LIVE PANEL

Teenage Report

June, 2020

group DATA & TECHNOLOGY

Introduction

This LIVE Panel Teenager Report is a collaboration project between MediaCom, Mindshare and Wavemaker.

Benefitting from the agencies' experience in audience planning and understanding of consumer sentiment, this reports authors have designed this framework to inform media planning for this key target group.

As part of GroupM's LIVE Panel, this report provides important insights into the behaviours of tomorrow's trendsetter.

MEDIACOM MINDSHARE Wavemaker

LIVE PANEL

Executive Summary

Today's teenagers are positive about life and have strong, personal and highly individual aspirations. They prioritise having a job they love over any need to conform to expectations. However, growing up with the consequences of a global recession means these ambitions are underpinned by a strong need for financial security and realism.

The combination of their digital prowess and focus on money/security means that teens are highly informed, self-reliant and extremely savvy decision-makers. They have a thirst for knowledge and actively spend time researching information online to stay up-to-date and maximise every penny they spend.

Brands have nowhere to hide when winning the hearts and minds of teens. They must be transparent, trusted, deliver on individual lifestyle preferences and, above all, represent, and actively demonstrate, the values that are important to teenagers - Nike, Adidas, Apple and Samsung have all achieved this and are globally loved. Brand communication is accepted, but only if it delivers on these brand values in a relevant and personal way.

Online influencers who relate to teenagers, forming strong emotional bonds with them, are extremely powerful and heavily affect decision-making. However, friends and family are still the most trusted sources of information.

Executive Summary

TV is still particularly important. Teens are one of the most frequent users of TV (78% daily). Digital TV takes the lead, but a significant number are actively choosing to watch live TV (60% daily). They like to be the first to watch their favourite shows and talk about them with friends - live TV delivers on this, as well as providing the ultimate big-screen viewing experience.

The digital world isn't exciting; it's simply another space for teens to hang out in. They crave social connection, the ability to constantly share their lives, thoughts and emotions and be updated about the lives of others. Digital social platforms and the mobile phone are their lifeblood, enabling in-the-moment connection constantly.

Personally curated content is the language of social exchanges. Teens choose how to individually express themselves online (as per any social space) and to appear interesting, well-liked and attractive to friends/family. Ensuring content is "social media ready" is of huge importance and teens regularly edit content (applying filters / enhancements) to portray the "best" version of themselves online. Having multiple social accounts, and multiple accounts on the same platform, is commonplace, allowing teens to explore their identities further and present a different image of themselves according to context/audience.

TikTok (the short-form video-sharing app) is quickly becoming part of youth culture and is rapidly growing year-on-year (500 million new users in 2019). Its popularity looks set to grow, with younger teens being the heaviest users.

Facebook still has huge influence and cannot be disregarded, especially with older teens. Whether this is driven by its broader functionality, meeting wider needs, or whether usage is more passive (keeping up with family, providing log-on credentials, etc) needs further exploration. Either way, the teen audience is still extremely active here.

Teens take active responsibility for what they post online to answer their concerns about online privacy. Aware of the potentially harmful future impact of their digital data, they only share personal content with close friends/family. Online bullying is also a major concern. The digital, constantly connected, world has given this a round-the-clock potency which previously didn't exist.

Methodology Overview

In order to understand the behaviour and attitudes of teenagers, and to deliver insight and implications for marketers, GroupM has used its proprietary online consumer panel, LIVE Panel, to seek the opinions of 8,000 teenagers aged 13-17 (where younger audiences = 13-14 and older audiences = 15-17). All teenagers were recruited via their parents and interviewed under parental guidance using an online questionnaire. The sample was split equally between girls and boys and the research covered 18 markets globally: Austria, Belgium, Brazil, Canada, China, Finland, Germany, Hong Kong, India, Italy, Mexico, Saudi Arabia, South Africa, Spain, Taiwan, UAE, UK and USA. All research was conducted online.

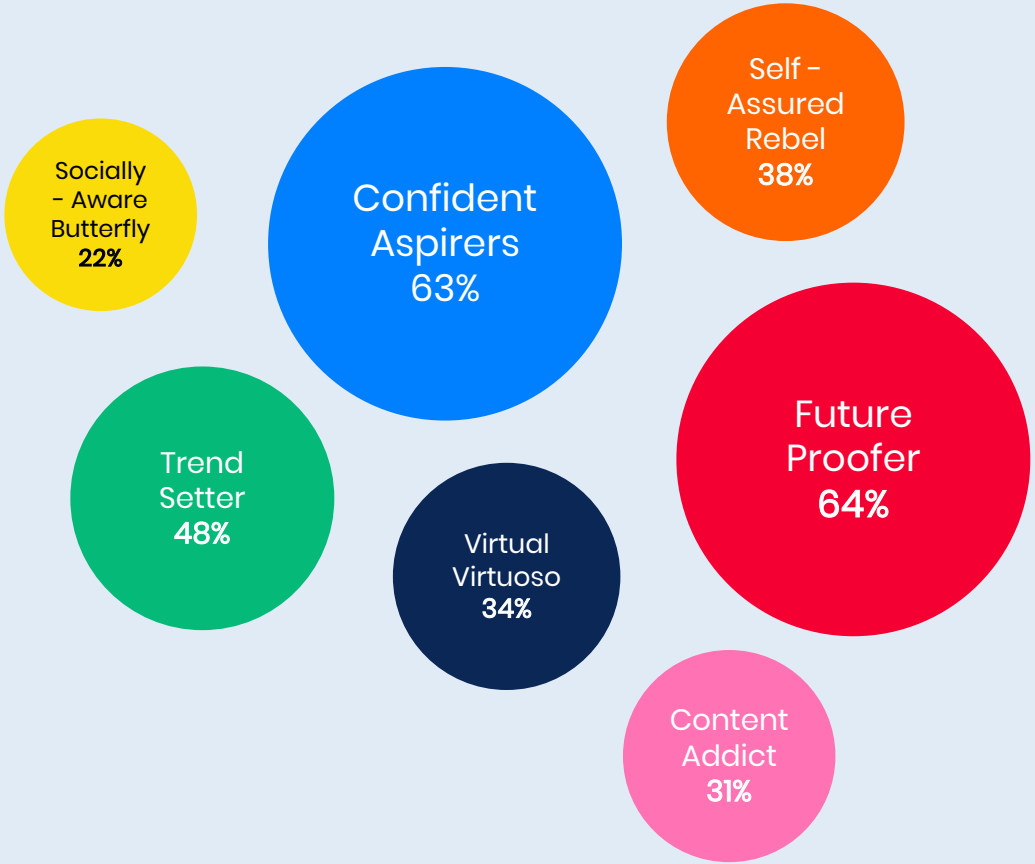
NOTE: This study was conducted prior to the outbreak of coronavirus. The main body of the report covers the study findings only. However, we have included an addendum to provide our view on the impact of coronavirus on this audience.

Overview

Today's teenagers are tomorrow's trendsetters. They have grown up surrounded by digital technology, the consequences of a global recession and new-world terrorism (and now coronavirus). Although most teenagers are still (fairly) dependent upon parents/guardians, this environment has significantly affected their opinions and attitudes in life, which will guide their media consumption, purchasing behaviour and attitudes towards brands and institutions into adulthood.

We have identified seven personality archetypes within our study.

These archetypes are not mutually exclusive, meaning the average teenager can have multiple personas.



Source: LIVE Panel Teenager Survey 2019/20

Overview

Seven Personality Archetypes

Confident Aspirers
Highly aspirational and already thinking about their career. Enjoy pushing themselves and taking on new challenges. Do not need approval from friends or family for decision-making - instead, life decisions are based on what is right for them. Highly value education but concerned about cost.

Self-Assured Rebels
Satisfied with their life right now and confident in who they are. Culture and tradition are important to them, but they also like to push boundaries/rules. Overall, it's important that others think well of them.

Socially-Aware Butterflies
Maintaining an online social image that receives views and likes is important to them, but they are also cautious about what they post in case it offends others or negatively affects them in the future. Online bullying is also a concern.

Virtual Virtuosos
Very heavy, and highly savvy, internet users. Comfortable protecting their online privacy, blocking adverts and not taking everything at face value, although can be shocked by what people share. Happier using online spaces to share their emotions.

Future Proofer
Focused on financial security, both in terms of saving money for the future and ensuring it is always spent wisely through heavily researching purchases. Value ethical brands and companies.

Trendsetters
Like to be the first to know about new things (TV programmes, technology, gadgets, etc) and to be the one that people come to for updates and advice. Adverts and celebrity endorsements accepted, but only if relevant to them directly.

Content Addicts
Love all forms of TV/video content and being in front of a screen. Use content as a form of social currency with friendship groups.

Pragmatic, Prudent, Individual & Aspirational

Today's teenagers are positive about life - 69% said that they are satisfied with life right now, irrespective of age or gender, ranging from 53% in Taiwan to 87% in Mexico.

They value individual expression and being themselves, not needing to conform to the expectations of others. They have strong personal aspirations in life and are already thinking about the career they would like - having a job they love is a priority (81% agree). This is true whether girl or boy, younger or older, and rises to 91% in Mexico and 89% in Austria/Spain. Only 36% feel under pressure to have a career in a field their friends and family approve of. They also value the role of education in helping them achieve this (70% agree).

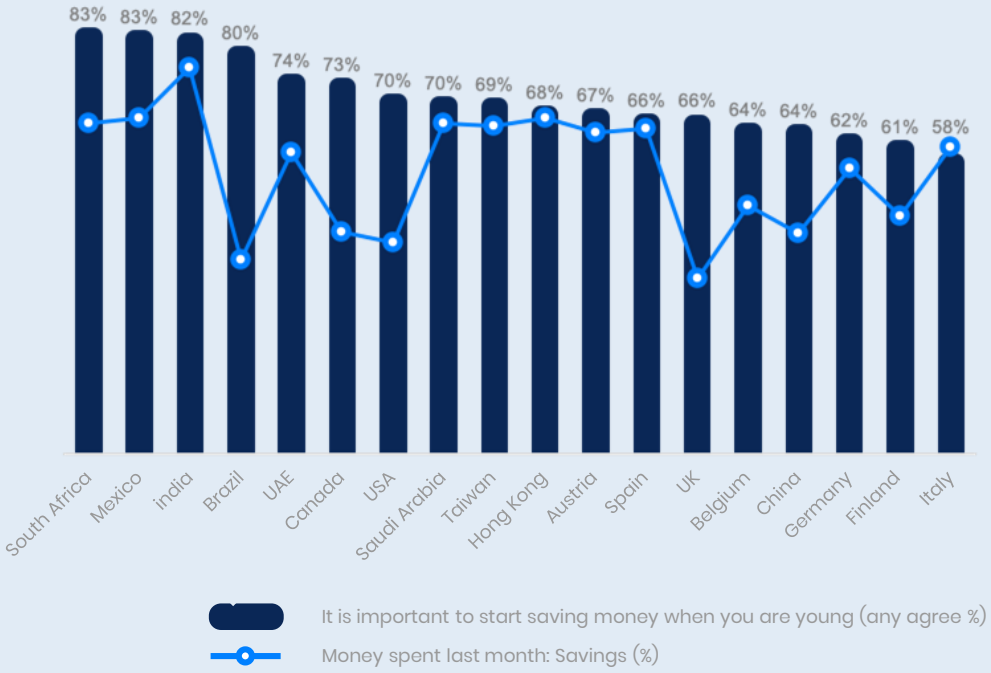
A sense of adventure and boundless curiosity are also key attributes of teenagers today. Some 62% state they always want to try and outdo themselves and take on new challenges. This independence, adventurous spirit and individualism is testament, in no small part, to their parents, who are primarily Gen X (40-55) (61%) as well as 35-39-year-old millennials (19%) - generations widely reported to encourage children to be more independent, to try new things and not to shy away from competition (in contrast to the micro-management of earlier generations).

This sense of self and celebration of independence is further evidenced by the fact that only 29% of 16-17-year-olds in our study felt it was important to be in a relationship at their age, while 44% actively disagreed with this statement. Teenagers do not need other people or things to define who they are.

However, although they aspire to succeed in what they love, teenagers are also realistic about what is attainable. Aspirations are sprinkled with a lean towards money and security, perhaps driven by a desire for the financial security their parents now lack. Seventy per cent agree that it is important to start saving money when young - true whether boy or girl, younger or older, ranging from 58% in Italy to over 80% in India, Mexico, South Africa and Brazil. Unsurprisingly, Future Proofers score highest, with 84% in agreement.

In addition, 56% of our sample said they had put money into savings in the last month, ranging from 77% in India to 39%/35% in Brazil/UK, respectively.

Teenage Financial Behaviour



Question: How much do you agree or disagree with "It is important to start saving money when you are young"
Source: LIVE Panel Teenager Survey 2019-20 **Base:** 8,888 teenagers aged 13-17

Furthermore, despite the focus on saving from a young age, financial security will continue to be a conscious consideration as they move into adulthood. Forty-two per cent are still worried about getting into debt in the future, rising to 58% in Brazil, 57% in Mexico/Saudi Arabia, 56% in South Africa and 56% among Future Proofers.

However, it is worth noting that this attribute of individualism doesn't negate the importance of culture and tradition – only 19% believe this is unimportant in their lives. Also, teenagers still value societal rules (only 32% believe that rules are there to be broken, almost entirely driven by the APAC markets - +74%).

SOUTH AFRICA

Historically, saving has been extremely low. However, an annual initiative to encourage savings awareness appears to be having a positive impact on teenagers with regards to their attitudes towards financial security.

MEXICO

No state pension plan for anyone born after 1997, and therefore saving money is likely to be more important to this age group.

INDIA

A strong cultural mindset on saving for tomorrow is engrained from a young age - specifically for important life events, such as education, marriage and gaining property.

BRAZIL

Facing the biggest recession in history, this has created a renewed focus on protecting futures and capital by saving. However, unemployment is high, so they are cash-poor.

IMPLICATIONS FOR MARKETERS

Starter Topics

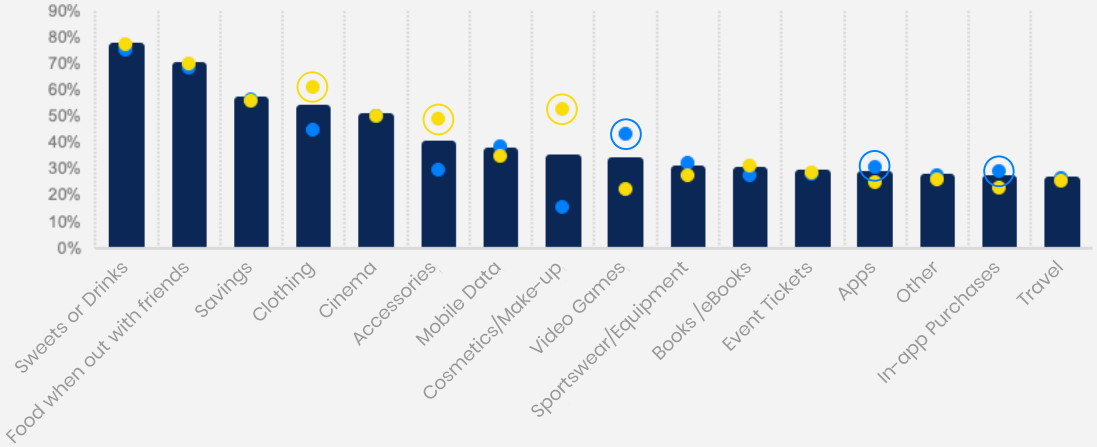
- Brands should talk to this audience with highly individual messaging.
- Let teenagers shape their own personal experiences that deliver against their own values.
- Messages should be aligned to teenager aspirations, but always "keeping things real".
- Demonstrate that you are on the teenager's side and communicate values that are increasingly personal.
- Always remember that if you get teen marketing right, you are both building brand image and securing a future pool of consumers - the future focus will then be on retention and loyalty as teenagers transition into adulthood.

A New Breed Of Super-Savvy Consumers

Born into a digital world, today's teenagers do not know life without a wealth of information readily available at their fingertips, allowing them to be self-reliant and in control of their decision-making. They are fully aware of the value of money, making them extremely savvy shoppers who are always looking to maximise every penny spent. Sixty per cent said that they fully research a product before they buy it and 54% agreed that they don't buy things spontaneously as they like to know more details first.

The main areas where teenagers have spent their money in the last month are sweets/drinks (76%), food when going out with friends (69%), savings (56%), clothing (53%), and the cinema (50%).Some $17 is the average amount of weekly pocket money that teenagers have to spend - as expected, older teenagers have more pocket money (+54%) and are more likely to spend money across most items. Girls are much more likely to spend money on beauty/fashion: clothing (+17%), cosmetics/make-up (+56%) and accessories (+25%). Boys spend more on entertainment: video games (+32%), in-app purchases (+12%), and apps (+11%). Trendsetters also tend to spend more money per month, especially on items that help them to be 'in the know', such as digital music (+43%), digital movies (+40%), music streaming services (+37%), electronic devices (+36%) and apps (+35%).

Monthly Category Purchasing



Question: Have you spent your money on this in the past month?
Source: LIVE Panel Teenager Survey 2019-20 **Base:** 8,888 teenagers aged 13-17

Teenagers also have a real thirst for knowledge and are consistently seeking out information to be better informed and updated on topics: 59% say that they read blogs weekly and 50% are actively researching/comparing products or services weekly. This behaviour is slightly more frequent for older teenagers, who have more disposable cash. A fun fact aligned to this is that 62% would rather have the ability to read minds than be able to fly.

IMPLICATIONS FOR MARKETERS

Starter Topics

- Brands and products have nowhere to hide and must always be transparent and show integrity to win with teenagers.
- Teenagers want to maximise every penny, so messaging should focus on the "return on investment".
- Brands should balance messaging between brand building and product efficacy, value and benefits.
- Given the importance of blogs and forums to discover and validate information, marketers need to ensure they understand the influencer dynamics.
- Use tactics such as rewarding mobile check-ins and improving the value of loyalty programmes to keep consumers focused on buying their products, even considering so many easily available alternatives.

Brands & Advertising Accepted, But Only On Their Terms

When it comes to purchasing brands and products, transparency and trust are key.

Teenagers will put their money where their (well-informed) values are, with 58% saying they prefer to buy products from companies that care about people and the environment. Teenagers prefer brands that reflect their core values. When asked about their favourite brands, the fashion/lifestyle brands come top. Globally, in order of mentions, the top-five brands are Nike (20%), Adidas (14%), Apple (8%), Samsung (5%) and Amazon (2%). Furthermore, Nike, Adidas and Apple feature in the top-five brand lists in every market, with Nike topping the charts almost everywhere (the only notable exception is India, where Apple falls further down the list). The same picture is seen across gender and age.

Nike is therefore a great example of a brand that has won the hearts and minds of teenagers today. They are well known for their focus on diversity and for actively speaking out about causes they support. For example, in 2018 they featured Colin Kaepernick, the American footballer, when he started the "Take a Knee" protest in the US against racial and social injustices, a part of their "Just Do It" campaign. This is hugely valued by teenagers and, in turn, drives brand affinity.

In terms of advertising, teenagers are receptive if it is relevant and personal to them. Some 57% stated they do not mind advertising if it is for things they are interested in (only 19% disagree). Furthermore, only 37% state they use ad blockers.

However, when comparing usage across ages, we can clearly see a correlation - the younger the audience, the more they use ad blockers. We would therefore anticipate this behaviour becoming more common in the future, and potentially posing an increasing challenge for marketers.

Total % Mentions

Question: What are the brands you feel connected to?
Source: LIVE Panel Teenager Survey 2019-20
Base: 8,888 teenagers aged 13-17

IMPLICATIONS FOR MARKETERS

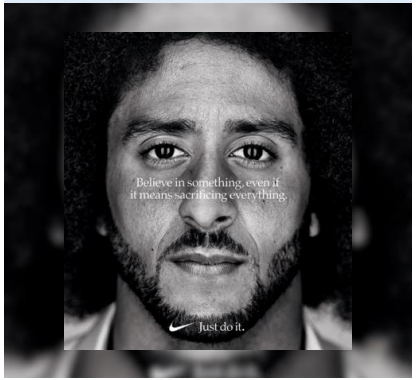
Starter Topics

- Brands can develop and strengthen their relationships with teenagers by communicating with them on their own terms and by adhering to their values.
- Allocate budgets to social media and branded mobile applications to allow consumers to create and share brand content.
- Brands must actively speak out about the causes they support for teens to understand what they truly stand for.

Brands That Have Succeeded In Engaging Teenagers

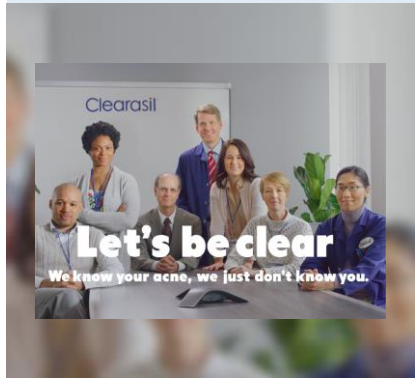
NIKE

Focused on DIVERSITY and actively speaking out about causes they support. In 2018, they featured Colin Kaepernick, the American footballer, when he started the "Take a Knee" protest in the US against racial and social injustices, part of their "Just Do It" campaign. This is hugely valued by teenagers and, in turn, drives brand affinity.



CLEARASIL

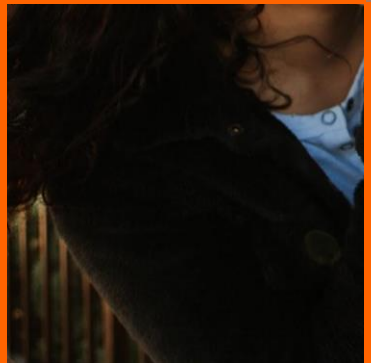
Focused on HONESTY / TRANSPARENCY. After having their brand campaigns publicly torn apart by teenagers, they built a successful campaign by being completely honest about the fact that, although they understand teenage skin, they don't know much about teenagers.



AXE CANADA

Focused on SELF-EXPRESSION / INDIVIDUALITY. Based on consumer insight around masculinity, showing that young men are shifting towards inclusivity and acceptance, and are more comfortable saying/doing things that would have been taboo in the past, AXE created their #Praise Up campaign. This was a change in direction from previous macho ads to something which celebrated modern masculinity: today's teen boys are more confident, independent, increasingly receptive and accepting of individuality, rather than fitting traditional stereotypes.

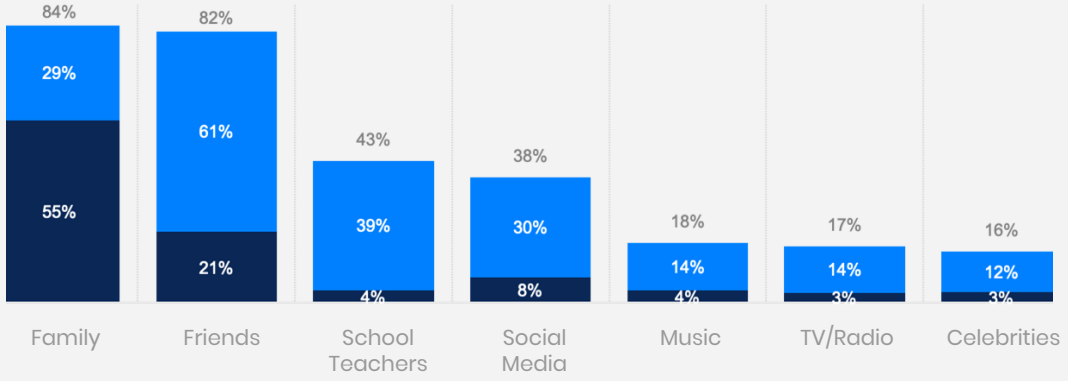
Family & Friends Are Still The Most Trusted



Friends and family are still the most influential in helping teenagers make decisions.

Family is the most influential (84% ranked it one-three, 55% ranked it number one), followed by friends (82%/21%) and schoolteachers (43%/4%). This demonstrates that a familiar face is still the most trusted source of information, providing an honest opinion that is specific to the person and understanding of their personal needs. In contrast, teenagers state that media and celebrities have little influence on their purchase decisions: 18% ranked music they listen to in the top-three spots, followed by TV/radio (17%) and celebrities (16%).

Teenage Influencers



Question: When it comes to making decisions, who or what has the biggest influence on you?
Source: LIVE Panel Teenager Survey 2019-20
Base: 8,888 teenagers aged 13-17

However, the role of celebrity isn't as clear-cut as the above data would suggest. The rise of YouTube / TikTok celebrities (influencers and vloggers) has been well documented. The strength of their influence is based on relatability and a strong emotional attachment with their fans. Some 42% of our teenagers stated that if a celebrity they admire promotes a product they are more likely to buy it, especially in APAC (+33%) and Latin America (+28%) regions. Furthermore, certain archetypes are more likely to be influenced by celebrities, specifically the Trendsetters (+33%) and the Socially Aware Butterflies (+22%).

IMPLICATIONS FOR MARKETERS

Starter Topics

- Teenagers spend vast amounts of time on social platforms and respond better to those they see as their peers.
- Influencer marketing targets audiences in the environments they spend time in and approaches them on their level. Therefore, a strong influencer marketing campaign is essential for this audience.
- Marketers need to understand and utilise the nuances of the role(s) of different celebrities/influencers for the teenager audience.
- Brands should tap into social with authentic content to influence the influencers.

TV Still Has An Important Role To Play

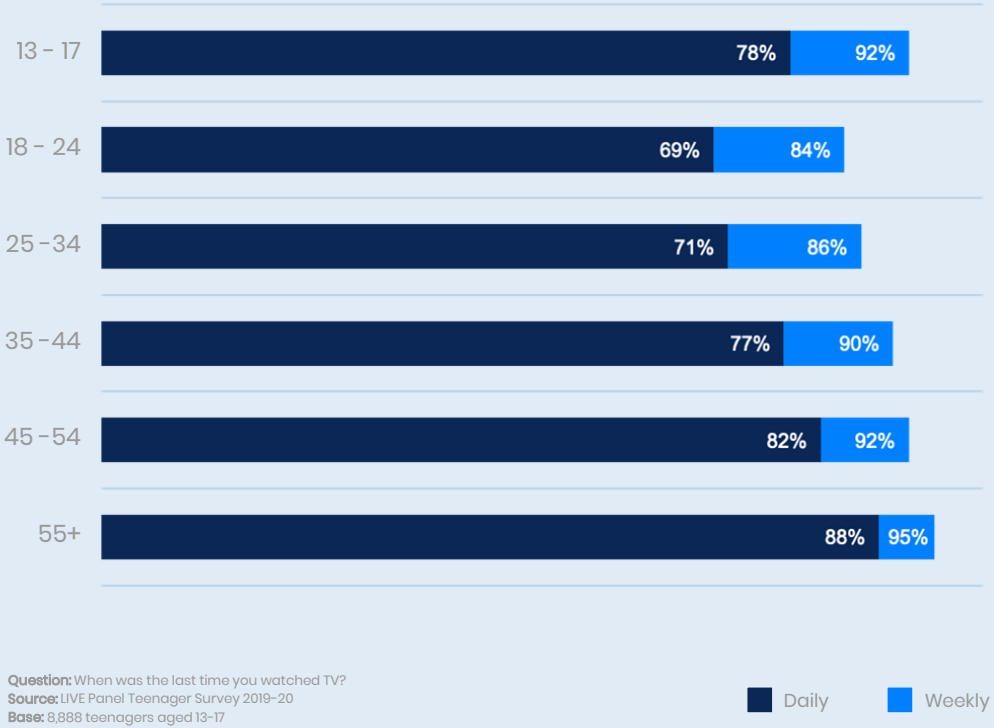
Much has been said about the fact that teenagers don't watch TV anymore, but our study doesn't support this.

In fact, 78% of teenagers state they watch TV daily, rising to 92% weekly, for approximately 1.5 hours per day. This ranges from 59% daily in China and Finland to 90% daily in Italy. Furthermore, if we compare with older age groups, we see that teenagers are watching TV more frequently versus adults aged 18-34 - probably due to spending more time at home - and at a similar level to those aged 35-54. Also, only one-third state that TV doesn't cater for them. This clearly demonstrates that it still has a meaningful role to play for this age group across the world.

Despite growing up in an on-demand world, we also found that live TV is still important, albeit to a lesser degree than digital media (which allow teenagers to be in control of what they want to watch, when they want to watch it). We found that 60% watch live TV daily and 87% weekly (versus 69% who watch digital TV/video content daily), rising to 66% and 65% for Trendsetters and Content Addicts, respectively.

To underline the importance of live TV, we also found that viewing occasions are driven by teenagers themselves as much as by others. Of those who watch live TV, the viewership is either on their own (69% daily, 83% weekly) or in-home with friends and family (62%/83%).

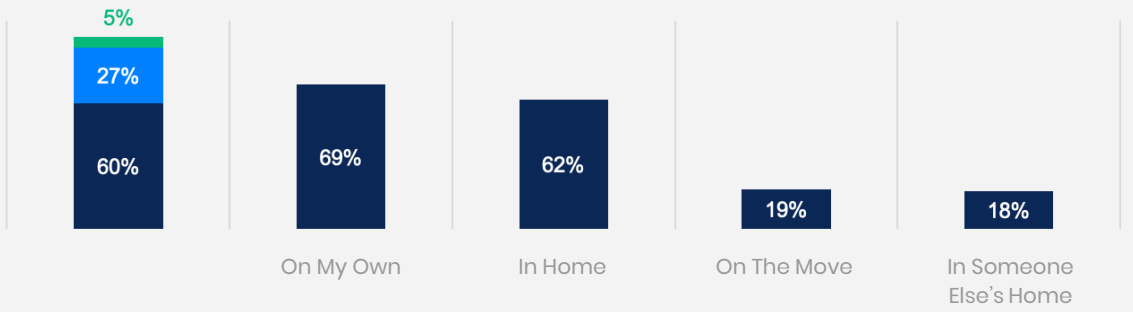
Daily / Weekly TV Viewing By Age



Question: When was the last time you watched TV?
Source: LIVE Panel Teenager Survey 2019-20
Base: 8,888 teenagers aged 13-17

Live TV Consumption And Occasions

Occasions based in those who watch live TV daily



Question: How often do you watch live TV (not streamed or pre-recorded) in the following ways?
Source: LIVE Panel Teenager Survey 2019-20
Base: 8,888 teenagers aged 13-17

Daily Weekly Monthly

TV is also an important social currency for teenagers. Globally, 65% state that they often talk to their friends about shows they have seen on TV and 49% like to be the first in their group to watch a TV show they all like. The TV set still provides the big-screen impact for their favourite shows, with 49% preferring to watch this way. The appointment-to-view programmes are individual to each market, but understanding these will ensure brands efficiently can reach teenagers when they are attentive.

IMPLICATIONS FOR MARKETERS

Starter Topics

- Target the appointment- to-view programmes and build brand affinity, with relevant sponsorship or product-placement opportunities.
- Tap into second-screening behaviour and create real-time content for them to share with friends and family.

A Generation Of Digital Socialites

Today's teenagers are the only age group to grow up from babies with the iPhone and social media.

The digital world isn't exciting to them: it's a fundamental part of life and simply another space for them to hang out in. They crave this digital social connection, the ability to share their lives, thoughts and emotions with others in the moment, and to be constantly informed and updated about the lives of others. In fact, 64% would rather eat the same food for the rest of their life than be without social media (with Germany bucking the trend at 42%).

Social media is the number-one digital activity for teenagers, with 90% using at least one social media platform daily, ranging from 77% in China and 82% in US/Germany to 98% in Finland and 97% in Brazil/Saudi Arabia. Teenagers spend on average just under two hours per day on social media - much less so in China (-41%) and Germany (-33%) and more so in Brazil (+57%) and South Africa (+44%).

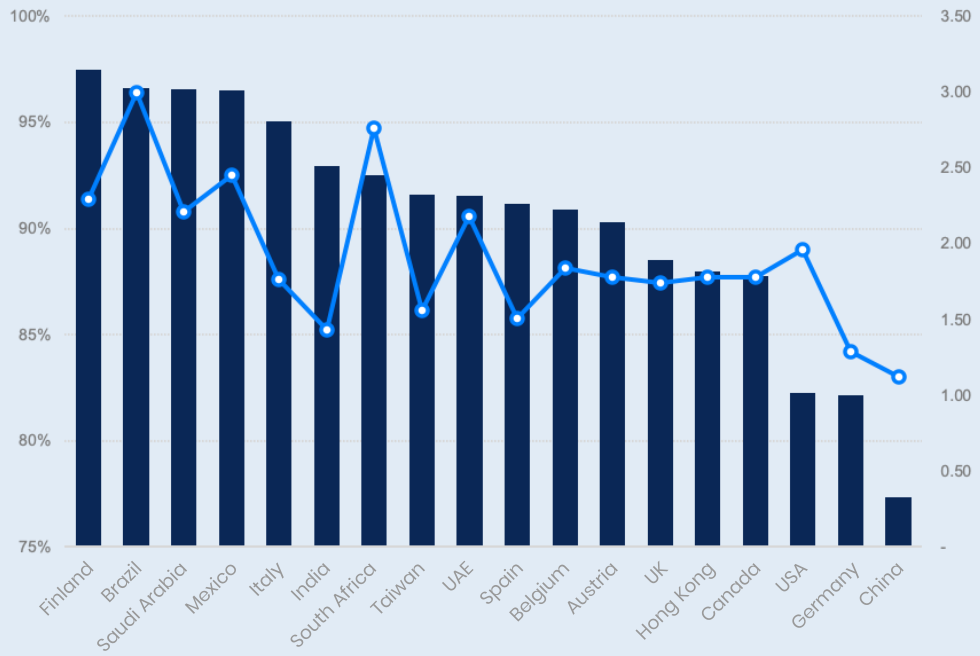
GERMANY

Generally more sceptical towards all types of internet content versus other markets and use it less as a result - social media included.

CHINA

Teenagers in China spend much of their time on homework / are additionally curriculum-focused, preventing them from doing "unpurposeful" things unrelated to their studies, such as social media.

Social Media Daily % Usage And Time Spent

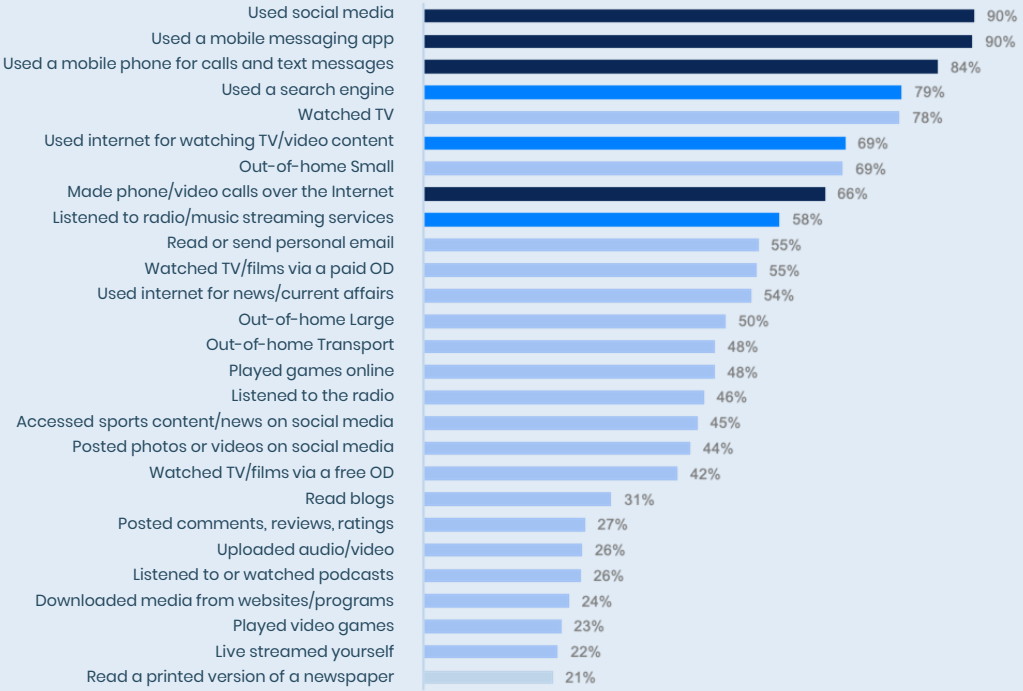


Question: How much time do you spend using social media?
Source: LIVE Panel Teenager Survey 2019-20
Base: 8,888 teenagers aged 13-17

Use social media daily %

Social media average day hours spent

Media Usage - Daily



Question: When was the last time you ... ?
Source: LIVE Panel Teenager Survey 2019-20
Base: 8,888 teenagers aged 13-17

Teenagers have a large network to communicate with via social media, with an average of just under 460 followers per person! Trendsetters have the most followers (550), while teenagers in Germany and Taiwan have significantly fewer (225/240, respectively).

The majority of other high-frequency digital activities are also aligned to this need for social connection - using a mobile messaging app (90% daily), using a mobile phone for calls/texts (84%) and making phone/video calls over the internet (66%).

Using the internet for information and entertainment is also particularly important. Some 79% use a search engine daily, 69% watch TV/video content online and 58% listen to music online.

The mobile phone is their go-to device, enabling round-the-clock instant connection. Teenagers simply can't afford to be out of touch for a moment and risk missing out on something. In fact, a recent GWI report on Gen Z found that just under six in 10 said that it was critical for them to be contactable at all times, and a similar percentage agreed that they felt more insecure without their phone than their wallet.

Note: most markets (except India) within this study have a mobile-phone penetration among teenagers of close to or more than 90%.

Furthermore, 67% stated they would rather have super-fast Wi-Fi than infinite battery (the latter can be solved, but the former is imperative for instant connectivity). As termed by Mindshare, FOMO (fear of missing out) has truly become FOBO (fear of being offline).

Social platforms also provide a support network for teenagers emotionally. Interestingly, or worryingly, 43% say they find it easier to do emotional posts about their feelings than speak to people face-to-face. The potential negative impact of this on the future capability of teenagers to make strong personal connections, and on their mental health, has been widely reported.

There is perhaps a sense of digital overload beginning to creep in, with 53% saying that they think they spend far too much time on the internet (33% somewhat agree, 20% completely agree), particularly so in Saudi Arabia (70%) and Brazil (67%), and for Virtual Virtuosos (64%). Whether this attitude will eventually result in a reduction of time spent online only time will tell, but probably unlikely given the emotional ties involved.

IMPLICATIONS FOR MARKETERS

Starter Topics

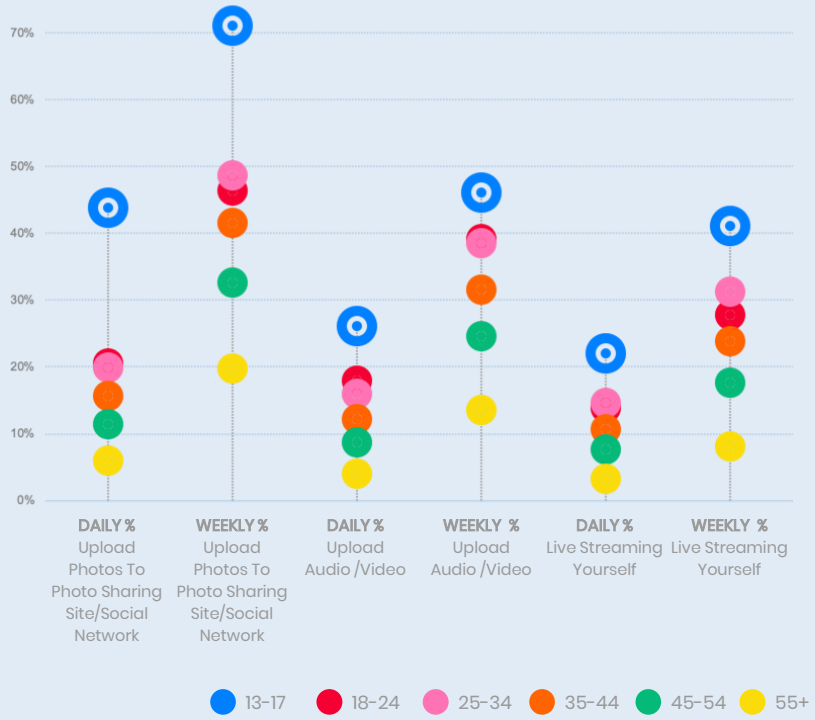
- Teenagers exist in a mobile social world. It is critical to develop a strategy that fits seamlessly into this world.
- Incorporate capabilities for teenagers to "socialise" directly with your brand across the purchase cycle, based on their individual lifestyle and aspirations.
- Ensure all social contact with your brand is real-time and two-way.
- Don't try to directly sell products to teenagers in this social world - this could risk long-term damage to your brand perceptions.
- Brands must be responsible and supportive when using social media and ensure all content is appropriate.

Sharing The Digital “Me”

Teenagers are avid content sharers, substantially more so than any other generation.

In fact, you could argue that content has simply become the new language of online social media exchanges. They are recording moments, events or thoughts from their daily lives and sharing these online.
Some 44% are posting photos/videos on social media daily, with 70% posting weekly. In addition, a significant proportion are regularly uploading audio/video online (26% daily/46% weekly) and live streaming themselves (22%/41%).

Content Activity by Age



Question: How often do you see, hear or do each of the following online? **Source:** LIVE Panel Teenager Survey 2019-20 **Base:** 8,888 teenagers aged 13-17 / **Source:** LIVE Panel Hub Survey 2019-20 **Base:** 167,073 internet users aged 18+

Teenagers are individually choosing how to express themselves online, selecting content that makes them appear interesting, well-liked and attractive to friends and family. Some 60% said they care about what other people think about them, 41% feel the need to get likes on posts and 31% actively get upset if they don't. This behaviour is particularly marked in APAC and the Middle East, and for Socially Aware Butterflies.

Ensuring images are "social media ready" is of paramount importance. Two-thirds frequently edit their photos before uploading them online. Of those who do, the most common thing is to apply a filter (59%). Filters add impact to photos by changing the mood or feel of an image - improving aesthetics, highlighting objects or making photos feel more special, fun, cool or unique. This in turn means that the content is more likely to be viewed (+21%) and receive comments (+45%).

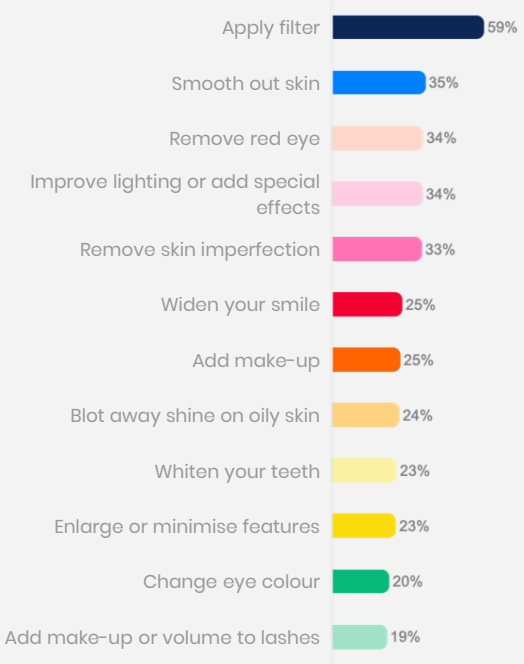
Teenagers are also mindful of how people visually present themselves online and are aware that many photos posted by celebrities have been Photoshopped (55% agree). They are creating their own individual digital brand through portraying the "best" (contextually specific) versions of themselves online.

They have the technology at their fingertips (eg, Facetune) that allows them to quickly and easily manipulate any image they want to. The next most common photo-editing processes are smoothing out skin (35% of those who edit photos), improving lighting and adding special effects (34%), and removing red eye (34%) and skin imperfections (33%). On average, each teenager uses 2.1 editing features, rising to 2.7 for Trendsetters and 2.5 for Socially Aware Butterflies.

Interestingly, despite the behaviour discussed above, 58% of our teenagers stated that how they look on social media is how they are in real life. They don't relate to the binary distinction between online and offline - they are simply two places where they socialise and hang out, and they will represent themselves in those places as appropriate. Notably, Socially Aware Butterflies buck the trend on this, with only 38% agreeing they are the same online and offline: a further 32% actively disagree.

Digital Photo Editing

Base: Those who edit photos



Question: Which photo editing features do you frequently use to make your selfies social media-ready? **Source:** LIVE Panel Teenager Survey 2019-20 **Base:** 8,888 teenagers aged 13-17

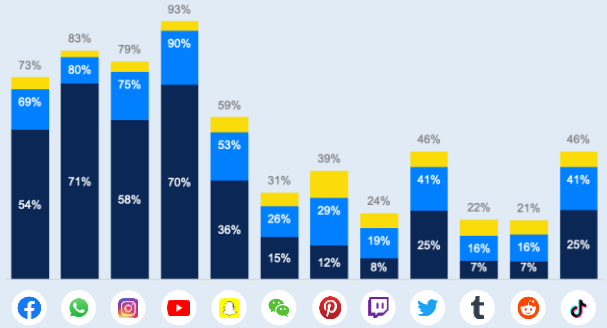
IMPLICATIONS FOR MARKETERS

Starter Topics

- Develop content based on how teenagers use social platforms - speak to them in their own "language".
- Allow teenagers to be curators and editors of their own shareable brand content, giving them the ability to individually express themselves.
- Ensure a harmonious brand experience online and offline.
- Use social media to document your brand's story in an authentic way.

The Social Landscape Is Multi-Platformed

Social Media Platform Usage

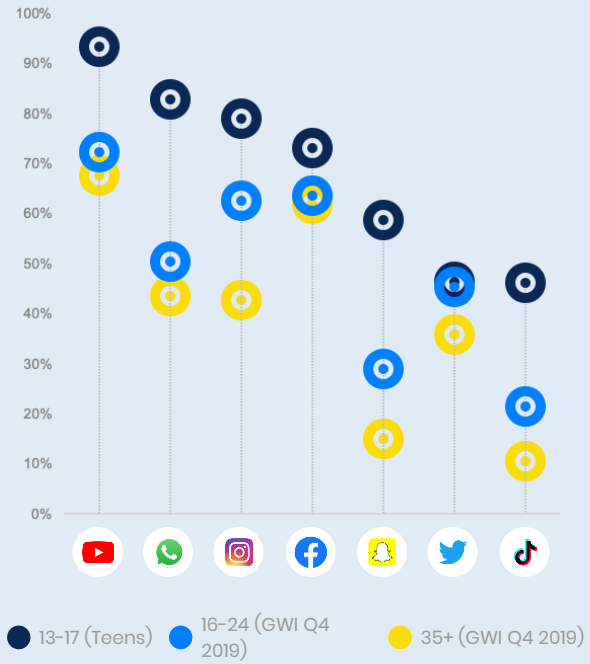


Question: How often do you use these social media or messaging sites/apps? **Source:** LIVE Panel Teenager Survey 2019-20
Base: 8,888 teenagers aged 13-17

Daily Weekly Monthly

Nearly two-thirds of teenagers (64%) use between two and five social media platforms daily. YouTube is, globally, the number-one platform (70% use it daily, 90% weekly), followed by WhatsApp (71%/81%), Instagram (58%/75%), Facebook (54%/69%), Snapchat (36%/53%) and TikTok (25%/41%). Instagram, Snapchat and TikTok are more female-orientated, while YouTube is slightly more male-orientated. Furthermore, teenagers use all social platforms (except Twitter) more frequently than older generations.

Social Media Platform Usage By Age



Question: How often do you use these social media or messaging sites/apps?
Source: LIVE Panel Teenager Survey 2019-20/ GWI Gen Z report
Base: 8,888 teenagers aged 13-17

group DATA & TECHNOLOGY

YouTube's scale demonstrates the huge importance of video, vloggers and influencers to this age group. In fact, a recent 'Awesomeness and Trendera' study showed that the average number of videos consumed by teens on mobile across YouTube, Snapchat, Instagram, Facebook and other sites is 68 per day.

Much has been written about the growth of TikTok. Although currently much smaller, it has seen rapid growth since it was launched in 2017 and is quickly becoming part of youth culture, especially in APAC (+43%) - unsurprising, given its origins - and the Middle East (+25%). In 2019, TikTok was announced to be the seventh most downloaded mobile app of the decade and it is still growing rapidly, with more than 500 million new users in 2019. Younger teens (13-14 year olds) are 22% more likely than older ones to use TikTok daily, suggesting its popularity may continue to grow.

TikTok is a short-form, video-sharing app that allows users to quickly and simply create and share videos of up to 15 seconds on any topic. Video content is part-lip sync, part-dance and part-extremely weird memes.

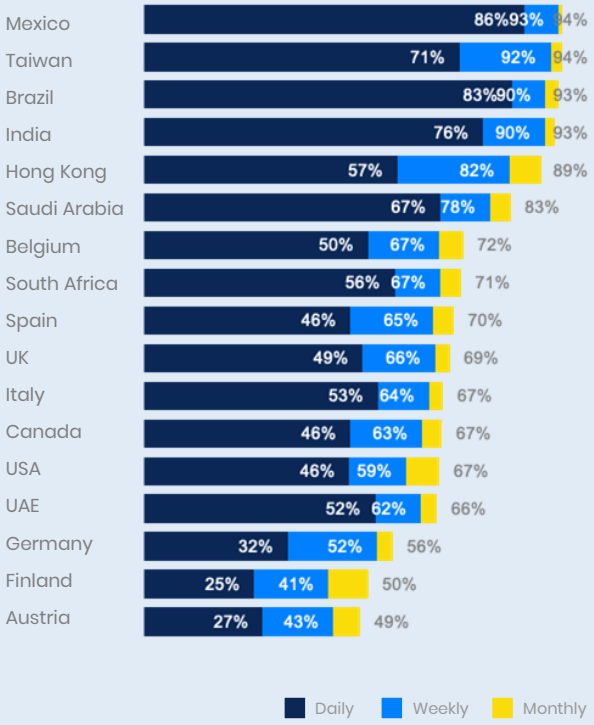
Celebrity endorsements and localised content have both been large drivers of its popularity. A big part of the content comes from #challenges (eg, Jimmy Fallon's #tumbleweed challenge, which gained more than 8,000 entries and 10.4 million engagements within a week; the #SafeHands challenge alongside the World Health Organization, which has received in excess of four billion views to date; and the #1MAuditon talent contest across several markets, where participants are given themes to create videos and the top video creators are awarded prizes. To date, there have been more than two billion downloads (March 2020, Sensor Tower).

Much has also been written about the demise of Facebook among today's teenagers - certainly, many data sources (eg, GWI, Pew Research, eMarketer) have shown declining levels of usage among younger audiences over the past few years (although this is heavily US- / Europe-centric). However, despite the headlines, our data shows this platform cannot be disregarded.

There is still a significant proportion of teenagers using Facebook (73% monthly), although this varies across markets, with significantly more usage in APAC and Latin America versus Europe and North America. The current strength of Facebook is also further evidenced in a recent study by We Are Social, which showed that it boasts the highest addressable advertising audience of global users aged 13-17 compared with other social media platforms.

However, there is a big difference in usage by age, specifically daily usage - 46% of 13-year-olds use the platform daily versus 60% of 17-year-olds. The question that marketers need to answer in detail is why teenagers use Facebook and whether these data suggest a declining trend over time. A number of reports (also US-centric) state that Facebook is no longer 'cool' and that teenagers only use it to keep up with distant family members, keep track of what their parents are posting about them, or to provide them with single log-on credentials and in-app information for other sites. However, it's worth noting that Facebook has much broader functionality compared with the likes of TikTok and Snapchat, which are much more single-minded, and therefore the rising level of usage as teenagers grow up may equally suggest a natural migration to Facebook's offering as interests and needs broaden.

Facebook Usage By Market

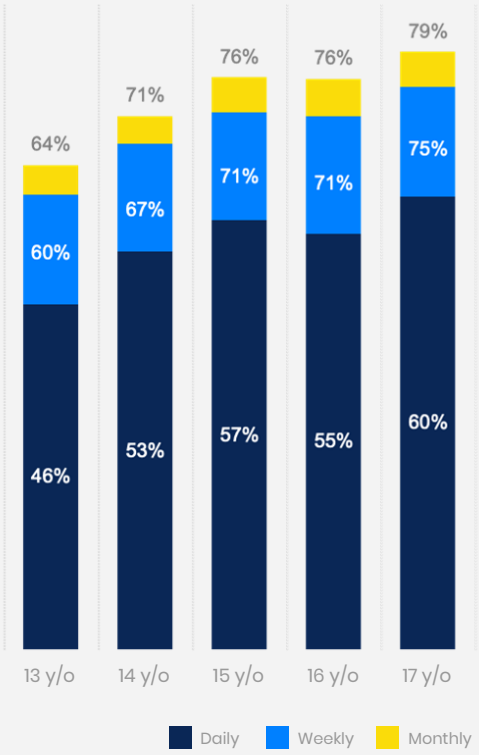


Question: How often do you use these social media or messaging sites/apps? **Source:** LIVE Panel Teenager Survey 2019-20 **Base:** 8,888 teenagers aged 13-17

Either way, Facebook has been actively looking to combat the potential threat of TikTok, with launches such as Lasso, Facebook/Instagram stories and Watch Parties. Also, it is worth noting that, given that Facebook also owns Instagram and WhatsApp, they still have a strong foothold with teenagers. In addition, half of teenagers have more than one social media account. A third have multiple Facebook accounts, again demonstrating its continued strength as a platform, followed by Instagram (30%) and TikTok (26%).

Multiple accounts on the same platform allow teenagers to explore their identities and present a different image of themselves according to different contexts and audiences, thus allowing them to curate how acquaintances, friends and work connections view them. This is demonstrated by the Instagram trend of "rinsta" (real account) versus "finsta" (fake/fun account). For many, a rinsta is their default account, where they manage their (often carefully curated) online public persona. By contrast, a finsta is almost always one's secondary account for close friends only. The content might include references to insider jokes, unflattering or humorous selfies, or memes that the core group might find funny.

Facebook Usage By Age

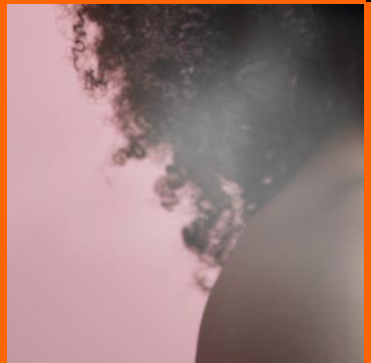


Question: How often do you use these social media or messaging sites/apps? **Source:** LIVE Panel Teenager Survey 2019-20
Base: 8,888 teenagers aged 13-17

IMPLICATIONS FOR MARKETERS
Starter Topics

- Ensure content is bite-sized and interesting enough to get teenagers to stop scrolling and engage with it.
- Understand the nuances of how teenagers use different social platforms and accounts to create content that is highly contextual.
- Ensure you are always up-to-date with the latest features and capabilities of social platforms.
- Connect the dots across platforms for a joined-up campaign.
- Create engaging, personalised and shareable video content.

Trust & Privacy In The Digital World Is A Key Concern



Having been born into this digital world, today's teenagers are aware of the risks and dangers of cyberspace.

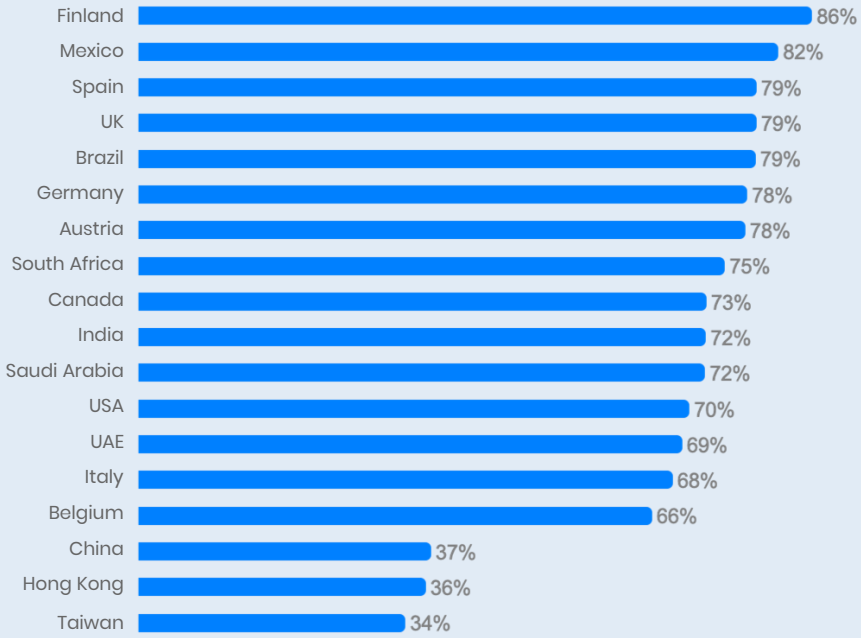
Some 69% said that they don't trust everything they see online. China, Hong Kong and Taiwan buck the trend on this (only 37%, 36% and 34% agree, respectively).

Teenagers have also learned the importance of online privacy and are cautious about sharing sensitive personal information online. A recent IBM study on Gen Z showed that while 62% are prepared to share purchase history details with brands online, only 21% said they would share more sensitive personal data.

However, despite their caution, 48% still worry they are unable to control their online privacy and 40% are concerned that the things they do will follow them online for the rest of their life. In the digital world, there is a real risk of personal data being shared without awareness or consent, as seen by the 50% who worry about being tagged in pictures they haven't approved. The inability to control privacy is particularly marked in markets such as China, Spain, India, Mexico and Saudi Arabia, while teenagers in Austria and Finland are least likely to be concerned about this.

I Do Not Trust Everything I See Online

% Agree



Question: How much do you agree or disagree with "I do not trust everything I see online"
Source: LIVE Panel Teenager Survey 2019-20
Base: 8,888 teenagers aged 13-17

To help police this, teenagers themselves are considerate of how their actions online may affect other people, with 62% taking time to consider what they post online in case it offends others. Teenagers also ensure they only share photos/videos within a tight circle of friends (80%) and family (63%), with almost no sharing beyond this.

Online bullying is another major concern, with 61% worrying about it. This isn't a new topic, as teen bullying was a problem long before digital technology came along. However, digital space, social media and the smartphone have given round-the-clock potency to bullying that previously didn't exist.

CHINA

Online is viewed as a source for recommendations, product reviews and celebrity/Key Opinion Leaders. These factors contribute to brand/product trust, which in turn lead to purchases.

FINLAND

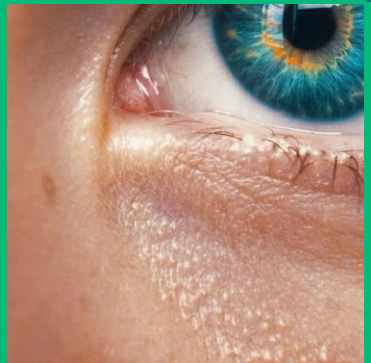
As part of the school curriculum, children are taught how to evaluate the trustworthiness of online information.

IMPLICATIONS FOR MARKETERS

Starter Topics

- Be entirely transparent with how teenager data is collected and used.
- Give teenagers control over what data they want to share and when.
- Build a trusted brand environment, but remember that trust takes time to build.

Addendum: The Impact Of Coronavirus On Today's Teenagers



This study represents teenager behaviour and attitudes prior to the coronavirus pandemic. The everyday life of teenagers has changed exponentially in a matter of weeks, with social distancing, curfews, quarantines, lockdowns and more: a huge impact today and into the future.

We know that teenagers are highly aspirational, like to push themselves and take on new challenges. The coronavirus crisis will be very painful for many - with school closures and cancelled events, many are losing some of the biggest and formative moments of their young lives, such as sporting events, school graduation and live music. These are often right-of-passage moments that can never be regained. Their loss is devastating.

We also know that teenagers highly value the role of education and therefore many will be concerned about missing out on academic activities and exams that will help them secure further education and employment opportunities: understandably, many will be wondering how this will affect their futures. This, in turn, may lead to higher levels of stress and anxiety among this age group.

This is further evidenced by a recent study in the US by DoSomething.org, which stated that the top emotions felt by teenagers towards the coronavirus are frustration (54%) and nervousness (49%).

The current global environment is likely to further embed teenage attitudes towards financial security. This highly informed audience will be acutely aware of the potentially damaging impact of coronavirus on the world economy, levels of unemployment and therefore the increased potential of getting into financial difficulties in the future.

Friendship groups are of utmost importance to teenagers and previous everyday moments of chatting and bonding with peers face-to-face have disappeared and will be greatly missed. This group already heavily use digital spaces to hang out and socialise - these spaces will become even more important during the crisis, as teenagers fulfil their need for social contact.

In fact, a recent GWI study showed that since the advent of coronavirus, Gen Z have increased the amount of time they spend on music/video/TV streaming services, messaging services, social media and apps, much more so than older generations. The role of these digital spaces is also expanding, as what used to be offline social activities are now moving online, eg, house parties (hence the growth of apps such as Houseparty and Zoom).

In addition, this adventure-seeking group is likely to be suffering from extreme boredom and hunger for stimulation. This, in turn, is driving creativity, as they are finding new ways to connect online to fulfil these needs. A great example is the #SafeHands TikTok challenge (videos of people washing their hands thoroughly to a song of at least 40 seconds in length) in collaboration with the WHO, adding huge credibility and thus aligning with their strong values.

These videos, many of which exude creativity and individual self-expression, have had more than four billion views to date. In line with this, GWI found that 41% of Gen Z want more how-to/tutorial videos and content to help them acquire new skills while in lockdown - much more so than older consumers (and second only to film content).

In summary, many of the identified behaviours and attitudes of teenagers are likely to be more deeply cemented due to the pandemic. Coronavirus has been a game-changer for teenagers, resulting in them learning new skills - creativity, adaptability and managing ambiguity that will last with them through to adulthood. Smart brands will provide teenagers with tips and support for navigating the current crisis, winning their hearts and minds now and into the future.

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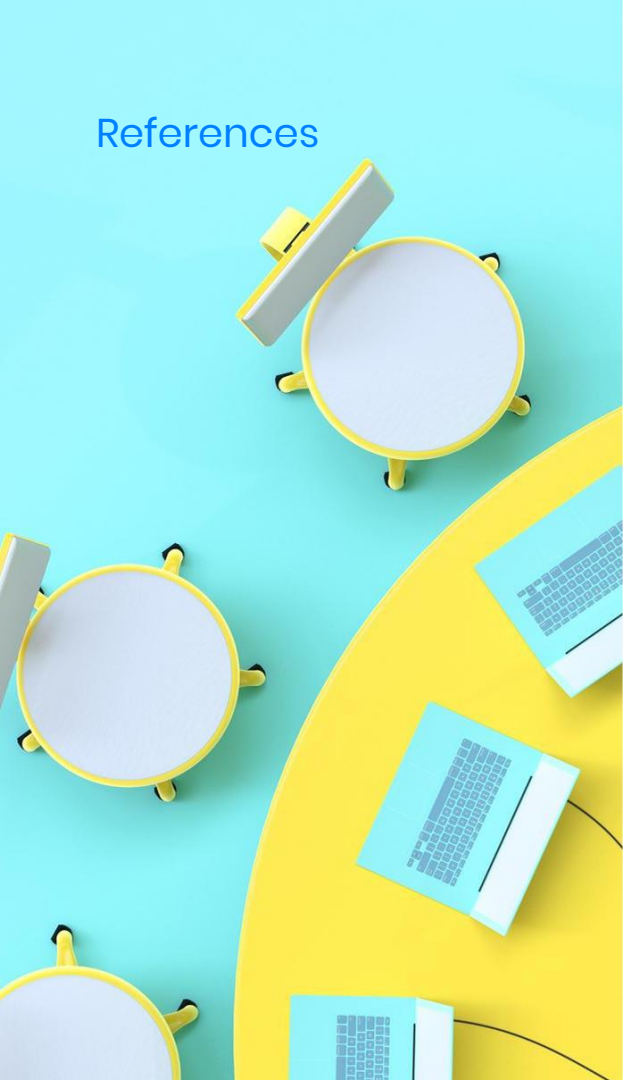

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Thank you.

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