A Generation Unplugged
Research Report
September 12, 2008
Methodology

- The study was conducted online among a nationally representative sample of 2,089 teenagers across the U.S. who have cell phones (ages 13-19). More than 100 questions were asked on mobile phone usage, attitudes, behaviors, and teens’ desires and aspirations for the future including mobile communications and entertainment. The study was conducted in July 2008 among teenagers who are part of the Harris Interactive Online Panel.
I’d Die Without My Phone!

- Phone to make or receive calls: 46%
- Send or receive text messaging/SMS: 39%
- Use the camera to take pictures: 19%
- Send or receive picture messaging/MMS: 17%

Q810 - How do you feel about the following features and applications that may or may not be on your cell phone? (n=2189)
Importance of Having Latest Cell Phone

Q1410 - How important is it to have the latest and greatest cell phone for your purposes (e.g., it does what you need it to do)? (n=2189)
Cell Phone Impact on Teen Life

- Having a cell phone has improved the quality of my life:
  - Somewhat Agree: 38%
  - Strongly Agree: 19%
  - Total Agree: 57%

- Communicating with my friends has really become a new form of entertainment - a richer experience:
  - Somewhat Agree: 36%
  - Strongly Agree: 16%
  - Total Agree: 52%

- Having a cell phone is the key to my social life:
  - Somewhat Agree: 29%
  - Strongly Agree: 16%
  - Total Agree: 45%

- My cell phone has influenced my education positively:
  - Somewhat Agree: 14%
  - Strongly Agree: 4%
  - Total Agree: 18%

Q1035 - Cell phones impact people’s lives in different ways. Please tell us how much you agree or disagree with the following statements about cell phones? (n=2189)
Attitudes about the future

Strongly/Somewhat Agree

I will have a mobile phone for as long as I live. 67%

I wish mobile phones could be ordered with just the features I choose. 62%

I don't care about the technology behind my phone as long as it does what I want. 46%

I am concerned about privacy and security issues when using my mobile. 41%

In the future when on my own, a mobile phone is the only type of phone I will have. 39%

Mobile phone service should be free and paid for by mobile advertisers just like broadcast TV. 38%

Q1370 - How do you feel about the following statements? (n=1071)
Teens Knowledge About Cell Phones Compared to Their Favorite Things

Much/Somewhat more/About the same

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Cell Phones</th>
<th>Other Favorite Things</th>
</tr>
</thead>
<tbody>
<tr>
<td>13-15</td>
<td>62%</td>
<td>41%</td>
</tr>
<tr>
<td>16-17</td>
<td>49%</td>
<td></td>
</tr>
<tr>
<td>18-19</td>
<td>41%</td>
<td></td>
</tr>
</tbody>
</table>

Q1300 - Please think about how much you know about your favorite things (e.g., hobby, sports team). In thinking about your knowledge level of those things in your life you are most interested in, how would you rate your knowledge of cell phones, carriers and service plans? (n=2189)
Why Teens Carry Cell Phones…

The 2 BIGGEST Motivators

89%

- It's the way I stay in touch
  - Describes completely: 50%
  - Describes very well: 23%
  - Describes pretty well: 16%

78%

- It makes me feel safe while on the go
  - Describes completely: 27%
  - Describes very well: 28%
  - Describes pretty well: 23%

Q800 - People carry their phone around with them for a variety of reasons. Using the scale below, please tell us why you carry a cell phone by stating how much each of the following statements describes how you feel. (n=2189)
The Power of Safety!

Have you updated your Marketing plan recently?

Many teens use their phone to help them get out of a jam when they need a ride.

- **79%**
  - Call someone to pick you up when you missed a ride

- **51%**
  - Get information you desperately needed

- **35%**
  - Be a good Samaritan and help someone else in trouble

- **24%**
  - Get help when you had car problems/a flat tire

- **18%**
  - Get help in an emergency (i.e., call 911)

Q1055 - Have you ever used your cell phone to ...? (n=1914)
Why Teens Carry Cell Phones…

Top Motivators #3 thru 5

Q800 - People carry their phone around with them for a variety of reasons. Using the scale below, please tell us why you carry a cell phone by stating how much each of the following statements describes how you feel. (n=2189)
Maybe Diamonds Aren’t Forever …

What determines a teen’s social status?

- **#1** Clothing
- **#2** Cell Phones
- **#3** Jewelry/Watch
- **#4** Shoes

Average Rank
1.55 – Clothing
2.68 – Cell Phone
2.87 – Watch/Jewelry
2.90 – Shoes

Q1462 - Which of the following do you think tells you the most about a person’s social status or popularity? (n=2189)
9 out of 10 Teens Text
Half Say They Can Do It **Blindfolded**

**Using a full keyboard (QWERTY)**
- Smartphone: 72%
- Cell Phone: 30%

**Using a 0-9 keypad with T9 predictive text**
- Smartphone: 16%
- Cell Phone: 30%

**Using a 0-9 keypad without T9 predictive text**
- Smartphone: 8%
- Cell Phone: 21%

**Ability to Text Blindfolded:**
- 42% Yes
- 26% Not Sure
- 32% No

Q1020 - When texting, which of the following methods do you prefer the most? (n=2189)
Q1025 - Could you effectively text blindfolded or without looking at your keypad? (n=1815)
Time Spent Talking vs. Texting

Q1005 - How much of the time on your cell phone is spent doing each of the following? (n=2189)
Can’t Get Enough of these Features

- **Phone to make or receive calls**: 79% Die without it/Love it, 88% Use Frequently
- **Send or receive text messaging/SMS**: 67% Die without it/Love it, 74% Use Frequently
- **Use the camera to take pictures**: 61% Die without it/Love it, 64% Use Frequently
- **Calendar function**: 33% Die without it/Love it, 41% Use Frequently

Q810 - How do you feel about the following features and applications that may or may not be on your cell phone? (n=2189)
Q815 – Which of the following features do you use very frequently? Select all that apply. (n=2189)
The Joy of Texting…Why?

Texting is a **NEW** form of communication

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I can multitask</td>
<td>46%</td>
</tr>
<tr>
<td>It's fast</td>
<td>42%</td>
</tr>
<tr>
<td>I don't have to talk in person</td>
<td>36%</td>
</tr>
<tr>
<td>It's private/stealthy</td>
<td>33%</td>
</tr>
<tr>
<td>It's fun</td>
<td>29%</td>
</tr>
<tr>
<td>It's easier</td>
<td>28%</td>
</tr>
<tr>
<td>I can send something and wait for a response</td>
<td>23%</td>
</tr>
<tr>
<td>It saves voice minutes</td>
<td>20%</td>
</tr>
<tr>
<td>It's less expensive</td>
<td>10%</td>
</tr>
</tbody>
</table>

If texting no longer offered: 47% Would end their social life/or make it a little worse

---

Q1015 - What do you like most about texting on your cell phone? Please select your top 3 choices. (n=1845)
The Joy of Texting ....Why? (continued)

Males vs. Females

- I can multitask: Males 38%, Females 53%
- It's fast: Males 43%, Females 41%
- I don't have to talk to them in person: Males 35%, Females 37%
- It's private/stealthy: Males 31%, Females 35%
- It's fun: Males 25%, Females 32%
- It's easier: Males 27%, Females 29%
- I can send something and wait for a response: Males 19%, Females 28%
- It saves voice minutes for me/my family: Males 19%, Females 21%
- It's less expensive: Males 11%, Females 10%

If texting no longer offered:
- Females: 54% would end their social life or make it a little worse
- Males: 40% would end their social life or make it a little worse

Q1010 - If you woke up tomorrow and text messaging was no longer offered on anyone's cell phone how would your social life be affected? (n=2189)
Q1015 - What do you like most about texting on your cell phone? Please select your top 3 choices. Male (n=802), Female (n=1043)
### Teens High Expectations... Can our industry meet the challenges?

<table>
<thead>
<tr>
<th>Mobile Technology</th>
<th>Important</th>
<th>Very Important</th>
<th>Absolutely Essential</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Security that guarantees only you have access to data on your phone</td>
<td>27%</td>
<td>24%</td>
<td>29%</td>
<td>80%</td>
</tr>
<tr>
<td>Improve our health and safety by having medical records, hospitals and rescue</td>
<td>33%</td>
<td>20%</td>
<td>13%</td>
<td>66%</td>
</tr>
<tr>
<td>works all aware of critical information</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The freedom to get an education from any location on earth</td>
<td>34%</td>
<td>18%</td>
<td>14%</td>
<td>66%</td>
</tr>
<tr>
<td>Bring the world closer by better understanding global issues</td>
<td>32%</td>
<td>18%</td>
<td>13%</td>
<td>63%</td>
</tr>
<tr>
<td>Keeping up with my social responsibility (i.e., volunteering)</td>
<td>36%</td>
<td>14%</td>
<td>9%</td>
<td>59%</td>
</tr>
<tr>
<td>A single global network to bring the world closer with easier communication on the</td>
<td>34%</td>
<td>14%</td>
<td>10%</td>
<td>58%</td>
</tr>
<tr>
<td>network</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Provide a virtual world of communication with those you care about (think Star</td>
<td>30%</td>
<td>16%</td>
<td>9%</td>
<td>55%</td>
</tr>
<tr>
<td>Wars 4 Virtual meetings with holographic presences</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Helping keep me aware of environmental issues</td>
<td>31%</td>
<td>16%</td>
<td>8%</td>
<td>55%</td>
</tr>
<tr>
<td>Change the structure of how people work (work at home or wherever, almost no</td>
<td>33%</td>
<td>14%</td>
<td>8%</td>
<td>55%</td>
</tr>
<tr>
<td>offices and commuting)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Eliminate money and credit cards - the mobile way of purchasing will transform</td>
<td>24%</td>
<td>10%</td>
<td>7%</td>
<td>41%</td>
</tr>
<tr>
<td>economy</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Redefine entertainment (make movie theatres extinct, create virtual worlds and</td>
<td>23%</td>
<td>9%</td>
<td>6%</td>
<td>38%</td>
</tr>
<tr>
<td>vacations)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Q1225 - How important are each of the following mobile technologies in providing for your future? n=2189)
What Improves Teen Loyalty to Their Cell Phones

- Don't charge for features I don't like or don’t use: 65%
- Make me feel that my needs are important: 55%
- I could trial some cell phones to see if I like it: 43%
- There could be special limited edition phones that I could get if I stay with your brand over time: 41%
- Allow me to customize the phone to fit my needs: 39%

13-15 year olds – 52%
16-17 year olds – 44%
18-19 year olds – 33%

Q1380 - Please rate how each of the following will affect your loyalty to your current cell phone brand. (n=1071)
Q915 - If cost were not a factor, which of the following would influence you to play more games on your phone? (n=1639)
How Do You Jumpstart Gaming?

2 Ideas we tested …

Almost half of teens who play video games now would love to be able to transfer games to their handheld.

47%

Ability to pause and transfer game to cell phone

27%

20%

Ability to move phone for game interaction

31%

21%

10%

Q920 - What do you think about the ability to move your phone to interact with a game you are playing on your cell phone? (n=1521)

Q925 - How would you like it if you could pause the game, transfer it over to your cell phone and pick up right where you left off in the game on your cell phone? (n=1393)
Almost 1 in 3 teens is browsing the web on their phone.

**Do you browse the web on your cell phone?**

- **Yes**: 28%
- **No**: 72%

### Types of Information Browsed on Cell Phones

- **Email**: 57%
- **Social networking sites**: 48%
- **Weather**: 46%
- **Driving directions**: 29%
- **Sports**: 28%
- **US/Local news**: 27%
- **Things for class**: 24%
- **Reviews**: 22%
- **International news**: 12%
- **Blogs**: 12%

**Q835 - What types of information do you browse for on your cell phone?** (n=2189)
1 in 5 Teens Do Social Networking Tasks on Phone

Of the 19% of teens who visit social networking sites ...

- Message friends/family: 62%
- Update your current status: 47%
- Check people's pages out who you know: 44%
- Check other people's status: 41%
- Listen to music: 32%
- Post and view pictures/videos: 30%
- Watch videos: 21%
- Play games: 18%
- Check people's pages out who you don't know: 14%
- Meet new people, but have never met them in person: 13%
- Meet new people, and have later met them in person: 7%

Q1045 - How often do you visit social networking sites on your cell phone? (n=2189)
Q1050 - What do you participate in when you visit these social networking sites on your cell phone? (n=364)
Mobile Advertising

General Mobile Ads Interest

- Not at all interested: 52%
- Somewhat interested: 21%
- Interested: 15%
- Very interested: 6%
- Extremely interested: 6%

Of those with some interest in mobile ads...

- Points towards a new phone: 38%
- Points towards music: 20%
- Points towards text/picture/video messages: 12%
- Points towards games/applications: 11%
- Points towards talk minutes: 9%

Teens have a higher acceptance rate than adults (64% - Not at all interested)

Q1130 - How interested would you be to receive advertisements on your cell phone if some incentives were offered by the cell phone provider in return? (n=2189)
Q1135 - I would be more interested in receiving ads on my cell phone in exchange for reward points that can be used towards ...? (n=1021)
Great News For Mobile Advertising
6 in 10 Teens Willing Provide Personal Information

Trust to Keep Profile Info. Safe:
- 28% Cell Phone Provider
- 11% 3rd party company that deals w/ personal info security
- 2% Cell Phone Manufacturer

Willingness to Provide Profile Information

- Yes 59%
- No 41%

Yes, I would be willing to provide profile information.
- 5%

Yes, I would be willing - but only in return for the right incentive.
- 18%

Yes, I would be willing - but only if I could turn off the information at any time.
- 20%

Yes, I would be willing - but only if I chose to whom my information is provided.
- 16%

Teens have a lower willingness to provide profile information than adults (9% - Not at all interested)

Q1150 - Which of the following best describe your willingness to provide profile information about yourself to your wireless provider so that ads could be custom tailored to your needs? (n=2189)
Q1155 - Who would you be willing to trust to keep your profile information safe? (n=2189)
The Dream Device – Phone Qualities

Some Things Can Be Fixed Immediately

Top 2 Box – I want that now/Like it a lot

- It would be shock and water proof. 81%
- It would have an endless power supply, no need to charge it. 80%
- It would be completely scratch proof. 78%
- It would have a privacy screen so only your eyes could see what is on your screen. 58%
- When you need to type, keys automatically pop up through the touchscreen so you have a full keyboard. 50%
- A mobile device that has artificial intelligence. I'd ask it questions and it would answer me like a person would. 36%

Q1220 - We would like to know what your dream mobile device of the future will look like and what features it will have? (n=2189)
What Teens Want on Their Next Phone

<table>
<thead>
<tr>
<th>Feature</th>
<th>I'd use it all/most of the time</th>
<th>I'd use it most of the time</th>
<th>I'd use it sometimes</th>
<th>I'd use it sometimes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emergency transmitter</td>
<td>34% 16% 24% 74%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Translate any language instantly</td>
<td>28% 16% 23% 67%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View 3D holographic displays</td>
<td>24% 15% 23% 62%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Control things in my house</td>
<td>24% 17% 21% 62%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Text order to restaurant</td>
<td>30% 14% 15% 53%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>To record/TiVO TV shows</td>
<td>24% 14% 15% 53%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Use my phone to pay for things</td>
<td>25% 11% 13% 69%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ability to vote</td>
<td>22% 10% 12% 69%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Q1205 - Using the scale below, please indicate your desire to perform the following on your cell phone in the future. (n=2189)
The Dream Device – What It Looks Like

It would be made of a flexible material that folds into any shape and unfolds to any desired size. 39%

The mobile device should just be software and take the shape of whatever we wish. 31%

It would be paper thin. 27%

It should be part of our eyes (i.e., a pair of sunglasses or an eyepiece). We need to see full screen entertainment, talk, and see the Internet all at once. 26%

It would be part of what I wear (e.g., watch, wristband, jewelry). 23%

It could be a small earpiece that reads our brainwaves. You think about calling or texting someone and it does it. 23%

We should be able to order the mobile device and piece it together like LEGO's. 20%

There would be no personal mobiles just public devices everywhere. When we pick one up our fingerprints configure the phone to our needs. 18%

Q1220 - We would like to know what your dream mobile device of the future will look like and what features it will have? (n=2189)
Q1210 - Would you rather have a single device that combines the multiple things you carry with you on a daily basis (e.g., books, money and etc.) or would you rather carry around these things separately? (n=2189)
# Building the Best Teen Bundle

## The Ideal Teen Bundle

**Items Selected as Part of Bundle (up to 5 items)**

<table>
<thead>
<tr>
<th>Item</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>iPod/MP3 player</td>
<td>71%</td>
</tr>
<tr>
<td>GPS</td>
<td>47%</td>
</tr>
<tr>
<td>Desktop/Laptop computer</td>
<td>41%</td>
</tr>
<tr>
<td>Portable Video Player</td>
<td>39%</td>
</tr>
<tr>
<td>Access your desktop/notebook computer files anywhere</td>
<td>36%</td>
</tr>
<tr>
<td>Universal remote for things in my home</td>
<td>33%</td>
</tr>
<tr>
<td>Graphing/scientific calculator</td>
<td>28%</td>
</tr>
<tr>
<td>Digital Books/School textbooks</td>
<td>27%</td>
</tr>
<tr>
<td>Digital Wallet (e.g., cash and credit cards)</td>
<td>26%</td>
</tr>
<tr>
<td>Digital Keys</td>
<td>21%</td>
</tr>
<tr>
<td>Carry your mirror/makeup</td>
<td>10%</td>
</tr>
<tr>
<td>Medical supplies/devices (e.g. insulin/blood tester, heart rate monitor)</td>
<td>6%</td>
</tr>
<tr>
<td>Medical records</td>
<td>6%</td>
</tr>
</tbody>
</table>

Q1215 - What things outside of the basic cell phone features (i.e., camera, calendar, calculator, etc.) would you like bundled into your dream mobile device? Chose up to 5 items from the list below that would be combined to make up your dream mobile device. (n=2189)
For More Information

For additional information regarding the full survey results, please contact:

Carly Lejnieks
Harris Interactive at (585) 214-7415
CLejnieks@HarrisInteractive.com.