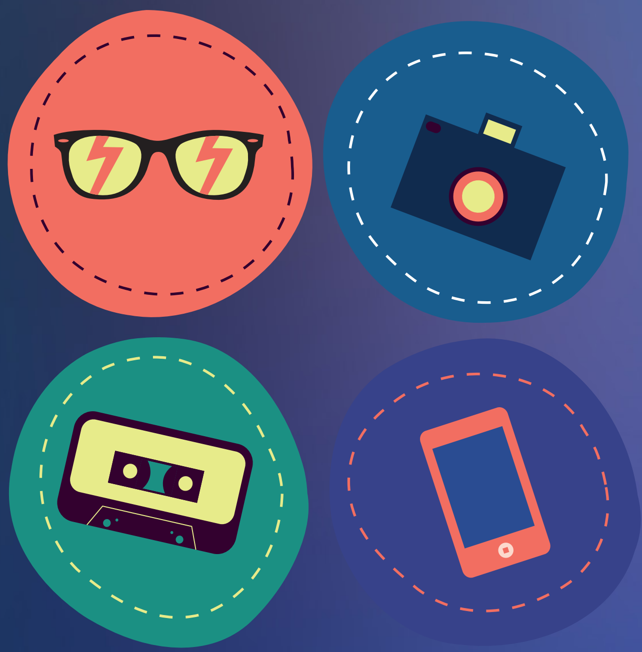
globalwebindex

TEENS

Examining the online behaviors and attitudes of teenagers aged 16-19

SUMMARY



GWI AUDIENCE REPORT

Q1 2015

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 audiences in question compare to the overall internet population.

In this report, we focus on Teens – defined here as 16-19 year-olds. Drawing on data from our research program, which covers 32 countries and nearly 90% of the global internet audience, we offer insights on:

- How and Why Teens are Going Online
- Mobile and Tablet Usage
- Social Media Activities
- Online Entertainment
- E-Commerce Trends
- Brand Engagement

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.

NOTES ON METHODOLOGY

Each year, GWI interviews more than 170,000 internet users across 32 markets – making it the largest on-going study into the digital consumer instigated to date.

Research is conducted in quarterly waves, each of which has a global sample size of more than 40,000 internet users. Typically, we interview between 3,000 and 4,000 people per market per year, with larger sample sizes of 30,000 in key markets such as the UK and the US. Data is collected in the last six weeks of every quarter, ensuring it is as up-to-date as possible.

Respondents complete an online questionnaire that uses stratified sampling techniques to ensure that they are representative of the internet population aged 16 to 64 in each country (with correct proportions in terms of gender, age and educational attainment).

This data is used to calculate the universe estimates which we present throughout this report. Universe figures are designed to provide highly informed approximations as to the number of users (in millions) that any percentage represents.

Unless otherwise stated, all of the data that appears inside the report is based on our Q3 and Q4 waves of research among 83,806 online adults aged 16-64; within this sample, there were 4,849 individuals aged 16-19.

OVERVIEW OF TEENS

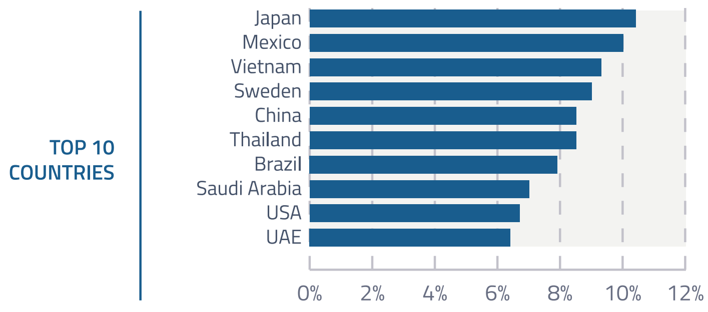
▪ Across GWI's 32 surveyed markets, **7% of the internet population aged 16-64 are teens** – defined here as 16-19 year-olds.

▪ The online teen population skews slightly towards males (58% vs 42% females); this is a result of demographic patterns in large and influential fast-growth markets such as India, where men dominate in terms of internet usage. In terms of **location, 6 in 10 teens are living in urban areas and one quarter are suburbanites.** More than half preferred not to state their income; in part, this is because 6 in 10 are still students.

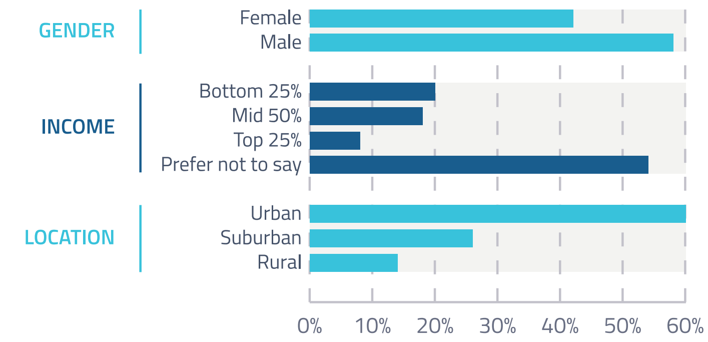
▪ **Half of teens are worried about online privacy issues and how their personal data is being used, while 47% say they like to be anonymous online.** Even so, this group is less likely to be worried about these issues than older internet users.

The Demographics of Teens

% Internet Population who are Teens



Profiling Teens



Source: GlobalWebIndex Q3-Q4 2014 /// **Base:** Internet Users Aged 16-19

TEENS AND THE INTERNET

▪ **Online entertainment is key for teens;** watching video clips is the most popular online activity and half are using TVoD services.

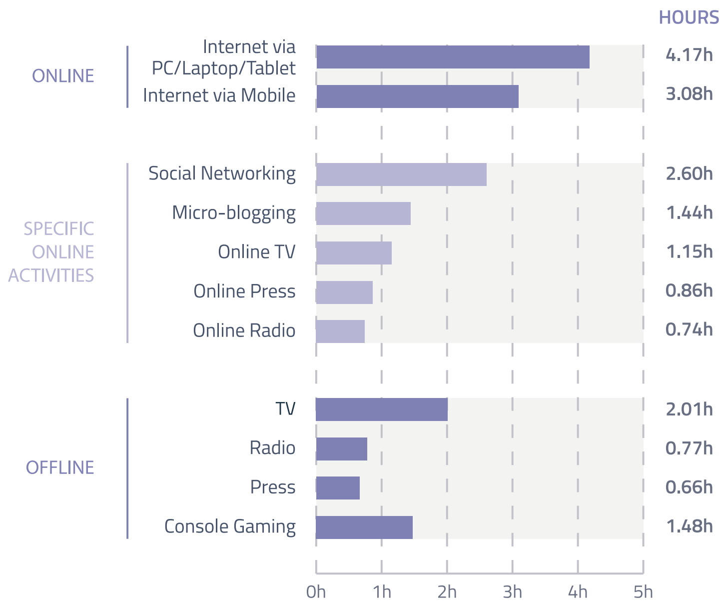
▪ **Teens spend an average of 1.15 hours watching online TV daily** (vs 2 hours on linear TV).

▪ **Teens are less likely than average to be paying for online content** but 1 in 5 are watching Netflix each month (rising to 58% in the US). For music, SoundCloud is more popular globally than Spotify.

▪ **A quarter of teens have used a VPN, with access to better entertainment content being a key reason.** One third are using ad-blockers.

Media Consumption Behaviors

Average Time Spent Per Day on....



Question: On a typical day, roughly how many hours do you spend on/doing the following? /// **Source:** GlobalWebIndex Q3-Q4 2014 /// **Base:** Internet Users Aged 16-19

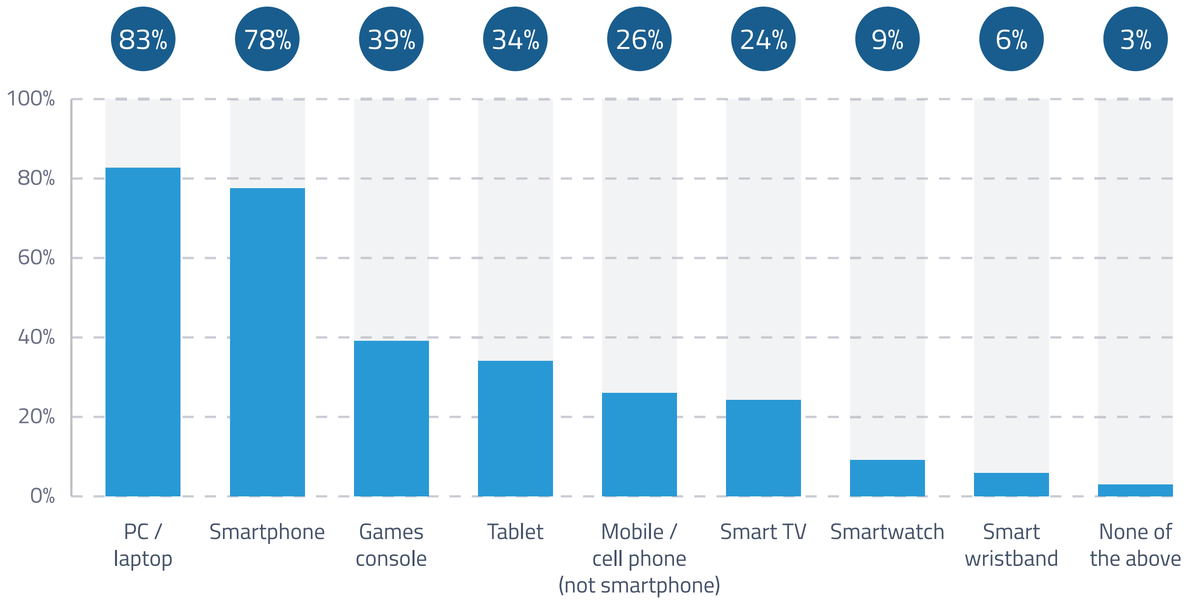
Want to explore this data on the PRO Platform? Enter "Time Spent" in the free search box, or click **Media Consumption > Cross Media Consumption > Time Spent...**

DEVICE TRENDS

- **8 in 10 now own a smartphone,** but teens continue to under-index for tablet ownership.
- **Teens are averaging 3 hours per day on the mobile web,** yet 4G has yet to make a mark (only 16% are using it).
- **8 in 10 teens second-screen as they watch TV, with mobiles the top device.** While doing this, they are most likely to be chatting with friends and gaming.
- **Teens average 1.5 hours of console gaming per day, while one third are mobile gamers.** The Wii is as popular as the PS3 among teens and 1 in 5 are planning to buy a PS4.

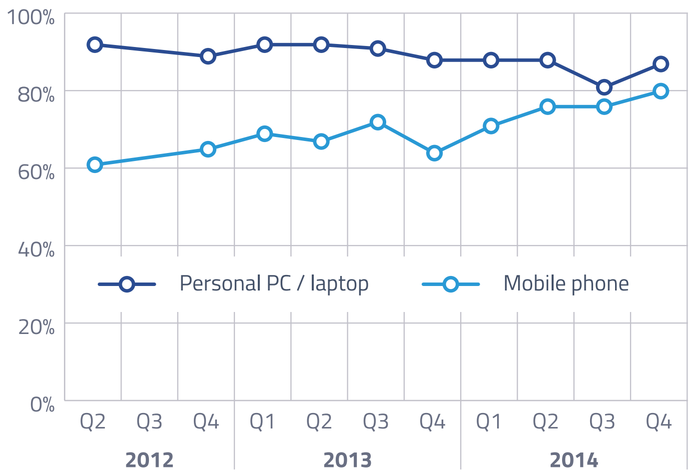
Device Ownership and Usage

% who personally own the following



PC and Mobile Internet Access Over Time

% who access internet via PC and Mobile



Question: Which of the following devices do you personally own? 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 Q3-Q4 2014 /// **Base:** Internet Users Aged 16-19 /// **NOTE:** respondents see the following defitions/illustrative examples: **Smartphone:** "a phone that allows you to download apps, send/receive emails and browse the internet. Smartphones include iPhone, Blackberry and Android phones such as the Samsung Galaxy s5". **Tablet:** e.g. an Apple iPad, Samsung Galaxy Tab, Microsoft Surface, Google Nexus. **Smart TV:** a television that can connect to the internet. **Smartwatch:** e.g. Pebble, Sony Smartwatch, Samsung Galaxy Gear. **Smart wristband:** e.g. Nike Fuelband, Jawbone Up, Adidas miCoach.

Want to explore this data on the PRO Platform? Enter "Device Ownership" in the free search box, or click **Internet Landscape > Access Points > Device Ownership.** Alternatively, you can download our pre-cut "Device Ownership" data pack

SOCIAL MEDIA

▪ **Facebook remains the top platform (almost half are active users) but its popularity is falling.** Meanwhile, a quarter are active on Instagram and 15% are now using Tumblr.

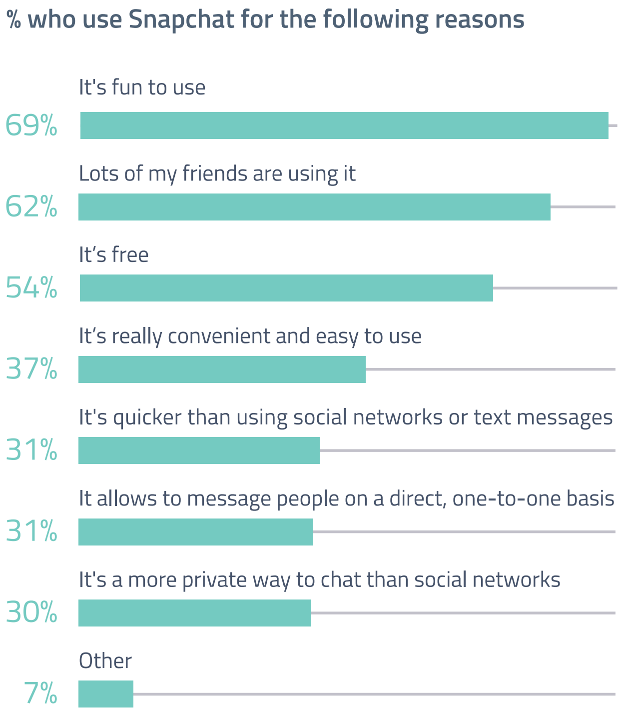
▪ **In the UK and USA, two thirds of teen Facebookers say they are using the network less,** mostly citing lack of interest and boredom as the reasons.

▪ **3 in 10 US teens are using Snapchat, as are 14% globally.** These Snapchatters are most likely to say they are using the service because it is fun, free and popular.

Top 10 Snapchat Markets

Question: Which of the following mobile / tablet applications have you used in the past month on any device? Snapchat /// **Source:** GlobalWebIndex /// **Base:** Internet Users Aged 16-19

Reasons for Snapchat Usage



Question: Please can you tell us the reason(s) why you use the following applications on your mobile phone or tablet? /// **Source:** GlobalWebIndex Q3 2014 /// **Base:** Snapchat Users Aged 16-19

Want to explore this data on the PRO Platform? Enter "Applications" in the free search box or click **Apps > Specific Applications > Specific Applications Used.** Alternatively, you can download our pre-cut "Mobile Apps Active Usage: Named Apps" data pack

COMMERCE

▪ **Just over half of teens are online shoppers, putting them a little behind average.** One third are engaging in m-commerce but only 1 in 8 used a tablet to shop online last month.

▪ **Clothes and shoes are the most purchased products online,** while mobiles are the most reviewed.

▪ **Free delivery is the most important purchase driver.** Nevertheless, a quarter say they are influenced by social network-based retail stores, illustrating the potential impact of social commerce among this audience.

Top 10 Purchase Drivers

% who say the following make them more likely to buy something online

Question: Which of the following online activities from a brand are most likely to positively influence your consideration to purchase? /// **Source:** GlobalWebIndex Q3-Q4 2014 /// **Base:** Internet Users Aged 16-19

Want to explore this data on the PRO Platform? Enter "Purchase Consideration" in the free search box, or click **Marketing Implications > Brand Activation > Motivation to Drive Purchase Consideration.** Alternatively, you can download our pre-cut "Communications Power (Online Channels)" data pack

BRAND ENGAGEMENT

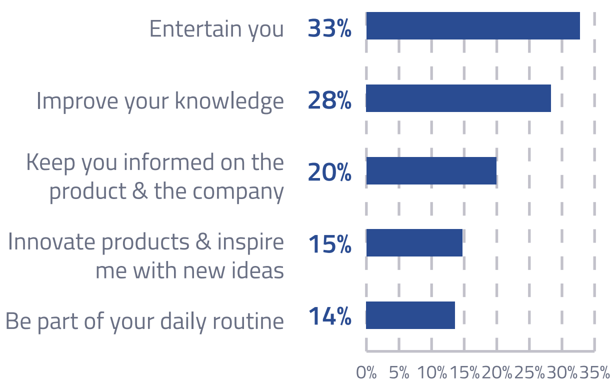
▪ **Entertainment is the most important brand role for teens.** Also, 3 in 10 discover brands through TV shows/films and one quarter are influenced by celebrity endorsements.

▪ **Half of teens watch vlogs each month, but less than 15% discover brands through them and only 1 in 10 use them to research products.**

▪ **One fifth watch branded videos monthly** and teens are more likely than average to promote a brand online in exchange for exclusive content.

Top 5 Brand Roles

What Teens want brands to do/provide



Want to explore this data on the PRO Platform? Enter "Brand Role" in the free search box, or click **Marketing Implications > Brand Role > Brand Role in Consumer's Life.** Alternatively, you can download our pre-cut "Consumer Engagement Preferences" data pack

Question: How would you want a brand you like to act towards you? /// **Note:** Respondents can chose a maximum of 3 answers /// **Source:** GlobalWebIndex Q3-Q4 2014 /// **Base:** Internet Users Aged 16-19

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