

DECODING TEENAGE MEDIA + INTERNET TRENDS

*Scribbles From Our DECODE Intern
a response to the Morgan Stanley Report:
How Teenagers Consume Media*



DECODE

DECODING YOUTH, YOUNG ADULTS
AND YOUNG FAMILIES

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INTRODUCTION

On July 10th Morgan Stanley released a report on teenage media and internet consumption habits in the UK. The report made headlines because it was produced by Matthew Robson, their 15 year old intern. Matthew relied primarily on his observation of peers to reach his conclusions. He included a number of interesting insights that opened up a debate about youth media consumption in the UK. We have collected the following insights to explore Matthew's observations in relation to our own knowledge and quantitative data. In January 2009, DECODE conducted a 3- country study on the attitudes and behaviours of young people in the UK, Canada, and the U.S. Since DECODE's intern Ben Doherty has been analysing this data for the past two months, we asked him to ponder the original report and offer and response. Here it is.

RADIO

Although radio may seem to be a less popular form of media, our data shows that 54% of teenagers listen to the radio at least once a week, a number that is a lot higher than is generally assumed. This is even more surprising considering little broadcasting is actually targeted at teenagers, with almost all shows being targeted at people aged 20 and up.

Teenagers prefer using digital radios as they operate in a format that they are more familiar with and find easier to use. Despite this teenagers don't tend to listen to the radio on the internet, suggesting that it is more because of the content than the medium.

Teenagers are more likely to listen to the radio in the morning as it is quick and they can put it on in the background when they are getting ready for school but don't at all in the afternoon when they have more time to commit to leisure activities. Recording music off the radio is a thing of the past.

TELEVISION

DECODE'S data supports the fact that most teenagers watch TV regularly, with 92% saying they do so more than once a week. This depends on whether or not certain programmes are showing because teenagers have a lot of choice so are not stuck watching programmes they aren't interested in. If there is nothing on then they will watch a film or play on a games console.

The BBC is considered a popular brand as 53% of teenagers have particularly positive feelings about it. Other channels that more specifically target young people have lower results suggesting that young people are still most attracted to traditional sources of TV.

TV recording boxes are starting to have an impact with 34% of teenagers reporting using them at least once a week. This is a surprisingly high figure because of the cost of these services and shows that young people are getting used to having more choice about when they watch their favourite programmes.

In reality adverts don't turn teens off TV. Teenagers are so used to adverts that they have learnt to blank them out and if they get too much they always have the option to channel hop. Because teenagers don't really notice adverts on TV they don't really find them annoying. They also don't really talk about adverts with friends but are most likely to like them if they are funny.

The majority of teens have TV's in their rooms and if they don't it's because their parents are too strict. People rarely have TV's in their kitchens. Most people I spoke with said they watch films with their friends and TV on their own. Teens only watch TV with their family if they don't have a choice and that is almost never.

Teens tend to have Freeview boxes as Virgin and Sky are considered too expensive. There are likely to be regional differences as I think it is easier to get Virgin in London so it is more common.

NEWSPAPERS

Our data seems to go against the idea that young people don't read newspapers. 39% of teenagers read printed newspapers at least once a week. This figure is higher than the 29% that read free printed newspapers although this could be due to availability.

People I have spoken to seem to suggest that they are more likely to buy a tabloid although not on a regular basis. Some people bought a newspaper when they heard that Michael Jackson died because they wanted to know more but normally they don't care about the details. Teens are also most interested in the sports section of newspapers although will not buy one regularly for this reason.

A small portion of the people I spoke to would buy magazines. Boys buy gaming magazines because they feel that is the only type that is aimed at them and girls like to be updated on celebrity gossip. Our data showed that on average teenagers spend just over half an hour a day reading newspapers, magazines or books.

Teenagers don't read newspapers daily, they tend to use them to check out stories they have heard about somewhere else.

GAMING

Gaming is popular although not completely widespread. A significant 42% of people play on games consoles less than once a week. On average 15-18 year olds play computer games for an hour and a half every day. Nintendo was one of the most popular brands with 53% of teenagers saying they had positive feelings about it.

Teenagers do play consoles for long stints. The consensus seemed to be that it was not worth gaming if it was for less than an hour. If they don't have enough time then they will do something else.

Playing interactively through an internet connection is the most popular form of gaming and is seen as a replacement for having a friend to the house. Chatting over the internet whilst playing on games consoles is very popular as it enhances the game by making it more realistic. Despite this it is not considered a replacement for a phone.

Teens don't play on PCs as it is considered nerdier and with less teens having computers in their rooms than games consoles they are less likely to be able to game in private which is important.

Teenagers I spoke to think that games are about the right price although only buy new ones every 1-2 months. Parents buy consoles as they are expensive and teens buy their own games out of their allowance as they are cheaper. Most teens have about 8 games and swapping

games is very popular in order to avoid having to buy new games when you are bored of your old ones. Teens tend to swap games with shops rather than with friends.

INTERNET

Most teenagers use the internet and most have access to it in private as they have computers in their rooms. Despite this 21% report using high speed internet less than once a week. That is a similar figure to the 23% who say they are only connected to the internet when absolutely necessary. Parents seem to have given up trying to monitor teenager's internet usage as they feel it is too widespread for them to control.

Social networking isn't as widespread as you report as almost 40% report using a social networking site less than once a week. This shows that social networking is important but not for everyone. On average teenagers communicate with almost 90 people on a monthly basis through the internet including email and social networking, making the internet central to their social lives. For those who do use social networking they use it a lot with teenagers spending on average around 2 hours online with friends each day.

Contrary to this, email and social networking are not the most popular ways to make dinner arrangements with only 9% of teenagers saying they would likely use social networking to make arrangements. Texting is most popular with over half (54%) choosing it as a likely option.

The internet is thought of as a place to connect with friends (71%) and to kill time (56%). Teenagers are least likely to think of the internet as a place to start relationships (8%) and get involved in making the world a better place (8%).

Music

Music is popular amongst young people as it doesn't require much attention so can be listened to whilst doing other things. 78% of teenagers say that music is of particular interest to them, being the 2nd most popular interest behind films.

Portable music is very popular with 73% of 15-18 year olds using an MP3 player at least once a week. Young people seem to be split over music downloading sites as it seems to be less widespread than is popularly believed with over 54% of teenagers saying they visit music streaming and downloading sites less than once a week.

Our data seems to challenge your notion that most young people download music illegally and never spend money on music as 54% of teenagers report paying for music most of the time.

CINEMA

Going to the cinema is a regular activity with 67% of 15-18 year olds going at least once a month. A lot less (23%) go at least once a week.

Films were the most popular interest amongst teenagers with a massive 78% saying they had a particular interest in films.

Cinema does seem to be a group activity with people I've spoken to saying they usually go with groups larger than 4. I am not so sure about young people going to the cinema less as

they get older as their income will increase making it easier to pay the increased price and increased freedom means they are able to go without their parents.

MOBILE PHONES

Teenagers use mobile phones on a regular basis with over 86% using a mobile more than once a week. They use mobile phones and landlines to communicate with a much more select group of people than on social networking sites with the average teen connecting with around 12 friends by phone a month. Despite being more select with their phones they spend on average an hour and 20 minutes using their mobile phones each day.

Mobile phones are considered the most popular way of making arrangements with friends with 54% saying they are likely to use text messaging (including msn) and 27% saying they are likely to use a mobile to arrange dinner plans with a friend. This is probably because mobile phones are a constant method of connection whereas social networking and regular telephones rely on people being in a fixed place.

ABOUT THE ARTICLE

The statistics referenced in the piece are drawn from a broader study: Decoding Young People's Media habits. This study was conducted through an online panel in the United Kingdom, United States and Canada in February 2009. The total sample of young people 15-39 years old was 1000 in each country. The teenage sample was approximately 200 people and should be considered directional. All the data quoted in this article is for the United Kingdom Only. This document also includes observations and assumptions made by Ben as a result of discussions with teenagers.

ABOUT BEN DOHERTY (BEN@DECODE.NET)

Ben recently graduated with a Politics degree from Queen Mary University in London. For the last two months he has been working at DECODE analyzing the attitudes and behavior of young people in the UK. He likes cycling and curry, although not at the same time. Ben is 21.

ABOUT DECODE

DECODE is a company devoted to building stronger relationships between organizations and youth, young adults and young families. For more than fourteen years, DECODE has used a unique approach to research, strategy and innovation to help its clients build and communicate better products and services, create better workplaces and build a better society. In addition to an expert team of strategists, DECODE utilizes a global network of young people who assist in generating insights and ideas. Based in Toronto, DECODE recently launched an office in London, England.

For more information about DECODE in London, England contact:

Robert Barnard, CEO

robert@decode.net

+44 (0)7933 014461