

Produced in Native



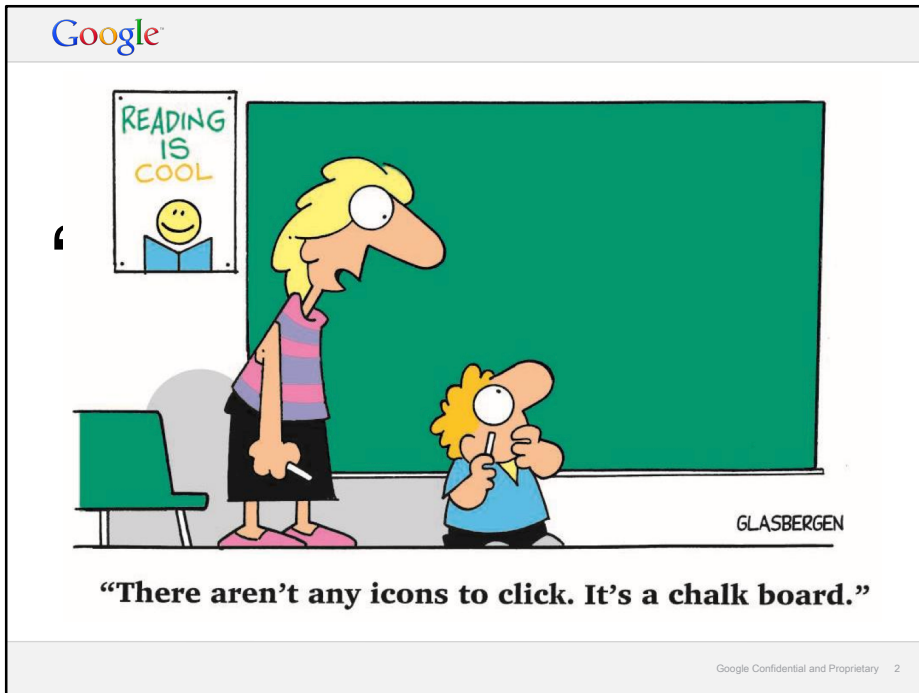
Kids are Digital Natives

Generation Z



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Generation Z is one name used for the cohort of people born after the preceding Millennial Generation. There is no agreement on the exact dates of the generation with some sources starting it at the mid or late 1990s [1] or from the mid 2000s [2] to the present day. This is the generation who are currently being born.



Digital Natives grow up using connected devices



Digital natives in digital homes



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Message:

Kids also live in a world with MORE devices than ever
And many of those devices are connected to the web



To kids, there is no “going online,” because there is no offline

71%

would rather have a
tech gadget than
a toy



Source: The Intelligence Group, “YDNA Insights,” 2013

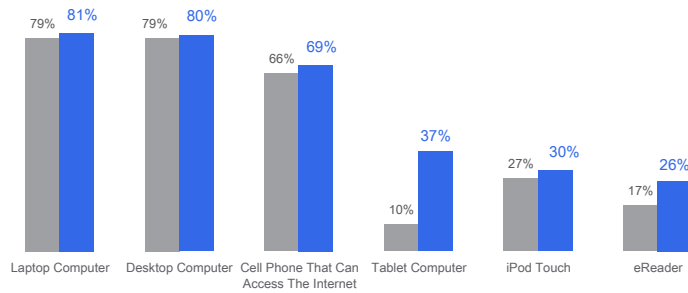
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Kids grow up in a connected environment

In 2013, 45% of kids are online, and 95% of moms are online

Devices Owned by Households
With Kids Aged 6-12

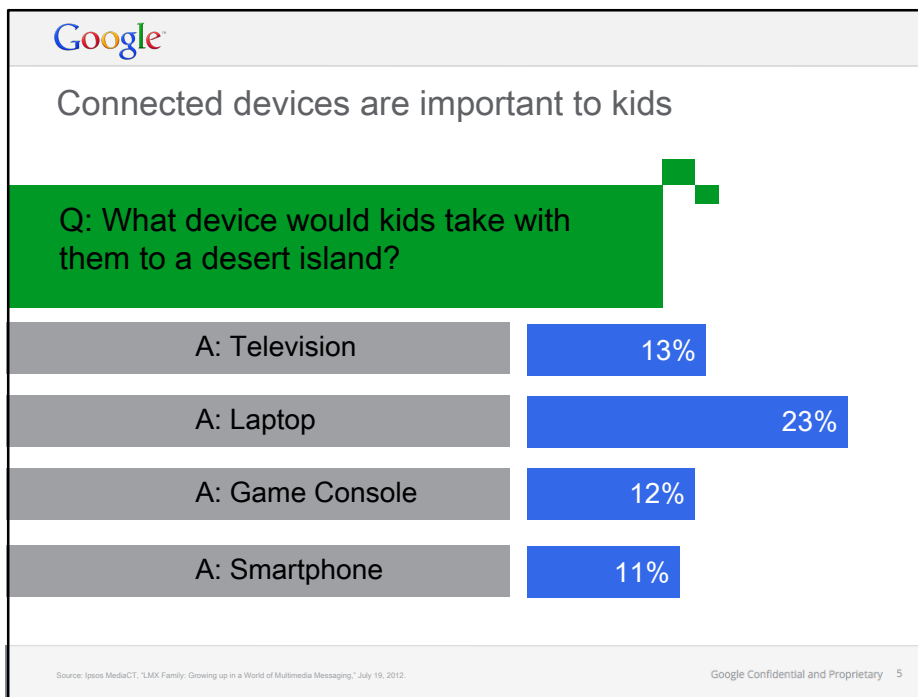


Source: Ipsos MediaCT, "LMOX Family: Growing up in a World of Multimedia Messaging," July 19, 2012.

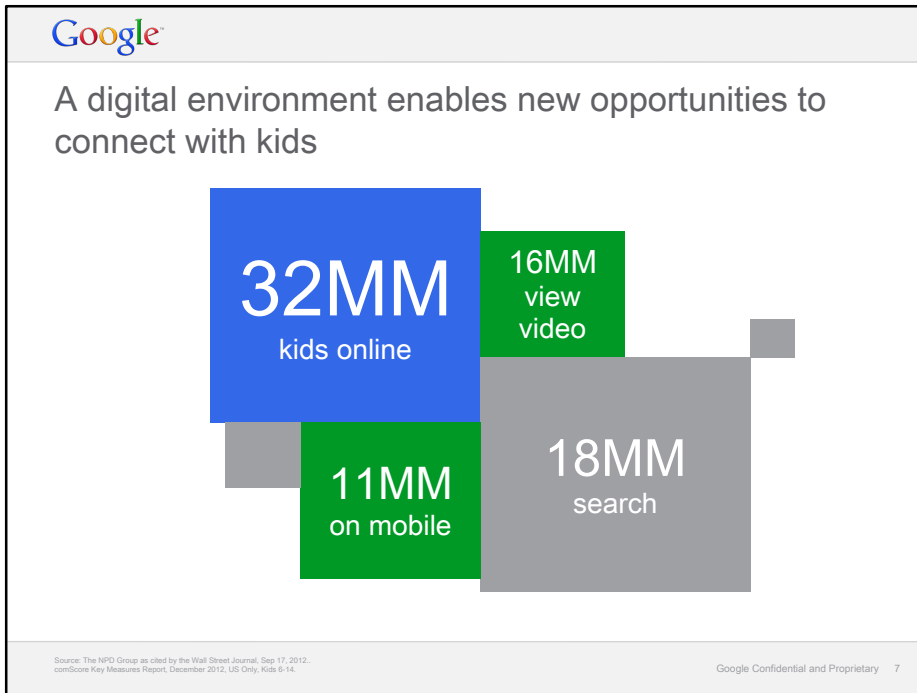
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Message:

Kids also live in a world with MORE devices than ever
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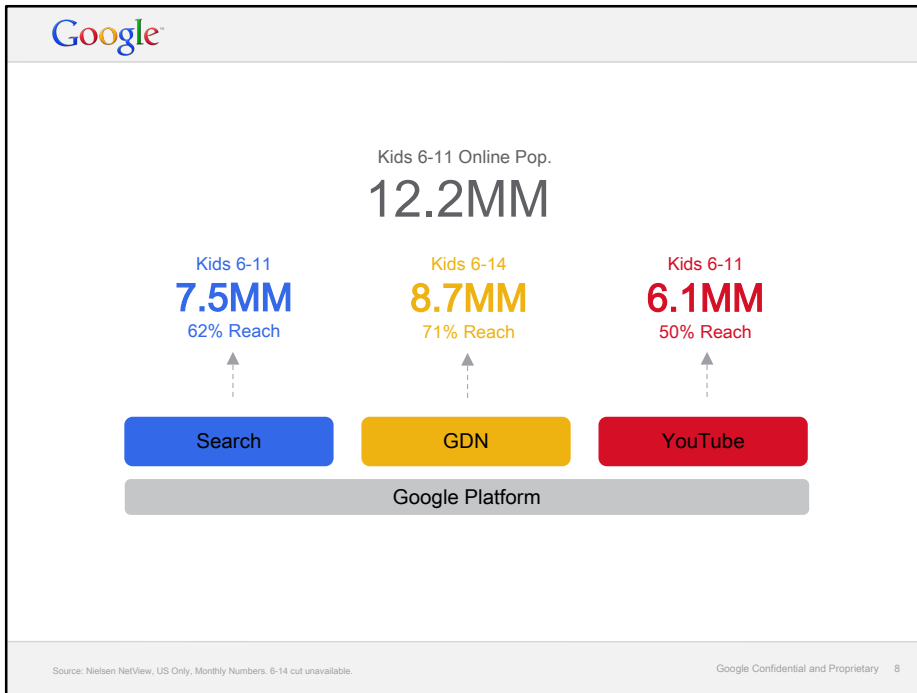
Message:
Web-connected devices are important to kids



Message:

In summary, kids today grow up in a vastly different environment, one that is full of web-connected devices

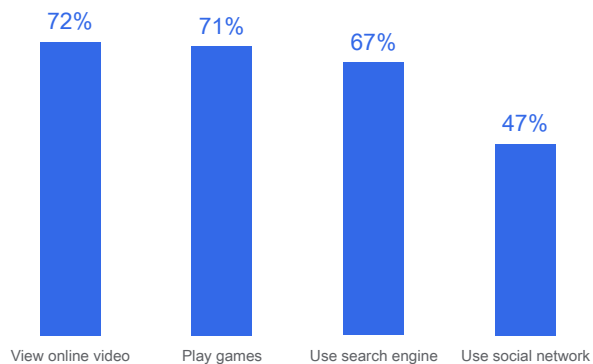
This new landscape provides additional opportunities to connect with kids...from search and video to mobile



Facebook reaches 48% of kids 6-11 5.0MM

Kids engage in various online activities

Online Activities Among Kids 6-14

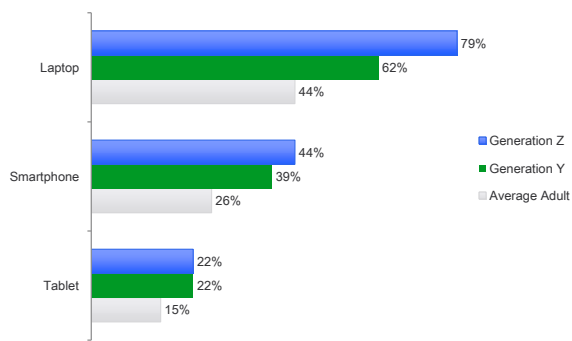


Source: Google Consumer Surveys, 2013. N = 500 for reach question. US only.
 Q: How often does your child play online games?
 Q: How often does your child view online videos?
 Q: How often does your child use a search engine (Yahoo!, Bing, Google)?
 Q: How often does your child use a social network (Facebook, Google+)?

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Gen Z is more likely to watch video on laptops, smartphones & tablets

Percentage of those who watch video monthly on laptops, smartphones & tablets

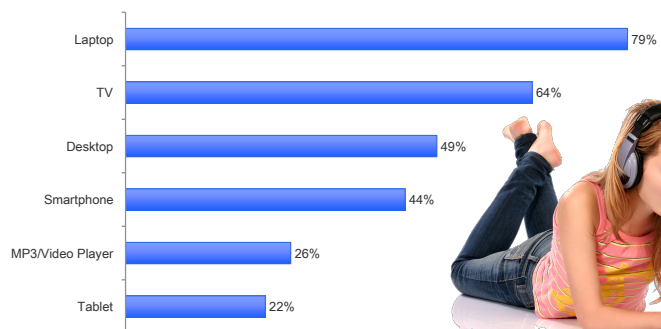


Source: Forrester M&E Consumer Technographics, 2013

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Gen Z is more likely to watch video on their laptop than on a TV

The percentage of Generation Z that watch any type of video MONTHLY on each of the following devices:



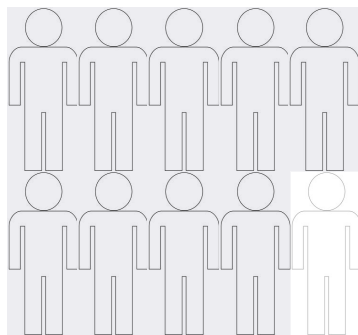
Source: Forrester M&E Consumer Technographics, 2013

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YouTube is a main source of entertainment for Gen Z

9 out of 10
Gen Z Consumers
watch YouTube each month



Gen Z spends an
average of

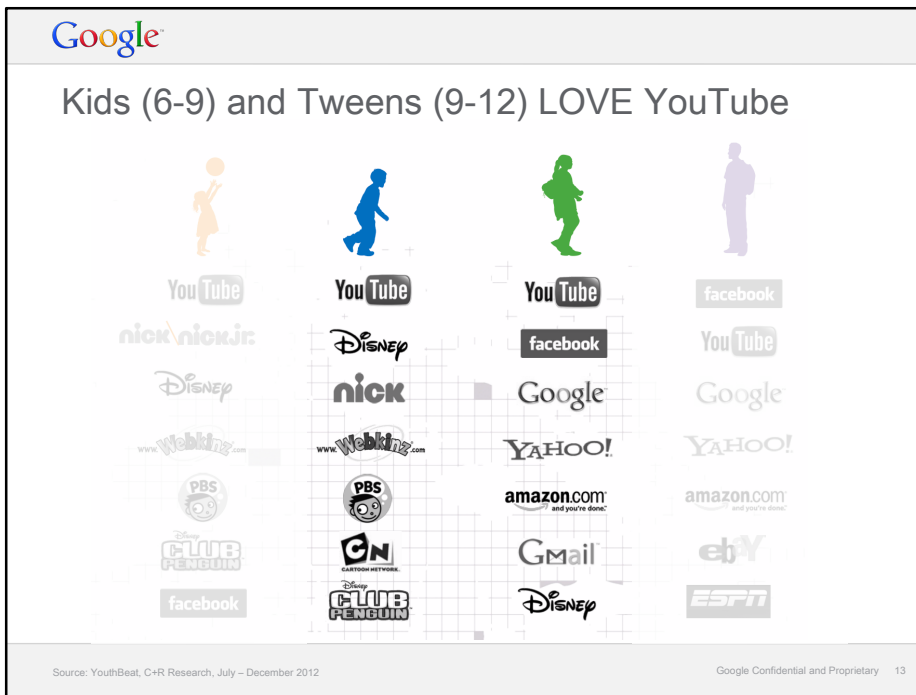
5.4 hrs/week

Watching video on



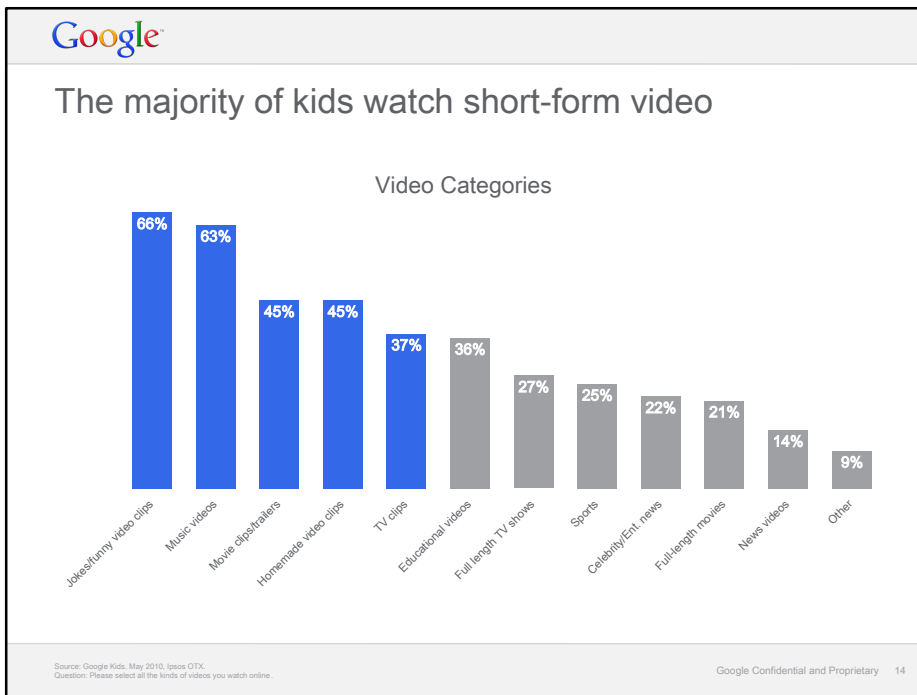
Source: Forrester M&E Consumer Technographics, 2013

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Preschool: ages 2-5
 Kids: 1st-4th Graders
 Tweens: 5th-8th Graders
 Teens: 9th-12th Graders

This shows the top sites that each group selected as their favorite site (and this was asked as an open-ended question). We included this data in this section on TV to show that even the top websites for kids are heavily influenced by the TV viewing experience. We see YouTube as an important venue for brands to post their TV ads. We agree with some of the other speakers that it isn't enough to post on YouTube and expect your ad to go viral, but at the same time, our data and conversations with youth tell us that tweens, in particular, expect your ad to be sharable and viewable, over and over again, on YouTube.



Message:

Kids enjoy a variety of content

Funny clips / music videos / trailers = MASSIVE content categories on YouTube
(versus full-length / long-form content on sites such as Hulu)

Appendix



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Generation Z is one name used for the cohort of people born after the preceding Millennial Generation. There is no agreement on the exact dates of the generation with some sources starting it at the mid or late 1990s [1] or from the mid 2000s [2] to the present day. This is the generation who are currently being born.



Standard reach stats

KIDS (32MM kids 6-14 total online audience size)

GDN reaches 71% of kids 6-14

YouTube reaches 50% of kids 6-11

Google search reaches 63% of kids 6-11

PARENTS WITH CHILD 6-11 (42.4MM total audience size)

77% used Google search in past 30 days (112 index)

21% used YouTube (113 index)

46% own a smartphone (126 index)

33% use mobile search (33% of total parent population, NOT just phone owners)

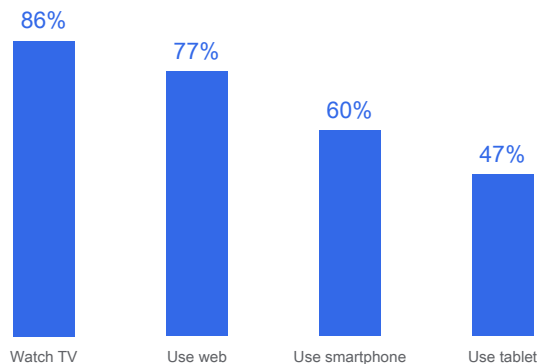
12% watched a video on their mobile phone

Source: Nielsen @Plan, Q4/2012, US, 18+
Disney Enthusiast* = someone who watches Disney XD OR Disney XD visits a resort OR made a purchase at a Disney Store in past 30 days.

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Kids' attention is increasingly fragmented

Media Usage Among Kids 6-14



Source: Google Consumer Surveys, 2013. N = 200 for reach question. US only.

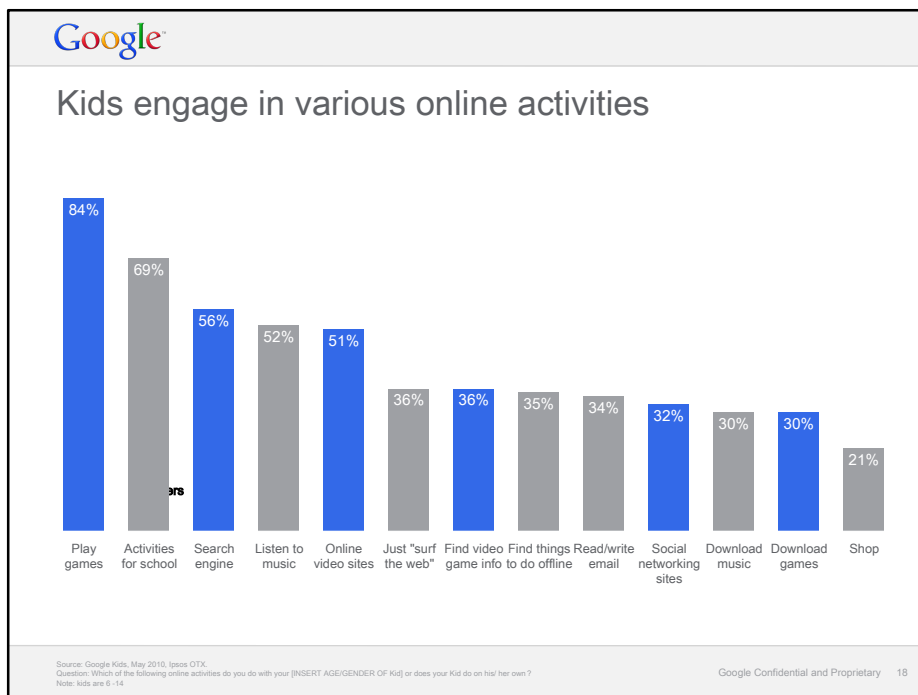
Q: How often does your child use the web?

Q: How often does your child watch TV?

Q: How often does your child use a smartphone (their own or yours)?

Q: How often does your child use a tablet (their own or yours)?

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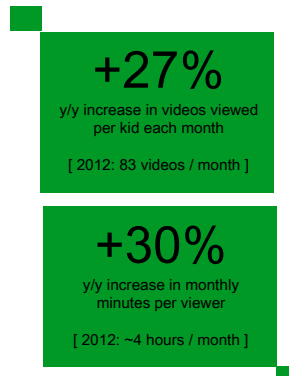


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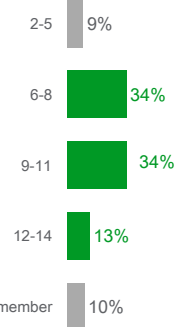
Kids love playing games, but searching, viewing online video, and surfing the web are also important



16,000,000 kids watch online video on Hulu, YouTube, etc.



Age First Started Using Video Sites



Source: Google Kids, May 2010. Ipsos OTX. 51% of kids 6-14 visited online video sites in 2010. 32MM x .5 = 16MM.
Question: Thinking of a regular week, how often would you say you go to online video sites (like Yahoo! Video, Hulu, etc.)?
Question: About how old were you when you first started to go to online video sites (like Yahoo! Video, Hulu.com, etc.)?
comScore Key Measures Report, December 2012, US Only, Kids 6-14.
comScore Video Metrics Key Measures, US Only, Kids 6-14, December 2012 and December 2011.

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Message:

Kids view video frequently

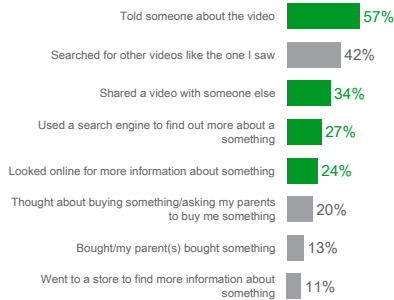
68% of kids begin viewing video between 6 and 11



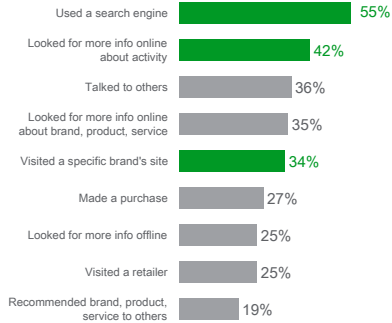
Video viewing drives action among kids and parents

Kids tell someone about a video; parents search for more info

Actions Kids Take After Viewing Video



Actions Parents Take After Viewing Video with Kid



Source: Google Kids, May 2010, Ipsos OTX
Question: Which, if any, of the following have you done because of an online video you saw?
Question: Which of the following actions, if any, have you taken as a result of visiting an online video site (like YouTube, Yahoo! Video etc.) with your (INSERT AGE/ADOLESCENT OF KID)?

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Message:

Viewing video motivates kids to talk and share videos with their friends (WOM)
It also leads to kids SEARCHING for more info