

# Connected behaviour

The Touchpoints 4 survey highlights how different age groups connect to the internet, through which devices and at what time of day

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The way we access the internet and what we use it for is evolving rapidly. The latest IPA TouchPoints 4 Survey's unique time diary data helps reveal how devices are used these days with insights on how things might develop in the future.

Those who are connected are using an average of five different devices to access the internet each week. PCs and laptops are still the most used device for accessing the internet, however, use of smartphones is growing fast with 30% now using a smartphone to access the internet.

Despite the hype, tablets (including iPads) are currently only used by 5% of the British adult population in a week. Indeed, people spend marginally more time online using games consoles. Take-up of internet-enabled (Connected) TV sets is also still relatively small with only 3% of adults using them.

Tablets are more likely to be owned

by those aged 35-54, rather than the early adopting 15-24s. This is no doubt driven largely by the cost of tablets. This pattern is also reflected in the social grade profile of tablet owners, with ownership heavily biased towards ABs.

Tablet ownership also has a distinct regional bias towards London (11%), the North West (10%) and, interestingly, North Scotland (9%). You are much less likely to own a tablet if you live in the East of England (7%) or the Midlands (6%).

If tablets are the preserve of the 35-54s, then the smartphone is the growing internet device of choice for 15-24s, with two-thirds of them now owning a smartphone; 15-24s still spend three-quarters of their internet time with a laptop or PC.

Clearly, we use different devices according to our geographic situation and our reason for wanting online access. As would be expected, this differs widely across the day. PC/laptop use is strongest during the day when most users will be using a work computer. However, when people are on the move, the choices are different. Choice will also be governed by the task in hand and the device available: 20% of internet time spent on a PC/laptop is spent with email; 30% of mobile phone internet time is spent social networking or IM; and 30% of internet-enabled TV internet time is spent downloading content, watching television, listening to radio, music or podcasts, looking at newspaper or magazine content sites or watching video.

Looking at the 'flow' across the day, our use of internet-enabled devices is governed very much by where we are and what we are doing. PC/laptop still takes the lion's share of our internet hours, especially when we are at work. Early morning is more dominated by mobile phones and tablets. Indeed, mobile phones are widely used for most of the first half of the day until lunchtime. Use of tablets

and games consoles comes into their own later in the evening. Peak times for using games consoles are from about 6.30 pm onwards.

For 15-24s (Figure 1), using games consoles to access the internet peaks at breakfast, then lunchtime and into the afternoon, with the highest level of use mid-evening. It is difficult to get a robust reading of the usage of internet-connected television due to their very small penetration.

For 25-44s, the flow of device use is different again. Tablets feature first thing in the morning and into commute time and again in the early evening commute and early evening home time. PC/laptop use is largely during the morning and games console use in the evening to late evening. Access to the internet via mobile phone is at its heaviest during the morning up until lunchtime.

We can also look at what people are using the internet for. Email still dominates as our main activity on the internet. It peaks for all adults between 8.30 and 12 noon on an average day. Using the internet for work is the next biggest activity, peaking during working hours. This is followed by general surfing and browsing which builds across the day, but peaks at around 9pm in the evening. Social networking comes next, also peaking at 9pm in the evening; 8pm and 9.30pm is our busiest internet time with peaks for playing games, watching television, instant messaging and watching video clips and movies.

For 15-24s, social networking is the activity that they spend the most time doing, with a strong peak at lunchtime and building to its highest level at around 7pm in the evening. This is followed by general surfing and browsing, which again peaks in the evening between 7pm and 8pm. Using email is much less than it is for all adults, and peaks at around 11.30 in the morning and again at 4pm in the afternoon. Playing games is at its

FIGURE 1

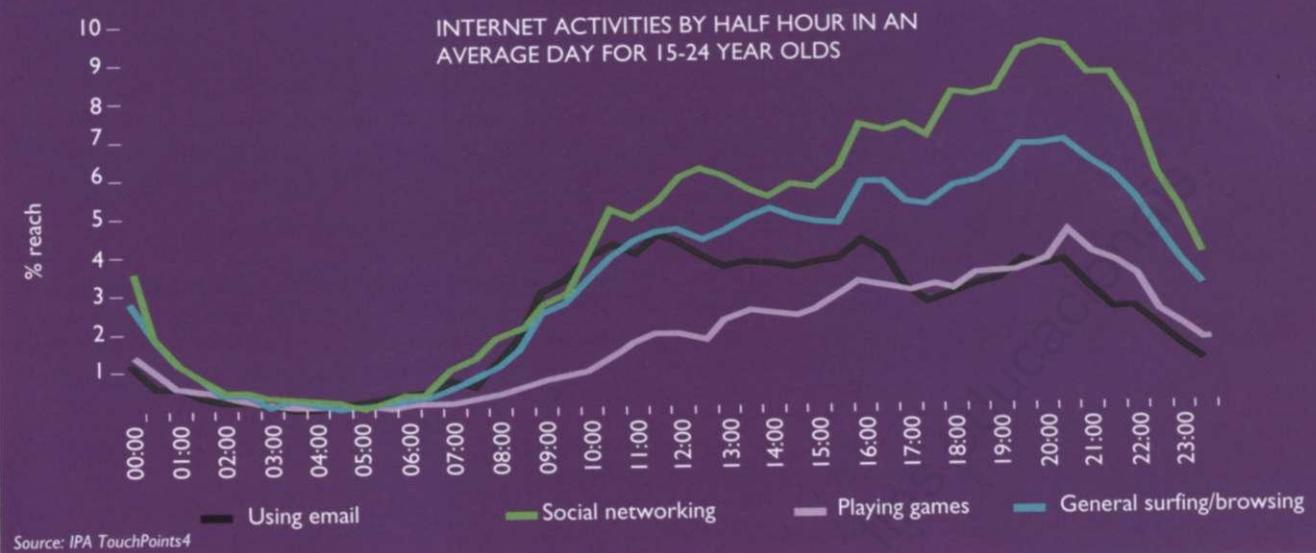
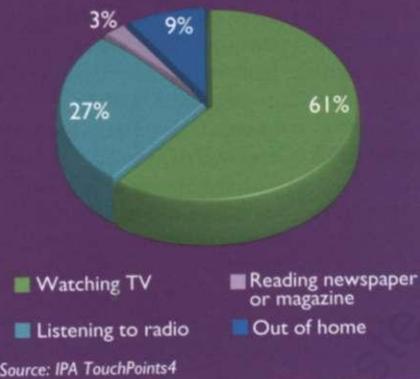


FIGURE 2

USING THE INTERNET AND OTHER MEDIA IN SAME HALF HOUR – ALL ADULTS 15+



highest level in the evening at 8.30pm, but still comes in third place after social networking and general surfing and browsing.

We are all multi-tasking more than ever these days and it is certainly true that much of our 'connected' time happens at the same time as other events and activities. We can look at how other media is used at the same time as the internet (Figure 2). Not surprisingly, radio and television are both strong channels for simultaneous use with the internet. Looking at the total share of time spent using the internet and other media at the same time, television has the highest share at 61%. Listening to the radio

comes in with a 27% share.

Accessing the internet while eating and drinking is very common, with peaks for this activity particularly around lunchtime during the week. What else are we likely to be doing whilst using the internet? Working takes a large proportion of the share of time but relaxing is also high - so perhaps when people are relaxing, they are in the right mindset to be 'connected'.

So how connected are we these days? TouchPoints shows us that we are connected for 24 hours a day, but the major activity takes place from 8.30 in the morning until 10.30 at night. Across this time, we use a range of devices determined by ownership, location and age. While tablet ownership is still relatively small - it is growing rapidly and it will be interesting to see if smartphones remain the personal device of choice for the young, or if, increasingly, tablets will become their connected tool of choice as prices inevitably reduce. Similarly, at the opposite end of the age range, it might be that those who are yet to embrace the internet will find tablets easier to use.

Attitudes to the internet are polarised by age. Younger people tend to be very open to participating in whatever the internet can offer them. For example, they are more than twice as likely to agree (vs. all adults) that they like to participate in live online chats about TV programmes they are watching. They are twice as likely (vs. all adults) to agree that they find online ads more

interesting if they can interact with them. Older age groups are more sceptical. Nearly 20% of all 55+ internet users agree that they would not use the internet to buy things as they are too concerned about internet fraud. Over half of them agree that they only tend to go online when they need to get something specific done. So if we are to become a fully connected nation, work has to be done with the disconnected and the sceptical. The question remains as to whether solutions will be offered by more technical developments or by other social pressures.

A key factor in the further development of the internet is the attitude to privacy; 67% of those who have used the internet in the past three months agree that they are concerned about companies tracking what they visit on the internet. Nearly half of internet users (48%) agree that they delete the cookies on their PC on a regular basis. However, they are also 20% more likely than adults, in general, to trust the advertising they see on the internet.

The latest TouchPoints 4 survey clearly demonstrates the rapid changes that are taking place in how and where people use the internet. The speed of these changes can only accelerate in the future, further changing the way we behave and how we consume media.