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

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)

- **Internet**: 82%
- **Friends**: 68%
- **My parents**: 54%
- **Other family or relative**: 37%
- **My siblings**: 38%
- **Television**: 61%
- **Radio**: 38%
- **Magazines/Newspapers**: 37%
- **In-Store Displays**: 26%
- **Direct mail solicitation**: 13%
- **None of these**: 7%

**Time spent online in an average week**: 7.5hrs

**Time spent watching TV in an average week**: 15hrs

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)

<table>
<thead>
<tr>
<th>Source</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Television</td>
<td>71%</td>
</tr>
<tr>
<td>Friends</td>
<td>70%</td>
</tr>
<tr>
<td>My parents</td>
<td>60%</td>
</tr>
<tr>
<td>My siblings</td>
<td>60%</td>
</tr>
<tr>
<td>Radio</td>
<td>60%</td>
</tr>
<tr>
<td>Magazines/Newspapers</td>
<td>52%</td>
</tr>
<tr>
<td>Other family or relative</td>
<td>50%</td>
</tr>
<tr>
<td>Direct mail solicitation</td>
<td>49%</td>
</tr>
<tr>
<td>In-Store Displays</td>
<td>45%</td>
</tr>
</tbody>
</table>

Source: Google/Ipsos Media CT, “2012 Teens & Young Adults” study, U.S., July 2012
Q7: How often, if ever, do you see or hear about a topic that interests you from the following sources and then search for information online? Select one for each.
Base: Use Source To Gather Info
Watching video tops the list; search and social networking are key alongside games and music

Top 5 activities done online

<table>
<thead>
<tr>
<th>Rank</th>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1</td>
<td>Watch video</td>
<td>82%</td>
</tr>
<tr>
<td>#2</td>
<td>Play games</td>
<td>76%</td>
</tr>
<tr>
<td>#3</td>
<td>Use a search engine*</td>
<td>74%</td>
</tr>
<tr>
<td>#4</td>
<td>Visit social network sites</td>
<td>73%</td>
</tr>
<tr>
<td>#5</td>
<td>Listen to music or podcasts</td>
<td>70%</td>
</tr>
</tbody>
</table>

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)

<table>
<thead>
<tr>
<th>Website</th>
<th>Usage (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>YouTube</td>
<td>93%</td>
</tr>
<tr>
<td>Facebook</td>
<td>51%</td>
</tr>
<tr>
<td>Netflix</td>
<td>38%</td>
</tr>
<tr>
<td>Hulu</td>
<td>35%</td>
</tr>
<tr>
<td>Vevo</td>
<td>17%</td>
</tr>
<tr>
<td>Yahoo! Video</td>
<td>16%</td>
</tr>
<tr>
<td>MSN</td>
<td>7%</td>
</tr>
<tr>
<td>MySpace</td>
<td>6%</td>
</tr>
<tr>
<td>Vimeo</td>
<td>6%</td>
</tr>
<tr>
<td>AOL</td>
<td>6%</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
</tr>
</tbody>
</table>

**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
- Visited an online video website: 43%
- Visited a social networking site: 43%
- Talked to others about something I learned from a search: 38%
- Visited a retailer/store: 25%
- Shared search results with others: 23%
- Looked for more information offline: 20%

91% of online video users have taken action as a result of online video
- Looked for related online videos: 37%
- Rated a video: 31%
- Posted a comment on the video: 30%
- Subscribed to a video channel: 28%
- Used a search for more info on a topic featured in the video: 27%
- Forwarded a link or video to someone: 27%

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+

- **39%***
  - Teens (n=4,607)
- **30%***
  - Gen Pop (n=726)

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)

- Gaming: 64%
- Entertainment: 57%
- Shopping: 44%
- News & weather: 41%
- Educational: 40%
- Technology: 38%
- Food information: 35%
- Beauty and fashion: 30%
- Sports: 29%
- Coupons: 28%
- Political: 15%
- Government: 14%
- Religious: 12%
- Volunteering & fundraising: 12%
- Cause & issues advocacy: 11%
- Military: 10%

Source: Google/Ipsos Media CT, “2012 Teens & Young Adults” study, U.S., July 2012
Q5: Which of the following type(s) of information have you accessed online in the past month? Select all that apply.
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)

<table>
<thead>
<tr>
<th>Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Music</td>
<td>47%</td>
</tr>
<tr>
<td>Humor</td>
<td>38%</td>
</tr>
<tr>
<td>Full-length TV shows</td>
<td>28%</td>
</tr>
<tr>
<td>Gaming</td>
<td>28%</td>
</tr>
<tr>
<td>Full-length movies</td>
<td>22%</td>
</tr>
<tr>
<td>Animated</td>
<td>22%</td>
</tr>
</tbody>
</table>

Source: Google/Ipsos Media CT, “2012 Teens & Young Adults” study, U.S., July 2012
Q14: Which of the following kinds of online videos (including all online content such as videos, shows, movies, etc.) do you like to watch?
Base: Online Video Users
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

<table>
<thead>
<tr>
<th>Source</th>
<th>Smartphone Users (n=2,360)</th>
<th>Tablet Users (n=1,077)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search engines</td>
<td>74%</td>
<td>67%</td>
</tr>
<tr>
<td>Social Networking sites</td>
<td>61%</td>
<td>53%</td>
</tr>
<tr>
<td>Online video websites</td>
<td>46%</td>
<td>52%</td>
</tr>
<tr>
<td>Emails that you signed up for</td>
<td>34%</td>
<td>38%</td>
</tr>
<tr>
<td>News websites</td>
<td>27%</td>
<td>22%</td>
</tr>
<tr>
<td>Blogs or message boards</td>
<td>22%</td>
<td>18%</td>
</tr>
<tr>
<td>Online review websites</td>
<td>17%</td>
<td>14%</td>
</tr>
<tr>
<td>Full-length TV online</td>
<td>31%</td>
<td>14%</td>
</tr>
<tr>
<td>Online video ads</td>
<td>22%</td>
<td>12%</td>
</tr>
<tr>
<td>Magazine websites</td>
<td>18%</td>
<td>9%</td>
</tr>
<tr>
<td>Online ads</td>
<td>15%</td>
<td>8%</td>
</tr>
<tr>
<td>Other internet sites</td>
<td>10%</td>
<td>8%</td>
</tr>
</tbody>
</table>

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

Simultaneous

<table>
<thead>
<tr>
<th>Device</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>PC</td>
<td>52%</td>
</tr>
<tr>
<td>TV</td>
<td>41%</td>
</tr>
<tr>
<td>Smartphone</td>
<td>35%</td>
</tr>
<tr>
<td>Sequential</td>
<td>32%</td>
</tr>
</tbody>
</table>

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

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? Green highlight indicates significant difference at 95% confidence level.
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

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

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.

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.

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

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

- **Entertains**: 62%*
- **Excites**: 45%*
- **Relatable**: 44%*
- **Something new**: 41%*
- **Informs**: 49%
- **Surprises**: 31%*
- **Interactive**: 23%*
- **Emotional**: 18%*
- **Serious**: 13%*
- **Subtle**: 11%*
- **Other**: 9%*

*Indicates significant difference at 95% confidence level.

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

- 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
**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)

- Hunger/ Homelessness: 62%
- Youth/Education: 62%
- Anti-bullying: 62%
- Animal rights/ Adoption: 61%
- Medical: 60%
- Environment/ Conservation: 59%
- Peace: 59%
- Anti-alcohol/Drunk driving: 59%
- Healthcare/ Health ed.: 57%
- Disability rights: 57%
- Civil rights: 57%
- Global poverty/ Relief: 55%
- Anti-drug: 55%
- Anti-smoking: 54%
- Religious rights: 48%
- Gay rights: 42%
- Politics/ Government: 41%

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