

A DAY IN THE LIFE: TRACKING E-READER AND TABLET OWNERS' ACTIVITIES AND PATTERNS OF USE

Risa Becker, Jay Mattlin, Dr. Julian Baim, Dr. Michal Galin, Matthew Pittsinger, Aaron Lipman, GfK MRI

Introduction

As mobile devices such as the Apple iPad and a variety of e-readers grow in sales and usage, demand for information about how consumers interact with these devices increases. Tablets are unique in that almost all forms of traditional media can be consumed on these devices. Consumers use them to watch TV and movies, listen to the radio, access the Internet and read books, magazines and newspapers. E-readers, too, are increasingly becoming multi-media devices. Accordingly, publishers, agencies and all those intending to advertise to these consumers seek information about how consumers are engaging with e-reader and tablet devices.

This paper provides a snapshot of owners' current behavior with e-readers and tablets, based on two surveys of a pre-recruited panel – one on usage of these devices in general and one about their tablet or e-reader activities by daypart in a 7-day diary study. Through these surveys, we can begin to explore the degree to which the usage of these devices resembles or differs from the use of other media and, concomitantly, the degree to which usage of these devices may affect the usage of other media. In addition, this research reveals implications for future efforts to estimate audiences for what we think of as “traditional media” on these new delivery platforms.

Background

In recent years, and especially since the iPad's launch in April, 2010, publishers and agencies have attempted to understand consumers' adaptation to e-readers and tablets in principally in three ways:

- Electronic tracking data from tags embedded within apps;
- Surveys of e-reader and tablet owners, often administered on the device;
- Qualitative research, either in groups or in one-on-ones.

To date, there have been few explorations of tablet activities that take into account the full range of potential activities on a tablet, including the Internet, apps, and built-in functions by time of day and day of week (weekday vs. weekend). Even less is known about patterns of e-reader usage. As the provider of the U.S. print currency and of a single source media database, GfK MRI believes it critical to understand as much as possible about the full range of consumption behaviors and attitudes of tablet/e-reader owners. Thus, we recruited a panel of individuals comprised of e-reader and tablet owners, a portion of whom are respondents re-contacted from our National Study.

This paper draws on surveys of these panelists to address the following questions:

- For which activities are tablets and e-readers most commonly used -- including where magazine and newspaper reading fall among these uses -- and how do they differ by demographic group?
- How do patterns of usage differ by weekday vs. weekend, daypart, and demographics, and how do these patterns compare to usage patterns for other media?
- Do tablets and e-readers affect the consumption of other media and the execution of other activities and if so, how?
- Are tablet and e-readers primarily employed as individual devices or are they shared among household members?

This paper is an introduction to these topics and lays the groundwork for future, more in-depth analyses. While we recognize that there are many more issues of interest with regard to tablet and e-reader usage, we are limited by fieldwork timing and processing constraints to discussion of the issues above.

Sample Design and Methodology

The panel was developed from two separate sample sources: 1) recontacts of GfK MRI's National Study respondents, supplemented by 2) a group of independently recruited panelists from a company called Hispanispace that specializes in recruiting and managing online communities for research,. (The name notwithstanding, Hispanispace does both Hispanic-focused and general population community recruitment.) The National Study respondents were individuals who had participated in a National Study personal interview some time between March 2009 and April, 2011. They were identified as likely owners of a tablet or e-reader in one of two ways: 1) they responded affirmatively to a question about e-reader or tablet ownership as part of the National Study personal interview or 2) they responded affirmatively to the ownership question in one

of several mailed recontact studies. At the beginning of recruitment, GfK MRI identified 2,819 individuals who had reported in a previous study that they owned either an e-reader or a tablet. The panel was recruited by phone from June 7, 2011 to July 7, 2011. For those respondents for whom we had an email address and could not reach by phone, we sent a recruitment email.

Respondents who agreed to join the panel were asked to provide their email address and were contacted by email the next day with a link to an online intake survey. They were told that they would be asked to participate in surveys online, approximately monthly, and that incentives would vary with the length of the survey.

We also decided to supplement our panel with e-reader and tablet owners recruited by Hispanispace. This was done for two reasons. First, since the National Study respondents were somewhat skewed toward e-reader owners,¹ Hispanispace participation was intended to obtain a more balanced number of e-reader and tablet owners in the sample. Second, we wanted a higher intab overall.

Hispanispace recruited their panelists from proprietary sources. Their recruits were invited to take part in surveys, as well as be part of a community of e-reader and tablet owners. Hispanispace panelists were incentivized less generously than the National Study respondents, but they benefited from being part of the community. Many of these panelists are enthusiastic and engaged, participating in qualitative surveys and discussions, in addition to the online quantitative surveys. Hispanispace guaranteed a minimum number of completions and replenishes the panel as necessary.

The data in this paper come from two surveys administered to the panel, fielded between June 8, 2011 and August 30, 2011. The first survey, the “intake,” included the following questions:

- Brand of tablet or e-reader owned
- Length of time owned
- How respondents learned about apps
- Number of apps owned, downloaded and amount spent
- Types of apps used
- How tablet or e-reader usage affects use of other media
- Attitudinal questions concerning respondents’ feelings about their tablet and/or e-reader.

The second survey was a week-long diary study, designed to capture “a day in the life” of the panelist with respect to his or her tablet and/or e-reader usage. For this survey, respondents were asked each day, by daypart, to record their tablet and/or e-reader usage behavior. Variables collected were:

- Tablet or e-reader activities done
- Time spent on each activity
- Location during activity
- Whether the activity was “shared” (i.e. done together with another person) and
- Whether respondent did any other activity (e.g. eating, watching television, etc.) concurrent with device usage.

We attempted to re-contact, first by email and then by phone, all National Study respondents who did not respond to the initial post-recruitment, emailed invitation. In addition, to increase participation and to foster good will among respondents, GfK MRI sent the intake survey incentive, where possible, by overnight mail. Similarly, we also re-contacted, by both email and phone, potential diary participants who had not yet started the diary surveys.

Panelists who had both an e-reader and a tablet (approximately 27% of the panel) were asked to fill in one diary for each device. Panelists who happened to have two e-readers or two tablets were instructed to choose the one device they used most often and complete the diary for that device. Start dates were staggered (Monday, Wednesday, Saturday starts) to minimize the effects of panel fatigue. Panelists were counted as in-tab if they filled out diaries for at least 5 of the 6 dayparts for at least 4 weekdays and 1 weekend day. We found that most panelists that qualified as completed diary interviews, did, in fact, complete all 6 dayparts for all 7 days.

While there are currently too few National Study respondents to weight and project, the data may become projectable in the future with additional recruitment from future National Study samples. As the incidence level of tablet and e-reader ownership in the population grows and we continue to recruit new panelists, it is our intention to phase out Hispanispace panelists. It should therefore be noted that the results of these early panel studies should be viewed as suggestive/directional at this time.

¹ The e-reader ownership question was introduced into GfK MRI’s National Study in March 2009, but the tablet ownership question was not introduced until September, 2010. Although the mailed recontact was intended to capture tablet ownership from respondents interviewed before the introduction of the tablet question, only a portion of National Study respondents (approximately 30%) complete the recontact surveys. This, along with the fact that tablet incidence in the population still lags behind that of e-readers (source: GfK MRI’s Survey of the American Consumer, Spring, 2011), meant that we expected the National Study respondents to yield a greater number of panelists who owned e-readers than owned tablets.

Sample Disposition and Demographics

The field dispositions and the final intab counts for each of the two surveys are below:

		Sample Source		Total Sample
		National Study Recontact Respondents	Hispanispace Respondents	
Initial Recruitment	Initial Sample	2,819		
	Less: Total Ineligible	626		
	Total Eligible	2,193		
	Agreed to join Panel	497		
	Cooperation Rate	22.7%		
Intake survey	Intake survey Completes			
	Total	421	2,702	3,123
	E-Reader	193	1,966	2,159
	Tablet	302	1,510	1,812
	Intake completion rate	84.7%		
7 Day Diary	Diary survey Completes*			
	Total	293	601	894
	E-Reader	210	347	557
	Tablet	133	429	562
	Diary completion rate (of Intake completions)	69.6%	22.2%	28.6%

*Note: Since data processing was incomplete at the time of this paper's writing, there is still a small percentage of respondents who are not included in these preliminary results. The intab numbers above include only those respondents processed and included in the analysis in this paper. Therefore these figures do not reflect the diary survey's final completion rate.

The data presented below are based on 3,971 intake interviews with 3,123 respondents and 1,119 diary surveys with 894 diary respondents. Both data sets include a portion of respondents who completed surveys for both devices.

We also examined the distribution of demographics in the sample to determine whether these might have an effect on survey results. The following table shows the breakdown by sex and age of the diary respondents, compared to known, weighted distributions from our National Study.

Demographics	Tablet			E-Reader		
	7 Day Diary	7 Day Diary	GfK MRI National Study Spring 2011	7 Day Diary	7 Day Diary	GfK MRI National Study Spring 2011
	Intab	% of Tablet Owners	% of Tablet Owners	Intab	% of E-reader Owners	% of E-reader Owners
Male	237	42.2	53.7	201	36.2	38.2
Female	325	57.8	46.3	355	63.8	61.8
Age 18-34	263	46.8	32.2	220	39.6	26.2
Age 35-54	210	37.4	50.0	191	34.4	42.0
Age 55+	89	15.8	17.8	145	26.1	31.9

*Note: One respondent was missing demographic information at the time of processing the diary study. For this reason, the sum of respondents by demographics is one less than the total by sample source.

The table above shows that females are somewhat over-represented in the tablet diary study, while those aged 18-34 are over-represented and those aged 35-54 are under-represented in both the tablet and e-reader diary samples. Nonetheless, we concluded upon examination of age and gender differences that weighting by age and gender would have a minimal effect on the data shown. We therefore proceeded with our analysis without any weighting.

Results and Observations

Tablet and E-reader Activities

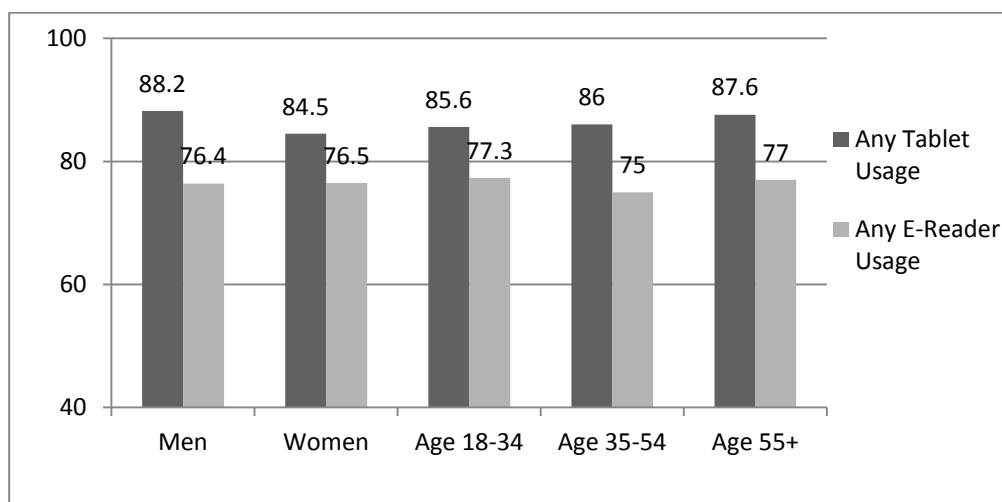
The vast majority of these devices' owners do use them in an average week, as shown in the table below. Tablets are more likely to be used than e-readers, with almost a quarter of the e-reader respondents saying they hadn't used the device at all during the course of the week-long diary study.²

Table 1
% of Respondents who Used Device, Last 7 days

Tablet Owners	E-Reader Owners
86.1%	76.4%

In general, there is little difference by sex and age with respect to overall weekly usage. Men were somewhat more likely than women to have used their tablet during the prior week. Gender does not seem to play a role, however, in overall usage of e-readers. And age appears to be negligibly related to the likelihood of usage of both devices in a given week.

Chart 1
**% of Respondents who used their Tablet or E-reader, Last 7 days,
by Age and Sex**



Perhaps not surprisingly, e-readers and tablets are used for very different purposes. Book-reading clearly dominates e-reader activity, with 63% of e-reader owners using their device to read books on an average day in the diary survey. The percentages of respondents conducting other activities on e-readers are all below 10%. Apart from book reading, the activities most likely mentioned by e-reader owners were:

- sending email (8.1%),
- reading magazines (7.6%),
- reading newspapers (7.1%),
- social networking (6.9%),
- playing a single-player game (6.9%), and
- visiting a website (5.6%).

² We cannot rule out the possibility that the percentages of non-users are inflated due to respondents' interests in shortening the interview.

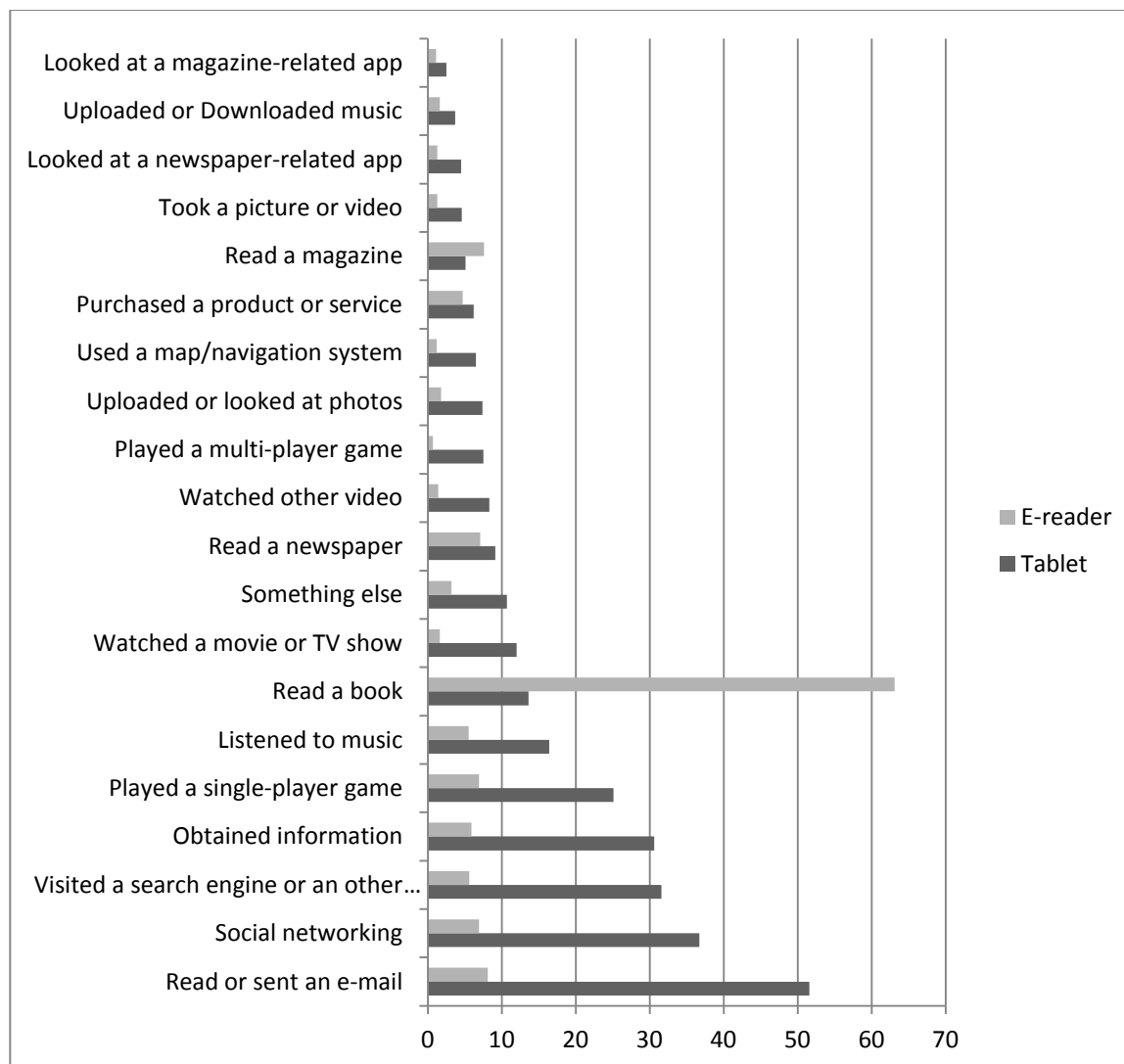
While many of the top activities for tablets mirror those for e-readers, tablet owners are much more likely to engage in these activities, indicating that tablets are generally used for a much wider variety of purposes. Top activities for tablet owners include:

- sending email (52%),
- social networking (37%),
- visiting a website (32%),
- obtaining information (31%),
- playing a single-player game (25%), and
- listening to music (16%).

The top three tablet activities are Internet-related, indicating that the tablet is being used as a replacement for a desktop or laptop. These are the sorts of activities that might be thought of as daily habits on the Internet and so appear to have become daily habits for large numbers of tablet owners. Playing games and listening to music, activities more closely associated with mobile phones, were the two most common types of apps used by tablet owners in the prior 30 days, according to the intake survey.

While tablet owners do use their device to read books, the percentage using their device for this activity on an average day is much lower than that for e-readers (14% vs. 63%). Newspaper and magazine reading, on the other hand, are about as common on tablets (9.1% for newspapers and 5.1% for magazines) as on e-readers (7.1% for newspapers and 7.6% for magazines). Watching TV or movies ranks below reading a book on tablets, but appears to be slightly more prevalent on tablets than consumption of either newspapers or magazines.

Chart 2
% of Tablet and E-Reader Owners Doing Specified Activity on an Average Day
Bases: All Tablet Owners and All E-Reader Owners



Activities on the respective devices differ by demographics. (See Tables A1 and A2 in the Appendix.) Men were more likely than women, on both e-readers and tablets, to listen to music, to read magazines and newspapers, and to use newspaper-related apps. Women were more likely than men to have read a book on a tablet. E-reader owners aged 18-34 were more likely than their elders to treat their e-reader as a multimedia device and use it for a variety of activities, such as listening to music and social networking. E-reader owners 55+ were the least likely to use e-readers for anything besides reading books and playing games. Tablet owners who were 18-34 were the most likely to have listened to music and to have watched a movie, TV show or other video on their devices. Tablet owners aged 35-54 were most likely to have read a newspaper or to have purchased a product or service on their tablet devices. Tablet owners aged 55+ were the most likely to report playing single-player games in their diary surveys. Perhaps the games they are playing are more the sort of simple, daily habitual diversions (e.g., Solitaire, Sudoku) that younger device owners are more accustomed to playing on their mobile devices. This pattern bears re-examination over time.

Patterns of Usage

In contrast to the weekday dominance reported in Google's tablet survey ("Tablets Are Changing the Way Consumers Engage with Content," posted by Harsh Shah, April 17, 2011, <http://googlemobileads.blogspot.com/2011/04/tablets-are-changing-way-consumers.html>), the percentage of tablet owners using their device dips only slightly on weekends, while e-reader usage changes little, if at all.

Table 2

% of Tablet and E-reader Owners using the Device on an Average Weekday or Average Weekend Day

Used Device	Weekday	Weekend
Tablet	87.0%	83.7%
E-reader	76.8%	75.6%

However, consistent with Google's findings, our diary survey showed that for almost all activities, tablet owners and e-reader owners are more likely to report doing a particular activity on a weekday than a weekend day. Emailing on tablets was particularly more apt to be done on weekdays than on weekends. The only activities with noticeably higher incidence levels on weekends were using a map/navigation system and taking a picture or video. E-reader owners, like tablet owners, tend to do all activities somewhat more on weekdays than weekends. Overall, however, use of these devices does not appear to be relegated to either weekdays or weekends; people tend to use them throughout the week.

Chart 3

% of Tablet Owners Doing Specified Activity on an Average Weekday and Weekend Day

Base: All Tablet Owners

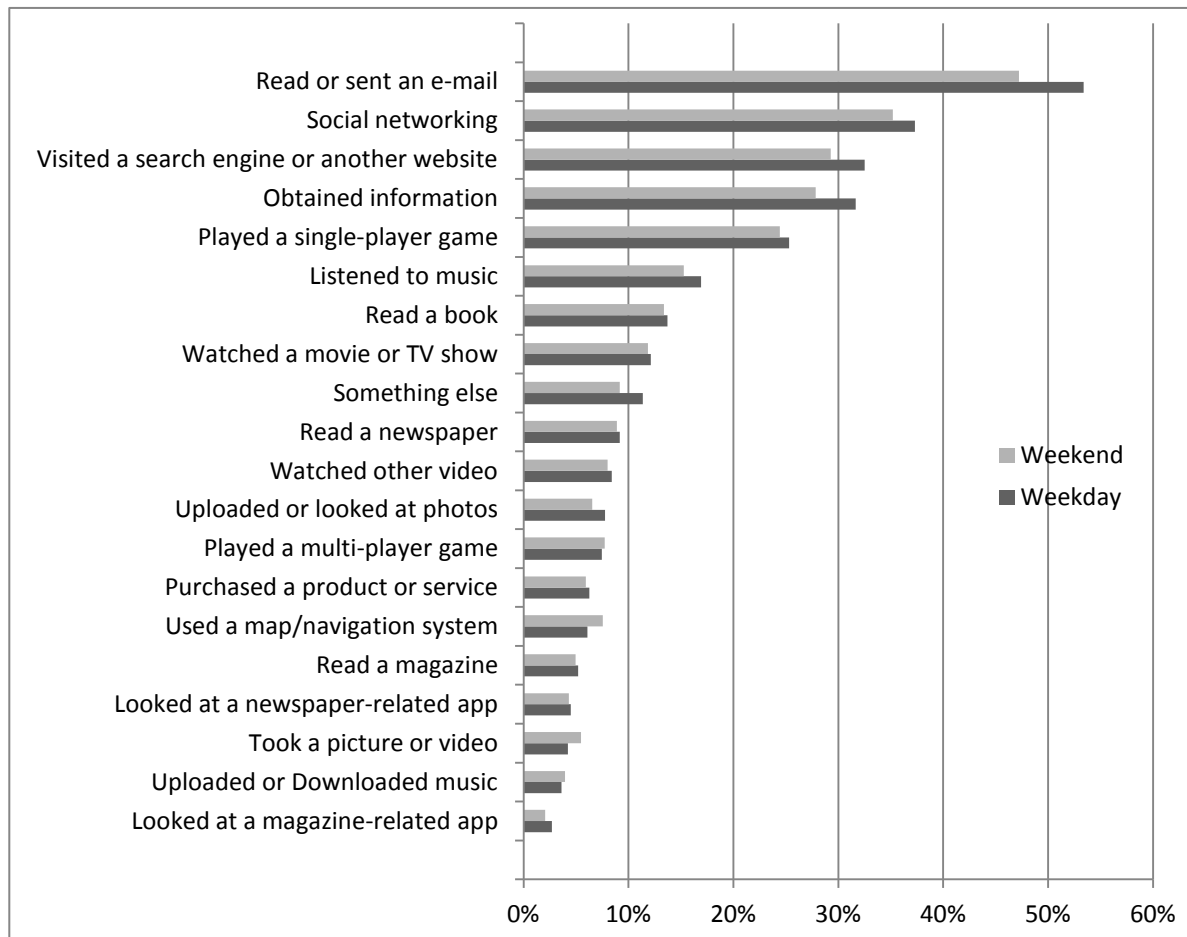
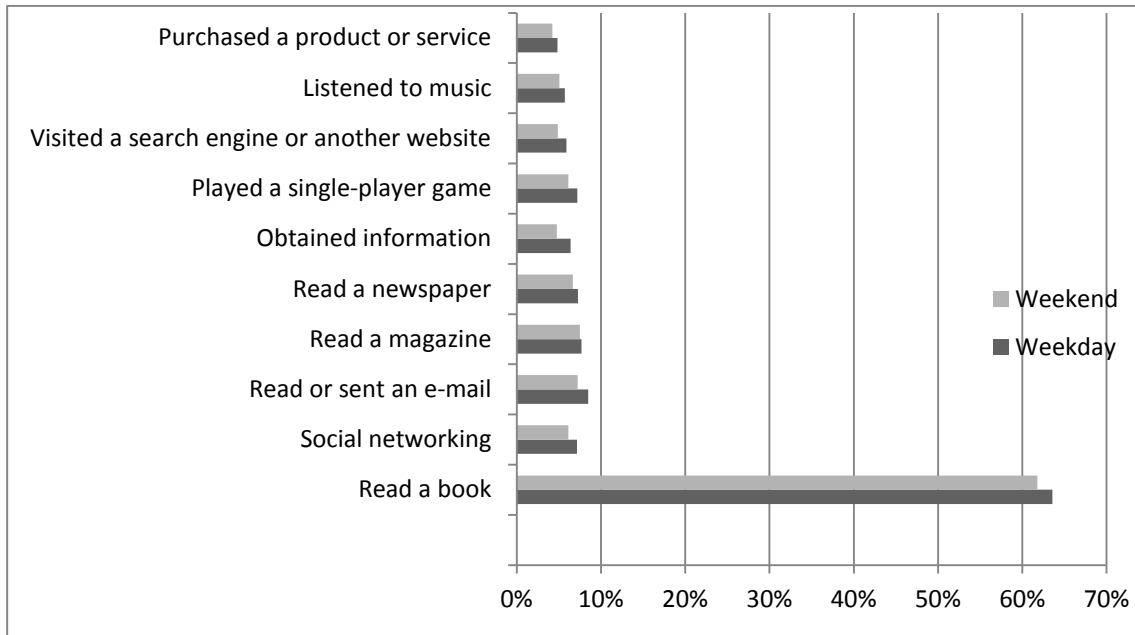
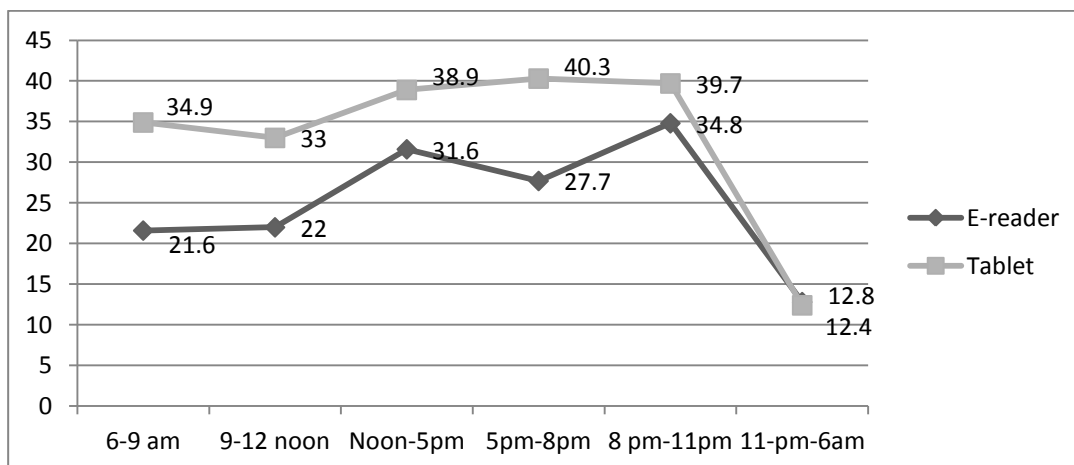


Chart 4
% of E-reader Owners Doing Specified Activity on an Average Weekday and Weekend Day
Base: All E-reader Owners



During each time period throughout the day (except late at night and in the early morning), more than 20% of e-reader owners and more than 30% of tablet owners use their devices at some point within the period. Consistent with their overall more frequent usage, tablets appear to be used more often than e-readers at all times before 11 PM and exhibit a bit more consistency in usage throughout the day. While tablet usage dips slightly between 9AM and noon, tablets otherwise seem to be used at a relatively constant rate during afternoon work hours, dinner hours, and during TV's primetime.³ There is no distinct peak time for the use of tablets. E-readers, on the other hand, do peak during the prime-time evening hours and dip during the dinner hours.

Chart 5
% of Respondents, on Average, Using Device by Daypart
Base: All Tablet and E-Reader Owners



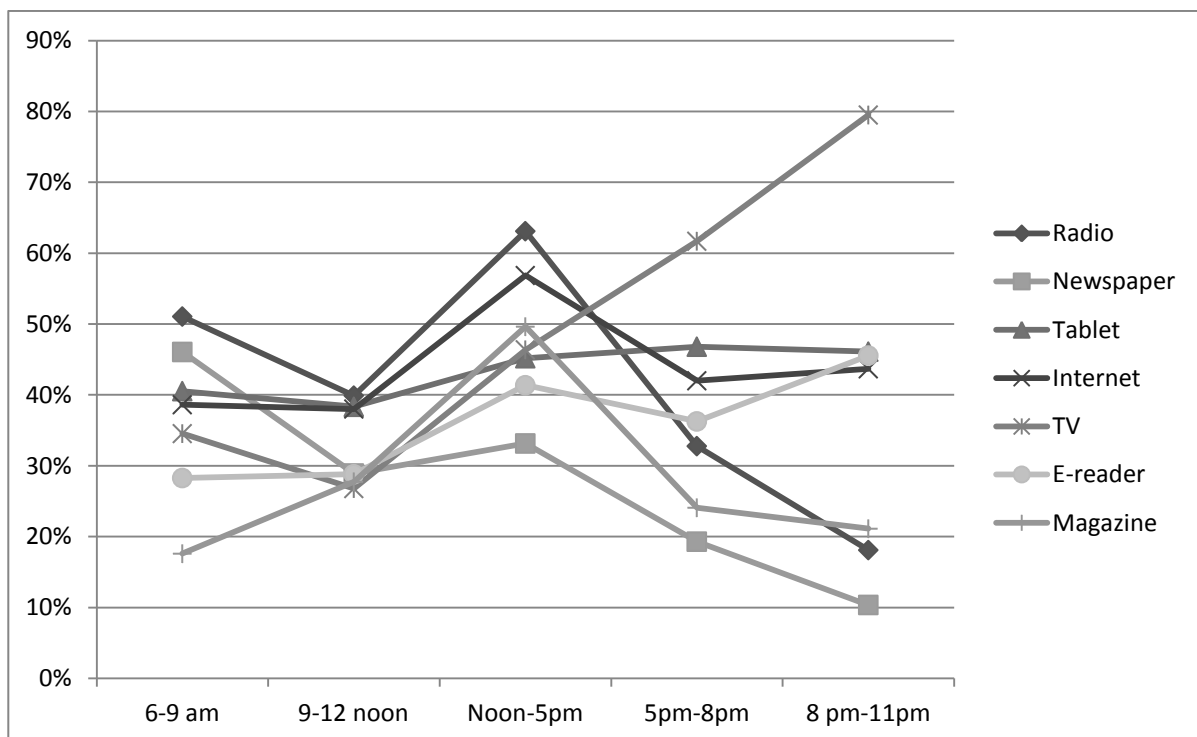
³ It should be noted that two of the six dayparts in these charts are longer than the other four. Therefore, the percentage using a device or medium in the five hours between noon and 5 PM would be expected to be higher than in the three-hour dayparts, if the hourly rates of usage were all the same.

These usage patterns do not really resemble those for any major medium. In Chart 6, the daypart data for tablets and e-readers are plotted alongside data for the five major media which were collected in GfK MRI's annual, syndicated MediaDay Study. MediaDay is a recontact telephone survey of respondents to our National Study that asks respondents about their consumption of each medium in blocks of time over the previous day. The methodology is different from that of the panel diary study reported here in mode (telephone vs. online), number of days covered (seven vs. one), and the way that duration of activity is assessed (to be discussed below), but the questioning procedures are sufficiently similar to allow for a broad comparison. In this chart, the bases for tablet and e-reader consumption are those who used tablets and e-readers, respectively, at any time during the diary study. The bases for all other media are those who used that medium at some time during the prior day. Setting the bases of the percentages to the user populations for each medium serves to make usage data more comparable across media, because the diary study was done only among owners of tablets and e-readers.

This chart indicates that:

- Tablet usage follows a distinct profile. Use of tablets is flatter through the course of an average day than usage of any major medium. Unlike radio and television, there is no clear-cut peak usage time for tablets.
- Moreover, other than television, tablets are the only platform/medium to experience an increase in usage between afternoon and early evening.
- The major medium whose usage trajectory is closest to the tablet is the Internet. Given the most popular uses of the tablet, this similarity is not surprising.
- E-readers' usage profile through the day is probably closer to that of television than of any other medium, in that, like television, usage rates tend to increase through the day. Newspaper consumption generally declines through the day, and magazine consumption climbs through mid-day and then falls. However, e-reader usage does not climb as rapidly as usage of television at any time of day.
- E-reader usage ranks second to television in the increase in the proportion of users between early evening and prime time. The Internet is the only other medium that experiences a prime time rise. Use of all other major media/platforms falls at that time.

Chart 6
Average % Using Each Medium/Platform by Daypart
Bases: User of Each Individual Medium



The smooth pattern of tablet usage across all dayparts for an average day obscures a key difference in usage of tablets between weekdays and weekends: Between 5:00 and 8:00 PM, usage actually increases on weekdays and declines on weekends. Tablet usage peaks during this dinner time period on weekdays, but peaks in the afternoon on weekends. This difference is probably due to increased socializing during the 5:00 to 8:00 time period on the weekends. For e-readers, there is a 5-8pm dip in usage on both weekdays and weekends, but it seems more pronounced on weekends. Otherwise, there is little difference between weekdays and weekends in patterns of e-reader usage through the day.

Chart 7
% of Tablet Owners, on Average, Using the Device by Daypart, Weekday vs. Weekend

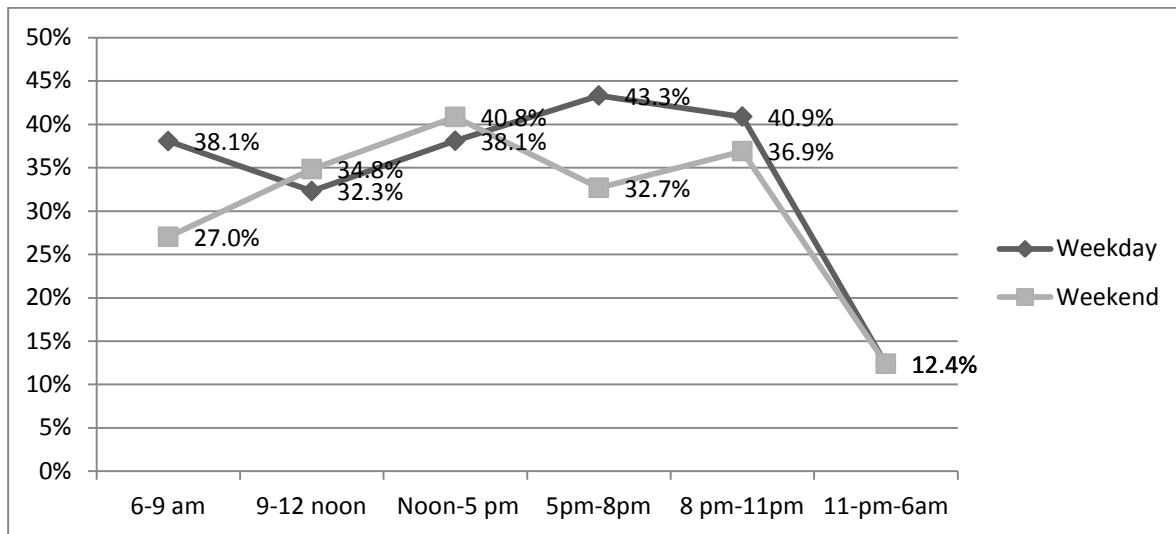
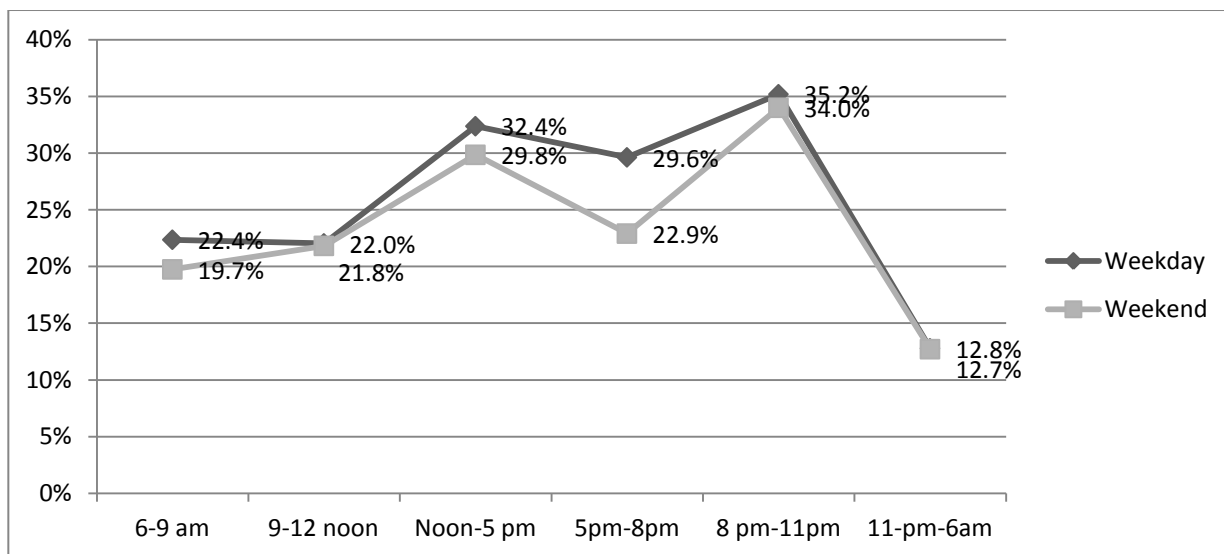


Chart 8
% of E-Reader Owners, on Average, Using the Device by Daypart, Weekday vs. Weekend



Charts A1 and A2 in the Appendix show comparisons between tablets and e-readers and the major media on weekdays and weekend days. In general, the differences observed for all seven days could be observed for weekdays and weekends separately. The pattern of tablet usage was particularly similar to that of Internet usage on weekend days.

As can be seen in Charts 9 and 10, the prevalence of tablet activities varies through the day:

- On weekdays, reading and sending email peaks in the early morning, drops after 9 AM, and then rises again through the day and after work is over, declining again in TV's primetime. On weekends, reading and sending email on tablets follows a different trajectory, peaking in the morning after 9AM, presumably because work doesn't interfere with this activity during those hours on weekends.
- Like emailing, social networking using a tablet peaks between 6 and 9 AM on weekdays and drops sharply as work begins. Unlike emailing, however, social networking peaks again in primetime. On weekends, social networking with tablets reaches its highest points in both the afternoon and in primetime.
- Aside from email, the activity with the greatest volatility through the day is playing single-player games. This activity rises consistently through the weekday until 5-8 PM and then dips, but increases sharply between noon and 5 PM on weekend days.
- Reading books on tablets rises from 9 AM till the end of the day on weekdays. Reading newspapers on tablets dips steadily through the day on both weekdays and weekends, in a pattern similar to that for printed newspapers.

Chart 9
Selected Tablet Activities
% Doing Activity on an Average Weekday, by Daypart
(Base: Total)

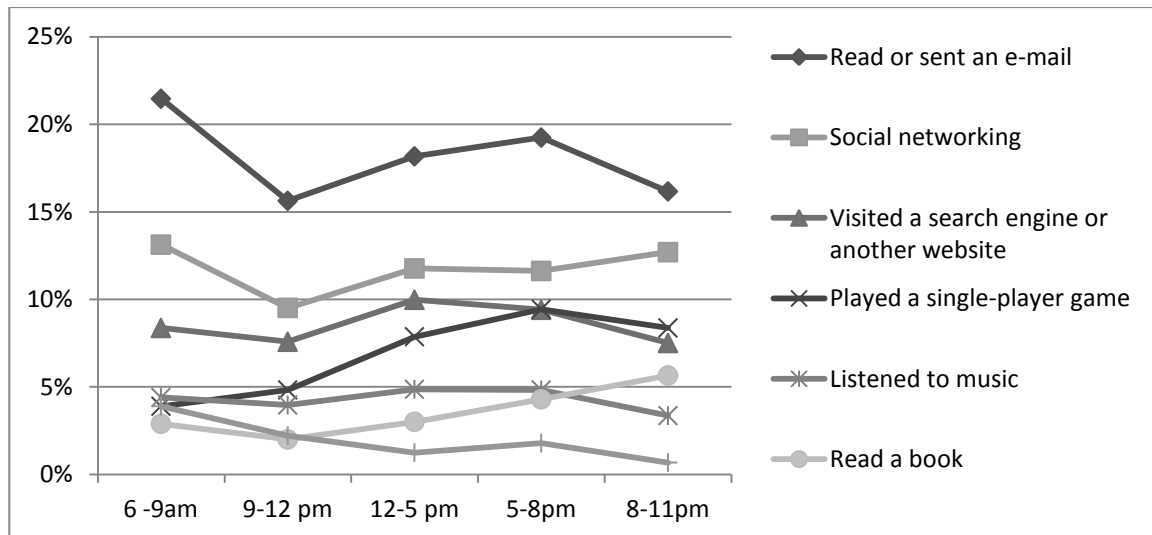
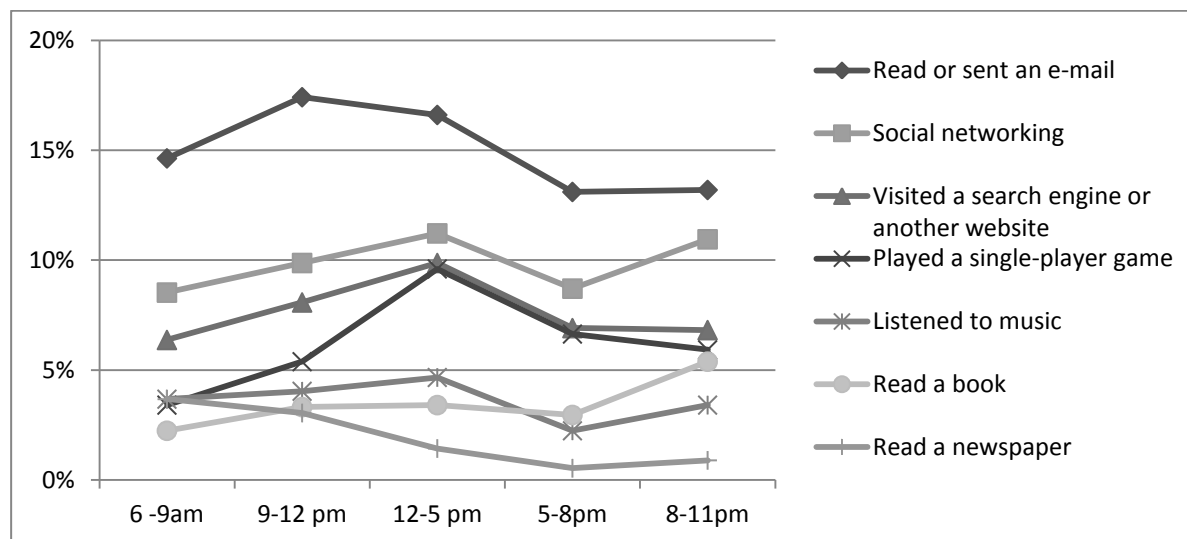


Chart 10
Selected Tablet Activities
% Doing Activity on an Average Weekend Day, by Daypart
(Base: Total)



As can be seen in Chart A3 in the Appendix, tablet usage is very similar among men and women through the course of the day, even though, as noted above, men are somewhat more likely to use their tablets overall. E-reader behavior, however, does differ through the course of the day by gender in one respect: The percentage of men using the device slowly grows throughout the day, while women's use spikes in the afternoon and then dips between 5pm and 8pm before climbing again after 8 PM.

Charts A3 and A4 in the Appendix show usage patterns through the day for e-reader and tablet owners, respectively, by age. Among e-reader owners, 18-34 year olds stand out a bit from their elders, with more consistent levels of usage throughout the day before 11 PM. Younger tablet owners also exhibited less variability over the course of a day in usage of tablets. However, younger tablet owners, in contrast to younger e-reader owners, were much less likely to quit using their tablets after 11 PM. This could be due, in part, to the multi-functionality of tablet devices, enticing younger respondents to stay up later and explore more uses for a tablet, which they might not be tempted to do with an e-reader. Tablet owners aged 35-54 are most likely to use the device early in the day and during primetime hours. Respondents aged 55+, on the other hand, are most likely to use their device between 9 AM and 5 PM since, presumably, they would be less likely to be working.

Time Spent

Tablet owners reported spending an average of about 2 ½ hours (153 minutes) with their tablets on an average day. This rough estimate is based on a question in the diary study in which respondents were asked to report their time spent for each activity within a range. Time spent was then calculated by taking the midpoint of this range. The spans covered by each range grow as the amount of time increases. For example, for activities done for less than 15 minutes, the ranges reflected spreads of 1, 3 or 5 minutes. At the high end, for two of the day parts, the amount of time between the lowest and highest points within the range was one full hour. Thus, the estimates of time reported below are necessarily inexact. If the times spent by respondents tended to hover closer to the lower ends of the ranges, then this could, in part, account for some of the seemingly high levels of reported time spent on some activities. In addition, if two activities were done simultaneously (for example, listening to music and looking at pictures), it is reasonable to assume that the respondent would credit each activity with an equal amount of time spent. It is also possible that respondents inadvertently exaggerated time spent within individual dayparts. Thus, the amounts of time spent are probably more useful for investigating relative differences in time spent, than in serving as estimates of durations for particular activities.

In spite of these limitations, the diary survey suggests that the tablet is an absorbing platform that encompasses a number of activities that consume a lot of its owners' time.

Among those who used each device during the week of the diary study, tablet owners spent more time with tablets than e-reader owners spent with e-readers. There was little difference between weekdays and weekends in the amount of time spent with the device, among those who used the device on weekdays and weekends, respectively.

Table 3

**Average Minutes Spent by Tablet and E-reader Owners
Using the Device on an Average Weekday or Average Weekend Day
Base: Used the device at least one weekday and at least one weekend day, respectively**

Used Device	Weekday	Weekend
Tablet	153.8	152.4
E-reader	124.0	127.7

The five activities on which tablet owners spent the most time, at least one hour per day on the days that they engaged in these activities, were:

- Watching a movie or TV show (an average of nearly 100 minutes on the days on which they did this; this is presumably a function of the length of the content)
- Reading a book;
- Listening to music;
- Playing a single-player game;
- Playing a multi-player game.

E-reader owners in our panel use their device for far fewer types of activities than tablet owners do. Among those who read books on their devices, e-reader owners report reading books for longer periods of time than tablet owners do (108 minutes vs. 82 minutes). For those who read magazines and newspapers on their devices, however, e-reader and tablet owners report similar amounts of time spent with these media. Additionally, at an average of almost 41 minutes per day among those who did the activity, magazine reading on tablets ranked notably higher in time-spent among tablet activities, than it did in incidence.

Chart 11

Tablet
Average amount of Time Spent per day in Minutes, per Activity
Base: Respondents who did this activity, last 7 days

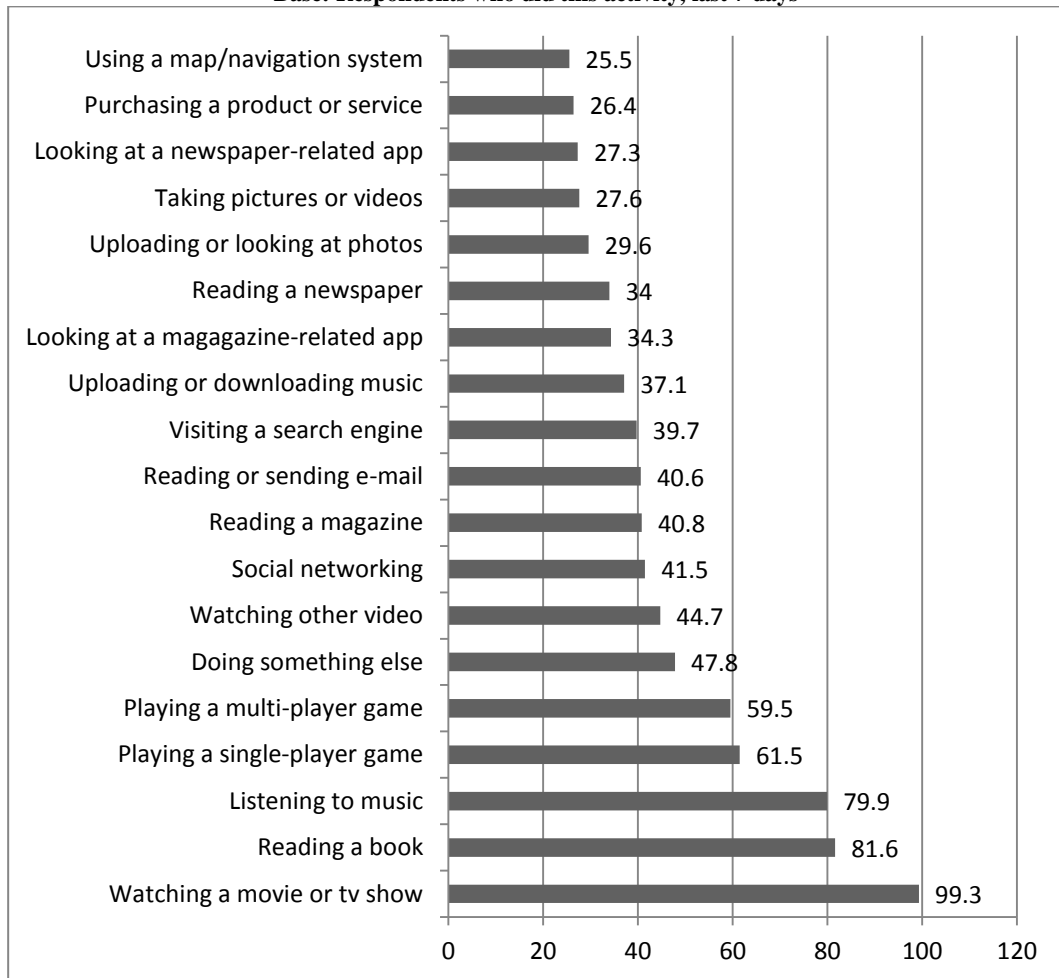
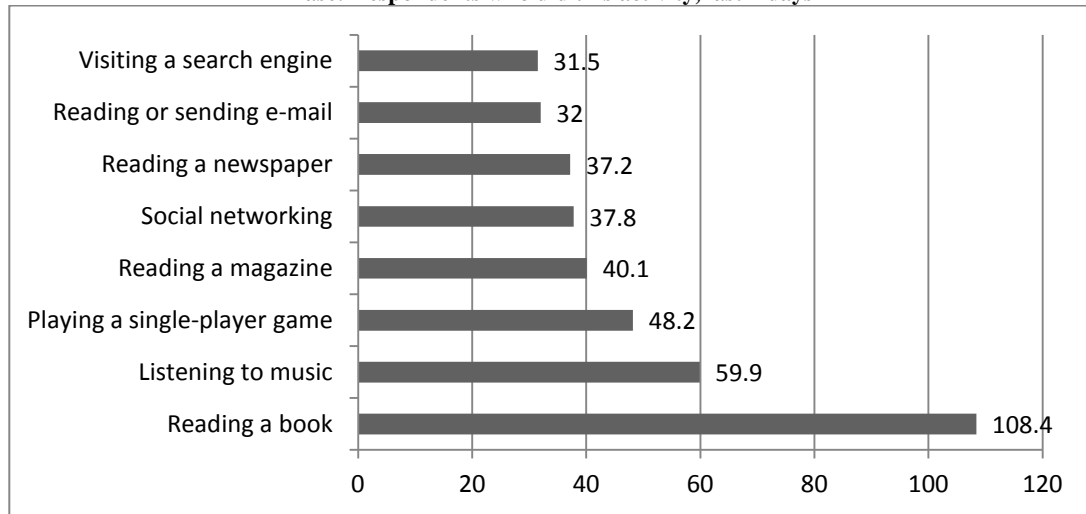


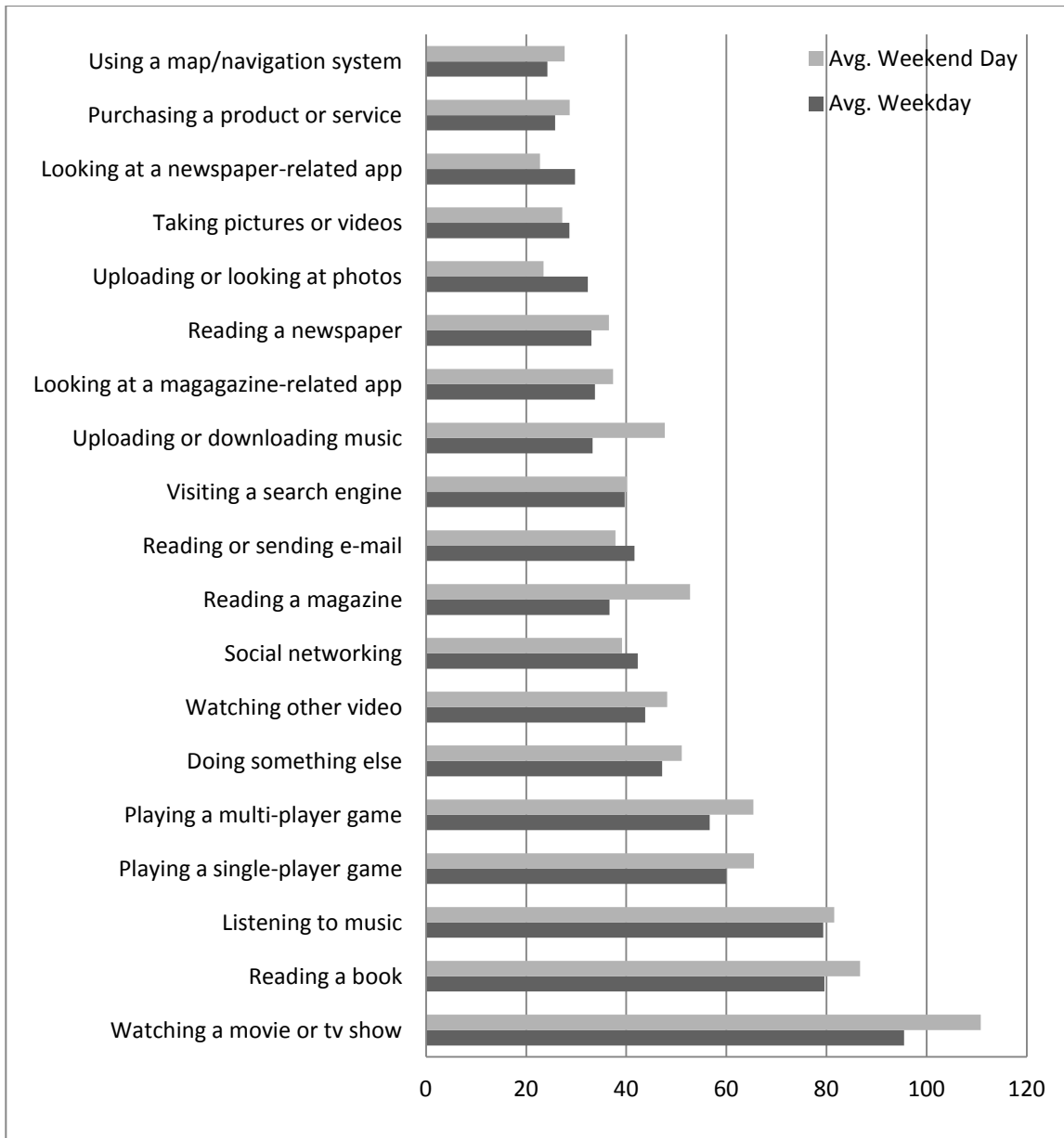
Chart 12**E-Reader****Average amount of Time Spent per Day in Minutes, per Activity****Base: Respondents who did this activity, last 7 days**

In general, tablet owners spent more of their time engaging in most tablet activities on an average weekend day than on an average weekday. This was the reverse of the pattern in overall participation in tablet activities: Most activities are done more often on weekdays than weekends. Thus, tablet owners appear to engage in fewer tablet activities on weekends, but they spend more time on those in which they do engage.

Chart 13

Tablet

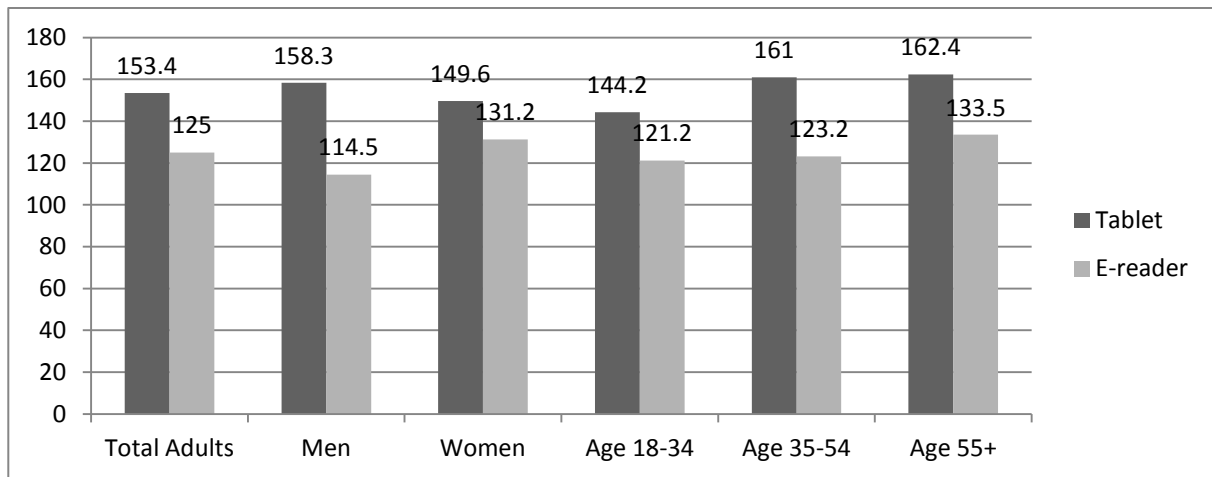
Average amount of Time Spent per Day in Minutes on an Average Weekday and Weekend Day
Base: Respondents who did this activity



As can be seen in Chart 14, below, men spent more time with tablets than women, while women spent more time with e-readers than men. E-reader owners over 55 spend more time per day with their devices than those younger than 55. Tablet owners under 35 actually spent less time with their devices than those over 35.

Chart 14

**Average amount of Time Spent in Minutes per day
By Demographic Group**
Base: Those who used tablets and e-readers at least once in the course of a week



Effect on Other Media

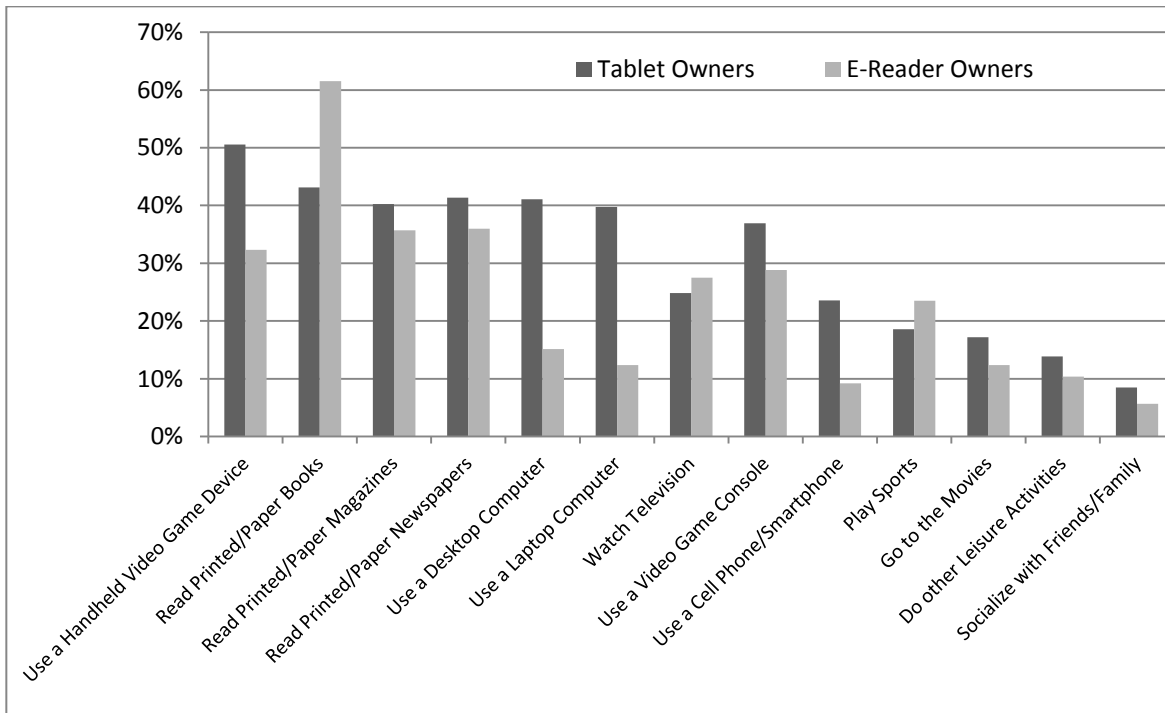
Given the amount of time that people spend with these devices, it is no surprise that tablet and e-reader owners appear to have altered their media and other behavior as a result of owning their device. According to the intake survey, and seen in Chart 15, below, the activity most affected by tablet ownership seems to be handheld video games, with 51% of those that use handhelds saying that they do less of this activity. This self-reported decline is not entirely unexpected, given that playing single-player games is one of respondents' top activities on tablets. About two-fifths of tablet owners reported less desktop and laptop computer usage (41% and 40%, respectively), perhaps a function of owners' most common uses of tablets as devices to access the Internet. Other activities affected by tablets include usage of print media, with 43% of owners saying they use books less often, 41% saying they use newspapers less often, and 40% saying they read print magazines less often. Magazine and newspaper reading are not yet as common on tablets as some Internet activities (such as social networking and search), and therefore, it seems, so far at least, that, in contrast to the Internet, tablets may be draining away more magazine and newspaper readers than they are adding. Watching television appears to be less affected by tablets, thus far, than consumption of printed media, even though tablet owners are more likely to watch video on tablets than read newspapers or magazines on them. These percentages do not vary drastically by demographics. (See Table A3 in the Appendix for more detail and demographic differences for e-readers and tablets.)

E-readers, on the other hand, seem to be less impactful on other activities, with generally smaller percentages of respondents reporting they do other activities less often as a result of using an e-reader, than as a result of using a tablet. The one obvious exception is print/paper book reading, with 62% of e-reader owners reporting less reading of printed books. The only other activities reported by more than a third of e-reader owners were reading printed newspapers and printed magazines (36% for each).

Sports, movies and socializing, on the other hand -- all activities not typically tied to technology -- do not seem to be affected much by either tablets or e-readers.

Chart 15

% of Tablet and E-Reader owners who said they do these activities “less often” as a result of owning their device

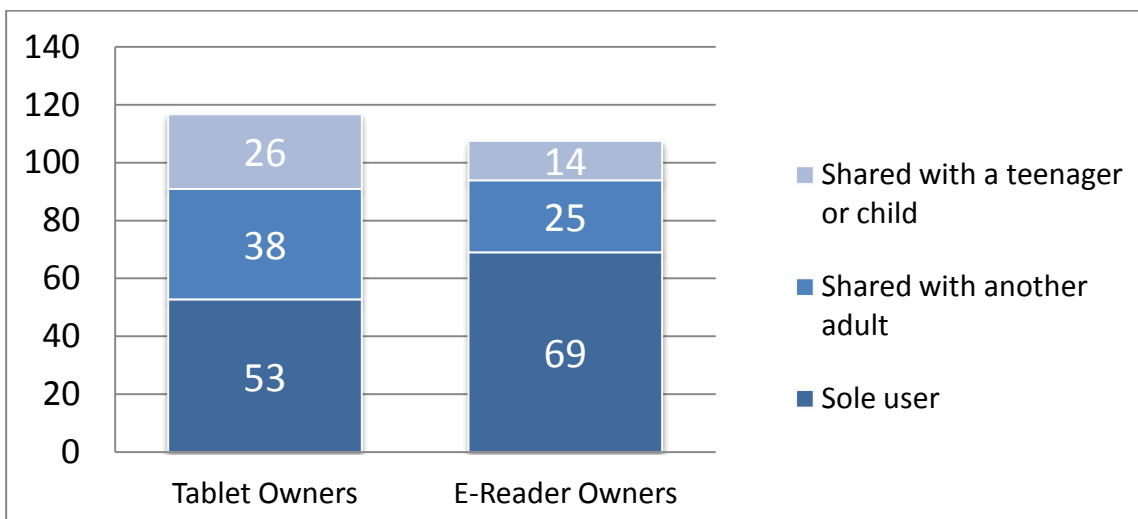


Individual vs. Household

When tablets and e-readers first arrived on the market, it was assumed that they were personal devices, like mobile phones, that were not shared among family members. Data from the intake survey indicate that this is not necessarily the case. Nearly one third of e-readers said that they shared their e-reader with somebody else, and nearly half (47%) of tablet owners reported that they were not the sole users of their devices. This widespread sharing indicates that metrics from electronic tracking of app usage, such as number of downloads or number of times that an app is opened, probably understate the audiences for newspaper and magazine apps. Pass-along has come to the world of tablet editions, and data on tablet edition exposure needs to take the pass-along audience into account. Readers per copy of tablet versions of newspapers and magazines are probably greater than 1.0.

Chart 16

% of Tablet and E-Reader owners who share their device with others



Conclusions

It seems that tablets and e-readers do not really resemble “traditional media,” including the Internet, in the ways or the times they are used:

- Tablet owners’ primary activities with tablets are those they would have previously conducted on computers, followed by those they might have done on their mobile phones. Watching video on tablets is not too common yet, though those who do it spend a lot of time on it. Magazines and newspapers are among the lesser-used tablet applications, though printed newspaper and magazine reading are among the activities that respondents are most likely to have given up as a result of having a tablet.
- Though e-readers are used primarily for reading books, they are about as likely to be used for reading magazines and newspapers as tablets.
- Tablets are used for more activities on weekdays than weekends, but owners spend more time on their chosen tablet activities on weekends than weekdays.
- Usage of tablets and e-readers through the course of a day does not fit the pattern of any major medium; usage of tablets varies less from daypart to daypart than use of major media; e-reader use generally increases slowly through the day.
- Men use tablets more often, while women spend more time with e-readers.
- Age differences in overall tablet and e-reader usage are minimal; older tablet owners actually spend more time with tablets, but younger tablet owners are more likely to use them late at night. Younger e-reader owners spend less time on their devices than older users. Activities on tablets do vary by age and gender.
- E-readers, and to a much greater extent, tablets, are not as personal devices as are mobile phones, and respondents report sharing them in sufficient numbers that metrics may undercount total audiences if sharing is not taken into account in the future.

As publishers offer more titles on tablets and e-readers and as the B&N Nook, with a growing selection of electronic magazines and an actively promoted newsstand, gains market share, we expect the relatively low rates of daily usage for reading electronic newspapers and magazines to increase. Anticipated developments that could further increase consumption of digital print on tablets and e-readers are the planned launch of an Apple iTunes dedicated newsstand, the rumored introduction of a color Amazon Kindle, and the rapid growth of e-reader and tablet ownership. And as this consumption grows, it is likely that the prevalence of and amount of time spent on each of the activities we inquired about here and the times at which those activities take place, will change. This study, then, is merely a baseline against which future studies of these devices will be compared.

APPENDIX

Table A1
% of E-reader owners who did specified activity on their device on an average day, last 7 days

Activities	M	F	18-34	35-54	55+	TOTAL
Read a book	60.5	64.5	57.6	63.1	71.3	63.1
Read or sent an e-mail	9.1	7.6	13.0	6.2	3.3	8.1
Read a magazine	10.1	6.2	11.8	6.8	2.4	7.6
Read a newspaper	10.3	5.3	9.8	6.6	3.6	7.1
Played a single-player game	6.4	7.2	6.1	6.3	8.9	6.9
Social networking	7.3	6.6	12.2	5.0	1.2	6.9
Visited a search engine or another website	5.1	5.9	7.4	5.2	3.4	5.6
Listened to music	6.7	4.9	9.1	4.1	2.1	5.5
Purchased a product or service	3.1	5.6	4.2	4.6	5.5	4.7
Something else	1.9	4.0	2.6	3.2	4.3	3.2

Table A2
% of Tablet Owners who did specified activity on their device, last 7 days

Activities	M	F	18-34	35-54	55+	TOTAL
Read or sent an e-mail	51.0	52.1	45.9	55.1	60.4	51.6
Social networking	35.3	37.7	39.0	38.5	25.8	36.7
Visited a search engine or another website	30.8	32.1	30.0	34.3	29.8	31.6
Obtained information	33.8	28.2	27.5	34.0	31.7	30.6
Played a single-player game	24.4	25.5	23.1	24.3	32.7	25.1
Listened to music	20.2	13.7	21.9	12.7	9.0	16.4
Read a book	12.0	14.8	13.3	13.7	14.5	13.6
Watched a movie or TV show	14.0	10.6	15.2	9.7	8.4	12.0
Something else	10.9	10.6	7.4	12.4	16.7	10.7
Read a newspaper	11.2	7.5	7.9	10.6	8.9	9.1
Watched other video	11.8	5.8	9.7	7.8	5.3	8.3
Played a multi-player game	9.2	6.3	7.6	6.9	8.7	7.5
Uploaded or looked at photos	8.3	6.8	7.9	6.1	9.0	7.4
Used a map/navigation system	8.1	5.3	6.4	6.2	7.2	6.5
Purchased a product or service	6.1	6.2	5.5	7.3	5.3	6.2
Read a magazine	6.5	4.1	5.7	4.9	3.9	5.1
Took a picture or video	5.3	4.0	6.1	4.0	1.6	4.6
Looked at a newspaper-related app	5.8	3.5	3.3	4.6	7.4	4.5
Uploaded or Downloaded music	4.6	3.1	5.4	2.8	0.8	3.7
Looked at a magazine-related app	2.8	2.3	2.5	2.6	2.3	2.5

Chart A1

Average % Using Each Medium/Platform by Daypart on Weekdays
Base: Users of Each Individual Medium

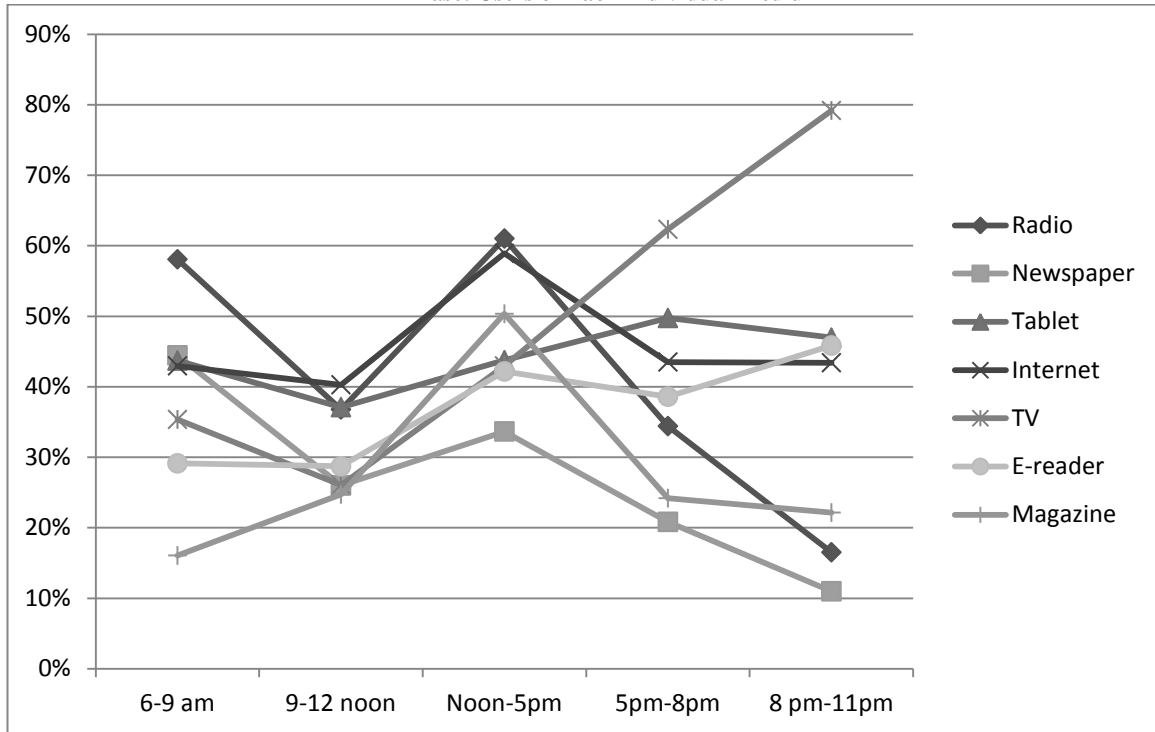


Chart A2

Average % Using Each Medium/Platform by Daypart on Weekends
Base: Users of Each Individual Medium

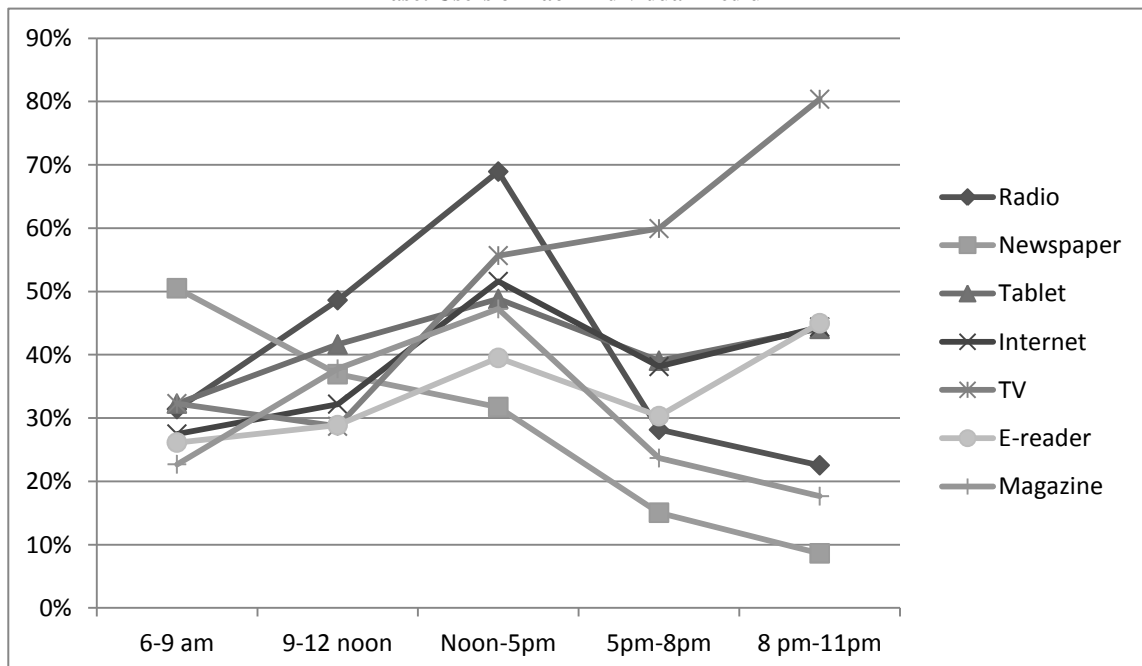


Chart A3
% of Respondents, on Average, Using Device by Daypart, by Sex

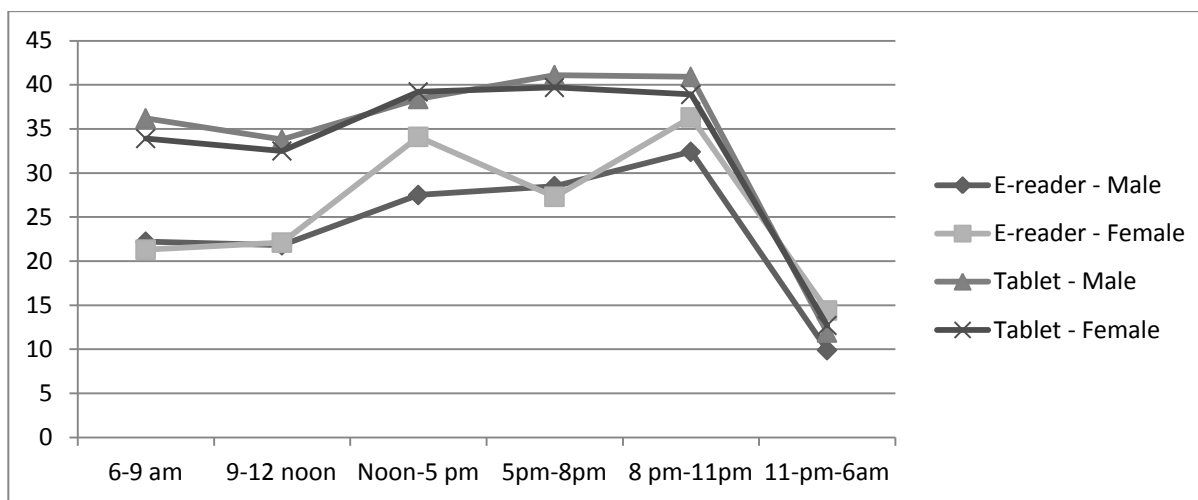


Chart A4
% of E-Reader Owners, on Average, Using Device by Daypart, by Age

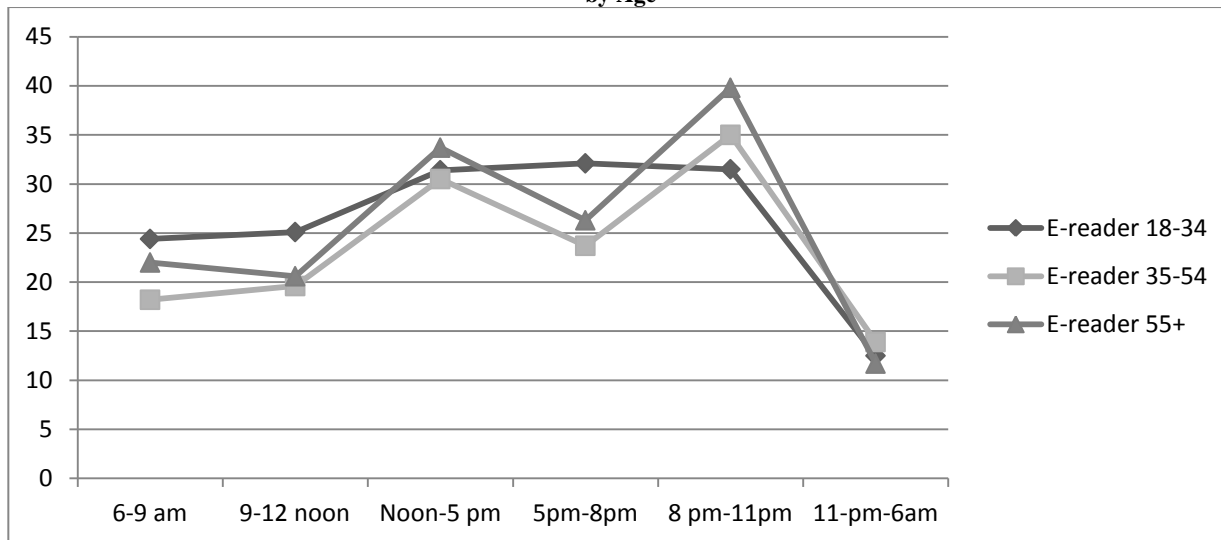


Chart A5
% of Tablet Owners, on Average, Using Device by Daypart, by Age

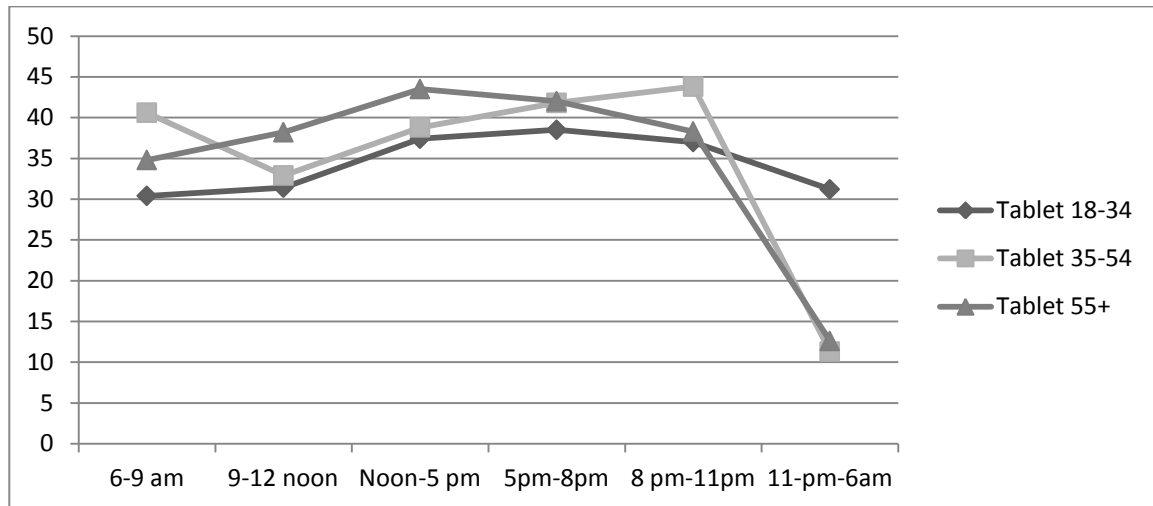


Table A3
Activities done Less Often as a result of owning a Tablet
(Among those who do the Activity)

	Total	Age 18-34	Age 45-54	Age 55+	Male	Female
Use a Handheld Video Game Device	50.6%	49.3%	51.6%	56.0%	44.9%	55.0%
Read Printed/Paper Books	43.1%	42.9%	46.1%	38.3%	44.2%	42.4%
Read Printed/Paper Newspapers	41.3%	43.5%	44.0%	28.7%	42.3%	40.6%
Use a Desktop Computer	41.1%	41.6%	42.3%	36.6%	36.5%	44.5%
Read Printed/Paper Magazines	40.3%	42.2%	42.4%	28.7%	42.2%	38.9%
Use a Laptop Computer	39.8%	36.8%	42.8%	44.2%	38.2%	40.8%
Use a Video Game Console	36.9%	34.1%	39.4%	49.6%	31.2%	41.5%
Watch Television	24.9%	25.8%	25.2%	20.7%	25.3%	24.5%
Use a Cell Phone/Smartphone	23.6%	22.8%	25.6%	21.4%	23.4%	23.7%
Play Sports	18.6%	19.5%	16.2%	20.4%	16.0%	20.9%
Go to the Movies	17.2%	16.5%	17.8%	19.2%	16.3%	17.9%
Do other Leisure Activities	13.9%	15.7%	11.8%	11.8%	14.0%	13.8%
Socialize with Friends/Family	8.5%	9.9%	7.6%	5.7%	9.9%	7.6%

Activities done Less Often as a result of owning an E-Reader
(Among those who do the Activity)

	Total	Age 18-34	Age 45-54	Age 55+	Male	Female
Read Printed/Paper Books	61.6%	59.3%	65.7%	60.6%	63.4%	56.8%
Read Printed/Paper Magazines	35.7%	42.6%	36.6%	22.4%	30.6%	34.2%
Read Printed/Paper Newspapers	36.0%	44.4%	36.6%	21.1%	29.7%	34.3%
Watch Television	27.5%	29.3%	29.0%	22.8%	26.1%	24.0%
Use a Video Game Console	28.8%	29.5%	25.1%	34.8%	27.9%	23.5%
Use a Handheld Video Game Device	32.3%	33.1%	29.4%	35.7%	31.1%	26.7%
Play Sports	23.5%	20.0%	23.0%	33.9%	26.9%	22.8%
Use a Desktop Computer	15.1%	22.1%	12.5%	6.8%	10.0%	13.6%
Go to the Movies	12.4%	13.0%	11.1%	12.7%	11.8%	11.1%
Use a Laptop Computer	12.4%	14.0%	10.9%	10.8%	11.0%	14.4%
Do other Leisure Activities	10.4%	12.0%	9.0%	8.9%	9.1%	11.5%
Use a Cell Phone/Smartphone	9.2%	10.7%	10.1%	5.0%	8.0%	10.2%
Socialize with Friends/Family	5.7%	7.7%	5.3%	2.4%	4.1%	7.1%