DIGITAL TEENS

Looking at How Technology Pervades Their Lives

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Mark Dolliver

Contributors: Lisa Barron, Marcus Johnson, Oscar Orozco, Jennifer Pearson, Monica Peart

EXECUTIVE SUMMARY

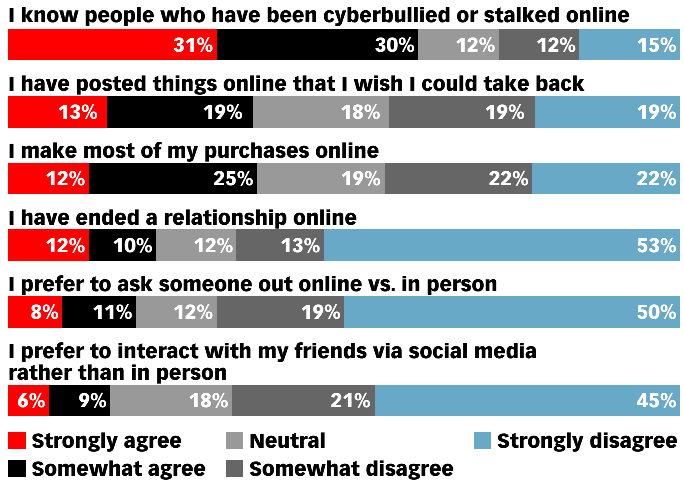
Calling today's US teens "digital natives" scarcely begins to express the degree to which digital technology permeates their daily routine.

Aided by a surge in smartphone ownership, US teens have added mobile elements to the social networking that was already a daily presence for many. But this does not mean that teens as a group have decamped from Facebook, even if it occupies less of their time and emotional energy than it once did. Teens get much of their entertainment (TV shows, movies, music, etc.) in digital form, though it has not rendered them indifferent to traditional TV. Ecommerce plays a more modest role in their shopping.

This report will examine the flux (and the continuity) in teens' social networking. It will look at how equipped they are with smartphones and other digital devices, assess the ways in which they turn to digital resources for entertainment and gauge the importance of ecommerce for them. And it will look at whether concerns about cyberbullying and privacy are significant aspects of digital life for large numbers of teens.

Attitudes Toward Internet-Related Activities/Issues According to US Teens, Oct 2014

% of respondents



Note: ages 16-19; numbers may not add up to 100% due to rounding
Source: Northeastern University, "Portrait of Generation Z," Nov 18, 2014

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KEY QUESTIONS

- Have US teens abandoned Facebook?
- After a slow start in smartphone adoption, are teens catching up?
- What role does digital video play in teens' entertainment mix? How about digital music?
- Does traditional media still matter to teens?
- How big a factor is ecommerce in teens' behavior as buyers?

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WHAT COUNTS AND WHAT DOESN'T

Sometimes marketers must look beyond the obvious characteristics of a demographic group and see its nuances. It's a bit different with US teens. In dealing with this population, it pays to avoid getting too tangled in the nuances—the latest twists in their social networking, their passing fancies among YouTube celebrities, their apps of the moment—and instead focus on the big and less fluid aspects of their digital and media usage. The ephemera of teens' behavior can be a distraction from its more central characteristics.

In examining the pertinent data, this can mean focusing less on comparative numbers and more on absolute numbers. Today's teens are less obsessed with Facebook than in the past, but millions still use it regularly. Comparatively speaking, teens watch less TV than they used to; in absolute numbers, they still watch tons of it. Their usage of some social mobile apps has risen steeply in percentage terms but remains small in absolute scale.

Mystification of teen life—i.e., discussing teens as if they come not merely from a different generation but from a different planet—has a long tradition. And it carries over these days to treatment of their digital activity. But maybe, if we don't obsess about the marginal minutiae of their behavior and focus more on its core, teens are not quite so mysterious after all.

TEENS AND SOCIAL NETWORKING

As highly social beings, teens put social networking at the core of their digital usage. And as this activity converges with mobile usage, it often extends beyond the big-name social networks. This does not mean, however, that teens have abandoned Facebook.

Even in a restrictive sense of the term, social networking is the norm among the 97.0% of 12- to 17-year-olds who eMarketer pegs as internet users. Nearly nine in 10 are expected to be social network users this year—i.e., using sites at least monthly where the primary activities involve creating a profile and interacting with a network of people via status updates, shared photos, etc.

US Social Network User Metrics, by Age, 2013-2019

	2013	2014	2015	2016	2017	2018	2019
Social network users (millions)							
0-11	3.9	4.3	4.5	4.8	4.9	5.1	5.3
12-17	20.6	21.0	21.2	21.4	21.6	21.8	21.9
18-24	27.3	28.0	28.5	28.8	29.1	29.2	29.4
25-34	33.3	34.4	35.5	36.5	37.4	38.3	39.2
35-44	28.0	29.1	29.8	30.4	31.0	31.6	32.1
45-54	24.7	25.7	26.5	26.9	27.2	27.6	27.8
55-64	18.1	19.0	19.7	20.5	21.3	22.1	22.8
65+	9.7	12.3	14.6	16.7	18.7	20.2	21.6
Total	**165.7**	**173.6**	**180.3**	**186.0**	**191.2**	**195.9**	**200.1**
Social network user penetration (% of internet users in each group)							
0-11	17.0%	17.8%	18.3%	18.9%	19.2%	19.5%	20.0%
12-17	85.3%	86.5%	87.5%	88.3%	89.0%	89.7%	90.0%
18-24	93.0%	94.0%	95.0%	96.0%	96.7%	97.2%	97.7%
25-34	85.0%	86.0%	86.4%	86.4%	86.6%	86.8%	87.5%
35-44	77.0%	79.0%	80.0%	81.0%	81.5%	81.9%	82.1%
45-54	65.0%	67.2%	69.0%	70.0%	71.3%	72.8%	74.5%
55-64	57.0%	57.7%	58.5%	59.5%	60.5%	61.5%	63.0%
65+	40.0%	45.0%	48.0%	50.0%	52.0%	54.0%	56.0%
Total	**67.4%**	**68.6%**	**69.4%**	**70.1%**	**70.7%**	**71.4%**	**72.3%**
Social network user share (% of total)							
0-11	2.3%	2.5%	2.5%	2.6%	2.6%	2.6%	2.6%
12-17	12.5%	12.1%	11.8%	11.5%	11.3%	11.1%	10.9%
18-24	16.5%	16.1%	15.8%	15.5%	15.2%	14.9%	14.7%
25-34	20.1%	19.8%	19.7%	19.6%	19.6%	19.6%	19.6%
35-44	16.9%	16.8%	16.5%	16.4%	16.2%	16.1%	16.1%
45-54	14.9%	14.8%	14.7%	14.5%	14.2%	14.1%	13.9%
55-64	11.0%	10.9%	10.9%	11.0%	11.1%	11.3%	11.4%
65+	5.8%	7.1%	8.1%	9.0%	9.8%	10.3%	10.8%

Note: internet users who use social networks via any device at least once per month
Source: eMarketer, Feb 2015

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This large constituency reflects the fact that teens use social networking for numerous purposes. When an August 2014 survey by Camp Mobile asked respondents about content they share on social media, majorities of 13- to 17-year-olds cited pictures of themselves, pictures of friends/family and information about their activities. Many listed other content ranging from videos to "rants."

Types of Content Shared on Social Media by US Teen and Young Adult Internet Users, by Demographic, Aug 2014

% of respondents in each group

	Gender		Age		Total
	Female	Male	13-17	18-22	
Pictures of myself	65%	55%	59%	61%	60%
Pictures of friends and/or family	64%	43%	52%	54%	53%
Information about what I am doing	55%	46%	51%	49%	50%
Information about school and/or work	51%	37%	41%	47%	44%
Messages of love and support	45%	27%	32%	40%	36%
Information about vacations	31%	24%	27%	28%	27%
Videos of friends and/or family	28%	21%	24%	24%	24%
"Rants" when I'm upset about something	28%	20%	20%	28%	24%
Videos of myself and/or the things I am doing	22%	19%	23%	18%	20%
Information about my love life or significant other	25%	13%	12%	26%	19%
Angry messages to people	9%	11%	9%	11%	10%
Other	16%	17%	19%	14%	16%
None of these	12%	18%	17%	14%	15%

Source: Camp Mobile, "The Youth and Online Habits Study," Oct 22, 2014

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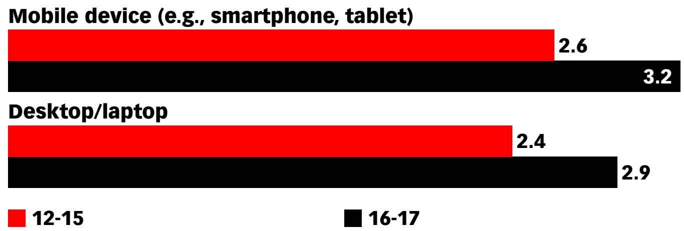
Parents may feel another metric of teen involvement with social media is quite as telling: In an April 2014 survey for internet-security firm McAfee, 47% of 13- to 15-year-olds and 40% in the 16-to-18 age bracket confessed they have "gotten into trouble" by using it.

Social networking pervades teen life partly because it plays out on multiple devices. In February 2014 polling by The Futures Company, 49% of online 12- to 15-year-olds had used social networks on a desktop or laptop computer in the prior seven days; 48% had done so on a mobile device such as a smartphone or tablet. Among 16- to 17-year-olds, 57% had networked via desktop/laptop and 61% via mobile. Teens spent more time social networking on mobile devices than on computers.

Weekly Time Spent on Social Networks Among US Teen Internet Users, by Age and Device, Feb 2014

hours



Note: in the past 7 days; e.g., Facebook, Twitter
Source: The Futures Company, "The TRU Youth Monitor - Spring 2014," Jan 22, 2015

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Adults' fears to the contrary, teens' digital socializing has not replaced the in-person variety. In October 2014 polling of 16- to 19-year-olds by Northeastern University, 6% agreed "strongly" and 9% "somewhat" that they prefer interacting with friends via social media. Nearly half disagreed strongly. Still, some do find interaction less daunting on social media than face-to-face. In McAfee's survey, 39% of 13- to 15-year-olds and 30% of those ages 16 to 18 said they "feel more accepted on social media than in person."

For better or worse, more teens are increasing than decreasing their social usage. In Camp Mobile's survey, the proportion saying their time spent on social media had increased from a year earlier (36%) was more than double the proportion saying it had decreased (16%).

DON'T WRITE OFF FACEBOOK

The past year has seen sporadic declarations that teens no longer find Facebook cool and are deserting it en masse. They may indeed feel Facebook is not cool, now that it includes parents and other undesirables. Cool or not, though, Facebook has come to feel like a practical necessity for many teens in the US.

Among internet users ages 12 to 17, eMarketer estimates that more than eight in 10 are Facebook users—a scale unique to that social network.

US Facebook User Metrics, by Age, 2013-2019

	2013	2014	2015	2016	2017	2018	2019
Facebook users (millions)							
0-11	2.7	2.9	3.0	3.0	3.1	3.2	3.2
12-17	19.6	19.8	19.9	20.1	20.1	20.2	20.3
18-24	25.3	25.9	26.4	26.6	26.8	26.9	26.9
25-34	30.4	31.3	32.3	33.2	34.1	34.9	35.3
35-44	24.0	24.7	25.2	25.6	26.1	26.5	26.9
45-54	21.7	22.2	22.5	22.9	23.1	23.4	23.5
55-64	15.8	16.4	17.1	17.8	18.4	19.0	19.7
65+	8.0	9.3	10.7	12.2	14.0	15.1	16.2
Total	**147.5**	**152.4**	**157.1**	**161.4**	**165.7**	**169.2**	**172.0**
Facebook user penetration (% of internet users in each group)							
0-11	11.7%	12.0%	12.0%	12.0%	12.0%	12.0%	12.0%
12-17	80.9%	81.7%	82.3%	82.8%	83.0%	83.3%	83.3%
18-24	86.2%	87.1%	88.0%	88.5%	89.0%	89.4%	89.5%
25-34	77.7%	78.3%	78.6%	78.6%	78.8%	79.0%	79.0%
35-44	66.0%	67.0%	67.7%	68.2%	68.5%	68.7%	68.7%
45-54	57.0%	58.0%	58.7%	59.6%	60.6%	61.7%	63.0%
55-64	49.6%	50.0%	50.7%	51.6%	52.3%	53.0%	54.3%
65+	33.0%	34.0%	35.0%	36.6%	39.0%	40.5%	42.0%
Total	**60.0%**	**60.2%**	**60.5%**	**60.8%**	**61.2%**	**61.6%**	**62.1%**
Facebook user share (% of total)							
0-11	1.8%	1.9%	1.9%	1.9%	1.9%	1.9%	1.8%
12-17	13.3%	13.0%	12.7%	12.4%	12.2%	11.9%	11.8%
18-24	17.2%	17.0%	16.8%	16.5%	16.2%	15.9%	15.6%
25-34	20.6%	20.6%	20.5%	20.6%	20.6%	20.6%	20.6%
35-44	16.3%	16.2%	16.1%	15.9%	15.7%	15.7%	15.6%
45-54	14.7%	14.5%	14.3%	14.2%	14.0%	13.8%	13.7%
55-64	10.7%	10.8%	10.9%	11.0%	11.1%	11.2%	11.4%
65+	5.4%	6.1%	6.8%	7.6%	8.4%	8.9%	9.4%

Note: internet users who access their Facebook account via any device at least once per month
Source: eMarketer, Feb 2015

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A Frank N. Magid Associates report got headlines for November 2014 survey data showing a decline in percentage of social networkers ages 13 to 17 who use Facebook, from 94% to 88%. This works out to an annual decline of slightly above 6%. If Facebook continues losing teens at this pace, it will indeed run out of them—sometime in the second half of this century.

With Facebook penetration still so high, the salient question is whether teens still use it regularly. The Futures Company's survey queried teens on the frequency with which they use some social networks. A significant minority reported having a Facebook account but "rarely" using it. However, a majority reported visiting it regularly. The ratio of "rarely" to "regularly" users was worse for some social venues—including Snapchat, Vine and Tumblr—that get buzz as teen favorites.

US Teen Internet Users Who Regularly vs. Rarely Visit Select Social Media Sites, Feb 2014

% of respondents

	Regularly	Rarely
YouTube	62%	16%
Facebook	61%	18%
Instagram	40%	12%
Twitter	32%	21%
Snapchat	29%	14%
Tumblr	21%	11%
Vine	16%	15%
Pinterest	15%	13%

Note: ages 12-19; have an account on each site
Source: The Futures Company, "The TRU Youth Monitor - Spring 2014," Jan 22, 2015

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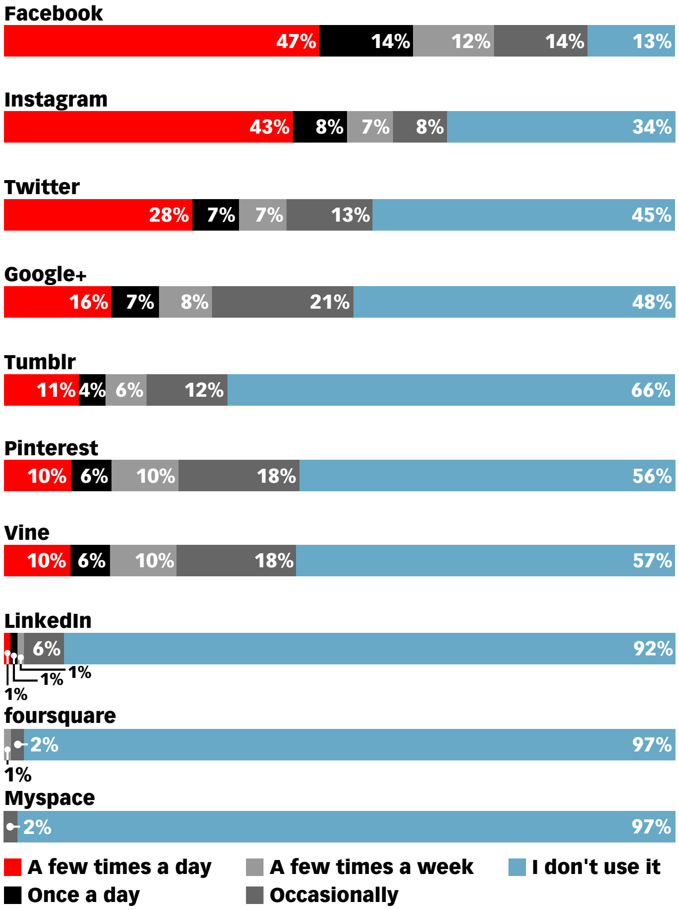
A similar verdict emerged in a June survey by Niche among members of its community and content network who graduated from high school in 2014. Facebook led other social venues in percentage of respondents who used the network daily or multiple times a day.

Social Network Sites Used by 2014 US High School Graduates, by Frequency

% of respondents



Note: among members of the Niche community; numbers may not add up to 100% due to rounding
Source: Niche, "Class of 2014," June 18, 2014

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None of this rebuts the likelihood that teens now spend less time on Facebook than when there were few alternatives—or that the way they use it has evolved. A recurring observation of teen marketing professionals is that its role has become more utilitarian. "It's how they connect with teachers, with schools, with teams," said Stephanie Retblatt, who holds the title "chief brainiac" at youth marketing and research firm Smarty Pants. While older Facebookers are "sharing themselves and their lives," teens are apt to use it to check on "when is Ultimate Frisbee practice this week, or what was the homework assignment for tonight."

ALL THE NON-FACEBOOKS

At a life stage when experimentation comes naturally, teens are obvious candidates to try non-Facebook social options. The rise in smartphone penetration also equips them to use social channels that are largely or wholly mobile.

Twitter got a slow start among teens and remains less popular among them than with young adults. Adoption has risen steadily, though, and eMarketer estimates that one-quarter of online 12- to 17-year-olds will be Twitter users this year.

US Twitter User Metrics, by Age, 2013-2019

	2013	2014	2015	2016	2017	2018	2019
Twitter users (millions)							
0-11	1.1	1.3	1.4	1.6	1.7	1.9	2.0
12-17	5.0	5.6	6.1	6.5	6.9	7.2	7.4
18-24	10.0	11.1	11.8	12.4	12.9	13.3	13.5
25-34	9.4	10.5	11.4	12.4	13.3	14.3	14.9
35-44	7.1	7.9	8.7	9.5	10.4	11.2	12.0
45-54	5.6	6.2	6.8	7.3	7.9	8.5	8.8
55-64	3.3	3.7	4.1	4.6	5.0	5.5	5.8
65+	1.7	2.2	2.7	3.3	3.9	4.3	4.7
Total	**43.2**	**48.4**	**53.1**	**57.6**	**62.0**	**66.1**	**69.1**
Twitter user penetration (% of internet users in each group)							
0-11	5.0%	5.4%	5.8%	6.2%	6.6%	7.1%	7.6%
12-17	20.7%	23.0%	25.1%	27.0%	28.5%	29.7%	30.6%
18-24	34.0%	37.4%	39.4%	41.4%	43.0%	44.1%	44.8%
25-34	24.0%	26.1%	27.7%	29.3%	30.9%	32.3%	33.3%
35-44	19.6%	21.5%	23.4%	25.3%	27.2%	29.1%	30.5%
45-54	14.6%	16.1%	17.6%	19.0%	20.7%	22.4%	23.6%
55-64	10.3%	11.3%	12.2%	13.2%	14.2%	15.2%	16.1%
65+	6.9%	8.1%	9.0%	9.9%	10.8%	11.6%	12.3%
Total	**17.6%**	**19.1%**	**20.4%**	**21.7%**	**22.9%**	**24.1%**	**25.0%**
Twitter user share (% of total)							
0-11	2.6%	2.7%	2.7%	2.7%	2.7%	2.8%	2.9%
12-17	11.6%	11.5%	11.5%	11.4%	11.2%	10.9%	10.8%
18-24	23.1%	23.0%	22.3%	21.6%	20.9%	20.1%	19.5%
25-34	21.8%	21.6%	21.5%	21.5%	21.5%	21.6%	21.6%
35-44	16.5%	16.3%	16.4%	16.5%	16.7%	17.0%	17.3%
45-54	12.9%	12.7%	12.7%	12.7%	12.7%	12.8%	12.8%
55-64	7.6%	7.6%	7.8%	7.9%	8.1%	8.3%	8.4%
65+	3.9%	4.5%	5.2%	5.8%	6.2%	6.6%	6.9%

Note: internet users who access their Twitter account via any device at least once per month
Source: eMarketer, Feb 2015

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Shedding light on the frequency of teens' Twitter usage, the Niche survey of 2014 high school graduates found 35% using it at least once a day.

Twitter has been overtaken as a teen destination by Instagram, which has a visual focus that has strong appeal to smartphone teens. eMarketer estimates that about nine in 10 smartphone users in the 12-to-17 age group will be Instagram users this year.

US Instagram User Penetration, by Age, 2013-2019

% of smartphone users in each group

	2013	2014	2015	2016	2017	2018	2019
0-11	15.1%	20.7%	19.9%	20.1%	20.7%	21.4%	22.3%
12-17	67.0%	87.4%	89.6%	90.9%	90.7%	91.1%	91.7%
18-24	39.0%	53.1%	57.5%	61.4%	64.9%	68.2%	71.1%
25-34	37.1%	48.1%	53.1%	57.5%	61.1%	63.3%	65.2%
35-44	17.1%	27.8%	32.0%	34.6%	37.1%	39.6%	40.2%
45-54	15.1%	21.4%	25.2%	27.5%	29.6%	30.9%	32.3%
55-64	13.2%	19.2%	22.0%	24.7%	26.5%	28.3%	28.8%
65+	6.1%	9.1%	10.5%	12.0%	12.3%	12.5%	12.4%
Total	**27.4%**	**37.6%**	**40.7%**	**43.1%**	**45.0%**	**46.4%**	**47.1%**

Note: internet users who access their Instagram account via any device at least once per month
Source: eMarketer, Feb 2015

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They use it often, too. In Niche's polling, 51% identified themselves as at-least-daily Instagram users, including 43% who use it multiple times per day.

Snapchat's rise further illustrates the confluence of social, visual and mobile. In a December 2014 "The Year in Social Media" roundup by youth marketing specialist Ypulse, 53% of 14- to 18-year-olds were identified as Snapchat users. In July 2014 polling by research firm NuVoodoo, 36.8% of the 14-to-17 group reported using it at least weekly.

The videocentric Vine also taps into teens' social-visual-mobile predilections. Polling in Q2 2014 by GlobalWebIndex found 25% of US 16- to 19-year-olds were users during the past month.

Notwithstanding its visual orientation, Pinterest generates less interest among teens than among young adults—or even middle-aged adults. eMarketer estimates that the percentage of online 12- to 17-year-olds who use Pinterest will barely break into double digits this year, at 11.5%, though decent growth is expected in the next several years.

US Pinterest User Metrics, by Age, 2013-2019

	2013	2014	2015	2016	2017	2018	2019
Pinterest users (millions)							
0-11	0.0	0.1	0.1	0.2	0.2	0.3	0.3
12-17	0.5	1.7	2.8	3.5	4.1	4.6	5.1
18-24	7.6	8.9	9.3	9.6	9.8	9.9	10.0
25-34	8.0	9.6	10.7	11.4	12.1	12.8	13.4
35-44	8.0	8.8	9.5	10.0	10.5	11.0	11.3
45-54	4.9	5.3	5.8	6.1	6.5	6.8	7.1
55-64	3.8	4.9	5.6	6.0	6.4	6.7	7.0
65+	1.9	2.9	3.4	3.8	4.3	4.7	4.9
Total	**34.9**	**42.3**	**47.1**	**50.7**	**53.9**	**56.8**	**59.3**
Pinterest user penetration (% of internet users in each group)							
0-11	0.1%	0.3%	0.6%	0.8%	0.9%	1.0%	1.1%
12-17	2.0%	7.0%	11.5%	14.5%	17.0%	19.0%	21.0%
18-24	26.0%	30.0%	31.0%	32.0%	32.5%	33.0%	33.3%
25-34	20.5%	24.0%	26.0%	27.0%	28.0%	29.0%	30.0%
35-44	22.0%	24.0%	25.5%	26.5%	27.5%	28.5%	29.0%
45-54	13.0%	14.0%	15.0%	16.0%	17.0%	18.0%	19.0%
55-64	12.0%	15.0%	16.5%	17.5%	18.3%	18.8%	19.4%
65+	8.0%	10.5%	11.0%	11.5%	12.0%	12.5%	12.8%
Total	**14.2%**	**16.7%**	**18.1%**	**19.1%**	**19.9%**	**20.7%**	**21.4%**
Pinterest user share (% of total)							
0-11	0.1%	0.2%	0.3%	0.4%	0.4%	0.5%	0.5%
12-17	1.4%	4.0%	5.9%	6.9%	7.6%	8.1%	9.0%
18-24	21.9%	21.1%	19.7%	18.9%	18.1%	17.5%	17.6%
25-34	23.0%	22.7%	22.7%	22.5%	22.4%	22.5%	23.6%
35-44	23.0%	20.9%	20.2%	19.6%	19.4%	19.3%	20.0%
45-54	14.2%	12.6%	12.2%	12.1%	12.0%	12.0%	12.5%
55-64	11.0%	11.7%	11.8%	11.9%	11.9%	11.9%	12.4%
65+	5.5%	6.8%	7.1%	7.6%	8.0%	8.2%	8.7%

Note: internet users who access their Pinterest account via any device at least once per month
Source: eMarketer, Feb 2015

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Tumblr presents a different situation. It is more popular among teens than among older-than-millennial adults. But while anecdotal evidence suggests it has a devoted core audience, its total teen user base is small. eMarketer estimates that 12.0% of online 12- to 17-year-olds will use it this year.

Though likely to increase in the US, as it has elsewhere, WhatsApp's foothold among the country's teens is also small. Niche's and NuVoodoo's surveys both found WhatsApp penetration at around one in 10 among teen respondents.

No single network or app is likely to become "the next Facebook" for teens, as they increasingly use different services for different purposes. For millennials, Facebook established itself as the place where "you pulled together all of your different worlds"—school friends, neighborhood friends, etc., said Sharalyn Orr, executive director at Frank N. Magid Associates. Teens approach digital socializing in another way. "Part of what's happening with all these different social networks is that they're separating those things out again."

Marketers want to pursue teens into new social venues, but it requires tact. "When you're on these different platforms, you have to know the tone, the language and the type of engagement you're going to have," said Gregg Witt, chief engagement officer/partner at Immersive Youth Marketing. That's doubly true of social spaces teens feel they have curated for themselves. "If we do go into their more sensitive space—these smaller, more-private networks—what we want to do is add value," said Clint! Runge, managing director at youth marketing agency Archrival. "If we come barging in and being the bull in the china shop, we're just going to keep chasing them."

MOBILE TEENS

A couple years back, teens were an anomaly in mobile usage—digital natives whose below-average smartphone penetration left them less digital than their elders. A surge in teens' smartphone adoption has now narrowed this gap, and teens make the most of their access.

eMarketer estimates that 88.0% of 12- to 17-year-olds will be mobile phone owners this year. Within this group, 78.5% are expected to have smartphones.

US Smartphone User Penetration, by Age, 2013-2019
% of mobile phone users in each group

	2013	2014	2015	2016	2017	2018	2019
0-11	23.0%	28.7%	35.3%	41.0%	45.0%	47.1%	48.9%
12-17	57.3%	71.0%	78.5%	84.0%	89.0%	91.0%	92.0%
18-24	77.4%	85.2%	90.1%	94.9%	98.0%	98.4%	99.0%
25-34	75.5%	84.0%	90.2%	95.2%	98.0%	98.4%	98.9%
35-44	72.5%	81.6%	87.7%	92.0%	94.0%	94.8%	96.1%
45-54	57.8%	66.9%	75.8%	82.8%	88.3%	92.8%	95.9%
55-64	49.5%	59.1%	67.6%	75.7%	80.9%	85.5%	89.5%
65+	30.6%	36.6%	40.7%	44.4%	48.5%	51.5%	54.0%
Total	**59.3%**	**67.6%**	**73.8%**	**79.0%**	**82.7%**	**84.8%**	**86.5%**

Note: individuals who own at least one smartphone and use the smartphone(s) at least once per month
Source: eMarketer, Feb 2015

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With smartphone penetration now high among adults, hand-me-down phones for teens are increasingly likely to be smartphones. And parents are getting comfortable with the idea of their teens having one. In July 2014 polling by TNS Global for FatWallet, two-thirds of parents termed it "practical" for teens to have a smartphone.

Practical or otherwise, smartphones give an on-the-go aspect to teens' internet usage. eMarketer estimates that 80.8% of mobile phone users ages 12 to 17 will be mobile phone internet users this year, a jump from 59.4% in 2013. (Internet usage in this context is defined to exclude SMS/MMS activity.)

Rising household tablet ownership gives many teens access to those devices. eMarketer estimates that 62.1% of 12- to 17-year-olds will be tablet users this year. Growth has slowed, though, and just two-thirds are expected to be tablet users in 2019.

US Tablet User Metrics, by Age, 2013-2019

	2013	2014	2015	2016	2017	2018	2019
Tablet users (millions)							
0-11	12.0	14.5	15.7	16.4	17.1	17.7	18.2
12-17	12.9	14.8	15.5	15.9	16.2	16.5	16.7
18-24	15.3	17.1	18.1	18.3	18.4	18.5	18.6
25-34	21.5	24.0	25.0	25.8	26.5	27.2	27.8
35-44	22.6	24.3	25.7	27.0	27.9	28.7	29.5
45-54	21.3	22.2	22.8	23.3	23.8	24.3	24.7
55-64	15.9	18.1	19.2	20.7	21.7	22.6	23.2
65+	10.7	13.9	16.8	19.0	20.5	21.4	22.1
Total	**132.2**	**148.9**	**158.8**	**166.4**	**172.1**	**176.8**	**180.9**
Tablet user penetration (% of internet users)							
0-11	52.6%	60.6%	63.6%	65.2%	66.6%	67.1%	69.0%
12-17	53.5%	61.0%	64.0%	65.5%	66.8%	67.9%	68.7%
18-24	52.0%	57.5%	60.5%	61.0%	61.3%	61.6%	61.9%
25-34	55.0%	60.0%	60.9%	61.1%	61.4%	61.6%	62.1%
35-44	62.0%	66.0%	69.0%	71.9%	73.3%	74.4%	75.4%
45-54	56.0%	58.0%	59.3%	60.7%	62.3%	64.1%	66.0%
55-64	50.0%	55.0%	57.0%	60.0%	61.6%	63.0%	64.2%
65+	44.2%	51.0%	55.0%	56.9%	57.0%	57.2%	57.3%
Total	**53.8%**	**58.8%**	**61.1%**	**62.7%**	**63.6%**	**64.4%**	**65.3%**
Tablet user penetration (% of population)							
0-11	24.5%	29.9%	32.2%	33.6%	35.0%	36.2%	37.3%
12-17	51.9%	59.2%	62.1%	63.5%	64.8%	66.0%	66.8%
18-24	48.6%	54.4%	58.1%	59.2%	60.0%	60.4%	60.7%
25-34	50.3%	55.2%	56.6%	57.6%	58.3%	59.1%	59.7%
35-44	55.8%	60.1%	63.5%	66.6%	68.2%	69.2%	70.2%
45-54	48.7%	51.0%	52.8%	54.4%	56.1%	58.0%	59.8%
55-64	40.5%	45.1%	47.0%	49.7%	51.4%	53.0%	54.1%
65+	23.9%	30.0%	35.0%	38.5%	40.1%	40.5%	40.6%
Total	**41.8%**	**46.7%**	**49.4%**	**51.4%**	**52.7%**	**53.7%**	**54.5%**
Tablet user share (% of total)							
0-11	9.1%	9.8%	9.9%	9.8%	9.9%	10.0%	10.1%
12-17	9.8%	9.9%	9.8%	9.5%	9.4%	9.3%	9.2%
18-24	11.5%	11.5%	11.4%	11.0%	10.7%	10.5%	10.3%
25-34	16.3%	16.1%	15.7%	15.5%	15.4%	15.4%	15.4%
35-44	17.1%	16.3%	16.2%	16.2%	16.2%	16.2%	16.3%
45-54	16.1%	14.9%	14.3%	14.0%	13.8%	13.7%	13.6%
55-64	12.0%	12.1%	12.1%	12.4%	12.6%	12.8%	12.8%
65+	8.1%	9.3%	10.6%	11.4%	11.9%	12.1%	12.2%

Note: individuals who use a tablet at least once per month
Source: eMarketer, Feb 2015

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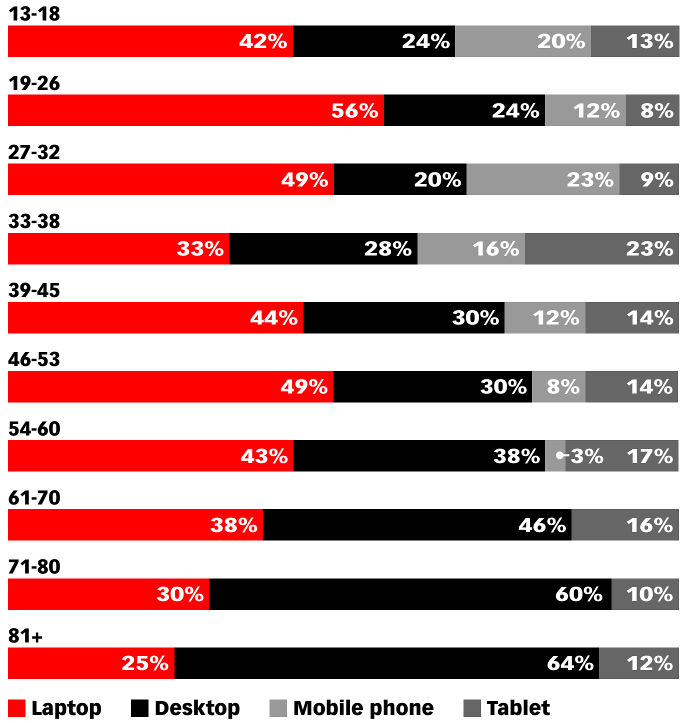
Though often lumped in with desktop PCs in discussions of device usage, laptops give teens further mobility. In Camp Mobile's survey, 65% of 13- to 17-year-olds had one. Amid all the attention given to smartphones, the importance laptops have for teens may be overlooked. In The Relevancy Group's March 2014 survey, 42% of 13- to 18-year-olds cited the laptop as their primary internet access device. While the numbers have likely swung more toward phones since then, laptops are plainly a major element in teens' digital activity.

Primary Internet Access Device According to US Internet Users, by Age, March 2014

% of respondents in each group



Note: n=1,011; numbers may not add up to 100% due to rounding
Source: The Relevancy Group, "The Connected Mobile Consumer: Consumer Mobile Behavior and Attitudes 2014" as cited by Marketer Quarterly, May 2014

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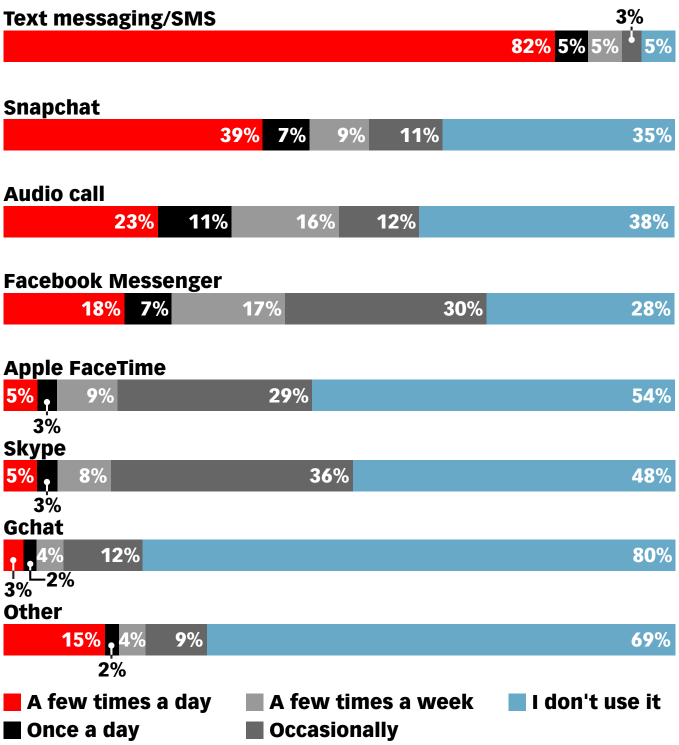
By contrast, ereaders generate scant interest. eMarketer's estimate puts ereader penetration among 12- to 17-year-olds in the low single digits—at 2.3% of the population in 2015—for the foreseeable future.

The communication method teens care most about is texts from friends. In the Niche survey, about eight in 10 respondents said they use text messaging multiple times a day.

Communications Services Used by 2014 US High School Graduates, by Frequency
% of respondents



Note: among members of the Niche community; numbers may not add up to 100% due to rounding
Source: Niche, "Class of 2014," June 18, 2014

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Texting, rather than a conventional social network, is where much of teens' social interaction unfolds. "The sheer amount of texting, especially vs. actually using the phone itself and hearing the voice, is staggering," said Retblatt.

TEENS' DIGITAL DIVERSIONS

Parents of today's teens got acquainted with digital media when the internet was mostly text. Coming of age with Web 2.0, teens have experienced it as a gigantic TV-plus-radio channel. It also serves them as a venue for playing video games, or even (to the astonishment of nongamers) for watching other people play. Collectively, digital media now feeds much of US teens' appetite for entertainment.

WATCHING . . .

eMarketer estimates that 93.0% of online 12- to 17-year-olds will be digital video viewers this year, well above the figure (78.6%) for the whole online population in the US.

US Digital Video Viewer Metrics, by Age, 2013-2019

	2013	2014	2015	2016	2017	2018	2019
Digital video viewers (millions)							
0-11	15.5	16.8	17.5	18.1	18.7	19.2	19.5
12-17	21.8	22.3	22.5	22.5	22.6	22.6	22.6
18-24	27.3	28.3	28.6	28.8	28.9	28.9	28.9
25-34	34.9	36.0	37.0	38.0	38.9	39.8	40.5
35-44	30.9	32.0	32.8	33.4	33.9	34.3	35.0
45-54	28.9	29.5	30.0	30.5	30.8	31.2	30.8
55-64	18.1	19.7	20.6	21.4	22.2	23.0	23.3
65+	8.7	11.2	15.1	17.6	19.7	21.3	22.8
Total	**186.2**	**195.8**	**204.2**	**210.4**	**215.7**	**220.2**	**223.5**
Digital video viewer penetration (% of internet users in each group)							
0-11	68.0%	70.0%	71.0%	72.0%	73.0%	73.0%	74.0%
12-17	90.0%	92.0%	93.0%	93.0%	93.0%	93.0%	93.0%
18-24	93.0%	95.0%	95.6%	96.0%	96.0%	96.0%	96.0%
25-34	89.0%	90.0%	90.1%	90.0%	90.0%	90.0%	90.5%
35-44	85.0%	87.0%	88.0%	89.0%	89.0%	89.0%	89.5%
45-54	76.0%	77.3%	78.2%	79.3%	80.7%	82.3%	82.5%
55-64	57.0%	60.0%	61.0%	62.0%	63.0%	64.0%	64.5%
65+	36.0%	41.0%	49.7%	52.8%	55.0%	57.0%	59.0%
Total	**75.7%**	**77.4%**	**78.6%**	**79.2%**	**79.7%**	**80.2%**	**80.7%**
Digital video viewer share (% of total)							
0-11	8.3%	8.6%	8.6%	8.6%	8.7%	8.7%	8.7%
12-17	11.7%	11.4%	11.0%	10.7%	10.5%	10.2%	10.1%
18-24	14.7%	14.4%	14.0%	13.7%	13.4%	13.1%	12.9%
25-34	18.7%	18.4%	18.1%	18.1%	18.0%	18.1%	18.1%
35-44	16.6%	16.4%	16.1%	15.9%	15.7%	15.6%	15.7%
45-54	15.5%	15.1%	14.7%	14.5%	14.3%	14.2%	13.8%
55-64	9.7%	10.1%	10.1%	10.2%	10.3%	10.4%	10.4%
65+	4.7%	5.7%	7.4%	8.4%	9.2%	9.7%	10.2%

Note: internet users who watch digital video content via any device at least once per month
Source: eMarketer, Feb 2015

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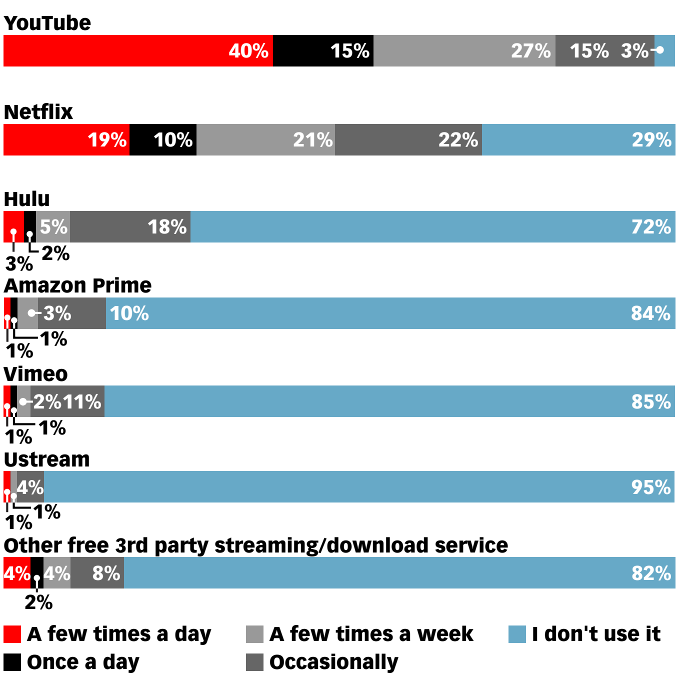
Spread across multiple devices and genres, teens' viewing of digital video consumes lots of time. In The Futures Company survey, 12- to 19-year-olds averaged a weekly 3.1 hours watching TV shows via desktop/laptop, 2.9 hours watching TV shows through a streaming service like Netflix and 1.6 hours watching streaming movies on a desktop/laptop. And that leaves aside the time (such as 1.7 weekly hours watching TV on a mobile device) spent viewing video on smartphones and tablets.

YouTube has helped make digital video a teen staple. In an April 2014 survey for real estate development firm Forest City Enterprises, the proportion of teens and young adults saying they use YouTube daily (51.6%) matched the sum of those saying they use Instagram and Twitter as often (27.7% and 23.8%, respectively). Niche's survey found Netflix also making inroads with teens, though less than YouTube.

Video Services Used by 2014 US High School Graduates, by Frequency
% of respondents



Note: among members of the Niche community
Source: Niche, "Class of 2014," June 18, 2014
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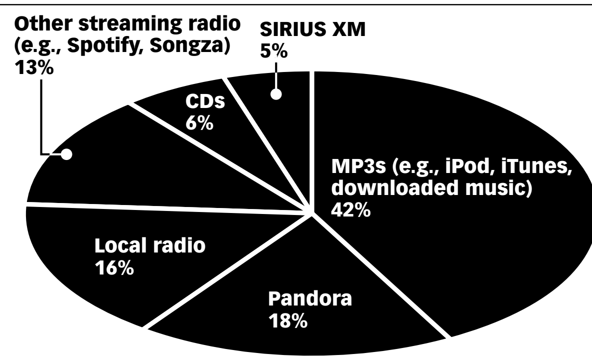
One reflection of YouTube's standing with US teens emerged from a July 2014 survey for Variety. Respondents ages 13 to 18 were asked to rate some YouTube stars and mainstream celebrities on qualities like authenticity and approachability, yielding an overall ranking of celebs deemed most influential for teens. The top scores mainly went to the YouTubers (including such unknown-to-most-adults luminaries as comedy team Smosh and The Fine Brothers), putting them ahead of Hollywood fixtures like Jennifer Lawrence and Seth Rogen.

LISTENING . . .

The fall 2014 round of a semiannual poll by Piper Jaffray got a sense of how new technology shapes teens' consumption of music. CDs accounted for just 6% of the time they spend listening; MP3s accounted for 42%.

Share of Time Spent Listening to Music Among US Teens, by Platform, Sep 2014
% of total



Source: Piper Jaffray, "Taking Stock with Teens," Oct 7, 2014
181574 www.eMarketer.com

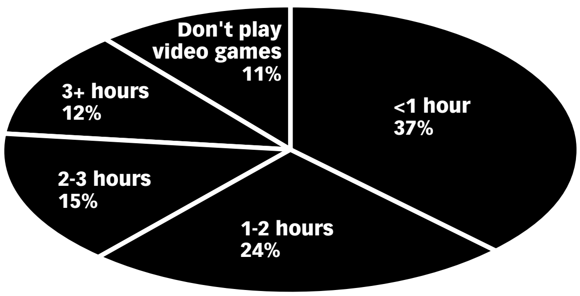
As the chart also shows, Piper Jaffray found Pandora occupying easily the biggest share of teens' time with music via streaming radio. That dovetails with Niche's polling, in which 77% of music streaming respondents reported using Pandora vs. 31% each for Spotify and iHeartRadio.

If a piece of music is unavailable for streaming, many teens will do without it for the time being. When Nielsen in September 2014 asked respondents what they would do if they couldn't access some music by streaming, 61% of teens said they would find something else or wait until it did become available to stream.

AND PLAYING

It is possible to find teens who do not play video games, but they are a rarity. In the Northeastern University survey, just 11% said they are nonplayers.

Daily Time Spent Playing Video Games According to US Teens, Oct 2014
% of respondents



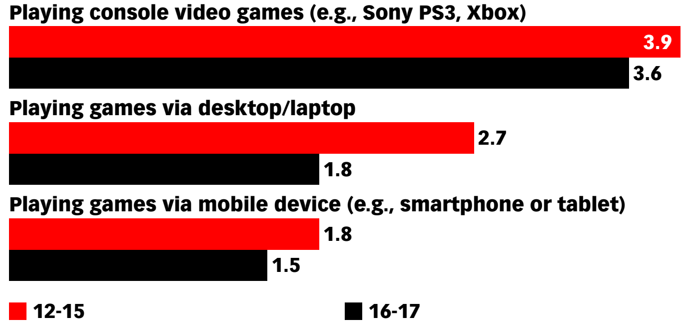
Note: ages 16-19; includes games played online or offline; numbers may not add up to 100% due to rounding
Source: Northeastern University, "Portrait of Generation Z," Nov 18, 2014
182927 www.eMarketer.com

Polling for Scholastic in August-September 2014 found some variation between older and younger teens in frequency of gaming. Fifty-nine percent of 12- to 14-year-olds said they "play games or apps on any kind of electronic device" at least five days a week vs. 45% of those ages 15 to 17.

Amid the proliferation of devices on which games can be played, consoles remain important. In Camp Mobile's survey, 60% of 13- to 17-year-olds reported owning one. And those devices do not lie idle, judging by Nielsen's Q3 2014 finding that 12- to 17-year-olds were using game consoles about 20 hours per month on average.

The Futures Company survey took a more comprehensive look at time spent gaming on various devices. Consoles accounted for the largest share, but computers and mobile devices added considerably to the total.

Weekly Time Spent Gaming Among US Teen Internet Users, by Age and Platform, Feb 2014
hours



Note: in the past 7 days
Source: The Futures Company, "The TRU Youth Monitor - Spring 2014," Jan 22, 2015
184755 www.eMarketer.com

While occupying much of teens' time, games garner a modest share of their spending. Piper Jaffray found teens devoting an average of 7% of their expenditures to video games—one-third the size of the share going to clothing.

OLD-BUT-NOT-DEAD MEDIA

Digital though teens are, their media consumption does not begin and end online. An October 2014 white paper by youth marketing agency Fuse led off with this declaration (including the all-caps "NOT"): "Traditional media usage is NOT dead among youth. While digital media is convenient and frequently free, two traditional media are still very relevant: TV and print."

Nielsen's Q3 2014 report on screen usage found 12- to 17-year-olds averaging 89 hours, 13 minutes a month watching "traditional television." That is considerably below the figure (141 hours, 19 minutes) for the total population ages 2 and older, and lower than the figures for teens in predigital days. Nevertheless, 89-plus hours a month is a big chunk of time by any measure.

As such, TV is a medium where marketers can still target teens. "It's not an ineffective way to reach them," said Samara Anderson, retail strategist at ad agency redpepper. "It's just, how do you create the message that matches up with the context in which they're also learning about your brand on their phone or their iPad or whatever that may be?"

Part of TV viewing's appeal is the sociability it entails. As Bill Carter, a partner at Fuse, put it, teens watch broadcast television "mainly due to the fact that it provides the opportunity to engage socially with family and/or friends while watching." This can also yield what Orr terms "separate togetherness." The family assembles in the living room, "but they're bringing their own devices," she said. "So they're having a group experience with whatever is playing there, but also having their own individual experiences as they're using their second screen."

In the age of multitasking, teens may not give the TV screen their full attention. But new- and old-media usage sometimes blends into a single experience. Orr mentions teens tweeting with friends while watching "Pretty Little Liars," a TV show with a teen following. "They want to be part of that social conversation and the excitement that's around it and to see it."

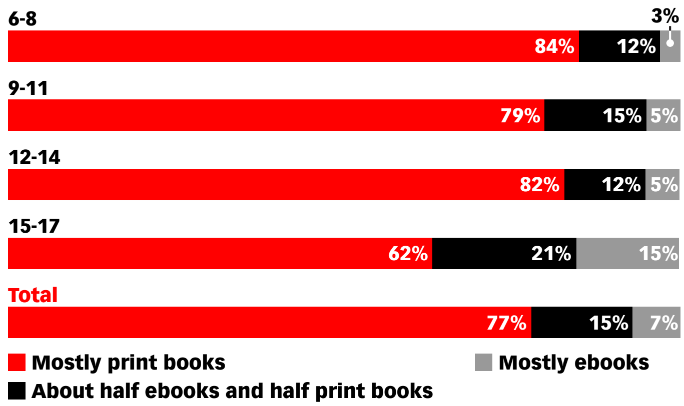
Teens often add new media to traditional media usage rather than simply replacing the old with the new. Radio illustrates this tendency. A fall 2014 round of Edison Research's "Share of Ear" research found 13- to 17-year-olds listening to streaming audio like Pandora and Spotify for more than an hour a day. But they were also spending nearly an hour with AM/FM radio (including broadcast and online streams).

Daily Time Spent Listening to Streaming Audio* vs. AM/FM Radio Among US Teen Consumers, Fall 2014**
mins

*Note: ages 13-17; *Pandora, Spotify, etc.; **broadcast radio and online streams of AM/FM stations*
Source: Edison Research, "Share of Ear," Jan 20, 2015
184543 www.eMarketer.com

As for print, Scholastic's survey documented a steady rise in the proportion of teens who read ebooks, which in 2014 reached 65% of 12- to 14-year-olds and 60% of 15- to 17-year-olds. But few prefer ebooks to print books. When they read books "for fun," a majority mostly use print.

US Child/Teen Ebook Readers Who Read Mostly Ebooks vs. Print Books for Fun, by Age, Sep 2014
% of respondents in each group



Note: among the 61% of respondents who have read an ebook; numbers may not add up to 100% due to rounding
Source: Scholastic Inc., "Kids & Family Reading Report, 5th Edition" conducted by YouGov, Jan 9, 2015
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TEENS AS CONSUMERS IN THE DIGITAL AGE

Amid their digital proclivities, teens are laggards in ecommerce. Lack of credit cards is a factor. But so is a preference for shopping in physical stores, often with friends in tow. Teens' digital interaction with brands is not confined to transacting purchases, though.

eMarketer estimates that 58.7% of online 14- to 17-year-olds in the US will be digital buyers this year, considerably lower than the figure (75.6%) for the entire 14-and-older population.

US Digital Buyer Penetration, by Age, 2013-2019
% of internet users in each group

	2013	2014	2015	2016	2017	2018	2019
14-17	54.8%	57.2%	58.7%	60.3%	61.3%	62.2%	62.9%
18-24	73.5%	75.1%	76.3%	77.6%	78.3%	78.9%	79.4%
25-34	74.5%	75.9%	77.0%	77.8%	79.0%	79.8%	80.9%
35-44	77.4%	78.7%	79.8%	81.3%	82.4%	83.3%	83.8%
45-54	76.2%	78.0%	79.5%	81.4%	83.8%	85.7%	87.8%
55-64	77.6%	78.5%	80.2%	82.7%	84.5%	86.2%	87.7%
65+	64.4%	65.9%	67.0%	67.9%	69.6%	71.2%	71.2%
Total	**73.0%**	**74.4%**	**75.6%**	**77.0%**	**78.4%**	**79.6%**	**80.5%**

Note: internet users who have made at least one purchase via any digital channel during the calendar year, including online, mobile and tablet purchases
Source: eMarketer, Feb 2015

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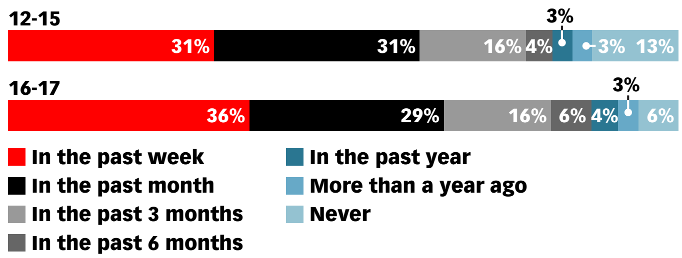
While people can compare notes online when shopping digitally, teens' desire to hang out with friends feeds a preference for shopping in stores. In Piper Jaffray's polling, 79% of girls said they preferred shopping in-store, vs. 58% of boys. "For teens, and I think teen girls especially, shopping is still a social experience, something you want to do together that is part of that teen experience," said Orr. According to Anderson, "They still crave a place where they can go and try things on and have a social experience and get that validation from their friends."

Nonetheless, ecommerce is working its way into teens' digital routines. When The Futures Company asked respondents about their most recent online purchase, more than three in 10 said they made it in the previous week.

Timeframe in Which US Teen Internet Users Made Their Most Recent Digital Purchase, by Age, Feb 2014
% of respondents in each group



Note: numbers may not add up to 100% due to rounding
Source: The Futures Company, "The TRU Youth Monitor - Spring 2014," Jan 22, 2015

184759 www.eMarketer.com

A limiting factor for many teens is the lack of credit cards. In Northeastern's survey, 28% said they have one. Though a parent will sometimes hand over a credit card for a worthy online purchase, less-worthy purchases may need to be made offline with the teen's own cash.

Of course, much of teens' digital interaction with brands is not transactional. But it often aims at lining up bargains. In The Futures Company's polling, nearly four in 10 teens endorsed the statement, "I often like or follow a brand or company for one-time deals." Three in 10 said that after connecting with a brand via social media, "I expect them to sometimes offer discounts or special promotions." If a brand seeks teens' engagement via social media, it needs to make this worth their while. "This could be in the form of discounts, unique information or partnering with a relevant, credible spokesperson," said Carter.

Sometimes, social endorsement of a brand has a more emotional angle. About three in 10 of The Futures Company respondents often like or follow a brand "just because I like their product and want people to know I own or use it." According to Rob Callender, the company's director of youth insights, "it's definitely the case that teens will use brands to showcase who they are and what they believe in and who they might either affiliate with or aspire to affiliate with."

The fact that teens dwell in digital venues does not make it easy for marketers to reach them there. These digital natives are adept at ignoring messages that don't instantly grab them. "The filters are so quick," said Witt. Part of the problem is that teens have been inundated with ads from online and offline channels. "This is a demographic that has been so exposed to marketing, and I think certainly has skepticism if not cynicism about marketing and marketing messages," said Chris Arnold, communications director for Chipotle. "So rather than trying to appeal to that customer group with really targeted marketing programs, we try to appeal to them simply by offering an experience that's relevant to them."

Teens' visual orientation creates an opening for marketers skilled at deploying strong images. "What it means for brands is that they have to have a great visual vocabulary," said Runge. "They have to have themselves set up so whenever they do speak in photographs and graphics and visual languages these could be attributed to the brand."

THE DOWNSIDE OF DIGITAL FOR TEENS

Since the teen years entail many tribulations and teens spend much of their time with digital media, it is unsurprising that digital activity has its downside for them.

Cyberbullying is a conspicuous example. Adults may wonder whether media coverage takes a handful of tragic incidents and inflates them into a mass phenomenon. However, teens themselves seem to find it a genuine problem. In a Cox Communications survey timed for October 2014's National Bullying Prevention Month, 54% of teens said they have witnessed online bullying. Twenty-four percent reported having been cyberbullied. Similarly, Northeastern found about six in 10 respondents agreeing that they know people who have been bullied or stalked online.

Attitudes Toward Internet-Related Activities/Issues According to US Teens, Oct 2014

% of respondents

Note: ages 16-19; numbers may not add up to 100% due to rounding
Source: Northeastern University, "Portrait of Generation Z," Nov 18, 2014

182926 www.eMarketer.com

Bullying is nothing new in teen life. "But because it's happening digitally, it feels more intense," said Retblatt. "There is no way to escape it."

This sometimes hostile digital environment is likely one reason why teens are growing more guarded about what they reveal online. Asked in Camp Mobile's survey to compare the amount they share online now vs. two years ago, 41% said they share less, including 19% saying "a lot less." Just 14% said they are sharing more online (3% "a lot more").

While adults may assume teens are oblivious to digital privacy, Callender stresses that privacy worries have long been endemic to that life stage. "Traditionally, the teen years have been a time for secrets, and privacy was something that was jealously guarded." While that tendency abated with the advent of social networking, it is reasserting itself in teens' adoption of social channels that are less public. Callender senses that Facebook itself is getting teen pressure to augment its privacy controls, "especially from younger teens who are going to places that by their nature offer more privacy."

Worries about privacy and cyberbullying alike have given impetus to anonymous messaging apps, such as Whisper and Yik Yak. Still, Niche's survey found few respondents had adopted such services thus far, though this could change as more teens become aware of them.

Privacy also arises as an issue for teens when marketers try to reach them digitally. "We've spent the last decade telling young people that internet strangers are dangerous and that any adult who reaches out directly is a creep," said danah boyd, principal researcher for Microsoft Research. This includes strangers who are marketers. "When marketers (or researchers) reach out to youth who are not looking to attract attention from marketers/researchers, not only is it intrusive, but it violates everything that youth have been taught, and they respond extraordinarily negatively."

Callender notes that the issue of intrusiveness is "important to everyone, not just teens. But I think that teens feel these domains are so much more specific to them and so much a part of their lives that brands have to be especially cognizant of the sense they're intruding on this sort of public-private space."

Teens are also alive to the fact that personal information has value to marketers, and there is some openness to a quid pro quo. But they must see a clear benefit for themselves. "It's definitely the balance between 'what am I getting and what am I giving up,'" said Anderson.

CONCLUSIONS

Teens are indeed avid social networkers. Many are trying out options beyond Facebook, especially as mobile-social chat services proliferate. But the notion that masses of teens have deserted Facebook does not stand up to scrutiny.

A surge in smartphone adoption has enlarged the mobile dimension of teens' digital activity. Though still less likely than young adults to have smartphones, teens are narrowing that gap. This augments the mobile aspect of activities ranging from social networking to gaming.

Digital sources now provide much of teens' entertainment. Digital video is a big part of this, and YouTube has become a major teen destination, even for music.

Teens who do not use video games are the exception. Consoles still play the predominant role in teens' gaming, but teens also spend ample time playing on computers and smartphones.

New media tends to supplement rather than simply replace traditional media. Most notably, teens still spend lots of time watching TV. Even print—including printed books!—retains a large teen following.

Teens engage in ecommerce, but less so than adults. And it's not just due to lack of credit cards, as many teens relish the camaraderie of shopping at physical stores.

EMARKETER INTERVIEWS

Chipotle Trusts Word-of-Mouth to Steer Marketing Strategy, Not TV or Promotions

Chris Arnold
Communications Director
Chipotle
Interview conducted on January 30, 2015

Visual Marketing Key in Helping Brands Attract Teens

Sharalyn Orr
Executive Director
Frank N. Magid Associates
Interview conducted on January 22, 2015

Samara Anderson
Retail Strategist
redpepper
Interview conducted on January 26, 2015

danah boyd
Principal Researcher
Microsoft Research
Interview conducted on January 22, 2015

Rob Callender
Director of Youth Insights
The Futures Company
Interview conducted on January 23, 2015

Bill Carter
Partner
Fuse
Interview conducted on January 26, 2015

Stephanie Retblatt
Chief Brainiac
Smarty Pants
Interview conducted on January 28, 2015

Clint! Runge
Managing Director
Archrival
Interview conducted on January 29, 2015

Gregg Witt
Chief Engagement Officer/Partner
Immersive Youth Marketing
Interview conducted on January 23, 2015

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