

# Kids on the Go:

## Mobile Usage by US Teens and Tweens

Results from the Q3 2007  
Study

## Report Overview

- Nielsen Mobile's *Kids on the Go* report measures mobile adoption and cross media behavior for the 8- to 12-year-old tween segment
- *Kids on the Go* is designed to:
  - Size and track the mobile tween market opportunity
  - Understand how tweens engage with mobile and wired media
  - Assess tween and teen penetration and usage of mobile data services
  - Quantify operator share, monthly spend and payment plan selection
  - Examine tween and mobile tween reach for media brands

# Survey Methodology

## Kids on the Go Survey Sample Plan

**Target:** population age 8 and older

**Sample frame:**

- All eligible members of BASES US e-Panel (roughly 79,500 households)
  - 71,100 Adults
  - 4,200 Parents of teens age 13–17 (for their teen to complete)
  - 4,200 Parents of tweens age 8–12 (for their child to complete)
- Teen interviews were unassisted; tween interviews were paired with an adult panelist

**Timing:** Field start date: 8/1/07 – Field end date: 9/4/07

**Total Sample:**

- 54,381 Adults (76% participation rate)
  - Adult with child age 6–12: 8,614
  - Adult with child age 6–12 with own mobile phone: 1,417
- 2,716 Parents of teens 13–17 (66% participation rate)
- 2,925 Parents of tweens 8–12 (70% participation rate)

**Tween Sample: 2,925**

- Boys 1,493
- Girls 1,432
- Age 8-10: 1,842
- Age 11-12: 1,083

**obile Tween Sample: 1,032**

- ickelodeon: boys 268/girls 286
- isney: boys 220/girls 341

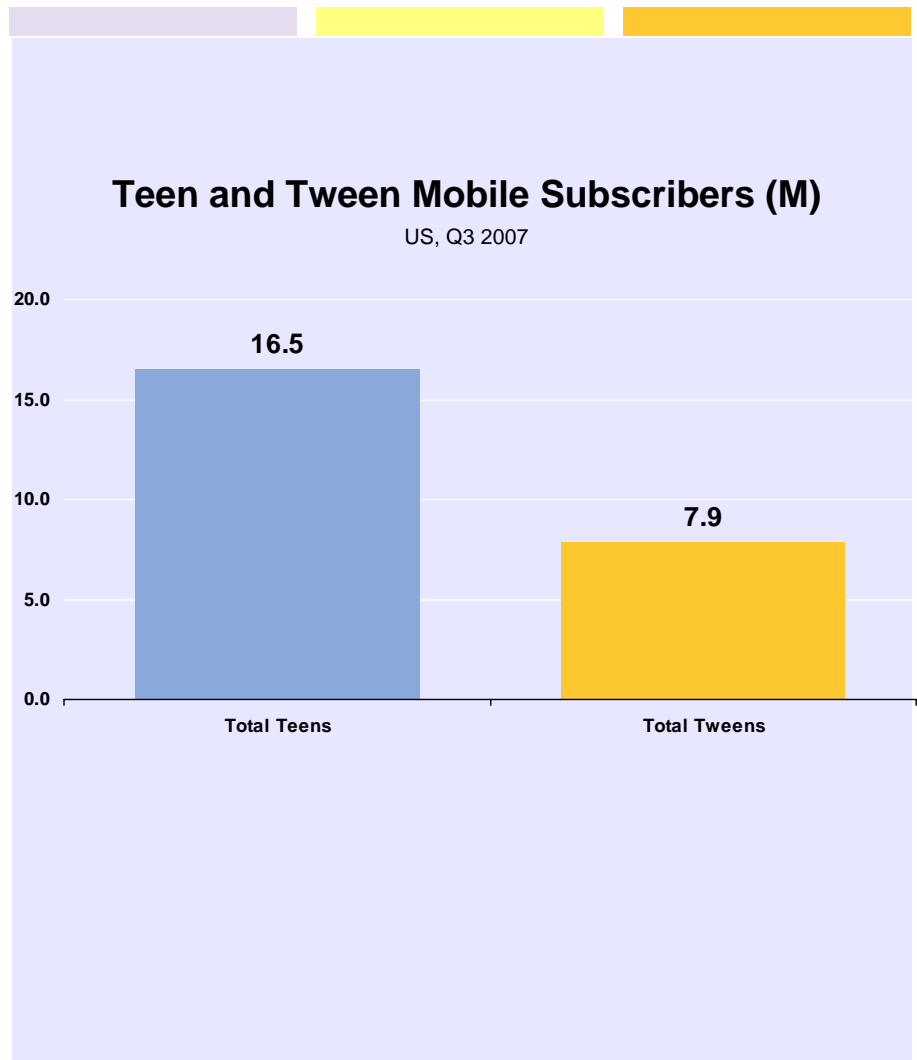
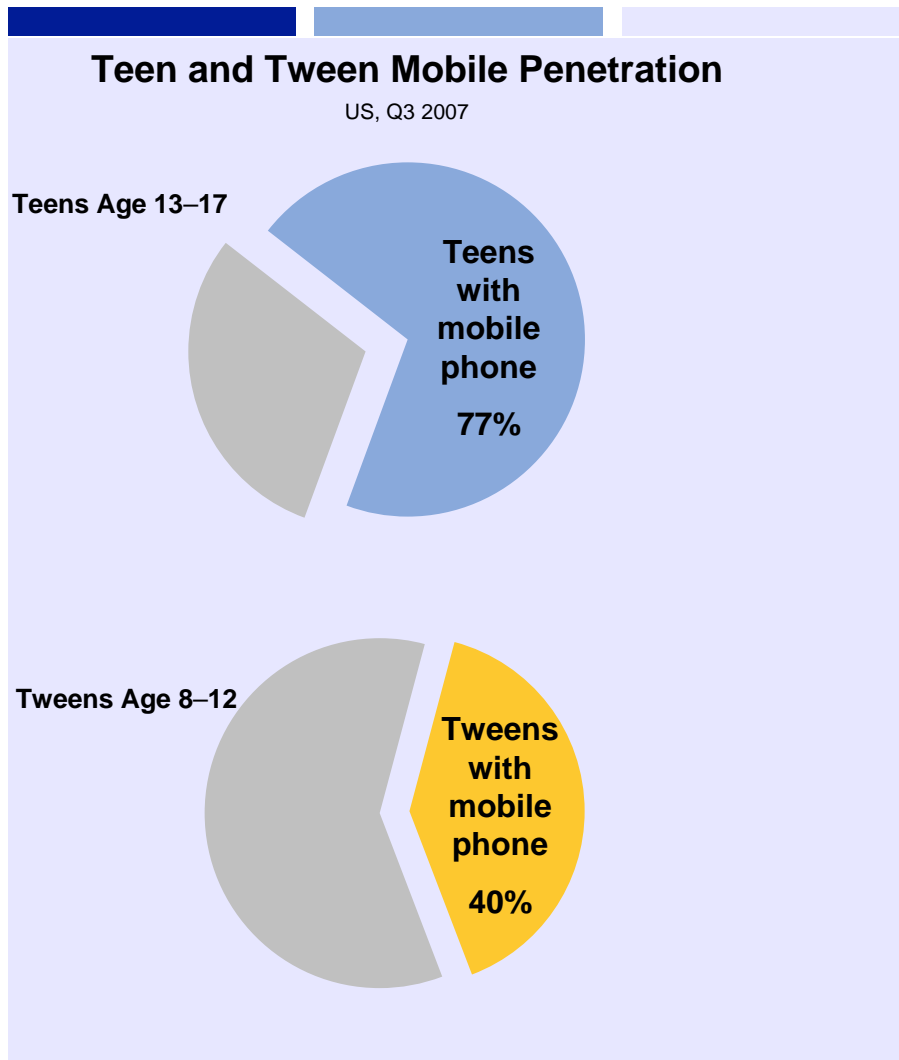
## Segment Definitions

Segment	Definition
<b>Teen</b>	Respondent age 13–17 <ul style="list-style-type: none"> <li>• Survey completed by teen unassisted</li> </ul>
<b>Tween</b>	Respondent age 8–12 <ul style="list-style-type: none"> <li>• Paired survey—adult panelists sitting with his/her child</li> <li>• Also reported by gender and age group</li> </ul>
<b>Mobile tween</b>	Respondent age 8–12 owns mobile phone with a calling plan or family calling plan
<b>Tween branded content viewers</b>	Respondent age 8–12 reports that Brand X is one of his/her five most-watched television channels. In this study Nickelodeon, Disney, Cartoon Network and ABC Family viewers are examined in detail.
<b>Adult with child age 6–12</b>	Adult respondent with one or more children age 6–12 in household
<b>Adult with child age 6–12 Child owns mobile phone</b>	Adult respondent with one or more children age 6–12 in household who reports his/her 6- to 12-year-old has his/her own mobile phone

## Summary

- **40% of tweens have a mobile phone**
  - 7.9 million 8- to 12-year-olds generate over \$300 million in revenue every month for mobile operators
  - 59% of tweens are on family plans, 42% are prepaid users
  - Tweens spend an average of \$5.50 per month on data charges
    - Having a mobile tween increases adult text messaging adoption by 58%
  - Grade school is the critical age to win new subscribers—by the time kids reach high school, 77% already own a phone
- **Mobile tweens use mobile applications at rates approaching teens**
  - More tweens use ringtones (60% vs. 54% teens) and play mobile games (30% vs. 25% teens)
  - Tweens use mobile features at home, indicating that the phone is evolving into a home entertainment device for this segment
- **Tweens spend significantly less time on the internet than teens**
  - 48% of tweens spend less than an hour a day online; 49% of teens spend more than 2 hours a day
  - Gaming is the most popular internet activity for tween boys and girls
  - Only 14% of tweens participate in social networking vs. 48% of teens

# 40% of tweens own a mobile phone, representing 7.9M mobile subscribers in Q3 2007

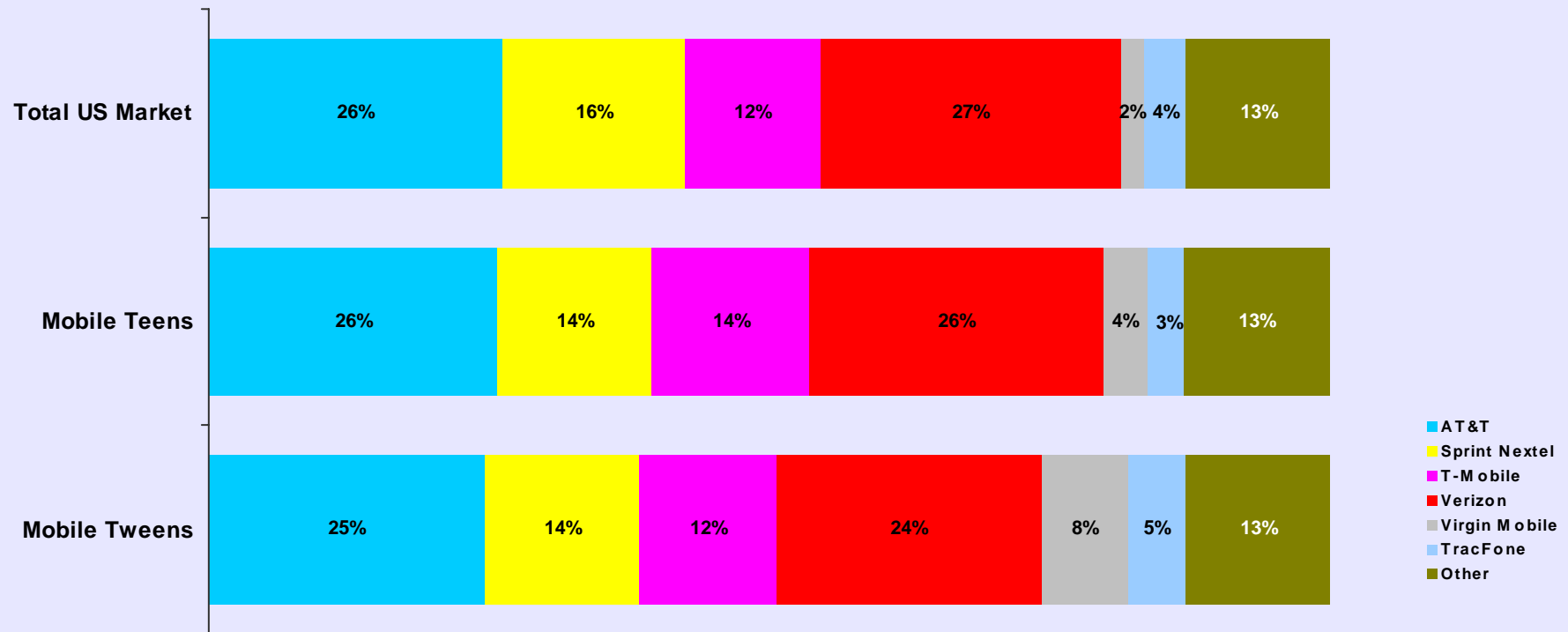


Source: Nielsen Mobile Q3 2007 Telecommunications Attitude and Behavior Survey (TABS)

# Virgin Mobile has strength within the mobile Tween market

## Mobile Operator Share of Teen and Tween Segments

US, Q3 2007



TracFone and Virgin Mobile are more successful with tweens than teens.

AT&T, T-Mobile and Verizon share of teen segment is slightly higher than their tween share.

Source: Nielsen Mobile Q3 2007  
Telecommunications Attitude and  
Behavior Survey (TABS), Mobile  
Media Survey and Online Bill Panel

# 42% of mobile tweens have prepaid plans; penetration of family plans increases to 70% for teens



## Reported Mobile Phone Plan Type

US, Q3 2007

		Teens	Tweens
<b>Incidence in population</b>		77%	40%
		Mobile Teens (N=2,273)	Mobile Tweens (N=1,032)
<b>Prepaid and postpaid plans</b>	Postpaid phone service	70%	59%
	Prepaid phone service	31%	42%
<b>Part of a family plan</b>		70%	57%

Tweens are more likely to have a prepaid mobile phone plan and not be part of a family plan vs. teens.

Tweens on Family plans spend \$28/month vs. \$33/month for Prepaid tweens; Data charges (\$6 vs. \$5); Download charges (\$1 each)

Source: BASES Q3 2007, Nielsen Mobile Q3 2007 Telecommunications Attitude and Behavior Survey (TABS), Mobile Media Survey and Online Bill Panel

Q: Which of these can describe the cellular phone that you use most often?

# One in five US Tweens are using text messaging and ring tones



## Mobile Feature Usage by Teen and Tweens (%)

US, Q3 2007

	Total Teens (N=2,716)	Total Tweens (N=2,925)	Mobile Tweens (N=1,032)
Text messaging	61%	20%	56%
Ring & answer tones	54%	21%	60%
Picture/video messaging	34%	11%	30%
Download wallpapers and screensavers	30%	9%	26%
Download or play video games	25%	11%	30%
Download and play music	23%	7%	21%
Voice dialing	19%	6%	18%
Internet access (web browsing/searching)	18%	6%	16%
Ability to access email	14%	4%	11%

Texting and ring/answer tones are the most popular features for teens and tweens

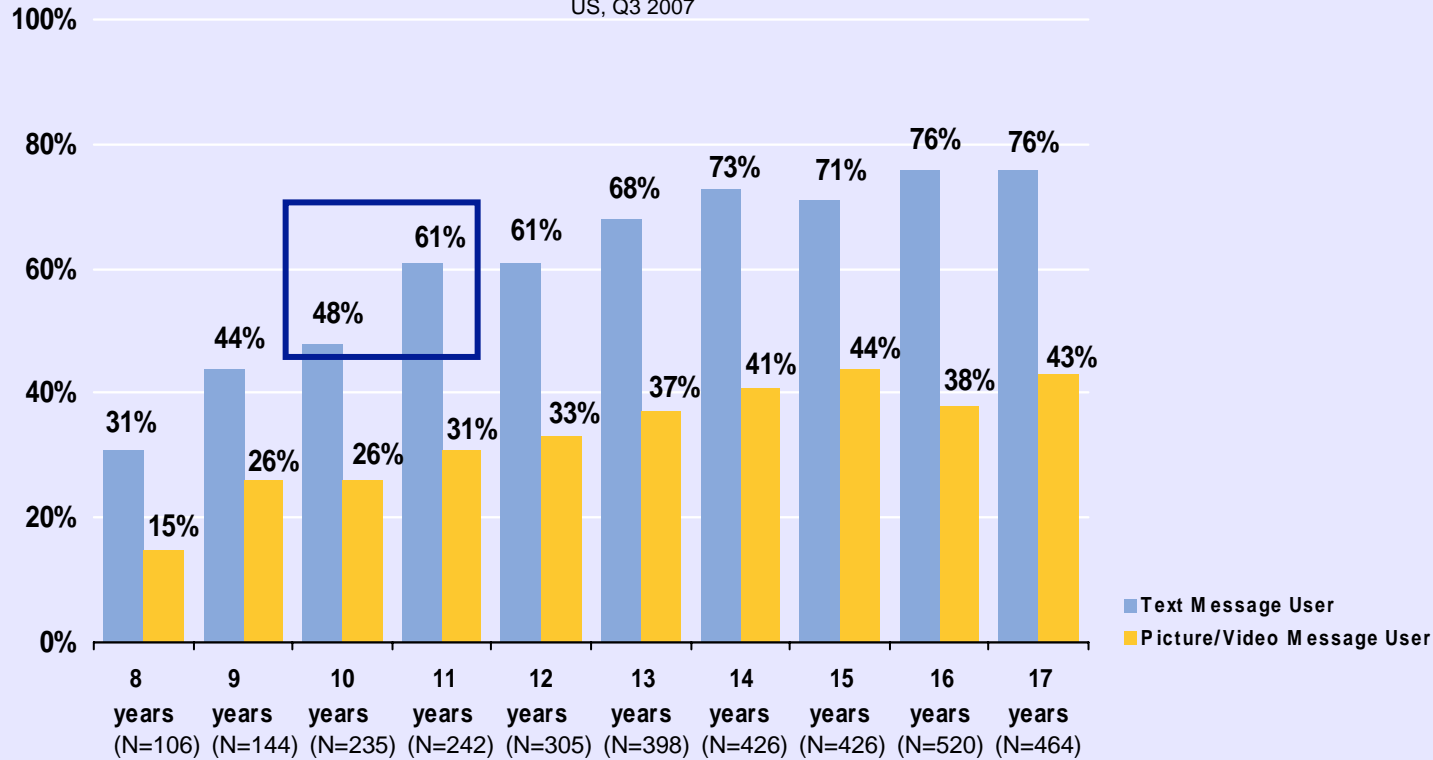
Source: BASES Q3 2007

Q: How often do you use the following services or features on your cellular phone? Choose as many as apply.

# Mobile messaging adoption grows steadily with age

## Mobile Teen and Tween Messaging Feature Penetration by Age (%)

US, Q3 2007



Texting penetration increases from 48% to 61% between grade school and junior high (10 vs. 11 years old) reflecting an increase in mobile phone ownership with older tweens.

Picture/video (MMS) messaging penetration is 56% of text messaging for teens.

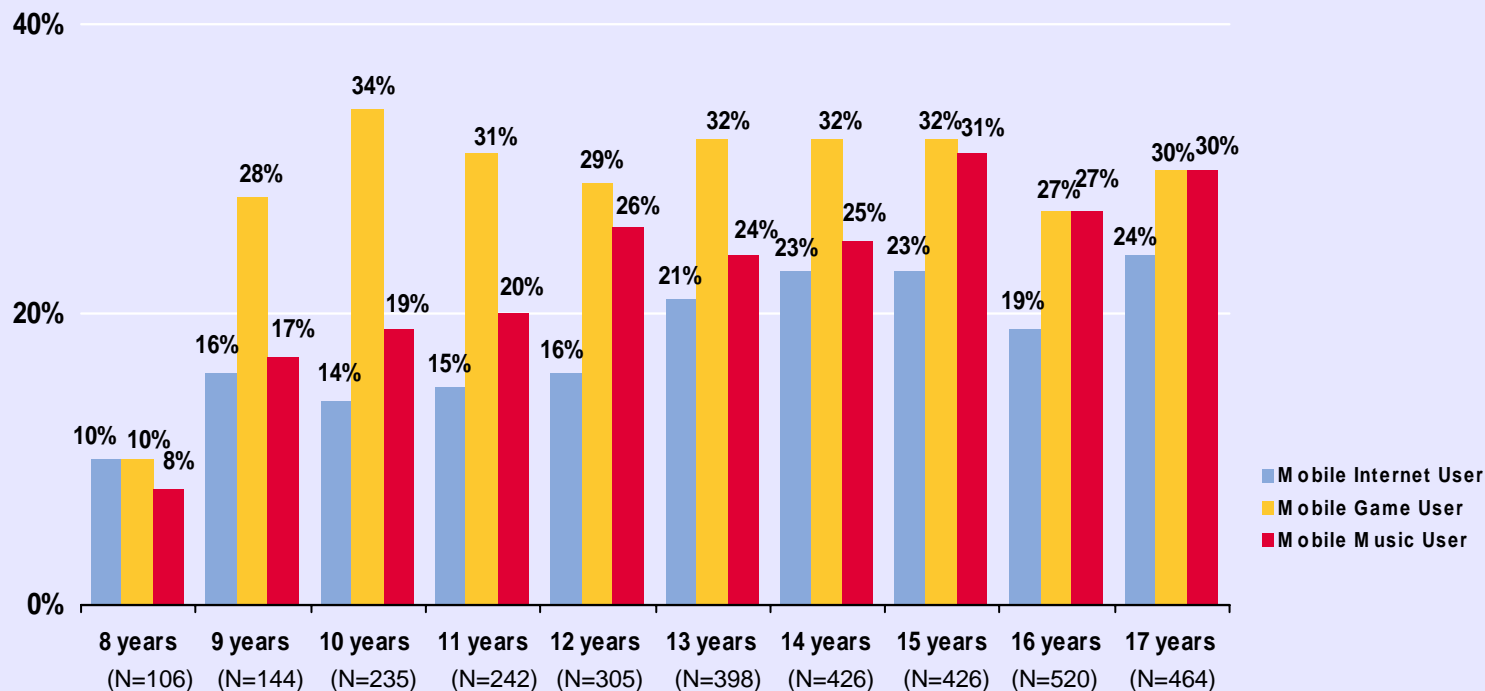
Source: BASES Q3 2007

Q: How often do you use the following services or features on your cellular phone? Choose as many as apply.

# Age 9 is a critical age of adoption for non-messaging mobile features, especially gaming

## Mobile Teen and Tween Entertainment Feature Penetration by Age (%)

US, Q3 2007



Mobile gaming has a much faster adoption rate for tweens than mobile internet and music. Gaming penetration remains higher until age 15.

Mobile music adoption occurs more gradually.

Mobile internet penetration increases to over 20% for mobile teens at age 13.

Source: BASES Q3 2007

Q: How often do you use the following services or features on your cellular phone? Choose as many as apply.

# Mobile data feature usage by mobile tweens varies slightly between channel viewers



## Mobile Feature Usage by Mobile Tween Branded Content Viewers (%)

US, Q3 2007

	Mobile Tweens								
	Total Tweens (N=1,032)	Nickelodeon Boys (N=268)	Nickelodeon Girls (N=286)	Disney Boys (N=220)	Disney Girls (N=341)	Cartoon Network Boys (N=286)	Cartoon Network Girls (N=224)	ABC Family Boys (N=85)	ABC Family Girls (N=156)
Text messaging	56%	55%	57%	56%	56%	56%	57%	53%	62%
Ring & answer tones	60%	62%	65%	61%	64%	61%	64%	58%	62%
Picture/video messaging	30%	28%	31%	27%	32%	30%	33%	33%	28%
Download wallpapers and screensavers	26%	29%	28%	27%	24%	26%	29%	27%	21%
Download or play video games	30%	35%	29%	36%	26%	35%	33%	38%	22%
Download and play music	21%	25%	16%	24%	17%	24%	22%	24%	21%
Voice dialing	18%	14%	17%	15%	18%	15%	17%	19%	16%
Internet access (web browsing/searching)	16%	16%	14%	17%	11%	16%	16%	16%	12%
Ability to access email	11%	11%	10%	10%	8%	12%	13%	8%	7%

Source: BASES Q3 2007

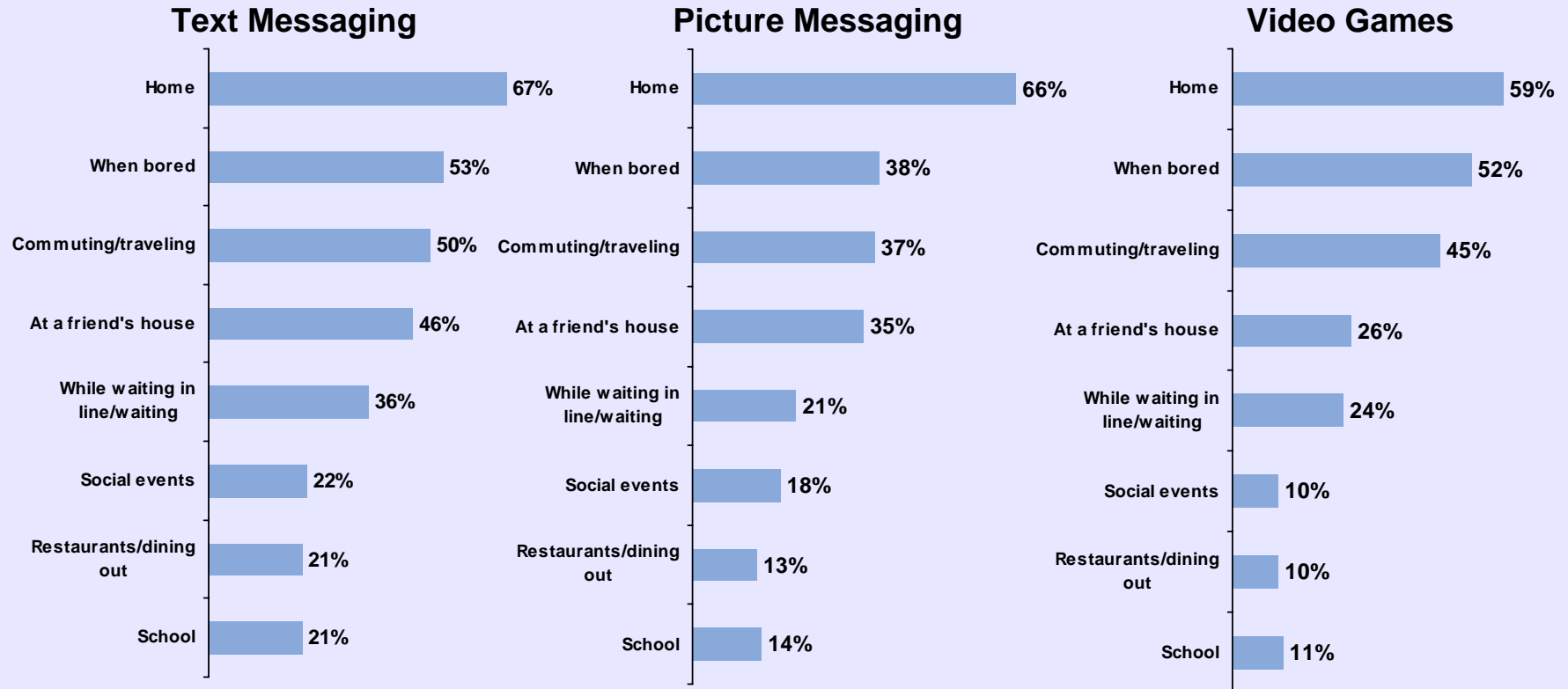
Q: How often do you use the following services or features on your cellular phone? Choose as many as apply.

Q: Please look over the entire list of network and cable channels and choose up to five channels you spend the most time watching.

# Mobile tweens use mobile features at home and when bored

## Top Locations of Mobile Feature Use, Mobile Tweens (%)

US, Q3 2007



Base: SMS N=578; MMS N=312; Video N=308

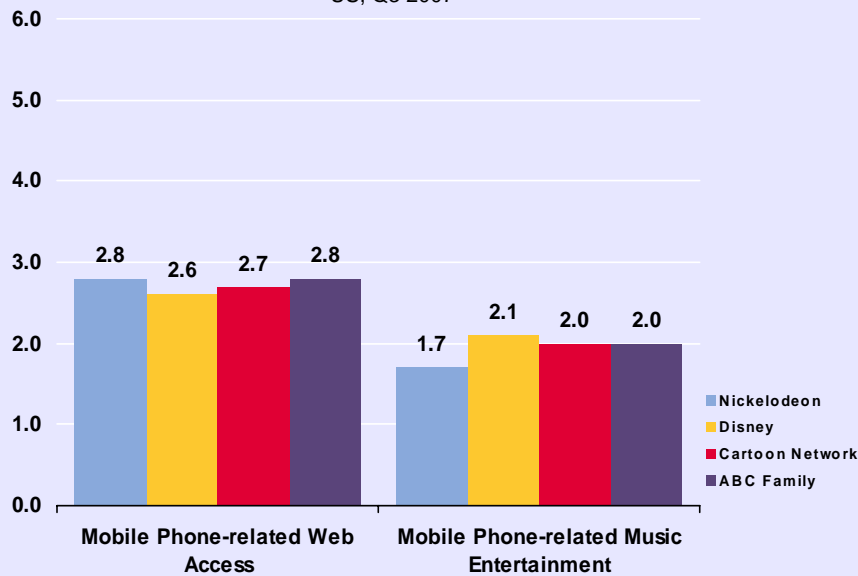
Source: BASES Q3 2007

Q: Where do you use the following cellular phone services or features?

# Mobile tween girls consume more mobile-related content than boys

## Mobile Tween Boys: Mobile-related Leisure Activities (Hours/Week)

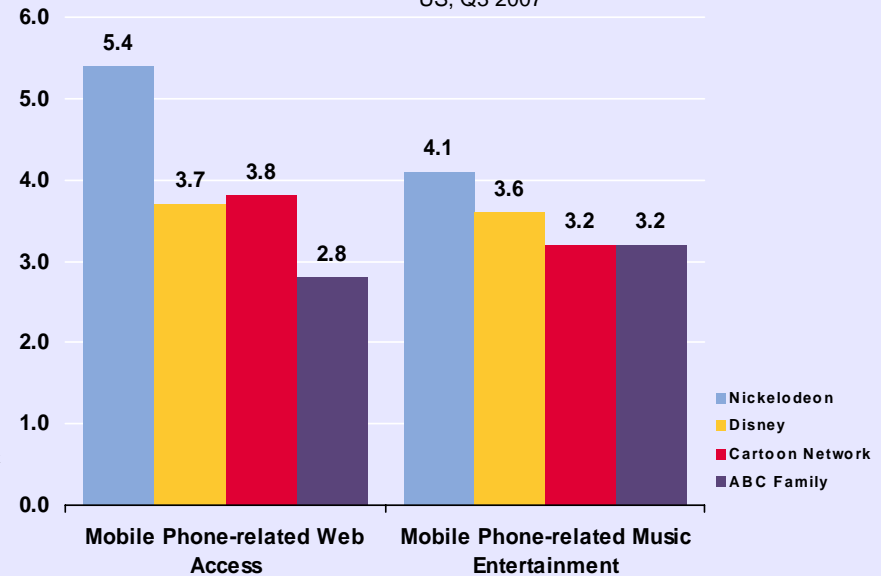
US, Q3 2007



Mobile tween boys spend more time on mobile-related web access than mobile music-related activities, especially boys that are Nickelodeon viewers.

## Mobile Tween Girls: Mobile-related Leisure Activities (Hours/Week)

US, Q3 2007



Mobile tween girls who are Nickelodeon viewers are engaged with mobile content more than other brand viewers.

Base: Nickelodeon boys/girls N=268/286; Disney boys/girls N=220/341; Cartoon Network boys/girls N=286/224; ABC Family boys/girls N=85/156

Source: BASES Q3 2007

Q: Please look over the entire list of network and cable channels and choose up to five channels you spend the most time watching.

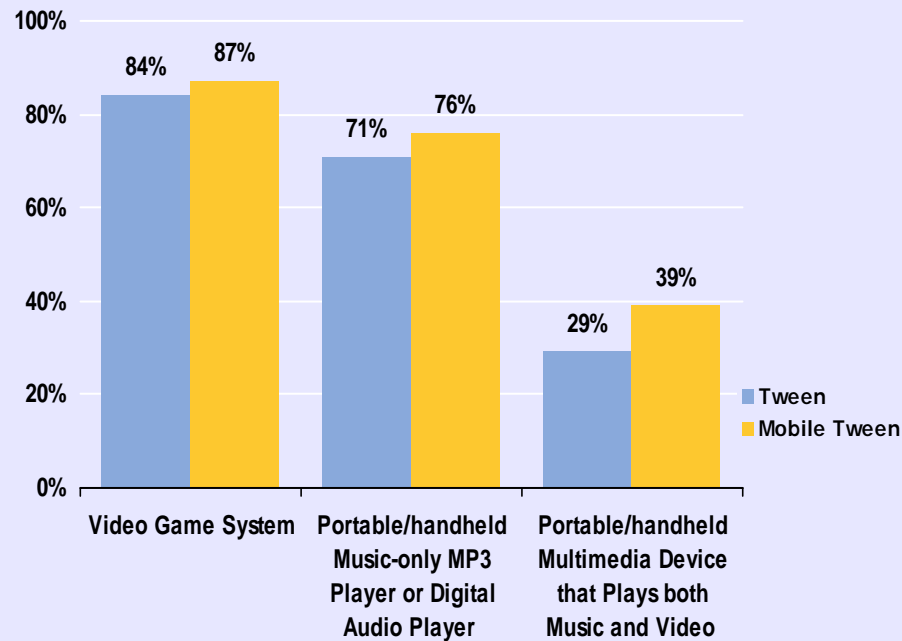
Q: How many hours a day, if any, do you spend on [ ]?

# Teen and Tween Media Usage

# Mobile tweens live in households with a variety of consumer electronics equipment

## Household Consumer Electronics Device Penetration (%)

US, Q3 2007



Tweens who own a mobile phone are more likely to have video game systems, MP3 players and music/video handheld devices in their households.

Base: Total tweens N=2,925; Tween mobile phone owners N=1,032

Source: BASES Q3 2007

Q: Which of the following equipment do you own or have in your household? Choose as many as apply.

# Teens spend more time than tweens on music and messaging; Mobile messaging use is greater among tween girls and older tweens



## Average Time (in Hours) Spent On Leisure Activities Per Week

US, Q3 2007

	Teens Total Teens (N=2,716)	Tweens				
		Total Tweens (N=2,925)	Boys (N=1,493)	Girls (N=1,432)	Age 8–10 (N=1,842)	Age 11–12 (N=1,083)
Watching regular TV	10.2	9.9	9.9	9.9	9.6	10.4
Listening to CDs, MP3s or other forms of music	8.6	4.5	4.1	4.8	3.8	5.6
Playing video games on a console, handheld or PC	7.0	6.0	7.3	4.6	5.9	6.2
Sports or exercise activities	6.2	6.0	6.4	5.5	5.9	6.2
Mobile phone-related messaging	5.8	3.1	2.6	3.6	2.4	3.7
Non-media related activities at home	4.6	5.1	5.0	5.2	5.4	4.7
Activities such as dining out, shopping, going to a park, museum or beach	4.6	4.2	4.2	4.3	4.2	4.3
Watching feature films on DVD or video	4.6	4.0	3.8	4.1	3.9	4.0
Watching subscription/premium TV	4.6	3.1	3.0	3.3	3.0	3.3
Reading magazines, books or newspapers	4.1	4.2	3.9	4.4	4.3	3.9
Mobile phone-related web access	3.9	3.2	2.8	3.7	3.1	3.3
Mobile phone-related video entertainment	3.1	2.3	2.1	2.6	2.4	2.3
Mobile phone-related music entertainment	2.4	2.7	1.9	3.4	2.6	2.7

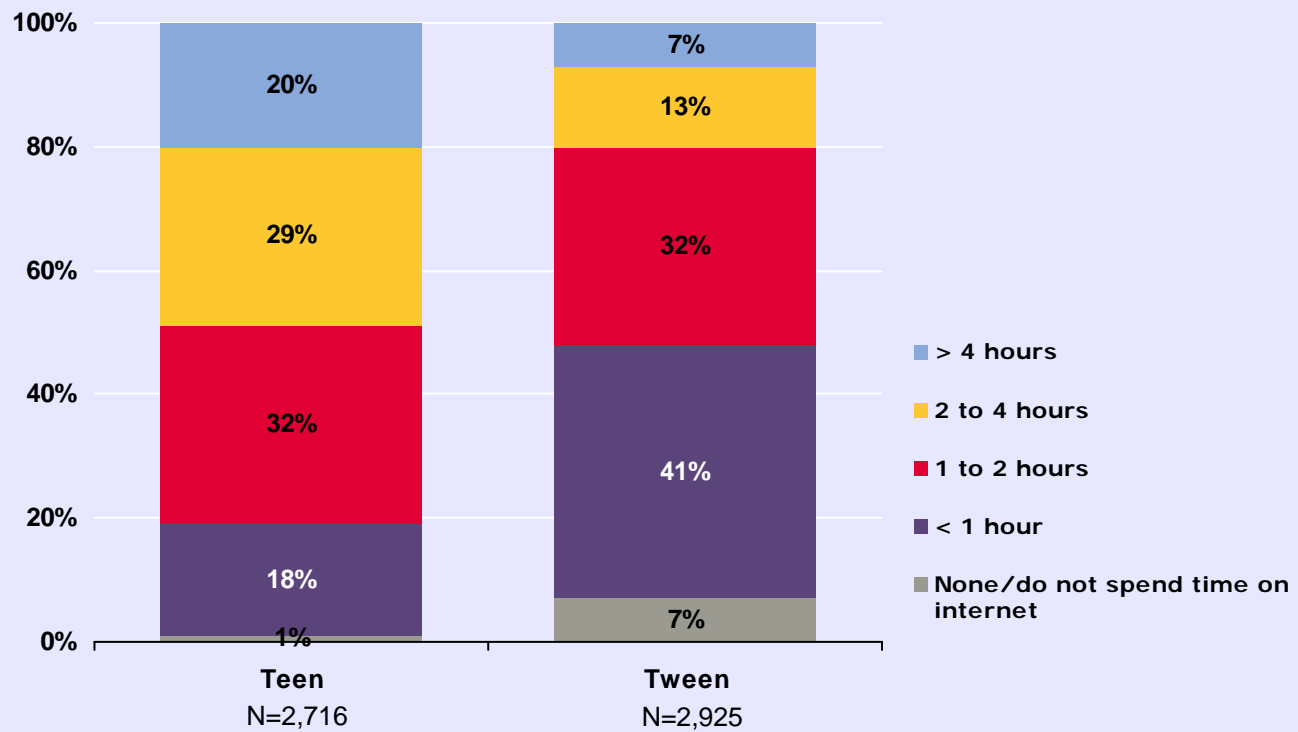
Source: BASES Q3 2007

Q: How many hours a day, if any, do you spend on [ ]?

# 81% of teens and 52% of tweens spend at least an hour online daily

## Teen and Tween Time Spent on the Internet Per Day

US, Q3 2007



Source: BASES Q3 2007

Q: How many hours a day, if any, do you spend browsing or surfing the internet, excluding e-mail?

# Tweens spend the majority of their time online gaming; In general, mobile tweens are more active online than non-mobile tweens



## Teen and Tween Online Activities (%)

US, Q3 2007

	Teens Total Teens (N=2,716)	Tweens					
		Total Tweens (N=2,925)	Boys (N=1,493)	Girls (N=1,432)	Age 8-10 (N=1,842)	Age 11-12 (N=1,083)	Mobile Tweens (N=1,032)
Email	71%	37%	31%	43%	29%	51%	55%
Instant Messaging	55%	19%	15%	24%	12%	32%	35%
Web Surfing	54%	31%	31%	31%	26%	39%	43%
Music	54%	29%	24%	34%	23%	40%	43%
Gaming	53%	70%	73%	68%	72%	67%	67%
Social Networking	48%	14%	12%	15%	9%	23%	26%
Research	42%	28%	27%	29%	22%	37%	36%
Viewing Videos	37%	20%	21%	19%	17%	26%	29%
Chat Rooms/Forums	25%	8%	6%	10%	6%	11%	15%
Shopping	24%	11%	10%	11%	9%	13%	19%
News	18%	7%	8%	7%	7%	9%	14%
Blogging	17%	4%	3%	5%	3%	5%	8%

Source: BASES Q3 2007

Q: Which of these activities do you use the internet for?

**Mobile tweens adopt teen internet habits earlier.  
Tween girls participate in more diverse online activities than boys.**

# Disney is the top tween website; Google, MySpace and YouTube are top sites for teens

## Teen and Tween Website Visits (%)

US, Q3 2007

	Teens Total Teens (N=2,716)	Tweens				
		Total Tweens (N=2,925)	Boys (N=1,493)	Girls (N=1,432)	Age 8–10 (N=1,842)	Age 11–12 (N=1,083)
Google	70%	44%	43%	44%	36%	56%
MySpace	64%	19%	19%	20%	12%	31%
YouTube	63%	33%	34%	32%	26%	45%
Yahoo	57%	31%	30%	33%	26%	40%
eBay	39%	20%	22%	18%	17%	24%
Wikipedia	29%	15%	16%	14%	12%	21%
Amazon	28%	13%	14%	12%	11%	16%
MapQuest	26%	8%	8%	7%	5%	11%
MSN	23%	10%	10%	9%	7%	13%
Disney	22%	59%	49%	69%	61%	54%
AOL	22%	11%	9%	13%	8%	15%
Ask	21%	11%	11%	11%	8%	16%
Facebook	21%	4%	3%	5%	3%	7%

As kids get older, they visit a wider variety of websites.

Tweens (especially girls) are highly likely to visit Disney.com.

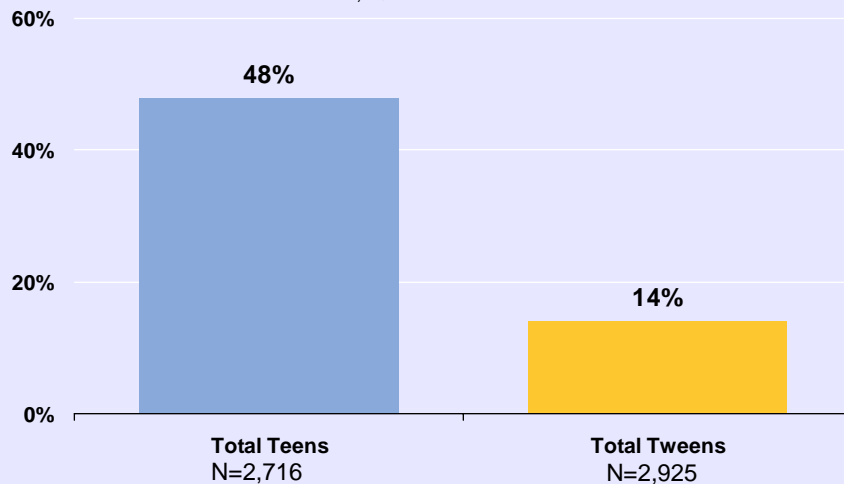
Source: BASES Q3 2007

Q: Which of these websites have you visited in the past 12 months?

# 48% of teens participate in online social networking vs. 14% of tweens

## Teen and Tween Participation in Social Networking

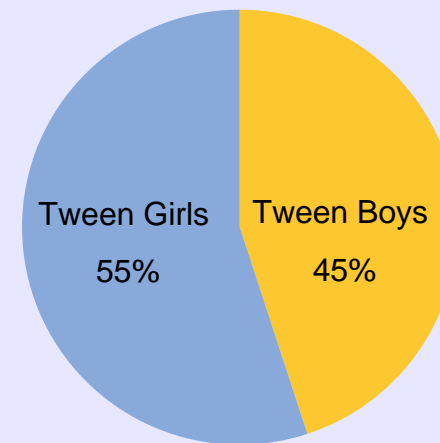
US, Q3 2007



Teens are 3x more likely to participate in online social networking vs. tweens.

## Gender of Tween Social Networkers

US, Q3 2007



A higher proportion of tween girls are members of social networking sites

## Social Networking Site Registration/Membership (%)

	Total Teens (N=1,293)	Total Tweens (N=403)	Boys (N=183)	Girls (N=220)
MySpace	90%	78%	82%	74%
Facebook	28%	15%	14%	16%

Source: BASES Q3 2007

Q: Which of the following activities do you use the internet for? Choose as many as apply.

Q: For which of these social networking sites are you a member or registered user?

# Nickelodeon has the highest viewership with young tweens (8- to 10-year-olds)

## Tween Channel Viewing by Gender and Age Group (%)

US, Q3 2007

	Tweens				
Incidence in population of TV viewers	99%	51%	49%	62%	37%
	Total Tweens (N=2,899)	Boys (N=1,478)	Girls (N=1,421)	Age 8-10 (N=1,824)	Age 11-12 (N=1,075)
Cartoon Network	56%	64%	47%	59%	51%
Disney Channel	60%	53%	68%	62%	57%
Nickelodeon	64%	64%	63%	68%	56%
Discovery Channel	26%	32%	20%	26%	26%
ABC Family	22%	17%	27%	21%	23%
Animal Planet	27%	26%	29%	28%	27%

Cartoon Network and Discovery Channel skew toward boys, Disney and ABC Family toward girls.

Animal Planet viewership is consistent across age and gender.

Source: BASES Q3 2007

Q: Which network and cable channels do you spend the most time watching? (up to 5 channels)

# Adults with Child 6–12 Segment Insights

# Adults with mobile tweens report higher household income



## Household Demographic Summary

US, Q3 2007

	Adults with Children 6–12	
Incidence in population	16%	3%
	Total (N=8,614)	Child has Mobile Phone (N=1,471)
<b>Mean Household Size</b>	4.4	4.2
<b>Household Composition</b>		
<b>Household Income</b>		
Under \$35,000	15%	13%
\$35,000-\$49,000	16%	17%
\$50,000-\$74,999	26%	26%
\$75,000-\$99,999	21%	20%
\$100,000+	21%	25%
<b>Mean Family Income</b>	\$82.9K	\$89.6K
<b>Race/Ethnicity</b>		
Caucasian/White	67%	63%
Black/African-American	12%	15%
Hispanic	10%	14%
Asian	9%	8%
Other	6%	6%

Relative to households composed of non-mobile owning tweens, parents of tween mobile phone owners generate relatively higher income, are racially more diverse and have slightly smaller households.

Source: BASES Q3 2007

# Mobile tween parents are more interested in mobile TV /video than other tween parents although a majority of parents aren't on-board (78% aren't willing to pay more)



## Interest in Mobile TV and Willingness to Pay – Adults with Tween Children (%)

US, Q3 2007

Incidence in population	Adults with Children 6-12			
	Want to be able to watch TV or video on mobile phone		Willing to pay more for the device and services needed to watch TV or video on mobile phone	
	16%	3%	16%	3%
	Total (N=8,614)	Child has Mobile Phone (N=1,471)	Total (N=8,614)	Child has Mobile Phone (N=1,471)
<b>Top-Two Box (Net)</b>	17%	25%	11%	17%
Agree Completely	7%	12%	4%	8%
Agree Somewhat	10%	13%	7%	9%
Neither Agree Nor Disagree	12%	12%	10%	11%
Disagree Somewhat	11%	10%	11%	12%
Disagree Completely	60%	54%	67%	60%

While parents of tweens are not highly interested in mobile TV/video, those whose tweens own a mobile phone demonstrate stronger interest.

More than half of adults with tweens are negative toward mobile TV/video.

Source: BASES Q3 2007

Q: How much do you agree or disagree with the statement...?

# Appendix

## About This Report

- **Data Sources**

- Survey sample from BASES US e-Panel panelists
  - All eligible members of BASES US e-Panel (roughly 79,500 households) were invited to participate in the *Kids on the Go* survey
  - BASES has extensive experience interviewing children and follows strict guidelines considering attention span, comprehension and other factors of the age group
  - Tween interviews were paired with an adult panelist who sat with the child. This practice results in 65% average participation rate. Adult and unassisted teen interviews were also conducted within the survey.
  - The *Kids on the Go* survey was fielded online from August 1 to September 4, 2007
- Additional data was supplied from Nielsen Mobile's *Online Bill Panel* of more than 40,000 mobile lines and the third-quarter survey results from Nielsen Mobile's *Telecommunications Attitude and Behavior Survey (TABS)* and *Mobile Media Survey*

- **Weighting**

- Teen and tween data from the survey is unadjusted (consumer claims, not weighted to any standard demographic profiles)
- Adult data is also claimed, but is weighted to US Census household demographics