TECH TRACKER

QUARTERLY RELEASE: Q1 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 1 2015 (Field in February)

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
- Technology and live events

HEADLINES

Internet usage

The proportion of adults accessing the internet remains consistent at 87%, with two-thirds now accessing via mobile.

The top online activities remain: accessing email (81%), browsing for information on hobbies (72%), researching products and services (67%) and online shopping (64%).

Connected home

The festive period has provided a boost in number of GB households owning a Connected TV, 3D TV or eBook Reader. 1 in 4 households claim to now have a Connected TV – double the pre-Christmas recorded figure.

38% of GB adults have at least one games console in their household which is at similar levels seen in Q1 last year. Ownership of consoles between brands is almost equal with both Wii/WiiU (18%) & PS3/4 (14%) and Xbox 360/One penetration at 19%.

Social networking

58% of GB adults access social networking sites and for the first time since the Tech Tracker began, equal numbers are accessing via PC/Laptop and Smartphone (37%). Nearly 1 in 4 claim to be accessing via Tablet – driven by a significant increase in device ownership.

55% of all adults have used Facebook in the past 3 months, with the other main providers circling around the 15% mark.

Smartphones

Smartphone ownership is 69%. Whilst iOS penetration has remained at similar levels to Q4 '14 (34%), Android has closed the gap over the festive period, rising significantly to 31% of GB adults.

Tablets

Just over half of GB adults (53%) now have at least one tablet in their household. This is a massive increase from 35% household ownership seen in Q4 '14. This increase suggests, that a tablet was the Christmas gift of choice this year. Whilst both iPad and non-iPad tablets recorded significant increases, non-IPads have closed the gap to Apple with a near equal split (iPad (30%), non-iPad (28%).

Content consumption

Compared with Q3 '14, consumption of both music and movies have increased significantly – particularly in the digital format.

Buoyed by the increased device ownership, similar levels say they have streamed or downloaded music in the last 12 months (21%) rising from 12% and 13% respectively in Q3 '14. 1 in 4 claim to have bought a CD.

1 in 5 have downloaded a movie in the last 12 months, although purchases of DVD/ Blu-ray continue to be the leading format with 27% claiming to have bought either.

Event interaction with technology

The purchase of tickets online is the leading tech touchpoint across all events covered, particularly tickets for travel where 40% of those who had travelled had done so. 39% of 45-54 year old theatre goers had purchased their ticket online.

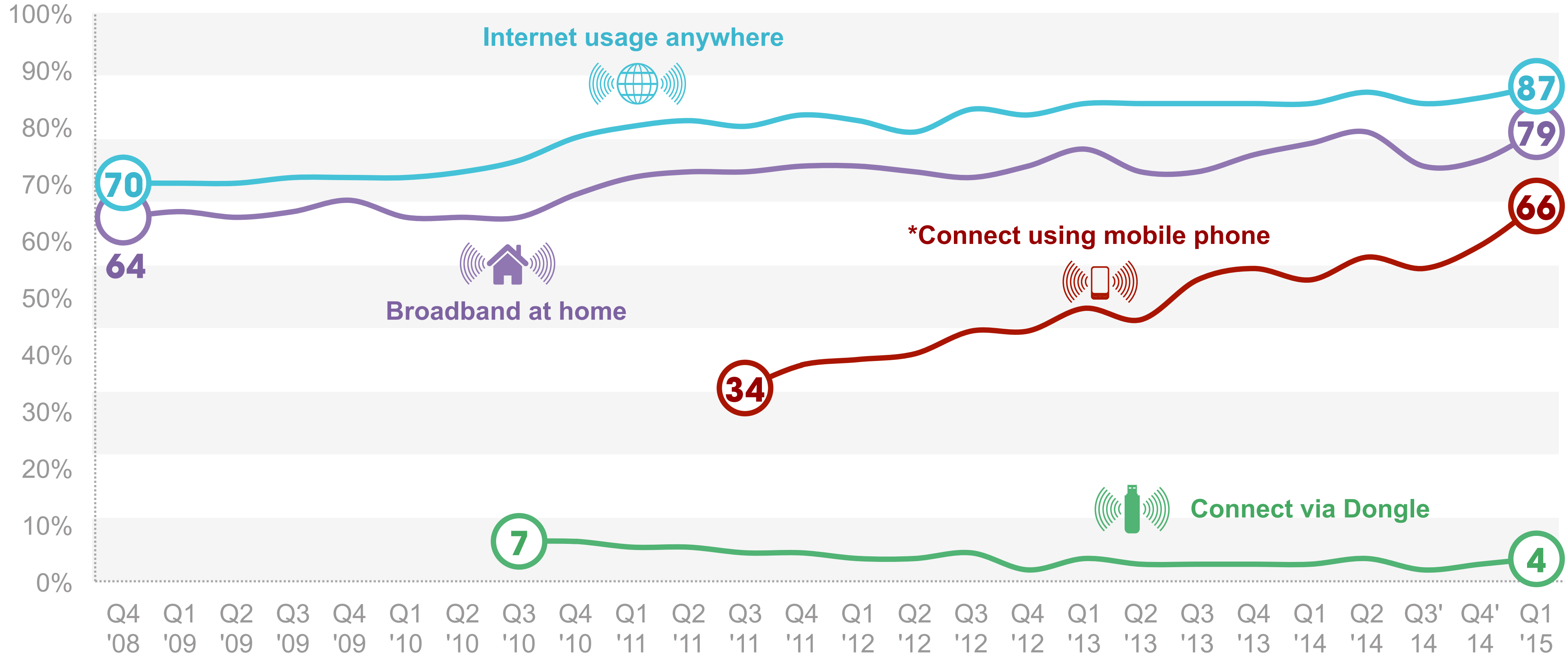
Given the increased levels of penetration, relatively low levels of social media interaction are seen across each event. Taking a trip and music gigs gain the most sharing of the experience, in particular 18% of 15-34 year olds shared photos/ videos of a music gig they had been to.

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	86%	97%	98%	93%	91%	83%	61%
Males AB	94%	100%	97%	100%	100%	96%	80%
Males C1	93%	97%	99%	98%	95%	92%	70%
Males C2	82%	99%	97%	89%	89%	81%	47%
Males DE	75%	95%	98%	81%	72%	55%	38%
Females	84%	98%	98%	94%	93%	82%	54%
Females AB	95%	100%	99%	100%	98%	94%	84%
Females C1	89%	99%	100%	99%	98%	91%	57%
Females C2	83%	98%	97%	95%	93%	82%	36%
Females DE	71%	97%	94%	78%	77%	55%	31%

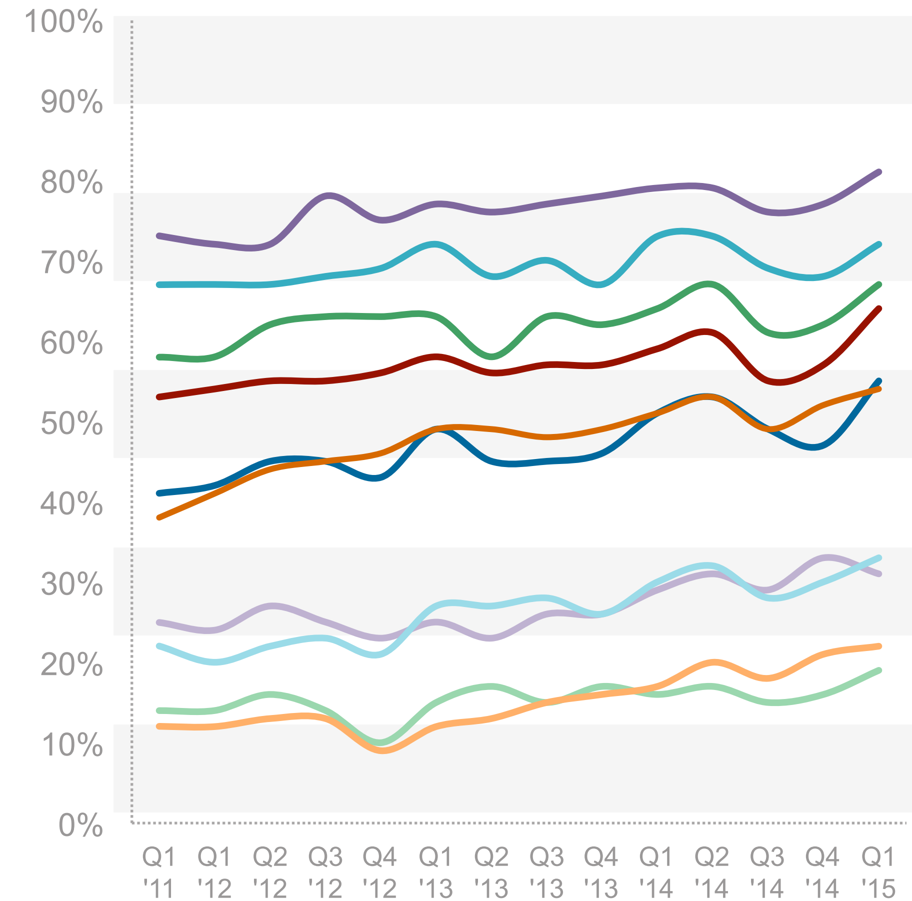
0-49% 50-79% 80-100%

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

Source: Ipsos MORI

CHANGING WAYS THE INTERNET IS USED

% USE OF THE INTERNET IN THE PAST 3 MONTHS



81% Emails

72% Visit sites for info personal interests

67% Visit sites for info on products thinking of buying

64% Visit sites to buy products online

55% Check bank account/ other financial holdings

54% Social networking

33% Download/ stream TV

31% Download/ stream music

22% Download/ stream movies

19% Play video games online

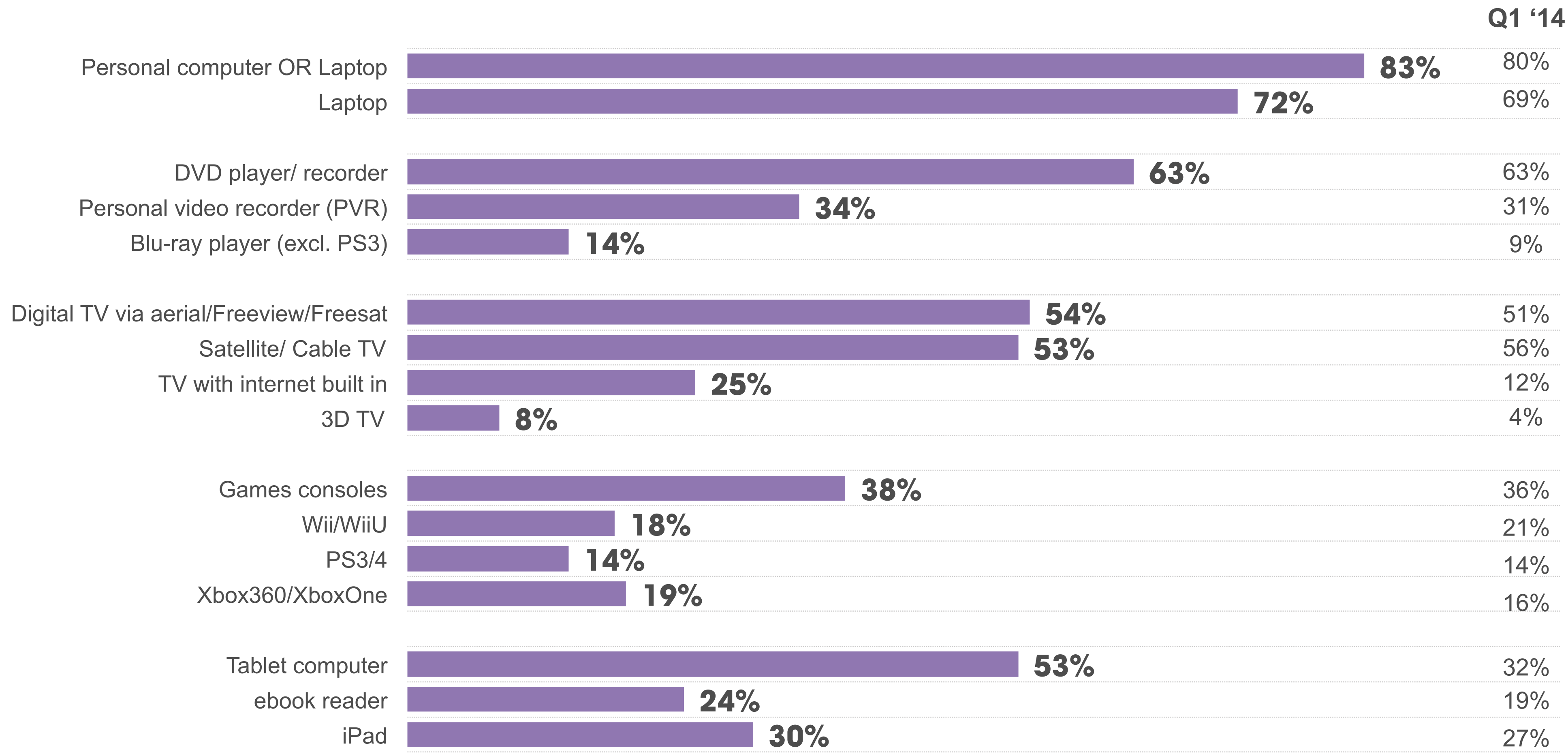
Base: circa 2,000 interviews per wave until Quarter 1 2010, circa 1,000 GB adults aged 15+ per wave thereafter

Source: Ipsos MORI

CONNECTED HOME

EQUIPMENT IN THE HOME

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



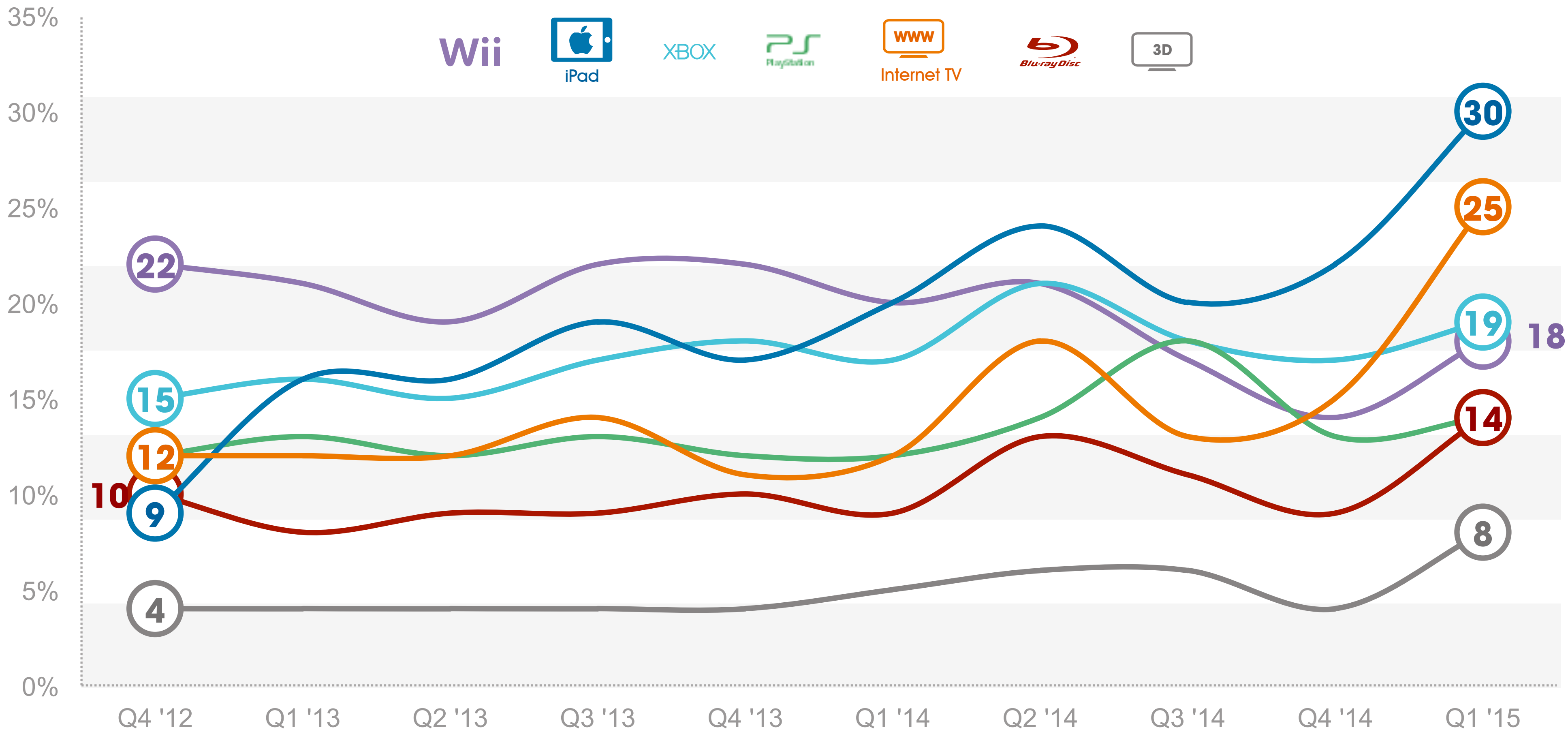
Base: circa 1,000 GB adults aged 15+

*Answer options used for measuring 'Digital TV, Freeview, Freesat / Satellite, Cable TV/ DVD Player/ recorder merged since Q1 2015, previous wave is calculated accordingly

Source: Ipsos MORI

TRENDS IN EQUIPMENT OWNERSHIP IN THE HOME

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



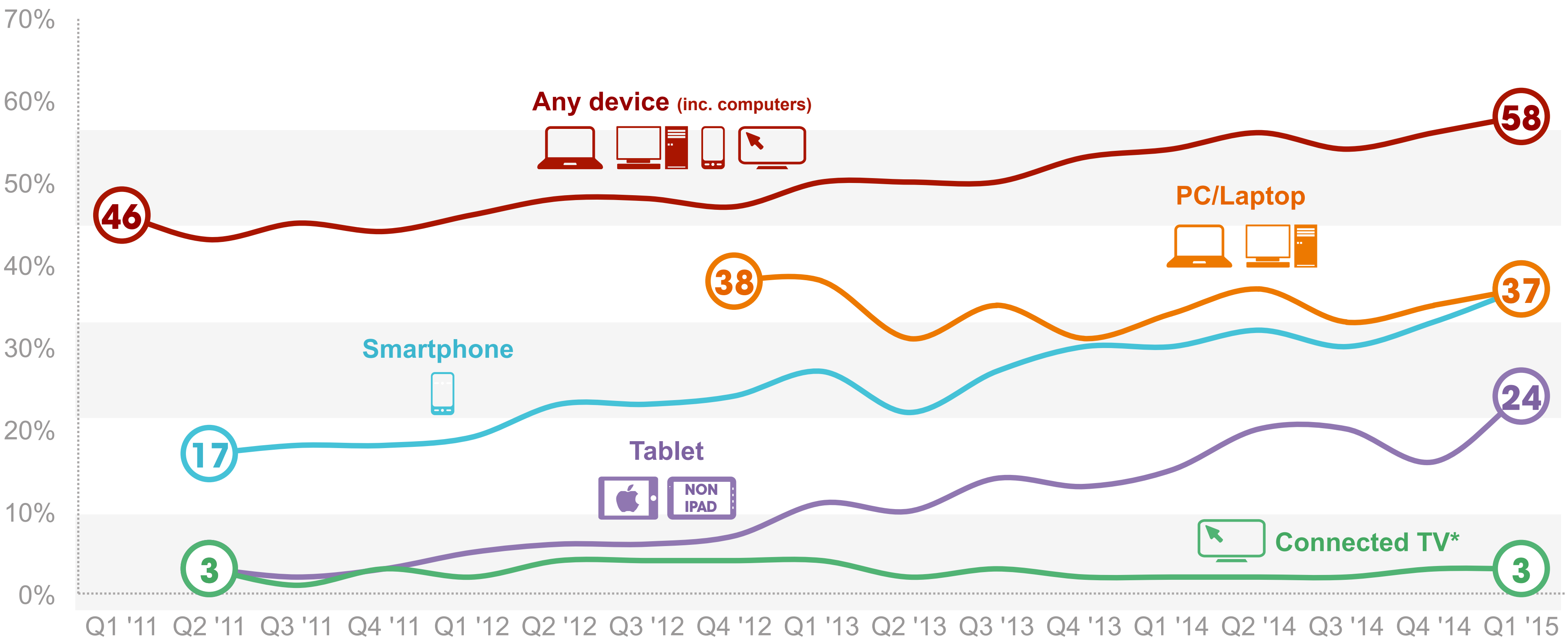
Base: circa 1,000 GB adults aged 15+ per wave

Source: Ipsos MORI

SOCIAL NETWORKING

TRENDS IN VISITING SOCIAL NETWORKING SITES

% VISITING SOCIAL NETWORKING SITES



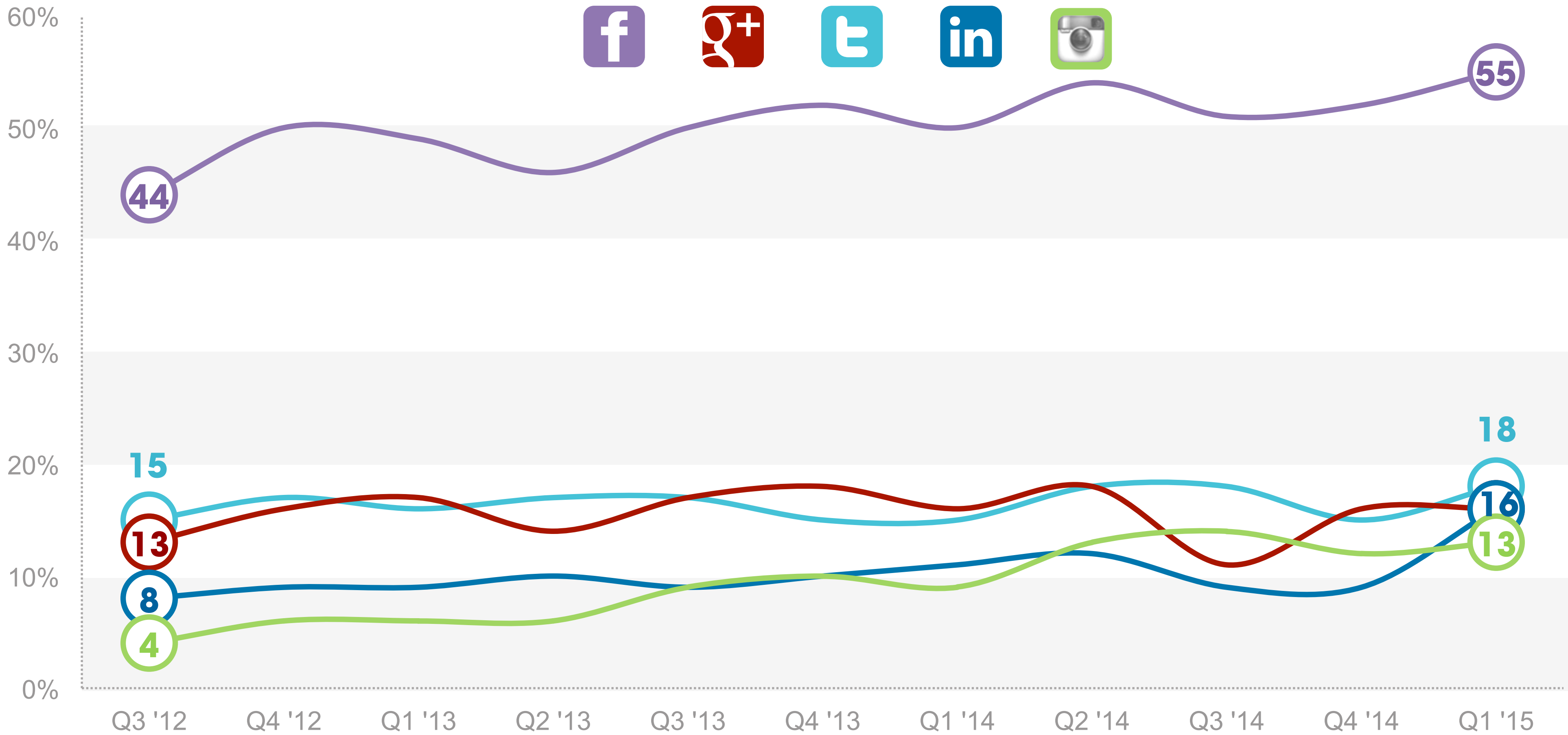
Connected TV* - Games console, web enabled TVs and PCs connected to a TV

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		
49%	Male	49
51%	Female	51
16%	15-24	23
17%	25-34	24
16%	35-44	20
17%	45-54	16
35%	55+	17
27%	AB	27
27%	C1	30
22%	C2	21
25%	DE	22
69%	Own Smartphone	87
53%	Own Tablet	64

The profile of Facebook users is younger than the GB adult population, with nearly half aged under 35.

Device ownership is also higher amongst Facebook users, with 87% owning a smartphone and two-thirds owning a tablet.

Base: circa GB adults 1,000 / All visiting / using Facebook in last 3 months (516) Q1 2015

Source: Ipsos MORI

SOCIAL NETWORKING – FACEBOOK

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

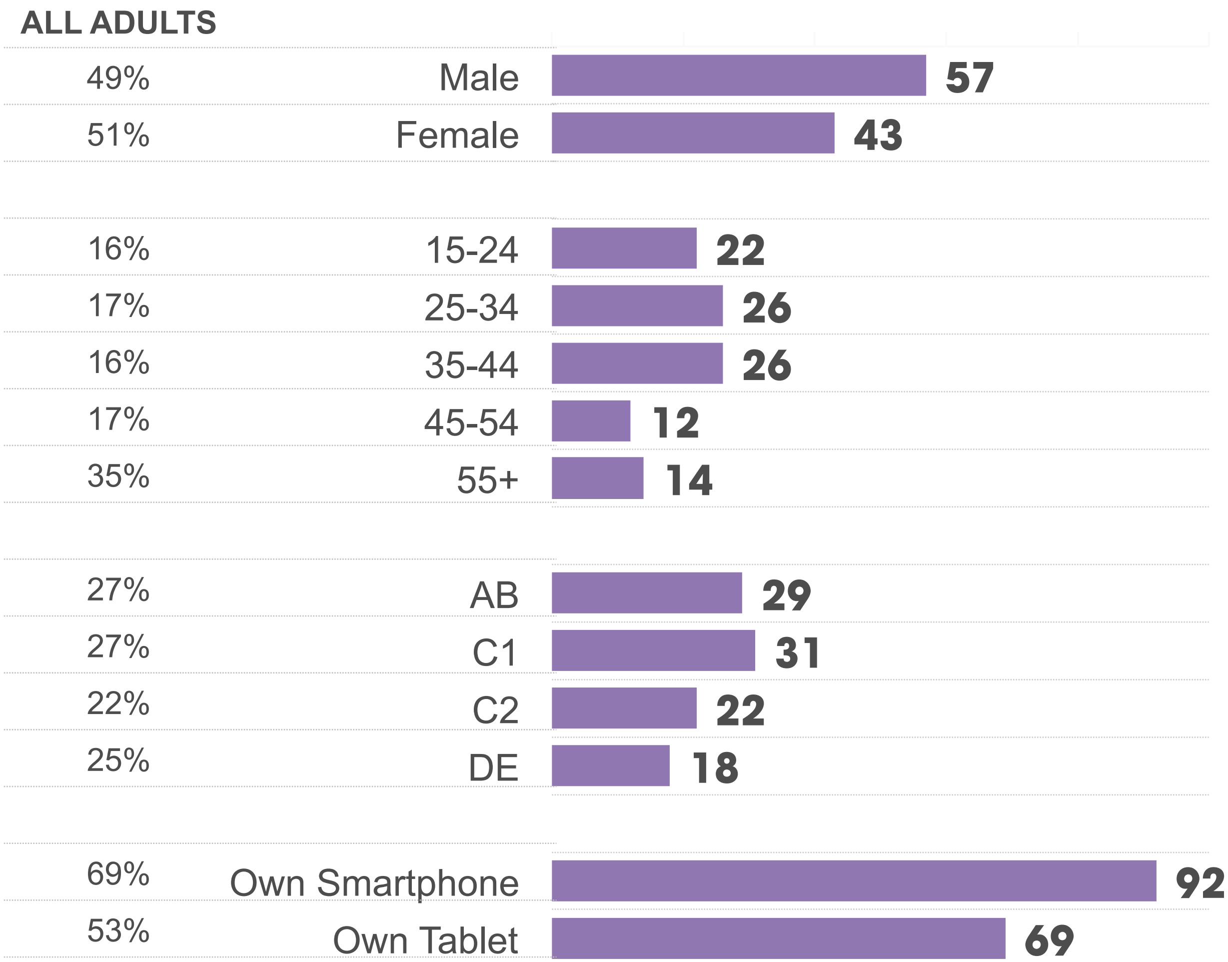
	All	15-24	25-34	35-44	45-54	55-64	65+
Males	52%	79%	76%	61%	50%	35%	14%
Males AB	56%	90%	85%	71%	65%	41%	19%
Males C1	55%	81%	73%	69%	46%	35%	16%
Males C2	49%	75%	74%	55%	46%	36%	12%
Males DE	46%	74%	71%	47%	39%	26%	8%
Females	54%	84%	79%	66%	54%	39%	18%
Females AB	51%	84%	79%	63%	55%	39%	25%
Females C1	61%	87%	86%	76%	65%	48%	19%
Females C2	56%	89%	77%	70%	50%	36%	12%
Females DE	49%	80%	75%	55%	38%	30%	12%

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

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

Source: Ipsos MORI

PROFILE OF GOOGLE+ USERS



Google+ users have a much younger profile than the GB adult population with nearly three-quarters under 45.

6 in 10 are ABC1 with the majority owning a smartphone.

Base: circa GB adults 1,000 / All visiting / using Google+ in last 3 months (155) Q1 2015

Source: Ipsos MORI

SOCIAL NETWORKING – GOOGLE+

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

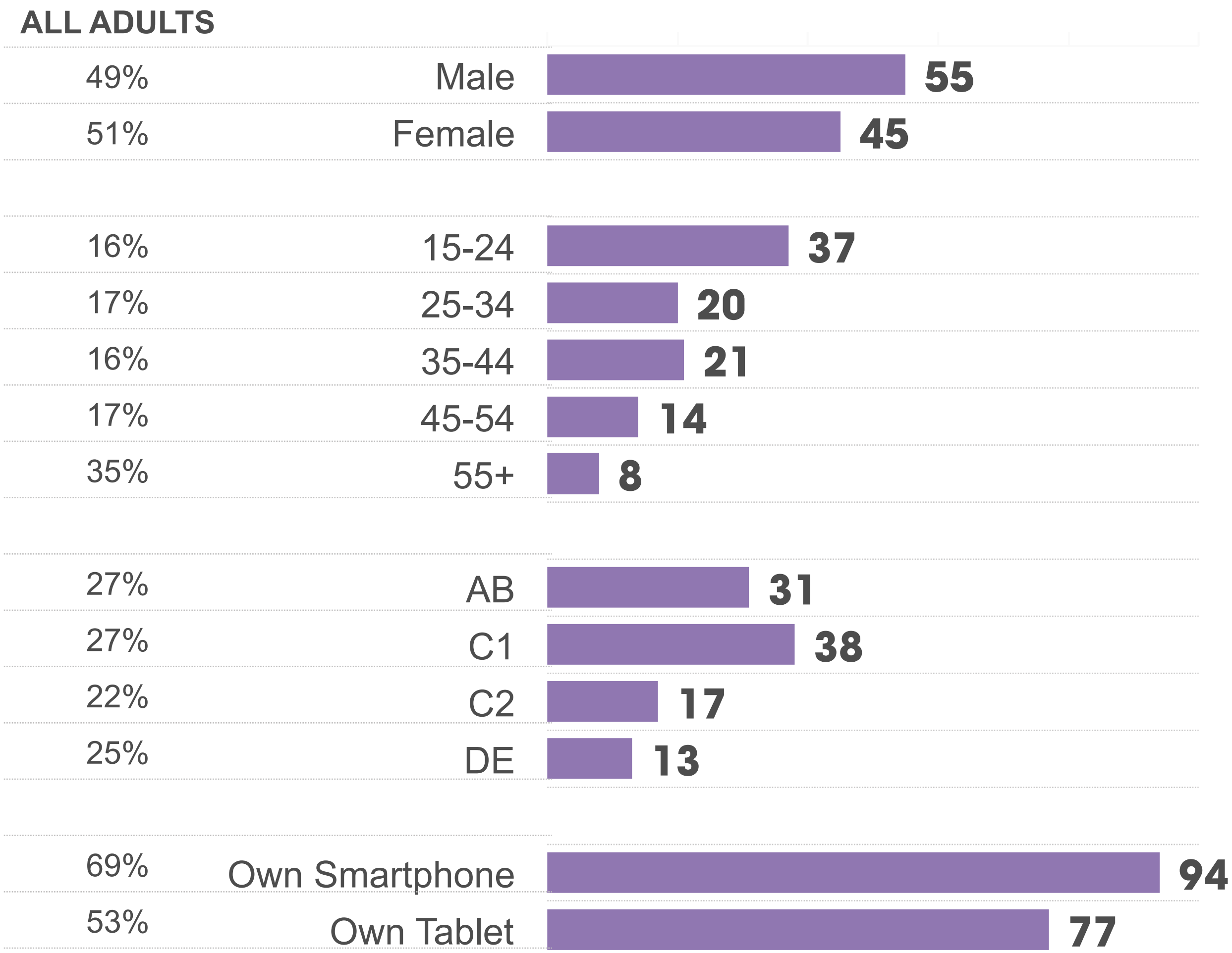
	All	15-24	25-34	35-44	45-54	55-64	65+
Males	16%	22%	19%	25%	16%	12%	4%
Males AB	17%	14%	17%	32%	24%	16%	4%
Males C1	21%	29%	30%	29%	15%	15%	7%
Males C2	13%	20%	11%	18%	18%	9%	4%
Males DE	13%	21%	22%	17%	6%	5%	2%
Females	14%	22%	23%	14%	14%	12%	5%
Females AB	16%	26%	36%	5%	17%	13%	11%
Females C1	14%	27%	20%	12%	15%	13%	2%
Females C2	15%	21%	14%	24%	16%	14%	5%
Females DE	12%	16%	23%	16%	3%	9%	3%

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

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

Source: Ipsos MORI

PROFILE OF TWITTER USERS



Nearly 6 in 10 Twitter users are aged under 35.

As 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 (165) Q1 2015

Source: Ipsos MORI

SOCIAL NETWORKING – TWITTER

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

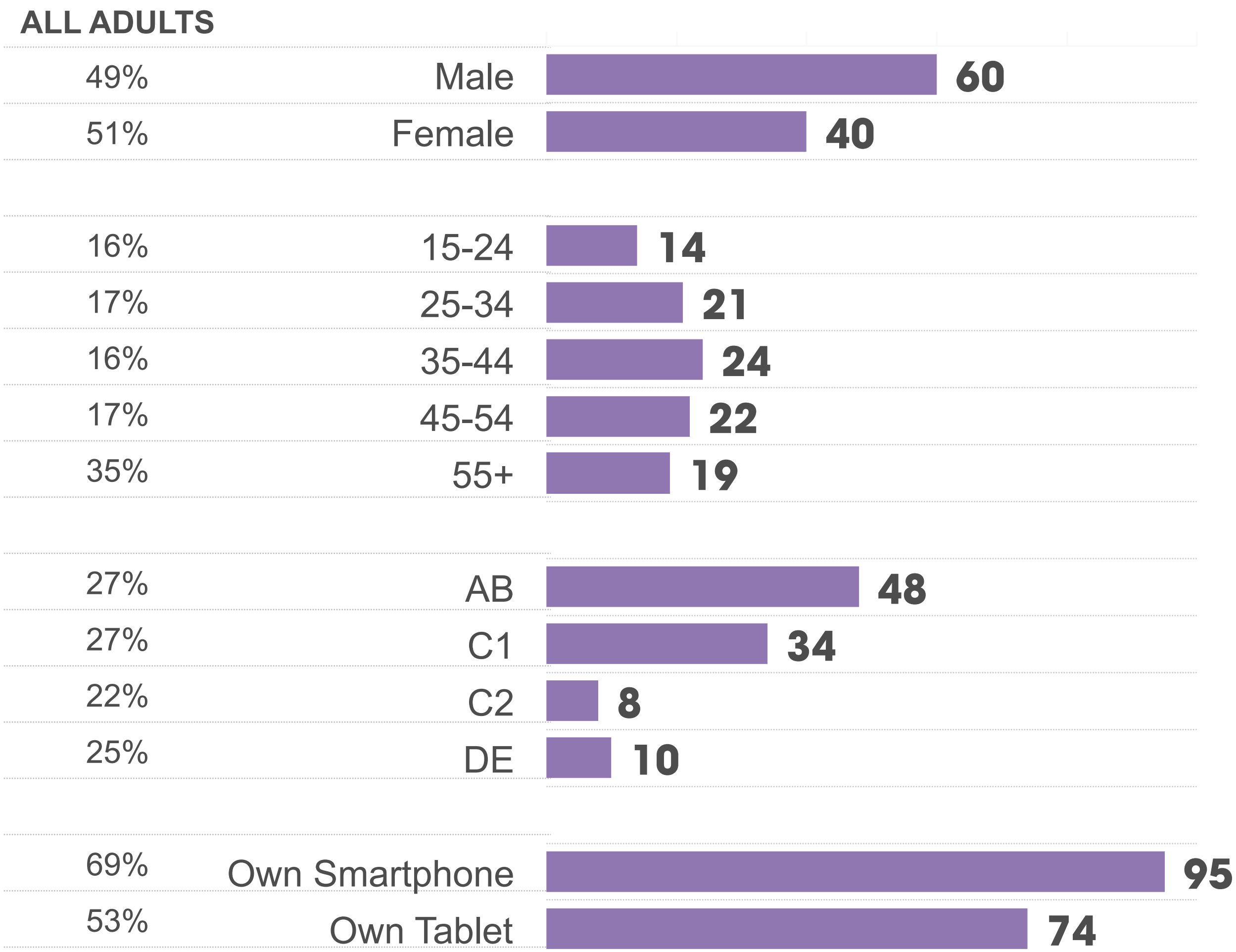
	All	15-24	25-34	35-44	45-54	55-64	65+
Males	19%	37%	27%	22%	17%	8%	2%
Males AB	24%	39%	40%	31%	29%	15%	4%
Males C1	21%	38%	31%	26%	15%	5%	5%
Males C2	16%	40%	22%	15%	13%	4%	0%
Males DE	13%	34%	15%	10%	8%	3%	1%
Females	16%	42%	19%	20%	11%	5%	2%
Females AB	16%	61%	27%	23%	16%	8%	3%
Females C1	22%	55%	24%	30%	13%	6%	3%
Females C2	15%	38%	20%	19%	5%	2%	1%
Females DE	9%	29%	8%	5%	7%	0%	0%

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

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

Source: Ipsos MORI

PROFILE OF LINKEDIN USERS



Linkedin is a more specific social network: it is highest amongst those aged 25-54 and almost half are social grade AB.

Consequently, Smartphone and Tablet ownership are higher than the GB adult population.

Base: circa GB adults 1,000 / All visiting / using LinkedIn in last 3 months (148) Q1 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%	21%	18%	19%	13%	3%
Males AB	27%	21%	43%	39%	40%	21%	4%
Males C1	14%	9%	25%	13%	21%	14%	4%
Males C2	7%	8%	11%	6%	5%	11%	3%
Males DE	5%	9%	5%	4%	4%	3%	2%
Females	9%	11%	8%	16%	12%	8%	3%
Females AB	18%	24%	14%	28%	24%	15%	7%
Females C1	12%	16%	12%	20%	13%	11%	2%
Females C2	4%	8%	8%	8%	0%	3%	0%
Females DE	2%	5%	1%	3%	0%	0%	0%

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

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

Source: Ipsos MORI

PROFILE OF INSTAGRAM USERS

ALL ADULTS		Instagram users
49%	Male	47
51%	Female	53
16%	15-24	53
17%	25-34	23
16%	35-44	13
17%	45-54	8
35%	55+	4
27%	AB	18
27%	C1	42
22%	C2	22
25%	DE	18
69%	Own Smartphone	98
53%	Own Tablet	68

Just over half of all Instagram users are aged 15-24, with 6 in 10 being ABC1.

Instagram's functionality leans itself to near universal Smartphone ownership amongst its users.

Base: circa GB adults 1,000 / All visiting / using Instagram in last 3 months (129) Q1 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	12%	34%	23%	9%	4%	3%	0%
Males AB	13%	37%	35%	12%	7%	6%	1%
Males C1	14%	37%	22%	12%	3%	4%	0%
Males C2	11%	31%	19%	7%	3%	0%	0%
Males DE	10%	29%	18%	3%	5%	0%	0%
Females	13%	45%	20%	12%	7%	1%	1%
Females AB	11%	74%	20%	10%	11%	3%	1%
Females C1	18%	58%	28%	15%	5%	1%	1%
Females C2	14%	36%	22%	15%	8%	0%	0%
Females DE	11%	33%	11%	9%	4%	1%	0%

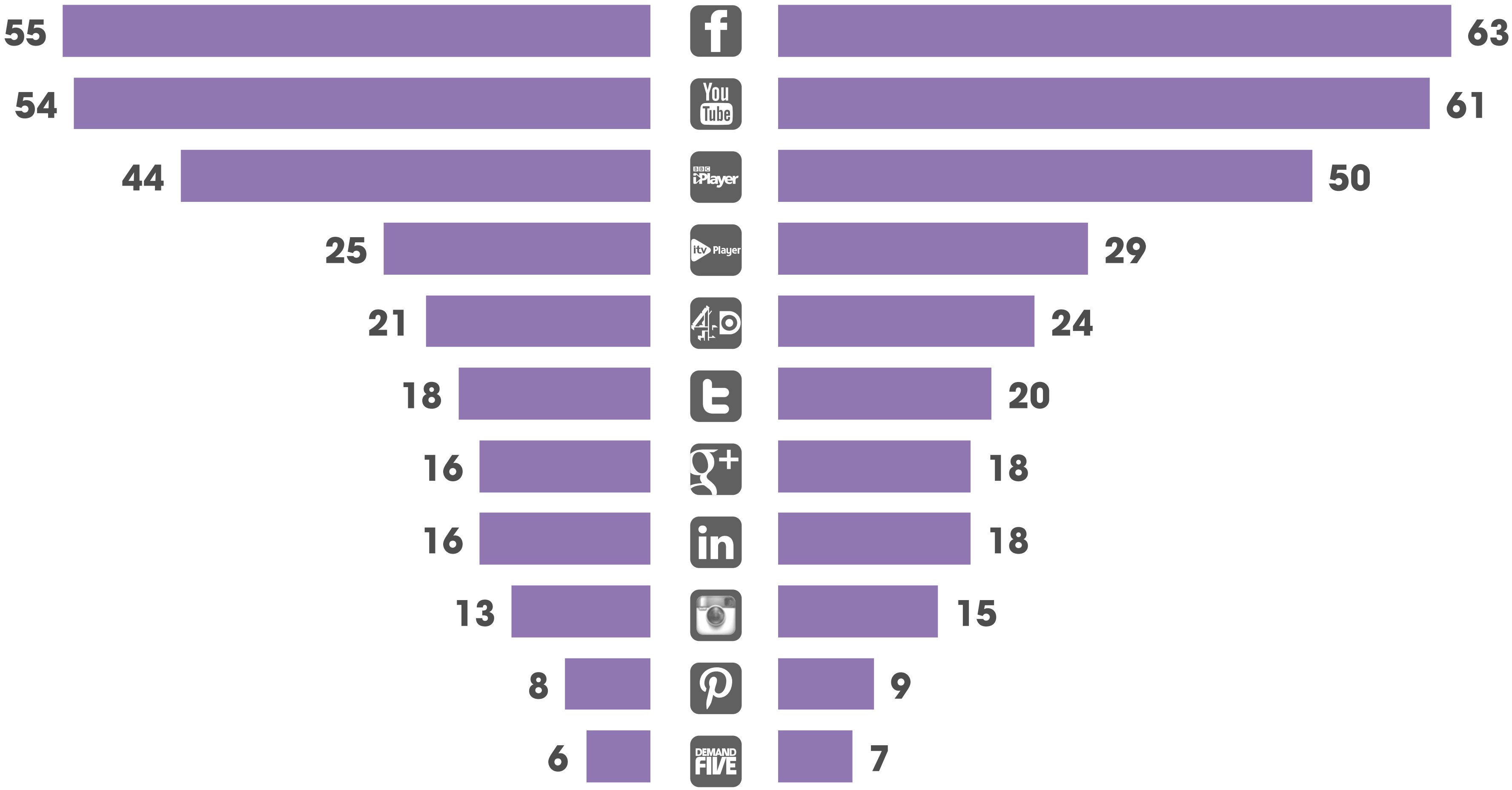
0-49% 50-79% 80-100%

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

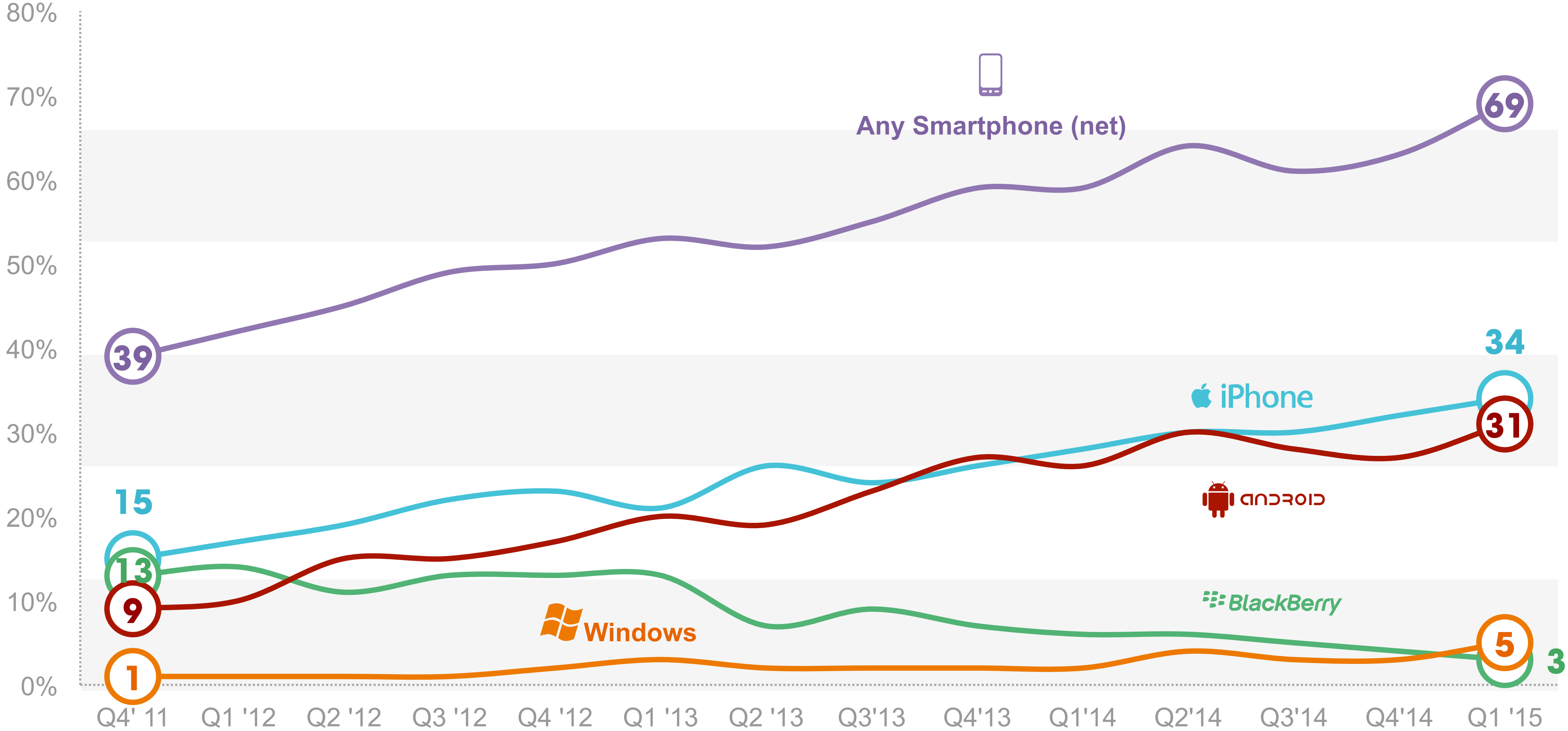
Base: 844 GB online adults aged 15+: Q1 2015

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	66%	90%	89%	83%	69%	50%	20%
Males AB	74%	95%	98%	98%	90%	63%	28%
Males C1	70%	94%	90%	87%	61%	57%	19%
Males C2	62%	86%	83%	71%	73%	43%	17%
Males DE	56%	86%	85%	68%	44%	26%	13%
Females	63%	90%	89%	82%	69%	47%	17%
Females AB	69%	100%	94%	91%	82%	61%	24%
Females C1	68%	95%	95%	87%	73%	49%	21%
Females C2	60%	86%	87%	84%	61%	38%	7%
Females DE	54%	87%	81%	63%	47%	34%	11%

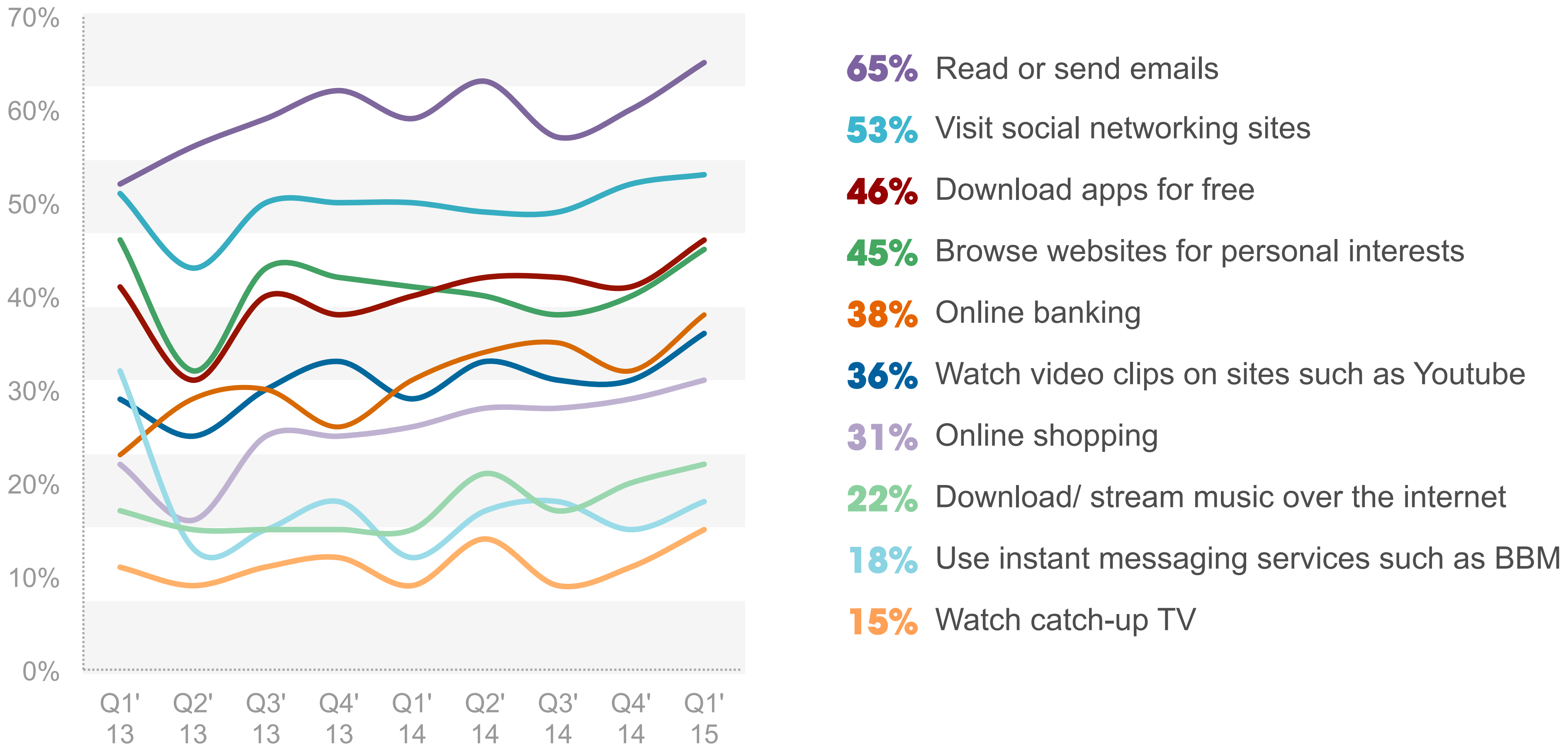
0-49% 50-69% 70-100%

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

Source: Ipsos MORI

CHANGING WAYS SMARTPHONE IS USED

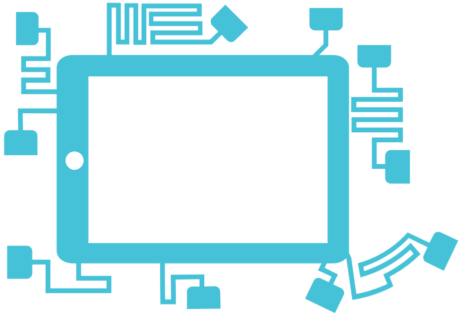
USE OF SMARTPHONE IN THE PAST 3 MONTHS



Base: circa 430-650 smartphone owners per wave

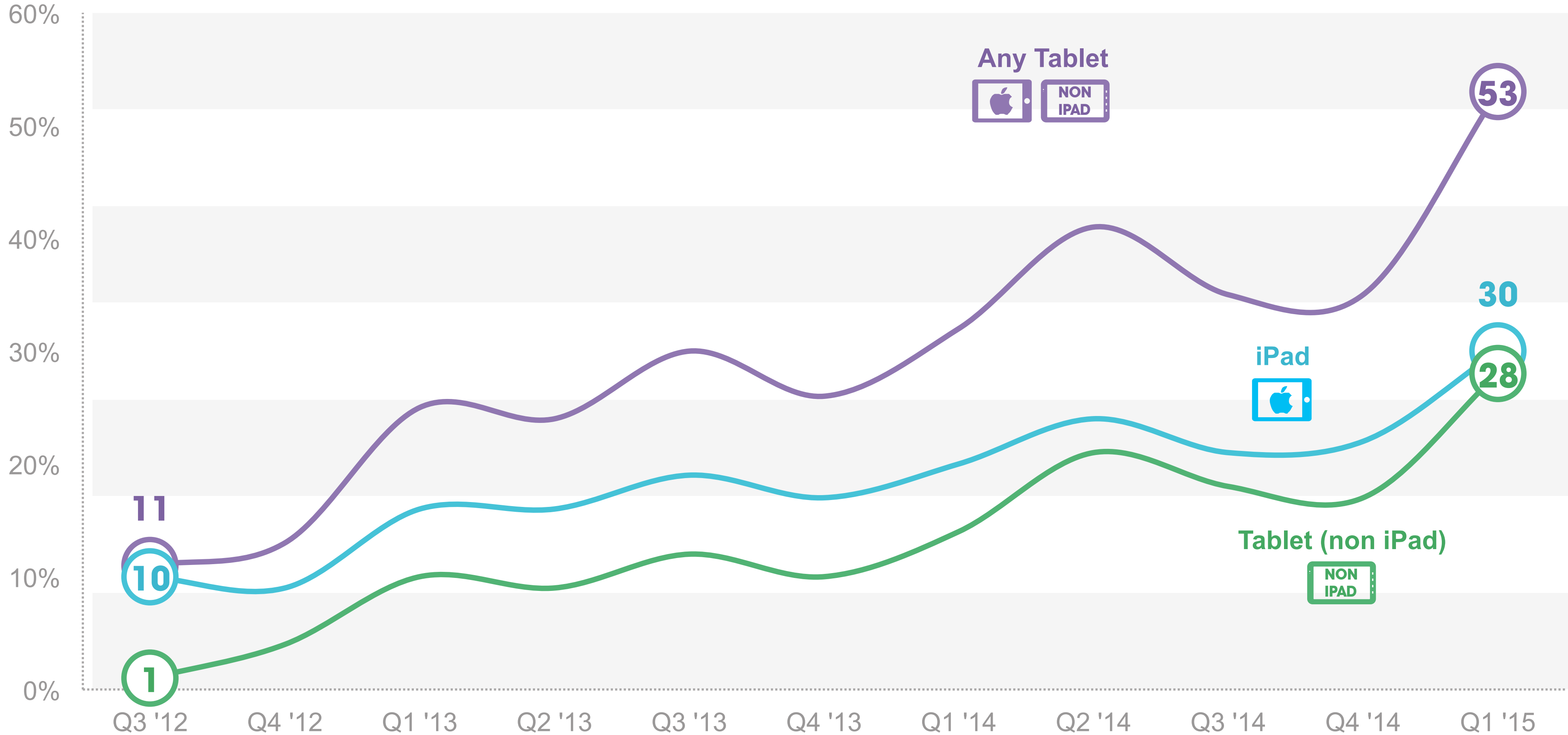
Source: Ipsos MORI

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

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	41%	40%	45%	54%	46%	40%	27%
Males AB	57%	49%	62%	74%	73%	50%	38%
Males C1	48%	40%	52%	64%	43%	57%	37%
Males C2	34%	47%	38%	42%	38%	28%	16%
Males DE	22%	27%	28%	27%	24%	12%	12%
Females	40%	43%	48%	54%	46%	42%	19%
Females AB	50%	60%	56%	61%	59%	51%	29%
Females C1	45%	52%	60%	57%	44%	48%	20%
Females C2	38%	42%	44%	55%	37%	42%	14%
Females DE	27%	31%	35%	40%	36%	20%	10%

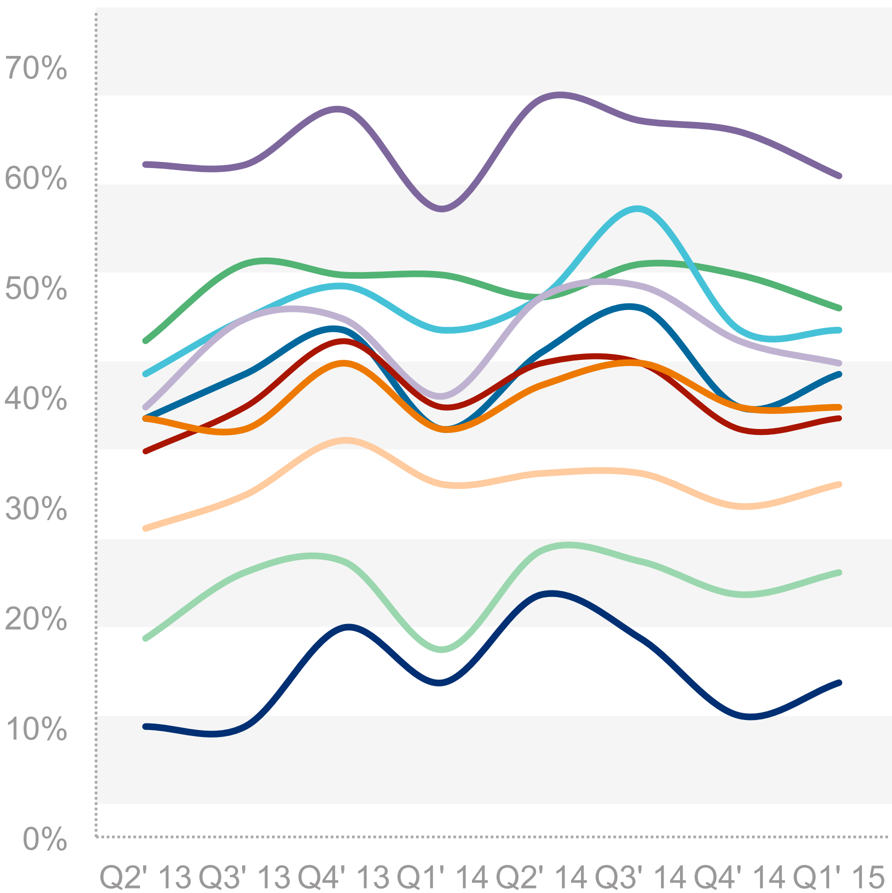
0-24% 25-49% 50-100%

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

Source: Ipsos MORI

CHANGING WAYS TABLET IS USED

USE OF TABLET IN THE PAST 3 MONTHS

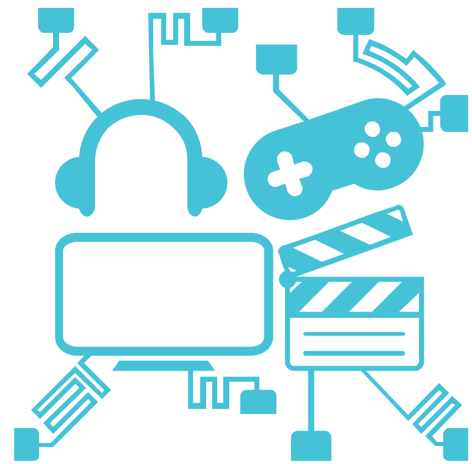


60% Read or send emails
48% Browse websites for personal interests
46% Visit social networking sites
43% Online shopping
42% Watch video clips on sites such as Youtube
39% Download apps for free
38% Online banking
32% Watch catch-up TV
24% Download/ stream music over the internet
14% Use the internet to make video calls (VOIP)

Base: circa 200 – 400 tablet owners per wave

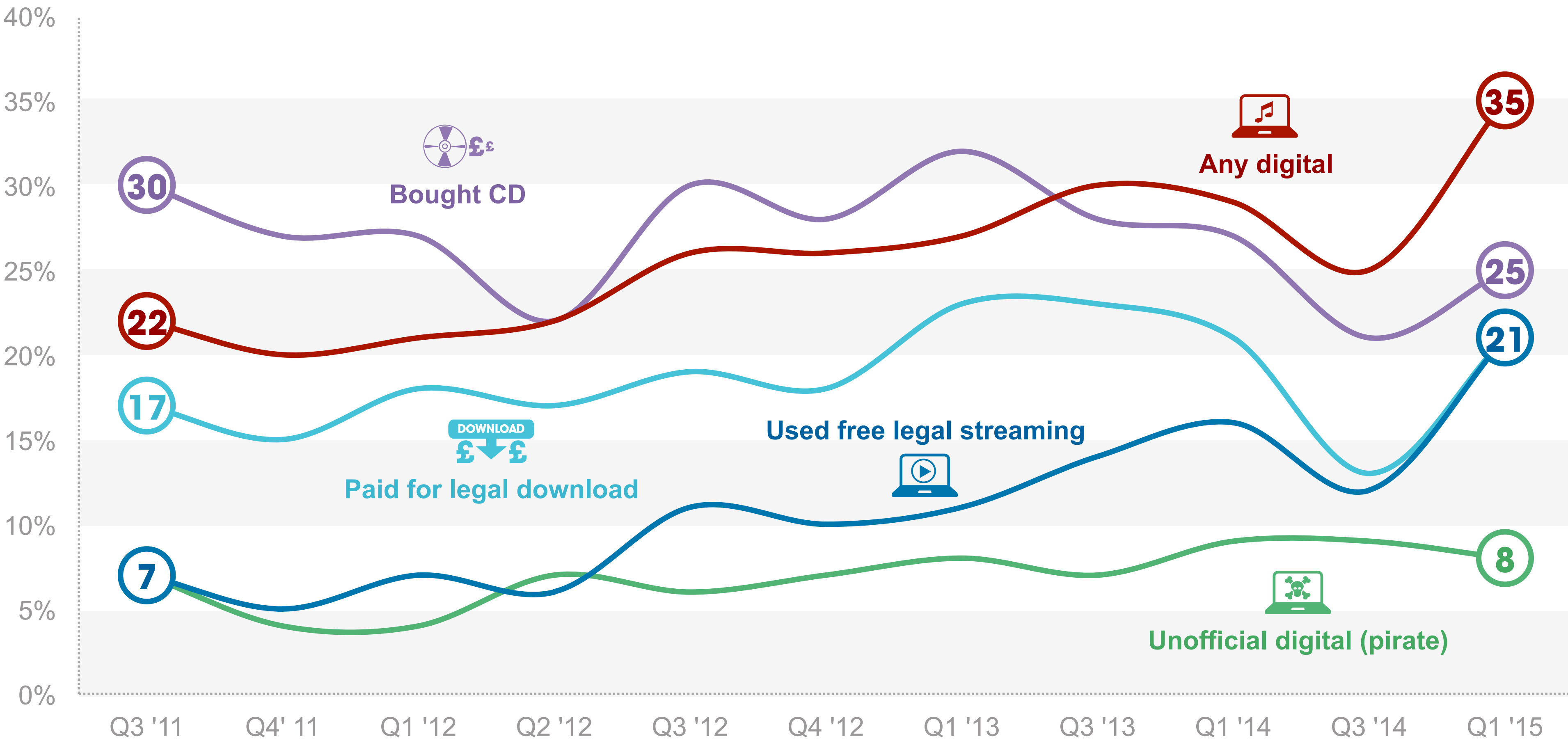
Source: Ipsos MORI

CONTENT CONSUMPTION
MUSIC / GAMES / TV / MOVIES



HOW WE CONSUME MUSIC

MUSIC CONSUMPTION

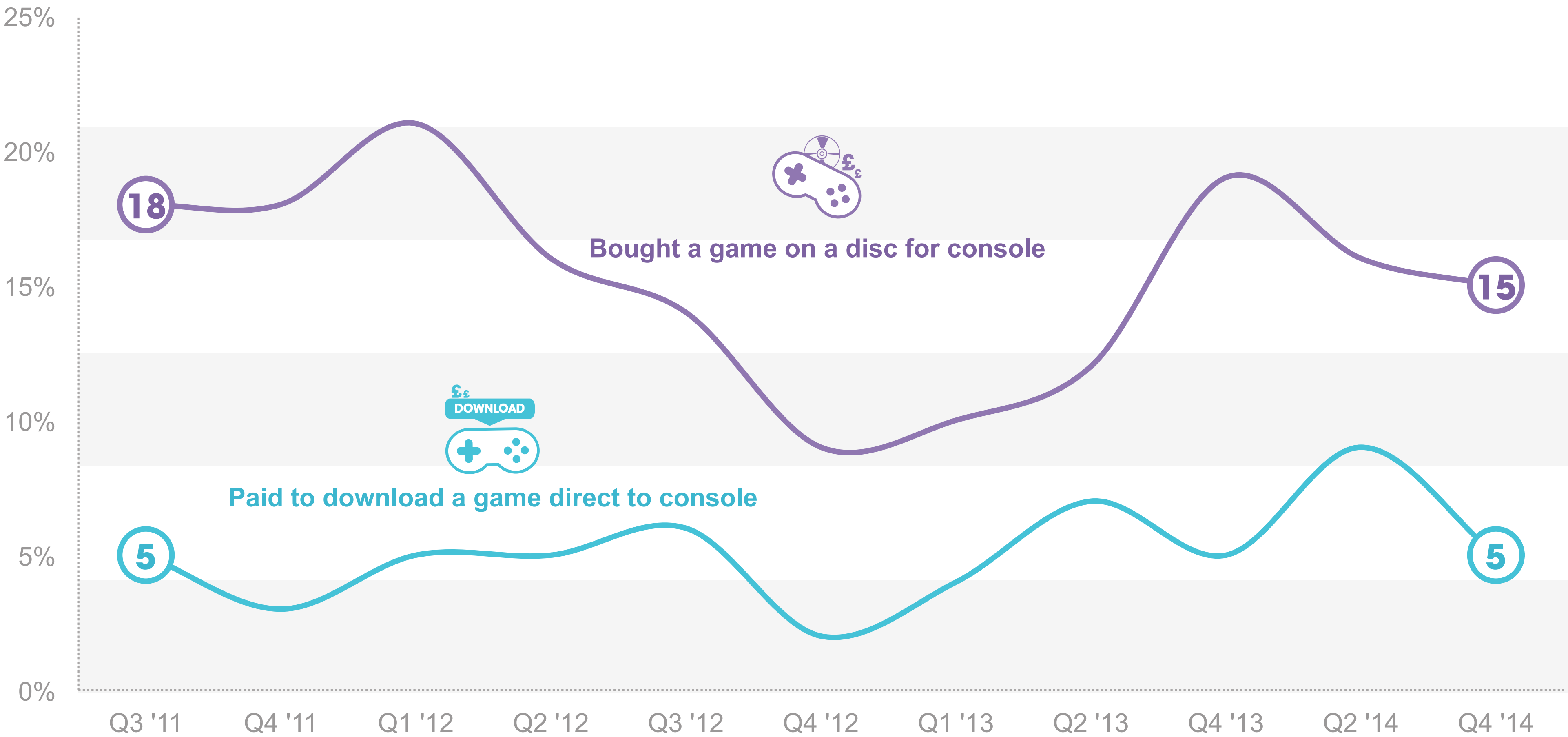


Base: circa 1,000 GB adults aged 15+ per wave / Music consumption is tracked every 6 months

Source: Ipsos MORI

HOW WE CONSUME GAMES FOR CONSOLES

GAMES CONSUMPTION

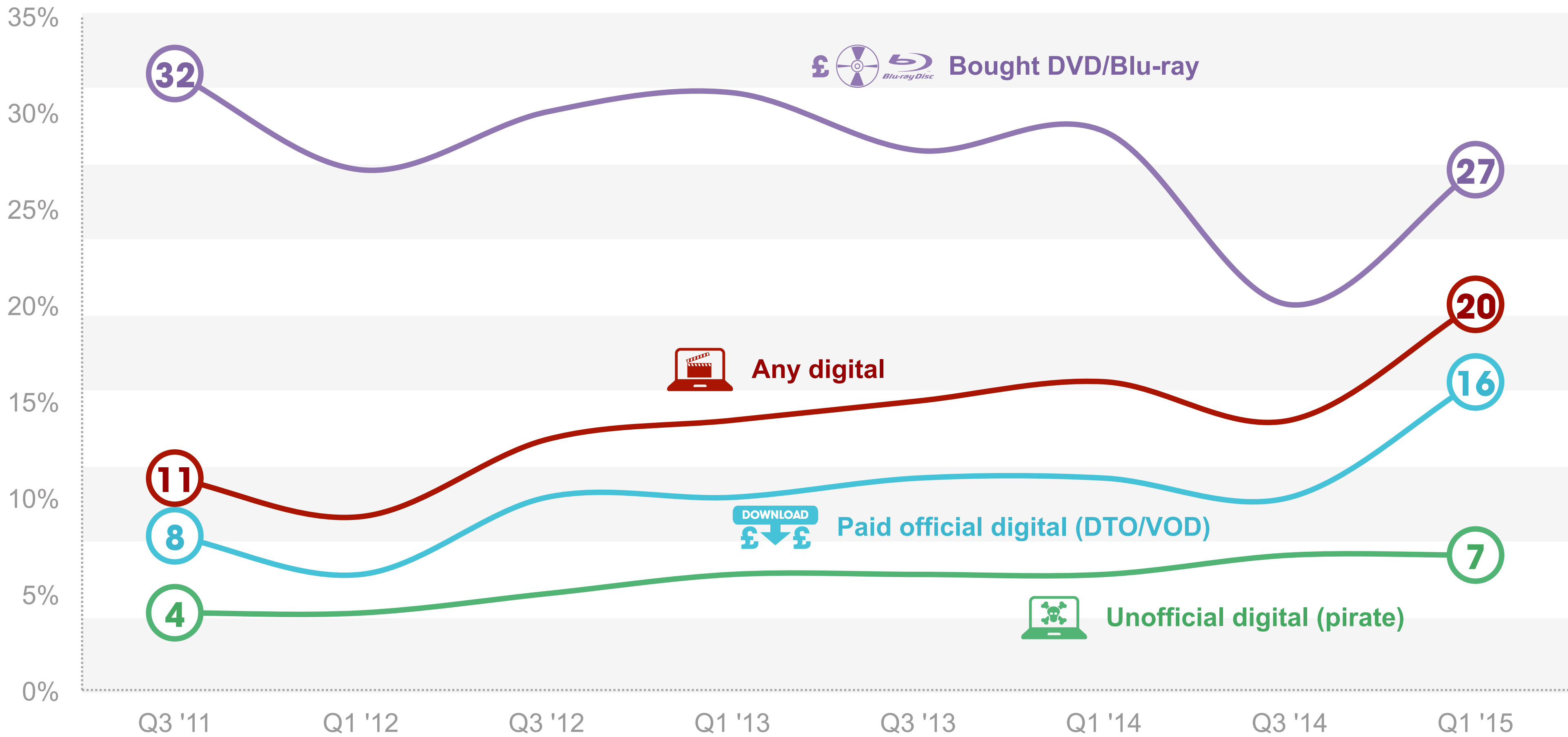


Base: circa 1,000 GB adults aged 15+ per wave / Games consumption is tracked every 6 months

Source: Ipsos MORI

HOW WE ACCESS MOVIES

MOVIE CONSUMPTION

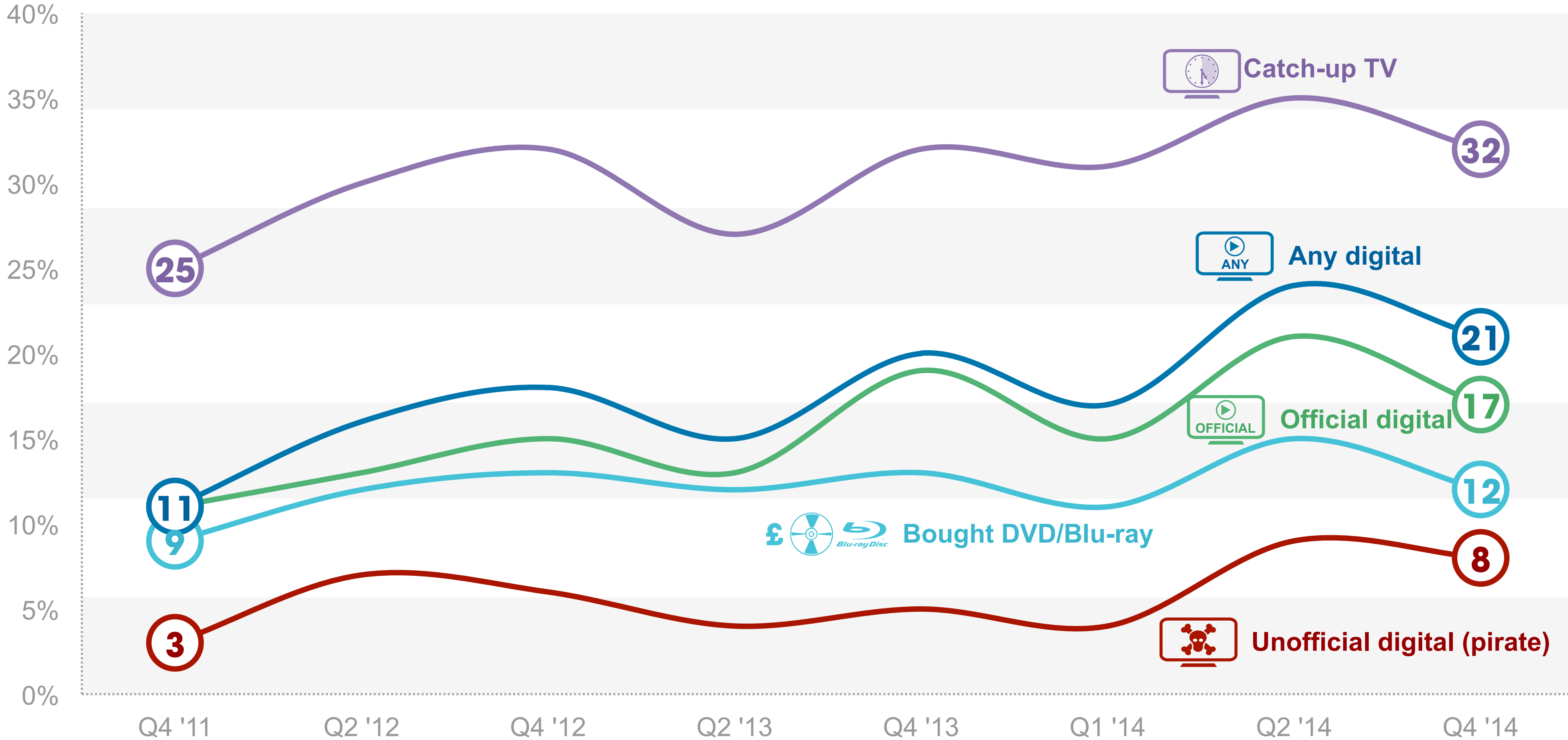


Base: circa 1,000 GB adults aged 15+ per wave / Movie consumption is tracked every 6 months

Source: Ipsos MORI

HOW WE ACCESS TV SERIES

TV SERIES CONSUMPTION



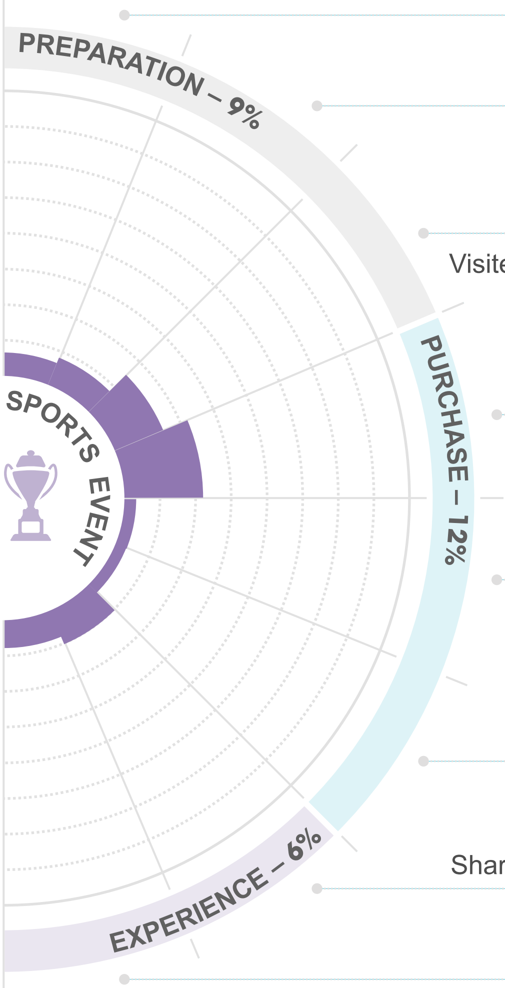
Base: circa 1,000 GB adults aged 15+ per wave / TV consumption is tracked every 6 months

Source: Ipsos MORI

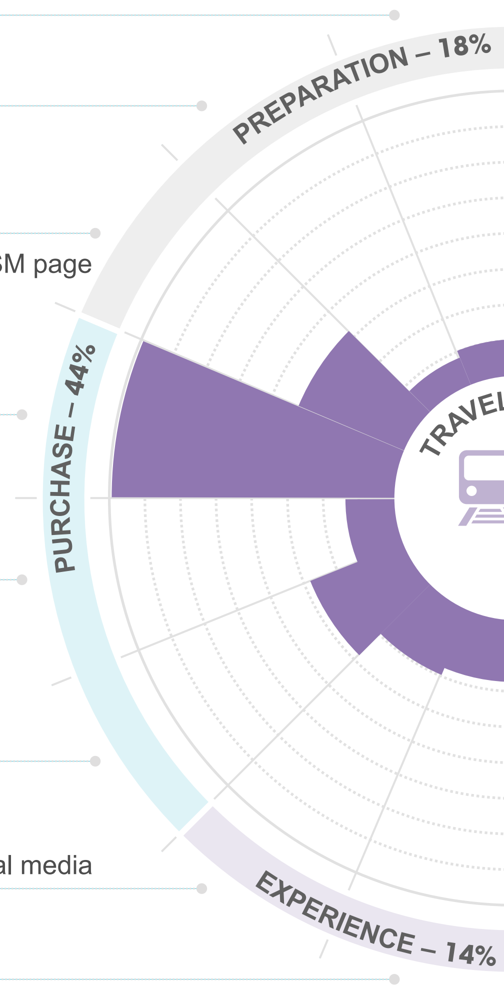
EVENT INTERACTION WITH TECHNOLOGY

EVENT INTERACTION WITH TECHNOLOGY

% USE AMONGST GB ADULTS VISITED EVENT IN LAST 3 MONTHS



Sports event	Activity	Travel
3%	Saw ad online	5%
4%	Commented on social media	4%
7%	Visited companies' website/SM page	16%
11%	Purchased ticket online	40%
2%	Purchased ticket via an app	7%
2%	Used paperless tickets	14%
5%	Shared photo/ video on social media	10%
4%	Commented on social media	8%

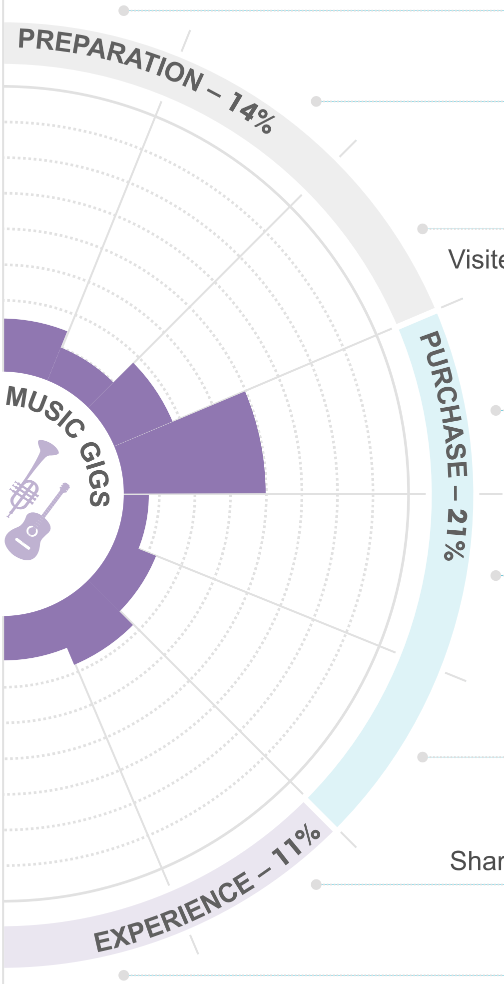


Base: GB adults 15+ who have - attended a Sports event in last 3 months (528), bought a ticket for travel in last 3 months (625)

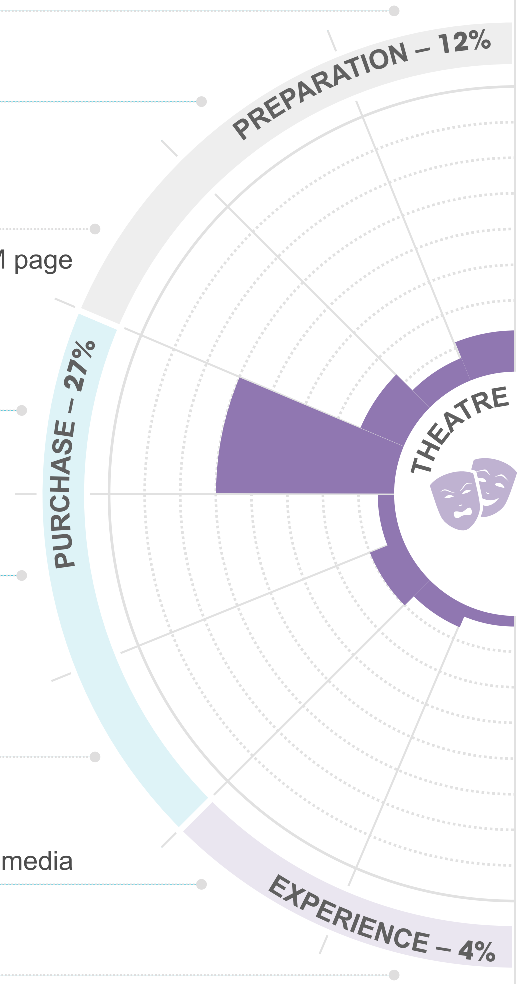
Source: Ipsos MORI

EVENT INTERACTION WITH TECHNOLOGY

% USE AMONGST GB ADULTS VISITED EVENT IN LAST 3 MONTHS



Music gigs		Theatre
7%	Saw ad online	6%
5%	Commented on social media	3%
9%	Visited companies' website/SM page	7%
20%	Purchased ticket online	25%
3%	Purchased ticket via an app	2%
6%	Used paperless tickets	5%
9%	Shared photo/ video on social media	3%
6%	Commented on social media	2%



Base: GB adults 15+ who have - been to a music gig in last 3 months (536), visited the theatre in last 3 months (551)

Source: Ipsos MORI

TECH TRACKER TECHNICAL DETAILS

Ipsos MORI interviewed a quota sample of **988 adults aged 15+ in GB.**

The latest interviews were carried out face to face **30th January – 8th February 2015.**

Data is Unweighted 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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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.

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