

Exhibit 154



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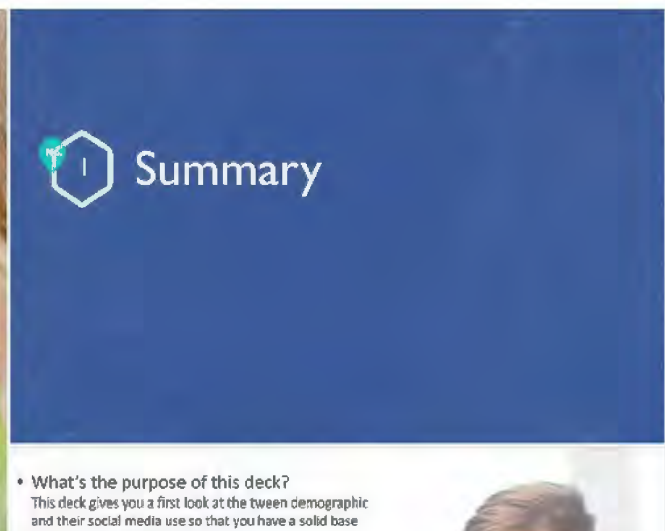
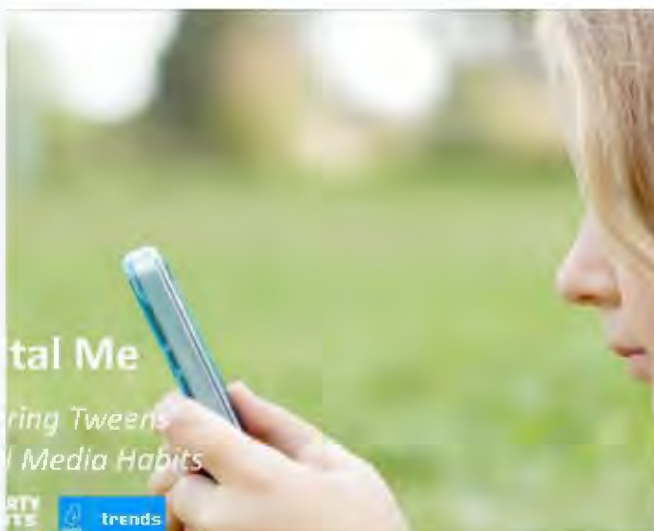
Tweens and social media

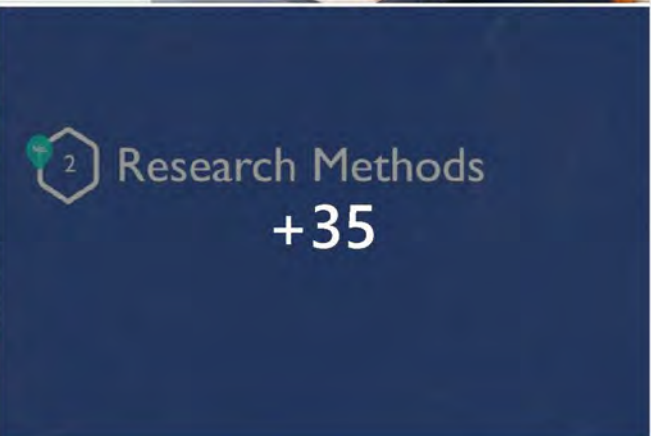
This deck is meant as an introduction to the tween demographic and their social media use.

- Tweens decide which app is for them based on the app's user base. The real driver for engagement on social media is entertainment and emotional connections, not communication.
- No existing social media app feels like it was really made for them.
- Tweens are herd animals, and want to find communities where they can fit in. They are particularly intrigued by products that
 - Highlight group experiences and feelings of belonging
 - Strengthen connections (not communication!) to a small circle of close friends
 - Use entertainment/interests as a starting point for interactive engagement (Tweens are super impatient, don't bore them by keeping them passive.)
 - De-emphasize self-presentation and instead highlight fitting in. (Tweens are soooo different from teens on this one.)

P.S. The findings in this report are based on a series of qualitative and quantitative studies over the past 1.5 years. Due to the sensitivity of the subject, not all findings and materials are included in this report. If you want to dig in further for your work on tweens, please reach out to me directly! We also have several more research initiative on the way, can't wait to share with you soon.

#tweens





13

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Comment

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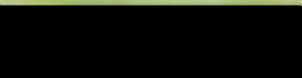
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Digital Me

*Exploring Tweens'
Social Media Habits*



Youth UX Research

● **Summary**

● **Research Methods**

● **Tweens' Digital Habits**

● **Tweens and Social Media Access**

● **Tweens and Social Media Apps**

● **Tweens and Social Media Needs**

● **What's Next**





Summary

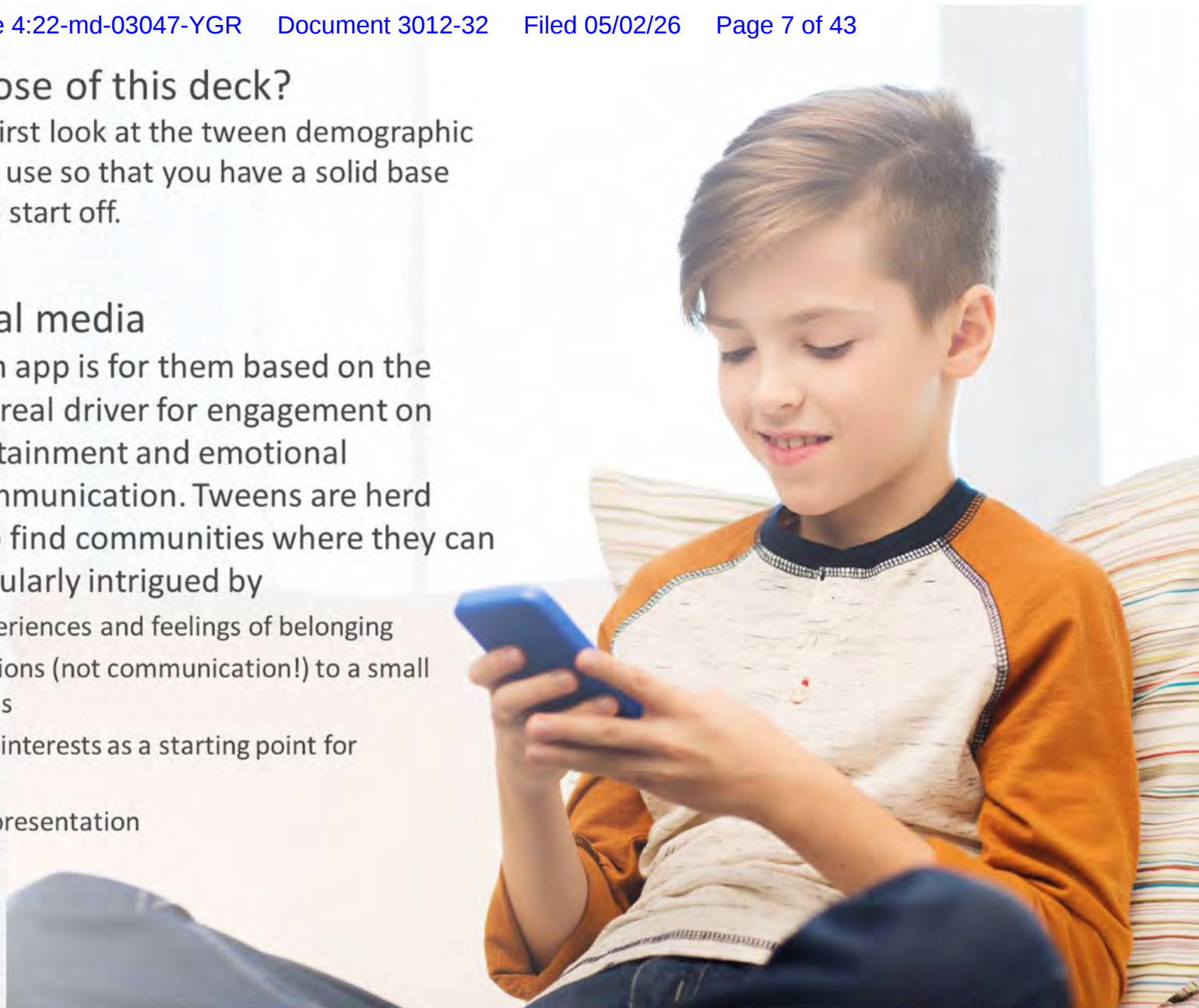
- **What's the purpose of this deck?**

This deck gives you a first look at the tween demographic and their social media use so that you have a solid base level understanding to start off.

- **Tweens and social media**

Tweens decide which app is for them based on the app's user base. The real driver for engagement on social media is entertainment and emotional connections, not communication. Tweens are herd animals, and want to find communities where they can fit in. They are particularly intrigued by

- Highlight group experiences and feelings of belonging
- Strengthen connections (not communication!) to a small circle of close friends
- Use entertainment/interests as a starting point for engagement
- De-emphasize self-presentation





Research Methods

- Qualitative research
 - 6 foundational understanding/in-home interviews (Jonesborough, TN and Charlotte, NC) in August 2017
 - 2 10 year-olds, 2 11 year-olds, 2 12 year-olds
 - With their own smartphone and own social media account
 - 12 parent/child interviews (Phoenix, AZ) in September 2017
- Quantitative research
 - Survey to n=275 11-12 year-olds (US) in April 2017
 - Survey to n=125 7-9 and n=125 10-12 year-olds in September 2016
 - Survey to n=1,050 10-12 year-olds and parents in March 2017 (by Instagram)
- This series of qualitative and quantitative research was checked against previously conducted FB internal and external tweens research. While results are directionally conclusive, %s should be taken with caution.
- The research summary presented in this report was also informed by additional tweens research from the past two years. Due to the sensitive nature of the subject, research findings, materials and raw data about tweens' social media usage are only available upon request.



Tweens' Digital Habits

Digital leisure is the norm.

- Tweens now mostly have their own phones, enabling them to access apps on the go.
- Their friends are increasingly on social media/using digital communication.
- They know what they are interested in and seek out interests online.
- They have a lot of in-person activities and feel stressed, leading them to want to relax online with “lean back” activities.



Source: SmartyPants Qualitative Study (directionally corroborated by Dubit Survey)

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Tweens start to have their own phones by the end of elementary school.

In elementary school, tablets are an obvious choice

- Kids in 3rd and 4th grades (ages 8 to 10) typically use these devices for **gaming**.
- They also use tablets for **watching videos** and **video chatting** and/or **communicating** with **family**.
- Some come to realize they can **interact with peers** through messaging apps.
- Almost everything **happens at home**, on WiFi.

"11 is the golden age for phones."
– 11yo boy

"I like playing Piano Tiles and Angry Birds on my phone."
– 10yo boy

In 5th grade, many tweens receive their first phones

- For the first time, they have something digital **all to themselves** – and can take it wherever they like.
- **Gaming** is still a big part of the mix, but **social media** becomes a part of their digital diets.
- And they're **connected wherever** they go.

Study (directionally corroborated by Dubit Survey)

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Digital communication with parents is utilitarian.

- Initially, the phone serves as the conduit between tweens and their parents – for utilitarian messaging.
 - With newfound freedom (middle school), 11-year-olds must let their parents know – typically through phone calls or texting:

"The initial purpose of getting her the phone in general is so we could communicate with her."
 – Dad of 10yo girl

When they
get to school
in the
morning

When they
leave school
in the
afternoon

When they
get home

Other plans
they'd like to
make with
friends



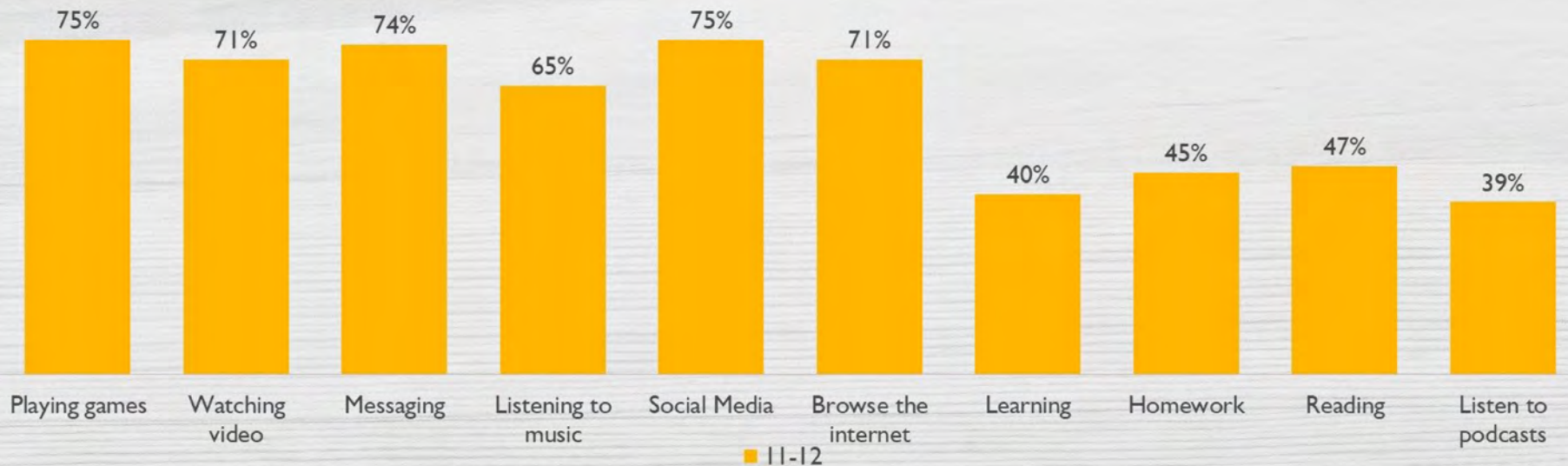
Source: SmartyPants Qualitative Study, Research Now Survey Nov 2016. Consider the last time you messaged (text or video) with [child]. What was the general content or purpose of that message/conversation? (n=1,035)

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Tweens are similar to older peers in their phone usage.

Tweens' usage becomes more social and outward oriented. Friends become a more important reference group than parents.



Source: Dabit Trends. AQ4.2. Which of the following list of activities do you use a smartphone for?
(Base: US Wave 275 (11-12))

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But, even with newfound freedoms, tweens are still most at home in the analog world. In-person communication is preferred.

- As tweens hear about the newest/latest/greatest apps from friends, they quickly fill their devices with gaming, messaging and social media apps.
- However, this connectivity doesn't replace – nor does it outshine – good, old-fashioned face-to-face hanging out.

A photograph of three tweens (two boys and one girl) smiling and talking to each other. The boy on the left is wearing a blue jacket and a backpack. The boy in the middle is wearing a striped shirt. The girl on the right is wearing an orange shirt. They are all looking at each other and smiling.

"[If I had a crush on someone] I would message them or just tell them in person."
– 10yo boy

"My friend lives close by...we like to jump on the trampoline."
– 12yo girl

"I usually like to talk to my friends in person."
– 10yo girl

Source: SmartyPants Qualitative Study Collection, powered by Digits Survey

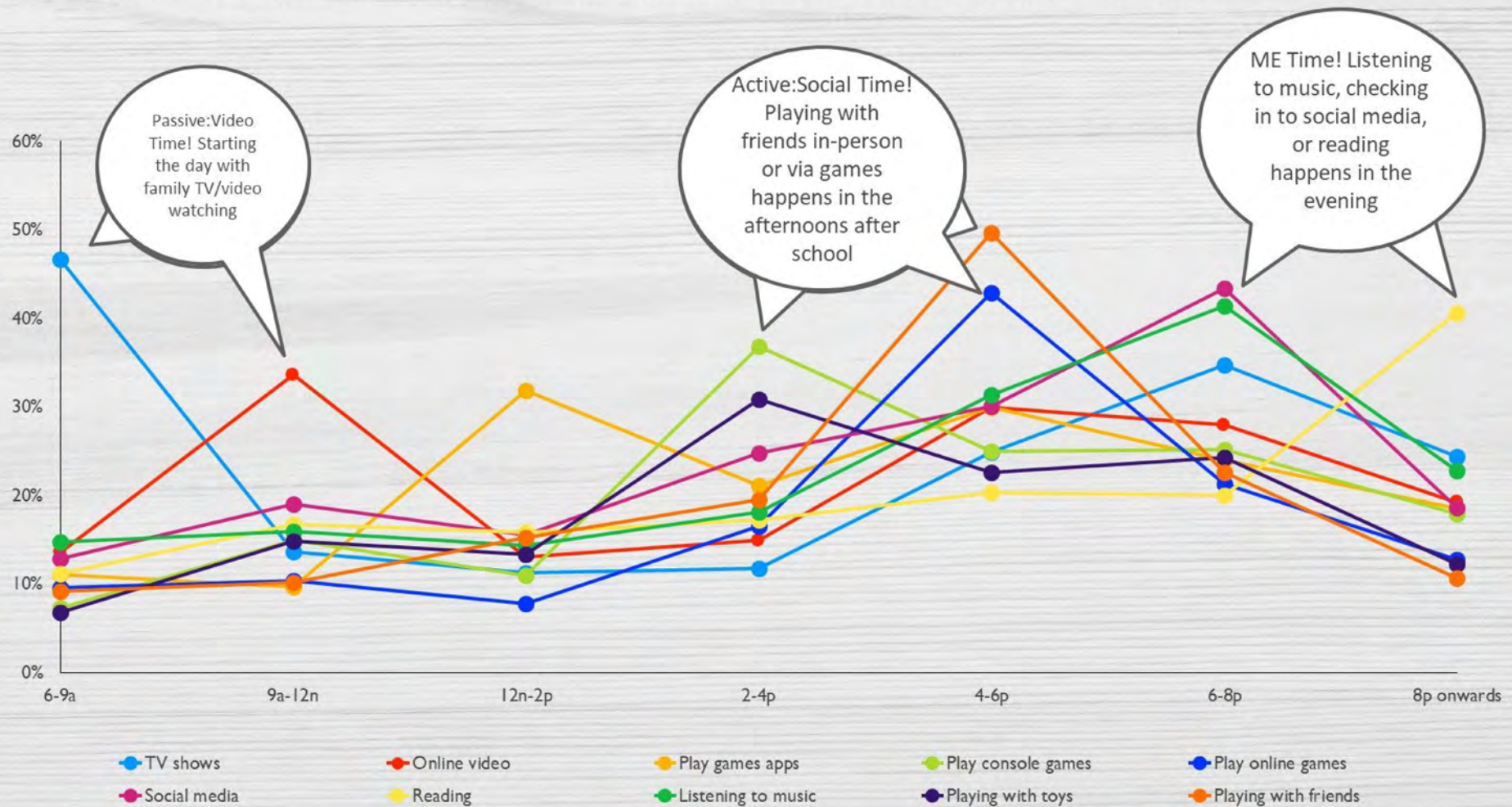
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Tweens' digital habits show passive → active → me patterns

Digital habits are entertainment driven and made to fit into tweens' offline schedules.



Source: Dubit Trends. AQ5.3. Now we'd like you to tell us the times of day that you normally do [text-sub: your child normally does] these activities.
(Base: US Wave 6 275)

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Tweens and Social Media Access

Signing up for social media is a given.

- From older siblings/cousins to peers with older siblings to the news, tweens know what social media is way before they actually start dabbling. Their engagement is really a matter of “when,” not “if.”
- The specific platforms are chosen based on what’s new and being discussed at school – whatever is hot is what’s downloaded. It has to be fun and entertaining first and foremost.
- Whether or not they stay engaged with a specific social media platform depends on whether they are able to deepen existing friendships or create emotional bonds in addition to having fun.



“[I found out about Snapchat] because most of my friends use it.”
– 12yo boy

“My sister introduced me to [Snapchat] last year.”
– 10yo girl

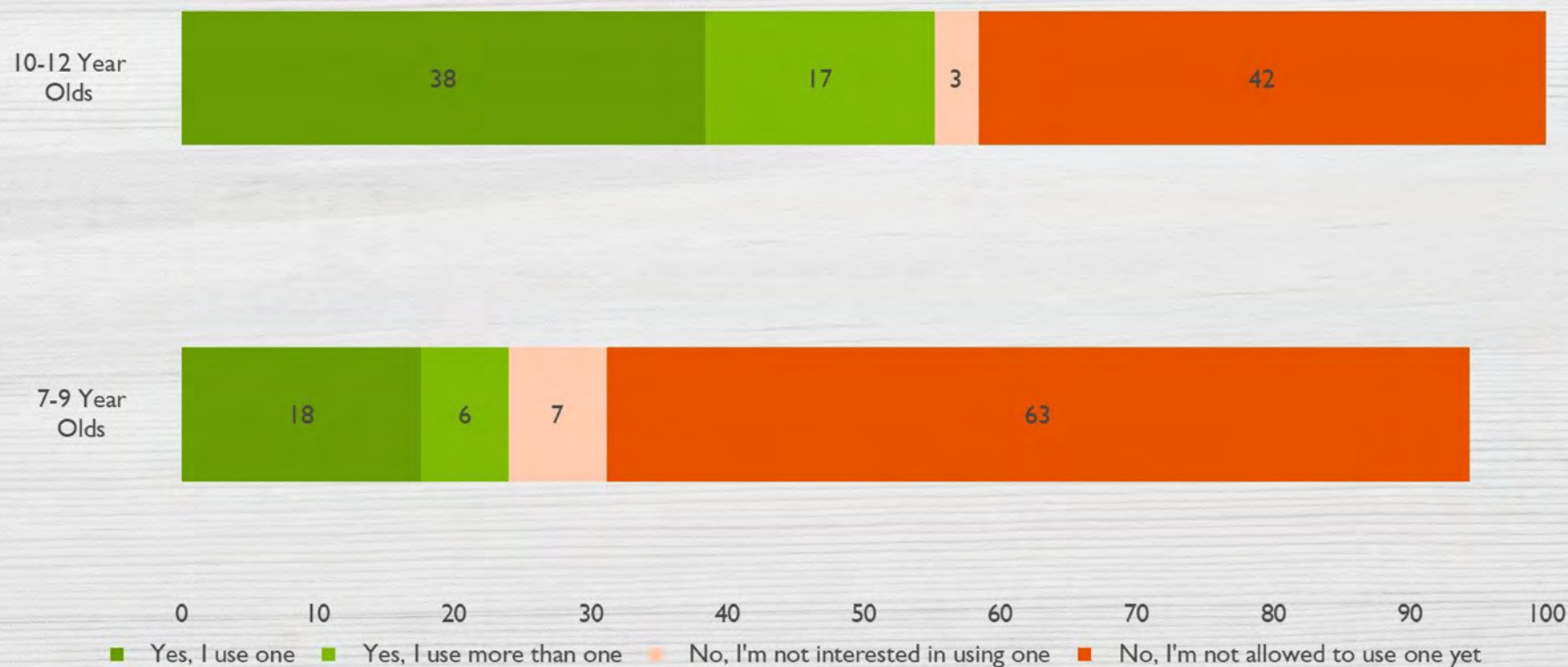
Sources: SmartyPants Qualitative Study (Aug 2017) and ER Internal Qualitative Research (Aug 2018)

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The majority of 10-12 year olds have at least one social media account.



Source: Research Now Survey Oct 2016: Do you have a social media account?
(n=250)

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But, tweens are cautious...

They are aware and wary of stranger-danger and bullying based on:

- Conversations at home
- Talks at school
- Cautionary tales
- Witnessing issues with older siblings

They're not looking for trouble but they know trouble can find them.

As such, they are apt to be careful with:

- Keeping their accounts private
- Who they follow/subscribe to/friend
- Who they accept follow/friend requests from
- What they post

"I don't like making accounts on stuff except for Snapchat...I feel safer with just the one thing."
— 10yo girl

"[I'm careful about what I post because] there's a lot of weird people out there and I don't want them seeing what I do."
— 11yo boy

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... and parents are leery.

- Parents acknowledge the upside of social media:
 - It can be fun, silly, creative
 - It's a great way to stay in touch with friends when you move, change schools
- But they are concerned with their children:
 - Being exposed to mature content, which contributes to the larger concern of innocence lost
 - Accidentally sharing more information that they should, and resulting predator danger
 - Engaging with, or becoming the victims of, bullying
 - Having yet another reason to try to increase screen time
 - Being unable to communicate properly in the real world
 - Tying their self worth too closely to "likes"

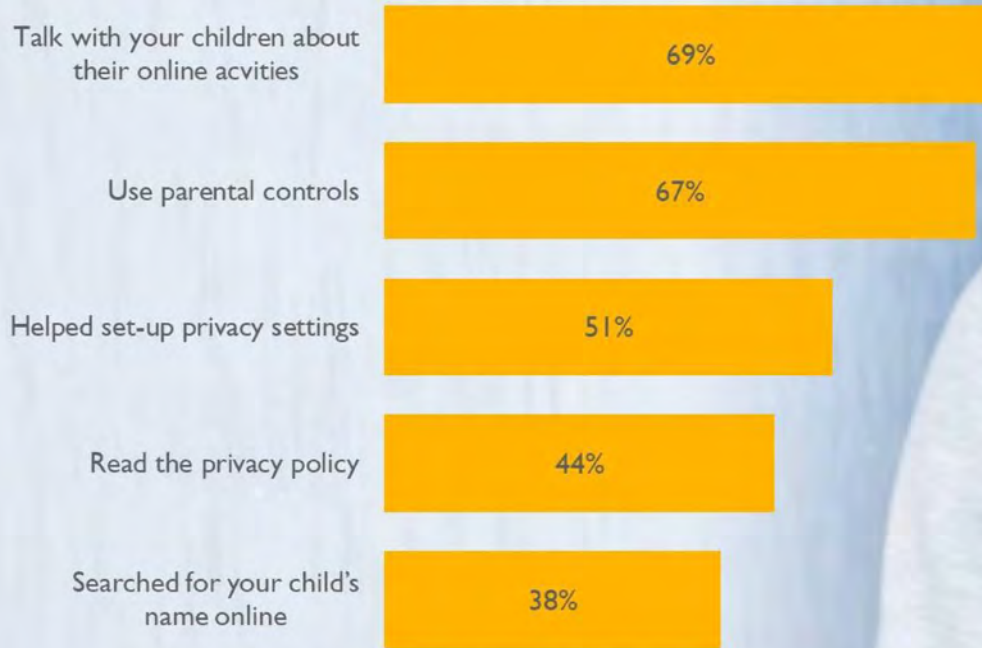


"I fear that anything that my kids say [on social media] could be taken out of context towards somebody else.
– Dad of 10yo girl

"[With her social media use I worry about] the potential for bullying, cyber bullying and anything like it."
– Mom of 12yo girl

Online safety is a top concern to both parents and kids.

Parents implore kids to only connect with people whom they actually know and to stick to kid-appropriate content. Because kids want to stay out of trouble and prove themselves worthy of their parents' trust, they mostly stick to the rules.



"We have the parental controls set up so she can't wander into anything inappropriate for her age."
— Mom of 12yo girl

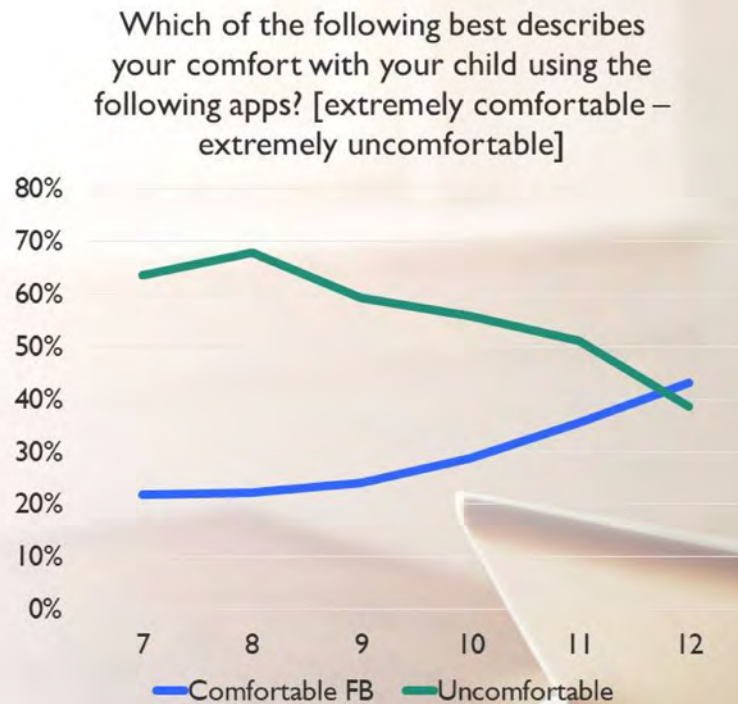
Source: Dubit Trends. DQ10. What actions do you take to protect your children online?
(Base: US Wave 6 275 (11-12))

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Parents are still gatekeepers for tweens' social media access.

The majority of parents' are uncomfortable with their kids' use of social media on any app until age 11. Facebook is the app that parents feel most comfortable with their kids using, but only just barely.

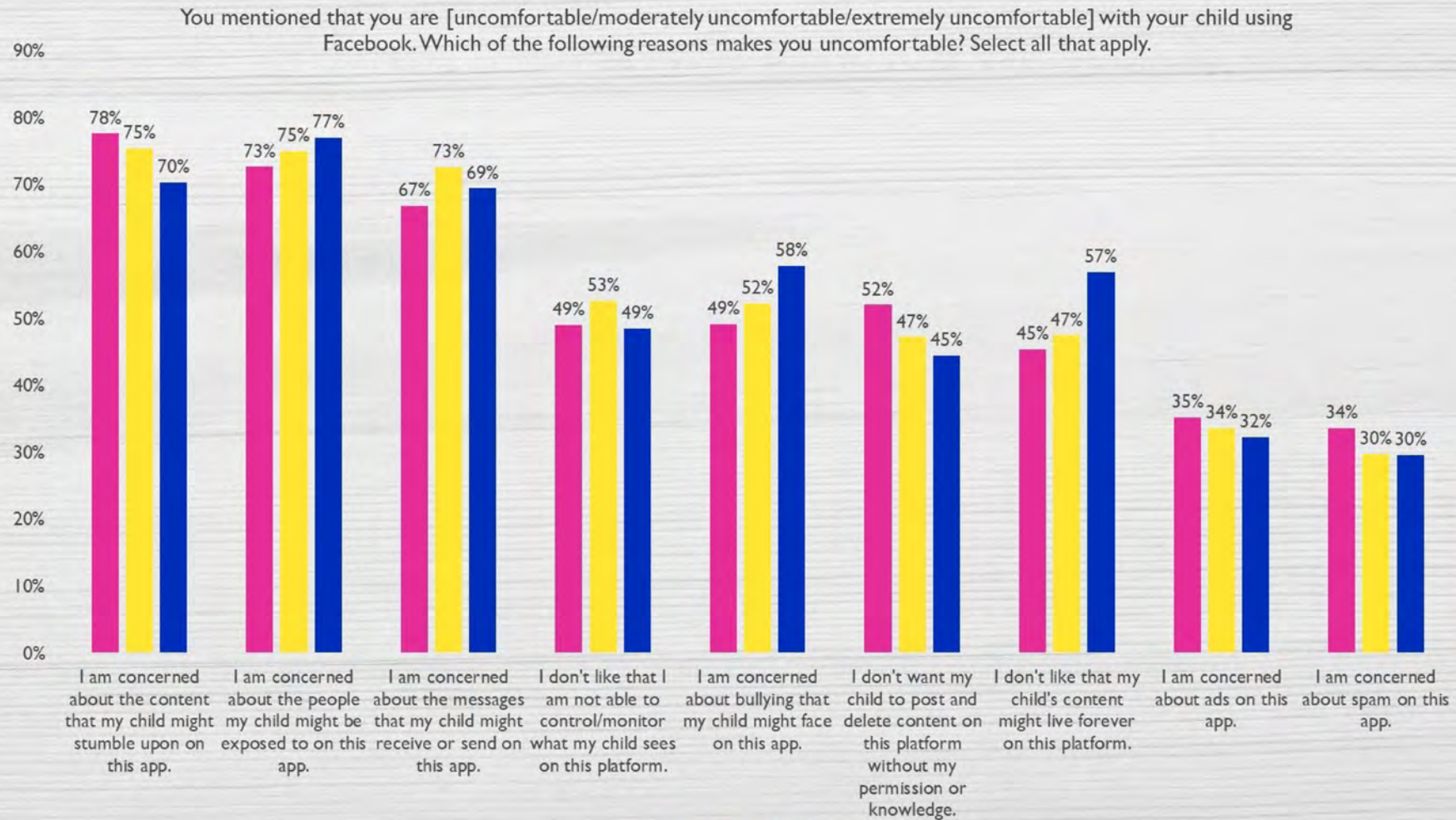


Source: Internal survey March 2017
(n=486)

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Parents are concerned about their kids being exposed to inappropriate content or people. They get more worried about their kids being mean as they use social media more.



Source: Internal survey March 2017
(n=486)

■ 10 ■ 11 ■ 12

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Parents keep a close watch over their tweens' social media.

- Parents and kids are often connected on social media
 - Some tweens use their parents' accounts, while others are logged into their accounts on their parents' devices.
 - Most are connected to their parents or other adult relatives, who see everything they do.
- Parents and kids negotiate for ONE social media account at a time
 - If kids prove themselves to be responsible, more are allowed to follow (often pretty quickly).
 - That is kids' #1 incentive to abide by parental rules.
- Kids are mostly passive or share with a small group of friends only
 - They generally look and like more than they post.



"I follow the iSunny page because it's kid friendly most of the time. If there is inappropriate stuff I just skip over it."
– 11yo boy

Tweens' online social circles are very small.

Tweens connect with family members and real-world friends – and maybe friends of friends – but no one else.

Some follow celebrities or athletes through platforms that allow them to do so, but it's voyeuristic and one-way.

Accounts are almost always private. Tweens are very sensitive of being too public for safety reasons.



"On my [social media] accounts, if someone wants to follow me and I don't know who it is I'm just going to delete [the request] so they can't see what I'm posting and they're not following me."

– 11yo boy

"[On social media] I follow just my friends, the pretty close ones."

– 12yo girl

"I don't really add anyone I don't know."

– 10yo girl

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Because the real driver of tween social media engagement is entertainment, not connectivity.

The relatively small world that's created on social media makes sense given that tweens:

Still see their friends and family on a regular basis in person

Don't always have a ton to say, especially boys

Often find themselves "bored" – and turn to digital content in general to make things fun

"I never really post stuff to my story, but me and my friends have a streak, so I just send stuff to them."
– 12yo girl

"[I get on social media] when I'm bored."
– 10yo boy

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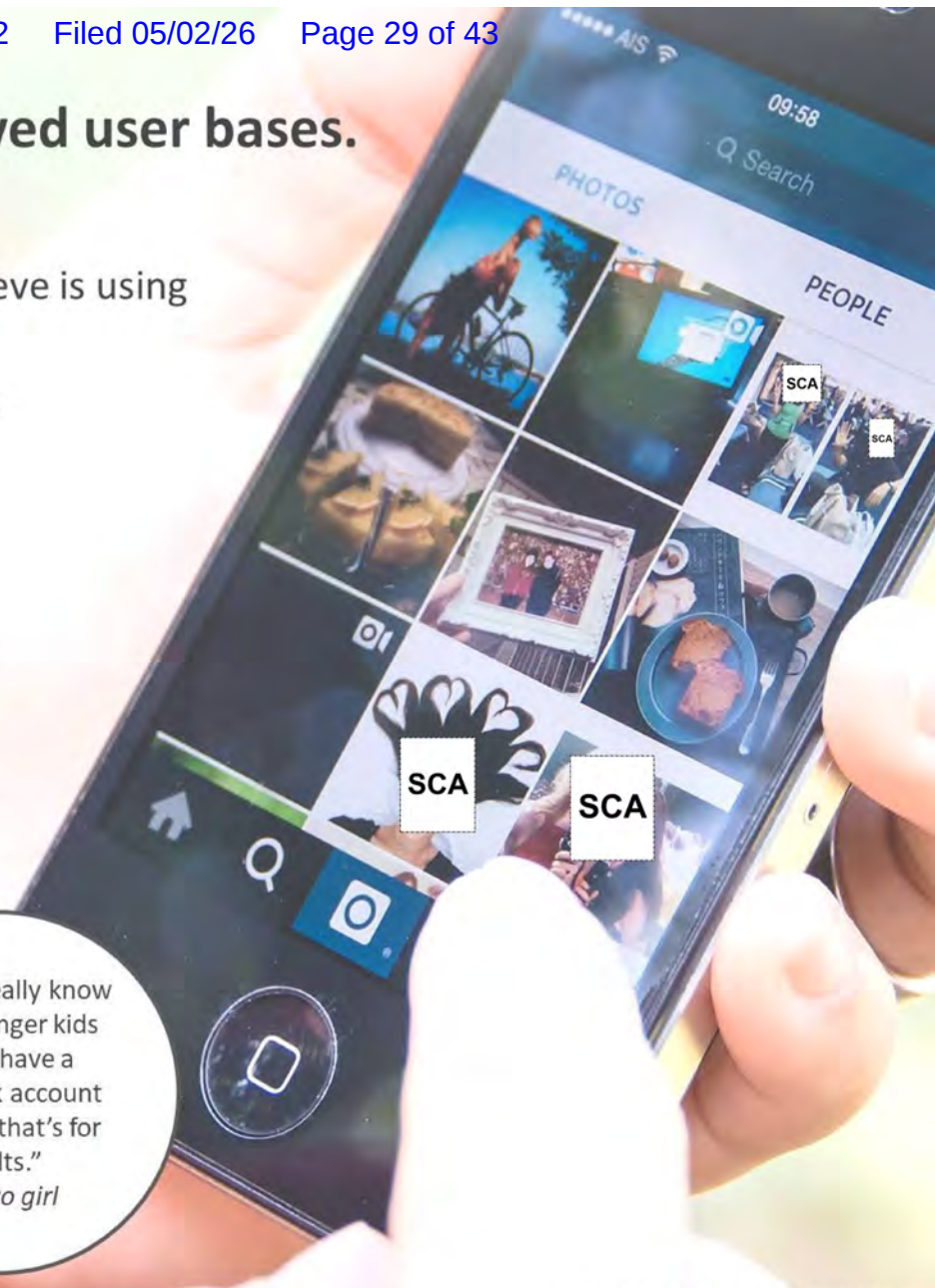
Tweens and Social Media Apps

Platform perceptions are based on perceived user bases.

- More than anything else, tweens focus on who they believe is using any given social network.
 - It's the first thing they mention when comparing, contrasting and describing.
- But they are somewhat capable of understanding the features/functions/user interfaces that result in specific audiences gravitating towards certain platforms.
- Accordingly, tweens do not feel all social media platforms are for them – or that they necessarily function differently than one another.

"Musical.ly is for kids because it's silly and kids are silly."
– 11yo girl

"I don't really know why younger kids would have a Facebook account because that's for adults."
– 10yo girl





Facebook is for old people.

- Tweens have parents that use the interface – by default, raising awareness but limiting its appeal.
- It's not fun – it's functional.

"Facebook is
for old
people – old
as in 40."
– 11yo boy

"A lot of adults have
a Facebook account.
I think that on
Facebook people
post some stuff that
should only be for
adults."
– 10yo girl



Perceived user base:

- Parents
- Aunts and uncles
- Cousins age 20+



Frequency:

- Rarely, if ever
- Once a week at most
- Only after other apps have been exhausted



Favorite features:

- None mentioned

Platform experiences that result in this user base:

- Delayed communication (Messenger awareness is low, feels separate from the core experience)
- Busy, confusing UX
- Used to post (but not play with) videos and pics
- Lots of advertising (and tweens can't buy online)

What it's good for:

- Keeping tabs on what your family is up to

"I have
Facebook
Messenger but
I don't have
Facebook."
– 12yo girl

What's Missing: People my age. I have it, but I don't create anything here.



Instagram is for teens.

"Most of my friends are on Instagram."
– 12yo boy

"More people my age are into Instagram."
– 11yo girl

- Tweens discover Instagram from parents, older siblings or friends with older siblings.
- It's more fun than Facebook but functions in many of the same ways



Perceived user base:

- Middle schoolers
- High schoolers
- Some young adults
- Celebrities



Frequency:

- A few times a week
- Only after Snapchat has been checked



Favorite features:

- Looking at others' content

Platform experiences that result in this user base:

- Delayed communication (Direct awareness is low)
- Video/photo editing
- Posting to stories
- Sharing live videos
- Simple UX
- Liking others' content

What it's good for:

- It's primarily a consumption-based app to see what others are up to
- Sharing:
 - Special moments (e.g.: vacation, sports)
 - Celebrations (e.g.: when you're dressed up)
 - Cool things (e.g.: food, shoes)

What's Missing: I don't post much here, but it's cool to look at stuff.



Snapchat is for tweens.

- Tweens have a deep and wide understanding of this platform.
- It's fun, funny, silly and creative – seemingly made just for them.

"Some of the filters are silly so some of the adults are like, 'What is this? This is like too silly and stuff.'"

– 11yo girl



Perceived user base:

- High schoolers
- Middle schoolers



Frequency:

- Multiple times a day
- Almost every day



Favorite features:

- Photo editing
- Streaks

Platform experiences that result in this user base:

- Large library of timely and ever-changing filters
- Streaks
- Bitmojis
- Temporariness of it all
- Directness of communication
- "Ghosting" and being visible on Snap maps

"Streaks are how many days in a row you Snapchatted someone. My longest one is 137."

– 11yo boy

What it's good for:

- Videos and pictures of funny experiences
- In the moment, spontaneous sharing
- Being random
- Sharing the real you
- Making the most of your camera roll
- Showing your commitment to friends (via streaks)

What's Missing: We can't all do things together, and everything goes away again.



YouTube is not seen as social media.

- Tweens know they can comment on videos, but rarely do anything other than “like”.
- Many want to post their own content but aren’t allowed to.

“I use YouTube because YouTube's like a really fun app to go on and just look around or you can look at stuff that you want to do.”
– 11yo boy



Perceived user base:

- Literally everyone



Frequency:

- Multiple times a day
- Every day of the week



Favorite features:

- Watching favorite YouTubers

Platform experiences that result in this user base:

- Seemingly endless, constantly growing library
- Every format, genre, topic included
- The only place for short-form video
- Incredibly smart suggested videos algorithm

“[On YouTube I find new videos by] going to the home page bucket list channels.”
– 10yo girl

What it’s good for:

- Learning about something of interest
- Laughing
- Accessing cross-network content

“On YouTube I’ll either watch like lifehacks or DIYs.”
– 12yo girl

What’s Missing: I don’t connect with my friends here.



Musical.ly is not seen as social media.

- Even though tweens can comment and like videos, the platform is more a creative outlet than a mode of connectivity.
- The skew is heavily female but seems to be made with tweens in mind.

"I got
Musical.ly
when I was
11."
— 12yo girl

"[On
Musical.ly]
you can post
silly videos."
— 11yo girl



Perceived user base:

- High school girls
- Middle school girls



Frequency:

- A few times a week



Favorite features:

- Creating and editing videos

Platform experiences that result in this user base:

- Current music
- Youthful editing options
- Rooted in performing

What it's good for:

- Discovering new music
- Creating videos
- Scrolling through favorite Musers' posts
- Being creative, silly

What's Missing: I don't connect with my friends here.



House Party engagement is limited.

- Many tweens have heard of the platform, but few are using it.
- It simply seems like another video chat that's not much better than FaceTime, Skype and even Google Hangouts.

"Oh yeah, House Party! I've heard of it but I don't know what it does."
— 12yo boy



Perceived user base:

- High schoolers
- Middle schoolers



Frequency:

- Rarely



Favorite features:

- None mentioned

Platform experiences that result in this user base:

- Video chat

What it's good for:

- Video chatting with multiple people

What's Missing: There is only one thing to do here.

In Sum



FACEBOOK is social media for my family



INSTAGRAM is the place to watch stuff and share the best version of my life



SNAPCHAT is iMessage + FaceTime + Instagram with a way to share the real me



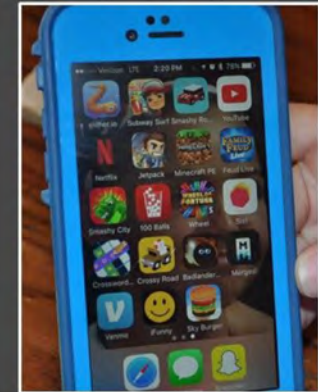
YOUTUBE is the video version of Google



MUSICAL.LY is YouTube + iMovie + Snapchat



HOUSEPARTY is FaceTime for everyone





Tweens and Social Media Needs

None of the existing apps truly fulfill tweens' needs for a social platform.

As is the case with many other categories, tweens are making do with what's been created for kids and/or teens.

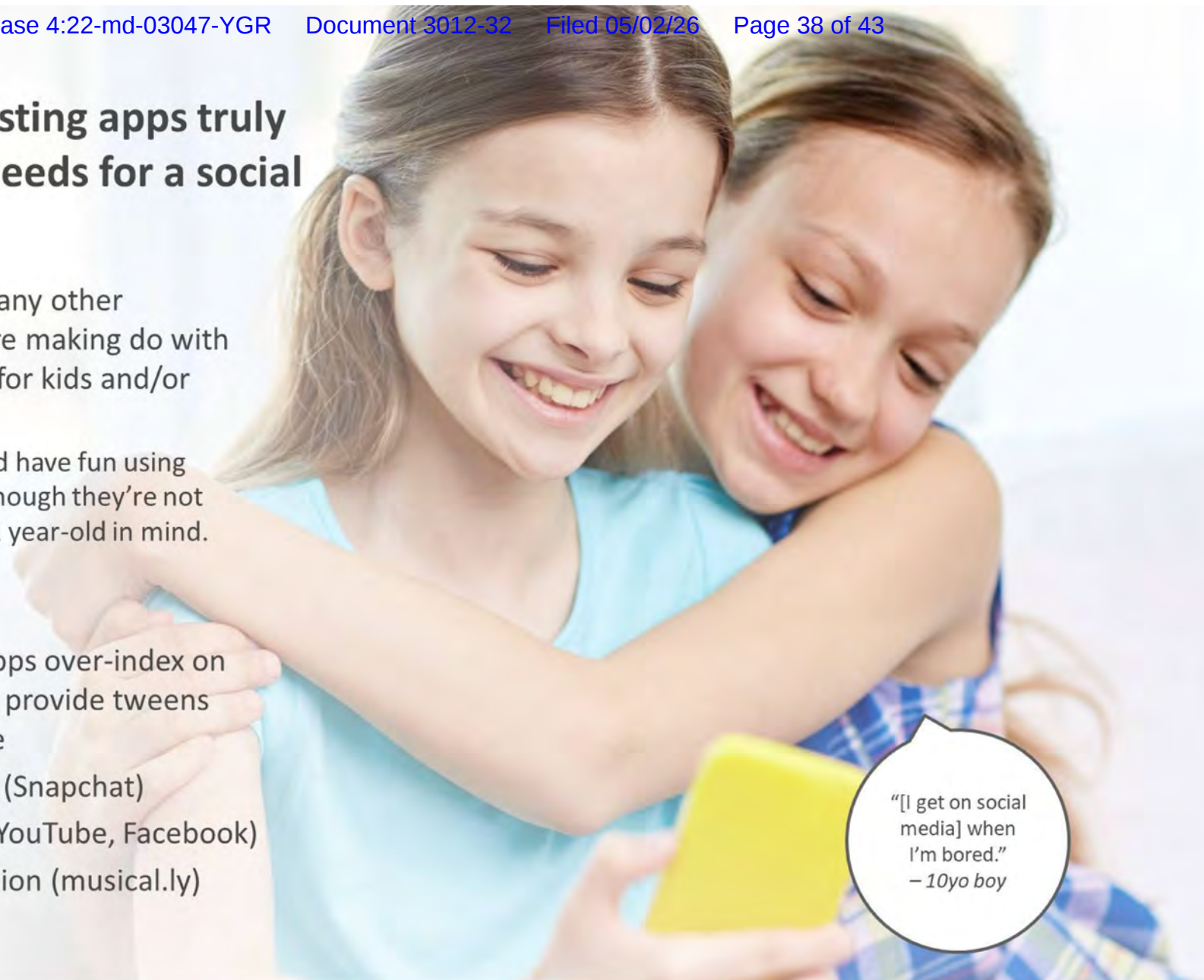
They can connect and have fun using existing apps, even though they're not made with a 10 to 12 year-old in mind.

Currently available apps over-index on one vector, but don't provide tweens the variety they crave

Communication (Snapchat)

Entertainment (YouTube, Facebook)

Creative expression (musical.ly)



"[I get on social media] when I'm bored."
— 10yo boy

And it may not be “social media” in the traditional sense.

The need for communication is limited. But, the ability to connect emotionally with friends is important.

The need for documenting and showing one’s life is limited. But, the desire to blend offline/online lives is high.

The desire to be part of a group is at all-time high. Tweens need to have fun and their desire see what others are up to is never-ending.

Tweens want to be able to go deep on their interests. But, patience for passive-only consumption is limited. Tweens desire to make something themselves and prefer interactive-consumption models.



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Tween Product Needs

Highlight group experiences that provide feelings of belonging

Strengthen connections (not communication) to a small circle of close friends

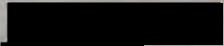
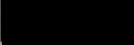
Use entertainment/interests as a starting point for engagement

De-emphasize self-presentation. Instead, highlight fitting in.



What's Next

Questions?


@fb.com

The research findings in this report are based on a series of qualitative and quantitative studies over the past 1.5 years. Due to the sensitivity of the subject, not all findings and materials are included in this report. If you want to dig in further for your work on tweens, please reach out to me directly!

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Metadata

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