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Consumer Intelligence Series

Media-savvy kids, teens want engaging stories on multiple devices

Through PwC's ongoing Consumer Intelligence series, we gain directional insights on consumer attitudes and behaviors in the rapidly changing media and technology landscape.

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Series overview & study objectives

Through PwC's ongoing *Consumer Intelligence Series*, we gain directional insights on consumer attitudes and behaviors in the rapidly changing media and technology landscape. This report summarizes key findings from a 511-respondent survey[1] conducted in May–June 2015. The goal of this research was to study what kinds of media content appeal to kids and teens.

Specific objectives were to explore:

- How kids and teens engage with specific content genres.
- How much media they consume weekly and on what devices.
- How much they influence their parents on media consumption decisions.
- How they learn about new content.
- Their awareness levels of entertainment and media brands and manufacturers.

What grabs kids and teens?

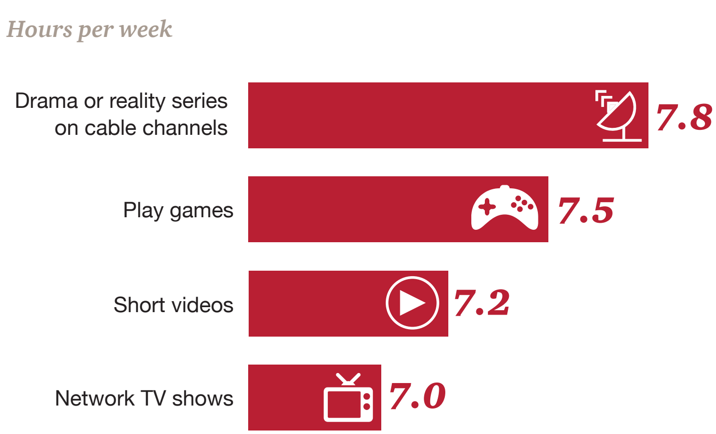
A new idea, an engaging storyline, great characters, interactivity on multiple devices.

[1] Demographics—51% female, 49% male
31% of sample: 8-11 years old
33% of sample: 12-14 years old
36% of sample: 15-18 years old

Key findings

1. ***Kids and teens spend a lot of time consuming media content.****
    - On average across age groups, they say they spend 15.5 hours per week.
    - However, 45% of kids/teens report 16-20+ hours per week
        - driven by both 12-14 year olds (52%) and 15-18 year olds (52%)
2. ***As kids age, their media engagement increases.***
    - Teens 15-18 spend 3 more hours weekly watching media than kids 8-11, who spend the least amount of weekly time engaging with media content.
    - 34% of kids 8-11 spend between 6-10 hours

What do kids watch every week?

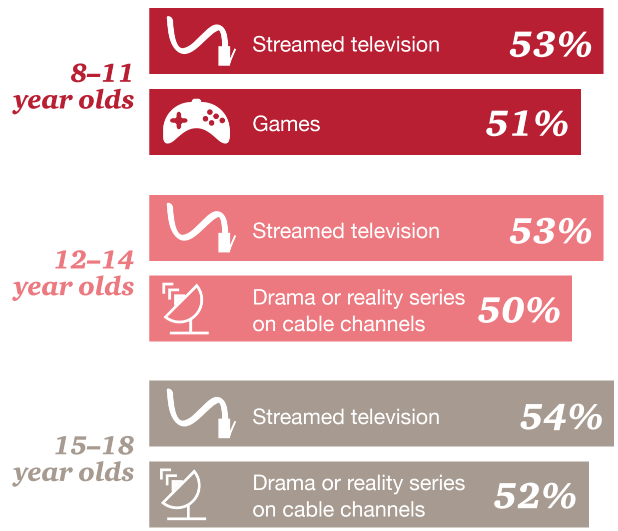


Base: Total Respondents (511): Q6a. Thinking about the past three month period, how often, in an average week, did you typically engage in each of the following activities?

See Appendix (page 15) for more.

**Reported consumption may vary from other studies, given consumers may not accurately report their actual viewing times.*

Streaming wins!

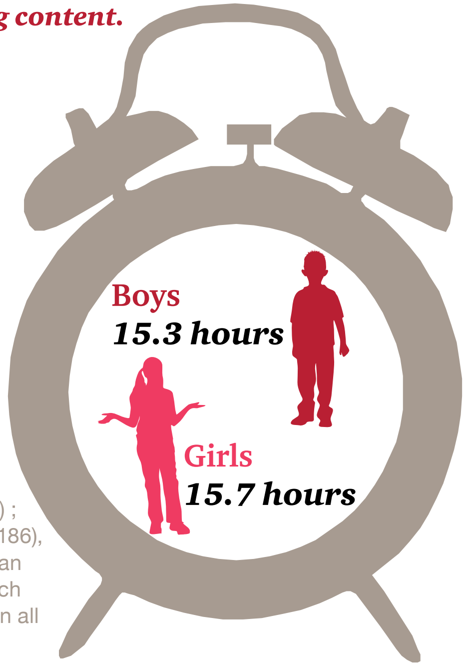


Base: Total 8-11 (158), 12-14 (167), 15-18 (186); Q7. What are your favorite types of programming/content?

See Appendix (page 12) for more.

3. *Boys and girls spend similar amounts of time consuming content.*

- Boys (15.3 hours)
- Girls (15.7 hours)



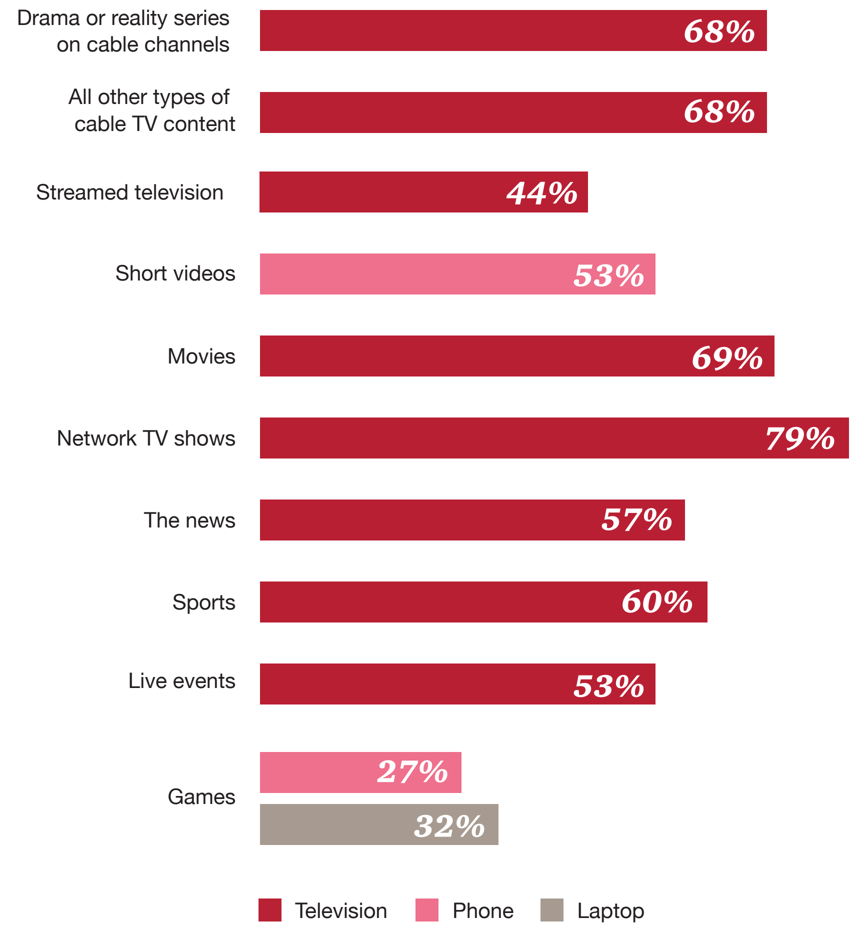
Base: Total Respondents (511) ; 8-11 (158), 12-14 (167), 15-18 (186), Girls (262), Boys (249); Q5. In an average week, about how much time do you spend engaging in all forms of media content?*

See Appendix (page 14) for more.

4. *Kids 8-18 years old engage most in: watching live network television, playing video games on a console, viewing videos on YouTube, and watching subscription TV channels.*

- They spend between 7-8 hours per week on each of these content types.
- Despite a healthy 60% showing, the least watched content is sports (4.2 hours) and academic or environmental shows/movies (4.6 hours). See Appendix (page 17) for more.

Give me my TV!



Base: Ranked 1st, 2nd, or 3rd; Q7. Then check the method that you typically engage in most often.

See Appendix (page 13) for more.

5. *Interestingly, kids and teens seem to highly underestimate their hours of weekly media engagement in the absolute—or overestimate their time spent on specific content genres.*

- When asked about time spent on specific content categories and genre, hours are greatly inflated relative to the amount of time they perceive they spend in the absolute.

6. *Traditional TVs and laptops/computers are the most widely used for watching media—contrary to the widely held perception that kids spend the bulk of their time consuming content on mobile devices.*

- Older teens favor laptops/computers over traditional TV (this aligns with a recent Acumen Report survey among the 13-24 age group, which shows a preference for digital content consumption).
- Younger kids 8-11 prefer traditional TV over laptops/computers.
- As kids age, they migrate from viewing content on their tablets to using their cell phones more frequently.

7. *The most popular media content is streamed TV from subscription/cable channels.*

- What follows varies by age; younger kids 8-11 prefer games next, while 12-18 year-olds favor watching drama/reality shows on cable TV.
- TV is the most preferred format for viewing all content explored—except short videos or playing games (laptops).

8. *Today's content is generally regarded (60%) as a good combination of trusted favorites and new shows.*

- A little more than one-third (33%) of respondents consider current programming to be innovative
- Only 9% regard today's content negatively—being more of the same old stuff.

Top three favorite types of content

Ranked 1st, 2nd or 3rd

Base: Total Respondents (511); Q7. What are your favorite types of programming/content?

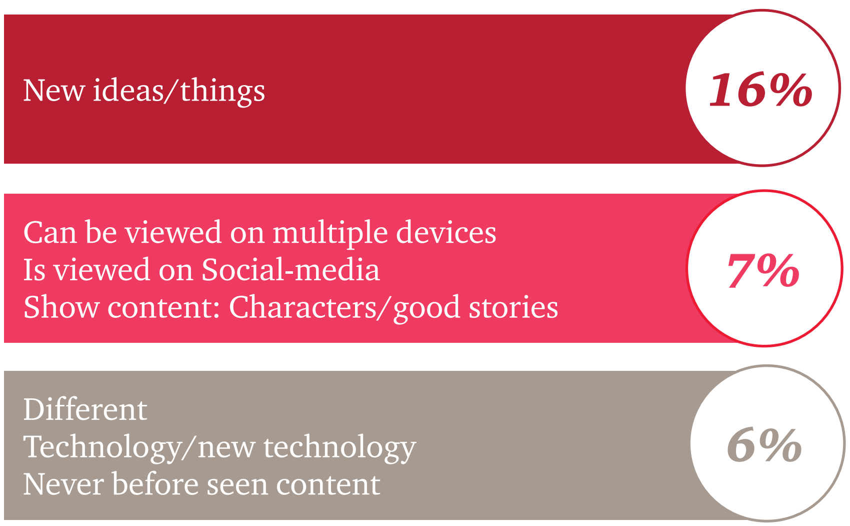
See Appendix (page 12) for more.

9. *Innovative programming is considered to be content that is:*

- a new idea, or
- an engaging storyline with
- great characters
- something never seen before
- which integrates technology and
- can be played/viewed on multiple devices

What is innovative content?

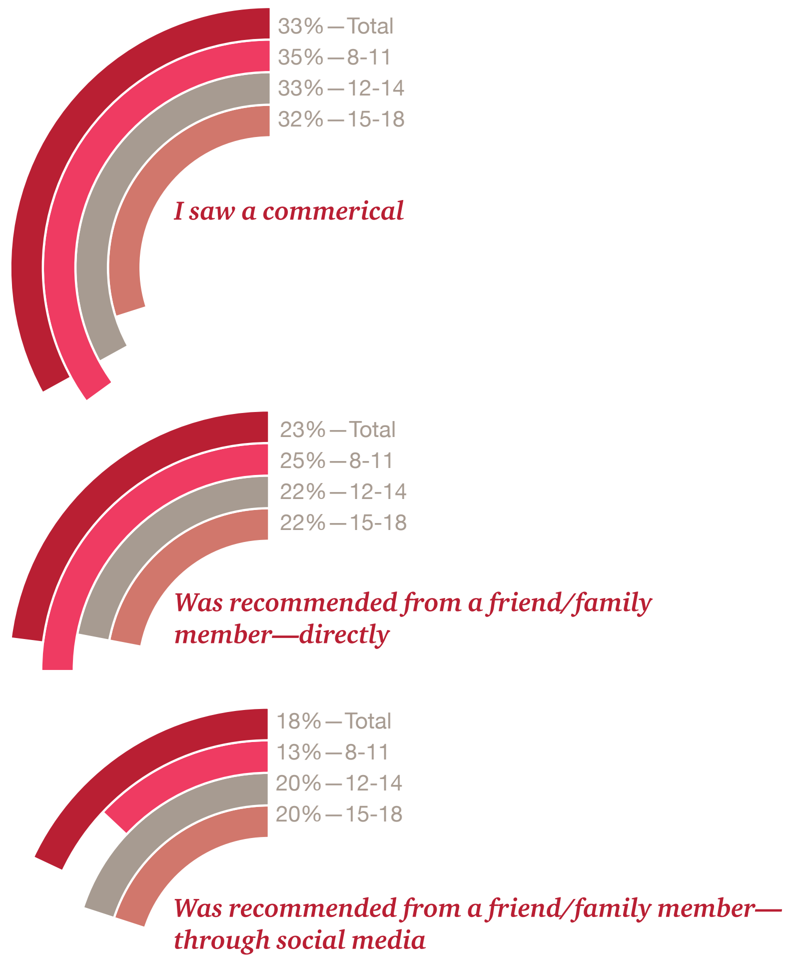
- *Innovative content is a new idea, different approach or something never before seen*
- *Utilizes some form of new technology*
- *Can be viewed on multiple devices*
- *At the basis of innovative content there must also be interesting characters and a good/engaging story*



Base: Total Respondents (511); Q10. In your own words, what do you consider to be innovative content?

10. *Kids and teens learn about new programming mostly through commercials and also by recommendations from family and friends—both word of mouth and online.*

How do kids find new content?



11. *Kids and teens believe they influence their parents about content viewed in the home, but realize that the final decision rests with their parents.*

- 82% believe they are “somewhat” to “very” influential.
- When asked how media content decisions are made, many admit their parents make the decisions.
- Some kids/teens believe parents consider their preferences, but cost and parental opinion wins out.

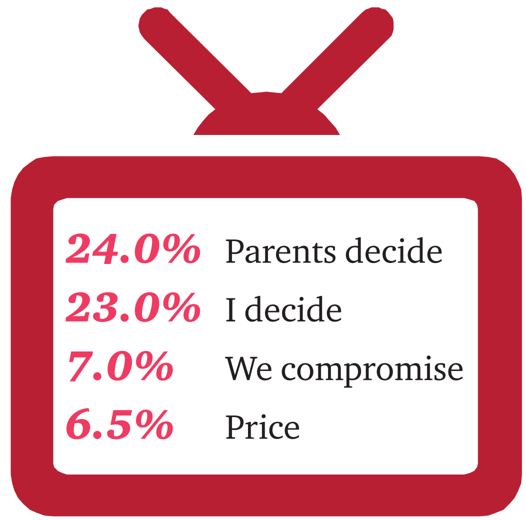
How kids influence parents

Base: Total Respondents (511) ; 8-11 (158), 12-14 (167), 15-18 (186); Q14. How would you describe the degree of influence you believe you have on your parents when it comes to the content that comes into the home?

See Appendix (page 18) for more.

Who decides what kids and teens watch?

Open end response (nets)



- Kids/teens generally believe it’s a split decision whether or not parents influence media content in the home.
- Younger kids 8-11 believe their parents rule the roost
- Older kids 15-18 claim their parents “listen to them” when it comes to making content decisions.

Base: Total Respondents (511) ; 8-11 (158), 12-14 (167), 15-18 (186); Q14. How would you describe the degree of influence you believe you have on your parents when it comes to the content that comes into the home? Please elaborate.

12. *Pirating movies and music from the Internet is not something kids and teens claim to do frequently.*

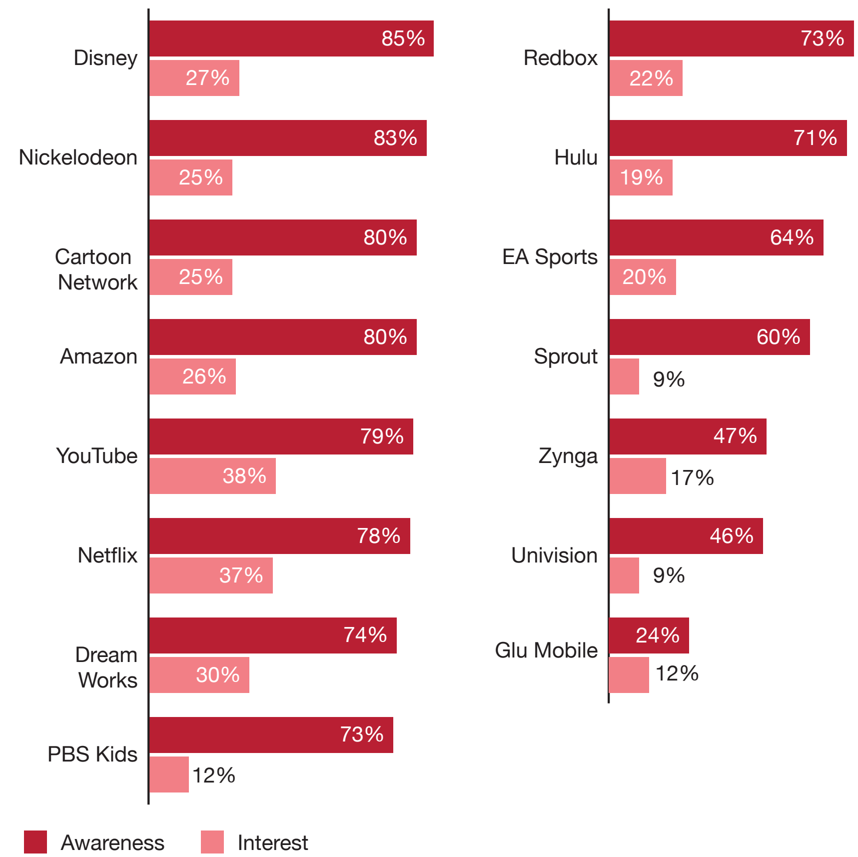
- A little over half (without variance by age group) claim they have downloaded content from the Internet for free on one or two occasions.
- 15% of older teens (15-18) claim to do it fairly often.

13. *Awareness of hardware manufacturers as well as entertainment and social-media brands is fairly high, with a few exceptions:*

- **Hardware:** 80% or more claim awareness of all five computer, mobile phone, and gaming manufacturers listed.
- **Entertainment:** The most well-known brands are Disney, Nickelodeon, Cartoon Network, Amazon, YouTube and Netflix. Younger kids claim less awareness compared to tweens/teens.
- **Social-media:** Most all are familiar with the top social-media sites (e.g. Facebook, Twitter, Instagram, YouTube and Skype). Younger kids (8-11) are less familiar than tween/teens (12-18) with more obscure sites (e.g. Tinder, ooVoo, MeetMe).

What entertainment brands do kids know?

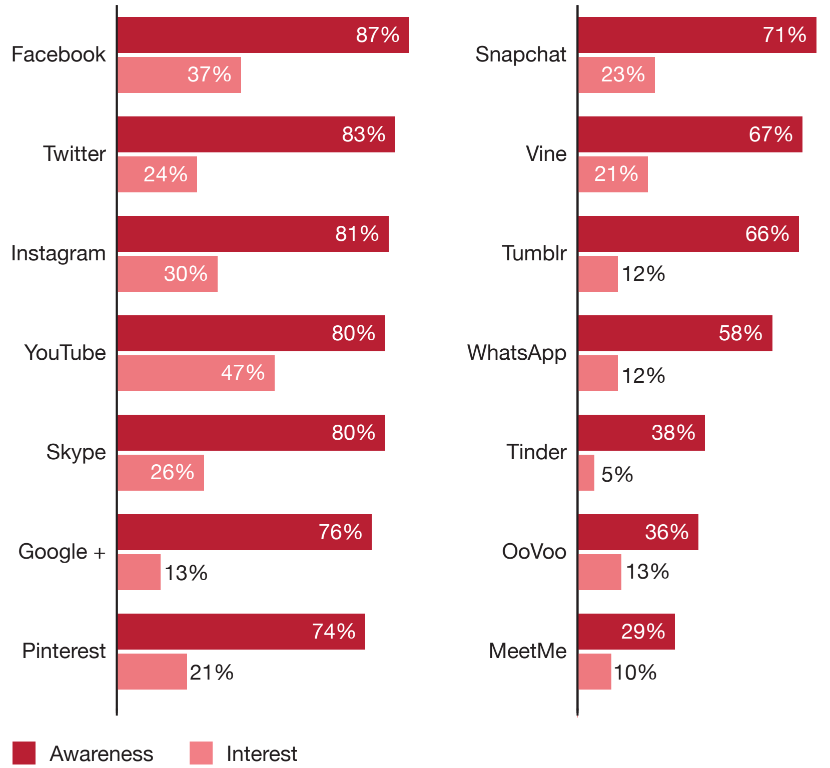
- *Most of the entertainment brands explored are well-known among kids 8-18. Awareness of Zynga and Univision are modest compared to other entertainment names.*
- *Kids are most interested in YouTube's and Netflix's content, followed by DreamWorks.*



Base: Total Respondents (511); Q11 . Please review the following list of entertainment brands. For each one, please indicate if you are aware of this brand and whether or not you are interested in the content they offer.

Kids know their social-media brands

- *The majority of kids 8-18 years old are familiar most social-media sites. Facebook is the most well-known, followed closely by Twitter, Instagram, YouTube, and Skype.*
- *These social-media sites—as well as Snapchat—also generate a relatively high level of interest.*



Base: Total Respondents (511); Q13. Finally, please review the following social-media brands. For each one, please indicate if you are aware of this brand and whether or not you are interested in the content they offer.

Kids are social-media savvy

Facebook is the most well-known, followed closely by Twitter, Instagram, YouTube, and Skype.

14. Brands with the highest levels of awareness are also the ones kids and teens show the greatest interest in.

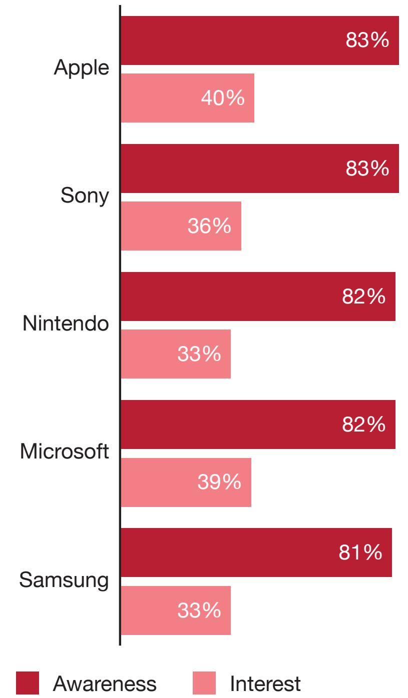
- YouTube, Netflix and DreamWorks offer the entertainment kids/teens seek out the most.
- Younger kids favor entertainment brands that feature animated shows, e.g. Disney, Cartoon Network, and Nickelodeon.
- Teens 12-18 drive interest in most social-media sites, except YouTube, where interest is equally strong across all ages.

15. Awareness for computer, mobile phone, and gaming manufacturers is exceptionally high and interest in their products is strong.

- Eight of out of ten kids/teens have heard of all the manufacturers listed and roughly half of them are interested in the products they make.
- Apple is the best known manufacturer and its products drive the greatest interest.
- Younger kids are more interested in Nintendo products, while 15-18 year-olds care more about the products offered by all the other manufacturers.
- Equal interest in products across all computer, mobile, and gaming brands explored.

The power of brand

- *Awareness is very high for all these computer, mobile phone, and gaming manufacturers with roughly eight out of ten kids claiming to be familiar with these brands (81%-83%).*
- *Interest in these companies is strong compared to other brands explored.*
- *It is highest for Apple and Microsoft and lowest for Nintendo and Samsung. There is just a 7-point difference from the top to lowest interest scores (33%-40%).*



Base: Total Respondents (511); Q12. Please review the following computer/mobile phone/gaming manufacturers. For each one, please indicate if you are aware of this brand and whether or not you are interested in the products they offer.

Key implications

1. ***The 12-18 age group is the bull's-eye for content messages across media types and are likely to be most receptive to digital messaging.***
   - They spend more time in the absolute, increasing time spent as they age; engage more frequently on their laptops; are more aware of a breadth of digital options and brand sites; and believe they have more influence and control over what gets into the home.
   - While kids 8-11 begin to establish media content habits during this age, they are engaging less often, are less aware of entertainment brands and [the more obscure] social-media sites and feel their parents have more influence and control.
   - Younger kids 8-11 engage more often with traditional media formats (e.g. TV) and thus represent a more limited audience

2. ***The popularity of streamed TV shows from cable and subscription channels speaks to the importance for "on-demand" viewing.***
   - "What I want when and where I want it" continues to be the mantra for media consumption—among kids/teens as well as adults.

3. ***A content and messaging opportunity exists to focus on innovative storylines and characters—especially those that are best able to transcend devices.***
   - Innovation is characterized by new ideas, interesting characters, and engaging storylines delivered via new technology onto multiple devices.

4. ***Given the correlation between brand awareness and content interest, as well as engagement across devices (among 12-18 age group), an opportunity exists to drive awareness across less "traditional" media formats (e.g. online, social-media, mobile).***

5. ***Kids and teens are driven by content and genre. Perception is not reality: They are either greatly underestimating total hours of engagement or greatly exaggerating hours of engagement by genre and content type.***
   - Showcase genre type in communication and messaging since it appears to be the key driver of engagement.

6. ***Advertising is effective for communicating new programming.***
   - This (along with personal experience) is also a likely driver of word-of-mouth recommendations from family and friends.

7. ***A dual messaging and awareness strategy is warranted. Parents have the final say—but do respond to kids' influence.***
   - While kids and teens influence content and devices in the home, they know that parents control the purse strings and have ultimate control over content flow and devices.

8. ***No significant threat exists regarding Internet piracy of movies and music.***
   - Although 15% of older teens (aged 15-18) claim to engage in this behavior frequently, their younger counterparts do not. This confirms prior learning among the 18-24 age group, where pirating is more prevalent.

Appendix

Key study demographics: Gender/Age

511 total respondents interviewed

8-11 year olds—31%

12-14 year olds—33%

15-18 year olds—36%

	Total	8-11 year olds	12-14 year olds	15-18 year olds
Base: Total respondents	511	158	167	186
Gender				
Male	49%	47%	52%	47%
Female	51%	53%	48%	53%
Age				
8-11	31%	100%	0%	0%
12-14	33%	0%	100%	0%
15-18	36%	0%	0%	100%
Own internet-accessible cell phone	92%	73%	100%	100%
Length of ownership				
1 year of less	35%	59%	28%	20%
1-2 years	42%	33%	48%	43%
2-3 years	16%	4%	19%	23%
4+ years	7%	4%	5%	14%

Internet-accessible cell phone—length of ownership

Length of ownership	Total	8-11 year olds	12-14 year olds	15-18 year olds
1 year or less	35%	59%	28%	20%
1-2 years	42%	33%	48%	43%
2-3 years	16%	4%	19%	23%
4+ years	7%	4%	5%	14%

Respondent incidence

8-11 year olds: 31%

12-14 year olds: 33%

15-18 year olds: 36%

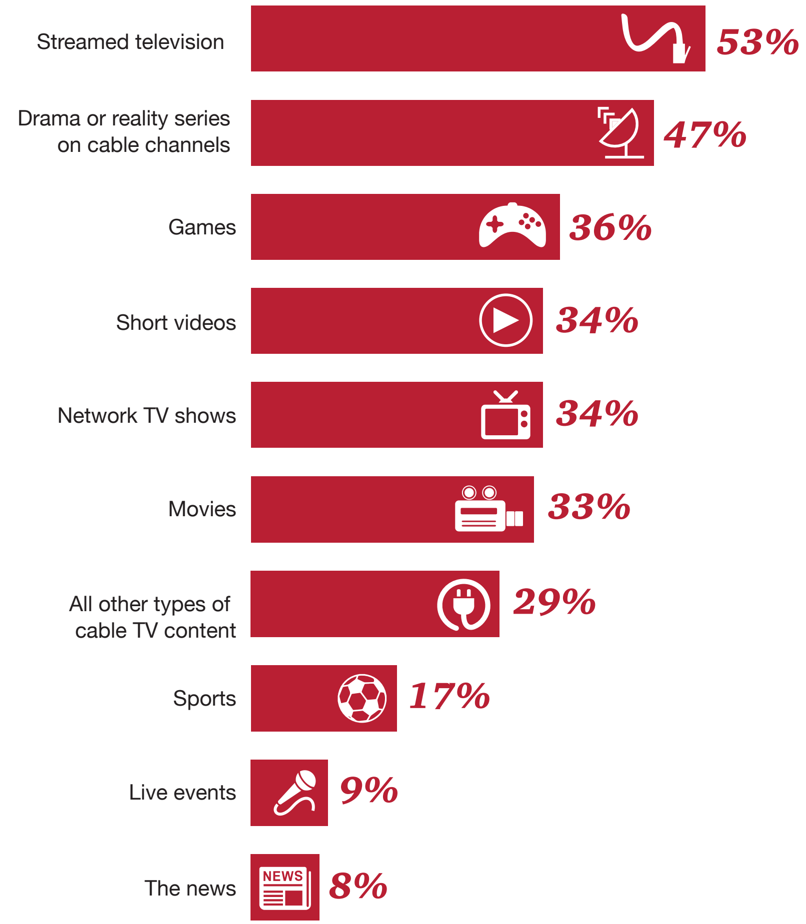
Top three favorite types of content
Ranked 1st, 2nd or 3rd

Content type	8-11 year olds	12-14 year olds	15-18 year olds
Streamed TV	53%	53%	54%
Cable drama/reality series	37%	50%	52%
Video games	51%	33%	26%

Base: Base: Total Respondents (511); Q7. What are your favorite types of programming/content?

Favorite types of content
Ranked 1st, 2nd or 3rd

- *Kids/Teens largely prefer watching streamed TV or drama/reality shows on cable TV channels.*
- *This is followed in preference by short videos, network TV shows and movies.*
- *News and live events are least preferred.*



Base: Total Respondents (511); Q7. What are your favorite types of programming/content?

Favorite type of content—by age

- *Watching streamed TV is the top activity by kids of all ages.*
- *After viewing streaming television, younger children 8-11 years old favor playing games, while their older counterparts, teens 12-18 years old, prefer to watch dramas/reality shows on cable TV.*
- *Live events and the news are the least favorite content among kids of all ages.*

Ranked 1st, 2nd, or 3rd

Content type	8-11 year olds	12-14 year olds	15-18 year olds
Drama/Reality series on cable TV channels	37%	50%	52%
All other types of cable TV content	32%	28%	27%
Streamed TV	53%	53%	54%
Short videos	38%	35%	30%
Movies	29%	34%	34%
Network TV shows	33%	31%	38%
The news	5%	10%	8%
Sports	15%	17%	20%
Live events	6%	10%	11%
Games	51%	33%	26%

Base: Total 8-11 (158), 12-14 (167), 15-18 (186); Q7. What are your favorite types of programming/content?

Viewing method of favorite type of content

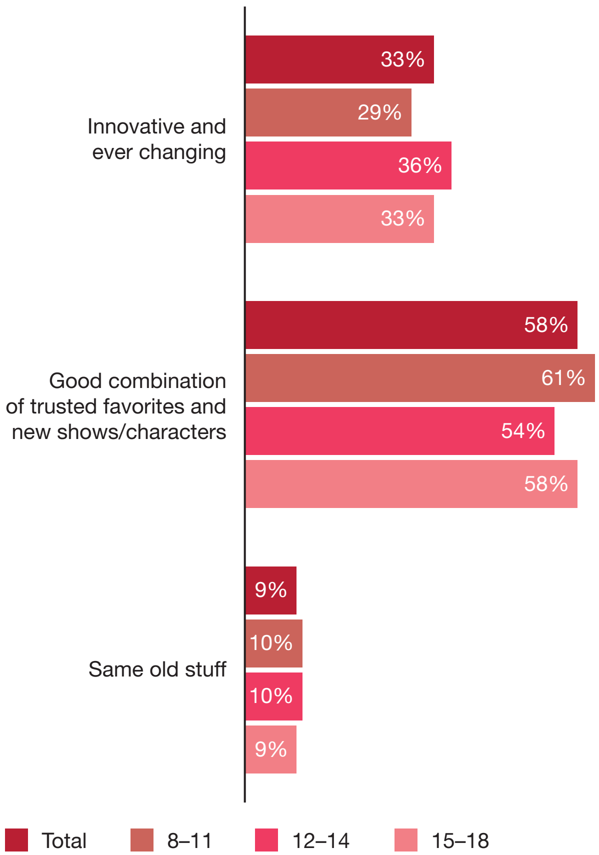
- *Overwhelmingly, kids/teens aged 8-18 favor watching most media content on television. However, there are a few exceptions as they prefer watching short videos on their phone and playing games on a laptop.*
- *Tablets are primarily used for streaming television and watching short videos, although this is not their favorite means of viewing this type of content.*
- *Phones are mainly used for viewing short videos, and to a lesser extent, playing games and watching the news.*

	Tablet	Phone	TV	Laptop
Drama/Reality series on cable TV channels	17%	9%	68%	6%
All other types of cable TV content	5%	22%	68%	5%
Streamed TV	21%	12%	44%	23%
Short videos	21%	53%	8%	18%
Movies	10%	9%	69%	12%
Network TV shows	5%	8%	79%	8%
The news	8%	22%	57%	13%
Sports	9%	19%	60%	12%
Live events	9%	16%	53%	22%
Games	24%	27%	17%	32%

Base: Ranked 1st , 2nd, or 3rd ; Q7. Then check the method that you typically engage in most often.

Quality of content

- *The majority of kids/teens believe that the quality of programming available is a good combination of trusted favorites and new shows and characters.*
- *Only a handful of kids think the content shown today is stale—the same old stuff.*
- *Roughly one-third view it as ever-changing. This perception is more strongly held by 12-14 year olds.*

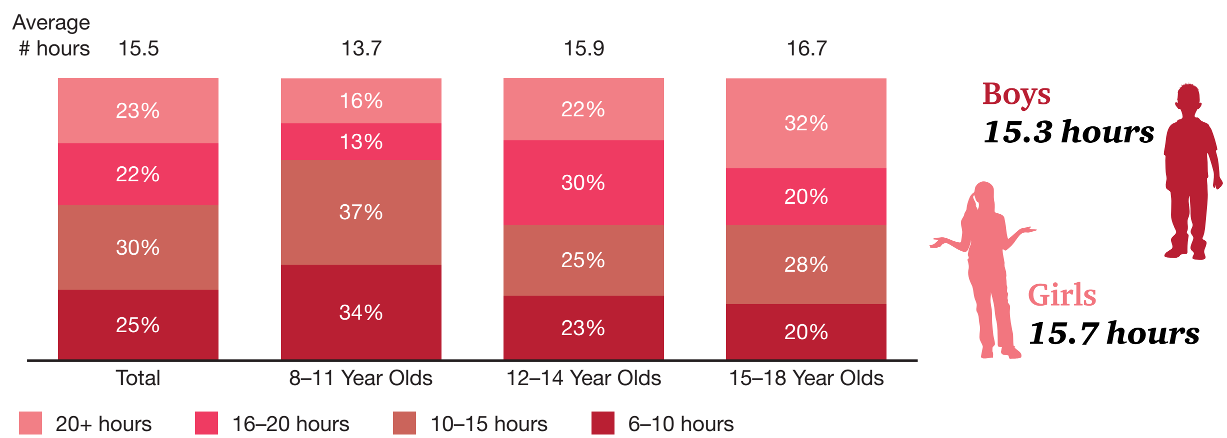


Base: Total Respondents (511); 8-11 (158), 12-14 (167), 15-18(186); Q9. How would you describe the quality of the content of the programming available now?

Weekly frequency of viewing media content

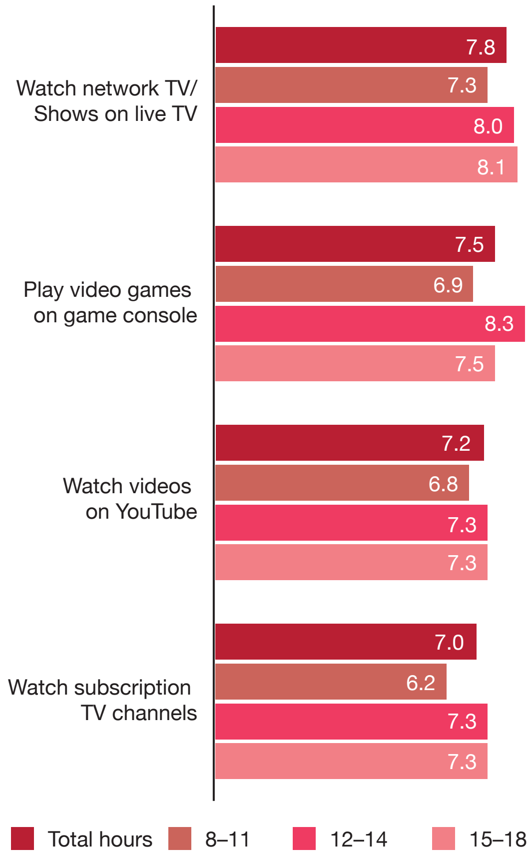
- *On average, young people (8-18 years old) spend 15.5 hours weekly engaging in all forms of media content.*
- *As children age, their media viewership increases with 15-18 year olds spending roughly 3 more hours a week playing or watching media than 8-11 year olds.*
- *Boys and girls spend roughly the same amount of time interacting with media content weekly.*

Hours spent watching content weekly



Base: Total Respondents (511) ; 8-11 (158), 12-14 (167), 15-18 (186), Girls (262), Boys (249); Q5. In an average week, about how much time do you spend engaging in all forms of media content?

Weekly frequency of type of content



Base: Total Respondents (511): Q6a. Thinking about the past three month period, how often, in an average week, did you typically engage in each of the following activities?

Weekly frequency of viewing specific types of media content—by age

- *Kids/teens spend the most time watching live network TV shows or playing video games on a gaming console each week.*
- *Teens 12-14 years old spend the most time engaging in all types of content, while 8-11 year olds spend the least amount of time.*
- *Watching sports or shows/movies that are academically oriented or deal with environmental/social issues are the least watched content across all age groups.*

Average number of hours a week

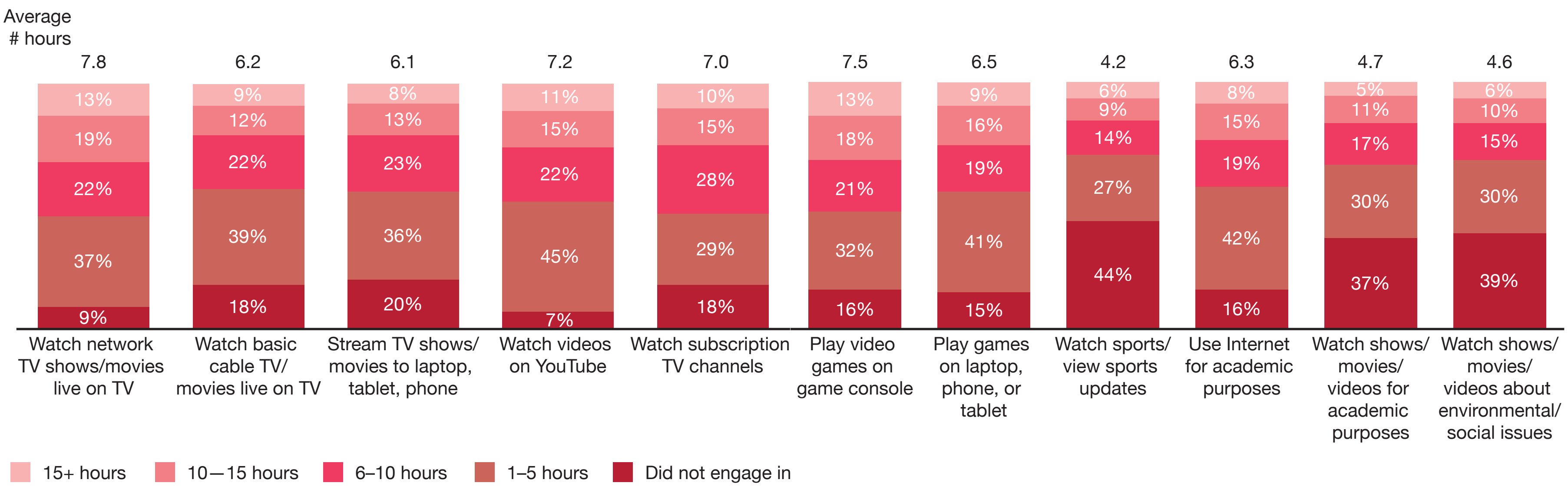
Content type	8-11 year olds	12-14 year olds	15-18 year olds
Watch network TV shows/movies live on TV	7.3	8.0	8.1
Watch basic cable channel TV shows/movies live on TV	6.1	6.6	6.0
Stream TV shows/movies to a laptop, tablet, or phone	5.8	6.3	6.2
Watch videos on YouTube	6.8	7.3	7.3
Watch subscription TV channels	6.2	7.3	7.3
Play video games on a game console	6.9	8.3	7.5
Play video games on a laptop, phone, or tablet	6.3	7.2	6.0
Watch sports/view sports updates	3.7	4.7	4.3
Use Internet for academic purposes	5.3	6.9	6.6
Watch shows/movies/videos for academic purposes/well-being	4.1	5.5	4.5
Watch shows/movies/videos that talk about environmental/social issues	3.7	5.1	4.7

Base: Total 8-11 (158), 12-14 (167), 15-18 (186); Q6a. Thinking about the past three month period, how often, in an average week, did you typically engage in each of the following activities?

Weekly frequency of type of content

- *When asked about their weekly viewing habits, boys and girls 8-18 years old claim to spend the most time watching live network TV shows/movies, playing video games on a gaming console, watching videos on YouTube, and watching subscription TV channels.*
- *On average, they spend the least amount of time weekly watching sports and watching shows, movies, or video content about environmental or social issues.*

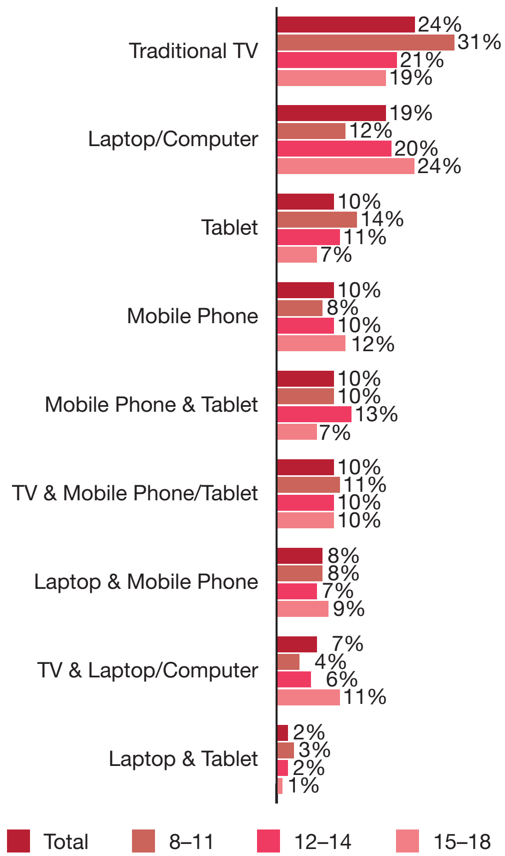
Hours spent watching types of media content weekly

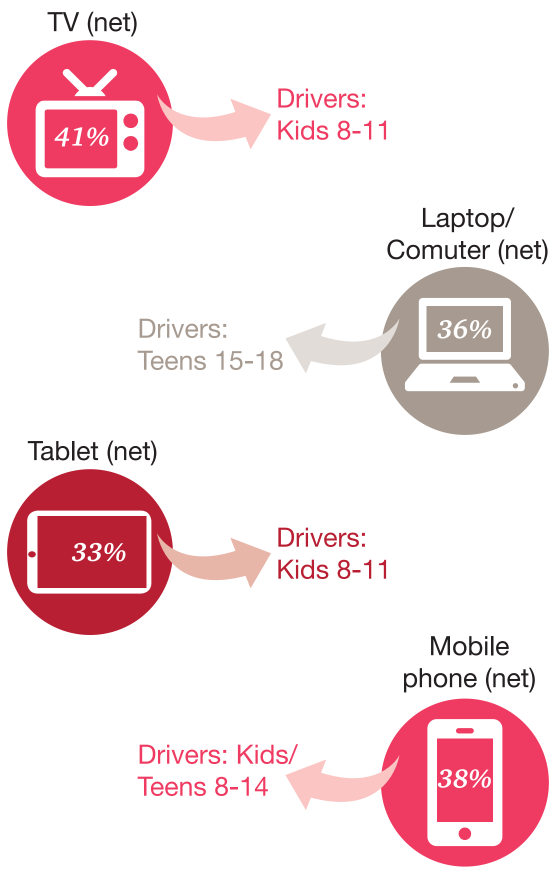


Base: Total Respondents (511): Q6a. Thinking about the past three month period, how often, in an average week, did you typically engage in each of the following activities?

Primary method of viewing media content

- *The most popular means of viewing media content is on a television or mobile phone. Young boys and girls (8-11) favor watching content on a traditional TV screen, while older teens 15-18 years old prefer using their laptop or computer for viewing media content.*
- *Kids 12-14 years old like to watch media content equally on traditional TV or a laptop/computer. As boys and girls age, they migrate from tablet viewership to watching media on their mobile phone.*



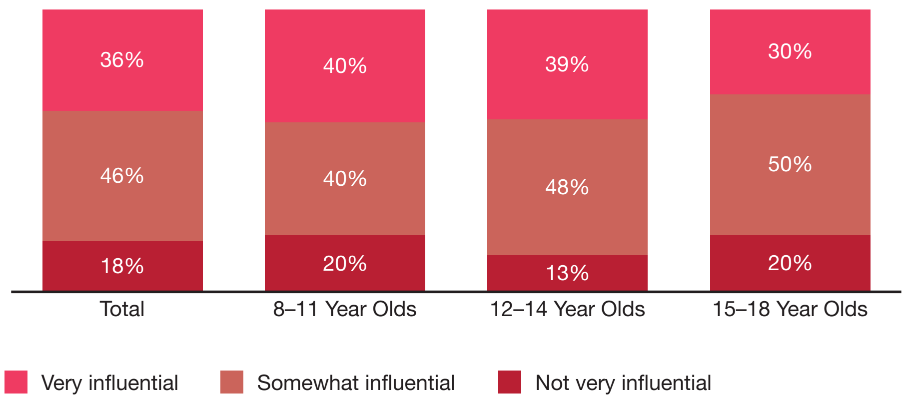


Base: Total Respondents (511) , 8-11 (158), 12-14 (167), 15-18 (186); Q6b. In a typical week, which of the following best reflects how you spend the most time viewing content.

How do kids influence their parents?

- *In general, kids consider themselves to have some influence over their parents regarding content viewed in their homes. Most kids understand that their parents have the final say in the matter.*
- *Kids/teens 8-14 years old believe they have the greatest influence on their parents when it comes to the content that comes into the home. Less than one-fifth of kids claim they are not very influential in this area.*
- *Some parents are more willing to compromise or at least consider their kid's input regarding the content they consume than others.*

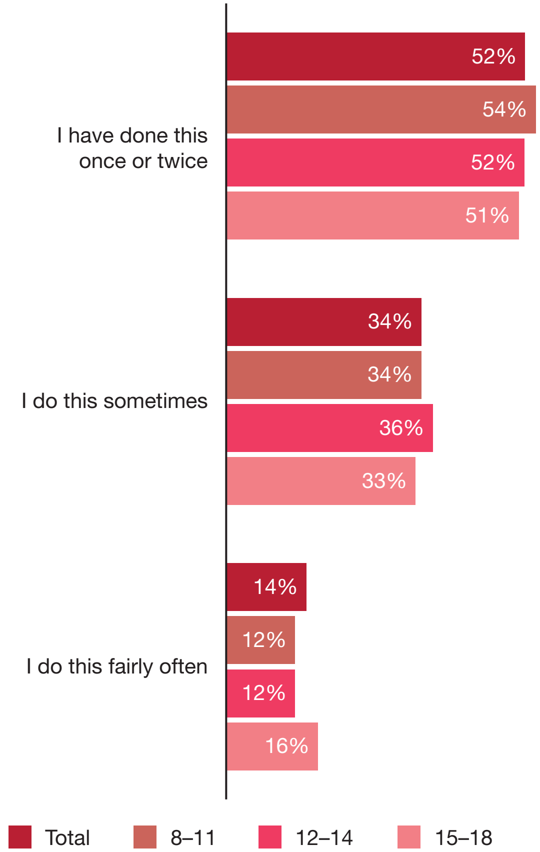
Extent of influence



Base: Total Respondents (511) , 8-11 (158), 12-14 (167), 15-18 (186); Q6b. In a typical week, which of the following best reflects how you spend the most time viewing content.

Do kids and teens download movies and music without paying?

- *Most kids have dabbled in downloading music or movies from the Internet without paying for it.*
- *Very few claim to do this often. No one particular age group downloads movies/music without paying for them more or less often.*
- *They all do it at an equal rate—mainly infrequently.*



Base: Total Respondents (511); 8-11 (158), 12-14 (167), 15-18(186); Q15. Which of the following reflects the extent to which you have been involved in downloading movies or music from the Internet without paying a fee?

Awareness of entertainment brands—by age

- *Awareness levels of entertainment brands vary a little by kids ages. In general, younger kids 8-11 years old are not as familiar with the majority of brands compared to their older counterparts, except for YouTube and Sprout.*
- *It is not surprising that boys and girls 12-14 years old have a higher awareness of the gaming brands, as they are big gamers.*

	Disney	Nickel-odeon	Cartoon Network	Amazon	YouTube	Netflix	Dream-Works	PBS Kids
Total	85%	83%	80%	80%	79%	78%	74%	73%
8–11	84%	84%	79%	77%	83%	77%	73%	72%
12–14	81%	77%	78%	80%	76%	79%	76%	78%
15–18	88%	87%	82%	81%	77%	78%	74%	68%

	Redbox	Hulu	EA Sports	Sprout	Zynga	Univision	Glu Mobile
Total	73%	71%	64%	60%	47%	46%	24%
8–11	68%	63%	54%	70%	38%	37%	22%
12–14	78%	74%	69%	67%	55%	52%	28%
15–18	72%	74%	68%	45%	48%	50%	22%

Base: Total Respondents (511), 8–11 (158), 12–14 (167), 15–18 (186); Q11. Please review the following list of entertainment brands. For each one, please indicate if you are aware of this brand.

Interest in entertainment brands—by age

- *Interest in entertainment brands varies some by age.*
- *Younger kids 8-11 years old show greater interest in Disney, Cartoon Network, Nickelodeon, Redbox, and Sprout, while older teens 15-18 years old are more drawn to YouTube, Amazon, and Sprout.*

	YouTube	Netflix	Dream-Works	Disney	Amazon	Cartoon Network	Nickel-odeon	Redbox
Total	38%	37%	30%	27%	26%	25%	25%	22%
8–11	37%	36%	33%	34%	23%	32%	30%	30%
12–14	32%	33%	23%	24%	22%	21%	24%	15%
15–18	44%	42%	34%	23%	31%	22%	21%	21%

	EA Sports	Hulu	Zynga	Glu Mobile	PBS Kids	Sprout	Univision
Total	20%	19%	17%	12%	12%	9%	9%
8–11	20%	19%	27%	15%	15%	14%	12%
12–14	17%	20%	12%	9%	10%	3%	8%
15–18	23%	17%	17%	15%	12%	12%	8%

Base: Total Respondents (511), 8–11 (158), 12–14 (167), 15–18 (186); Q11. Please review the following list of entertainment brands. For each one, please indicate whether or not you are interested in the content they offer.

Awareness and interest in brands/manufacturers—by age

- *All of the brands/manufacturers explored are well-known among kids of all ages. There is not much difference in levels of awareness by age groups. However, there are some differences seen by age in interest levels.*
- *In general, older teens (15-18 years olds) are more interested in the products these manufacturers offer than other groups, except Nintendo which is most appealing to kids 8-11 year olds.*

Awareness

	Apple	Sony	Nintendo	Microsoft	Samsung
Total	83%	83%	82%	82%	81%
8–11	87%	81%	84%	82%	78%
12–14	79%	82%	80%	83%	84%
15–18	82%	84%	84%	82%	81%

Interest

	Apple	Sony	Nintendo	Microsoft	Samsung
Total	40%	36%	33%	39%	33%
8–11	37%	36%	39%	35%	32%
12–14	41%	33%	29%	37%	30%
15–18	43%	39%	31%	45%	38%

Base: Total Respondents (511), 8–11 (158), 12–14 (167), 15–18 (186); Q12. Please review the following computer/mobile phone/gaming manufacturers. For each one, please indicate if you are aware of this brand and whether or not you are interested in the products they offer.

Awareness of social-media brands—by age

- *With the exception of the most well-known social-media brands, Facebook, Twitter, Instagram, and YouTube, awareness of all the other social-media sites is driven by pre-teens/teens aged 12-18 years old.*
- *This is most notable among lesser known sites, such as Tinder, ooVoo, and MeetMe. Curiously, Facebook has the highest level of awareness among 8-11 year olds.*

	Facebook	Twitter	Instagram	YouTube	Skype	Google+	Pinterest
Total	87%	83%	81%	80%	80%	76%	74%
8–11	91%	82%	80%	80%	75%	61%	67%
12–14	84%	83%	81%	78%	78%	80%	78%
15–18	86%	83%	82%	81%	84%	84%	76%

	Snapchat	Vine	Tumblr	WhatsApp	Tinder	ooVoo	MeetMe
Total	71%	67%	66%	58%	38%	36%	29%
8–11	56%	54%	50%	45%	22%	22%	21%
12–14	78%	73%	71%	64%	46%	43%	35%
15–18	77%	74%	75%	65%	45%	42%	31%

Base: Total Respondents (511), 8–11 (158), 12–14 (167), 15–18 (186); Q13. Please review the following social media brands. For each one, please indicate if you are aware of this brand.

Interest in social-media brands—by age

- *In general, there is less variability across age groups regarding interest in social-media sites.*
- *However, pre-teens/teens ages 12-18 years old show greater in interest in Facebook, Instagram, Twitter and Snapchat than younger kids 8-11 years old. Pinterest, Tumblr, and MeetMe appear to appeal most to older teens 15-18.*

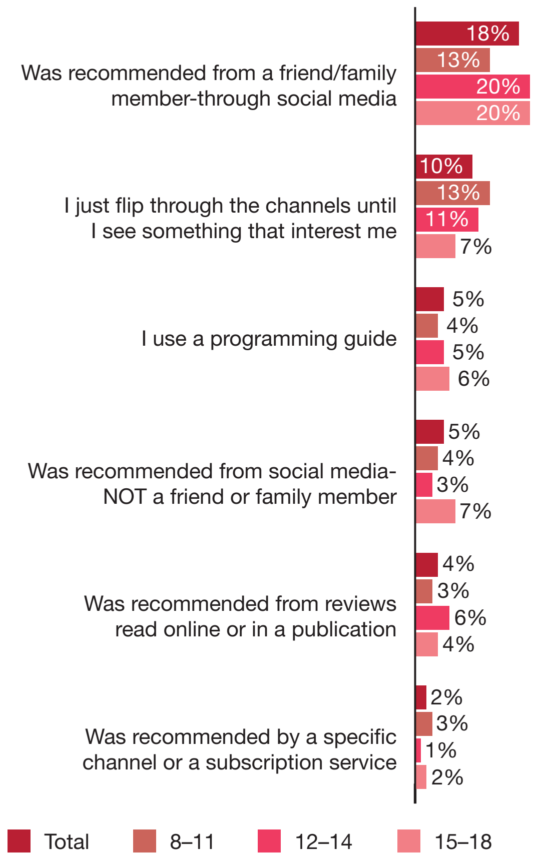
	YouTube	Facebook	Instagram	Skype	Twitter	Snapchat	Vine
Total	47%	37%	30%	26%	24%	23%	21%
8–11	45%	29%	18%	26%	12%	11%	19%
12–14	43%	38%	38%	26%	25%	26%	24%
15–18	52%	43%	34%	26%	33%	29%	20%

	Pinterest	Google+	ooVoo	WhatsApp	Tumblr	MeetMe	Tinder
Total	21%	13%	13%	12%	12%	10%	5%
8–11	17%	11%	15%	11%	10%	9%	6%
12–14	18%	12%	14%	10%	9%	7%	1%
15–18	26%	14%	10%	15%	16%	14%	7%

Base: Total Respondents (511), 8–11 (158), 12–14 (167), 15–18 (186); Q13. Please review the following social-media brands. For each one, please indicate whether or not you are interested in the content they offer.

How do kids find new content?

- *Kids find out about new media content primarily through commercials they saw on television, online or on billboards.*
- *Friends' and family direct recommendation is also a popular method of discovery*
- *Older teens 15-18 years old also rely upon friends and family recommendations posted on social-media sites.*



Base: Total Respondents (511); 8-11 (158), 12-14 (167), 15-18 (186); Q8. Which of the following best reflects the way in which you find out about new media content.

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For more information on this research, the PwC Consumer Intelligence Series, or how changing consumer preferences are shaping the entertainment, media, and communications industries, please contact one of our specialists:

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