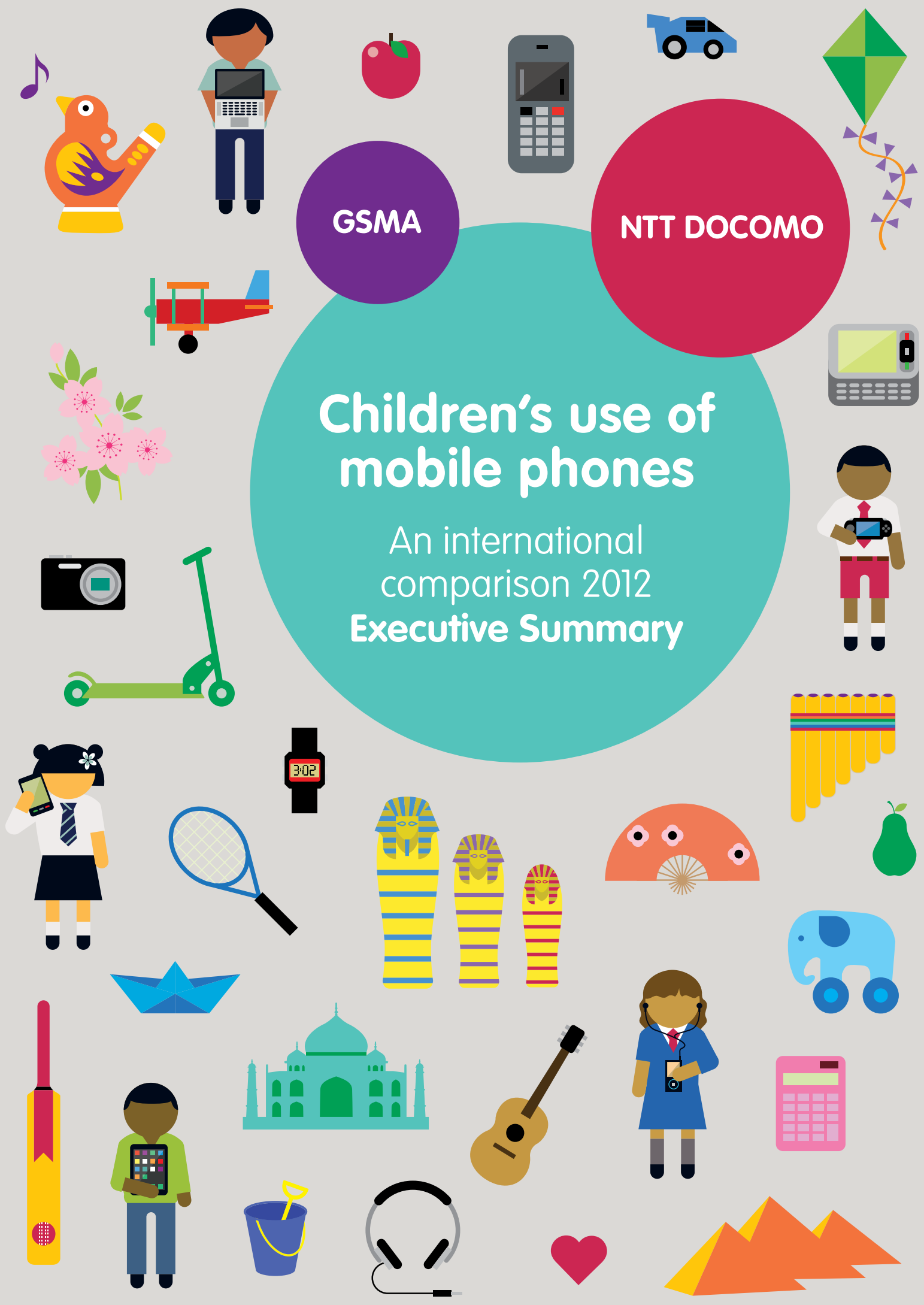


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Children's use of mobile phones

An international comparison 2012
Executive Summary



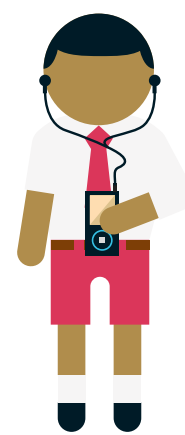
Children in a mobile world

Children around the globe are increasingly passionate users of mobile technology. Demonstrating a receptivity and enthusiasm that far exceeds those of their parents and teachers, they are embracing the opportunities provided by mobile phones in ways that could not have been predicted a decade ago.

Children's use of mobile phones – An international comparison 2012 provides a detailed picture of children's mobile phone usage across five different countries – Chile, Egypt, India and Indonesia. Now in its fourth year, the 2012 study surveyed 4,500 children and their parents or guardians. It builds on work previously conducted in India, Japan and Egypt, and features Indonesia and Chile for the first time.

The 2012 research has been funded by mobile operators in each country with a contribution from the GSMA and the continued support of the Mobile Society Research Institute. The report data was obtained through a series of surveys conducted in each country during July and August 2012. Unless otherwise specified, all data contained in the report is based on these surveys.

The reports are available online
gsma.com/myouth



Research focus

To enable year-on-year comparisons, standard questions were posed to the children and their parents including:

- Age of first mobile ownership
- Reasons for getting a mobile
- Feelings about their mobile phone
- Parents' concerns over their child's use of mobile phones

Additionally, topics for the 2012 survey included:

Social networking and privacy: How many children use social networking services (SNS) on mobile phones; how many contacts do they have; are children and parents aware of what information they are making public via their mobile phones?

Internet access via mobile and content: Are children accessing the internet via mobile; how many are doing it; how long do they spend using it, and what content are they looking for?

Mobile app use: Are apps being accessed by children and how does that compare with their parents' use; what types of apps are being used, and which are the most popular?

The impact on confidence and relationships: Do mobile phones affect children's confidence; do they feel more secure with a mobile phone; how does a mobile phone impact on their external relationships, and what tools do they think are best for strengthening relationships?

Key findings: Ownership and usage

Sixty-five per cent of children aged 8 to 18 have access to a mobile handset. Of children who have mobile phones, 81% use a new handset and 20% own smartphones. Smartphone ownership is particularly high in Chile, with 44% of children with a mobile owning one; Japan follows Chile with 27% owning a smartphone.

Across the five countries, 12 is the most common age for a child to first own a mobile phone. However, there are significant variations by country; for example, in India and Japan it is more common for children to first own a phone when they are 15 years old, whereas in Chile, 10 is the most common age.

The calling and texting habits of children differ across countries and by age. Generally, younger children use their mobile phone initially to make calls rather than send text messages. However their use of text messaging overtakes calling as children get older.

The most popular pre-installed mobile phone function used by children is a camera (more than 75%), with the highest use in India (99%) and the lowest in Egypt (75%). Music players are the second most popular function, with approximately 60% of all children who have them on their phones using them.

There is evidence to suggest that tablet use has increased, but it is still relatively low compared to mobile phone use. Egypt and Chile have the highest tablet use at 18%, while the others have a penetration rate of 7% or less.

Key findings: Accessing the internet via mobile

A large proportion of children (54%) who use mobile phones use them to access the internet. This percentage rises considerably to 87% when looking exclusively at smartphone users.

The frequency of internet access is also very high. Over 70% of all children who access the internet using their handset go online at least once a day.

Of all children who have a mobile phone, 11% listed their mobile phone as their primary device for accessing the internet, and this was particularly high in Indonesia at 25%. The total number increases considerably when looking at smartphone users; over 32% of child smartphone users stated that their mobile phone was their primary source of internet access.

Key findings: Social networking, apps and other services

The use of SNS on mobile phones is fairly moderate; 49% of children who use their phones to access the internet use these services. The age at which SNS are adopted varies from country to country; for example, the majority of 12 year-old mobile internet users in Indonesia and Chile already use mobile SNS, whereas in Japan and India less than 50% of 18 year-old mobile internet users are accessing these services.

A few gender differences were also found, with boys exhibiting slightly higher use of SNS than girls in India, Indonesia and Egypt. The opposite was found in Japan and Chile.

Fifty-seven per cent of children who access the internet via their mobile phone download or use apps; this is highest in Chile at 78% and lowest in Egypt at 44%. Across all countries, entertainment apps are the most popular among children who download apps. They are also the only app category that children use more than their parents in all countries.

Key findings: Safer mobile use

Over 70% of parents have concerns about their children's mobile phone use, with viewing inappropriate sites and overuse sharing the highest percentage at around 82%.

Sixty-five per cent of parents have set family rules about what their children may or may not do on their mobile phone, with Japan having the highest percentage at 77% and India the lowest at 46%; however, there was no common response on punishment for rule-breaking.

In addition to setting rules, 54% of all parents surveyed who have access to parental control solutions use them; with content filters being the most common control applied (57%).

Overall, 45% of children on SNS have public profiles; this is as high as 55% among 13-year-olds, and is highest in Indonesia (65%) followed by Egypt (45%). Although 55% of children have some degree of security on their social networking profiles, 70% have met or started to communicate with 'new friends' online.

Key findings: Mobile's impact on children's lives

Mobile phones are an integral part of children's lives and nearly 80% of child mobile phone users agree that their devices increase their confidence. This was more common among children aged 10 to 13, with over 80% in these age groups agreeing that their confidence is augmented by having a mobile phone.

A high number of children feel insecure without their device, with 63% agreeing that to the statement 'I feel insecure without my mobile phone'. This percentage increases significantly among older children aged between 16 and 18, with 66% to 71% across the age range feeling insecure without their handsets.

The impact that social networking has on children who use these services via their mobile is also apparent, with 90% agreeing that they have reinforced relationships with close friends through such services.

Further information

The mobile generation is here. To learn more about the growing cohort of junior mobile phone users, download the full *Children's use of mobile phones – An international comparison 2012* report at www.gsma.com/myouth.

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Future research

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The GSMA represents the interests of mobile operators worldwide. Spanning more than 220 countries, the GSMA unites nearly 800 of the world's mobile operators, as well as more than 200 companies in the broader mobile ecosystem, including handset makers, software companies, equipment providers, Internet companies, and media and entertainment organisations. The GSMA also produces industry-leading events such as the Mobile World Congress and Mobile Asia Congress. For more information, please visit Mobile World Live, the online portal for the mobile communications industry, at www.mobileworldlive.com or the GSMA corporate website at www.gsmworld.com.

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NTT DOCOMO is Japan's premier provider of leading-edge mobile voice, data and multimedia services. With more than 58 million customers in Japan, the company is one of the world's largest mobile communications operators.

Since 2004, NTT DOCOMO's Mobile Society Research Institute (MSRI) within NTT DOCOMO has been studying the social impact of mobile phone use. The research institute, which operates independently from NTT DOCOMO, conducts research studies into both present and future influences of mobile communications. Its findings are widely disclosed to the public through reports, publications and symposia. For more information, please visit www.moba-ken.jp/english.