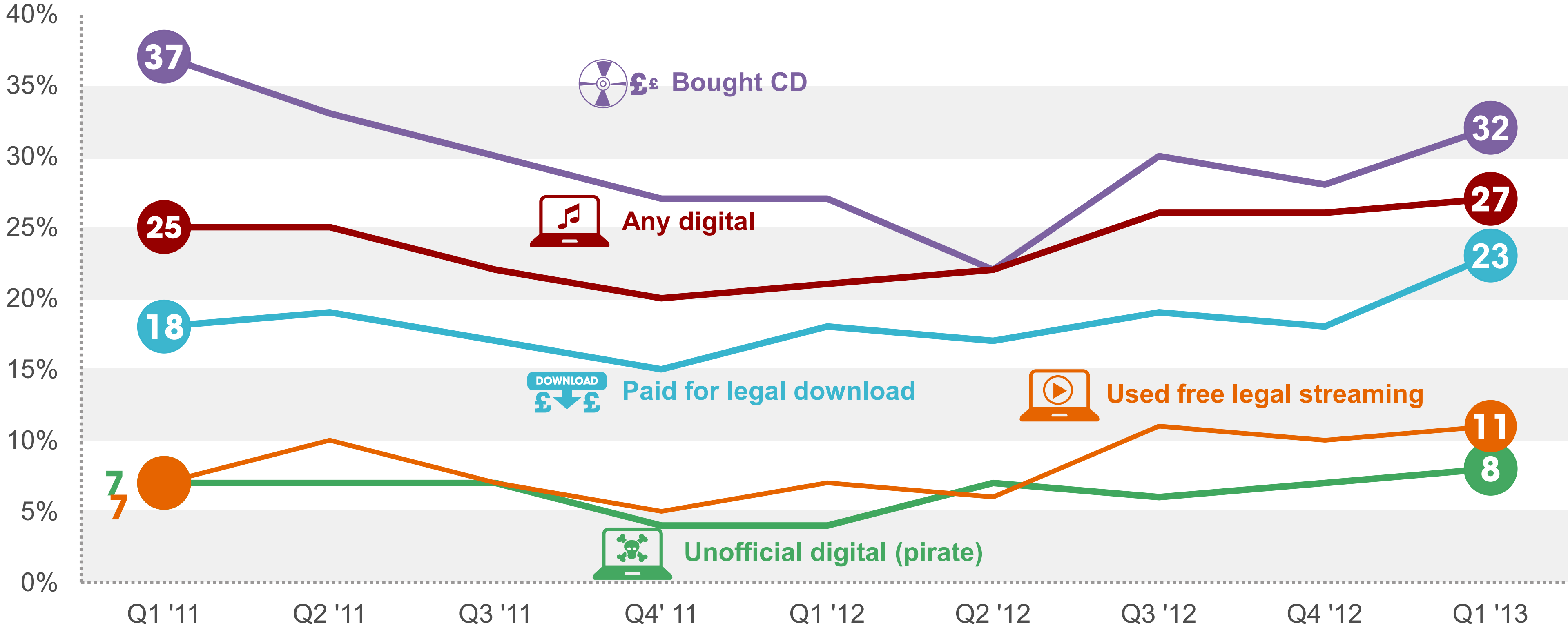
Source: Ipsos MORI

HOW WE CONSUME CONTENT - MUSIC



HOW WE CONSUME MUSIC

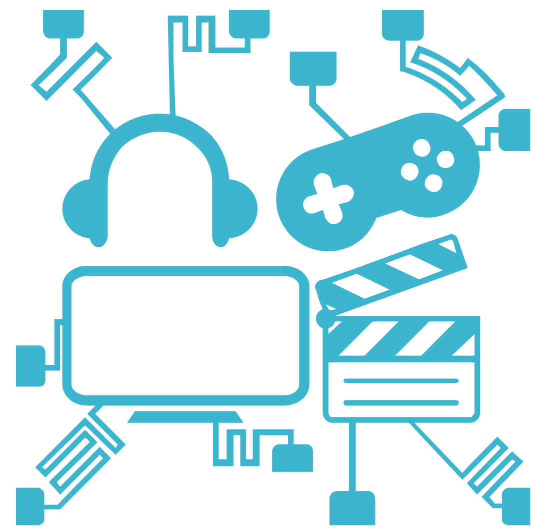
MUSIC CONSUMPTION



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

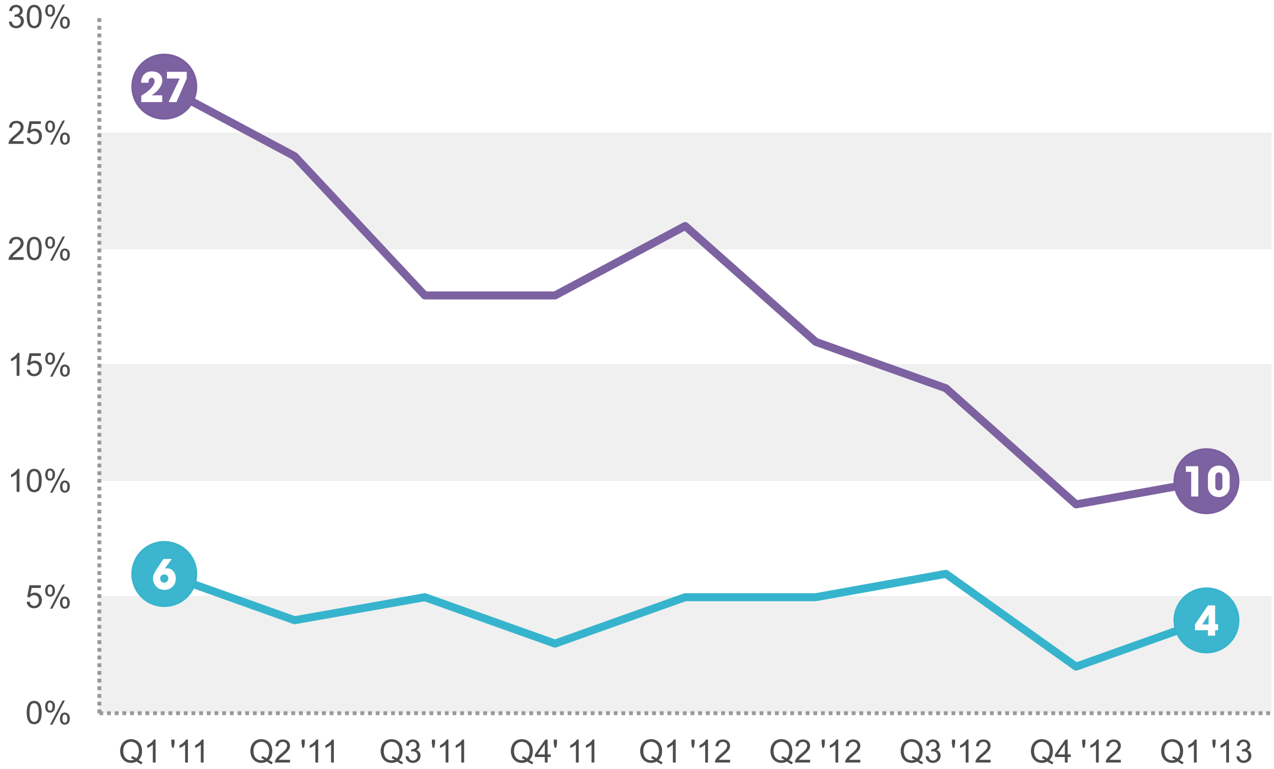
Source: Ipsos MORI

HOW WE CONSUME GAMES



HOW WE CONSUME GAMES FOR CONSOLES

GAMES CONSUMPTION



Bought a game on a disc for console

PS3 owners	31%
Xbox 360 owners	32%
Wii owners	25%

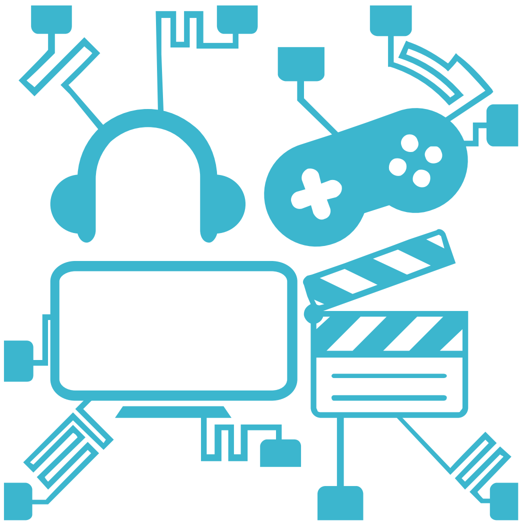
Paid to download a game direct to console

PS3 owners	11%
Xbox 360 owners	13%
Wii owners	11%

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

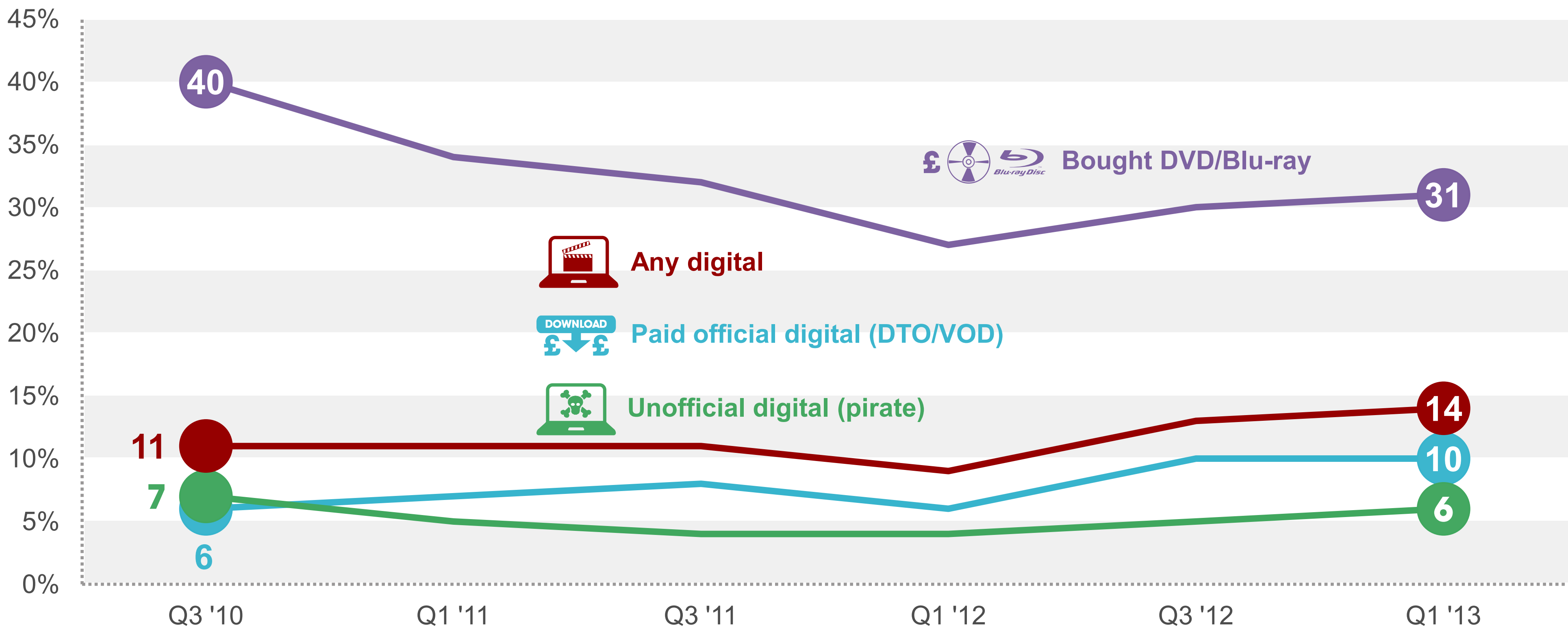
Source: Ipsos MORI

HOW WE ACCESS CONTENT – MOVIES / TV



HOW WE ACCESS MOVIES

MOVIE CONSUMPTION

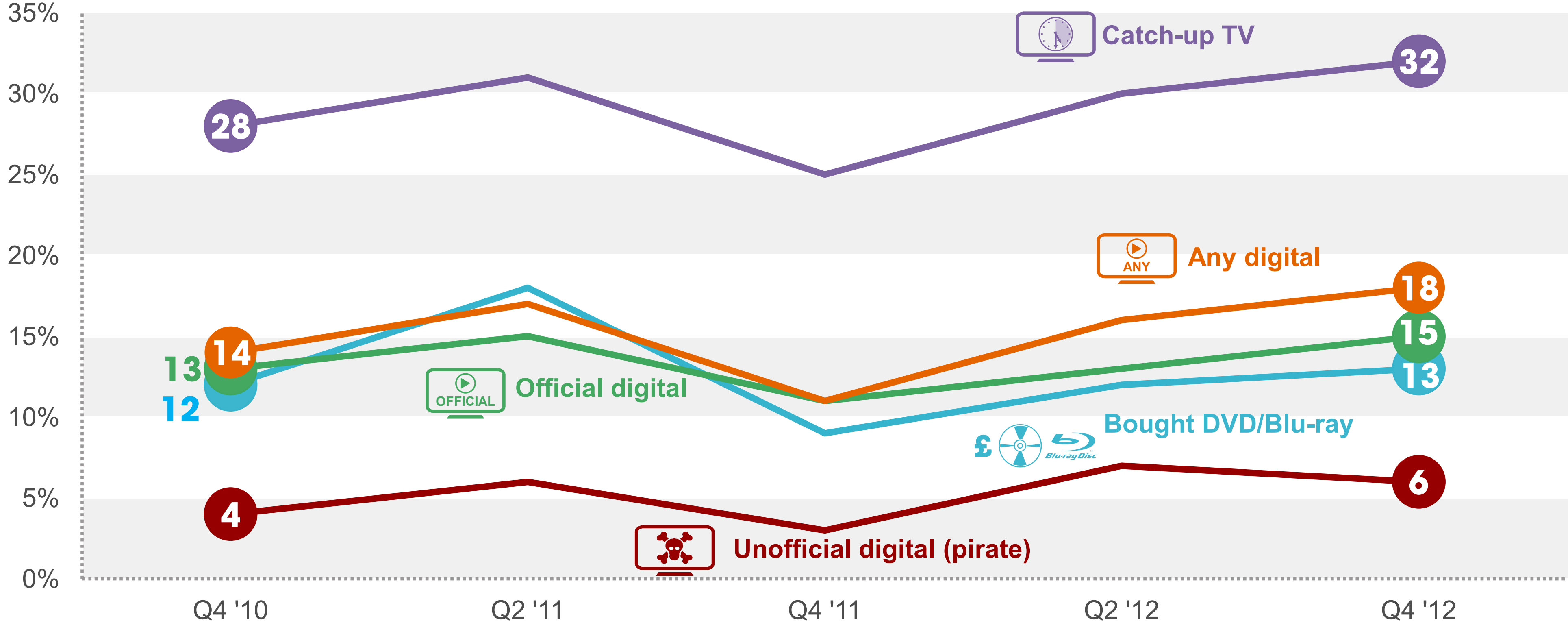


Base: circa 1,000 GB adults aged 15+ per wave

Source: Ipsos MORI

HOW WE ACCESS TV SERIES

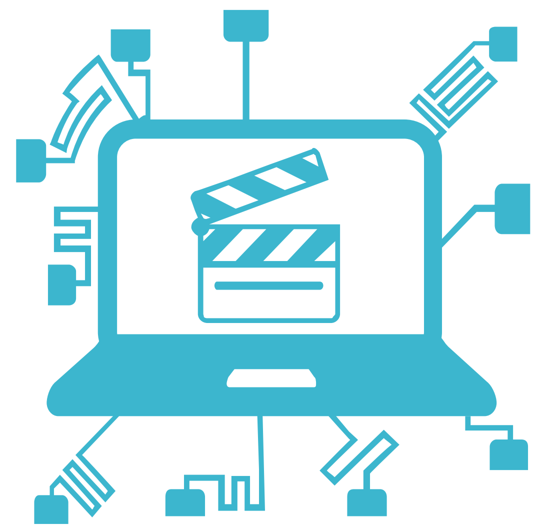
TV SERIES CONSUMPTION



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

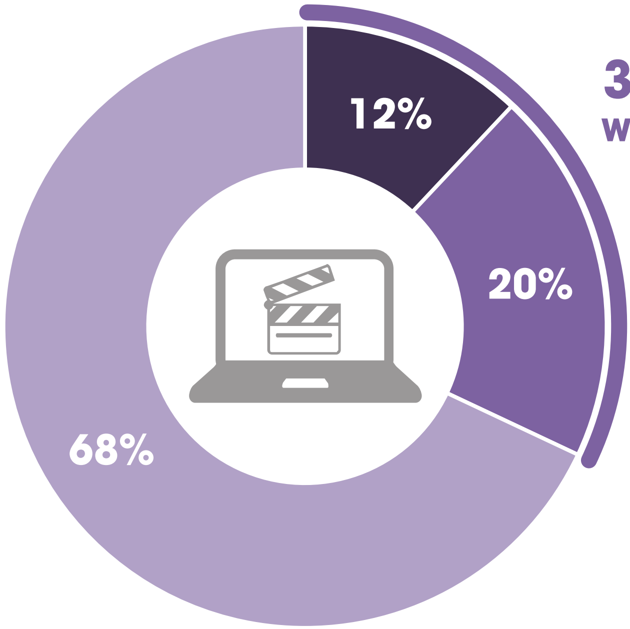
Source: Ipsos MORI

ONLINE MOVIE CONSUMPTION



ONLINE MOVIE CONSUMPTION

At an overall level, 32% of internet users watch full-length movie over internet, mainly they prefer to download or stream movies for free. Only 9% pay regularly for subscription and pay per movie follows it with 6%.



32%
Watch full-length movie

- Frequently watch full- length movies over internet
- Less frequently watch full- length movies over internet
- Don't watch full- length movie over internet

14%
Download/stream movies for free

9%
Pay regularly for subscription

6%
Pay per movie

Base: 1,024 GB adults aged 15+ Q1 2013

Source: Ipsos MORI

TECH TRACKER TECHNICAL DETAILS

Ipsos MORI interviewed a quota sample of **1024 adults aged 15+ in GB.**

The latest interviews were carried out face to face **8th – 15th February 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 exclusively to you.

FURTHER INFORMATION

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