PRESSEDGE 2.0 – MEASURING THE USAGE OF EDITORIAL CONTENT ACROSS PRINT AND ONLINE MEDIA PLATFORMS

Karin Immenroth, MEC GmbH Jennifer Waldeck, Czaia Marktforschung GmbH

1.0 Situation Overview

PressEdge is an instrument of revised media planning and was first carried out in 2001/2002 as a longitudinal study on the usage of editorial content in print publications. Since then, Czaia Marktforschung and MEC have conducted a follow-up wave every year, so that the current study, which is going to be released at the end of 2013, is already wave 11. This present article deals with wave 10, released in winter 2012/2013, which is the first one of PressEdge 2.0. It is an advancement of PressEdge and includes online as well as print publications.

Whereas media planning instruments are refined continually, global performance values are supplemented and partially substituted by more detailed values. This in-depth information about readership and audience regarding attitudes, preferences, socio-demographics and consumption characteristics, put media planners in the position to better form and understand target groups and place ads. An important point in that case is to rate special interests of members of target groups in reference to their preferred editorial content.

When starting PressEdge, the main objective was to provide information on editorial content to media planners. The general approach of them was not referring the planning process to empirical data but more or less to use suppositions about editorial use in print media. For example, advertisements for cooking products were frequently placed exclusively in the recipe rubric of magazines, whereas car advertisements were often made in technical rubrics. Supplements dealing with special interest topics were another example of this approach.

Choosing editorial environments similar to the advertised products or services can occasionally reinforce communication success – but not reliably. You need to factor the possibility of missing interest in the respective editorial section into advertising decisions. Due to this fact, there is always a risk of a very low reachability of ads. And the approach would be counterproductive. Ten years later, this has not changed a lot and it is still our objective to enable a more target-oriented advertisement – with empirical and detailed information about preferences and interests. And as we started PressEdge over ten years ago, time series analysis is possible, too.

In this case it is not only the affinity of target groups for magazines and newspapers that is inevitable for planning and needs to be measured, but affinity for editorial contents. It is the information about above-average or below-average opportunities of attracting attention that offer more value to media planners for successful advertisement with a high advertising effect.

For many years, the editorial content of print publications has been measured using PressEdge, but the enormous increase of cross-media usage has made the integration of online publication necessary for media planning. With Press Edge 2.0 it is possible to optimize targeting efforts in cross-media campaigns based on data that has been collected in the described above way. The inclusion of online media presents the urgently required step towards measuring the media usage across different platforms and better understanding the synergies between print and online media. This is all the more important as those two media platforms are highly related and share a number of qualities. To be successful in cross-media advertisement, it is indispensible to form the "right" target groups and get to know their main concerns when consuming media. The difficulty about that is plain: Readers with a strong interest in politics and economy in a print publication aren't necessarily into the same topics when visiting the particular online platform but into e.g. technology or automotive.

As people increasingly use media in an integrated manner, PressEdge 2.0 opens up new possibilities to understand how different media platforms are used in the vast array of platforms. Hence media planners are enabled to plan their campaigns more efficiently. Even if this paper picks out the PressEdge 2.0 release as a central theme and the correlation between print and online media plays a key role, it is important to state that all PressEdge functions of older waves are still implied. Therefore these functions will be outlined as well as the alterations to be sure to draw a comprehensive picture of PressEdge 2.0.

2.0 Methodology

Collectively PressEdge currently has a database of approximately 104.000 interviews to analyse. In itself, every wave consists of approximately 9.000 interviews. This paper concentrates on wave 10 with 8768 interviews. But it is furthermore possible to use data from all years to analyse time series and conduct deeper analysis of the data, i.e. for a special publication or target group.

Key facts of methodology

Number of waves: 11 in total, this paper concentrates on wave 10

Target Group: According to the questionnaire readers of at least one issue of one of the selected

titles, aged 14 to 64 (since wave 11: 14 to 90), living in private households

Method: Computer Assisted Telephone Interview (CATI)

Number of Interviews: 104.037 in total, 8768 in wave 10

Number of selected titles: 60 publications: 5 daily newspapers, 20 weeklies, 4 weekly newspapers, 10 fortnightly

titles and 21 monthly titles

Number of interviews per title: 150

400 for new titles

Number of selected websites:76

Duration of field survey: Six months

Duration of interviews: Approx. 25 to 30 minutes

Research objectives: Optimize ads placement by measuring the usage of editorial content across print and

online media platforms

The next section outlines some parts of the methodology in detail to better understand the characteristics of PressEdge 2.0.

Sample

A representative random digit sample of the population serves as a basis. This sample consists of published and non published private phone numbers. Telephone numbers are drawn from a sampling frame provided by ADM ("Arbeitskreis Deutscher Markt- und Sozialforschungsinstitute": it is a business association representing the interests of private-sector market and social research agencies in Germany) – the "ADM master sample". It is based on the range of numbers available in the German telephone network as updated, monitored and published by the governmental agency for the German telephone network. This range of numbers covers all possible telephone numbers in Germany, whether actually in use or not.

This basis is supplemented by additional data of persons who are easier to reach. In previous studies they assented to participate in a survey again and already told us which titles they read on a regular basis. This increases the reachability of readers of titles with limited circulation or lower coverage. Besides this, sample design can benefit from a special German situation of the assignment of telephone numbers in residential neighbourhoods – the socio-economic status of their residents as well as their telephone numbers are very similar. The numbers only differ in the last three digits, whereas the first two or three digits stay the same in many urban and suburban areas. This method is used assuming that similar titles were read in neighbourhoods with similar socio-economic status.

Questionnaire

Every wave there might be some changes in the universe of the survey, resp. the titles change. Wave 10 contained 60 titles of different categories like Fashion, men's magazines, women's magazines, cars, sports, economy, TV program, politics, news and national daily press. That is to say that the questionnaire contained of 5 daily newspapers, 4 weekly newspapers, 20 weeklies, 10 fortnightly titles and 21 monthly titles – each of them with the last three issues. As the field work takes up to six months, the questionnaire needed to be updated every day to include the last three issues at every point in time. Table 1 illustrates the names of all titles as well as their category and the number of interviews of wave 10 and in total.

The centrepiece of the survey – data about the usage of editorial content of selected print media – was collected by conducting interviews on respectively one issue of a title that had already been read but has still been available in the polled household. If there were multiple issues available, the survey system chose one at random, although titles with lower reach were preferred. Title selection during field survey was dynamically controlled by means of the sample management system, according to number of completed interviews ("copy tests") to each title and in total.

To conduct these copy tests, pictures of all pages with editorial content needed to be available in the system. By that, the interviewers could see the page issue on their screen whereas the interviewee could meanwhile browse the selected issue. That is 162.131 editorial pages fur further analysis of wave 10 and in total 1.586.301. Every article as well as the announcements and the follow-ups of articles were coded for all issues. If there were multiple articles on one page, they were polled separately.

For all editorial content total attention, partial use and attention to specific details were measured:

- Recognition: Headline, content abstraction, picture(s) and/ or graphics, picture descriptions, sub titles, sub heads
- Read text: Everything, almost everything, about a half, less than a half, the text was not read, no details have been noticed at all

Due to a quick generation of hundreds of details, every interview only contained part of the articles, and never more than 400 details in total.

Table 1: PressEdge titles 2012, wave 10

Fortnightly titles			Weeklies			
	Number of in	nterviews		Number of interviews		
	Wave 2012	total		Wave 2012	total	
Auto Motor Sport	150	1.822	OK!	360	360	
TV 14	144	2.014	Gala	150	1.795	
Für Sie	147	1.854	Grazia	150	507	
Freundin	150	1.898	IN	146	466	
TV Direkt	150	1.842	Sport Bild	150	1.811	
TV Spielfilm	150	1.915	Wirtschaftswoche	152	1.935	
Brigitte	145	1.933	Super Illu	150	1.816	
TV Digital	148	1.301	Auto Bild	150	1.836	
TV Movie	151	1.931	Bella	150	1.673	
Computer Bild	151	1.941	Bild der Frau	150	1.945	
-			Focus	150	2.008	
Monthly titles			Focus Money	130	1.446	
·	Number of in	nterviews	Laura	149	1.766	
	Wave 2012	total	Lisa	148	1.812	
Capital	120	1.671	Tina	141	1.892	
Cicero	119	458	Kicker	151	1.802	
Elle	150	1.775	Bunte	152	1.949	
Myself	146	409	Der Spiegel	152	2.010	
Neon	148	624	Hörzu	151	1.969	
GQ	101	1.362	Stern	152	1.961	
Impulse	79	1.400				
Madame	88	1.413	Weekly newspapers			
Manager Magazin	111	1.610		Number of i	nterviews	
Maxi	150	1.419		Wave 2012	total	
Vogue	130	1.621	Frankfurter Allg. am Sonntag	150	1.403	
Eltern	142	1.859	Welt am Sonntag	134	1.309	
Familie & Co.	150	1.780	Die Zeit	152	1.468	
Glamour	152	1.505	Bild am Sonntag	152	1.515	
Joy	150	1.776				
Petra	148	1.727	Daily newspapers			
Playboy	130	1.729		Number of i	nterviews	
Fit for Fun	149	1.760		Wave 2012	total	
Men's Health	148	1.783	Financial Times Deutschland	128	1.269	
In Style	153	1.781	Frankfurter Allgemeine Zeitung	152	1.504	
Cosmopolitan	155	1.846	Handelsblatt	152	1.730	
			Süddeutsche Zeitung	155	1.572	
			Die Welt	102	1.251	

The questionnaire was supplemented, in addition to demographics, by questions about media usage in general. This included internet usage and the ownership of computers, smartphones and tablets. The inclusion of these questions into the survey on the one hand enables further analysis about the usage of innovative products in the context of media usage and on the other hand these questions are the base of PressEdge 2.0:

Additionally to the titles of table 1, websites and apps were surveyed. As the interrogation of over 70 websites and apps would be too time-consuming for the interviewees, we have formed 15 publication groups which are topically oriented to the selected print titles. An interview about the print edition of "Der Spiegel" accordingly includes questions to the websites of group J

(table 2). Additionally there are to single titles which were not allocated to a publication group and one group with further online platforms which is polled in every interview. Each of these groups consists of two to eight titles. By that, it is not only possible to poll print media usage but also the usage of associated media platforms. This way, however, enables analysis about cross-media usage of titles by the polled readers.

Table 2: Publication groups

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Websites and apps were polled in a different way. As a lot of people use media apps (i.e. news apps) for quick undirected information seeking, we didn't ask for preferred or recently read rubrics or topics. Assuming more extensive content use on websites, it was necessary to poll preferred rubrics. And this in fact is the core of PressEdge 2.0. By this we can find out, what kind of editorial content persons of a specific target group prefer on websites in contrast to preferences in print media usage. But to determine commonalities and differences of media platforms precisely an intermediate step is required. This step is illustrated in the next section.

Rubric treatment

The results of response measurement for issues of the selected titles do not automatically give insights in generalized patterns of editorial usage of the print media. But to link print and online media usage this is at all costs. The intermediate step thereafter helps to assign the interview data, which is collected very detailed by polling the interest in editorial content for each issue, into more comprehensive information. For this purpose we evaluate the rubrics similar to the tables of content. By this, PressEdge 2.0 gives aggregated information about the differing popularity of editorial rubrics of print media for a chosen target group — which can be analysed in correlation to the usage of different rubrics on websites (inside of the formed publication groups). This evaluation, however, is on rubric level but not on content level — as this is attended by a confusing number of categories. With this approach the media planner can easily place ads with a high possibility of being seen by his target group. But this, however, is still title respectively publication group dependent.

Content Analysis

On another level of this analysis the editorial contents were evaluated independent from the publications and publication groups. A comprehensive categorization for all titles forms the basis for further steps. In total we have approx. 450 different categories. According to this categorization, we built main and sub themes to enable cross evaluations on relevant combinations of editorial content. As a result, broadly interests of the target groups' members can be deviated and be used for a comprehensive media planning.

3.0 Evaluation - How to spot cross-media usage of print and online

The main objective of PressEdge 2.0 is to optimize the positioning of advertisements by measuring the usage of editorial content across print and online media platforms. In contrast to previous waves of PressEdge, wave 10 does not only include print media but print and online media. For the purpose of further evaluation, the data needs to be integrated into a media planning software. This software provides e.g. an unlimited number of target groups, media selection and tabulation functions and the ability to display all polled test pages as jpg-files with detailed information and, eventually, cross-media information concerning print and online for analysis. This approach is based on multiple data bases – copy test generated information, interview data, content analysis data and the classification of editorial content.

The next section explains how this analysis is to be made in detail and which added value is generated for the media planner. As PressEdge 2.0 is based on the assumption that selected contents resp. rubrics are read by a statistical recorded part of the readership of a title or a publication group, we concentrate on readers with "qualified attention" (QA) in contrast to "total attention" (TA) as this makes sure, the readers have at any rate reads the selected rubric. Qualified attention in this case means, a reader has read almost everything of the referred article (rubric) and/ or all of the details have been noticed. Total attention, however, states that at least one detail has been noticed.

Case example – Improvement of a media plan

To better understand PressEdge 2.0, you find an anonymized case example of a media campaign in this section. It will show the great improvement of ads placement against the background of cross-media usage by readers. For this purpose, we chose a media campaign by a German direct bank that mostly meets the interests of price-conscious high-income earner, booked in several German publications.

Table 3 explains in detail, how this media plan is designed and how it is modified by using PressEdge. To eventually optimize ads placement in online media and create campaigns that combine print and online, further analysis and an extended media plan is required. This main part of PressEdge 2.0 is illustrated on the next pages.

$Step\ 1-Optimization\ with\ PressEdge$

Ads were places in editorial sections which provide – based on PressEdge evaluations – higher coverage and attraction by a chosen target group. In table 3 you find an excerpt of the media plan for further explanation. This plan is based on the chosen target group, which consists of people aged 18 to 59. This yields 7.611 unweighted and 7.562 interviews. As you can see, six print titles were chosen for this case example as an excerpt of the campaign.

To improve the ads placement, however, it is important choose booking which promise the highest possible attention by the reader. This (in PressEdge identified) attention is disclosed in the value for "qualified attention" (QA) as described above.

Table 3 in focus:

Plan: illustrates the number of bookings

Advertising Medium: illustrates chosen issues and titles as well as the mean for TA and QA for each title Noting scores: illustrates the improvements with PressEdge – chosen resorts and their QA and TA

Advertisement details: illustrates the chosen pages for campaign bookings

As you see in table 3 and QA Ø describes the mean for every title when counting all pages, whereas QA % describes the noting scores for a selected resort. As the objective of a media campaign is to reach the highest possible attention, it is important to know, which pages/ resorts of a title are read most frequently by readers. For example: The average QA for "Brigitte" is 46.3, so if a media planner places an advertisement in this title, the average qualified attention would be **46.3** percent. But as PressEdge tells us, an ads placement in the rubric "Check-In" provides a QA of **51.6** percent – that is a QA Index of 111.3 and enables media plans with a qualified attention which is constantly above average.

Table 3: Campaign details

Plan	3: Campaign details Advertising Medium			Noting scores			Advertisement details		
	Title	Year	Issue	QA Ø	Ressort	QA %	QA Index	Page	Count
	Campaign- TOTAL			46.5		53,0	111,6		32
1	Brigitte	2012	16	46.3	Check-In	51,6	111,3	15	1
1	Brigitte	2012	5	46.3	Cooking & Housing / Housing	49,5	106,8	105	1
1	Focus	2012	28	42.9	Rubric / Focused	46,2	107,7	19	1
1	Focus	2012	7	42.9	Rubric / Focused	46,2	107,7	25	1
1	Focus	2012	22	42.9	Report	43,0	100,4	51	1
1	Freundin	2012	16	54.2	Heart & Mind	61,4	113,4	95	1
1	Freundin	2012	19	54.2	Heart & Mind	61,4	113,4	125	1
1	Freundin	2012	20	54.2	Heart & Mind	61,4	113,4	145	1
1	Freundin	2012	4	54.2	Heart & Mind	61,4	113,4	91	1
1	Freundin	2012	6	54.2	Heart & Mind	61,4	113,4	121	1
1	Spiegel	2012	28	45.3	Society	47,3	104,3	51	1
1	Spiegel	2012	30	45.3	Title	57,2	126,3	44	1
1	Spiegel	2012	32	45.3	Germany / Other	50,2	110,8	33	1
1	Spiegel	2012	36	45.3	Economy	49,6	109,4	75	1
1	Spiegel	2012	5	45.3	Germany / Other	50,2	110,8	49	1
1	Stern	2012	31	57.6	Abroad	63,4	110,1	41	1
1	Stern	2012	35	57.6	Cover Story	66,5	115,5	59	1
1	Stern	2012	17	57.6	Cover Story	66,5	115,5	45	1
1	Stern	2012	19	57.6	Other pages/ articles	67,6	117,5	101	1
1	Stern	2012	23	57.6	Germany	60,9	105,9	31	1
1	Wirtschaftswoche	2012	28	40.2	Politics & Global Economics	47,8	118,8	25	1
1	Wirtschaftswoche	2012	30	40.2	Business People / Head office	41,2	102,5	15	1
1	Wirtschaftswoche	2012	32	40.2	Business People	42,5	105,8	15	1
1	Wirtschaftswoche	2012	33	40.2	The Economist	51,8	128,9	39	1
1	Wirtschaftswoche	2012	35	40.2	Organizations & Markets	41,2	102,5	51	1
1	Wirtschaftswoche	2012	36	40.2	Politics & Global Economics	47,8	118,8	25	1
1	Wirtschaftswoche	2012	4	40.2	Politics & Global Economics	47,8	118,8	33	1
1	Wirtschaftswoche	2012	8	40.2	Organizations & Markets	41,2	102,5	55	1
1	Wirtschaftswoche	2012	10	40.2	Politics & Global Economics	47,8	118,8	35	1
1	Wirtschaftswoche	2012	16	40.2	Politics & Global Economics	47,8	118,8	25	1
1	Wirtschaftswoche	2012	17	40.2	Politics & Global Economics	47,8	118,8	27	1
1	Wirtschaftswoche	2012	19	40.2	Politics & Global Economics	47,8	118,8	27	1

Legend: QA: Qualified Attention

Step 2 - Choosing the right rubrics for the online campaign

Subsequently online media can be included into this media plan. To reach the most affordable coverage, it is important to place the ads in those rubrics of websites of the selected titles which promise the highest frequency of use. Table 4 shows an excerpt of PressEdge 2.0 online rubric coverage for further explanation. This table is based on the same target group and interview number as table 3. "Frequency of use" describes how many interviewees, who participated in a copy test to a title (e.g. "Der Spiegel"), visit the websites of the polled publication group (for "Der Spiegel" it is group J, see table 2). "Rubric usage online", however, provides information about rubric attention. Those with a high value were visited most frequently, so that the media planner can choose one rubric for every website (see bold percentages in table 4).

Table 4: Rubric usage online

	Frequency of use		
100.0	Base [All]	100.0	
46.3	www.brigitte.de	33.1	
29.8	www.freundin.de	22.8	
31.3	www.wiwo.de	36.6	
	Rubric usage online (excerpt): www.brigitte.de		
100.0	Base [User of www.brigitte.de]	100.0	
77.7	Recipes	65.4	
71.5	Fashion	57.3	
68.3	Housing	48.7	
58.5	Healthy	46.7	
1.5	(not applicable)	0.8	
	Rubric usage online (excerpt): www.freundin.de		
100.0	Base [User of www.freundin.de]	100.0	
71.2	Beauty	61.8	
61.5	Fashion	60.9	
61.4	Health	58.1	
56.9	Psychology	51.4	
4.4	(not applicable)	1.7	
	Rubric usage online (excerpt): www.wiwo.de		
100.0	Base [User of www.wiwo.de]	100.0	
73.4	Organizations	70.4	
67.9	Finance	68.1	
62.1	Politics	53.8	
54.9	Technology	51.9	
3.5	(not applicable)	3.1	
	46.3 29.8 31.3 100.0 77.7 71.5 68.3 58.5 1.5 100.0 71.2 61.5 61.4 56.9 4.4 100.0 73.4 67.9 62.1 54.9	100.0 Base [All] 46.3 www.brigitte.de 29.8 www.freundin.de 31.3 www.wiwo.de Rubric usage online (excerpt): www.brigitte.de 100.0 Base [User of www.brigitte.de] 77.7 Recipes 71.5 Fashion 68.3 Housing 58.5 Healthy 1.5 (not applicable) Rubric usage online (excerpt): www.freundin.de 100.0 Base [User of www.freundin.de] 71.2 Beauty 61.5 Fashion 61.4 Health 56.9 Psychology 4.4 (not applicable) Rubric usage online (excerpt): www.wiwo.de 100.0 Base [User of www.wiwo.de] 73.4 Organizations 67.9 Finance 62.1 Politics 54.9 Technology	

Legend: All values in vert. percent

Step 3 – Net audience of the advertising medium

Before including online publications into the media plan, the present plan with its ads placement in the chosen resorts has been transferred into "VerbraucherAnalyse" (VA) to include net audience of the advertising medium. VA is a German multimedia analysis similar to the international "Target Group Index" (TGI). With VA data you get a net audience for this present campaign of 51.5. By using QA % for weighting, we get values for advertisement noting (see bold values in table 5). As you can see, for example, QA % is higher than QA Ø, which proofs the higher attention of media campaign planned with PressEdge.

Step 4 - Inclusion of online media

VA data provides data for online evaluation, too. Besides page impressions (PI), it contains probabilities for online usage (at least once a week), so that it is possible to conduct the same calculation as is step 2 for print and online campaigns. To do this we again use QA %, but for online media. To generate these values, the percentages of the chosen online rubrics are used as indivual's weight to calculate QA for every rubric. When including the VA net audience of the advertising medium (57.2), we can generate QA % for the whole print and online campaign, which turns out to be 48.0 and is therefore a lot higher than for print only (42.3, see table 5). The possibility to generate a higher return on invest (ROI) with PressEdge 2.0 is obvious.

Table 5: New media plan with print and online media

Plan	Advertisung Med	ium	Noting scores			
	Title	QA Ø	Ressort	QA %	QA Index	
	Campaign-TOTAL	46,5		53,0	111,6	
2	Brigitte	46,3	as in table 3	50,6		
3	Focus	42,9	as in table 3	45,1		
5	Freundin	54,2	as in table 3	61,4		
5	Spiegel	45,3	as in table 3	50,9		
5	Stern	57,6	as in table 3	65,0		
12	Wirtschaftswoche	40,2	as in table 3	46,0		
	Print only	40,5		42,3		
1	Brigitte		Recipes	65,4		
1	Focus		Politics	71,2		
1	Freundin		Beauty	61,8		
1	Spiegel		Politics	77,7		
1	Stern		Politics	73,4		
1	Wirtschaftswoche		Organizations	70,4		
	Print+Online			48,0		

Legend: QA: Qualified Attention

The described analysis is to be conducted via an especially for PressEdge developed software. With a good ease of use, the software provides the media planner an instrument for quick and easy to learn optimization of ads placement. The software is a customization of m-cloud, which is a web-based media planning and counting tool. It includes additional information from the stated above and linked data bases. Accordingly, desired evaluations can easily be conducted in this way, whereas database information is not limited. As m-Cloud is a web-based instrument, there are no limits in use – the planner can have access to it anyplace and anytime.

4.0 Summary

How do media planners benefit from PressEdge 2.0?

The results show, which editorial content of a publication is read in print and which online and therefore, they provide pivotal information in form of a comprehensive planning file to media planners about the cross-media usage behaviour of their target group. Inside publication groups, PressEdge 2.0 provides additional information about the cross-publication usage of the readership. With PressEdge 2.0, media planners cannot only use the potential of their target group reading "Der Spiegel" in print and online publications, but have additional information about the usage of common online media, like "Stern" as well. PressEdge 2.0 therefore gives empirical information about the demanded contents for multiple publications. Eventually the media planner has a detailed data base for target-oriented ads placement with a simultaneously high probability to attract attention. So, it helps to keep costs low while simultaneously increasing attention in the target group.

Future Prospects

Due to reasonable interview duration, the interviewees weren't polled to all online titles that are part of this study. But as online media usage is still increasing, evaluation of this is becoming more and more important to the media planner. To meet this requirement, another PressEdge study – as an addition to PressEdge 2.0 – is supposable and picks especially online media. For this purpose, it is considered to combine an online panel evaluation with a CATI survey. We may use a data base delivered by AGOF (Arbeitsgemeinschaft Online Forschung e. V., an association that researches the usage of online media in Germany) after testing the validity. A better solution would be to develop a new survey that precisely meets the objectives of PressEdge and which would provide the basis for PressEdge 3.0. This is an important topic on which we are working currently to integrate it into the next wave. With this media comprehensive approach, ads placement is getting even more efficient with a higher expected attention by target groups and a better cost planning.

Although tablets are mainly used within the home, in May 2013, the Technology Tracker found that nearly four in ten tablet users claim to use them out of home and a quarter use them whilst travelling (see Figure 1, below). This growth impacts on every area of our lives, from how we communicate with each other, to how we plan our days, how we travel and, importantly, the media we consume.