Ipsos MediaCT
The Media, Content and Technology Research Specialists

Ipsos

TECH TRACKER
QUARTERLY RELEASE: Q2 2013

Technology Tracker

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

GB FACE TO FACE SURVEY

LATEST WAVE
QUARTER 2 2013 (Field in May)

REPRESENTATIVE SAMPLE OF
973 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 84% with 46% now accessing via a mobile.

The top activities online remain: accessing email (76%), browsing for information on hobbies (68%), researching products and services (58%) and online shopping (56%).

Connected home

Number of household with connected TV remains at 12% of GB adults has internet connected TV and among these adults 5% use the internet for various activities.

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.

Social networking

50% of GB adults access social network sites, nearly half of access via a Smartphone. 10% have access via a tablet and 2% via a TV connected to the internet.

46% of all adults have used Facebook in the past 3 months and 17% have used Twitter, Google+ (the Google social network site) usage is16% of the GB population.

Smartphones

Smartphone ownership is 52%. Ownership of iPhones is 26% and Android smartphone ownership is remained (20%) and BlackBerry decreased to (7%). iPhone ownership is highest amongst Female aged 35+ at 32%.

Tablets

Tablets are becoming an increasingly popular device and play a significant role in people's lives. Their ownership levels remains at 1 in 4 households, in line with the previous quarter.

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.

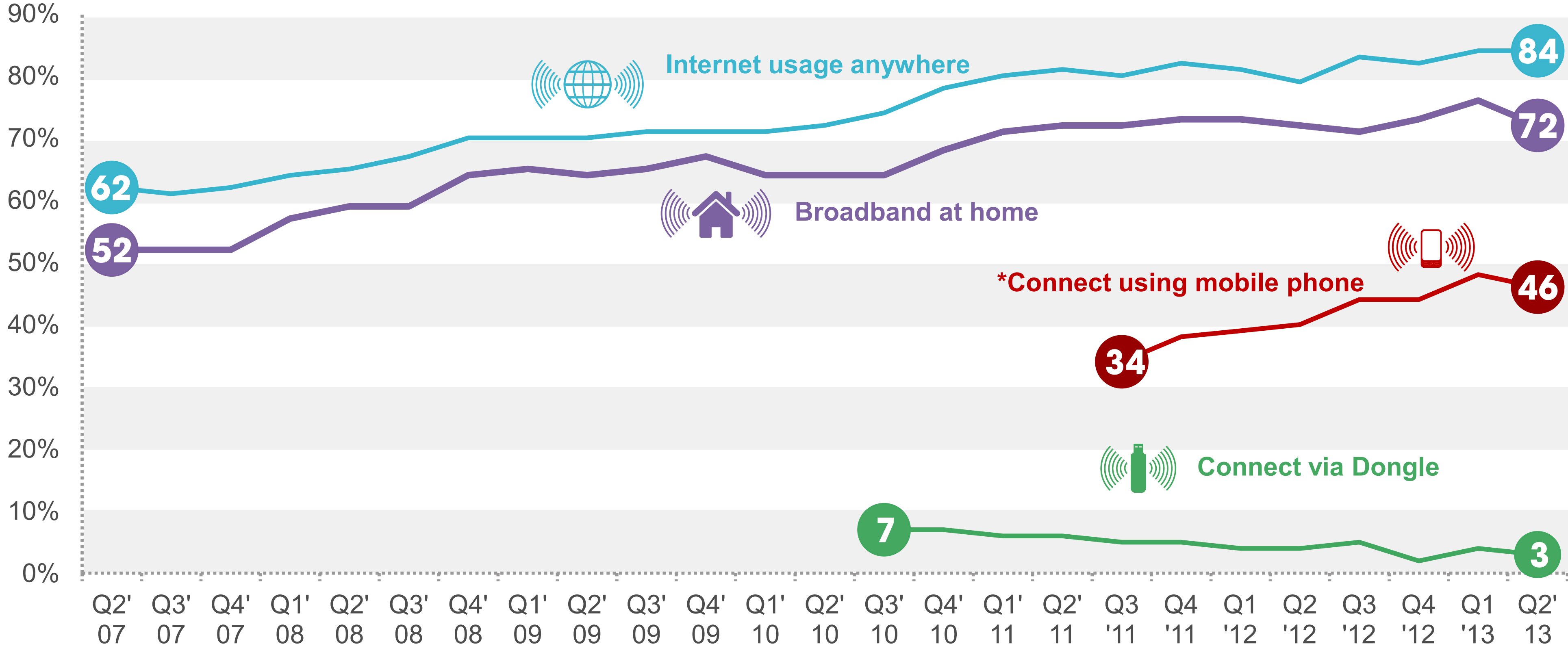
The number of adults who have bought a game on disc for a games console in the last 12 months has decreased quarter-on-quarter to 12%; with 7% paying to download an online game.

INTERNET USAGE

HOW, WHEN, WHERE

INTERNET USAGE TRENDS

INTERNET CONNECTION



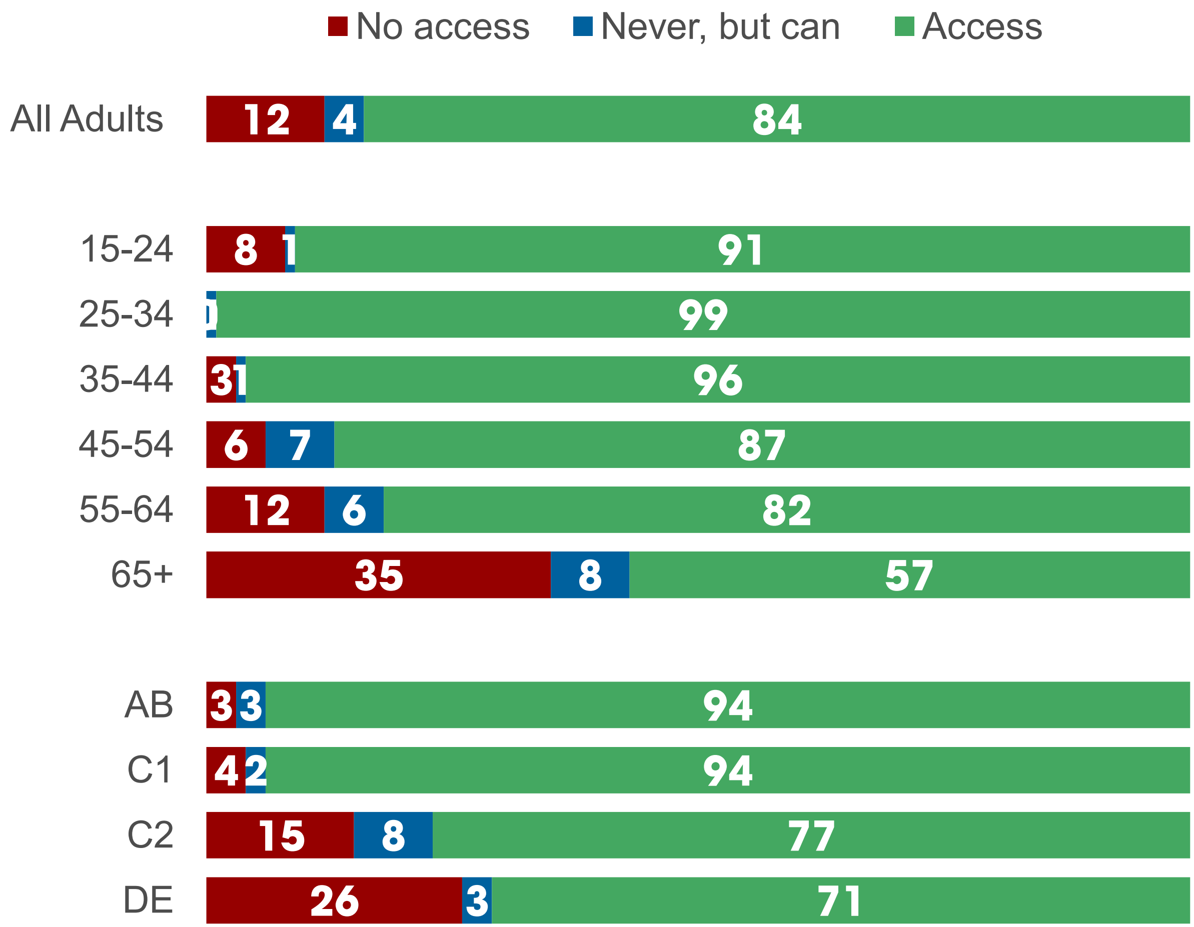
* The wording used for measuring 'internet connection by mobile phone' has been updated which means earlier data is not strictly comparable and is therefore not shown

Base: circa 2000 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

% ACCESS TO THE INTERNET: Quarter 2 2013



In Quarter 2 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 65 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: circa 1000 GB adults aged 15+: Quarter 2 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	86	97	96	95	89	79	62
Males AB	94	93	100	100	100	90	84
Males C1	93	99	97	98	95	89	73
Males C2	83	99	97	96	83	76	42
Males DE	72	94	92	82	73	48	28
Females	81	92	95	93	90	77	50
Females AB	92	100	100	99	99	96	72
Females C1	87	99	97	99	92	87	58
Females C2	77	87	96	92	92	52	36
Females DE	65	85	89	79	70	54	29

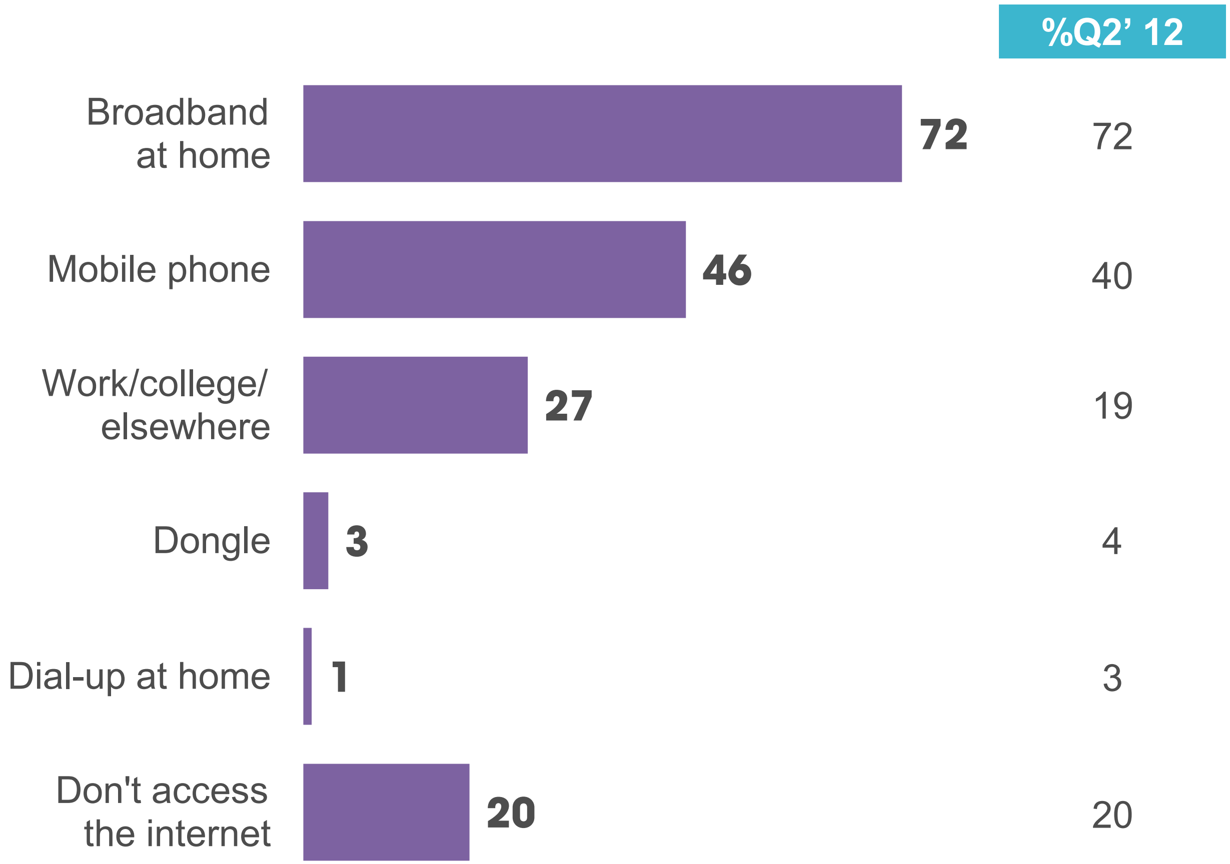
0-49% 50-79% 80-100%

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

Source: Ipsos MORI

HOW PEOPLE CONNECT TO THE INTERNET

% ACCESS TO THE INTERNET: Quarter 2 2013



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

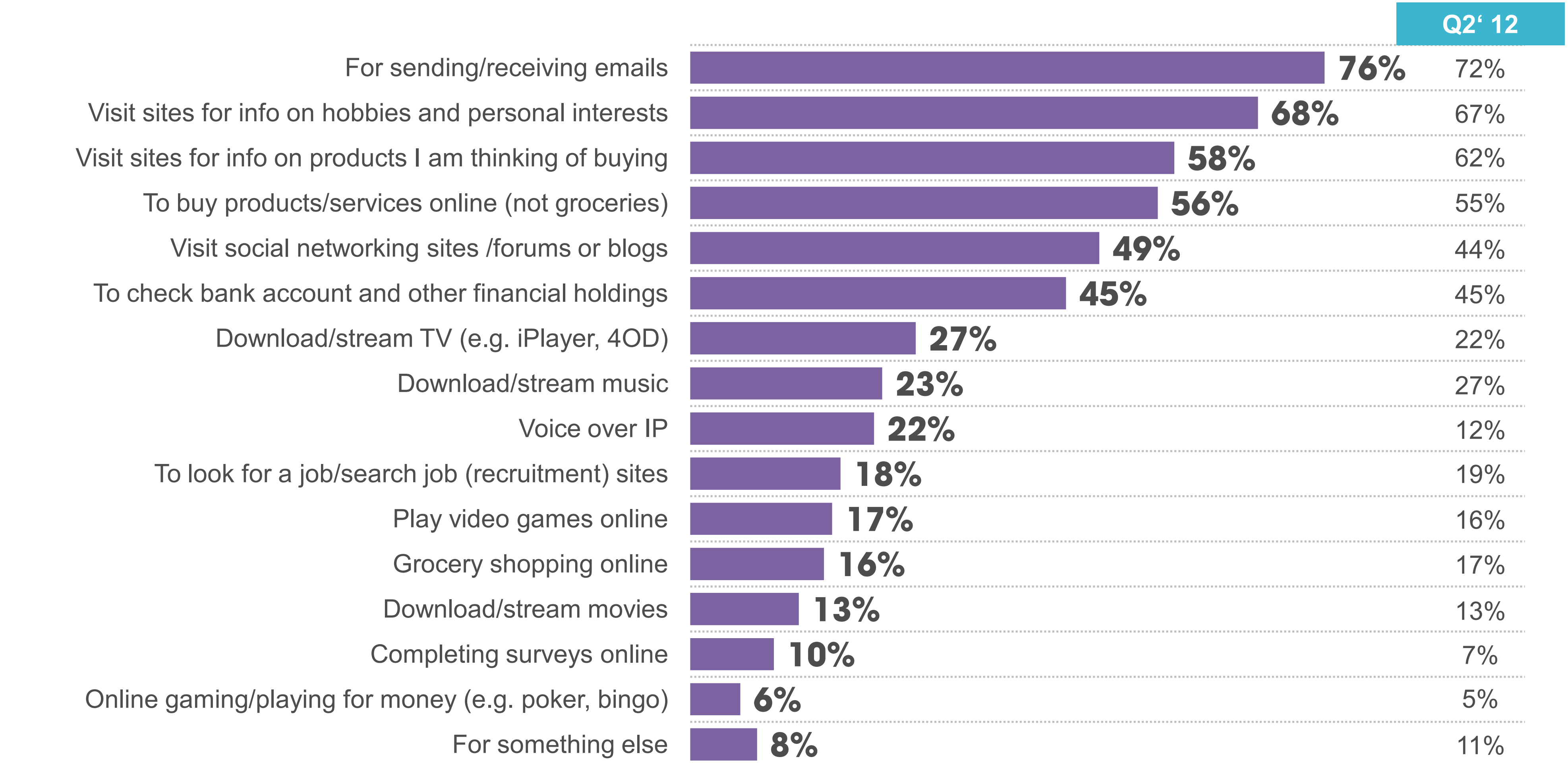
As the proportion of smartphone owners has increased further, 46% now access the internet via their mobile phone and only 1% access via dial-up.

Base: circa 1000 GB adults aged 15+: Quarter 2 2013

Source: Ipsos MORI

WAYS THE INTERNET IS USED

USE OF THE INTERNET IN THE PAST 3 MONTHS: Quarter 2 2013

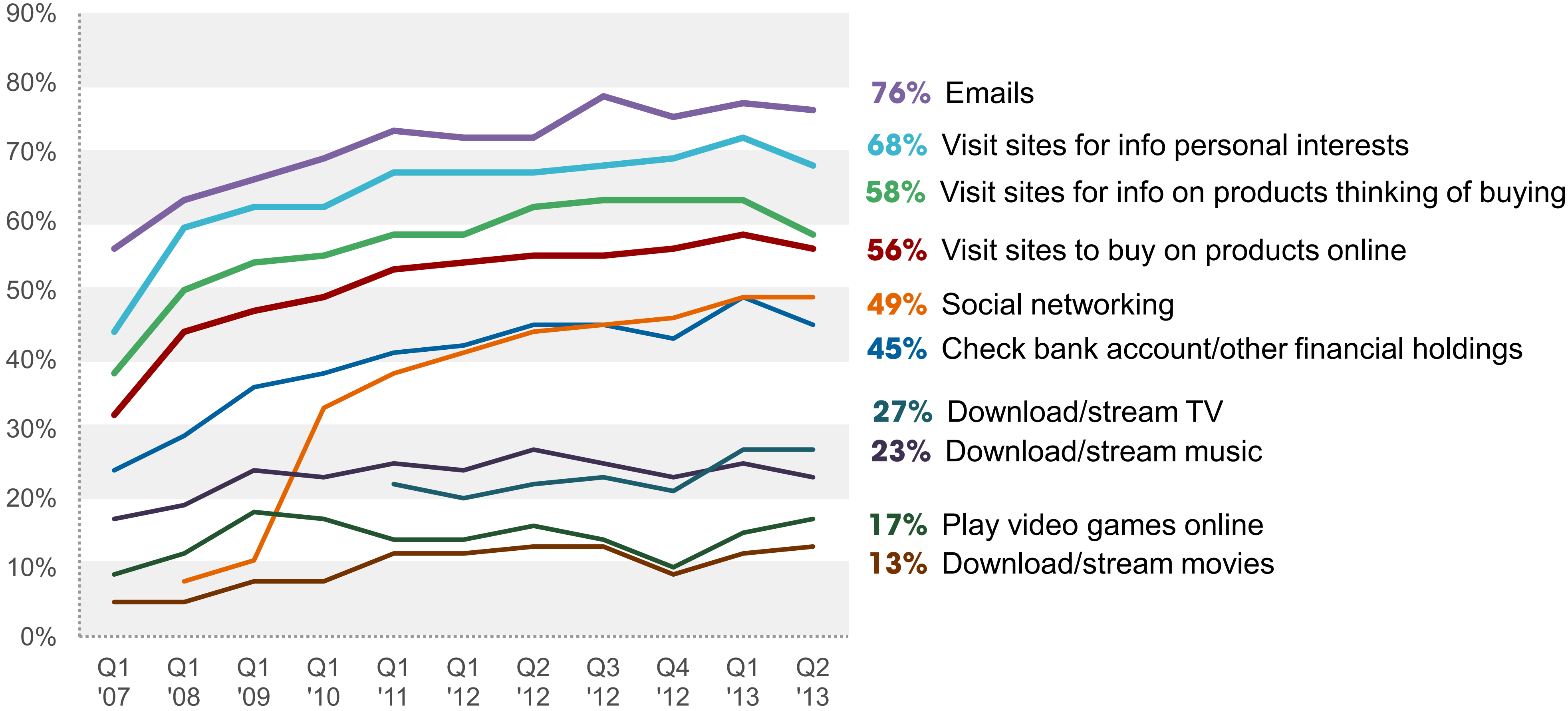


Base: circa 1000 GB adults aged 15+: Quarter 2 2013

Source: Ipsos MORI

CHANGING WAYS THE INTERNET IS USED

USE OF THE INTERNET IN THE PAST 3 MONTHS



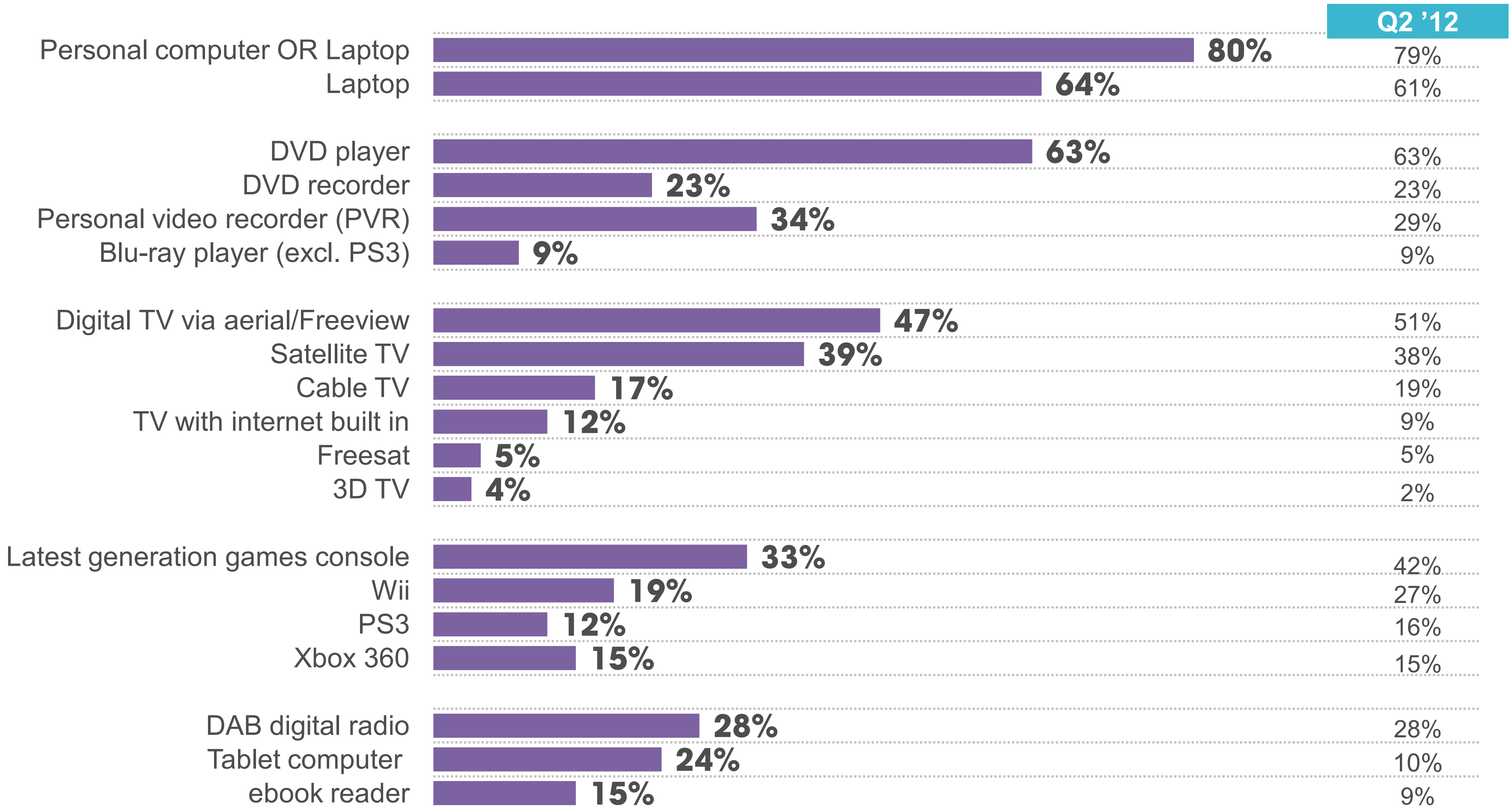
Base: circa 2000 interviews per wave until Quarter 1 2010, circa 1000 GB adults aged 15+ per wave thereafter

Source: Ipsos MORI

CONNECTED HOME

EQUIPMENT IN THE HOME

WHICH OF THE FOLLOWING DO YOU OWN/HAVE IN YOUR HOUSEHOLD? Quarter 2 2013

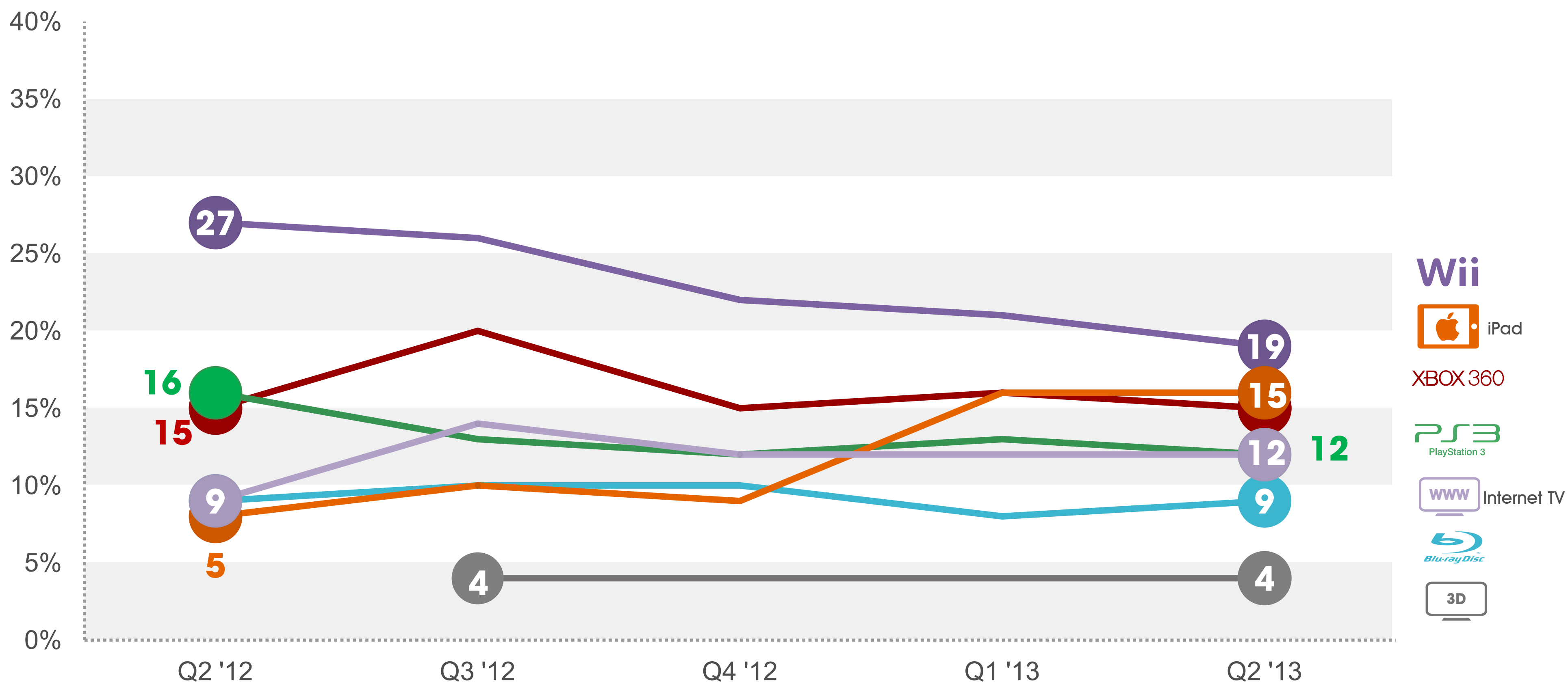


Base: circa 1000 GB adults aged 15+: Quarter 2 2013

Source: Ipsos MORI

TRENDS IN EQUIPMENT OWNERSHIP IN THE HOME

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

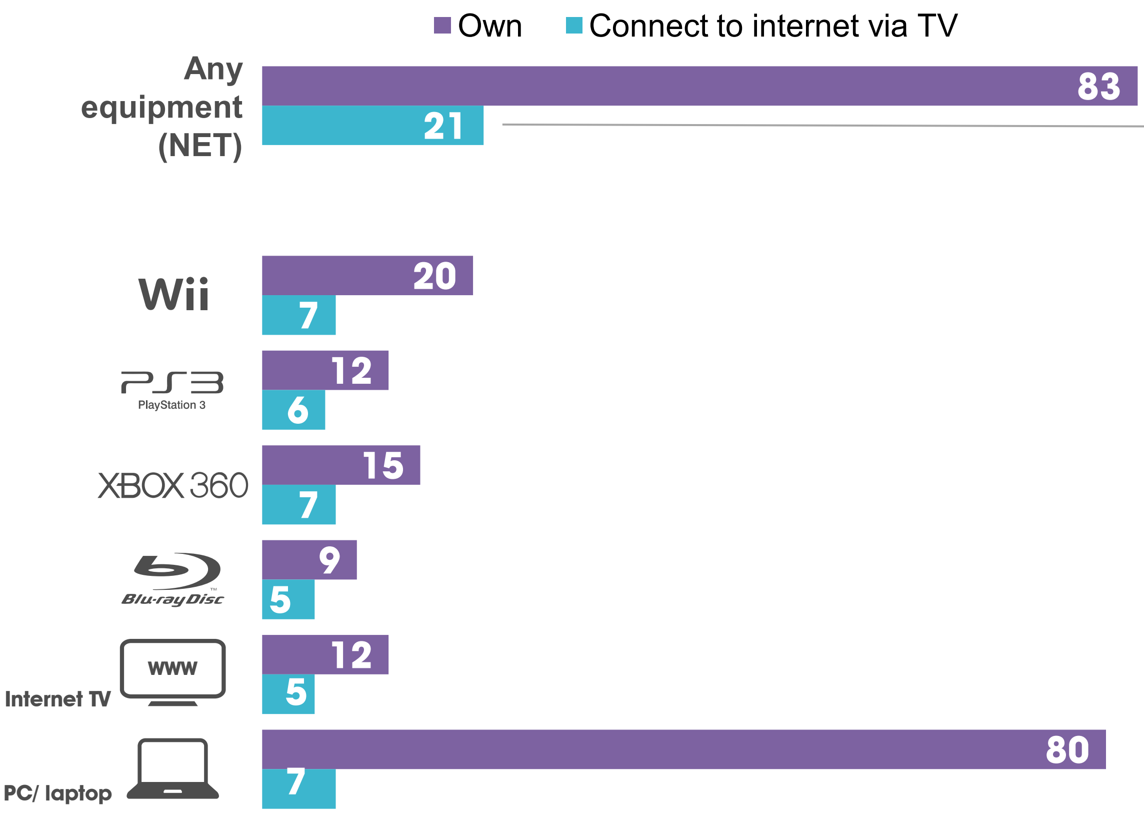


Base: circa 1000 GB adults aged 15+ per wave

Source: Ipsos MORI

ACCESSING THE INTERNET VIA A TV

% USING EQUIPMENT TO ACCESS THE INTERNET VIA TV



TOP 10 activities online via TV

Catch-up TV	38%
Online games	34%
Video clips	25%
Browse web	17%
Online Film	17%
Online Shopping	14%
Social Networking	11%
Online music	10%
Emails	9%
Online banking	6%

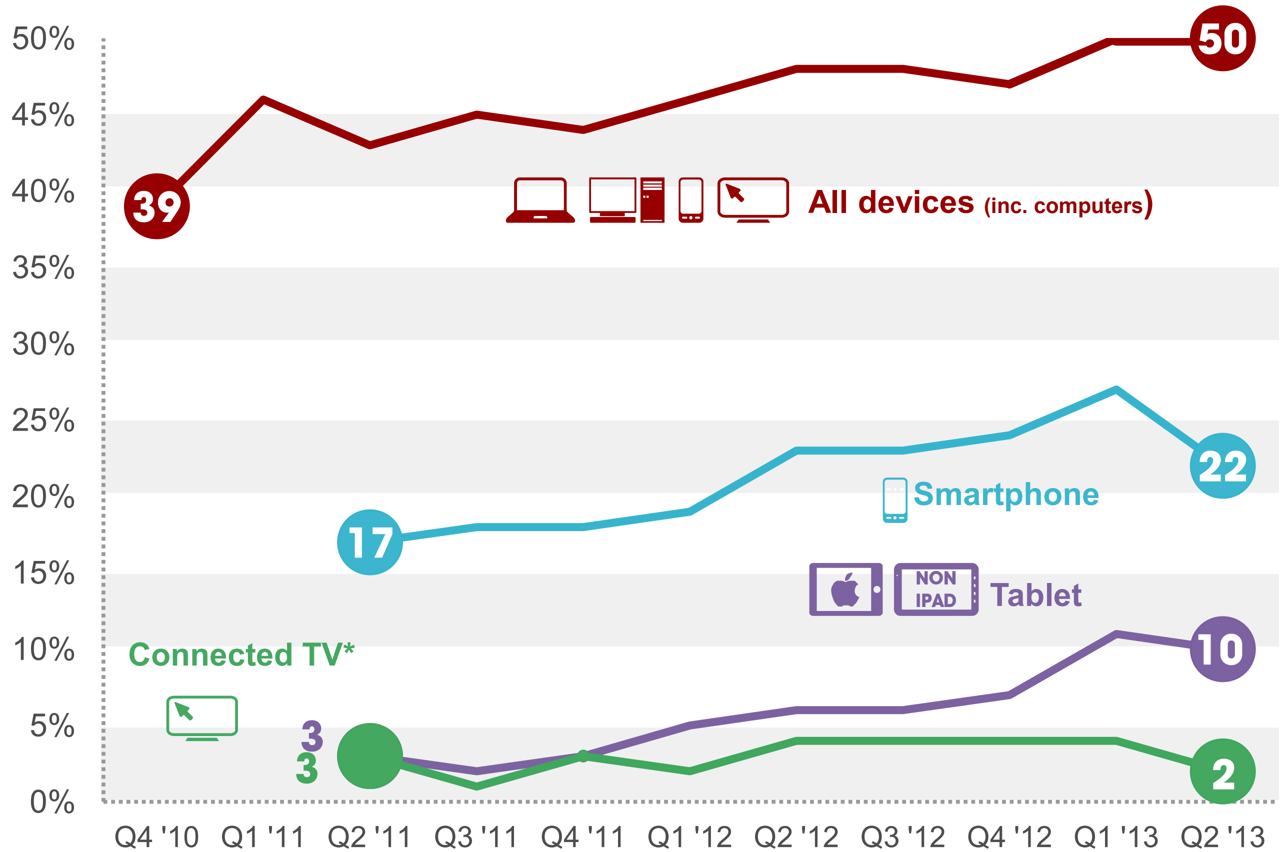
Base: circa 2000 GB adults aged 15+: Q1/Q2 2013

Source: Ipsos MORI

SOCIAL NETWORKING

TRENDS IN VISITING SOCIAL NETWORKING SITES

VISITING SOCIAL NETWORK SITES



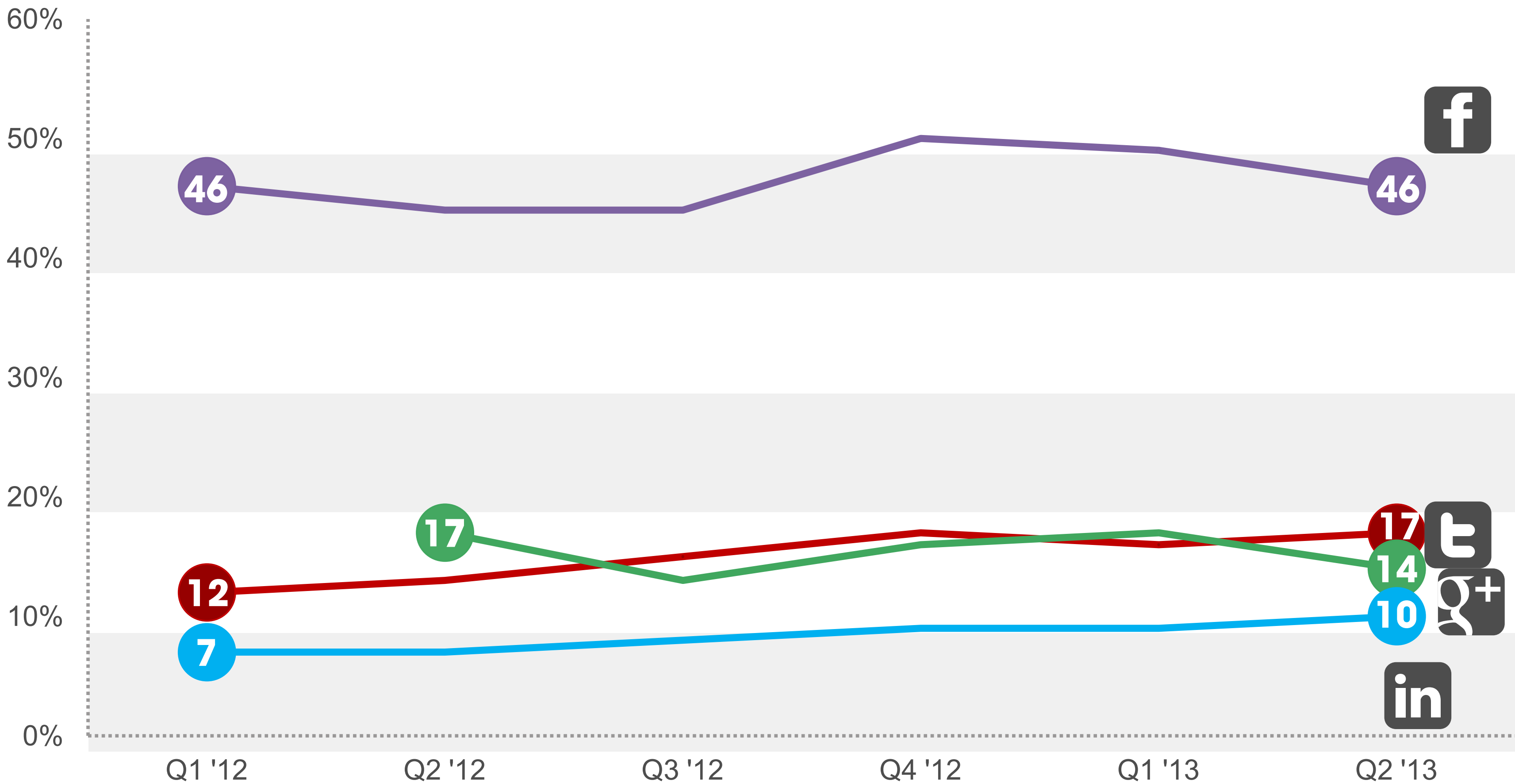
Connected TV* - Games console, web enabled TVs and PCs connected to a TV

Base: circa 1000 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 1000 GB adults aged 15+ per wave

Source: Ipsos MORI

PROFILE OF FACEBOOK USERS

ALL ADULTS		Facebook users
48%	Male	48
52%	Female	52
16%	15-24	25
16%	25-34	24
17%	35-44	22
17%	45-54	16
34%	55+	13
26%	AB	26
28%	C1	30
22%	C2	22
24%	DE	22
52%	Own Smartphone	76
24%	Own Tablet	34

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: circa GB adults (1000) / All visiting / using Facebook in last 3 months (449) : Q2 2013

Source: Ipsos MORI

PROFILE OF GOOGLE+ USERS

ALL ADULTS		
48%	Male	49
52%	Female	51
16%	15-24	23
16%	25-34	28
17%	35-44	21
17%	45-54	16
34%	55+	12
26%	AB	24
28%	C1	30
22%	C2	27
24%	DE	19
52%	Own Smartphone	75
24%	Own Tablet	34

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

Smartphone penetration is now on par with other social networks.

Base: circa GB adults (1000) / All visiting / using Google+ in last 3 months (136) : Q2 2013

Source: Ipsos MORI

PROFILE OF TWITTER USERS

ALL ADULTS		
48%	Male	53
52%	Female	47
16%	15-24	31
16%	25-34	26
17%	35-44	25
17%	45-54	7
34%	55+	12
26%	AB	32
28%	C1	36
22%	C2	16
24%	DE	16
52%	Own Smartphone	90
24%	Own Tablet	43

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: 90% of them own a smartphone, 43% a tablet.

Base: circa GB adults (1000) / All visiting / using Twitter in last 3 months (163) : Q2 2013

Source: Ipsos MORI

PROFILE OF LINKEDIN USERS

ALL ADULTS		
48%	Male	62
52%	Female	38
16%	15-24	9
16%	25-34	14
17%	35-44	36
17%	45-54	23
34%	55+	18
26%	AB	60
28%	C1	26
22%	C2	9
24%	DE	5
52%	Own Smartphone	72
24%	Own Tablet	50

Linkedin is a more specific social network: its users skew towards males (62%), are older than on other networks (36% are between 35 and 54) and more than half are social grade AB.

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

Base: circa GB adults (1000) / All visiting / using Linkedin in last 3 months: (98) Q2 2013

Source: Ipsos MORI

PROFILE OF YOUTUBE USERS

ALL ADULTS		
48%	Male	57
52%	Female	43
16%	15-24	25
16%	25-34	26
17%	35-44	23
17%	45-54	15
34%	55+	11
26%	AB	29
28%	C1	34
22%	C2	18
24%	DE	19
52%	Own Smartphone	75
24%	Own Tablet	38

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

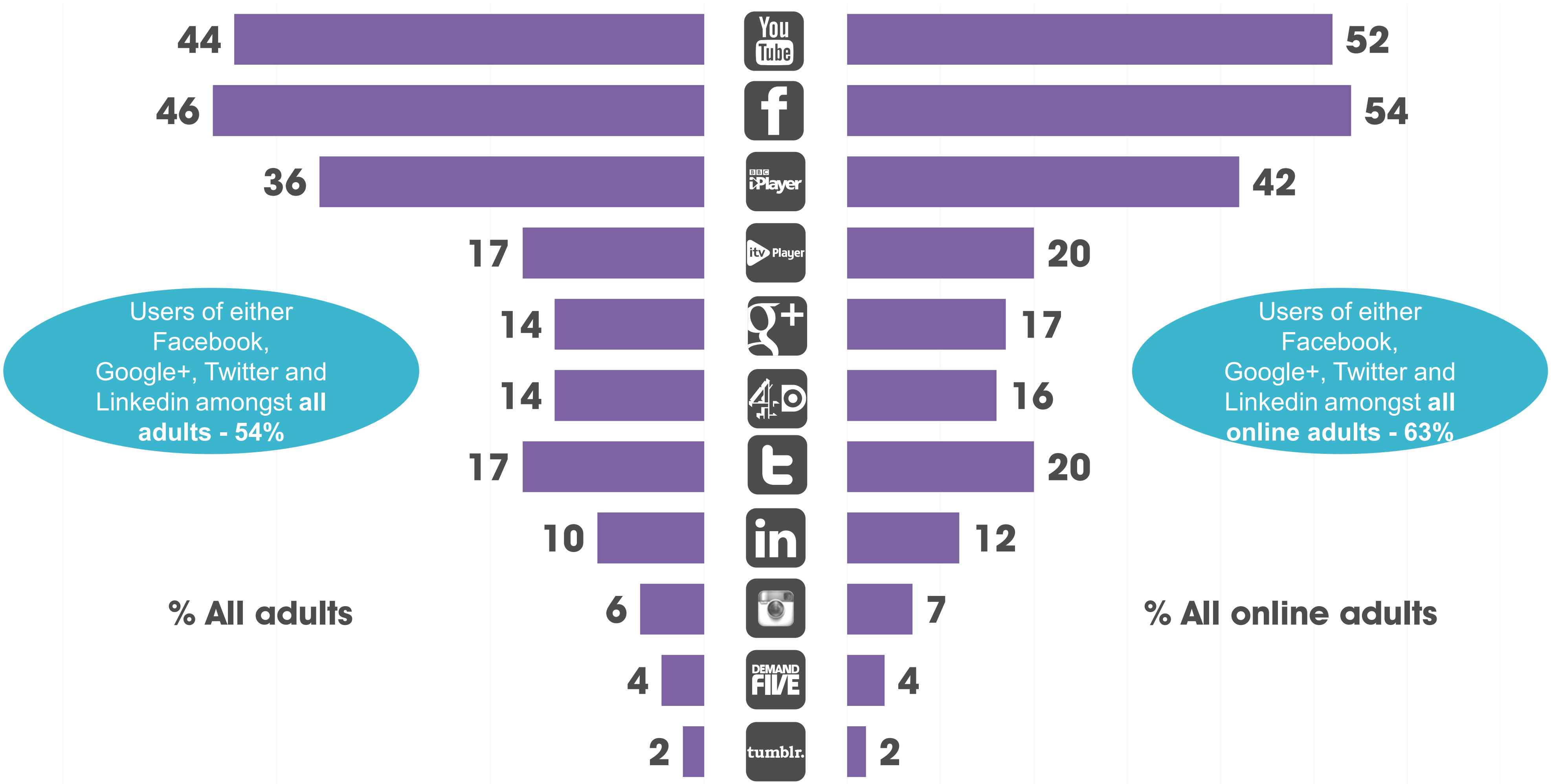
Ownership levels of smartphones and tablets are higher than average.

: Base: circa GB adults (1000) / All visiting / using YouTube in last 3 months: (425) Q2 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 2 2013



Base: circa GB adults 1000 adults aged 15+: Q2 2013

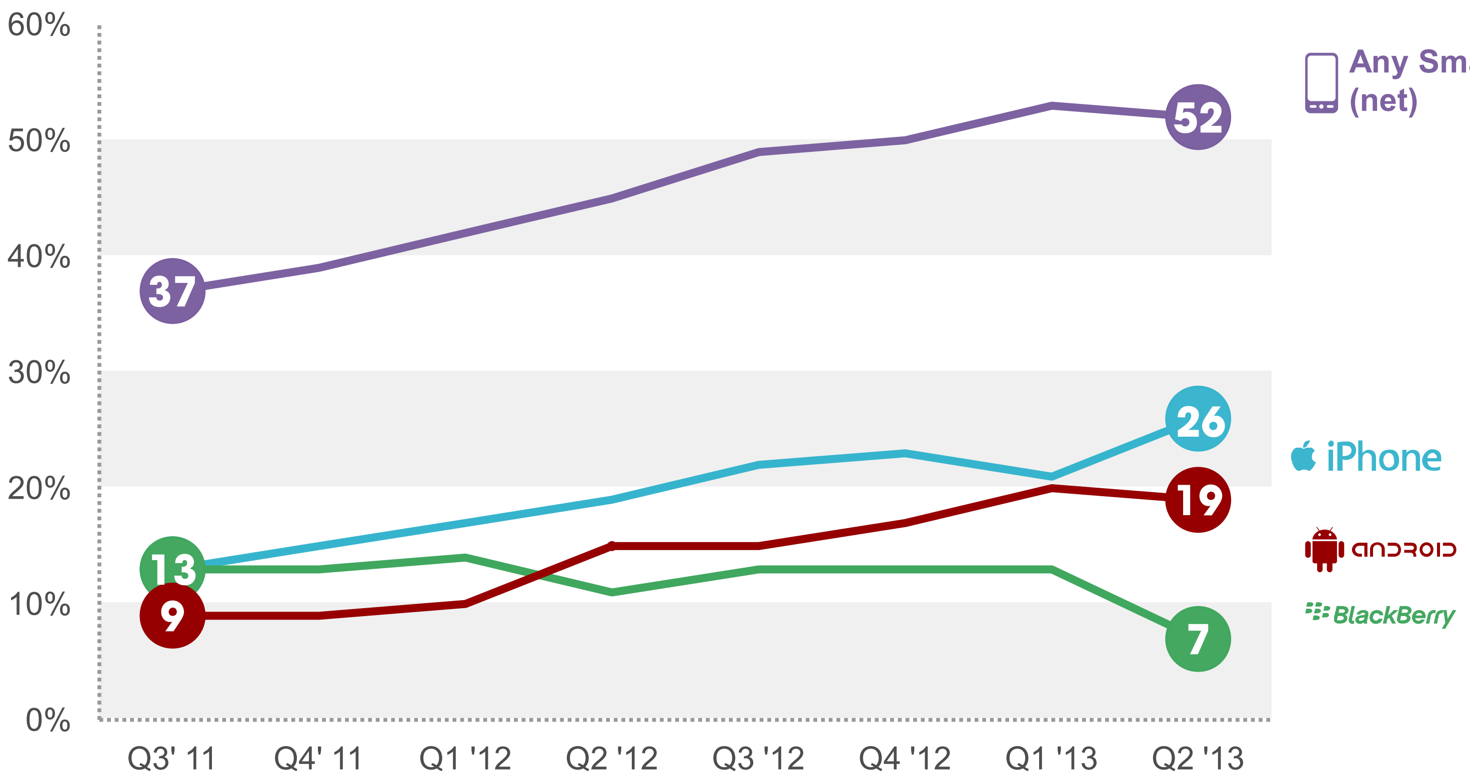
Base: 819 GB online adults aged 15+: Q2 2013

Source: Ipsos MORI

SMARTPHONE OWNERSHIP

GROWTH IN SMARTPHONES

BLACKBERRY VS. IPHONE VS. ANDROID OWNERSHIP



Customer profile

iPhone	
Males 15-34	26%
Males 35+	32%
Female 15-34	22%
Females 35+	20%

Android	
Males 15-34	25%
Males 35+	28%
Female 15-34	19%
Females 35+	28%

BlackBerry	
Males 15-34	20%
Males 35+	20%
Female 15-34	33%
Females 35+	27%

Base: circa 1000 GB adults aged 15+ per wave

Source: Ipsos MORI

WHO OWNS A SMARTPHONE

% OWN A SMARTPHONE BY GENDER AND SOCIAL GRADE ACROSS 2012- 2013

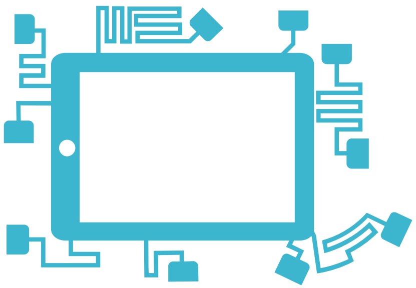
	All	15-24	25-34	35-44	45-54	55-64	65+
Males	55	76	75	72	62	33	14
Males AB	60	75	90	87	73	43	22
Males C1	62	78	83	71	72	39	13
Males C2	53	79	71	65	57	27	8
Males DE	44	72	60	55	36	17	5
Females	47	79	74	66	43	24	9
Females AB	53	83	89	83	51	40	17
Females C1	51	86	79	70	45	25	5
Females C2	44	74	67	59	38	11	7
Females DE	38	75	63	49	27	9	6

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

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

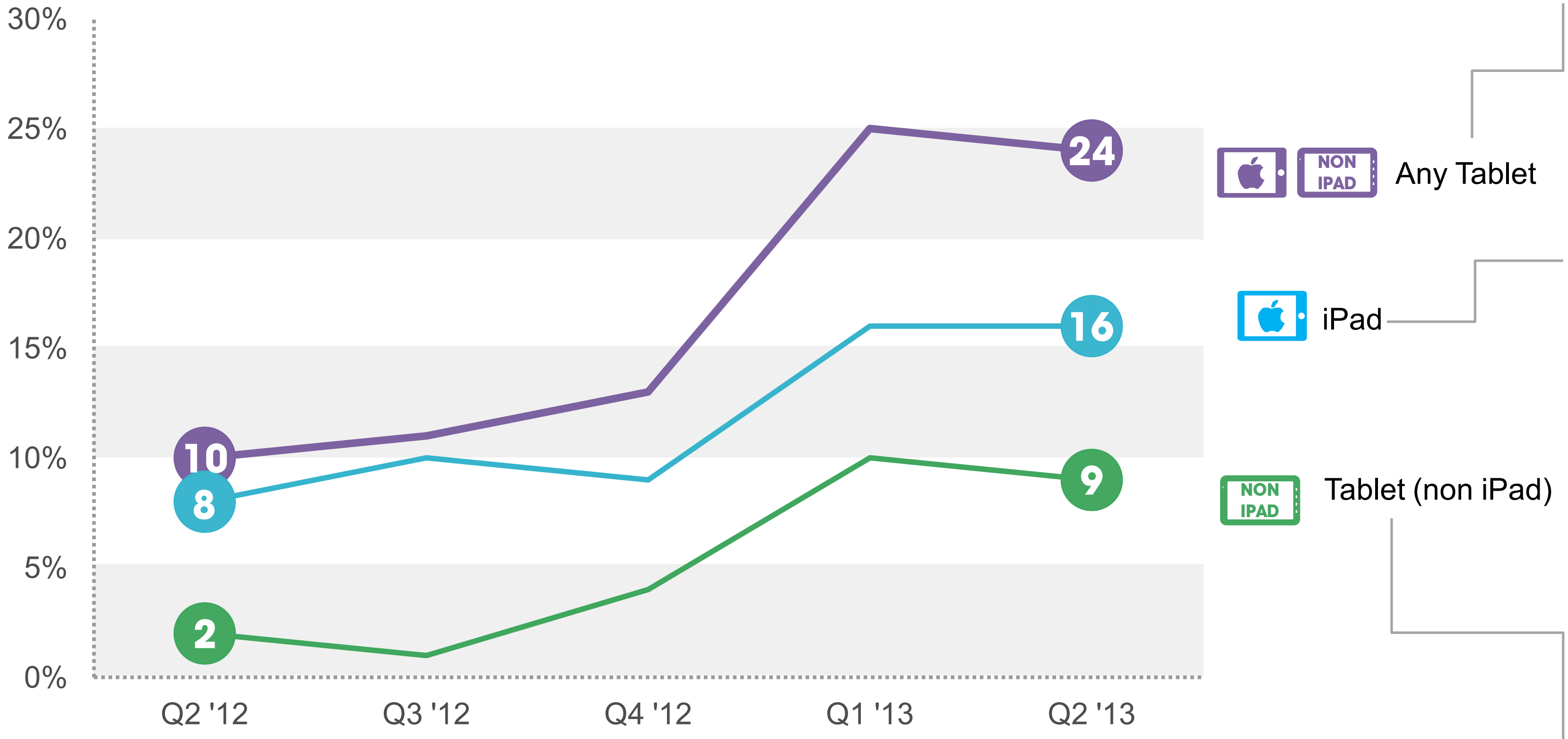
Source: Ipsos MORI

TABLET OWNERSHIP



GROWTH IN TABLETS

TABLET OWNERSHIP



Customer profile

Any Tablet	
Males 15-34	15%
Males 35+	34%
Female 15-34	19%
Females 35+	32%

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

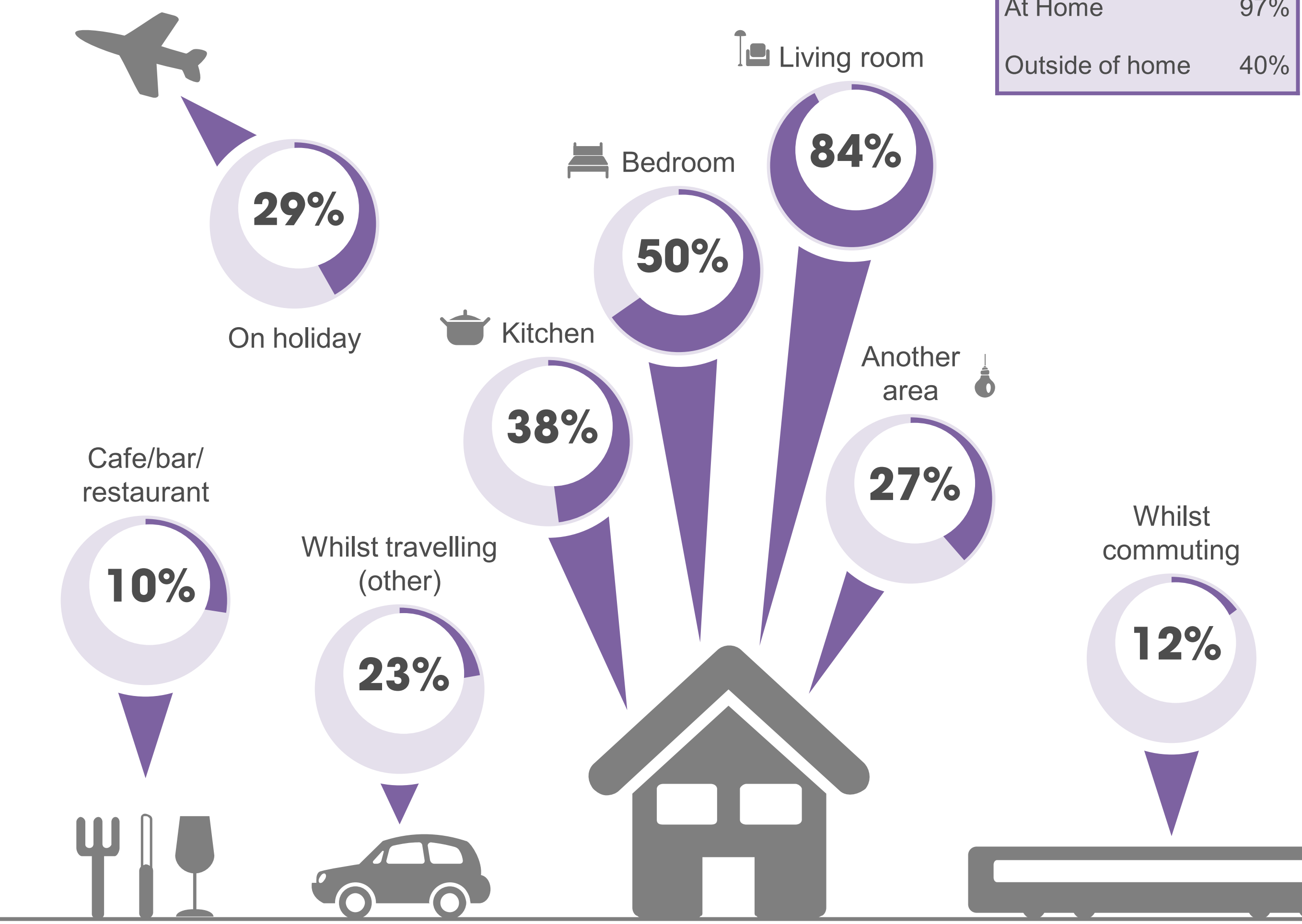
Non iPad	
Males 15-34	16%
Males 35+	30%
Female 15-34	18%
Females 35+	36%

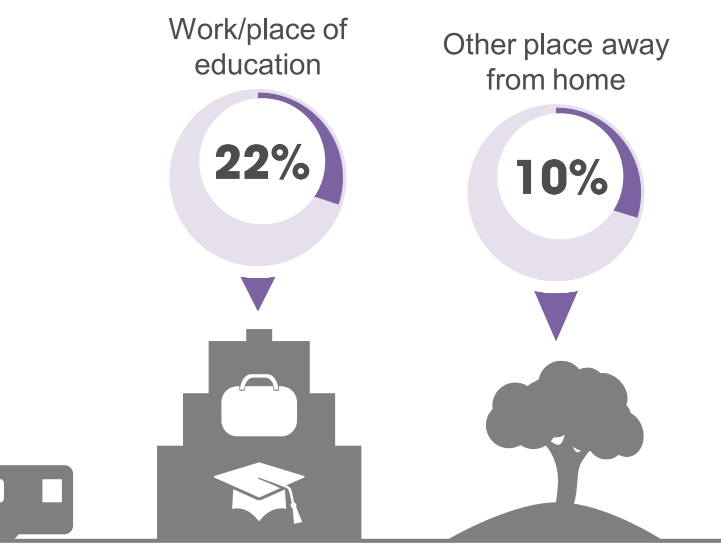
Base: circa 1000 GB adults aged 15+ per wave

Source: Ipsos MORI

WHERE DO YOU USE YOUR TABLET DEVICE?

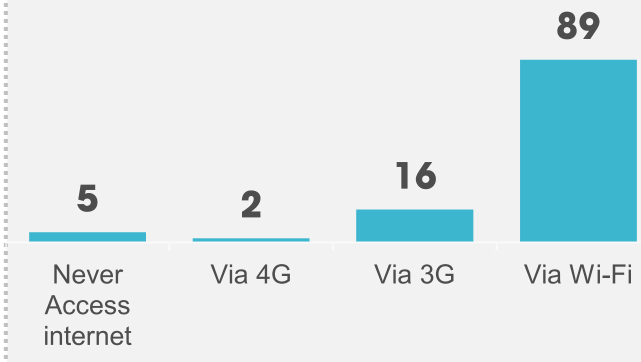
% LOCATION OF TABLET USAGE – Q2 2013





In vs. out of home use	
At Home	97%
Outside of home	40%

HOW DO YOU CONNECT TO THE INTERNET ON YOUR TABLET?

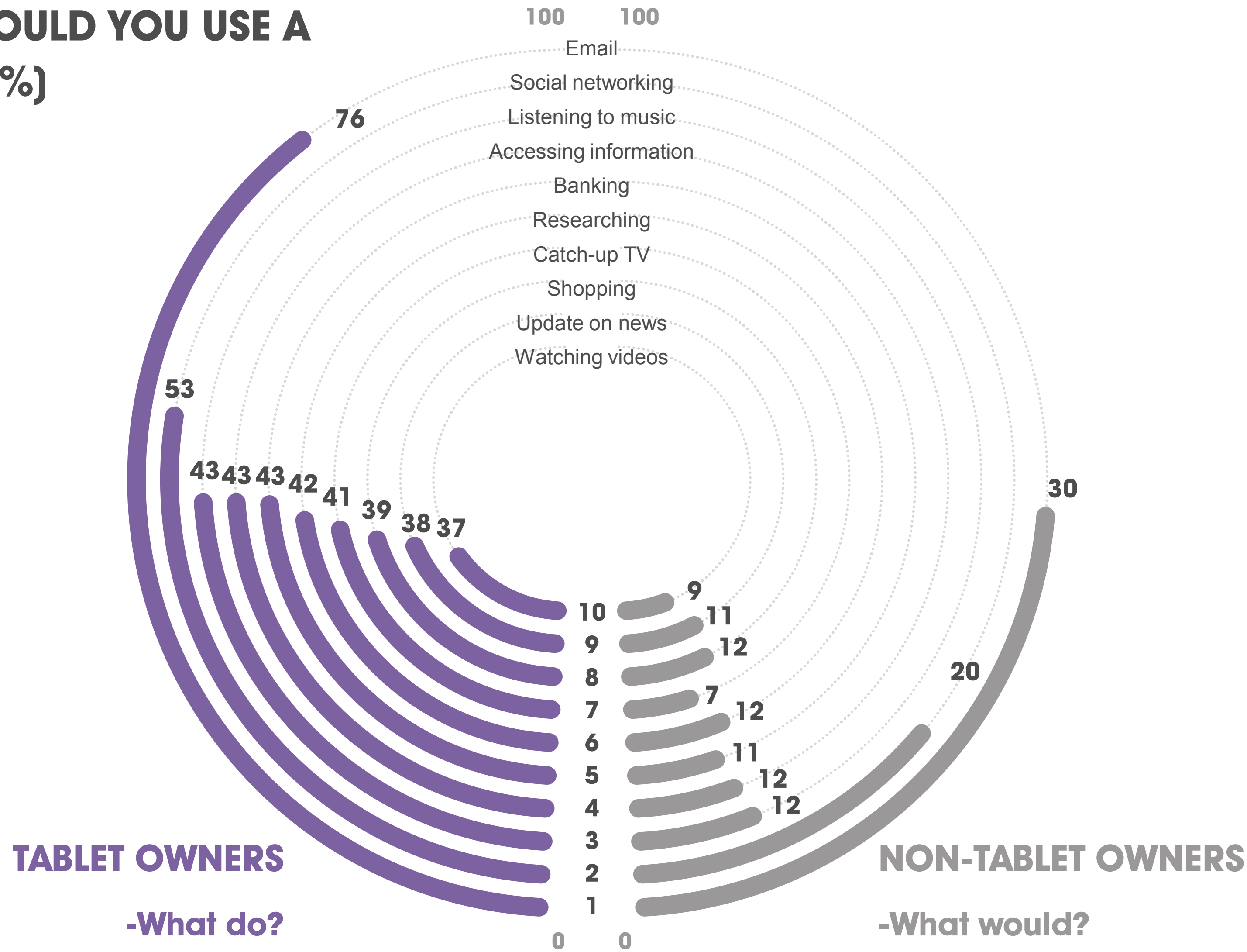


Base: 202 tablet owners aged 15+: Q2 2013

Source: Ipsos MORI

TABLET USAGE – WHAT FOR?

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

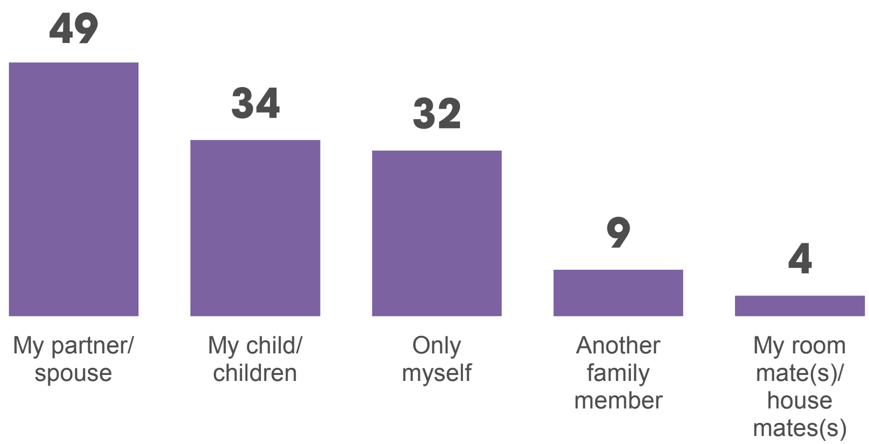


Base: 202 tablet owners and 771 non-tablet owners aged 15+: Q2 2013

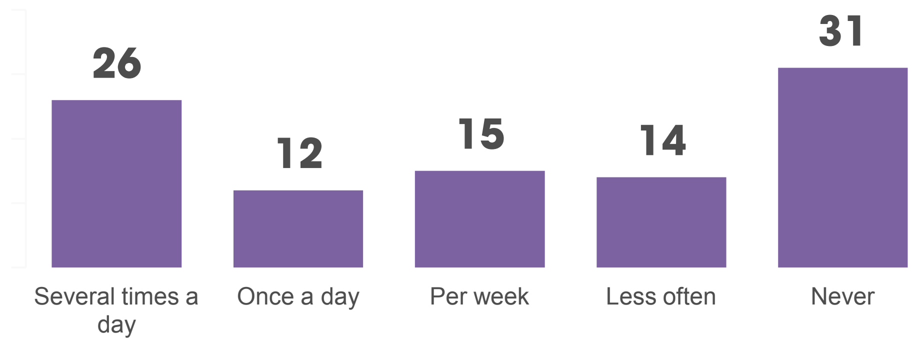
Source: Ipsos MORI

TABLET USAGE – in combination with TV viewing

PEOPLE IN HOUSEHOLD USING TABLET COMPUTER



FREQUENCY OF USING TABLET WHILE WATCHING TV



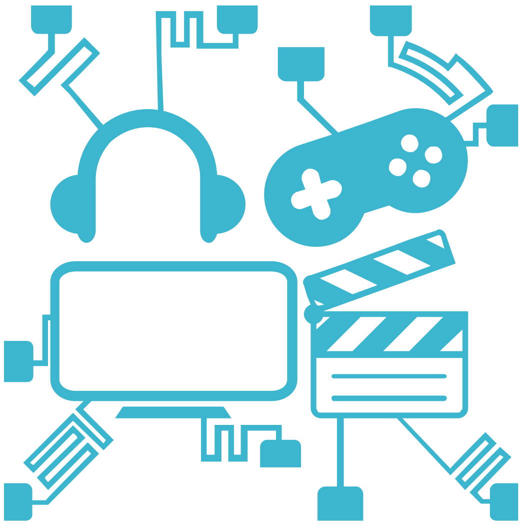
ACTIVITIES DONE ON THE TABLET WHILE WATCHING TV (Amongst those who use their tablet while watching TV)

3 in 4 do something unrelated to the TV content. **Only 8%** actually complement the two activities

Base: 202 tablet owners 15+: Q2 2013/ 134 for all who use their tablet while watching TV

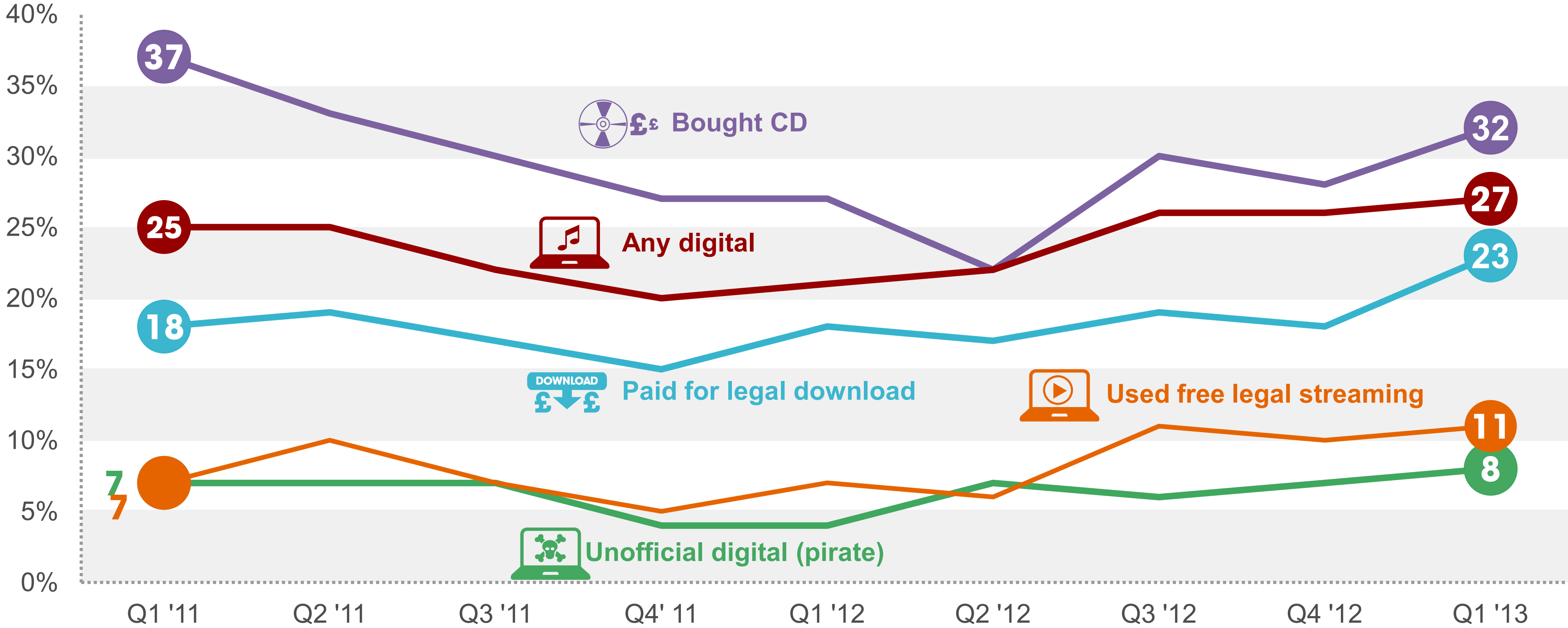
Source: Ipsos MORI

HOW WE CONSUME CONTENT - MUSIC



HOW WE CONSUME MUSIC

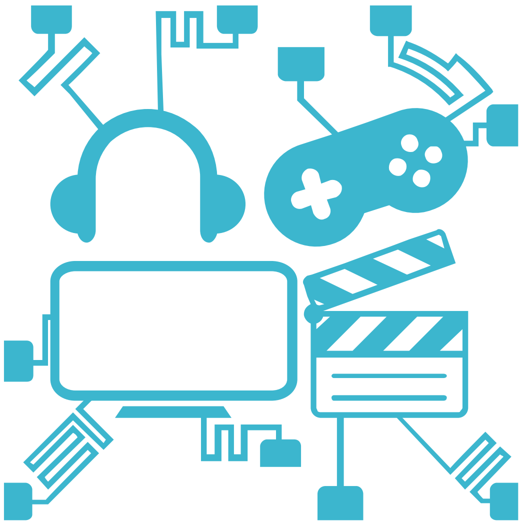
MUSIC CONSUMPTION



Base: circa 1000 GB adults aged 15+ per wave / Music consumption is being tracked in every 6-month

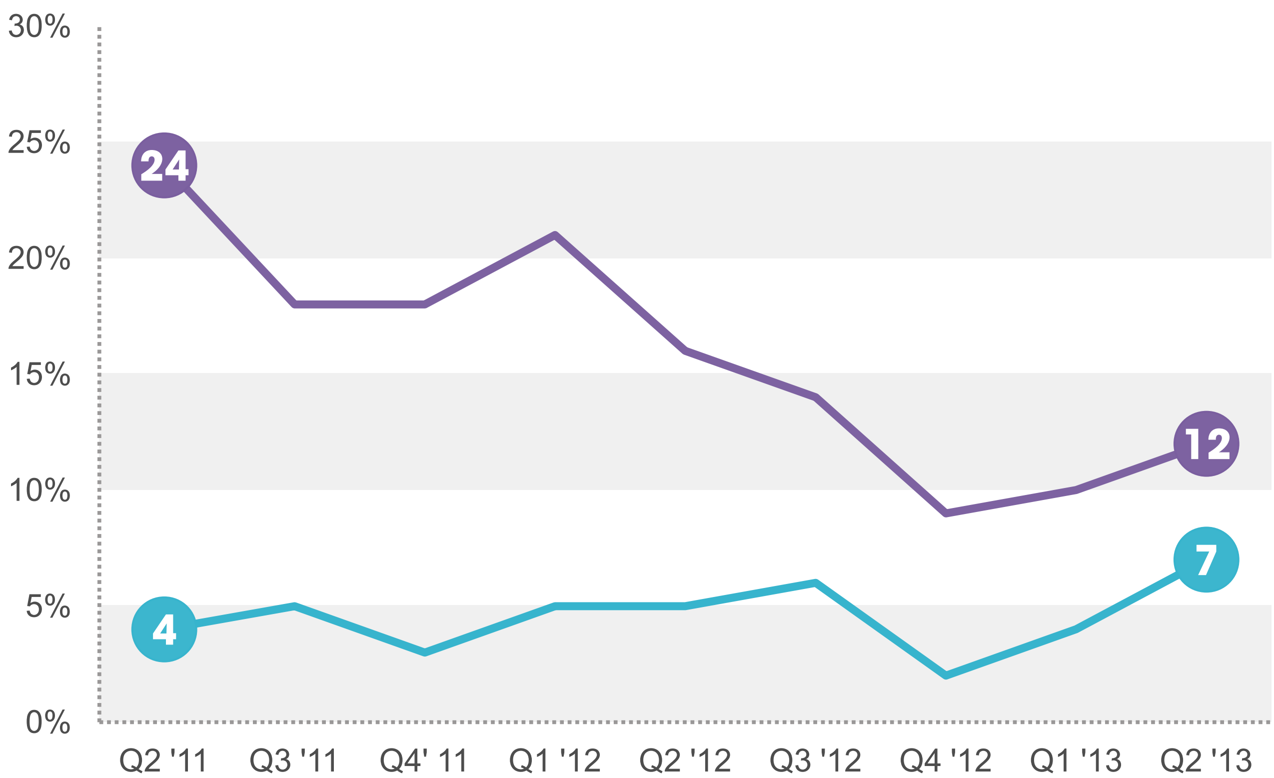
Source: Ipsos MORI

HOW WE CONSUME GAMES



HOW WE CONSUME GAMES FOR CONSOLES

GAMES CONSUMPTION



Bought a game on a disc for console

PS3 owners	34%
Xbox 360 owners	40%
Wii owners	35%

Paid to download a game direct to console

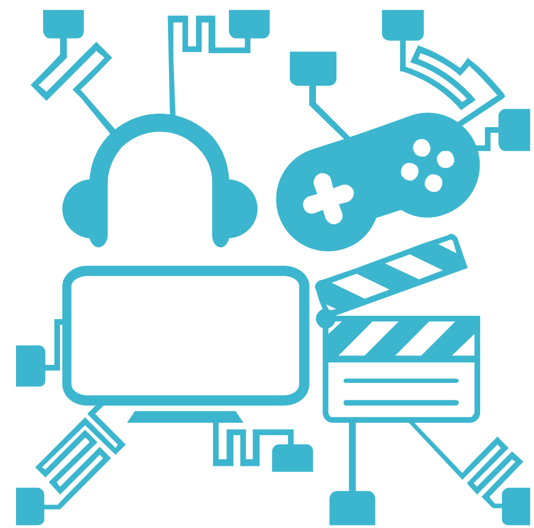
DOWNLOAD

PS3 owners	27%
Xbox 360 owners	25%
Wii owners	18%

Base: circa 1000 GB adults aged 15+ per wave

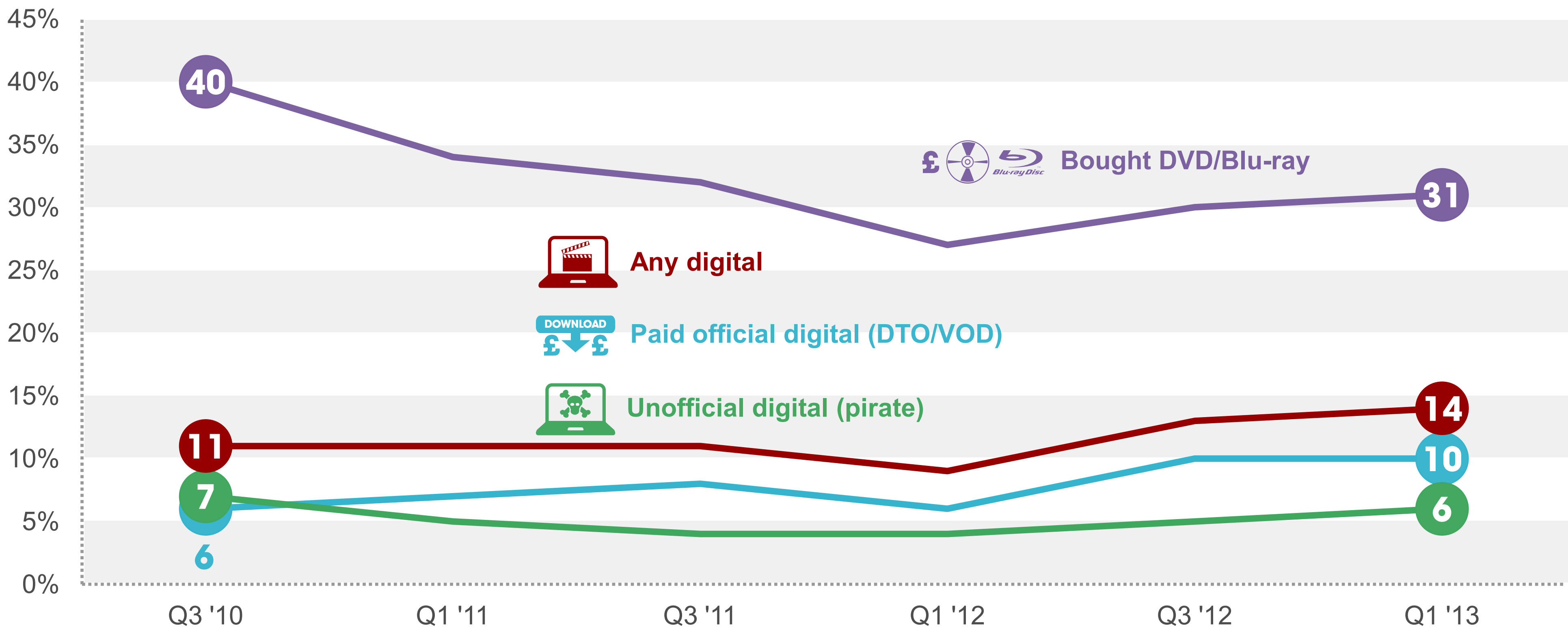
Source: Ipsos MORI

HOW WE ACCESS CONTENT – MOVIES / TV



HOW WE ACCESS MOVIES

MOVIE CONSUMPTION

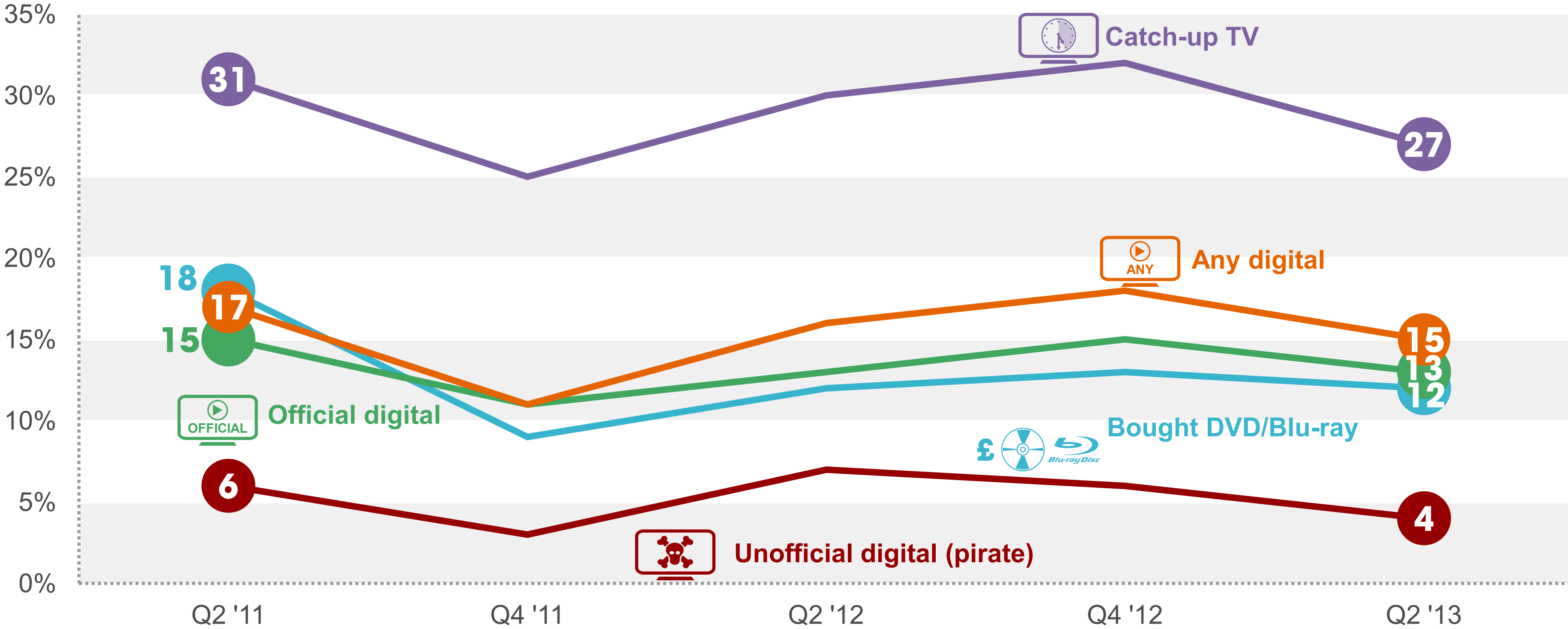


Base: circa 1,000 GB adults aged 15+ per wave / Movie consumption is tracked every 6 months

Source: Ipsos MORI

HOW WE ACCESS TV SERIES

TV SERIES CONSUMPTION



Base: circa 1000 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 **973 adults aged 15+ in GB.**

The latest interviews were carried out face to face **29th April – 12th May 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 available 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, 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”