



# media senses

## Tablets are redefining consumer experiences

As a nation, the UK is media and technology obsessed, with more than half of the population using two devices, and 30 per cent using three or more devices to get online, this is four times higher than the European average\*. Yahoo!'s latest primary research study *mediasenses* explores the disruptive impact tablets are having on consumer media experiences and the emerging opportunities for advertisers.

Tablets are quickly becoming a daily habit device. Consumers love the ability to touch, hear and see everything this device has to offer and maximising how this device interplays with other media. From the browsing renaissance, to the video and shopping (T-commerce) nuance, this research explores how tablets have impacted on the media landscape, and are now providing consumers with deeper sensory experiences.

## Key Insights

### The Role of the Senses

The importance of the additional sense that tablets control — TV is sound and vision, radio is sound, print is touch and vision — tablet leverages sight, sound and vision, giving it a different relationship with consumers.

Four out of five people have the sound on when they interact with their tablet. This means that the tablet is the only device that owns all three senses. This sensory relationship will evolve even further with the emergence of 360° experiences on the tablet device.

### The Renaissance of Browsing

Browsing is back! Qualitatively this research discovered that the tablet experience is creating more of an emotional mindset with consumers, allowing for a less functional relationship with the device. We are witnessing a resurgence in browsing and consumers are getting back to primarily enjoying a web experience.

\* Mediascope study 2012

### T-commerce and Purchasing

60% of tablet users are shopping via the device on a weekly basis. This research study found that the tablet's role in the traditional purchase process lies very much around the interest, decision and desire stages. What differentiates this from PC or desktop purchasing is the tactile experience and more emotionally-led behaviours, meaning that products are 'closer' to the consumer.

### Advertising

The consumer expectation is that tablet advertising will reach parity with TV, and leads all other media in its ability to control the senses. Consumers see the unique attributes of tablet advertising as clever, exciting and innovative, in keeping with a device that is such a disruptive force.

### What we did

Multi-phased quantitative and qualitative research:

#### Expert Interviews

Industry experts share their views on how tablets are changing the media landscape.

#### Real time tablet web diary

To capture consumer usage of the device as it happened.

#### Living room interviews

To explore how tablets have changed the household media dynamic.

#### Quantitative study

Sample of 500 representative tablet users to understand attitudes and device behaviour.

### Key stats



Tablet is now a daily habit for 4 in 5 users



78% of time spent with a tablet is with the sound ON



74% of under 35s look for TV related content on tablet whilst watching TV



90% of tablet users watch video content

**70%** of under 35s rank tablet as important as TV

