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**

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**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?

- Watch YouTube: 85%
- Watch Video on Demand: 71%
- Gaming: 60%
- Use social media (e.g. TikTok): 46%
- Watch Broadcast TV (e.g. Live or Recorded TV): 41%
- Watch other online videos: 37%
- Listen to the radio: 37%
- Watch content on other apps: 23%
- Go to the cinema: 17%
- Read magazines/Play Esports (e.g. competitive sports gaming): 16%
- 13%
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!

<table>
<thead>
<tr>
<th>Online</th>
<th>Video On Demand</th>
<th>Social Media</th>
<th>Broadcast TV</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>YouTube</strong></td>
<td><strong>NETFLIX</strong></td>
<td><strong>TikTok</strong></td>
<td><strong>Disney</strong></td>
</tr>
<tr>
<td>85%</td>
<td>61%</td>
<td>34%</td>
<td>25%</td>
</tr>
<tr>
<td><strong>nickelodeon</strong></td>
<td>21%</td>
<td><strong>Disney+</strong></td>
<td><strong>nickelodeon</strong></td>
</tr>
<tr>
<td>21%</td>
<td>53%</td>
<td>24%</td>
<td>24%</td>
</tr>
<tr>
<td><strong>CN</strong></td>
<td><strong>prime video</strong></td>
<td><strong>hulu</strong></td>
<td><strong>CN</strong></td>
</tr>
<tr>
<td>20%</td>
<td>39%</td>
<td>37%</td>
<td>22%</td>
</tr>
<tr>
<td><strong>nickjr</strong></td>
<td><strong>HBOMAX</strong></td>
<td><strong>FOX</strong></td>
<td><strong>Disney Jr.</strong></td>
</tr>
<tr>
<td>14%</td>
<td>22%</td>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td><strong>W</strong></td>
<td></td>
<td><strong>FOX</strong></td>
<td><strong>FOX</strong></td>
</tr>
<tr>
<td>9%</td>
<td></td>
<td>18%</td>
<td>18%</td>
</tr>
</tbody>
</table>

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

Q3a. Which TV channels have you watched recently?, Q3b. Which Video On Demand services have you watched recently?, Q3d. Which online websites have you watched content on recently?, Q3e. Which social media apps have you used recently?
Base: USA April 2021 (2000)
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 in 10 kids have recently seen commercials on YouTube

Where have you recently seen any commercials?

- YouTube: 70%
- Broadcast TV: 36%
- Video on Demand: 32%
- Online videos (not YouTube): 18%
- Social media: 17%
- While Gaming: 14%
- Radio: 12%
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.
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?**

<table>
<thead>
<tr>
<th>Platform</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>YouTube</td>
<td>51%</td>
</tr>
<tr>
<td>Broadcast TV</td>
<td>33%</td>
</tr>
<tr>
<td>Social Media</td>
<td>21%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Platform</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>YouTube</td>
<td>34%</td>
</tr>
<tr>
<td>Broadcast TV</td>
<td>15%</td>
</tr>
<tr>
<td>In store</td>
<td>9%</td>
</tr>
</tbody>
</table>

Q12: Thinking about the last thing you asked your parents to buy you, where did you see the commercial for it? Q14. Where do you see the best commercials?
Base: USA April 2021 (2000)
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.

<table>
<thead>
<tr>
<th>Where do you see the best commercials?</th>
</tr>
</thead>
<tbody>
<tr>
<td>YouTube 49%</td>
</tr>
<tr>
<td>Broadcast TV 29%</td>
</tr>
<tr>
<td>Social Media 24%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Thinking about the last thing you bought for your child, where did you see the commercial for it?</th>
</tr>
</thead>
<tbody>
<tr>
<td>YouTube 25%</td>
</tr>
<tr>
<td>Broadcast TV 12%</td>
</tr>
<tr>
<td>Online Website 10%</td>
</tr>
</tbody>
</table>

Q32: Thinking about the last thing you bought for your child, where did you see the commercial for it? Q33. Where do you see the best commercials for kids’ products?
Base: USA April 2021 (2000)
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:

**YouTube**
- Spend time alone: 41%
- Spend time with family: 35%
- It has my favorite content: 29%

Key platform for solo viewing and where they can watch their favorite content just for them.

**Video On Demand**
- Spend time with family: 59%
- Spend time alone: 29%
- It has my favorite content: 26%

A staple for family time viewing, particularly in the evenings.

**Social Media**
- Spend time alone: 38%
- Spend time with family: 28%
- Spend time with friends: 27%

A way to spend time alone and catchup with friends, with quick videos key.

**Broadcast TV**
- Spend time with family: 64%
- Spend time alone: 26%
- Spend time with friends: 24%

Watched alongside others and is considered safe.
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.

<table>
<thead>
<tr>
<th>Platform</th>
<th>Content Examples</th>
<th>Audience Interests</th>
</tr>
</thead>
<tbody>
<tr>
<td>YouTube</td>
<td>TV show clips and YouTubers</td>
<td>Cartoons/Films</td>
</tr>
<tr>
<td>Video On Demand</td>
<td>Cartoons/Films</td>
<td>Pranks/Challenges</td>
</tr>
<tr>
<td>Social Media</td>
<td></td>
<td>Cartoons/Animated</td>
</tr>
</tbody>
</table>

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?

- 77% In store
- 76% Online
- 25% Shopping app
- 16% Social media
- 7% Click and Collect

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!

Q35. In which of the below ways do you ever shop?
Base: USA April 2021 (2000)
In store is key for spontaneous small ticket items, with online the way to purchase products at higher price points. 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%

Q47r: Gifts that X- How do you shop for gifts at the below price points?
Base: USA April 2021 (2000)
Toys are the top gift bought for kids with kids also key to inspiring purchase

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

<table>
<thead>
<tr>
<th>Top 5 Gifts</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Toys</td>
<td>79%</td>
</tr>
<tr>
<td>Clothes</td>
<td>68%</td>
</tr>
<tr>
<td>Shoes</td>
<td>55%</td>
</tr>
<tr>
<td>Books</td>
<td>52%</td>
</tr>
<tr>
<td>Video Games</td>
<td>48%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Toys: Top Inspiration</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>My Child</td>
<td>46%</td>
</tr>
<tr>
<td>In store</td>
<td>39%</td>
</tr>
<tr>
<td>YouTube</td>
<td>37%</td>
</tr>
<tr>
<td>Online</td>
<td>32%</td>
</tr>
<tr>
<td>Broadcast TV</td>
<td>22%</td>
</tr>
</tbody>
</table>

In which ways do you shop for toys?

- In store: 79%
- Online websites: 70%
- Shopping via social media: 9%
- Click and collect: 14%

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

Q42. What types of gifts do you buy for your children? Q43. Where do you get ideas/inspiration for the below types of gifts? Q44. How do you shop for the below types of gifts? 
Base: USA April 2021 (2000)
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!
**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**.

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Thank You!