Teens

- Q1 2014 -

GWI AUDIENCE REPORT

SUMMARY

Placing a spotlight on the digital behaviors of the teen demographic

globalwebindex

#1

INTRODUCTION

GWI Audience reports are designed to examine the digital behaviors of particular demographic groups – showcasing trends over time as well as analyzing how the audience in question compares to the general internet population.

In this report, we focus on the teen audience – defined as 16-19 year-olds born between 1994 and 1997. Often considered as trendsetters, members of this generation are true digital natives: the internet and multiple screens have been a part of their daily lives from an early age.

With teen behaviors having received much attention in recent months – from their adoption of mobile messaging services to their usage of Facebook – this report draws on our research program across 32 countries and nearly 90% of the global internet audience to look at:

- How and why teens are going online
- Usage of mobiles and tablets
- Engagement with social and gaming platforms
- How teens are consuming media and content
- The ways they interact with brands and discover new products
- Regional and country-specific trends

In this summary, we provide the key headlines and statistics from the report. For more detailed insights, coverage and implications, please see the full version. Clients can also explore the behaviors and interests of this group further through the Pro Platform.

#2

KEY TRENDS

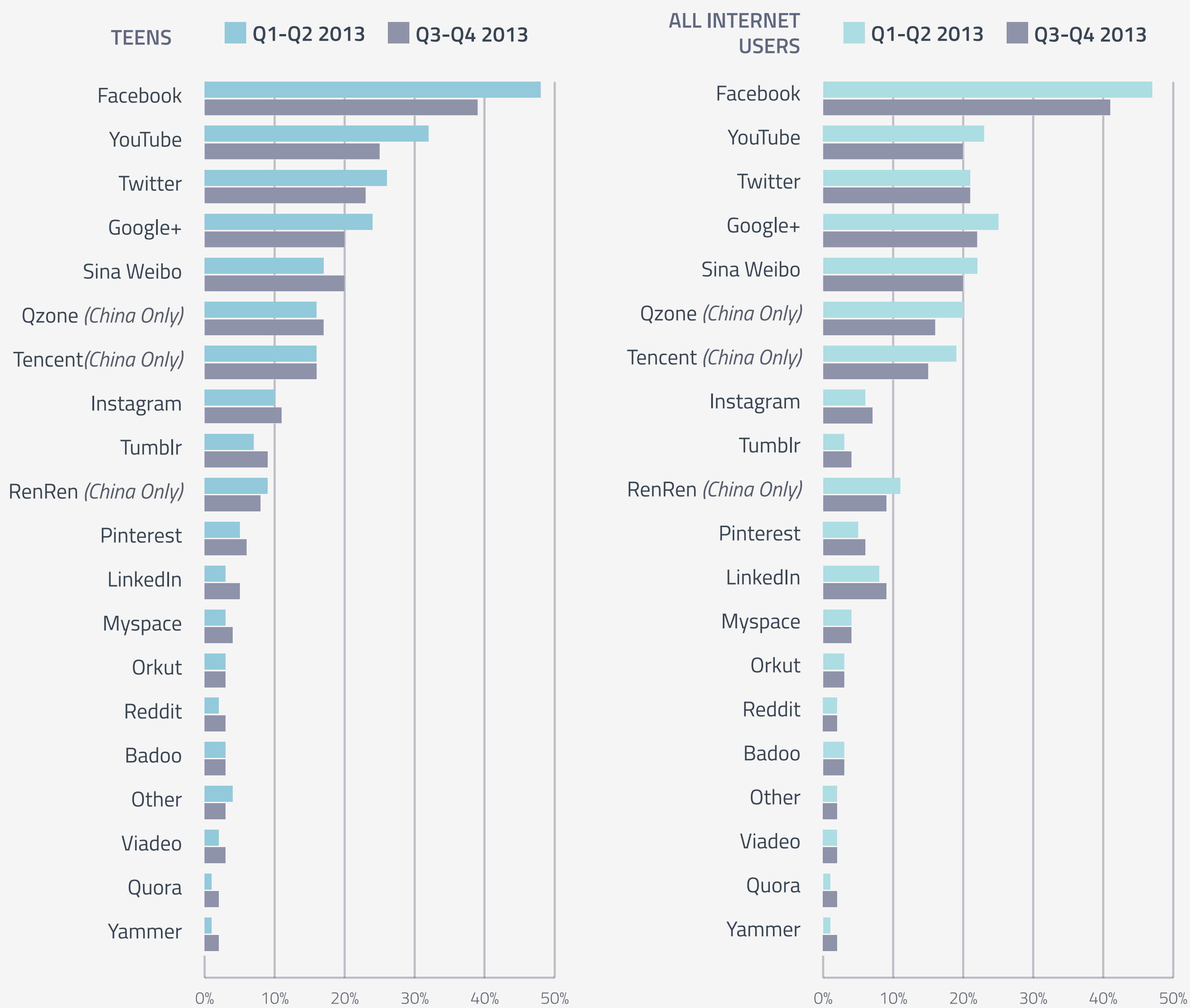
- Teens Embracing Messaging Tools
- Mobiles & Tablets on the Rise, but Device Sharing is Common
- Teens Using New Brand Discovery Channels
- Second-Screening is Widespread
- Android is the Operating System of Choice
- Majority of Teens Pay for Digital Content Each Month

TEEENS EMBRACING MESSAGING TOOLS

▪ The biggest social platforms all lost active teen users during 2013: the percentage regularly contributing to Facebook dropped by 9%, with falls also recorded for YouTube (-7%), Twitter (-3%) and Google+ (-4%). However, the numbers with accounts on these sites remained largely stable, indicating that 16-19s are not abandoning the big social platforms but are using them less frequently.

▪ Mobile messaging apps enjoyed rapid rises during 2013, led by Snapchat (+60%) and Kik Messenger (+59%). Facebook Messenger remains the number one app in this space (25%), although WhatsApp and WeChat are now hot on its heels – both being used by 20% of teens at a global level. Clearly, then, the social space is assuming an increasingly mobile and real-time character for the teen demographic.

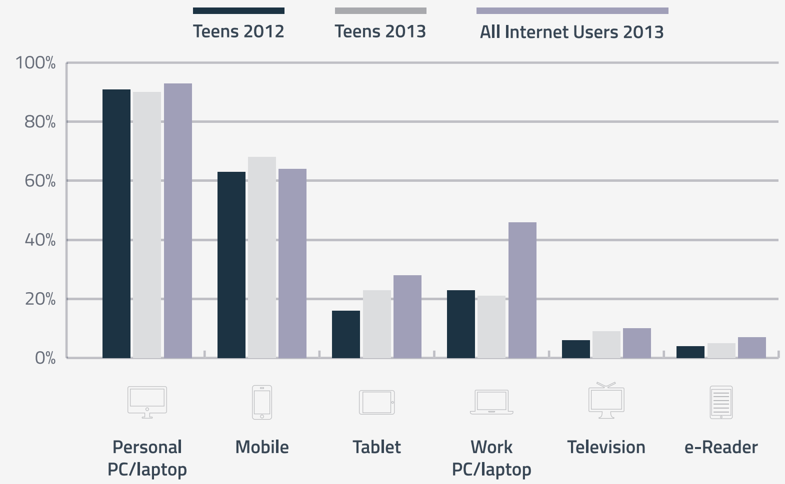
Top Social Networks by Active Usage



Question: Which of the following services have you used or contributed to in the past month using any type of device? /// **Source:** GlobalWebIndex Q4 2013 /// **Base:** Internet Users aged 16-64

MOBILES & TABLETS ON THE RISE, BUT DEVICE SHARING IS COMMON

Devices used to Access the Internet



Question: In the past month, from which of the following devices have you accessed the internet either through a web browser or an application? /// **Source:** GlobalWebIndex Q4 2013 /// **Base:** Internet Users aged 16-64

▪ Portable devices continue to grow in importance for teens – mobiles and tablets are now being used by 68% and 23% respectively to access the internet (up by 5% and 7% compared to 2012).

▪ Teens are ahead of the total online population for using the internet on a mobile but behind others for tablets, indicating that their expense remains an access barrier for this audience.

▪ Similarly, 55% of teen tablet users say they share their device with other people, showing that many do not own one outright.

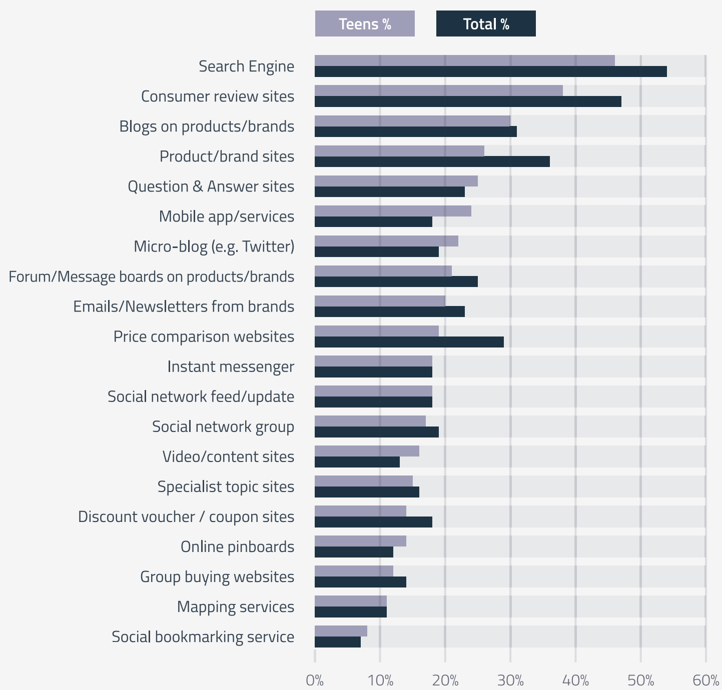
▪ Even for mobiles – a device usually considered to be much more "personal" – some 29% of teens report that they share them with others.

TEENS USING NEW BRAND DISCOVERY CHANNELS

▪ Teens want brands to reward and entertain them – 40% of this audience say that brands should be providing entertainment, while 56% claim that gifts/rewards increase the likelihood of them advocating a brand online.

▪ 16-19s are less likely than other internet users to turn to platforms such as review sites, price comparison tools, search engines or brand websites. In contrast, they are ahead of average on using newer channels such as pinboards, Q&A sites, micro-blogs, video/content sites and apps. Over 20%, for example, say they use mobile apps and micro-blogs when they are actively in search of product information online.

Sources Used to Research Product Information



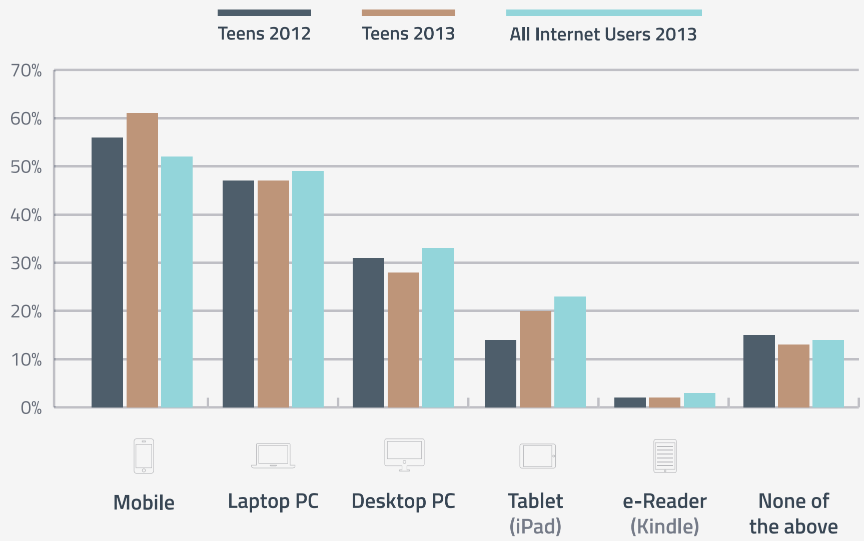
Question: Which of the following online sources are you primarily using when you are ACTIVELY looking to find out more information about brands, products, or services? /// **Source:** GlobalWebIndex Q4 2013 /// **Base:** Internet Users aged 16-64

SECOND-SCREENING IS WIDESPREAD

- Almost all 16-19 years-olds are second-screeners, a trend being driven most strongly by mobiles.

- The most common reasons for dual-screening while watching television are to chat with others (72%) and play games (52%), areas where teens over-index considerably compared to the general online population. This reflects their approach to internet usage more generally: this demographic is highly social and playful in nature.

TV Second-Screening



Question: Which of the following devices have you used while watching TV? /// **Source:** GlobalWebIndex Q4 2013 /// **Base:** Internet Users aged 16-64

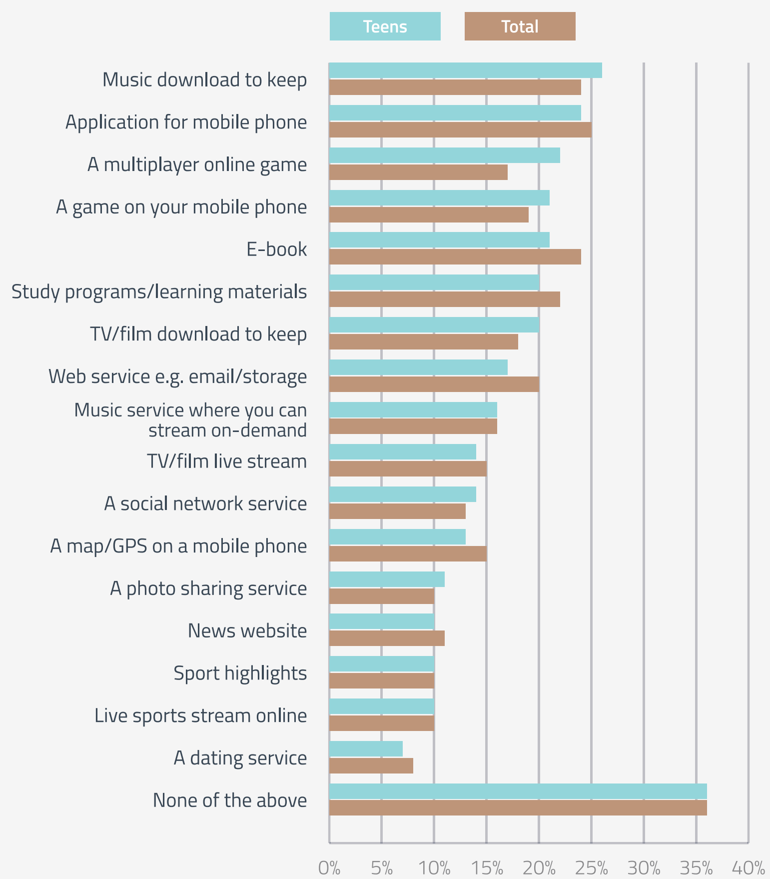
MAJORITY OF TEENS PAY FOR DIGITAL CONTENT EACH MONTH

- Nearly two thirds (64%) of online teens are paying for some form of digital content or service each month – a figure which is in line with the figure for the total internet population.

- Teens are most likely to pay to music downloads (26%), mobile apps (24%) and multiplayer online games (22%, an area where they have a lead over other users).

- Nevertheless, that 16-19s are making digital purchases across such a wide range of areas indicates how diverse the monetization opportunities are with this audience.

Paying for Digital Content

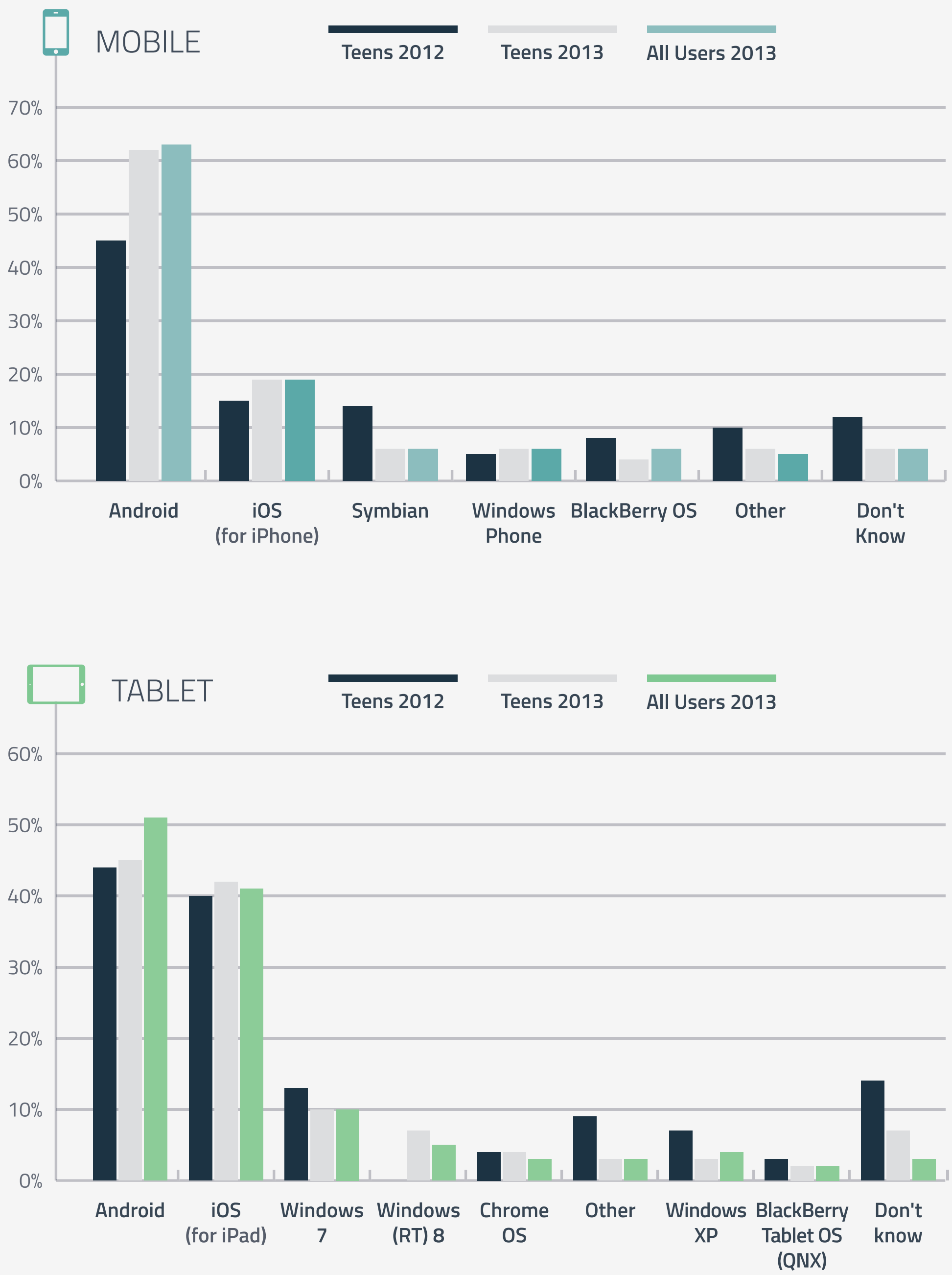


Question: Which of the following types of online content have you paid for in the past month? /// **Source:** GlobalWebIndex Q4 2013 /// **Base:** Internet Users aged 16-64

ANDROID IS THE OPERATING SYSTEM OF CHOICE

- Android is the favored OS for the teen demographic.
- On tablets, the contest is very close and Android (45%) is only just ahead of iOS (42%).
- On mobiles, however, the percentage of teens using Android (62%) is more than three times greater than the equivalent for iOS (19%). This also represents a rise of 17 percentage points for Android between 2012 and 2013.

Mobile and Tablet Operating Systems



Question: What operating system runs on your mobile? What operating system runs on your tablet? /// **Source:** GlobalWebIndex Q4 2013 /// **Base:** Mobile and Tablet Users aged 16-64 /// Please note the total figure exceeds 100% due to some respondents owning/using more than one mobile/tablet

Jason Mander

Head of Trends

E jason@globalwebindex.net /// T +44 20 7731 1614

A Bedford House, 69-79 Fulham High Street,

London, SW6 3JW, England

www.globalwebindex.net