**Ipsos Connect**

# PASSIVE PERCEPTIONS

Thought Piece
2017

**15% OF SMARTPHONE USERS ARE GRAZING ON THEIR PHONE OVER A PERIOD EQUIVALENT TO HALF THE DAY**

**Mobile devices now account for over 60% of time spent online, making smartphones and tablets an important focus for digital advertisers and researchers alike.**

The TouchPoints 2017 passive data captures a daily average of 104 minutes of app and website use via smartphone and 61 minutes via tablet, with 15% of smartphone users grazing on their phone over a period equivalent to half the day.

However, the survey data demonstrates that these devices, smartphones and tablets, do not experience the same patterns of usage. Whilst the time per user spent on websites is the same on both devices, app usage via smartphones is nearly twice as high as on tablets.

The IPA's TouchPoints Daily Life survey has incorporated passive measurement of both smartphones and tablets in all three annual surveys since 2015, and illustrates well how passive data can complement survey data to give a rich picture of online use in the context of other media consumption, daily activities, location, and mood.

The main benefit of passive metered data is, of course, its granularity and detail. Without placing any significant additional burden on survey participants, it delivers moment by moment data for each device and

Online

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differentiates between apps and websites. This is an obvious advantage over traditional survey research, particularly in representing the way we snack on news and social media on our mobile devices. Few of us would be able to recall retrospectively (or report fully in a diary) the many times that we go online on our mobile devices throughout the day.
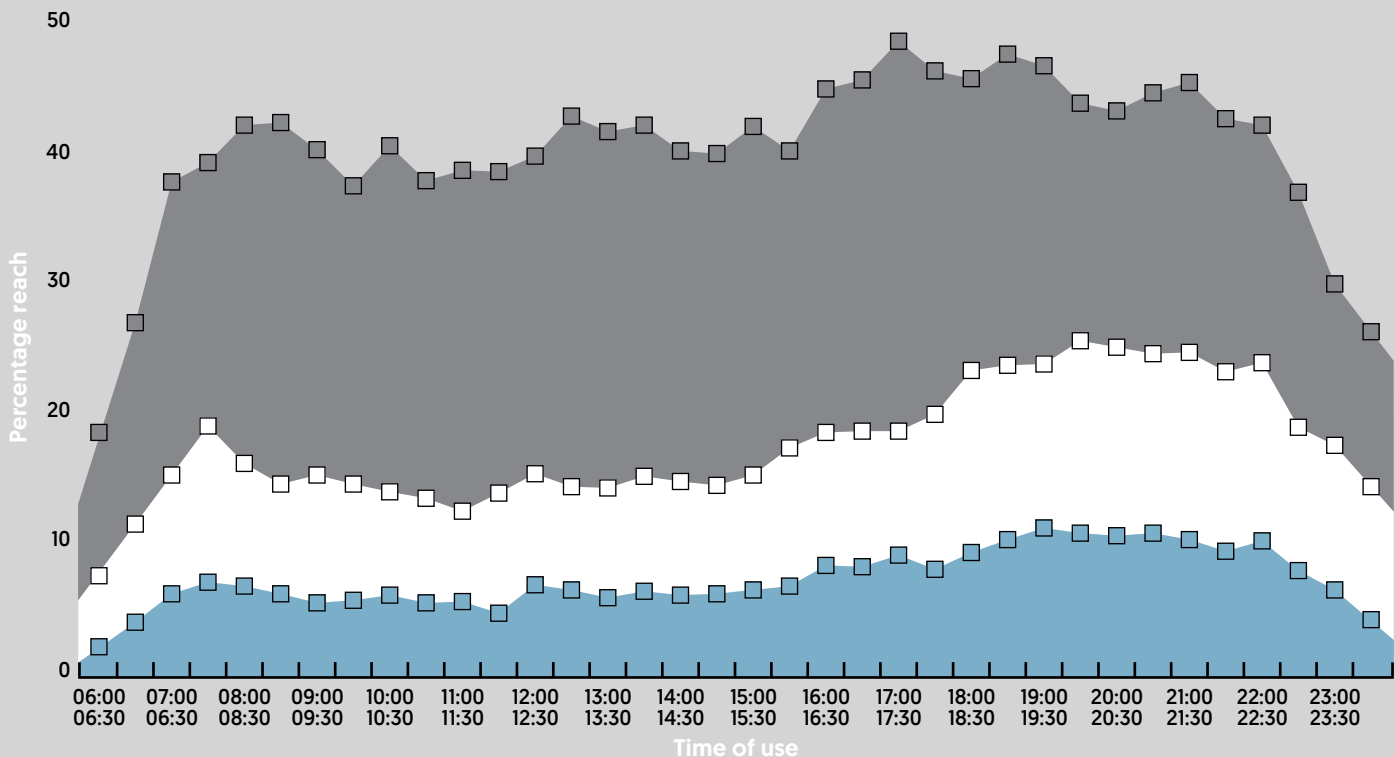
Those with both a smartphone and a tablet use their phone just as much on an average day as those without a tablet, clocking up an average of nearly 2 hours and 45 minutes per day across the two devices.
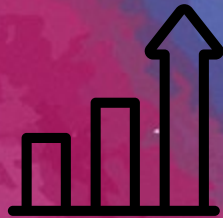
Tablets don't appear to add significantly to app repertoire. Of the 7 (mean 7.4) apps used on the tablet, half on average are also used on the phone. So, for a tablet owner, the app repertoire extends from 14 (mean 13.9) on the phone to 18 (mean 17.6) across both devices.

## REACH OF ONLINE MOBILE BY DEVICE ON A WEDNESDAY IN THE DIARY WEEK
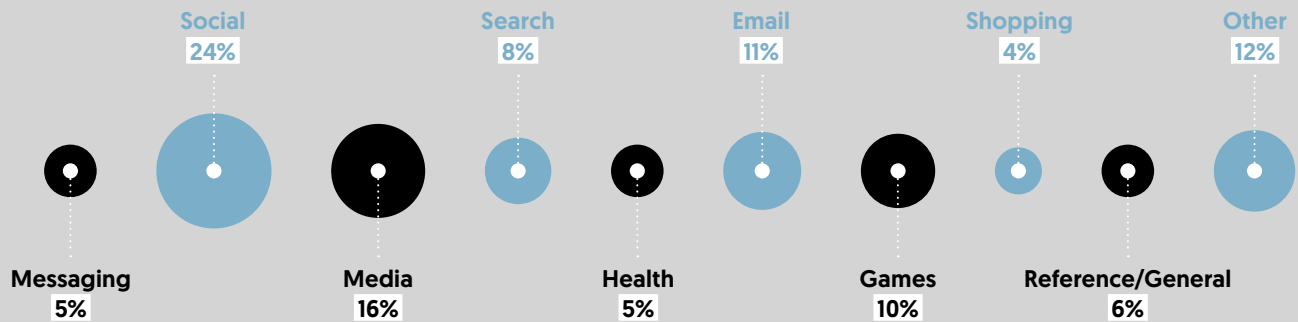
Base all with both devices

■ Smartphone  □ Tablet  ■ Both devices in same half hour

Percentage reach

50

40

30

20

10

0

06:00 06:30 | 07:00 06:30 | 08:00 08:30 | 09:00 09:30 | 10:00 10:30 | 11:00 11:30 | 12:00 12:30 | 13:00 13:30 | 14:00 14:30 | 15:00 15:30 | 16:00 16:30 | 17:00 17:30 | 18:00 18:30 | 19:00 19:30 | 20:00 20:30 | 21:00 21:30 | 22:00 22:30 | 23:00 23:30

Time of use

SINCE LAST YEAR WE CAN SEE THE RAPID GROWTH OF INSTAGRAM WHILE OTHER SOCIAL MEDIA SITES HAVE PLATEAUED

# SHARE OF SMARTPHONE TIME BY GENRE

**Social** 24%

**Messaging** 5%

**Media** 16%

**Search** 8%

**Health** 5%

**Email** 11%

**Games** 10%

**Shopping** 4%

**Reference/General** 6%

**Other** 12%

In line with the time spent on apps and websites on the two devices, while the weekly app repertoire on tablets is significantly lower than on phones, the website repertoire on tablets is almost as broad.

With over 2 million apps available in each of the Google Play and Apple app stores, it's inevitable that this diversity will make each user's repertoire quite distinct. Over 95% of time spent on apps and websites has been categorised, and individual brands are identified where there are 30 or more users in the diary week, so that passive metering allows us to capture the full repertoire in a way that would be near impossible with conventional research.

For both phone and tablet, around 60% of time online is spent across social, games, email, and media. But, within these broad categories we see that email and social media are more significant within the phone repertoire, whilst gaming and media have a higher share on tablets, as well as having quite different patterns of use across the day.

## CAPTURING TRENDS

The TouchPoints passive data captures trends both for media and for broader lifestyle. For example, since last year we can see the rapid growth of Instagram while other social media sites have plateaued, and the passive data also confirms the growth of online newspaper and magazine readership.

Other emerging categories are the online delivery market, mobile payment apps, and fitness/health monitoring apps, together with the social shopping/classified apps (such as Shpock) and connected home apps (such as Hive), both of which feature in our data for the first time this year.

**PASSIVE DATA IS AT ITS MOST POWERFUL WHEN COMBINED WITH ADDITIONAL DATA FROM THE SAME PARTICIPANTS**

Although its popularity is said to have peaked last summer, at the time of TouchPoints 2017 we found that 6% of smartphone owners were still playing Pokémon Go in the diary week. This places it ahead of Candy Crush, which has consistently been the top gaming app in previous TouchPoints surveys.

## THE POWER OF ADDITIONAL DATA

The TouchPoints passive data has been carefully reformatted to match a week in which participants have filled in a diary of their activities, circumstances and mood for each half hour of the day. Subscribers are able to cross-tabulate offline activities with the passive data to obtain insights into the way that online works with other media.

Once matched to the full TouchPoints data, the passive data can be explored in detail by all demographic subgroups and users can choose from hundreds of profiling variables in the main survey data to explore how offline behaviour, lifestyle, and attitudes inter-relate with online mobile.

Other bespoke surveys for our clients have illustrated how passive data is at its most powerful when combined with additional data from the same participants.

- We have collected passive data from devices used while watching TV to explore the relationship between attention to the TV screen and detailed online activity in the same moment.

- An outdoor client asked us to analyse the on-device behaviour of a sample of respondents who were known to have recently been exposed to specific outdoor frames. The Outperform study for Outsmart illustrated that Out-of-Home (OOH) activity drives +17% uplift in smartphone brand actions.

WE AIM TO DISTIL
THE LARGE AND
DISPARATE "BIG DATA"
FILES INTO A DATASET
THAT CONTAINS ONLY
WHAT IS NEEDED

- A sponsor of a major sporting event asked us to use mobile passive data with event based triggered survey data for the same sample to better understand how people watch big sporting occasions, and how mobile can be an enabler to further enjoying such events.

Despite its many advantages and apparent simplicity, it won't come as a surprise to most to learn that collecting passive data is far from straightforward. Through years of working with passive data we have developed a detailed taxonomy with which to comprehensively classify apps and web domains, and a strong understanding of compliance issues and the challenges of the different operating systems.

We aim always to combine our knowledge of passive data with our skills as researchers to distil the large and disparate "big data" files into a structured dataset that contains only what is needed to answer your objectives.

## FOR MORE INFORMATION PLEASE CONTACT:

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Judith has nearly thirty years' experience of media research. She has been the Ipsos Project Director for the IPA's TouchPoints surveys in recent years, but also has hands-on experience of all our other audience measurement contracts.

Judith is an expert in Passive Measurement with in-depth understanding of passive metering using apps.

# Ipsos Connect

## ABOUT IPSOS CONNECT

Ipsos Connect are experts in brand, media, content and communications research. We help brands and media owners to reach and engage audiences in today's hyper-competitive media environment.

Our services include:

- **Brand & Campaign Performance:** Evaluation and optimisation of in-market activities to drive communications effectiveness and brand growth.
- **Content and Communications Development:** Communications, content and creative development from early stage idea development through to quantitative pre-testing alongside media & touchpoint planning.
- **Media Measurement:** Audience measurement and understanding.

Ipsos Connect are specialists in people-based insight, employing qualitative and quantitative techniques including surveys, neuro, observation, social media and other data sources. Our philosophy and framework centre on building successful businesses through understanding brands, media, content and communications at the point of impact with people.