



The Tablet Evolution

Bite Sized Thought Piece

2013

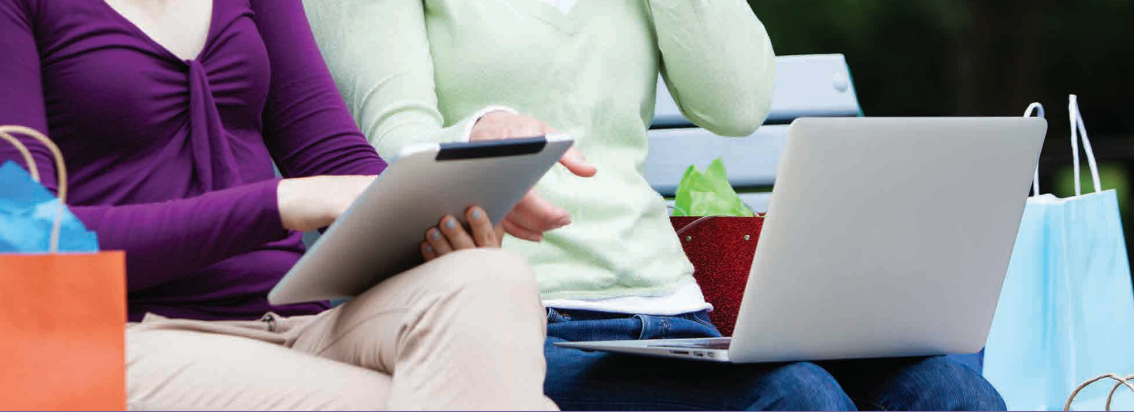
The tablet has come a long way since its mainstream launch in 2010 and ownership now stands at one in four households in Great Britain (Ipsos MediaCT Technology Tracker, January 2013). The tablet has entered the family environment and become a 'shared screen' to be passed around for all to use, often resulting in little sticky finger-prints by the end of the day. This can lead to the tablet becoming littered with content and apps that appeal to a broad demographic of users within the home. Organising and managing such an array of apps on the device can be frustrating, and whilst fun to share, it has since created a desire

for multiple members of the family to have one, each for their own preferred usage. This explains why even after Christmas, 10-15% of those who already own a tablet intend to buy a second in the next 12 months.

BECOMING MAINSTREAM

Tablet use is also evolving as the device moves into the mainstream. The tablet is used primarily for communication and entertainment, with most popular uses including watching video on demand, emailing and general surfing. As the market matures, more and more owners of tablets also use them to





shop online, perhaps indicating a higher level of trust and security with tablets. But whilst the tablet is shared, the smartphone becomes more individual. We have found that over half of Smartphone users access social networks on their smartphone (compared to 45% of tablet owners), and instant messaging is predominantly performed via smartphone (32%) over tablet (20%).

On the flip side, a fifth of the population prefer to use their shared larger screen to engage in VoIP (voice over Internet Protocol) and video conferencing services, whilst only 1 in 10 use video call via their Smartphone.

MULTISCREEN ENVIRONMENT

The same distinctive behaviours can be observed when looking at desktop and laptop computers versus the tablet. To date people have used their tablets in conjunction with their trusty laptop or desktop, sometimes using it as a second screen or an accessory when working. However, with the technological advancement of tablets, we are starting to see a shift in behaviour between desktop or laptop computers and the more convenient tablet.

When choosing to watch short video clips or catching up on TV

programmes, people are equally likely to choose a tablet as they are a laptop or desktop, a significant shift from historical trends. In many ways, a tablet is becoming a mini-TV, while a smartphone takes the place of a communicator. This complex ecosystem is further complicated by new devices, such as phablets taking up the (somewhat small) middle ground between smartphones and tablets. A phablet serves the purpose of both the tablet and a Smartphone, just the right size for making calls, messaging and using it as a personal device and perfect for using the stylus pen to edit photos, watch videos, social network and sharing.

IN VS OUT-OF-HOME

The tablet has traditionally been a device which is largely used only in the home, but with new mini versions, will this still be the case by the end of the year? Smartphones are always on and always with you, as important as keys and wallet as one leaves the front door. Taking the tablet out, however, is a more considered choice, as it could be a useful thing to take with you, but can equally be just as inconvenient. 'Usefulness' is a key driver as to whether or not it is likely to leave the home, whether it is a distraction for the kids in the car, or something to kill time between chores.

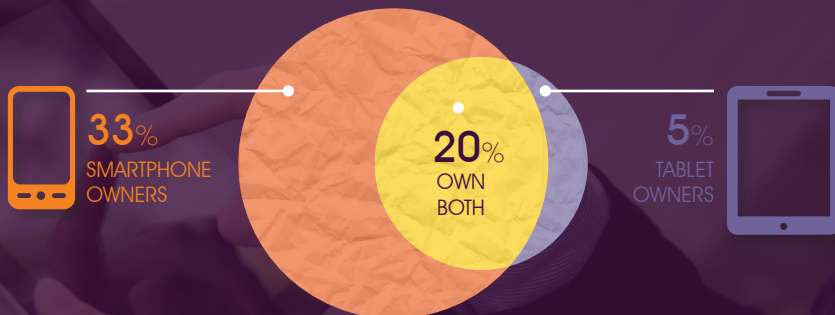


While on some days the decision may come down to the size of handbag being taken out that day, on others it might be governed by whether the tasks performed are likely to require a network connection. Clearly 'wifi only' connectivity is a significant barrier to taking the device outside, and for some the benefits of portability are utilised as it is taken from room-to-room within the home.

SIMILAR CONTENT DIFFERENT CONSUMPTION

In terms of media consumption habits, this varies dramatically by device. With 20% of households

owning both a smartphone and a tablet it is interesting to see that whilst consumers have around 40% of the same apps on their smartphone and tablet, we have seen from passive metering of behaviour that the same content is consumed in very different ways. Whilst engagement (the total length of time viewing the content) is broadly similar across a month on either device, smartphone usage tends to be more frequent short bursts of content consumption, whilst tablets are used less frequently but for longer. These noticeable behavioural differences have significant implications for content providers and advertisers alike.





SEAMLESS SWITCHING

One thing is for sure, consumers are accessing an increasingly wide range of content and communicating with each other via a multitude of different devices, and constantly switching between them. Often the apps and content accessed are the

same but the device used is driven by the situation and/or location. Brands that can help the consumer make this switch seamlessly, and access content easily, will be the most appealing and likely to be the most successful in the future.

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