

Tween Media Usage

source:



A Corus™ Entertainment Inc. Company.



Research Objectives

- To profile a typical media day for English Canadian Tweens 7-12.
- To better understand how and how much Tweens are using different media.
- To find out where Tweens are getting their new product information.





Methodology

- Online surveys completed by 7-12 year olds and their parents
- Conducted by Solutions Research Group
- 419 surveys completed across English Canada
- Completed in September of 2006



Who are these “Tweens”?



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Kids, Tweens and Teens (oh my!)

KIDS = 6 – 11 year olds
(2 – 5 = preschoolers)



TWEENS = 9 – 14 year olds (7 – 12 yrs)
(overlap btw “kids” & “teens”)



TEENS = 12 – 17 year olds



“Youth” = Kids? kids & teens?
College-aged kids?
Who knows?!



A Closer Look at These Kids

- Approximately 2.5 million Canadian tweens (age 9 to 14)
 - 2.3 million kids 6-11 and 2.3 million kids 7-12
- Immersed in brand culture since birth
- Live in a fast paced, stimulated world
- Technologically astute
- Knowledgeable and confident
- Demand a say (& get one!)
- Key stakeholder in family decisions



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Tweens are... sophisticated & savvy

- **Most informed generation**
 - Immersed in brand culture
 - Knowledgeable
 - Discriminating consumer - value conscious
- **Opinionated**
 - Getting older younger
 - Independent - encouraged to make own decisions
 - Raised in households where decisions are made democratically and kids given more respect



Tweens are... technologically advanced

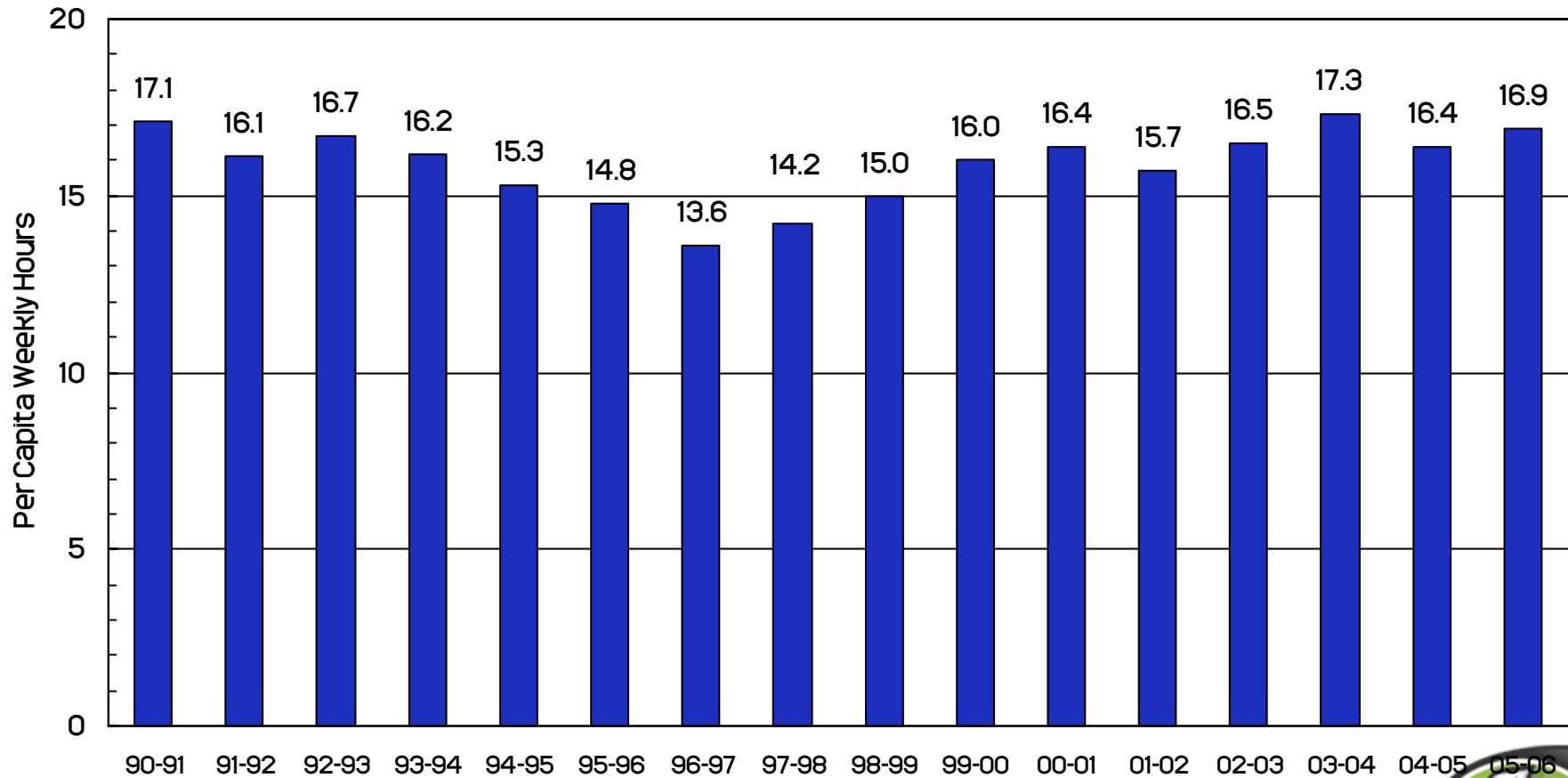
- **Media sponges**
 - Kids spend MORE time with MORE media than any generation ever
- **Raised on the Internet**
 - Technology (PC, Internet) has always been a part of their world
 - Most informed consumers ever
- **Technically astute**
 - Consulted by parents on computer hardware and software



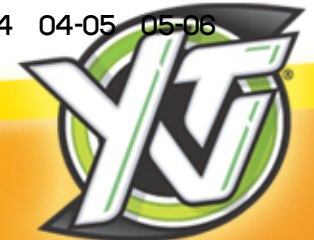
- **Given all of these factors, the rise of the Internet must mean TV usage is on the decline....right?**



Over the past 15 years, kids (K2-11) weekly hours tuned have remained stable

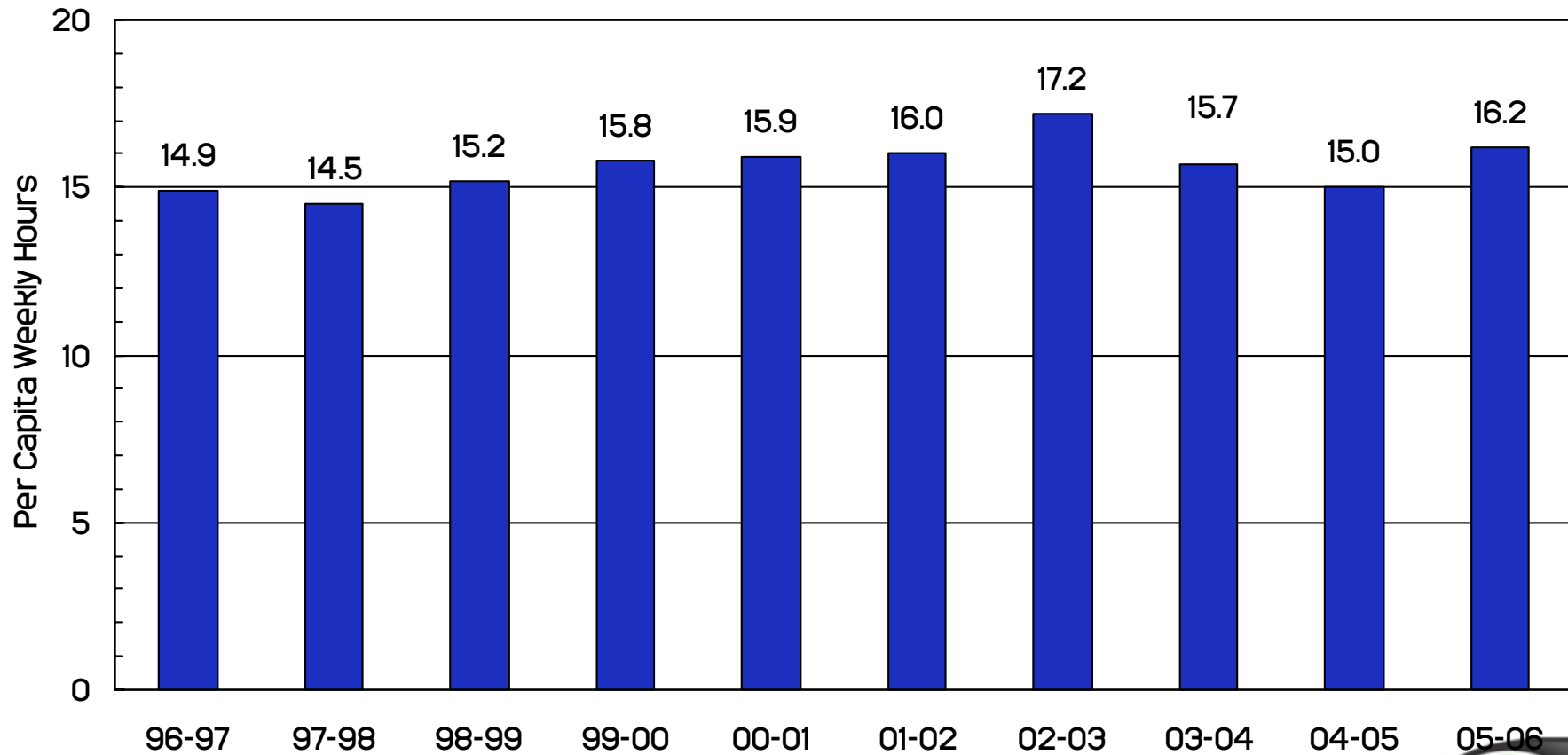


Source: Nielsen Media Research - M-Su 6a-6a Weekly Per Capita Viewing to TV in (E) Canada 90/91 to 05/06 (Sept-Aug 12-month average)

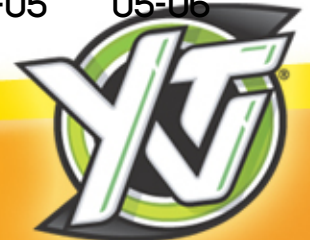


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also true for Tweens (9-14)

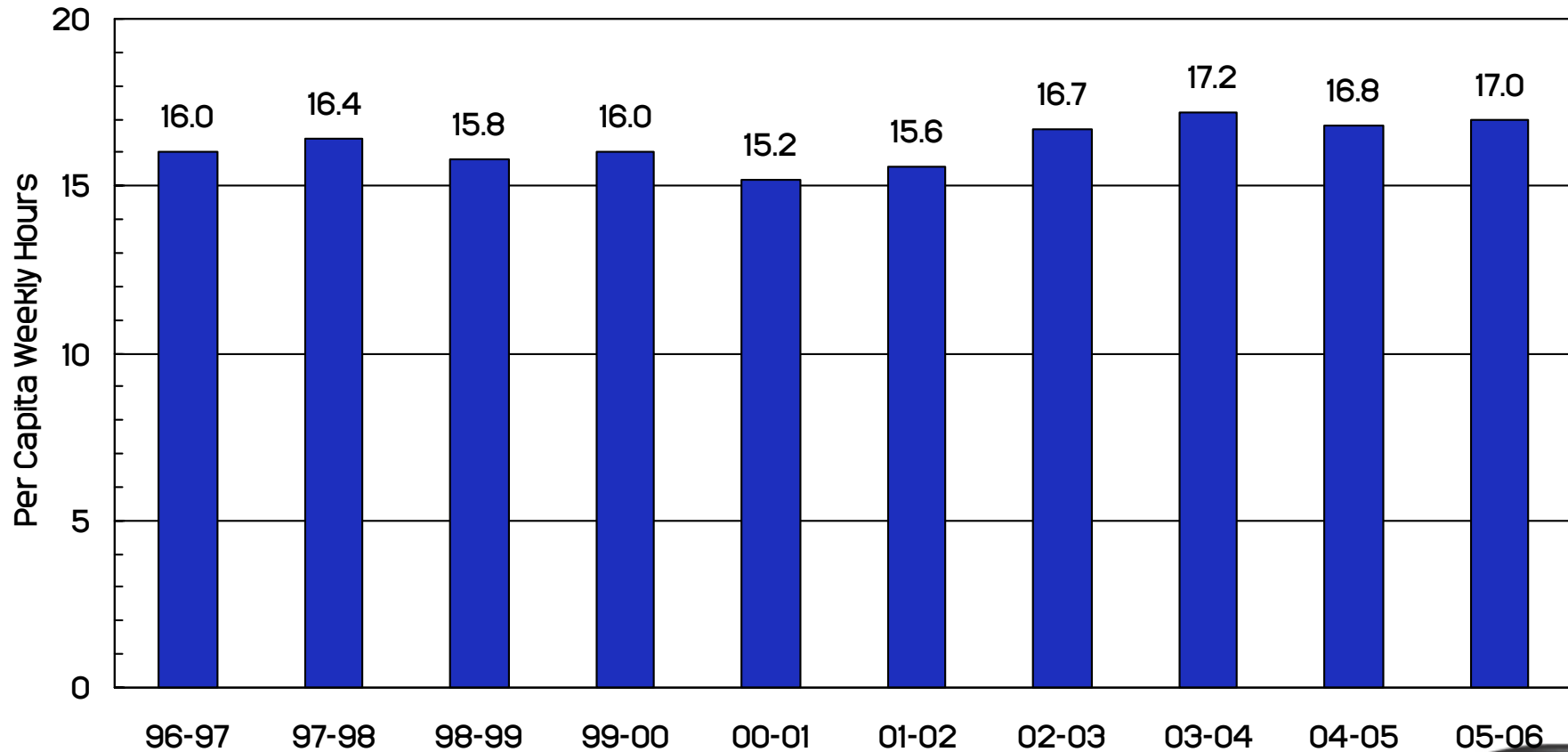


Source: Nielsen Media Research - M-Su 6a-6a Weekly Per Capita Viewing to TV in (E) Canada 96/97 to 05/06 (Sept-Aug 12-month average)



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and Teens (12-17 year olds)

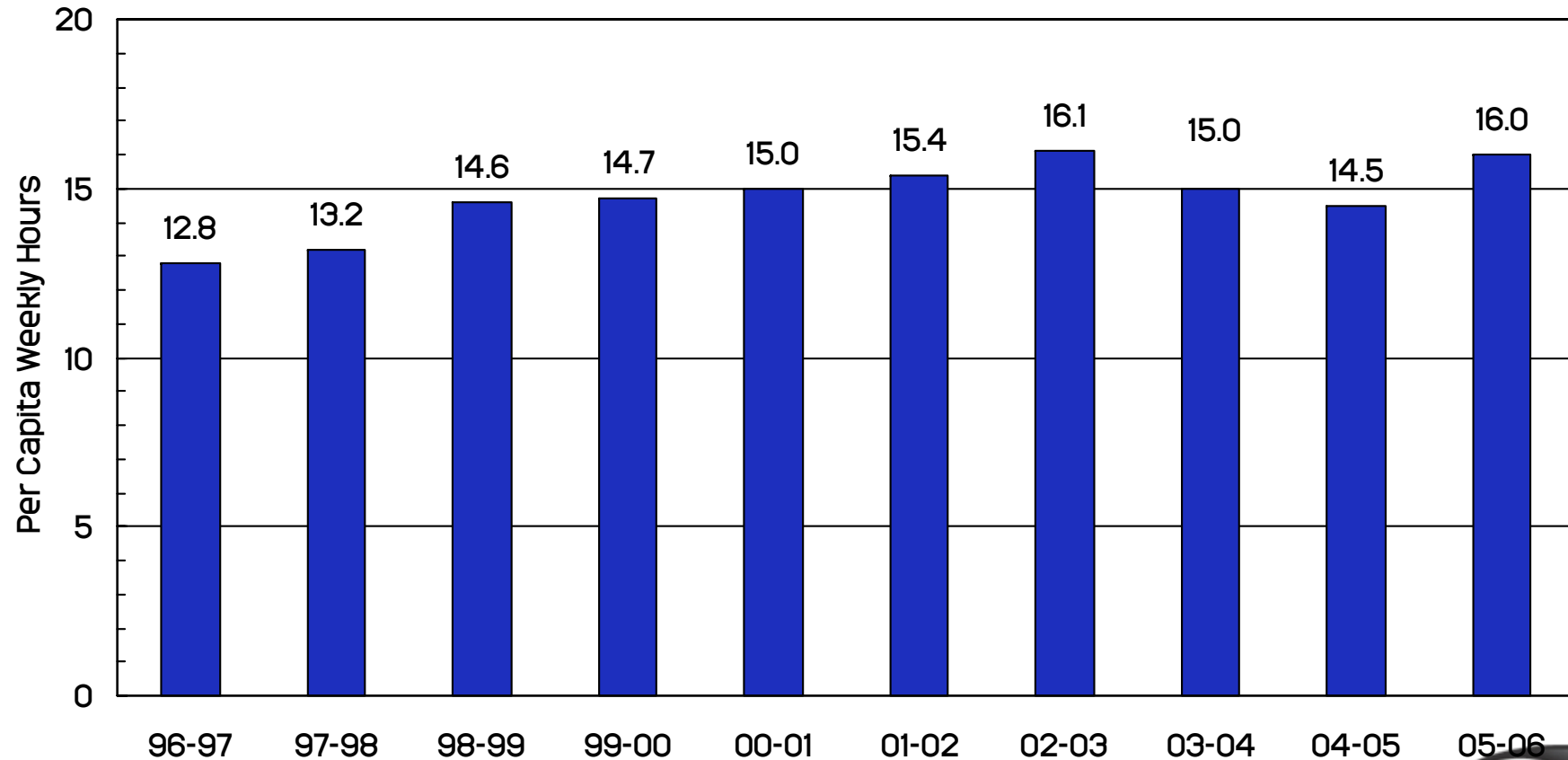


Source: Nielsen Media Research - M-Su 6a-6a Weekly Per Capita Viewing to TV in (E) Canada 96/97 to 05/06 (Sept-Aug 12-month average)



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and 7-12 year olds (this study's demo)



Source: Nielsen Media Research - M-Su 6a-6a Weekly Per Capita Viewing to TV in (E) Canada 96/97 to 05/06
(Sept-Aug 12-month average)



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But... aren't kids online?

Yes,

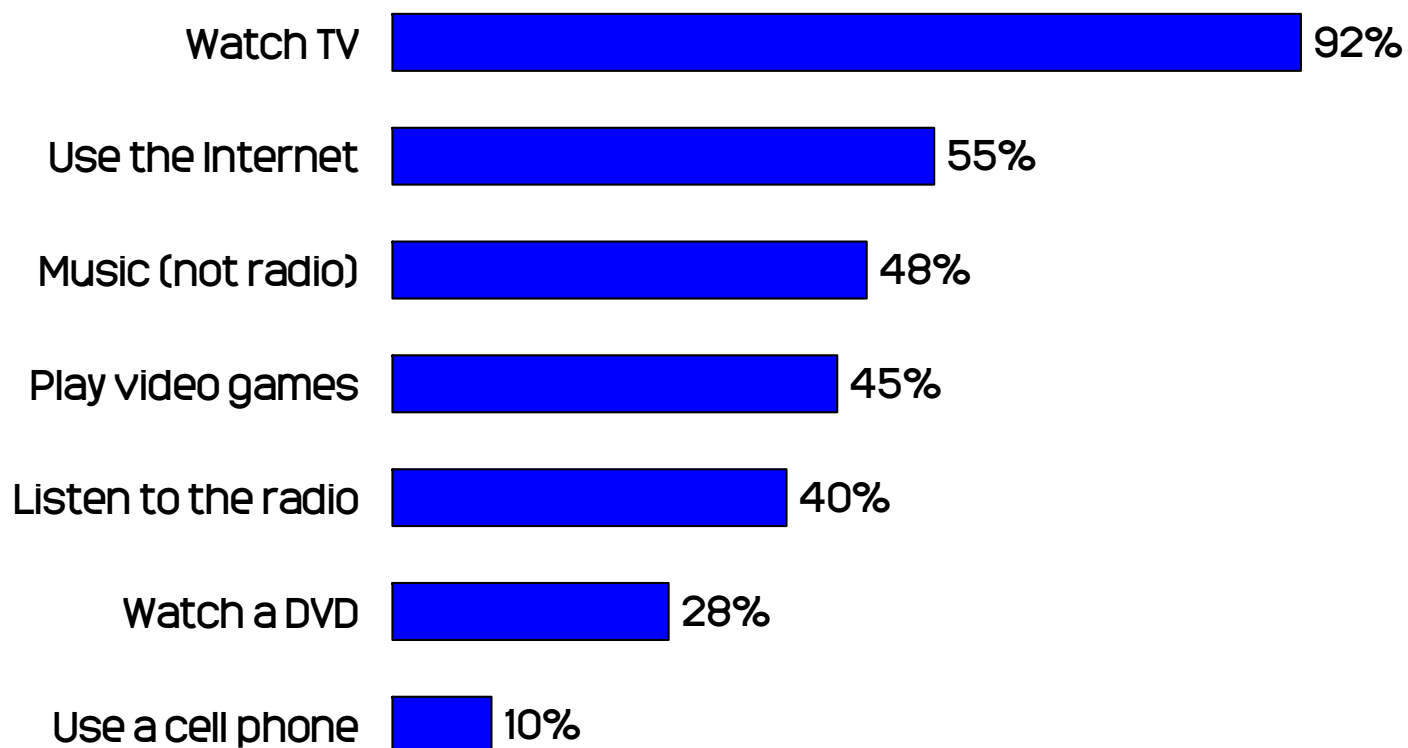
- but computer time is incremental time
(not at the expense of TV)
- and kids spend more than twice as much
time with TV as they do with the internet





What did you do yesterday?

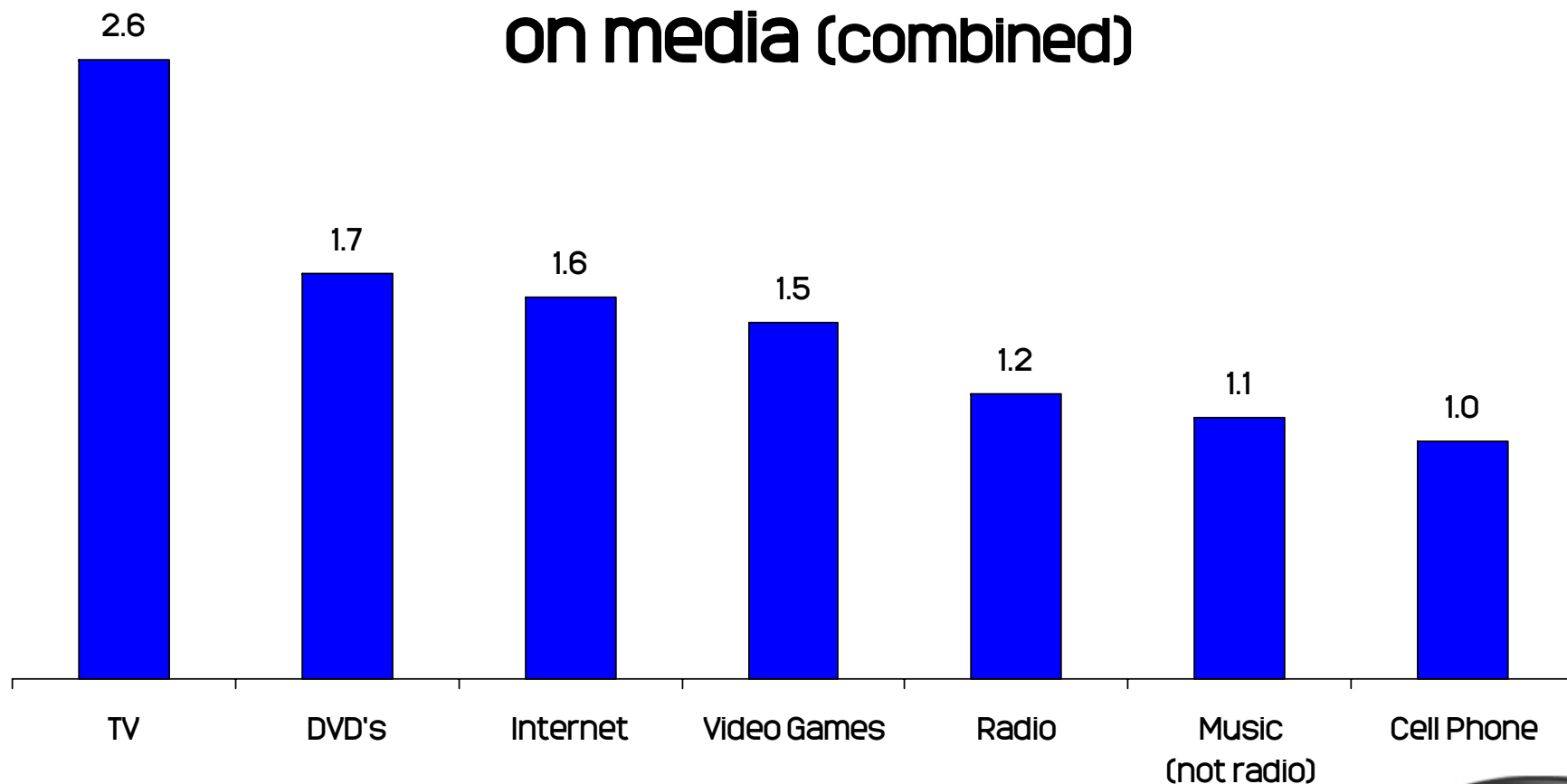
Experience with Media "Yesterday" (multiple mentions)



Q. We want you to think about yesterday.
Between the hours of 6 in the morning and 11 o'clock at night, did you...?



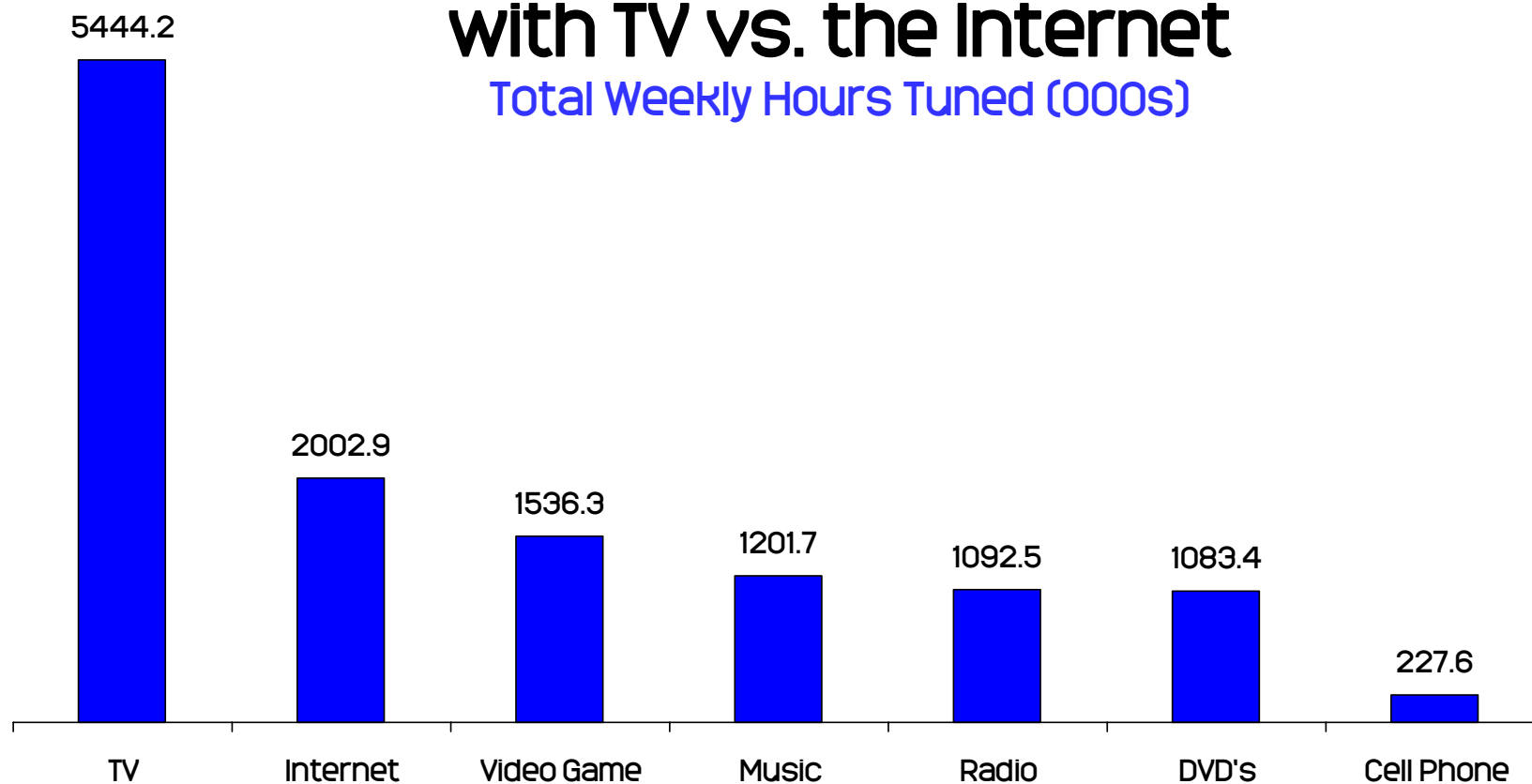
Kids spending almost 11 hours / day on media (combined)



Q. How much time did you spend doing x yesterday between < 6a and 10p? >
(Average)

Kids spend more than twice as much time with TV vs. the Internet

Total Weekly Hours Tuned (000s)

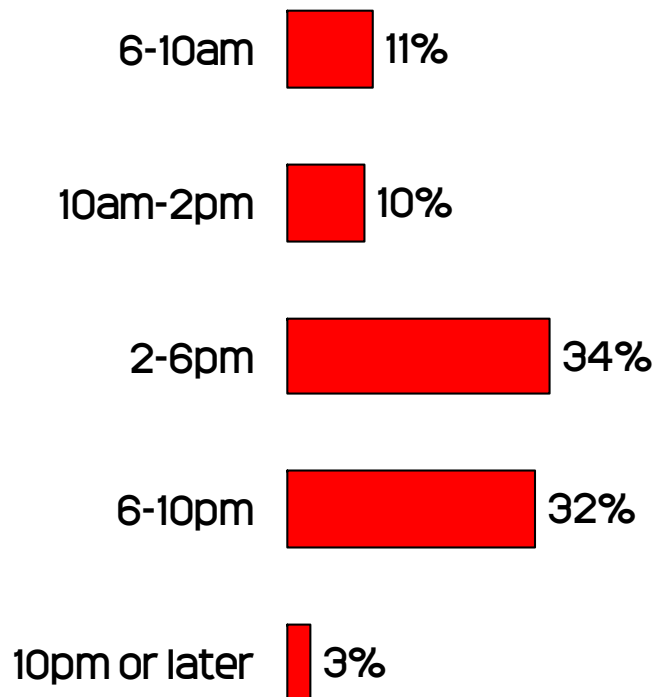


Q. How much time did you spend doing x yesterday between < 6a and 10p? > (Any)



Reach of Internet

Usage "Yesterday" by Time Block

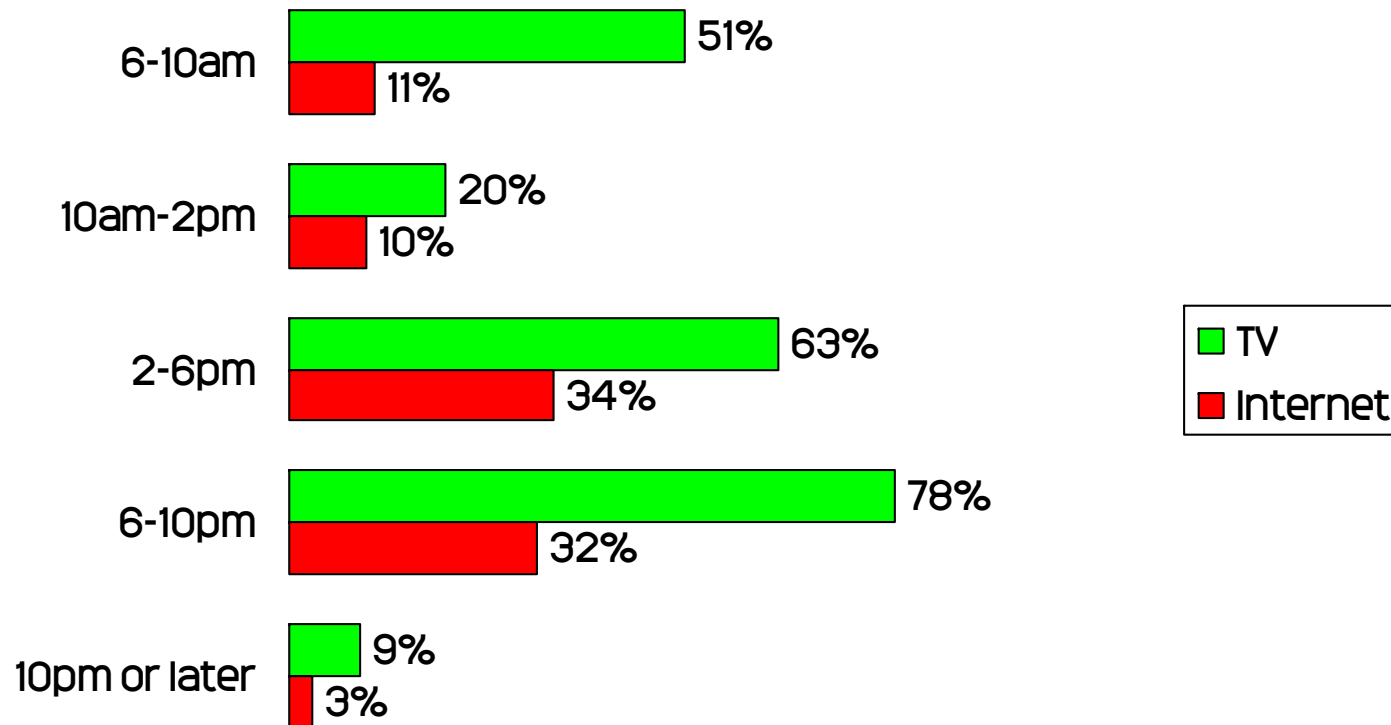


Q. How much time did you spend Using the Internet yesterday during each of the time periods below?



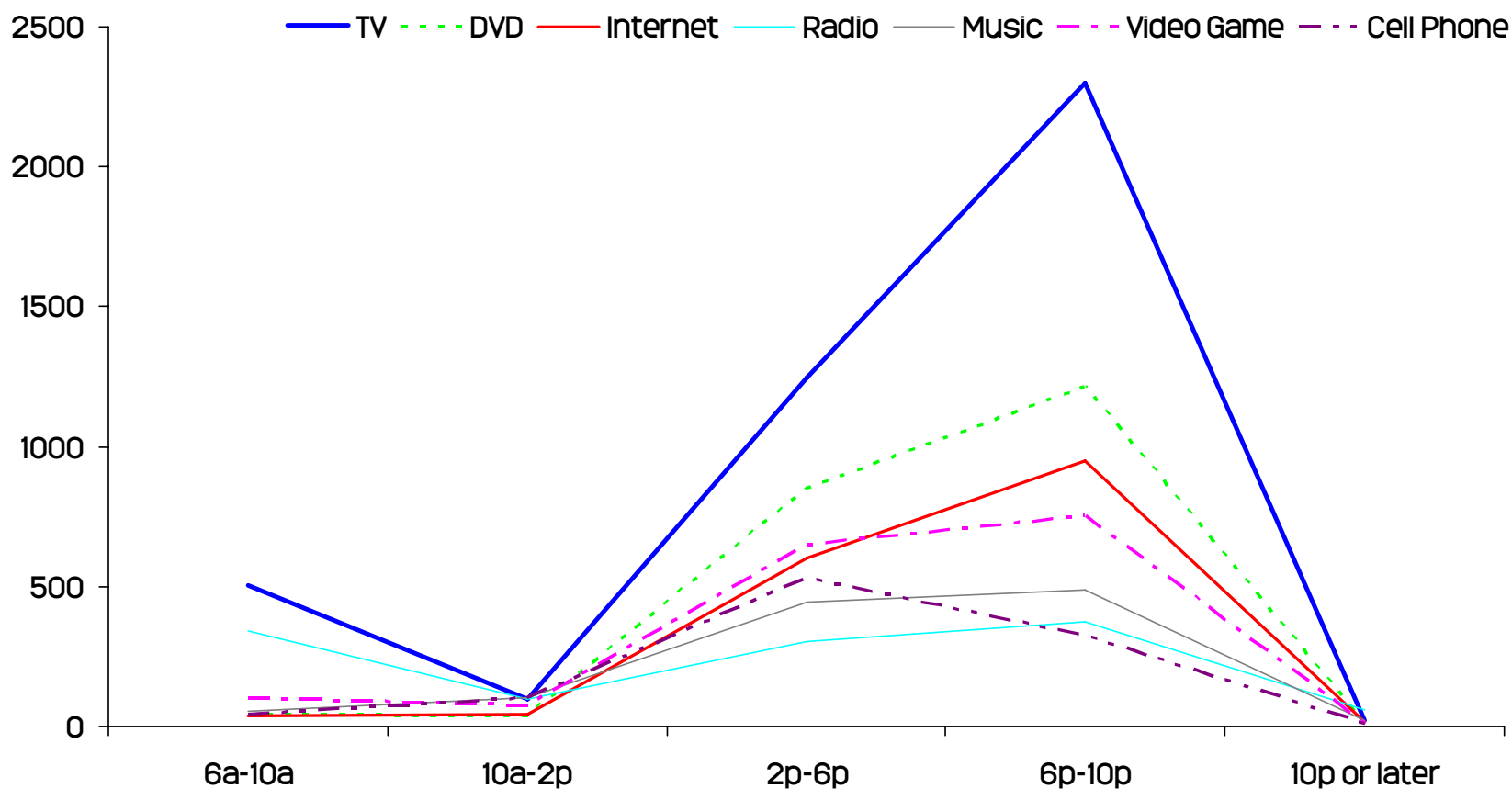
Reach of TV and Internet

Usage "Yesterday" by Time Block



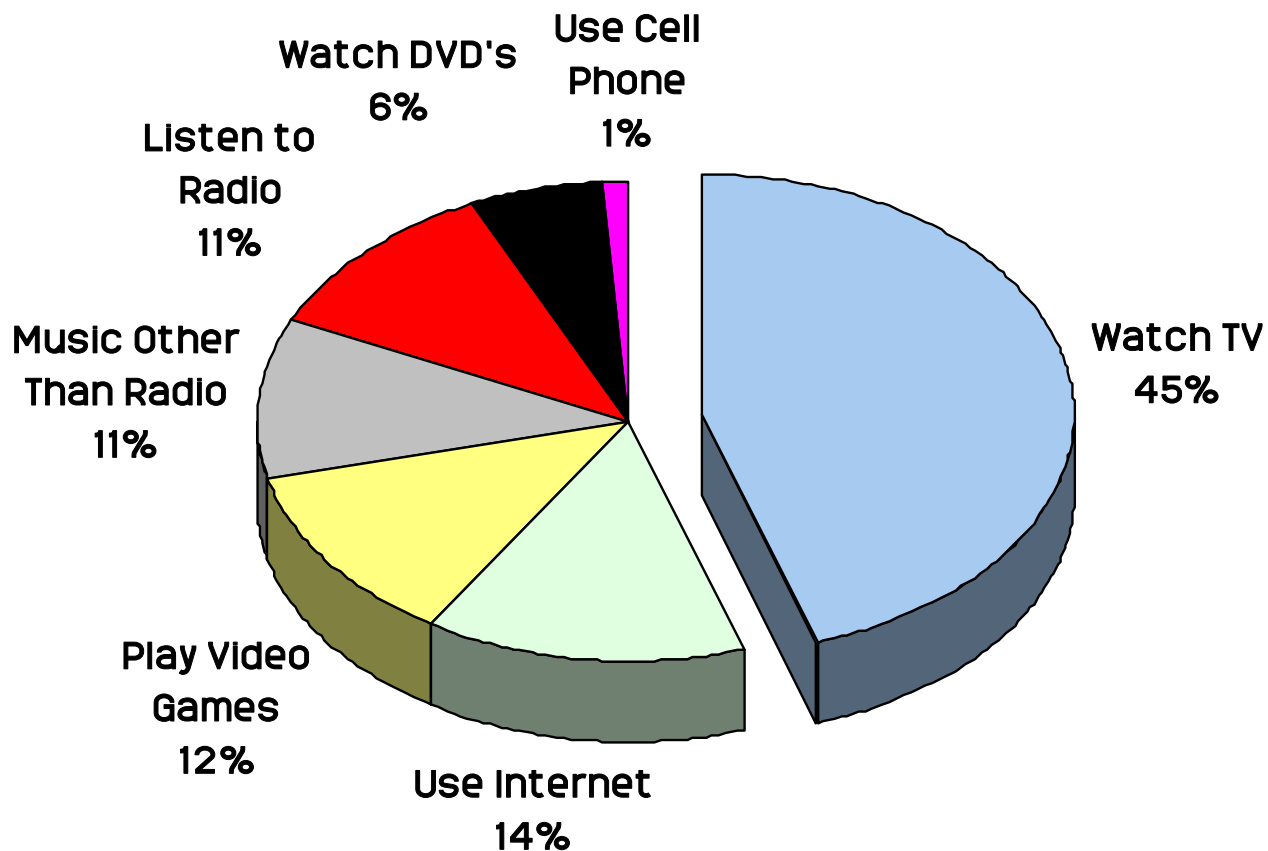
Q. How much time did you spend watching TV/Using the Internet yesterday during each of the time periods below? (Any)

Media Consumption peaks in the evening



Q. How much time did you spend doing x yesterday during each of the time periods?
(Any)

% of Time Spent on Each Medium



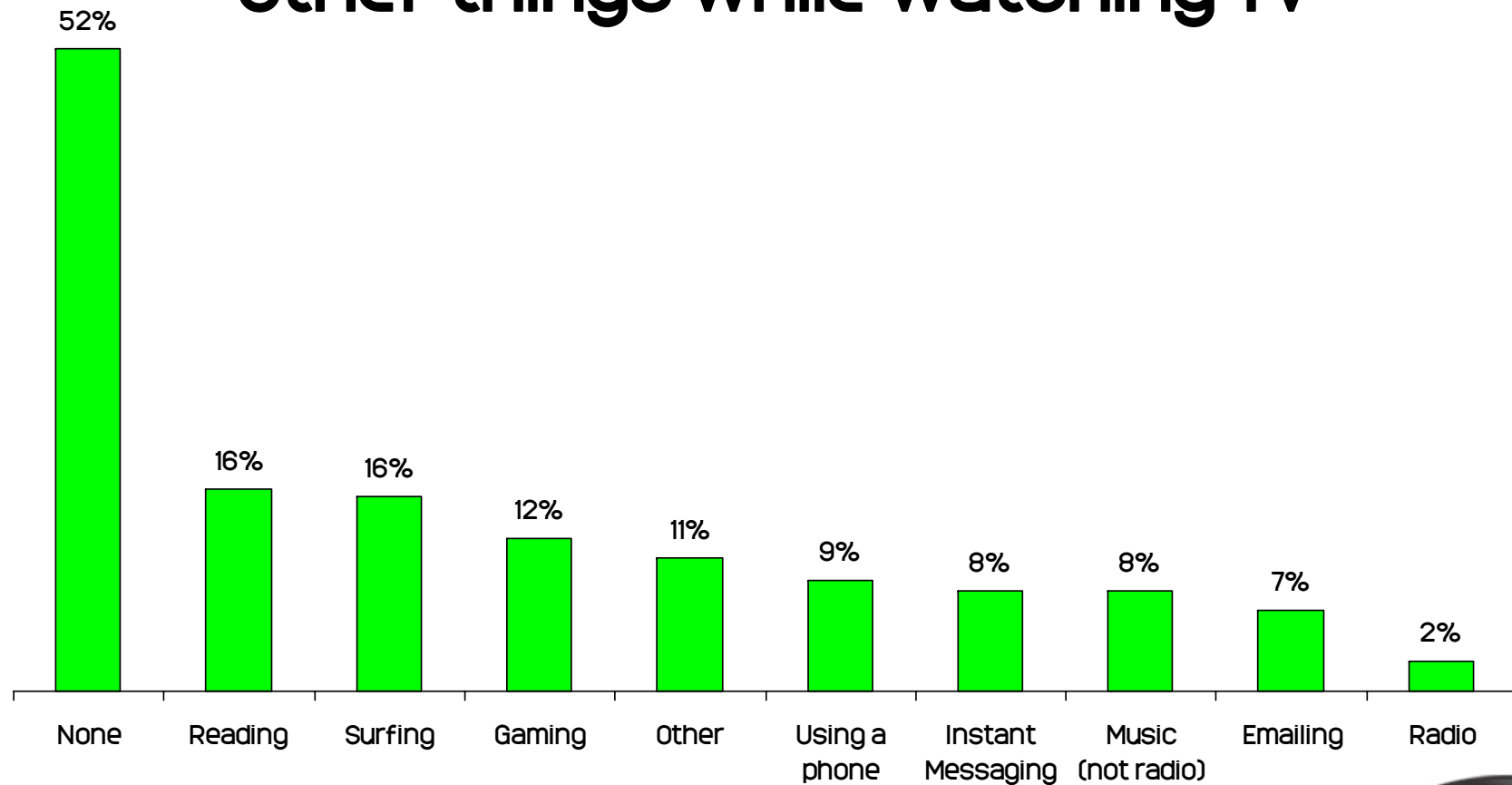
Base: All respondents (n=419)

Multi-Tasking



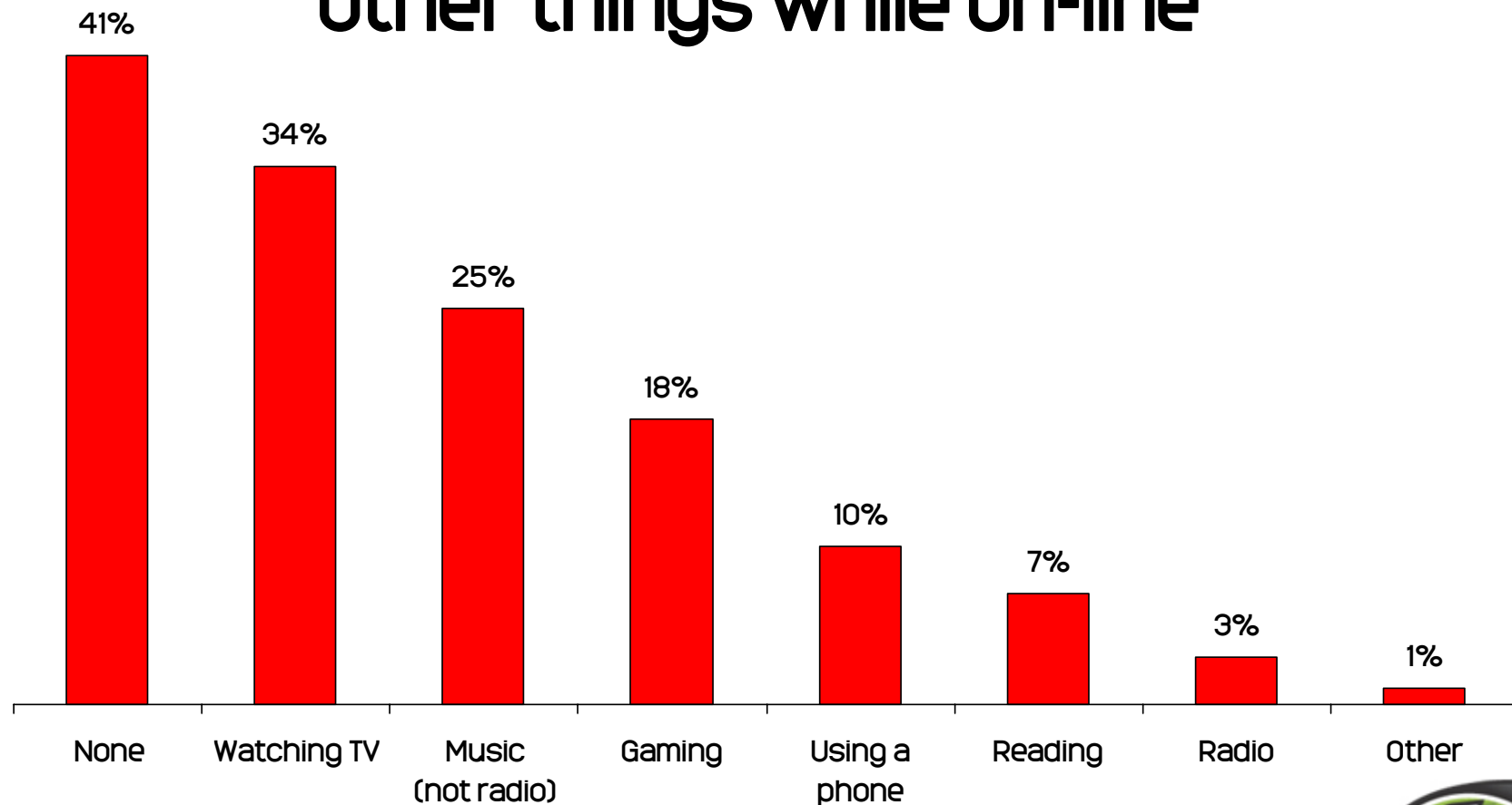
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48% of kids are doing other things while watching TV



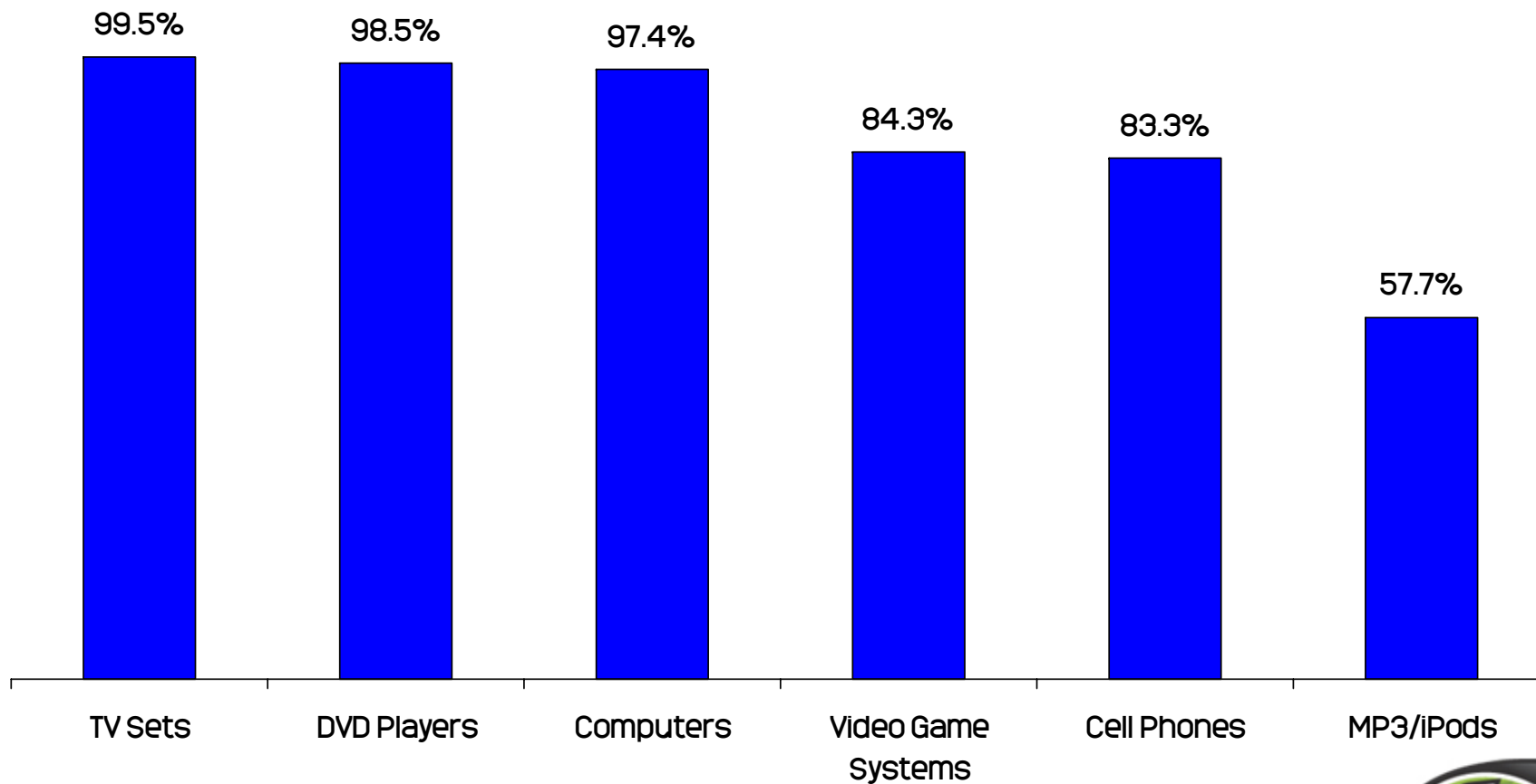
Q. Again thinking of when you were watching TV between 6a-11p were you doing any of the following at the same time? (Yes)

59% of kids are doing other things while on-line



Q. Again thinking of when you were using the Internet between 6a-11p were you doing any of the following at the same time? (Yes)

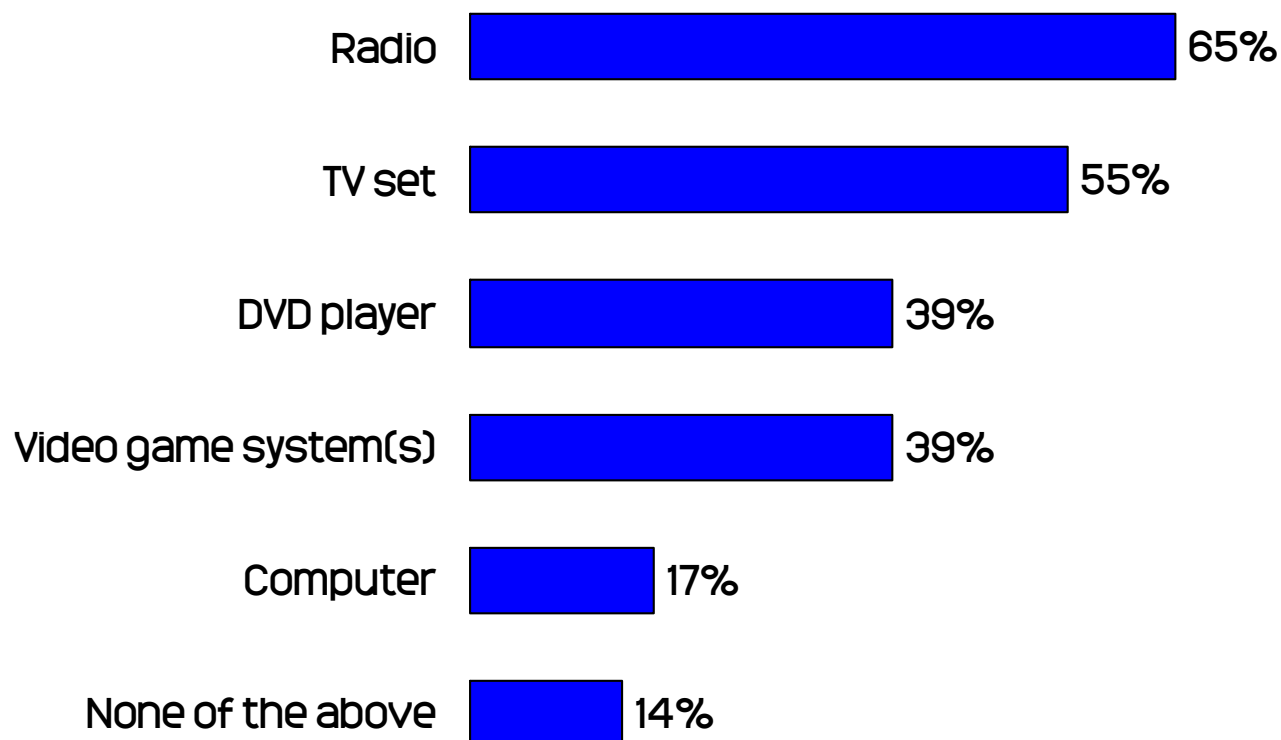
Access to media is nearly universal



Q. How many do you have in your household? (Any)

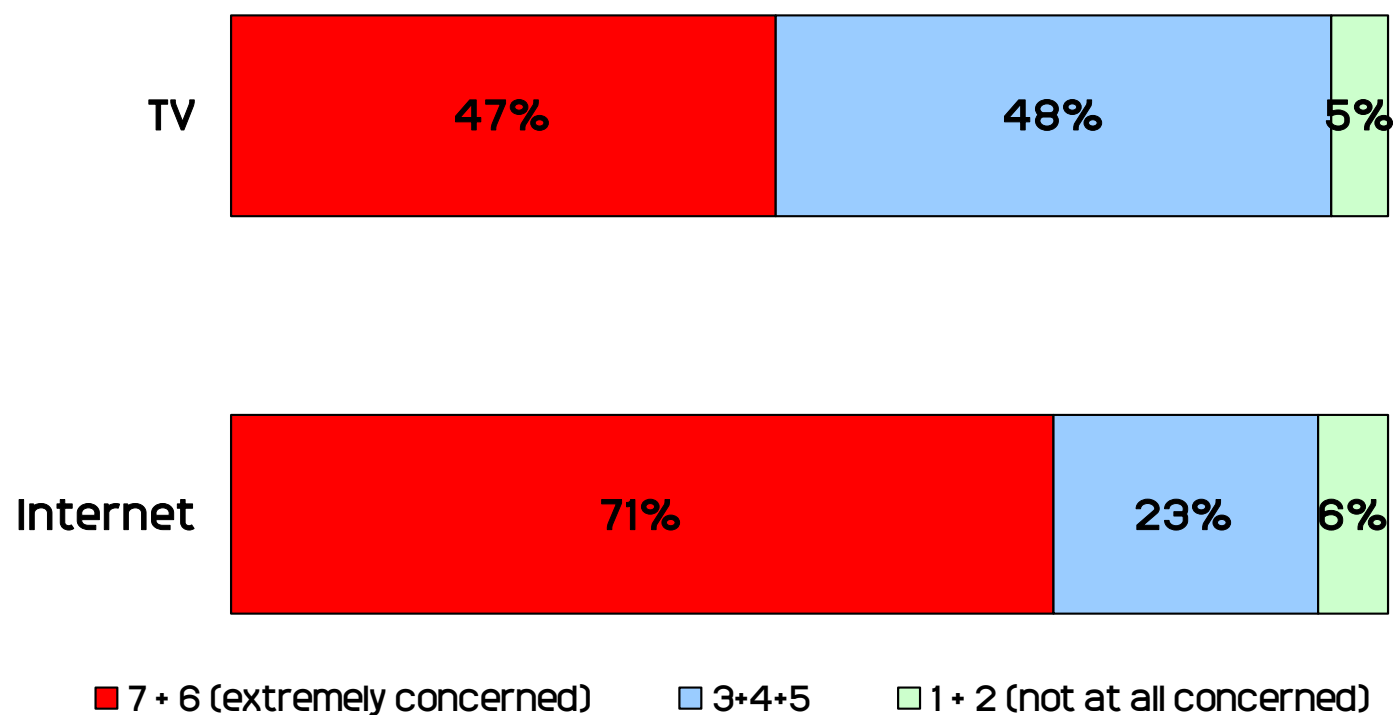
55% of Tweens have a TV in their Bedroom

Tween Ownership of Various Technology (multiple mentions)



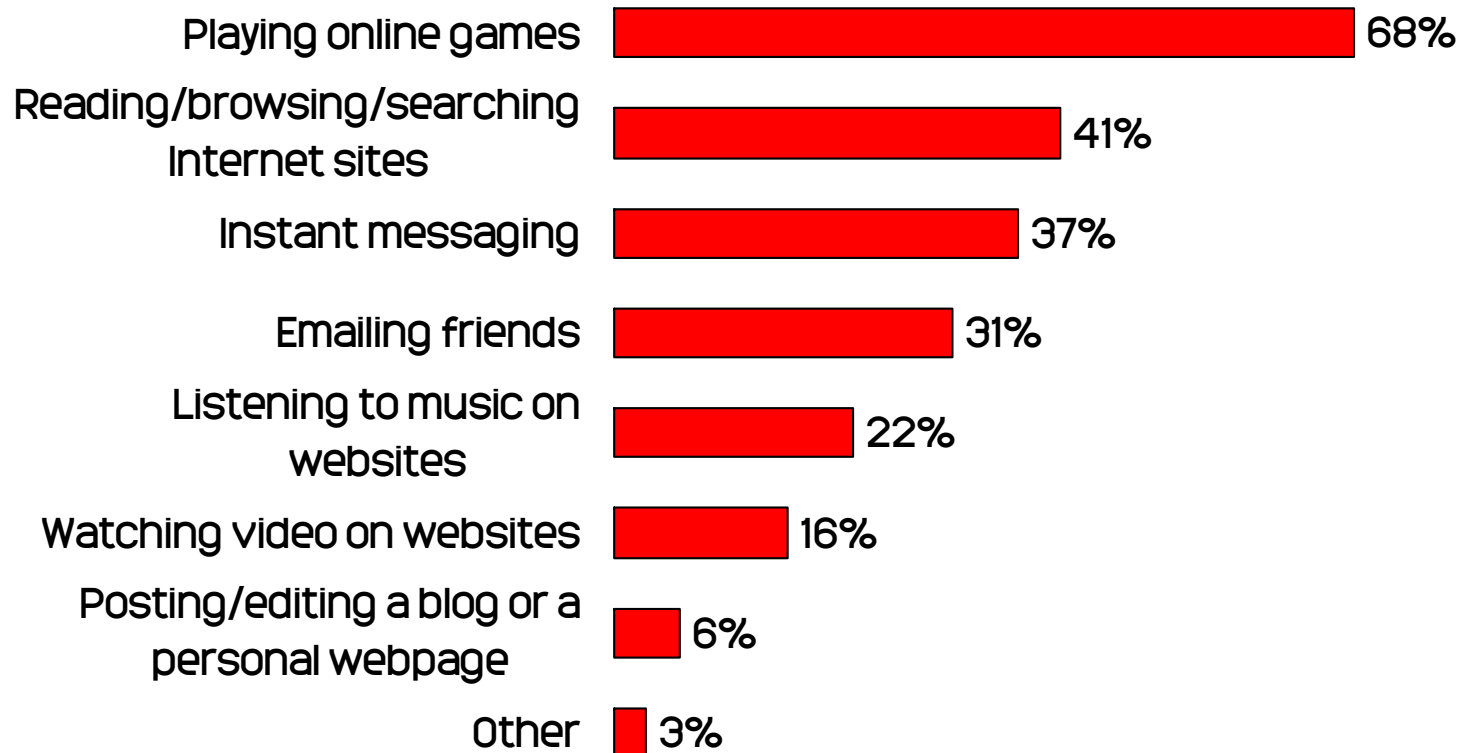
Q. Which of the following does [child's name] have in [his/her] bedroom?

Parents are concerned about the content on TV & Internet



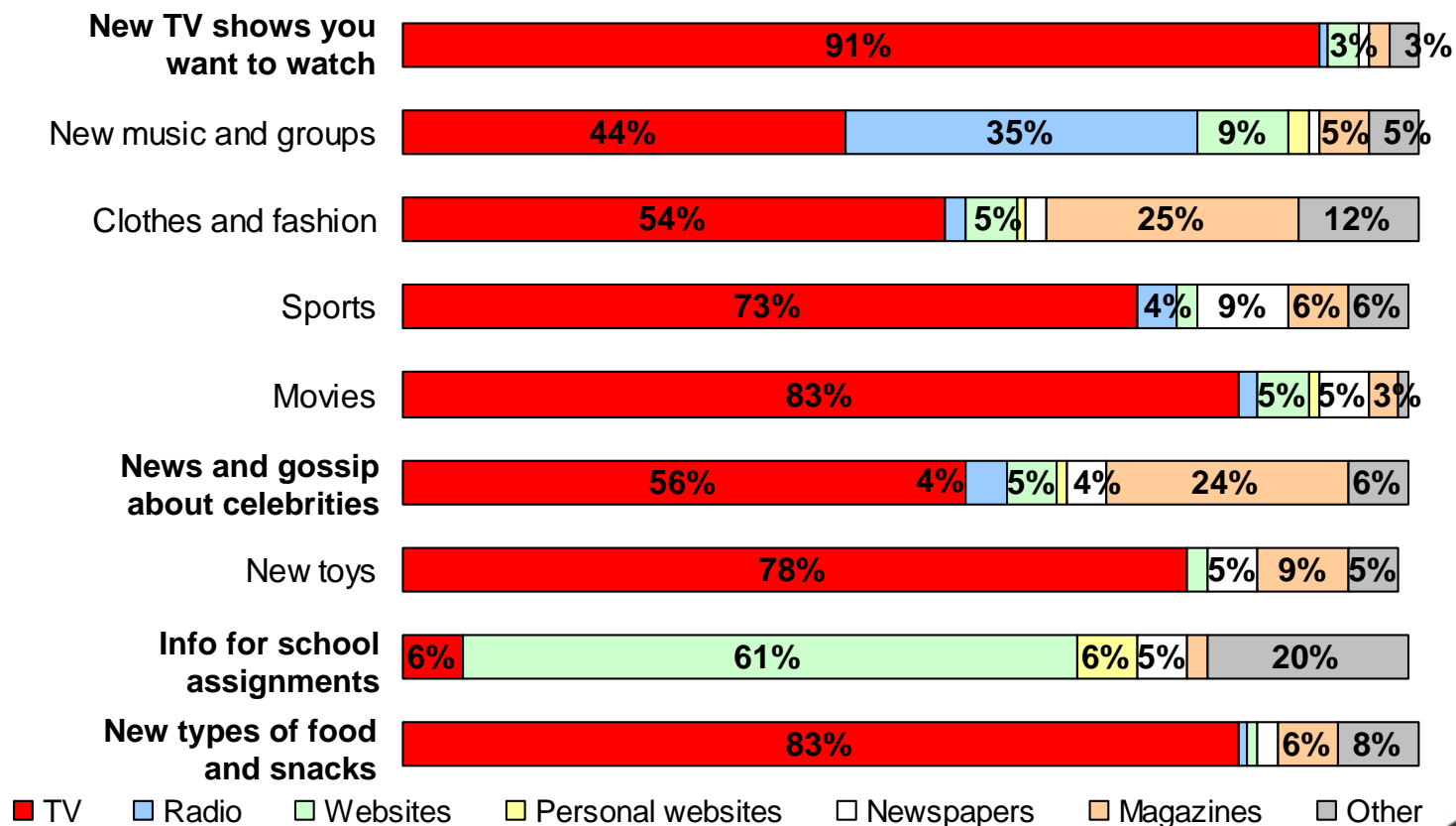
Q. How concerned are you about the appropriateness of content available to [child's name] on TV/the Internet?

Playing online games top Internet activity



Q. Thinking of all the time you were on the Internet yesterday, which of the following did you do?

TV is still the main source of information



Q. Other than friends and family, where are you most likely to find out about the following things?

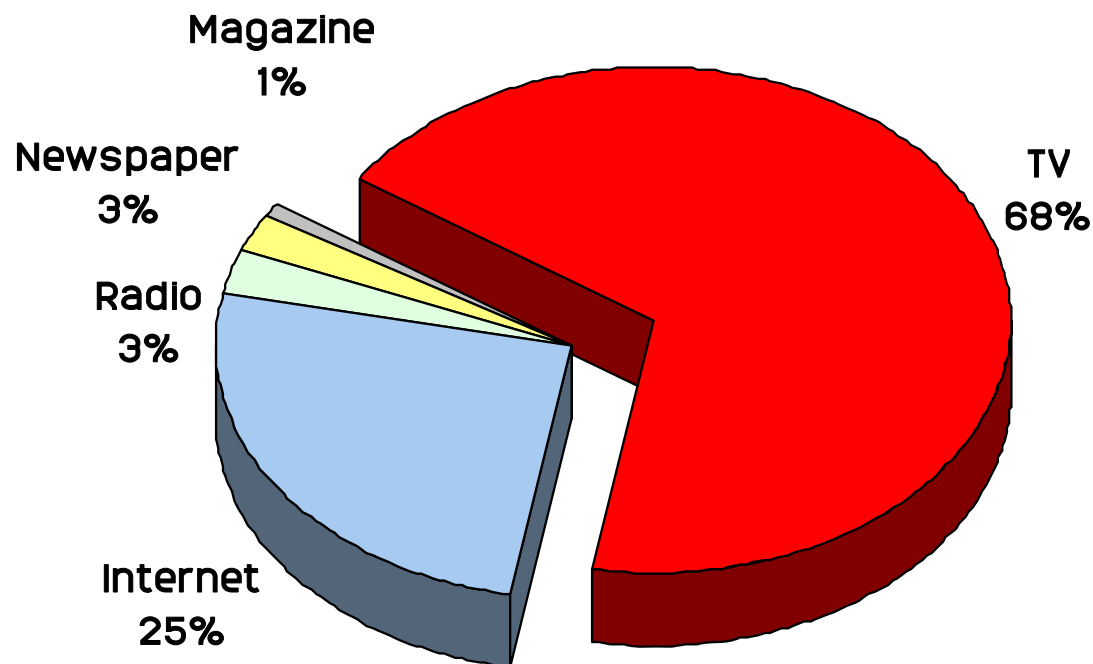
TV has the Advertising Advantage



■ TV ■ Radio ■ Internet

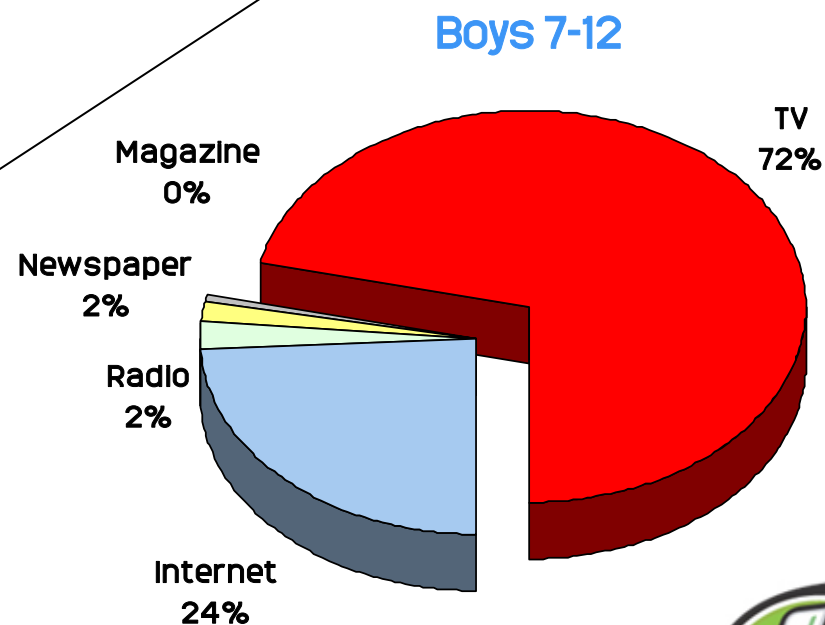
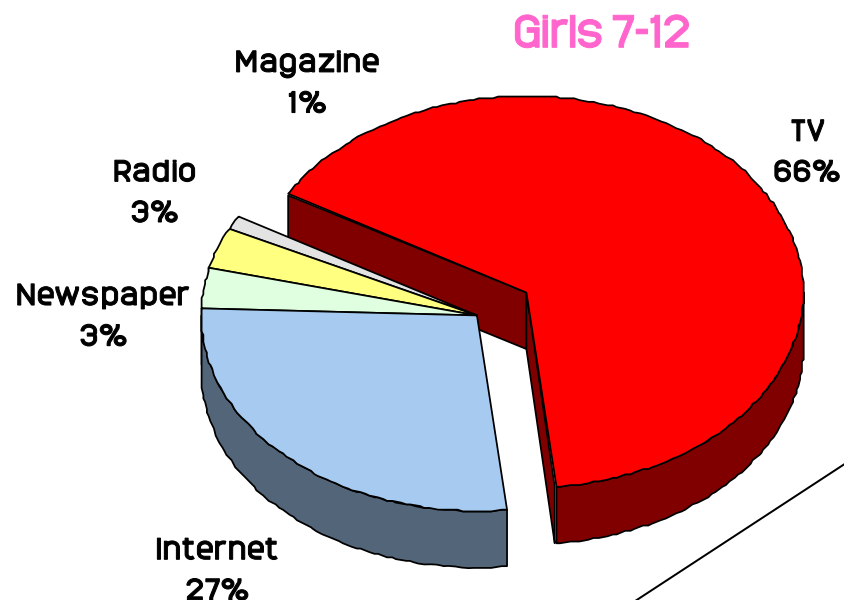
Q. Companies can advertise on TV, Radio, and on the Internet. Thinking of all three types of ads, please answer the following question by picking one of the three.

68% of kids picked TV as their favourite medium



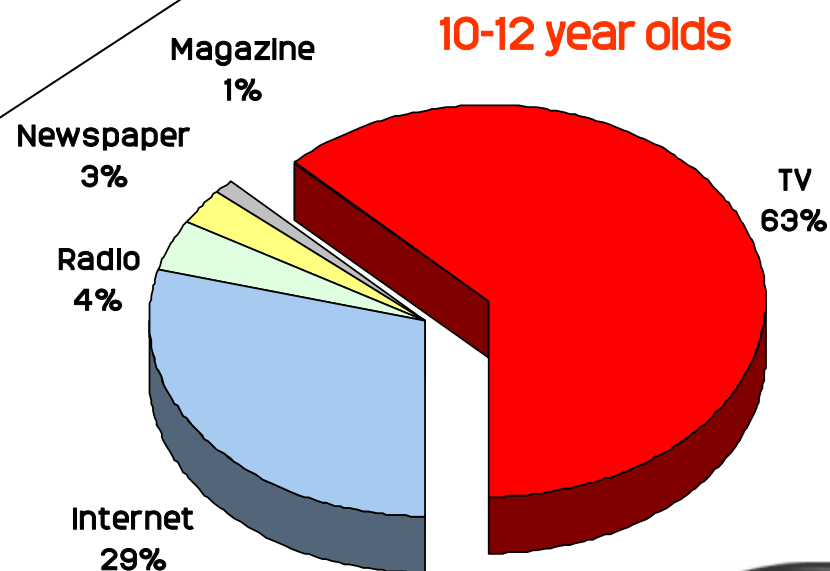
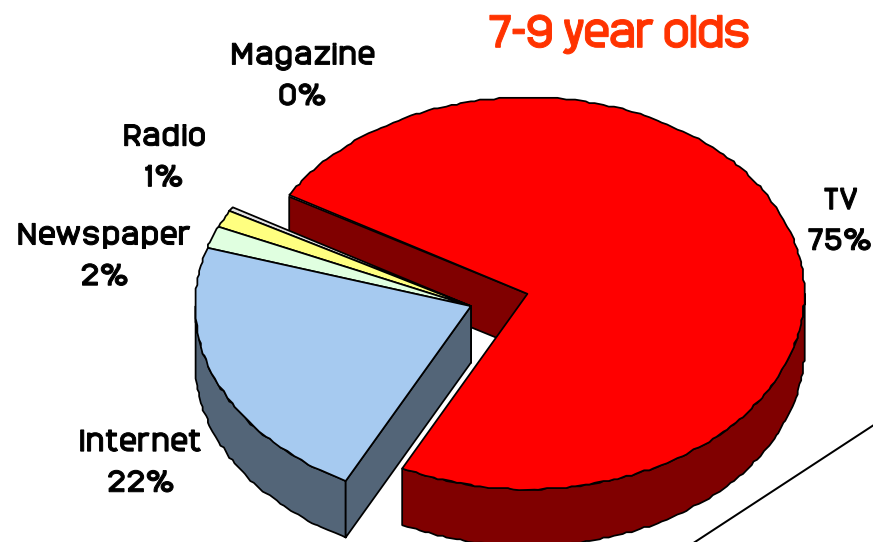
Q. If you were asked to give up access to all media except one, which one would you keep?

Boys are more likely to pick TV than girls



Q. If you were asked to give up access to all media except one, which one would you keep?

Importance of Internet increases with age



Q. If you were asked to give up access to all media except one, which one would you keep?

Conclusions

- Media consumption is growing. Internet emerges as a solid #2, while TV viewing remains ubiquitous
- The amount of time kids are spending with both TV and the Internet is substantial
- Television is a powerful influential tool because it is the #1 source of information for kids to learn about cool products & brands
- Internet activity varies with age, and becomes more important as kids get older