



2012 Teens & Young Adults

Google/Ipsos MediaCT
U.S., July 2012

Objective

To gain a better understanding of the Teen and Young Adult audience overall, but particularly in terms of their behaviors related to decision making and how they search for information via both offline and online channels.

Methodology

15 minute Attitude & Usage survey to examine attitudes and behaviors among a total of 7,005 U.S. respondents; recruited from May 31st to June 12th, 2012

- N=6,005 Teens/Young Adults ages 13–24
- A general population control cell of 1,000 respondents ages 18–64 year olds was also included for comparison purposes

Key Findings

- 1** **The Internet is an everyday part of teens' and young adults' lives, and is central to the way in which they entertain themselves, find information, and learn;** as an advertiser it is critical to be present across many digital platforms in order to engage this audience. Online video, search, and social networks build upon each other.
- 2** **Teens and young adults prove that video is migrating online,** especially when comparing to the general population. Online video ads have huge potential in capturing this group. However, it is important to understand the mindset of this target and what types of advertising will grab their attention – entertaining, exciting, and funny.
- 3** **This audience is involved and/or interested in being part of a cause or movement,** though involvement is fragmented across many causes. Digital media and platforms such as search, online video, and social networks are ideal for generating awareness, building familiarity or knowledge, sharing content, and supporting or identifying with organizations.

Key Findings

4**Online video is a crucial digital platform in reaching this audience.**

About 9 out of 10 teens and young adults watch online video, significantly greater than the general population. About 2 out of 5 spend more time watching online videos than regular TV. Video ad exposures revealed strong performance indicators.

5**Search prompts action for teens and young adults. 4 out of 5 have taken action as the result of search.**

Relevancy, familiarity, and trust are equally important in influencing which search results are clicked on.

6**Social networking sites are used almost as broadly as online video and search**

– roughly 3 out of 4 have used one. Teens and young adults who use a social network are 33% more likely to be on Google+ than the general population (39% vs. 30%). 3 in 10 are *following, liking, or +1'ing* an organization or group they are interested in.

Key Findings

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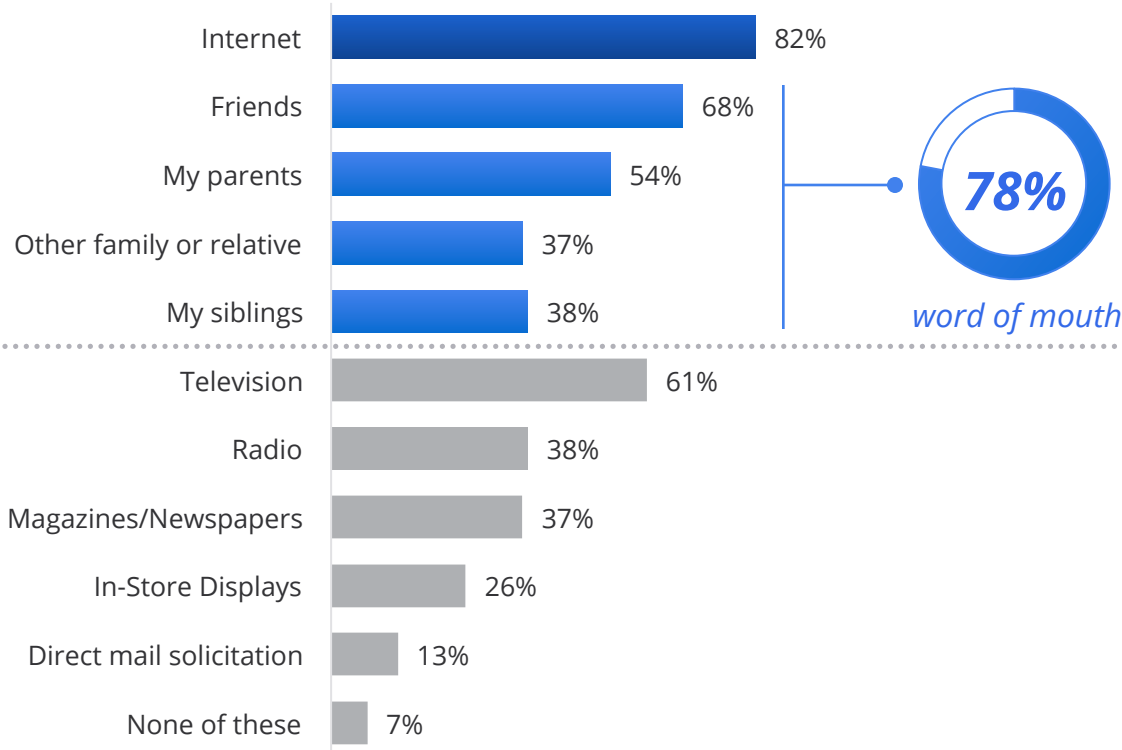
Teens and young adults are not just accessing the internet on their PCs, but are staying connected using their smartphones and tablets as well.

- Nearly half use a smartphone and are spending more time on them than the general population.
 - Half of smartphone users report spending more time on them versus last year.
- Search (74%), social networks (61%), and online video (46%) are being used by many smartphone users.
 - Social networks and online video sites are accessed by more teens and young adults compared to the general population.
- Tablets are used by fewer teens and young adults relative to smartphones, but look for this to grow as penetration increases.

Internet consumption is nearly twice that of TV and is the #1 source used to gather info

Sources used to learn more about a topic of interest

Teens / young adults (n=6,005)



Time spent online in an average week



15hrs

Time spent watching TV in an average week



7.5hrs

Source: Google/Ipsos Media CT, "2012 Teens & Young Adults" study, U.S., July 2012

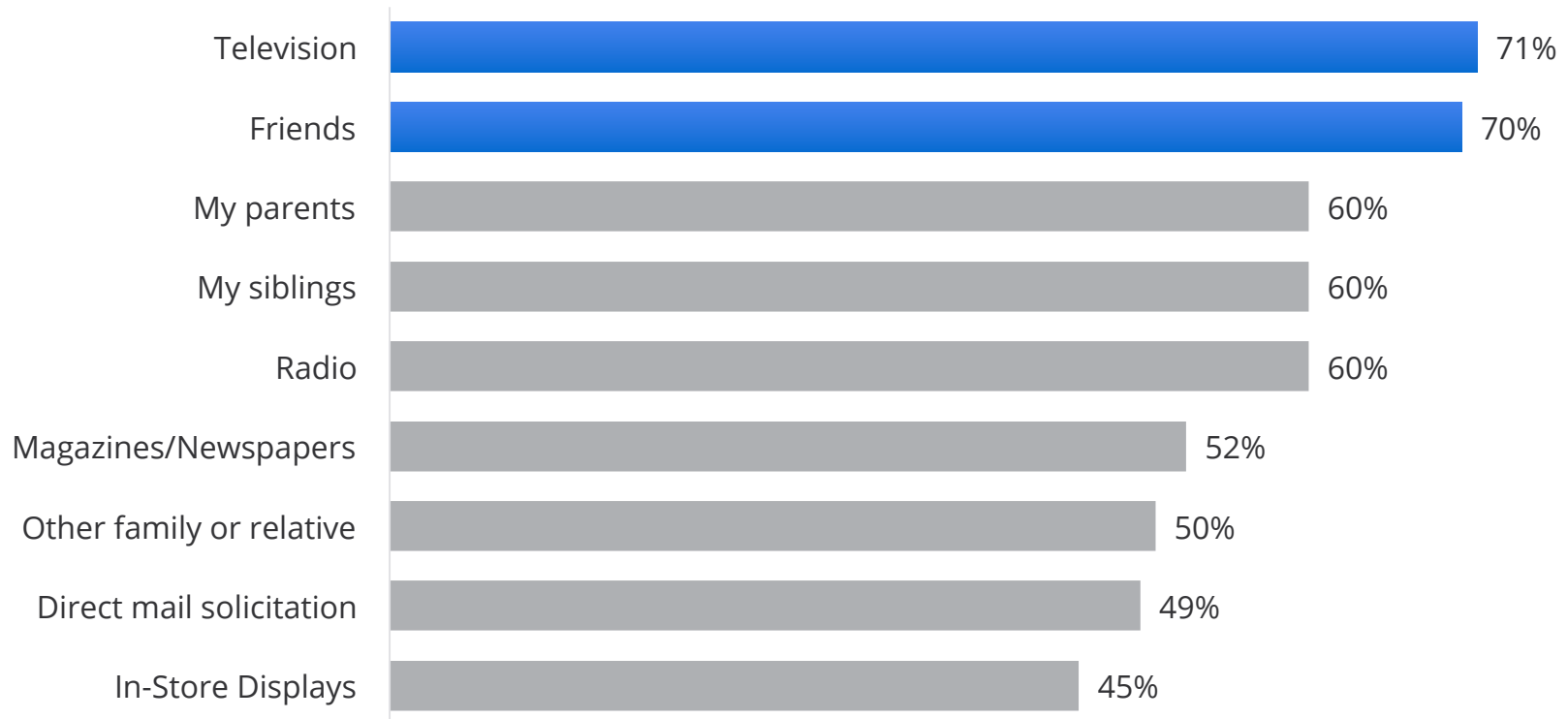
Q1: Approximately how much time do you spend on each of the following activities in an average week? Please select an amount of time for each activity.

Q6: We'd like to get a sense of how you typically gather information on topics that interest you or that you want to learn more about. Select all the sources you use to gather information.

Traditional media, friends, and family are driving online search






Sources prompting an online search – at least weekly

Teens / young adults (n=range 782-4,934)



Watching video tops the list; search and social networking are key alongside games and music

Top 5 activities done online

#1		Watch video	82%
#2		Play games	76%
#3		Use a search engine*	74%
#4		Visit social network sites	73%
#5		Listen to music or podcasts	70%

Source: Google/Ipsos Media CT, "2012 Teens & Young Adults" study, U.S., July 2012

* Search is the #1 source used to gather info

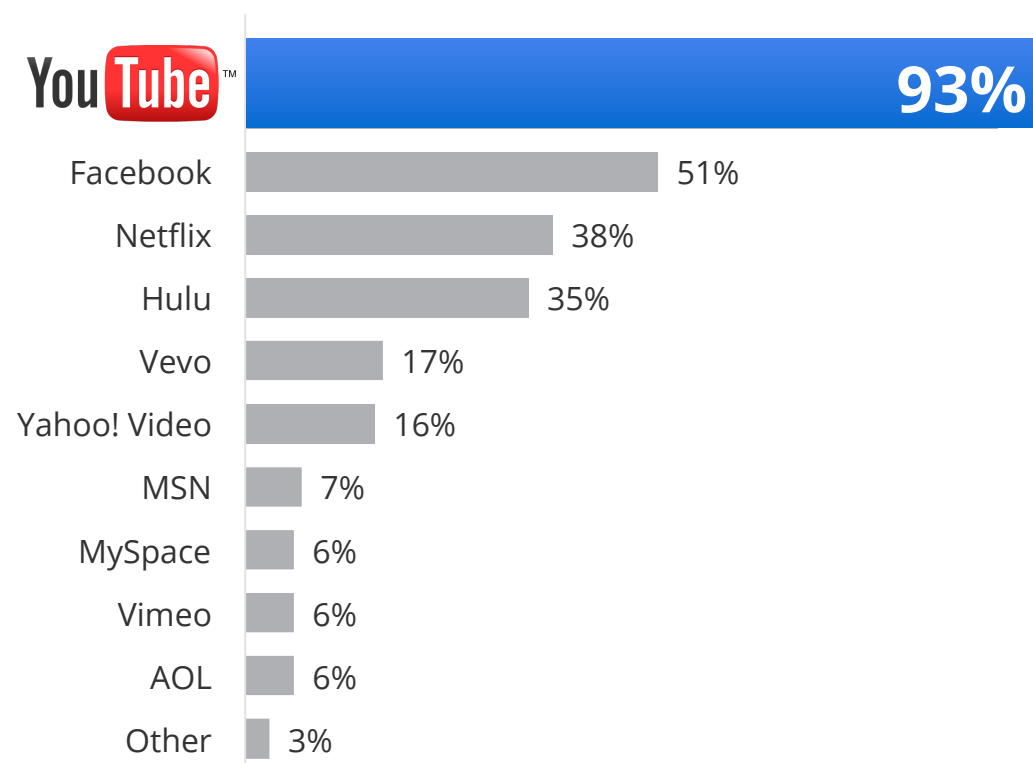
Q2: Which of the following activities do you ever do online? Select all that apply.

Q3: Here is one more list of online activities. Which of these activities do you ever do online? Select all that apply.

In fact, many are spending more time watching online videos than TV – **YouTUBE is most used**

Online video websites used

Teens / young adults (n=6,005)



44%

*of teens/young adult
online video users spend
**more time watching
online videos than TV***

vs. 27%

of general pop

Source: Google/Ipsos Media CT, "2012 Teens & Young Adults" study, U.S., July 2012

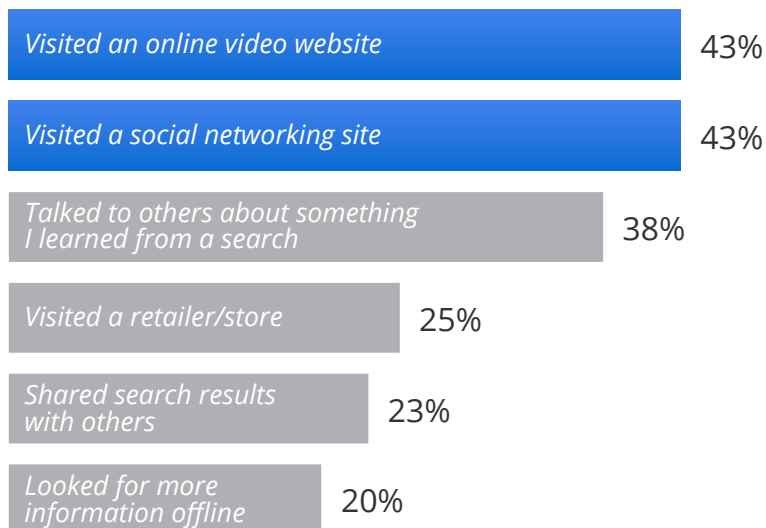
Q13: Which of the following online video websites (e.g., YouTube, Yahoo! Video, Hulu) do you use to watch online videos (including all online content such as videos, shows, movies, etc.)? Select all that apply.

Q15: In general, thinking about the time you spend watching online videos (including all online content such as videos, shows, movies, etc.), which of the following are true for you? Base: Online Video Users

Search and online video prompt action

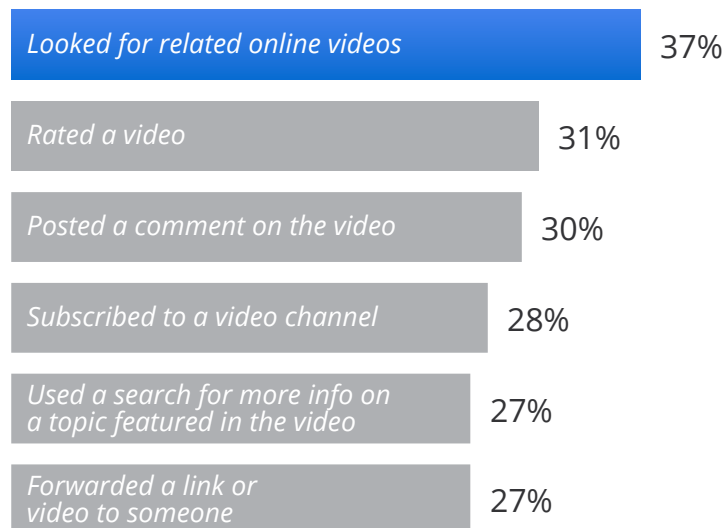
 **95%**

of search users who have taken action as a result of search



 **91%**

of online video users have taken action as a result of online video



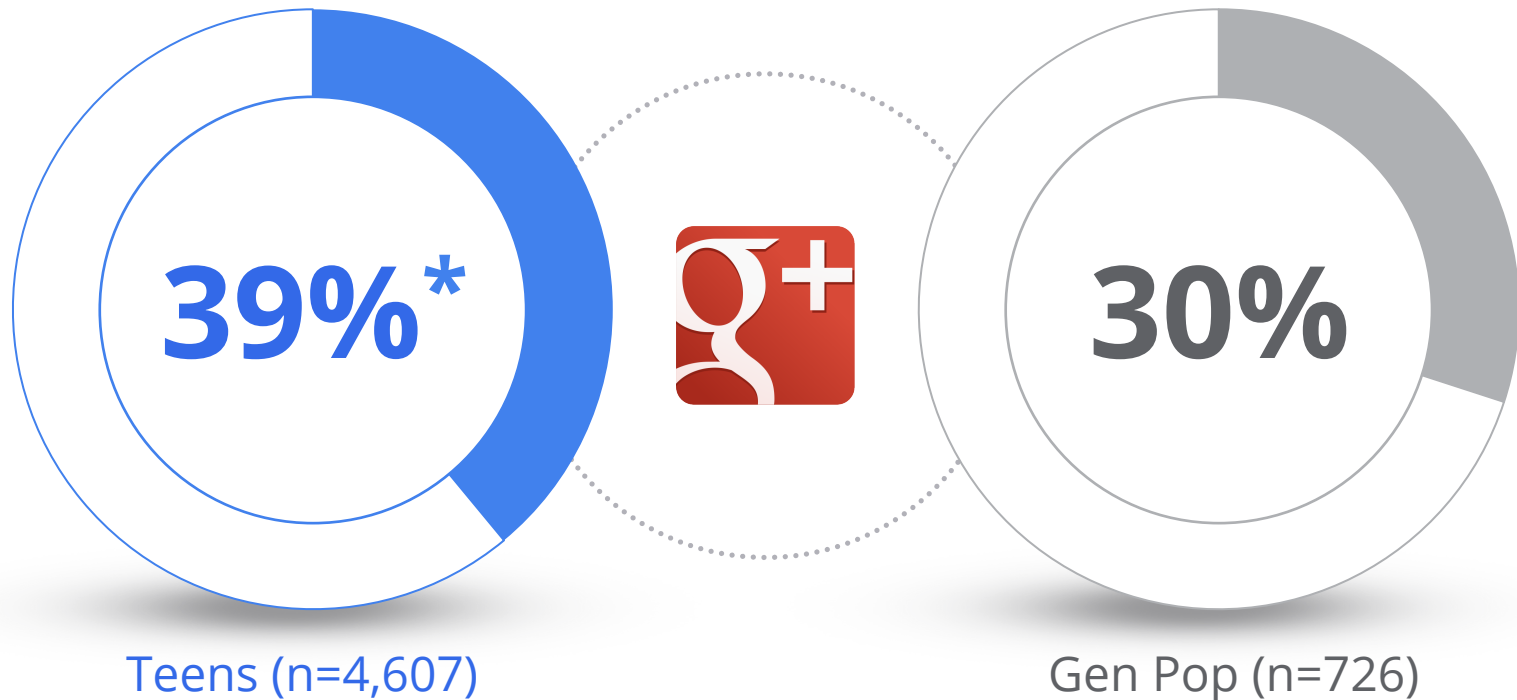
Source: Google/Ipsos Media CT, "2012 Teens & Young Adults" study, U.S., July 2012

Q10: Which of the following actions, if any, have you taken as a result of using search engines (like Google, Yahoo!, Bing, etc.)? Please select up to three responses.
 Q17: Have you ever taken any of the following actions as a result of viewing videos (including all online content such as videos, shows, movies, etc.) on online video websites (such as YouTube, Yahoo! Video, Hulu)?

Base: Search Users N=4,792. Base: Online Video Users N=5,152

Google+ is used by more teens and young adults

Member of Google+



Source: Google/Ipsos Media CT, "2012 Teens & Young Adults" study, U.S., July 2012

Q11: Which of the following social networking sites (like Facebook, Google+, MySpace, etc.) do you use or are you currently a member of?

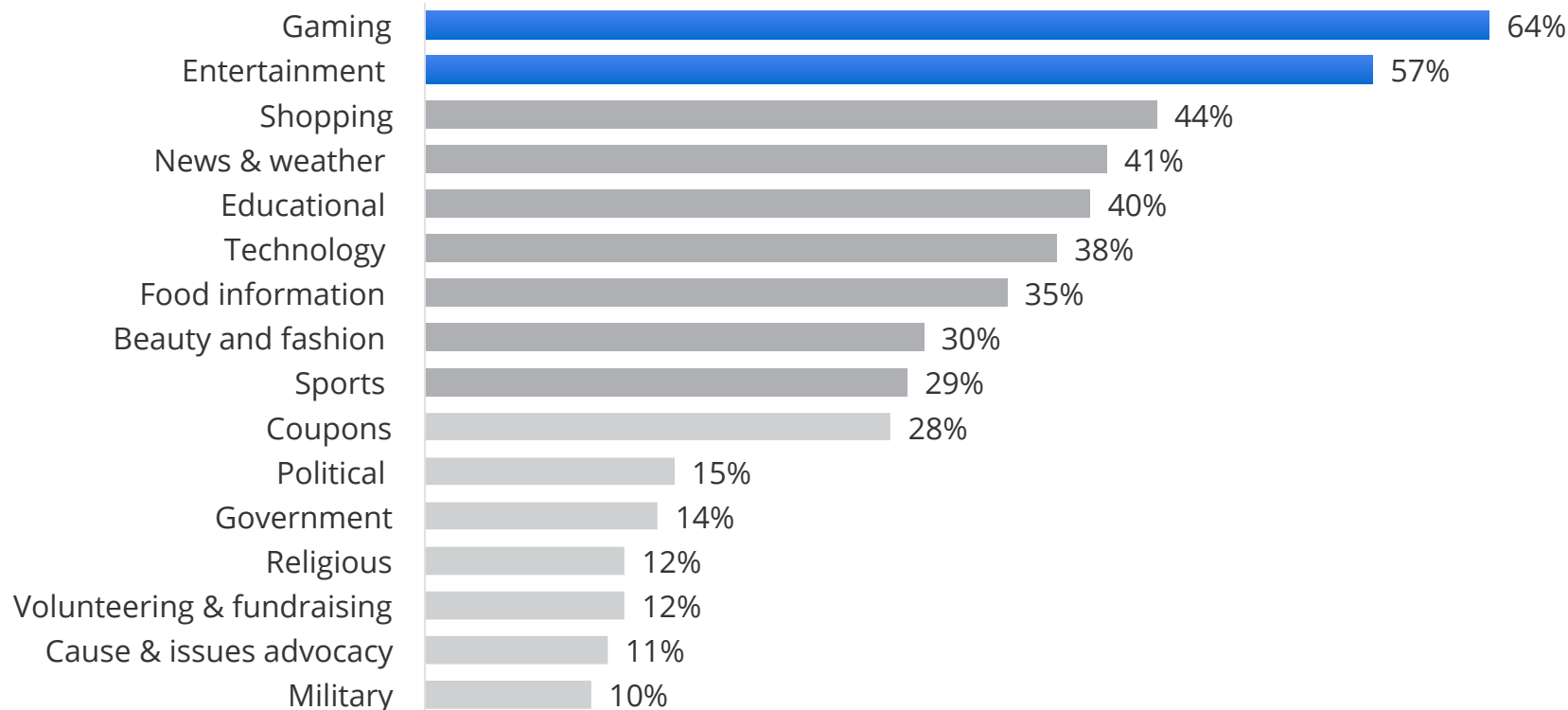
*indicates significant difference at 95% confidence level.

Base: Social Networking Users

Gaming and entertainment content is accessed more broadly than other types of information

Information accessed online – past month

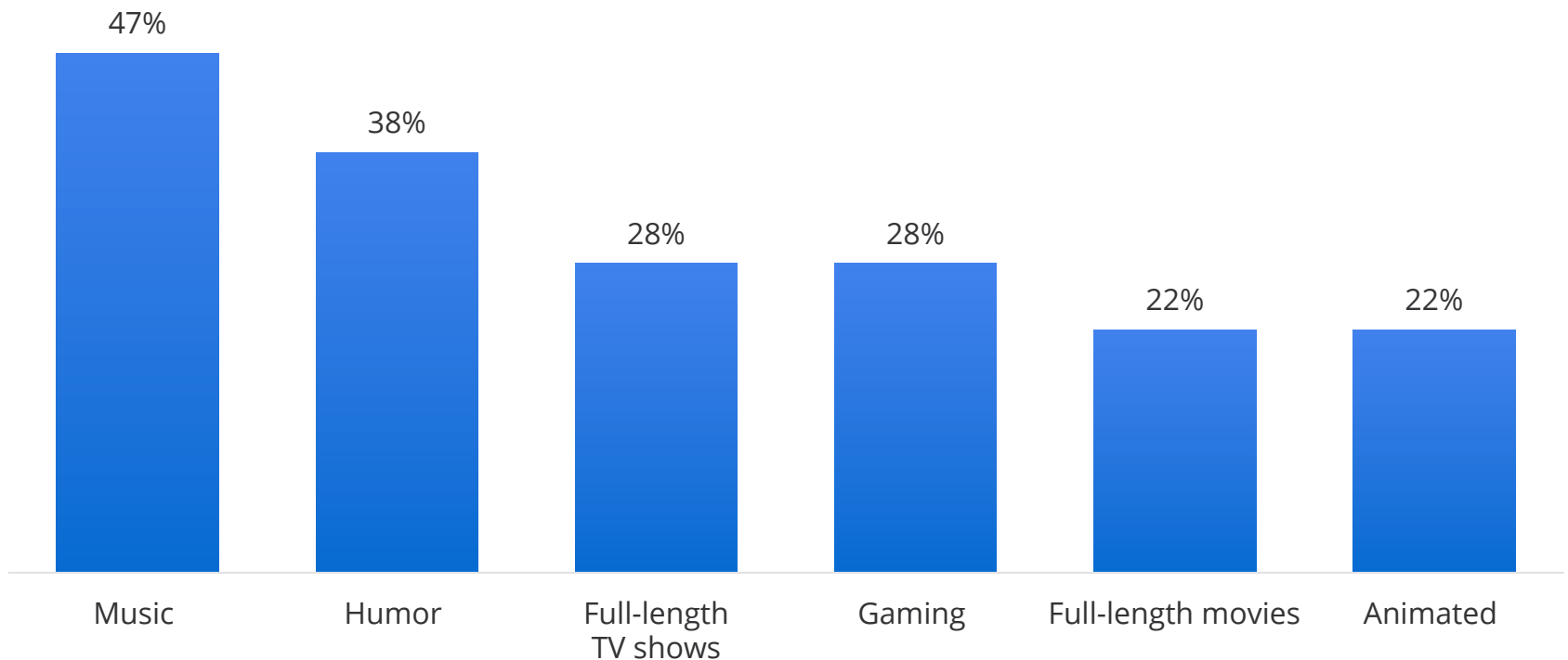
Teens / young adults (n=6,005)



Music, humor, TV shows / movies, and gaming are the most preferred video types watched

Types of video like to watch (top choices)

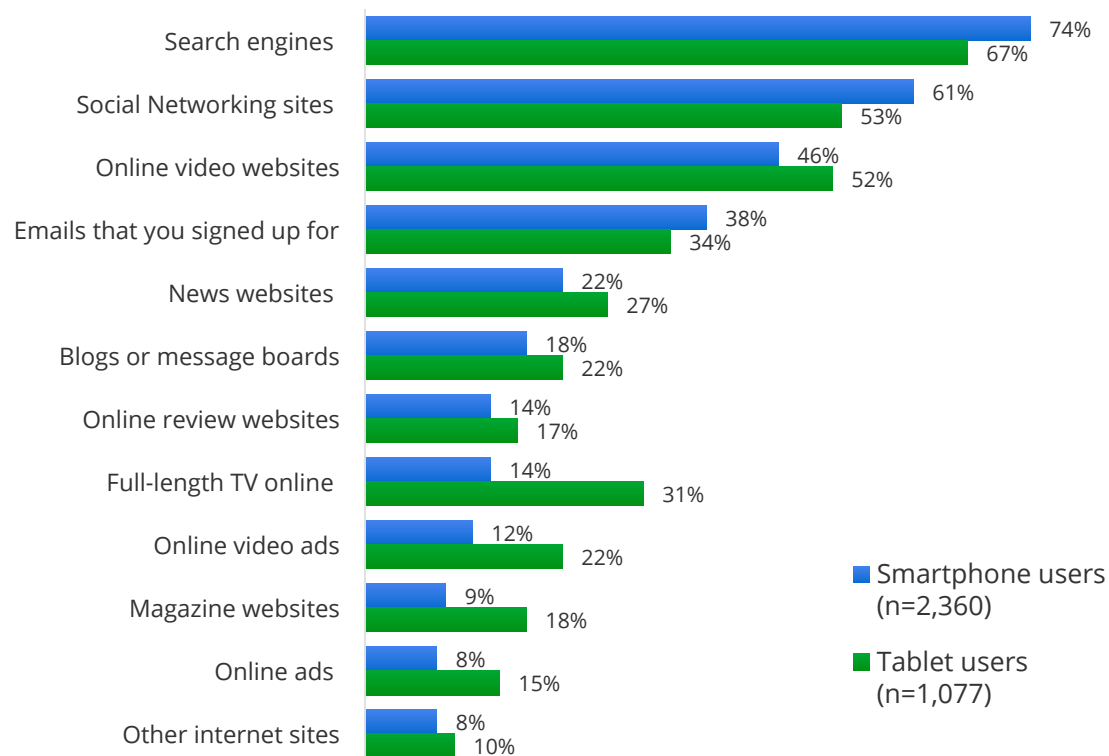
Teens / young adults (n=5,152)



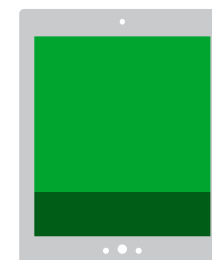
Access to online resources and content is often occurring on mobile platforms

Online sources used to gather info on mobile

Teens/Young adult smart phone users v. tablet users



45%
use a smartphone



21%
use a tablet

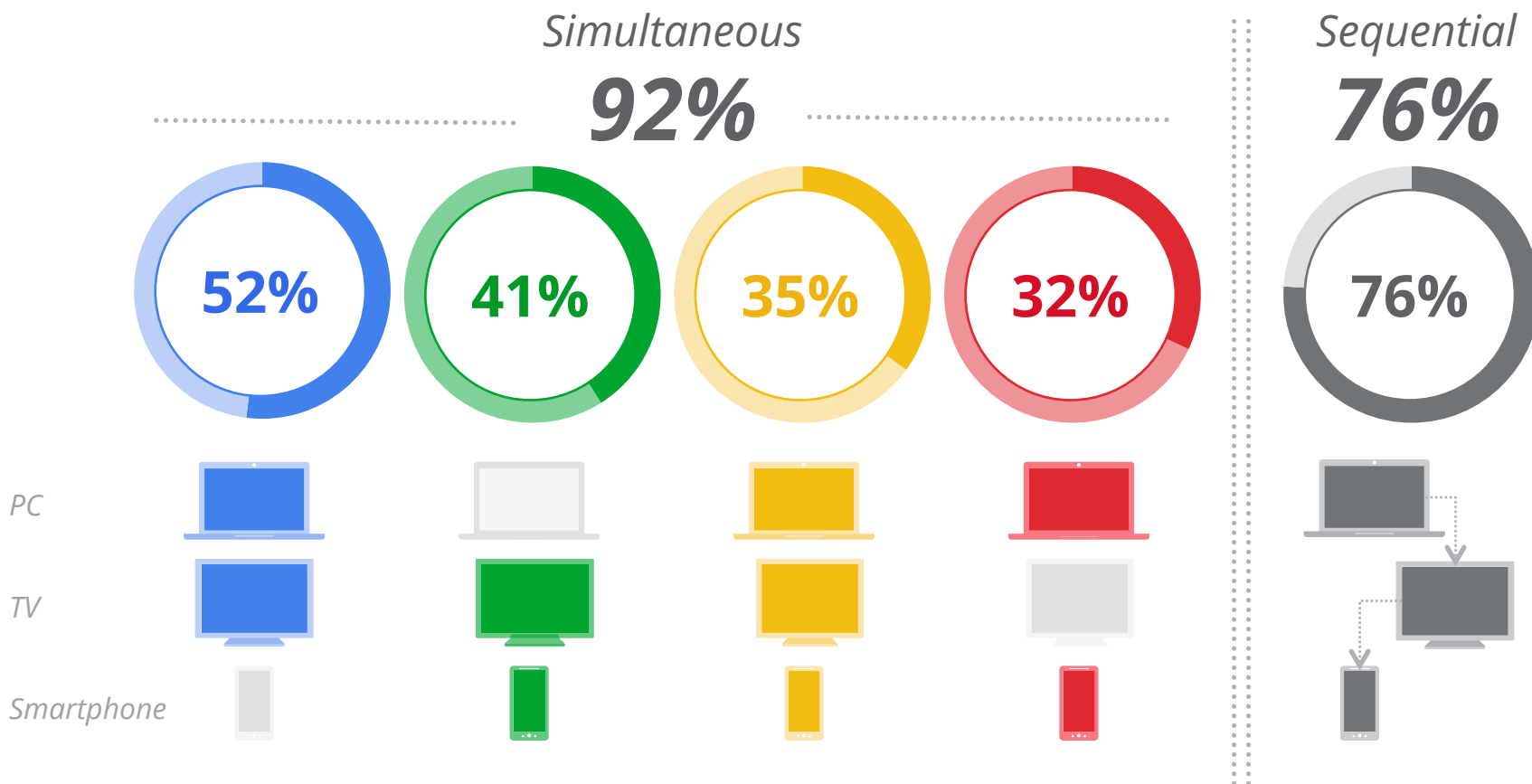
Source: Google/Ipsos Media CT, "2012 Teens & Young Adults" study, U.S., July 2012

Q18: Which of the following types of mobile devices, if any, do you use regularly? Select all that apply.

Q21: Which, if any, of the online sources have you used on your device to gather information on topics that interest you or that you want to learn more about?

Base: Teens/Young Adults Who Gather information online using mobile device

...and while engaging with other screens simultaneously and sequentially



Source: Google/Ipsos Media CT, "2012 Teens & Young Adults" study, U.S., July 2012

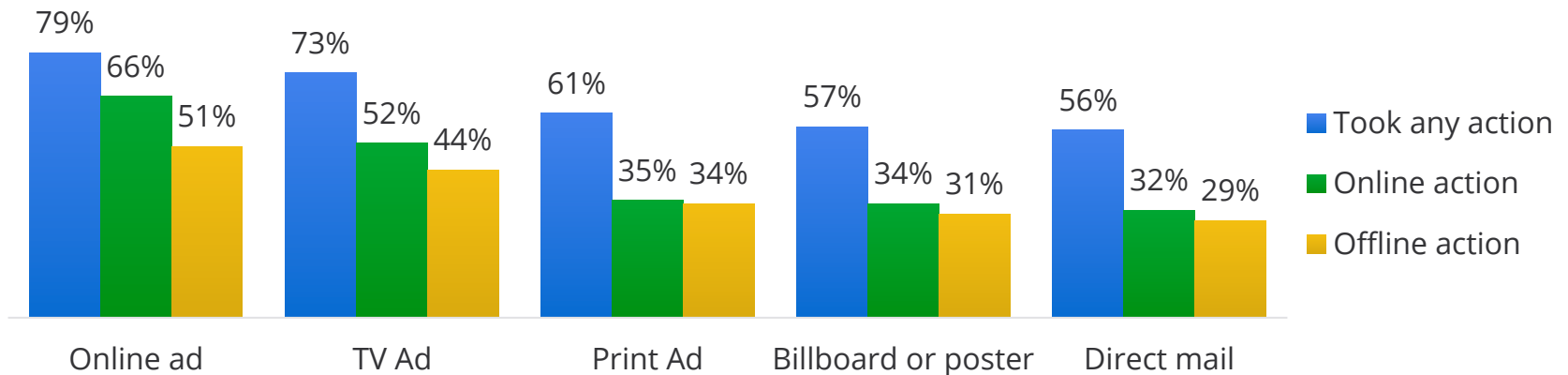
Q22: Do you ever use more than one device at the same time (i.e. watching TV while using your PC or laptop)?

Q23: Do you ever look for information on one device and continue on another? For example, you might be looking for information on your mobile device, but then go on your PC to examine further, or vice versa.

Base: Smartphone and Tablet Users

Online advertising results in greater action than all other advertising

Actions taken by teens/young adults as a result of advertising (NET)



Online actions

- Used a search engine to find out more
- Visited a specific website
- Visited an online video site
- Visited a social networking site

Offline actions

- Talked to others about something I learned from searching
- Looked for more information offline
- Called or contacted a business, store, or organization

Actions taken as a result of seeing/hearing advertisements vs. non-teens

Billboard / poster have the strongest impact on teens and young adults as it prompts them to take action online or offline and make a purchase

	Online ad		TV ad		Print ad		Billboard or poster		Direct mail	
	Teens	Gen pop	Teens	Gen pop	Teens	Gen pop	Teens	Gen pop	Teens	Gen pop
<i>Base total</i>	6,005	1,000	6,005	1,000	6,005	1,000	6,005	1,000	6,005	1,000
Any - NET	79%	70%	73%	68%	61%	59%	57%	40%	56%	54%
Online - NET	66%	61%	52%	53%	35%	39%	34%	27%	32%	33%
<i>Used a search engine to find more information</i>	44%	45%	30%	36%	18%	25%	17%	15%	15%	18%
<i>Visited a specific website</i>	44%	45%	29%	34%	16%	25%	14%	14%	14%	20%
<i>Visited an online video website</i>	43%	36%	24%	17%	11%	9%	12%	8%	11%	8%
<i>Visited a social networking site</i>	42%	33%	19%	15%	11%	11%	12%	8%	12%	9%
Offline - NET	51%	48%	44%	43%	34%	36%	31%	22%	29%	31%
<i>Talked to others about something I learned from searching</i>	38%	35%	26%	27%	15%	18%	15%	11%	14%	14%
<i>Looked for more information offline</i>	26%	23%	21%	22%	17%	19%	15%	10%	13%	12%
<i>Called or contacted a business, store, or organization</i>	26%	26%	20%	20%	16%	19%	14%	10%	15%	20%
Made a purchase	36%	38%	27%	33%	18%	27%	13%	10%	14%	22%
Other	22%	12%	17%	9%	14%	8%	14%	7%	14%	8%
Have not taken any action	21%	30%	27%	32%	39%	41%	43%	60%	44%	46%

Source: Google/Ipsos Media CT, "2012 Teens & Young Adults" study, U.S., July 2012

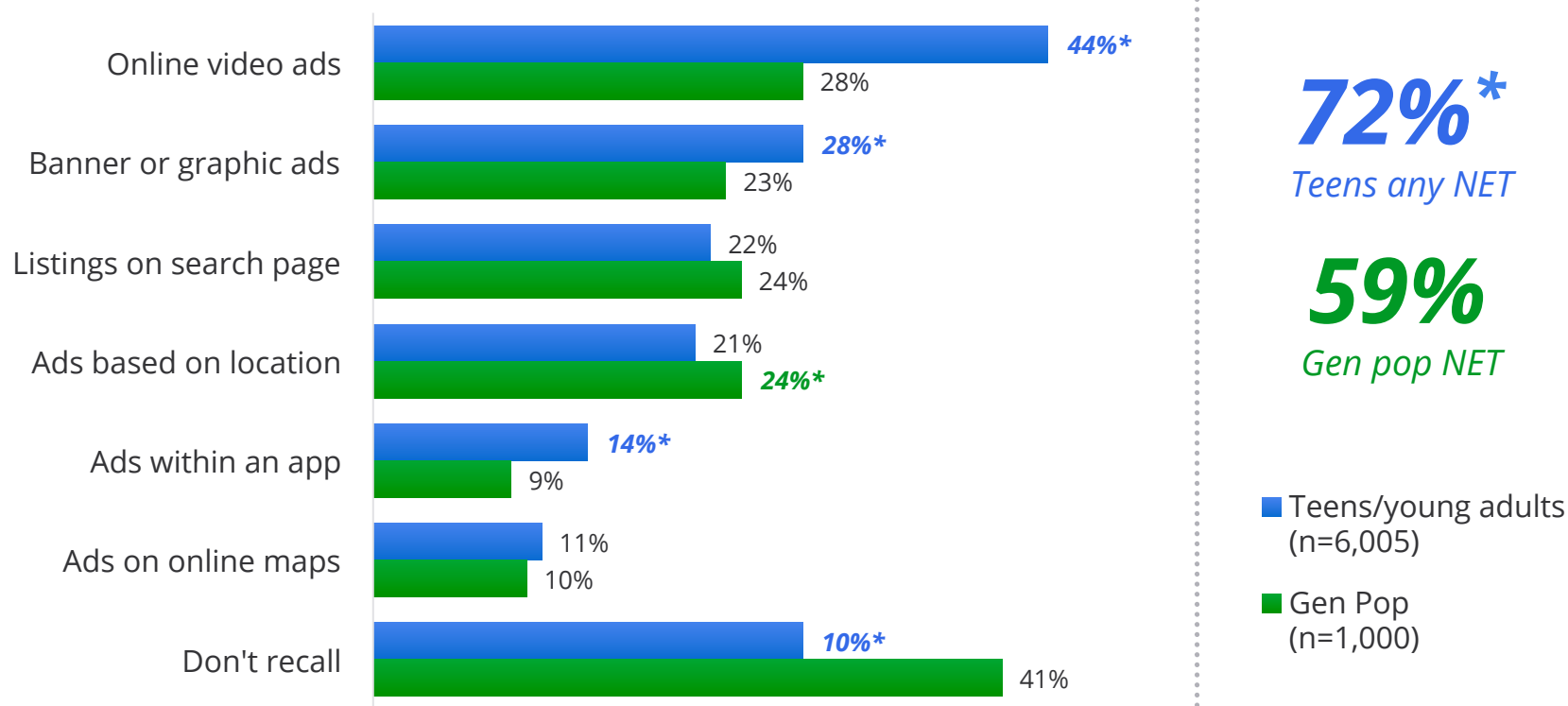
A1: Which of the following actions, if any, have you taken as a result of seeing or hearing the following formats of advertisements?

Base: All Teens/Young Adults. N=6,005

Types of advertising engage with

72% of teens and young adults recall engaging with online ads (vs. 59% for the general population). Online video ads, banner or graphical ads, and ads embedded within apps are particularly effective.

Teens / young adults v. Gen pop



Source: Google/Ipsos Media CT, "2012 Teens & Young Adults" study, U.S., July 2012

A3 Please think about online advertising that you may have seen in the past couple of months. Which of the following types of advertising have you engaged with?

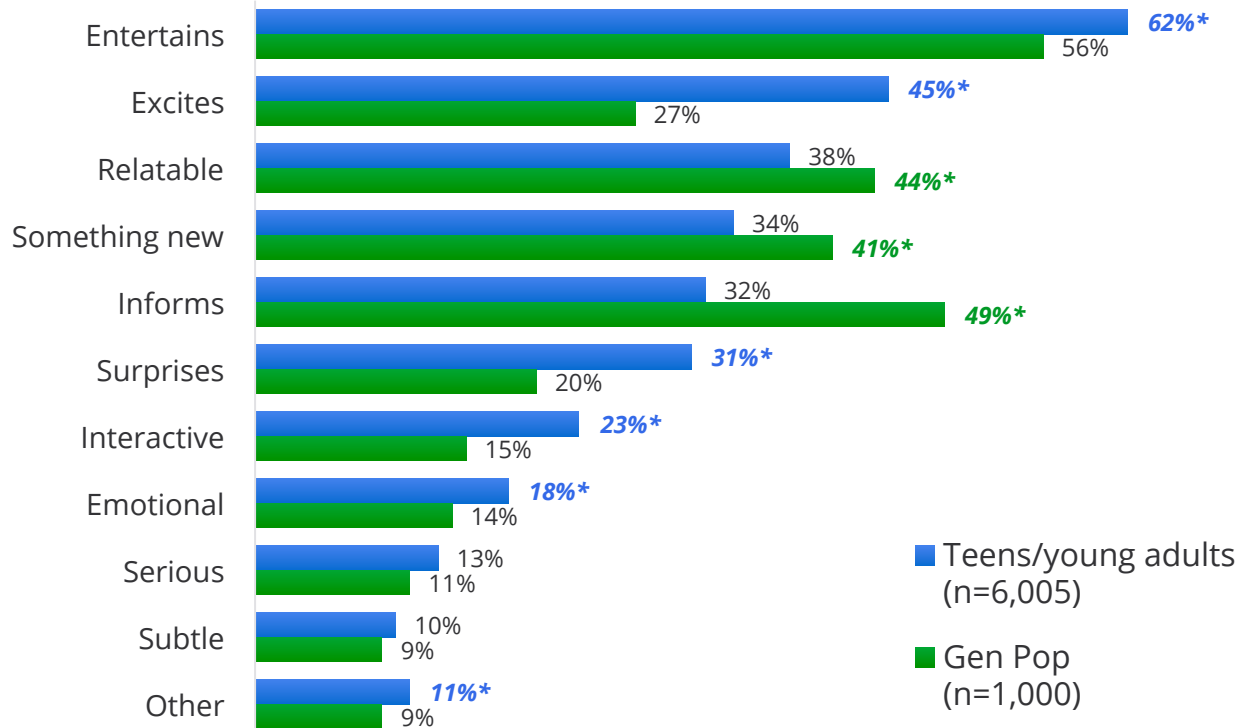
*Indicates significant difference at 95% confidence level.

Base: Total

Most appealing type of advertising

Entertaining, exciting, surprising and interactive are types of advertising more appealing to teens and young adults than the general population

Teens / young adults v. Gen pop



62%*
Entertains

45%*
Excites

31%*
Surprises

23%*
Interactive

Source: Google/Ipsos Media CT, "2012 Teens & Young Adults" study, U.S., July 2012

A2: In general, what type of advertising appeals to you most? Select all that apply.

*Indicates significant difference at 95% confidence level.

A2: In general, what type of advertising appeals to you most? Select all that apply.

Base: Total

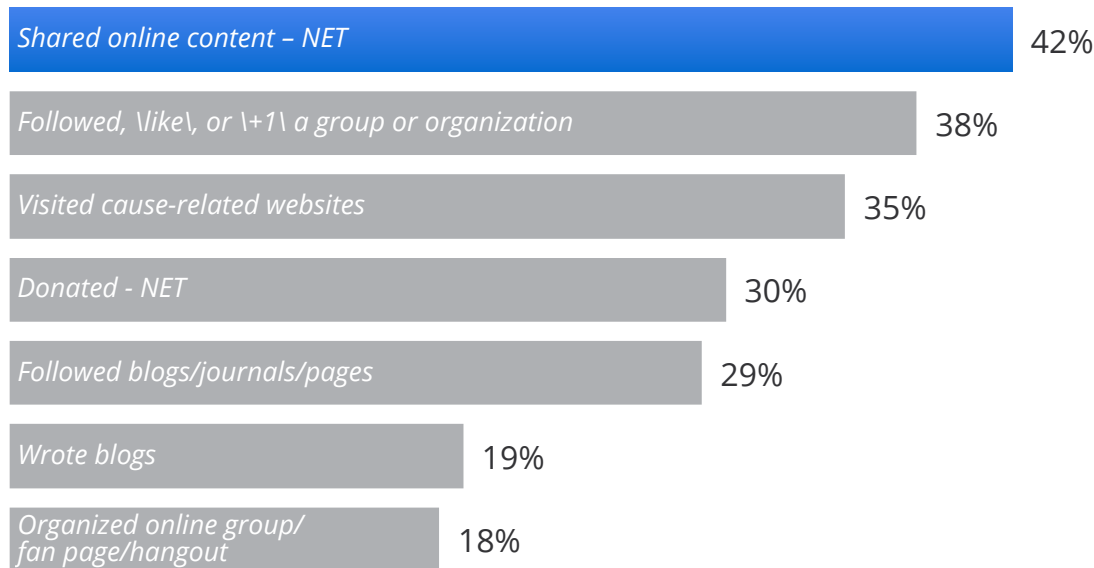
Many teens and young adults are already involved in a cause or movement

Activities done to support a cause



78%

of teens/young adults currently involved in a cause (range) took action online*



56%

Are currently involved in a cause or movement

Top 10 causes involved in:

Anti-bullying	22%
Gay rights	16%
Animal rights/Pet adoption	15%
Youth/Education	14%
Anti-drug	12%
Peace	12%
Anti-smoking	12%
Hunger/Homelessness	10%
Environment/Conservation	9%
Anti-alcohol/drunk driving	9%

Source: Google/Ipsos Media CT, "2012 Teens & Young Adults" study, U.S., July 2012

*Base: Teens/Young Adults currently involved in a cause (range) (219-1,324)

P1: Are you currently involved in any of the following type(s) of causes or movements?

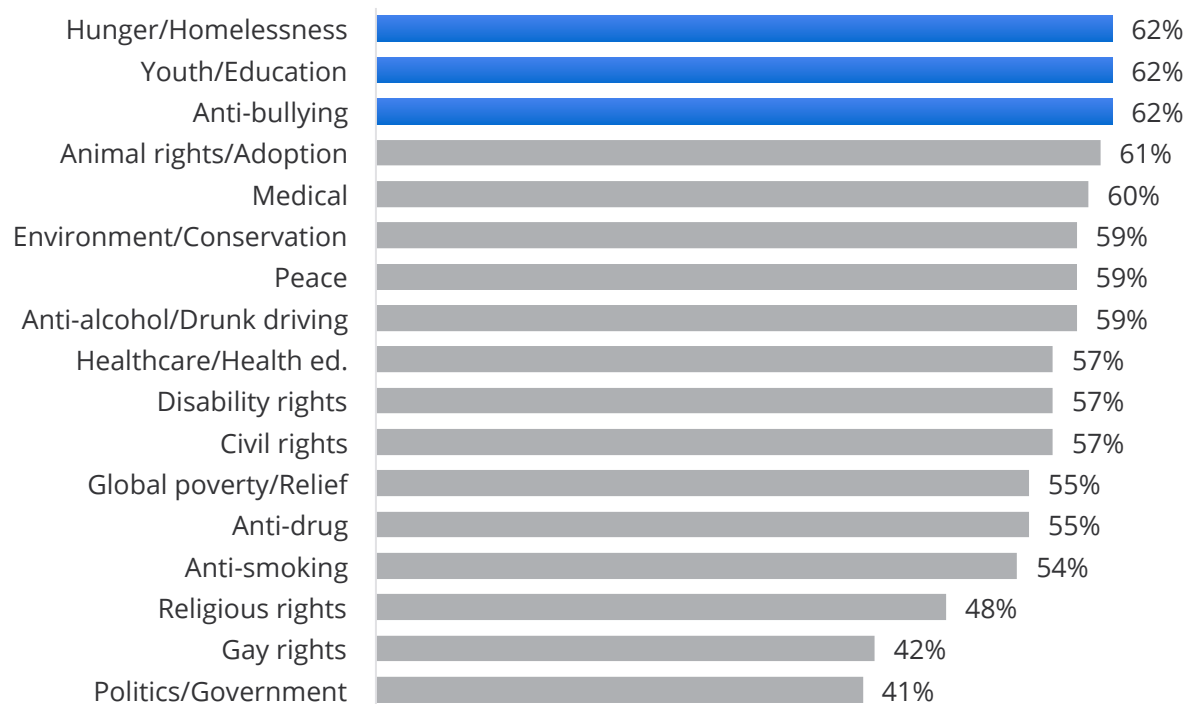
P3: You mentioned being involved in the following cause(s). What types of activities have you participated in for the cause(s) listed below?

Base: Total. N=6,005

Interest in becoming involved in a cause or organization is notable

How interested are teens/young adults in getting involved?

Teens/ young adults (n=range 4,681-5,786)



Source: Google/Ipsos Media CT, "2012 Teens & Young Adults" study, U.S., July 2012

P2: How interested are you in getting involved in each of the following types of causes or movements in the future?

P9: How interested are you in joining any branch of the US military now or in the future?

Those who answered extremely/very/somewhat interested. Base: Not Currently Involved