



Kids & the Screen: Changing the Channel

The complete picture of video consumption for kids aged 2-12

Kids and the Screen USA: The complete viewing picture

This study aims to track trends in kids viewing behaviors as well as capturing purchase behaviors of parents, so brands are able to best understand how to reach and engage core audiences

How it works...



2000 Kids
Aged 2-12



15 minute survey



To understand how to best reach and engage the younger audience in a fragmented viewing world

Questions aimed at both kids and their moms:

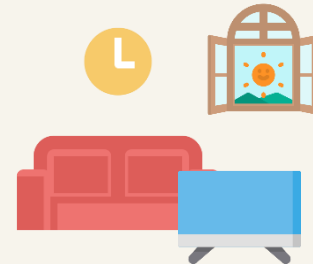
Kids



Moms



KATS USA: Providing unique insights



Discover **where, when and how** best to reach kids audiences, cross-device and by platform, facilitating the planning process.



Understand **content viewing**, top shows, drilling down to specific platforms e.g. YouTube and Netflix.

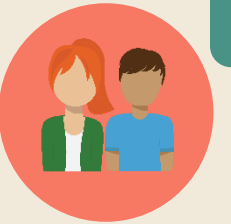


Track trends in viewing behavior **over time** identifying **new platforms** and **behaviors** as they emerge to inform strategies for the future

Digital strategies have to be employed by brands in the US to reach and engage kids most effectively

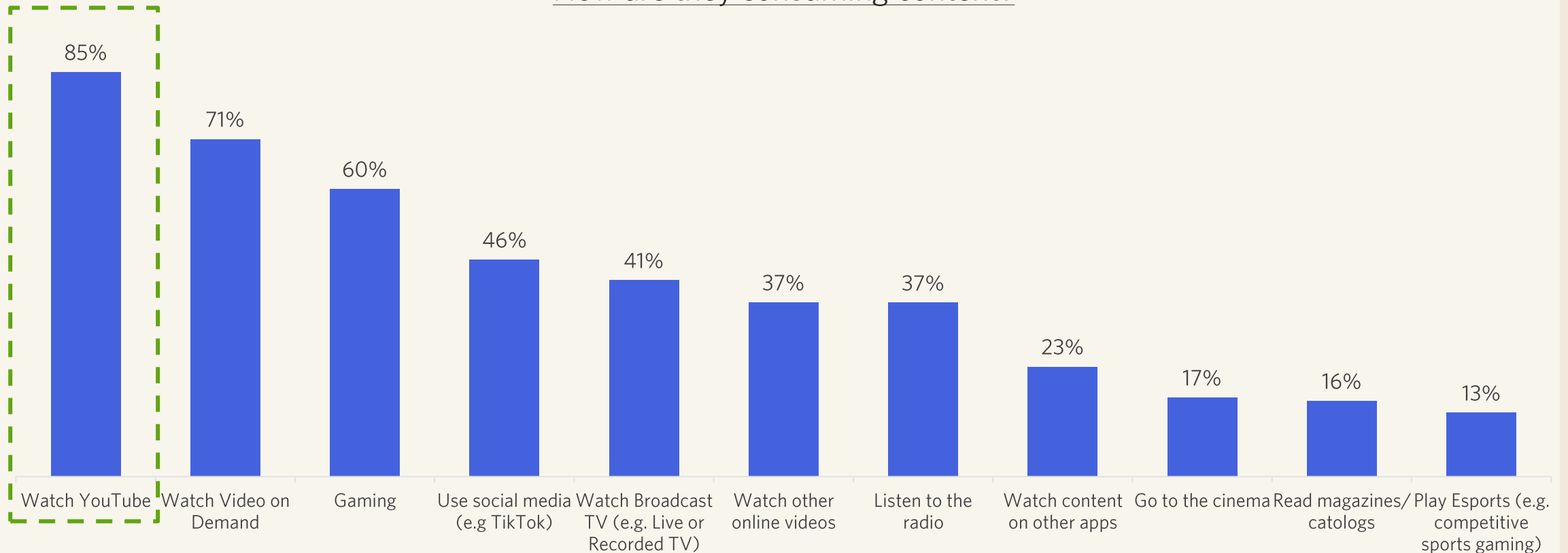


8 in 10 kids in the USA are accessing YouTube

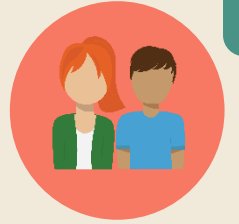


The USA is a digitally led market, with YouTube and Video On Demand dominating the content space

How are they consuming content?



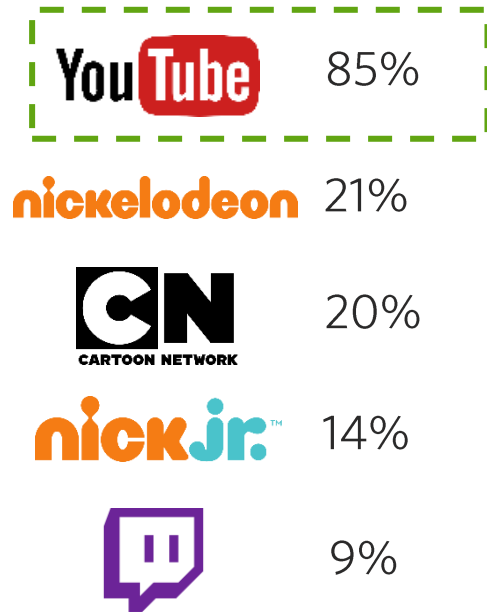
Of all platforms accessed, YouTube is the no.1 single way of accessing video content



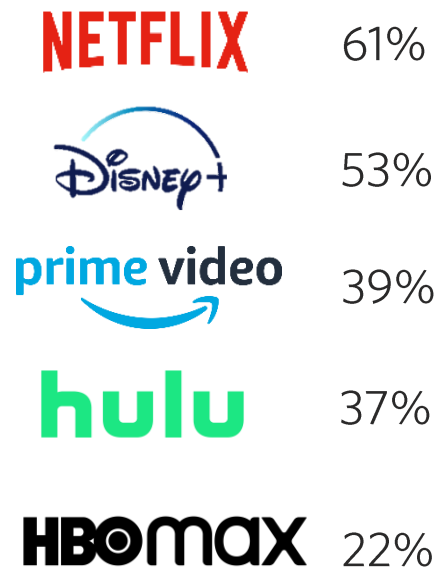
It is clear that kids are accessing a variety of different platforms in order to get the content they want!

Top platforms accessed (% of total population):

Online



Video On Demand

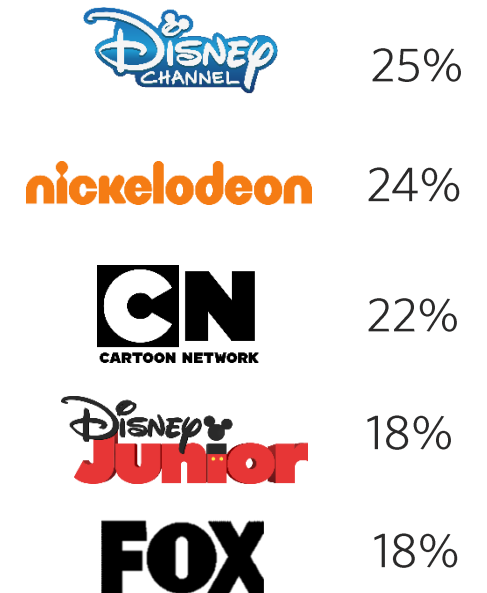


Social Media



Social media usage is largely driven by 10-12 year olds!

Broadcast TV





Brands need to connect through multiple touchpoints, digital being an essential element of this

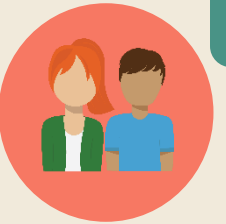


A **THIRD of kids aged 2-12 can only be reached via digital platforms**

35% of kids only access content via YouTube, online sites, social media, gaming and video on demand platforms!

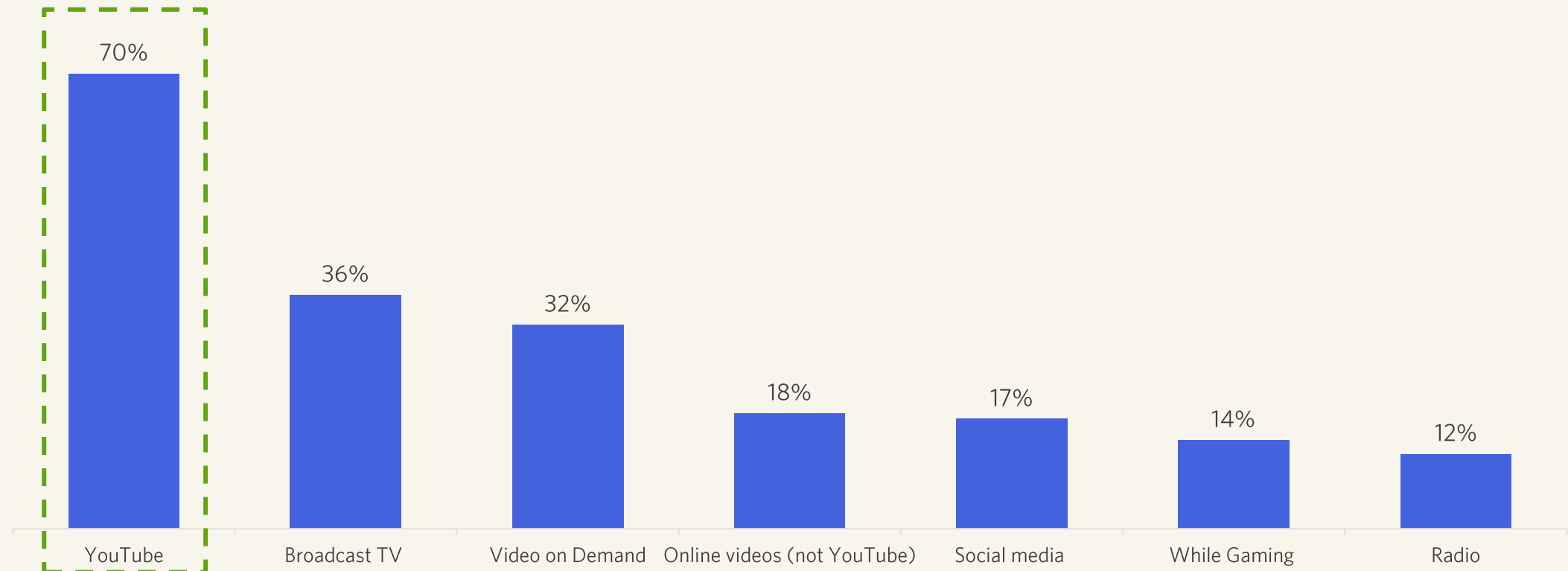
In fact, the commercial reach of YouTube is double that of Broadcast TV!

7



7 in 10 kids have recently seen commercials on YouTube

Where have you recently seen any commercials?

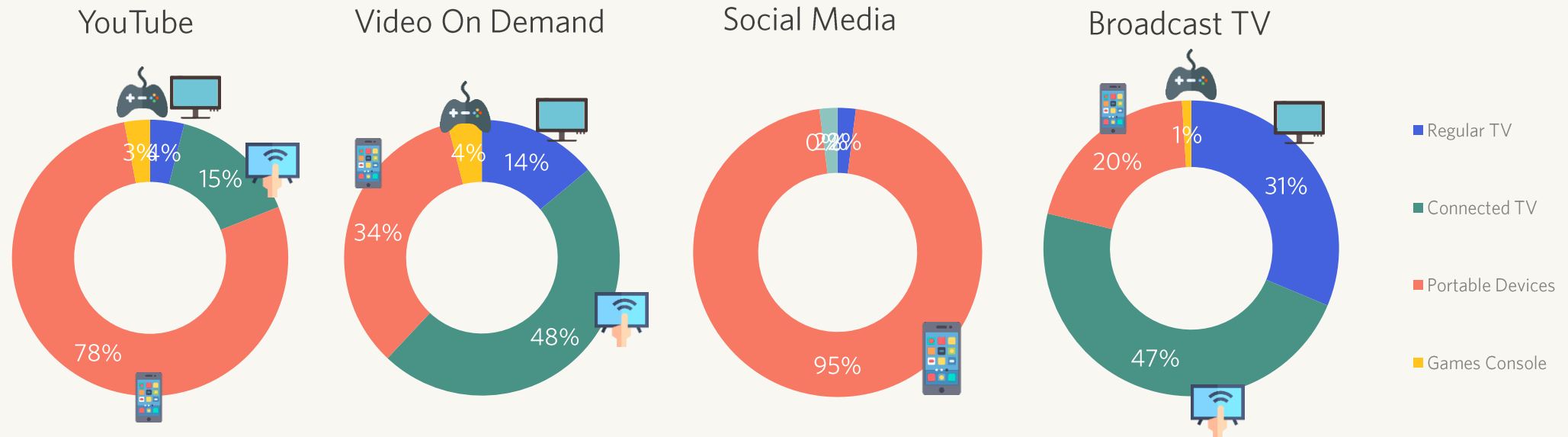


YouTube is able to reach kids, inside AND outside the home



YouTube is predominantly watched on portable devices, meaning it is handy for out of home viewing, but it is also being watched via Connected TV inside the home

Devices used:

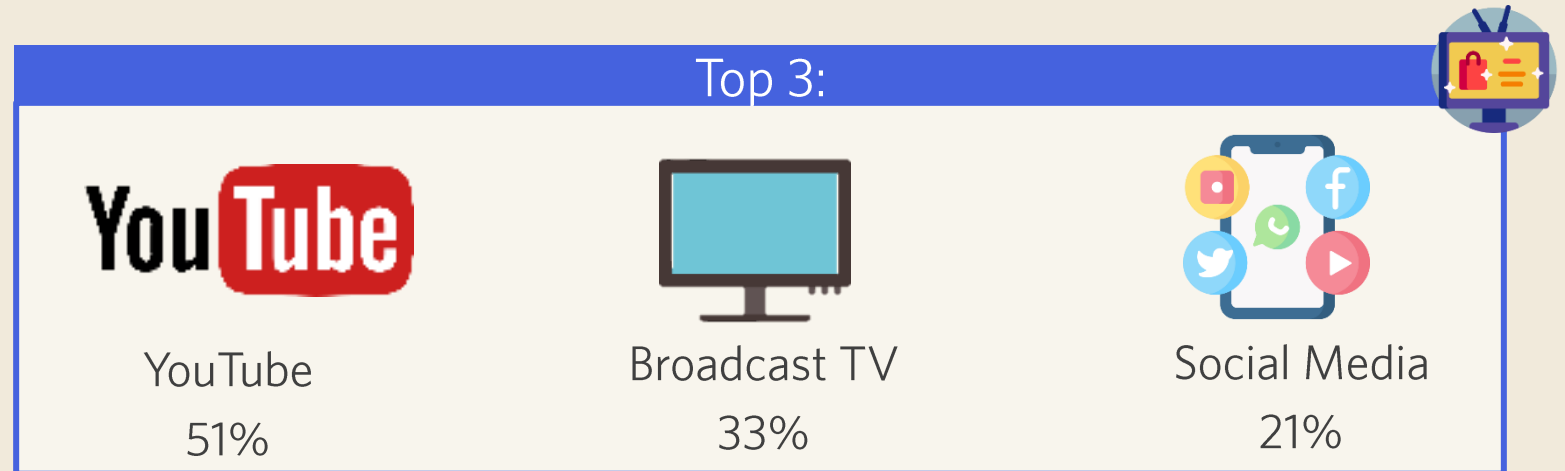


Not only does it have the greatest reach, but YouTube is also considered to have the best commercials

A third of kids had seen a commercial on YouTube for the last thing they asked their parents to buy for them



Where do you see the best commercials?



Thinking about the last thing you asked your parents to buy you, where did you see the commercial for it?



Online commercials are also key to reaching parents!

YouTube offers parents both the most appealing commercials, meaning they are twice as likely to purchase for their child after seeing a commercial on YouTube vs alternative platforms



Where do you see the best commercials?

Top 3:



YouTube
49%



Broadcast TV
29%



Social Media
24%



Thinking about the last thing you bought for your child, where did you see the commercial for it?

Top 3:



YouTube
25%



Broadcast TV
12%



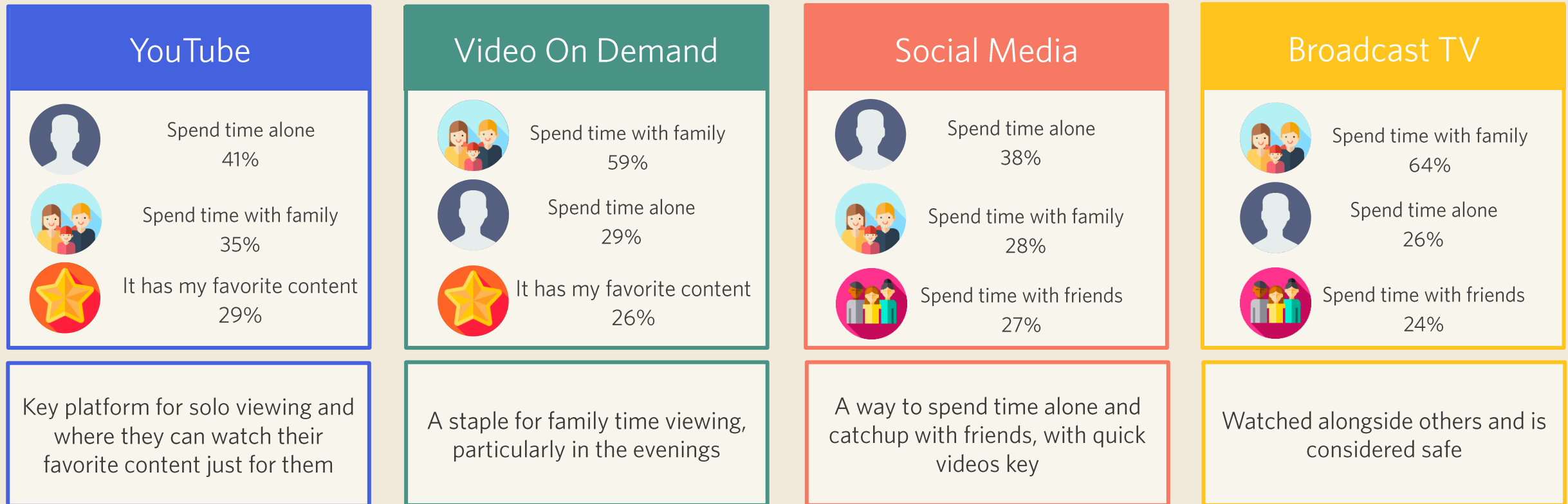
Online Website
10%

Drivers to consume content vary across the key ways to watch



Satisfying solo and family needs across all platforms is a must, with favorite content being watched on digital platforms such as Video On Demand and YouTube

Top motivations to watch for those who watch in these ways:



There are winning content genres across each way to view



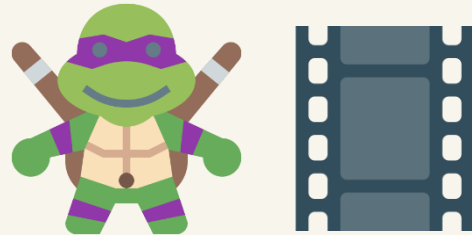
Knowing the specific content accessed by your target audiences is key to ensuring you deliver communications in the right way and at the right time.

YouTube



TV show clips and
YouTubers

Video On Demand



Cartoons/Films

Social Media



Pranks/Challenges

Broadcast TV



Cartoons/Animated

Want to know more about the specific titles that kids are watching across these platforms?
Get in touch to access the full report!

Brands need to understand shopping behaviors to ensure the purchase journey remains strong

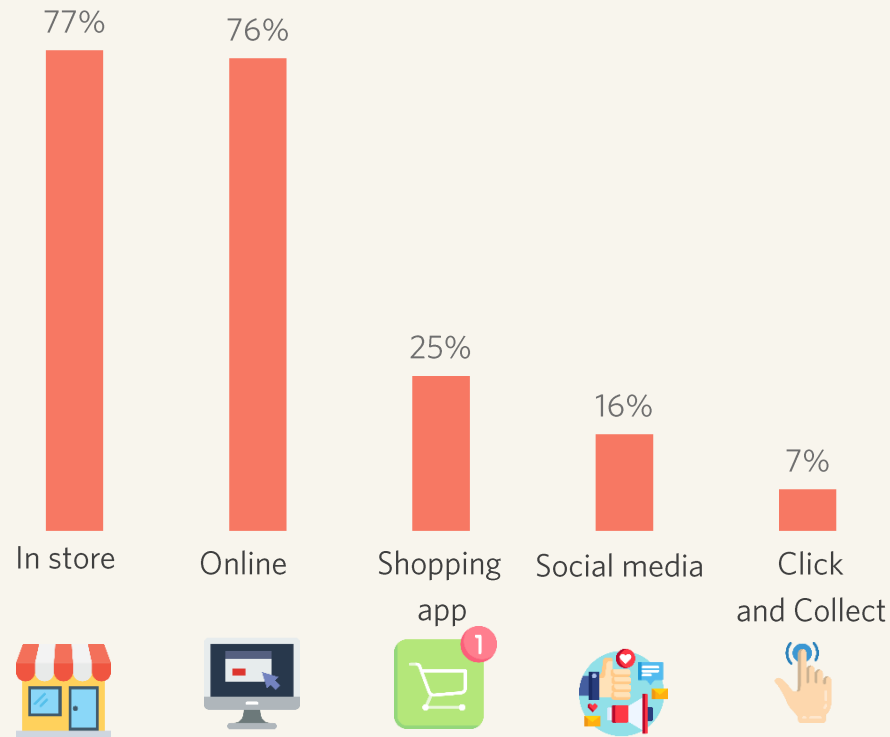


In-store and online equally important when it comes to purchasing



However nearly 6 in 10 moms say their shopping behaviors have changed in the last year

In which ways do you shop?



Want to find out more about how parental shopping behaviors have changed in the last year?

Then get in touch to access the full report!

In store is key for spontaneous small ticket items, with online the way to purchase products at higher price points

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For bigger ticket items, parents tend to use online platforms where they can get more details and search for deals

Gifts under \$20

Look online then buy instore 11%

Go online then buy at a later time 6%

Go in store then buy at a later time 4%

Gifts \$20-\$50

Look instore then buy online 14%

Go online then buy at a later time 9%

Go in store then buy at a later time 8%

Gifts more than \$50

Look instore then buy online 15%

Go online then buy at a later time 14%

Go in store then buy at a later time 11%

Toys are the top gift bought for kids with kids also key to inspiring purchase

16

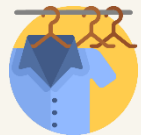


In store and online are important for inspiration for toys, however you cannot forget the influence of kids!

Top 5 Gifts



Toys
79%



Clothes
68%



Shoes
55%



Books
52%



Video Games
48%

Toys: Top Inspiration



My Child
46%



In store
39%



YouTube
37%

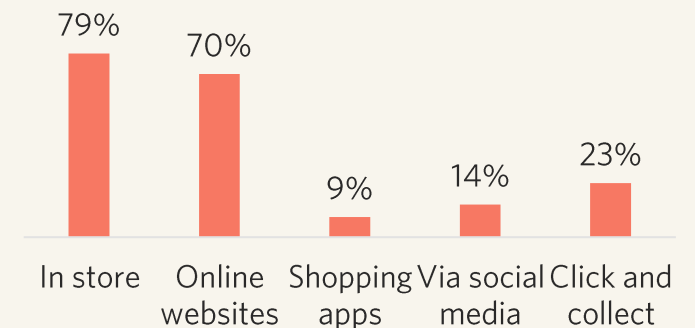


Online
32%



Broadcast TV
22%

In which ways do you shop for toys?



Access the full report to find out how other gift categories are purchased

A snapshot of insights for the USA kids media market



This is just a snapshot into the world of kids media and parents purchasing behaviors. We know that every child is different and that the behaviors of a 2-3 year old differ from that of an 8-9 year old!

In the full report you will have access to:

- *All of the data in this snapshot plus access to many more questions that dive deeper into media and purchasing*
- *Age and gender splits of the data for girls and boys aged 2-12*
- *Total level data and granular data filtering*



We know for brands understanding the core audience is key. Full access to the data will allow brands to filter by specific channels and platforms to see what their core audience looks like and their behaviors.

Examples of brands the data can be filtered by:

- *Netflix users*
- *YouTube users*
- *TikTok users*
- *Parents who are aware/buy specific toy brands*
- *Plus many more!*

....With many more insights available!



Get in touch to access the full report



Giraffe Insights is a leading global research agency, specialising in kids, youth and family audiences. Helping brands across the globe effectively reach and engage audiences, providing insights that ensure strategies are informed rather than predicted.

Giraffe Insights conduct bespoke research to meet individual company needs alongside running award winning propriety studies to inform industry knowledge.

‘Kids and the Screen: Changing the Channel’, was launched to provide the complete picture for kids’ video consumption across linear and online and is the first of its kind!

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Precise Kids is the world's first and leading Kid-Safe COPPA certified YouTube advertising platform using contextual intelligence to deliver brand safe, relevant and privacy-compliant video campaigns reaching young audiences and families.

Precise TV's market leading solution delivers best-in-class return on ad spend for toy brands. Precise TV spent 6+ years working with data scientists and market researchers to build Precise TV's Contextual Intelligence Platform powered by **advanced machine learning, Natural Language Processing** and data from the Kids & the Screen study.

Contact us:

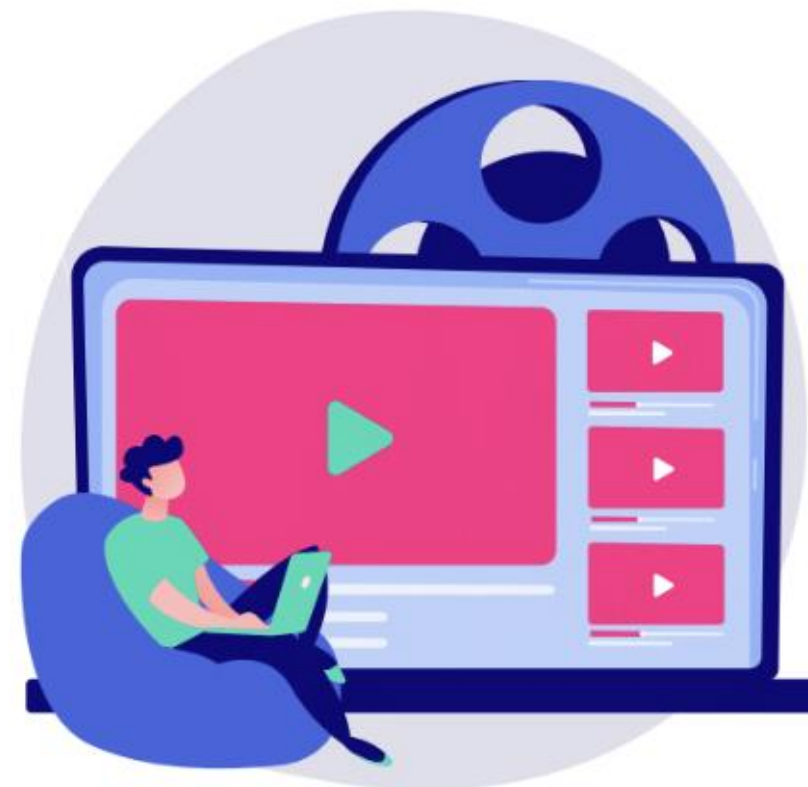
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Thank You!

