HOW, WHY AND WHEN DIVERSE KIDS AUDIENCES FIND, CONSUME AND STICK WITH CONTENT

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CONTENT

1 – INTRODUCTION

For years we have considered consumers and audiences as blocks, or defined criteria that made them easy to define. How does an 8-year-old boy differ from an 8-year-old girl; what do 2-4 year olds watch or how does a Brazilian 12-year-old differ from their English peer. Even complex segmentations are sensitive to these nuances. And whilst metrics collected in this digital world provide insights into actual behaviour they are still defined by the human parameters installed to collect that data. Diversity is not defined by their gender, race, living circumstances or some other label. It is defined by who that child is, how they were brought up, their development stage and their aspirations, etc. etc. etc. There are so many dynamic and fascinating traits that define the diversity that makes each child so wonderfully them.

As a father of two confident and challenging toddlers, a 4-year-old girl and a 3-year-old boy, I can attest to their unexpected and sometimes expected characteristics. But perhaps most concerning, to me, the dad, is their ability to coherently collaborate to dictate my mood and actions. How many parents have considered walking out of a supermarket in floods of frustrated tears and leaving them to their psychological charms!? But of course, it's not that easy to design and launch a product for each individual child. As customisable as an avatar in Club Penguin was, a Build-a-bear is, or Netflix's algorithms are in tailoring curation for each user, they are systems designed for the masses not the individual. So those over-simplified distinctions of age, gender and location do have some merit.

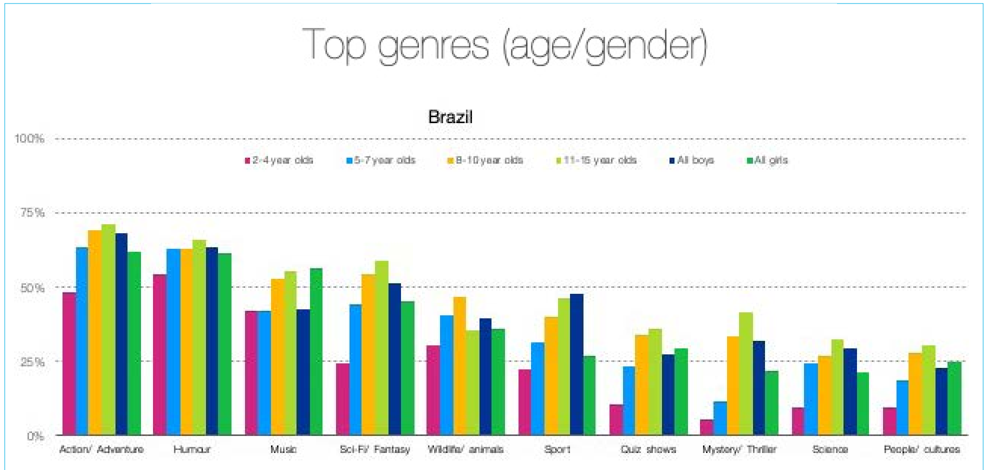
They allow us to forecast and measure audience size, which means we can invest in and scale content, platforms and product. We hope this paper on diversity provides realistic tips on how to fulfil the diversity that exists in young audiences. We will consider what diversity means in terms of audiences needs and unmet needs across:

1. The creation of content
2. The communication of content
3. The distribution of content

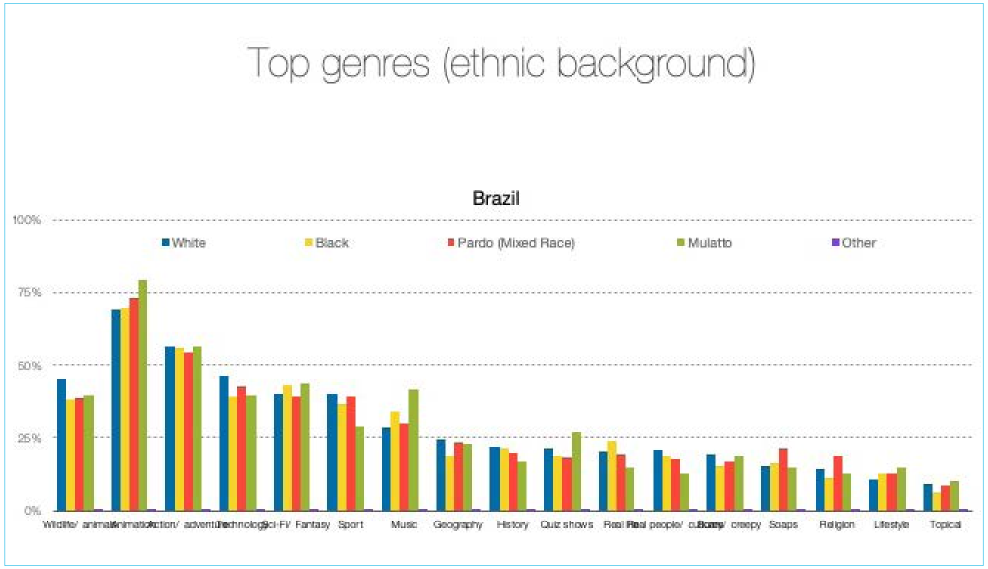
We have been asked to analyse Trends from different parts of the world, and this paper will consider families from Brazil, South Africa and the UK. Using Dubit Trends, which surveys over 16,000 2-15 year olds and their parents across 20 countries every year. ■

2 – The creation of content

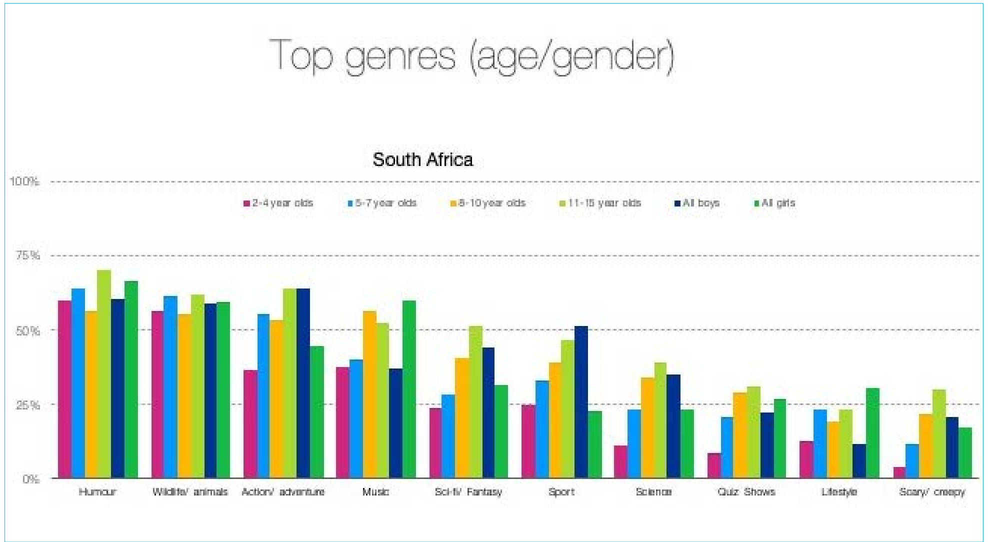
When broadcasters want to know what content to commission or acquire they can look at the ratings. Ratings are the trusted measure for knowing the audience likes. Shows that performed well in the ratings get recommissioned, whilst those that didn't are scheduled at off-peak times - and further series get cancelled. Streaming platforms have their feedback mechanism. Analytics reveals the number of plays a particular video or episode is viewed, whether the video was watched in its entirety or not, whether the viewer went on to watch another video in the series or even watched the same one multiple times. Ratings and analytics make it easy for broadcasters and distributors to commission series audiences want to watch. It's all in the numbers - you 'give the nod' to the series being watched and cancel the ones they don't. But by using ratings are content creators ignoring minority audiences and minority tastes? Are there other ways to determine what audiences might like and what the size of the opportunity is?
In order to understand what audiences want, we start by looking at the type of content (or genres) they express an interest in. To start with, the charts below show which content genres, which are most popular across age and gender.



Starting in Brazil, action/adventure is the most popular genre for all ages except 2-4 year olds For action/adventure think Power Rangers or Teenage Mutant Ninja Turtles but it could equally refer to Bear Grylls TV series or Indiana Jones movies. Humour is the next most popular, which includes everything from sitcoms like The Thundermans, Mr Bean's slapstick adventures to highbrow comedy like We Bare Bears. There is little difference in preferences between the genders for the top two genres. However, genres like music appeal more to girls, whereas (not unexpectedly sport has a clear boy skew. What about the less popular genres? Well you wouldn't expect 2-4 year olds to have much interest in topicality, but clearly 8-15 year olds have an appetite for content that's topical.



In terms of ethnic background, there are some slight differences to point out. Action/adventure, music and quiz shows have more appeal amongst the Mulatto (or black and white). Soaps and religion over-index amongst the Pardo (or mixed race), whilst wildlife/animals has more appeal amongst whites.



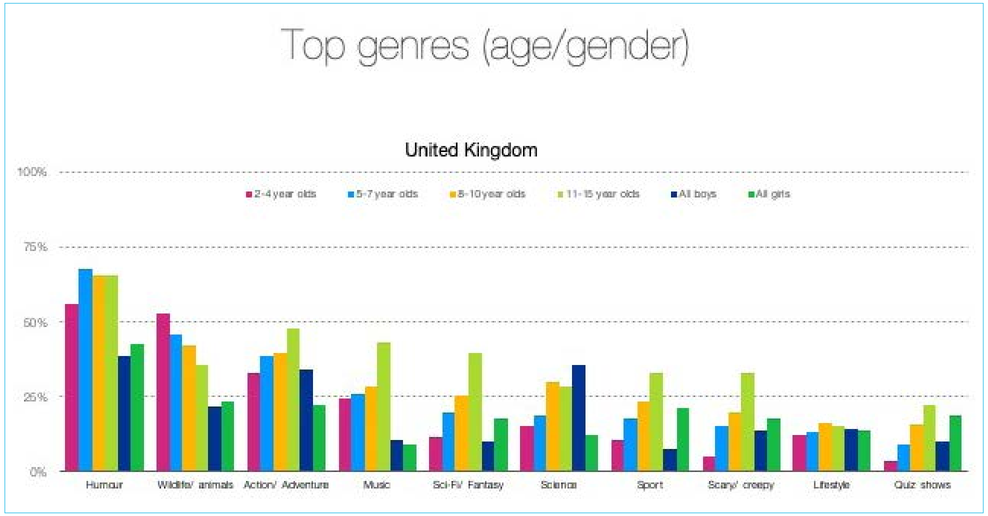
Humour and wildlife/animals are the genres with most appeal across ages and gender in South Africa. Young teens and boys like action/adventure but girls show a clear preference for music. Interest in sport grows with age and is the fourth most popular genre with boys. There is a marked interest amongst teens for content related to mystery/thriller, soaps and history/period for teens.

Humour is also the top genre in the UK, with strong appeal across all ages and genders. After humour, wildlife/animals is most popular amongst 2-10 year olds, whilst action/adventure appeals the most to 11-15 year olds and boys. Girls express a clear liking of music - although they like humour and wildlife/animals more, and they are also interested in lifestyle and soaps. Teens and boys really like sport. Teens also have an interest in scary/creepy and mystery/thriller

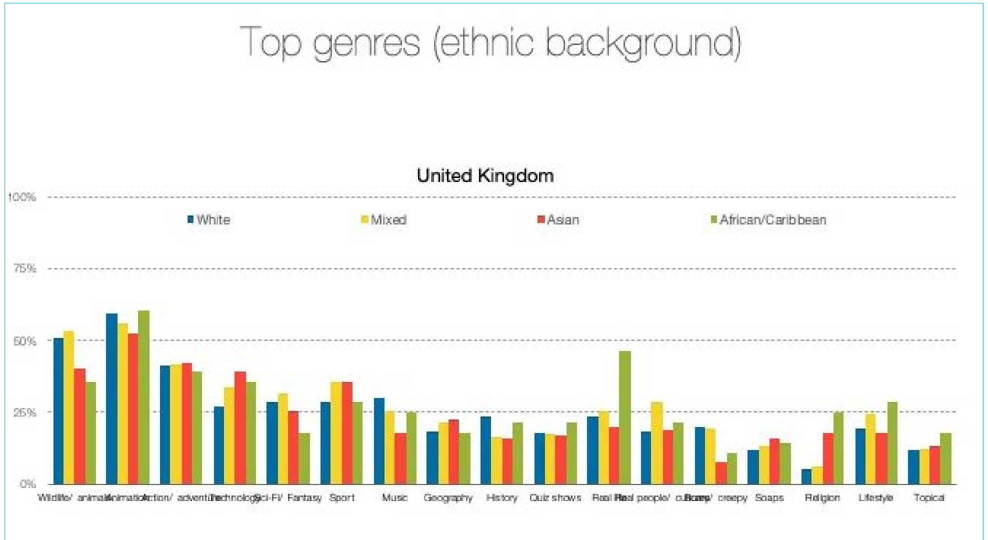
Looking at the most popular genres in the UK by ethnic background, wildlife/animals has more appeal amongst whites and mixed race, whereas Asians and Mixed race indicate a liking of real lives/people, religion and lifestyle content.

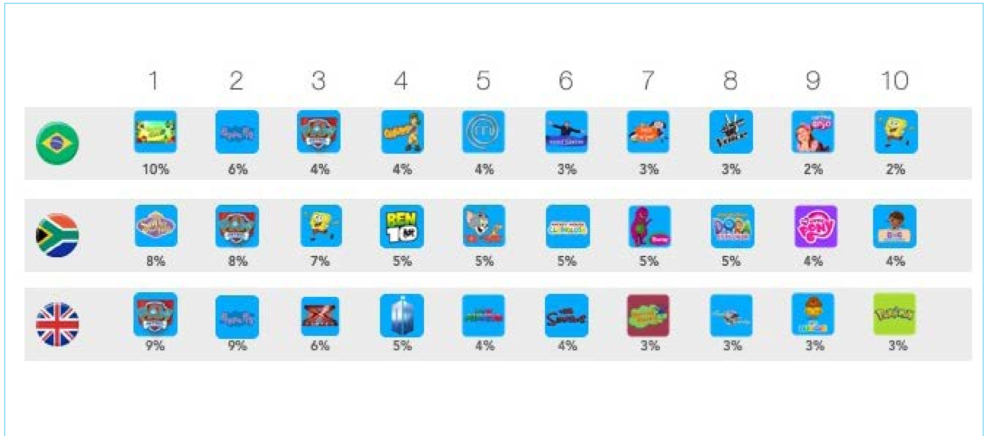
Now we know which genres appeal most to the audience, but what about the content they engage with - how does it compare to the content they like most?

The chart above shows the 10 TV shows, based on spontaneous mentions from Brazil, South Africa and the UK for 2-15 year olds based on



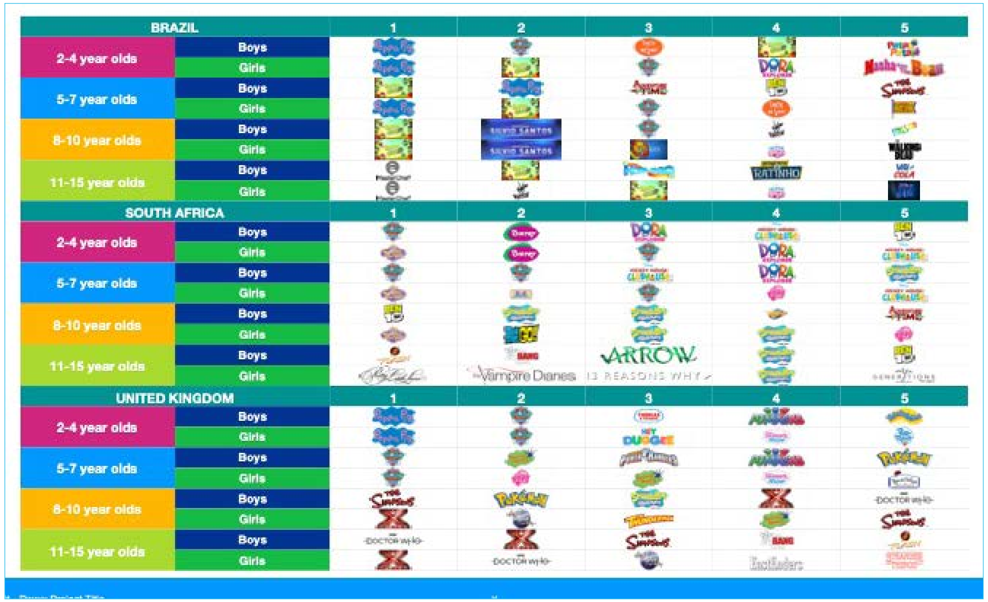
2 – The creation of content



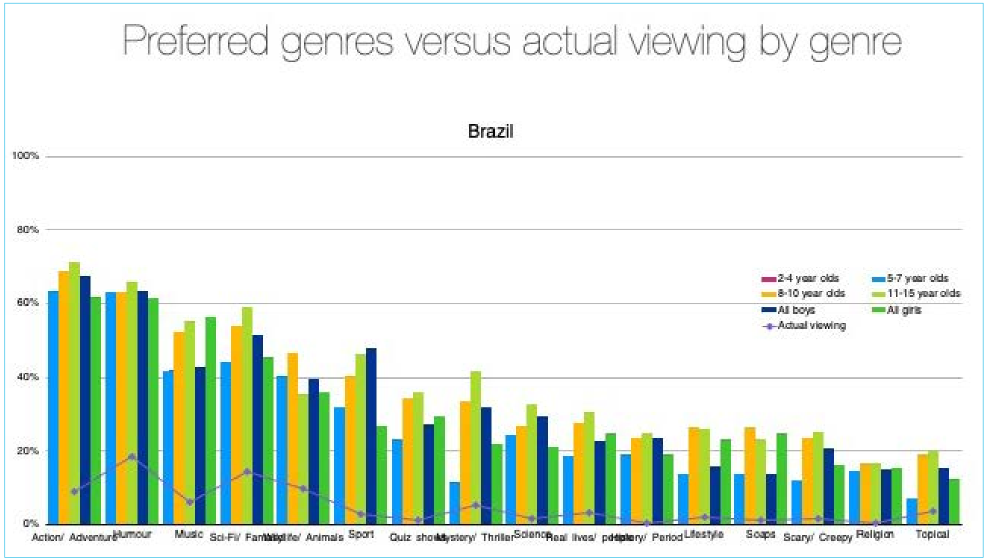


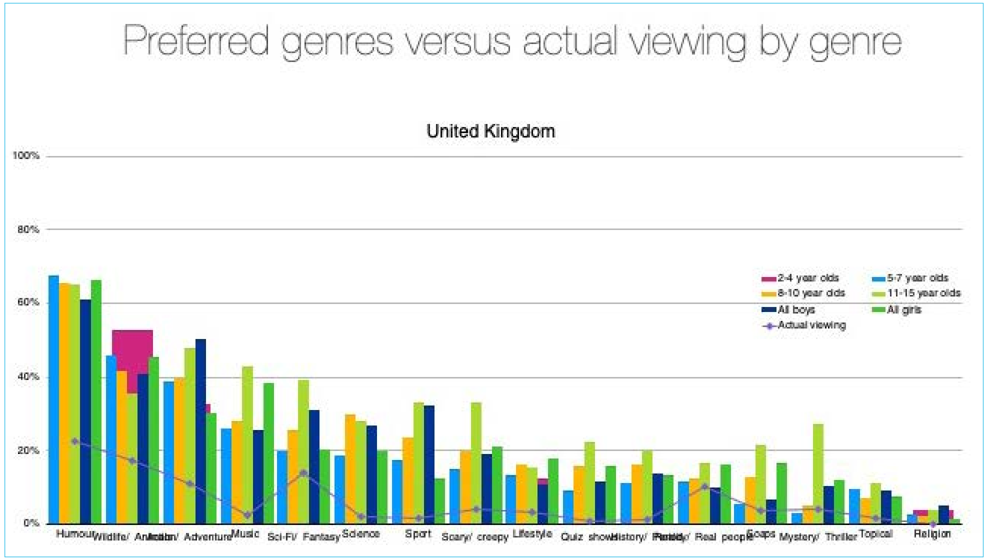
the most recent Trends fieldwork. The most popular shows are a mix of made for children animation with global distribution like SpongeBob SquarePants and Peppa Pig; generalist shows like X-Factor and Masterchef along with locally made shows. Key genres covered by the top 10 shows include humour, sci-fi/fantasy, reality and wildlife/animals.

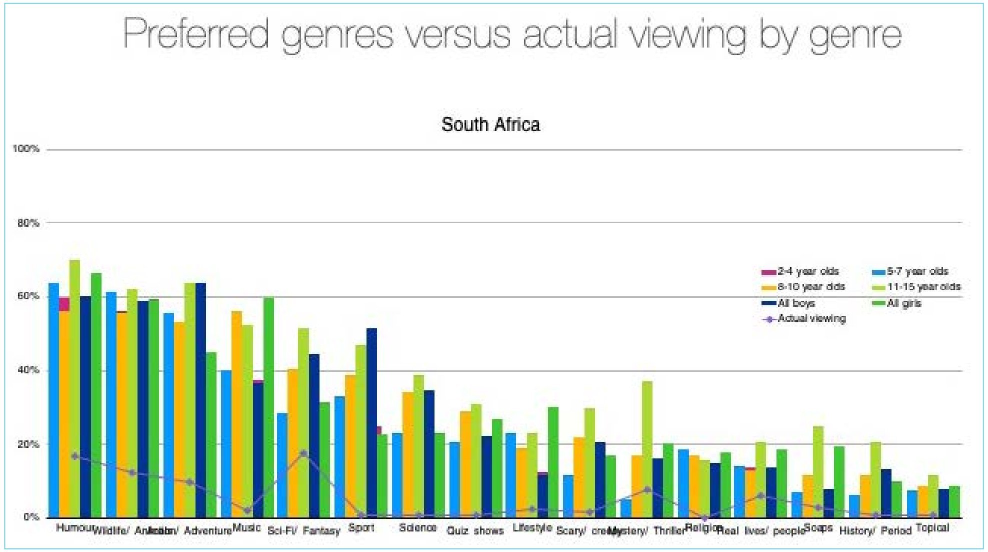
The above table shows the top 5 shows by age, so much content is crossing the gender barrier showing how unimportant gender is in contrast with age.



Are the audience's tastes in each country reflected in the shows/series that they like the most? In order to do this we have analysed the shows kids have spontaneously mentioned and categorised each by genre. It should be noted that most shows fall into multiple genres, however we have singled out a key genre for each show. The next three three charts show the popularity of genres by age and gender as well as the genres of the shows kids like the most.







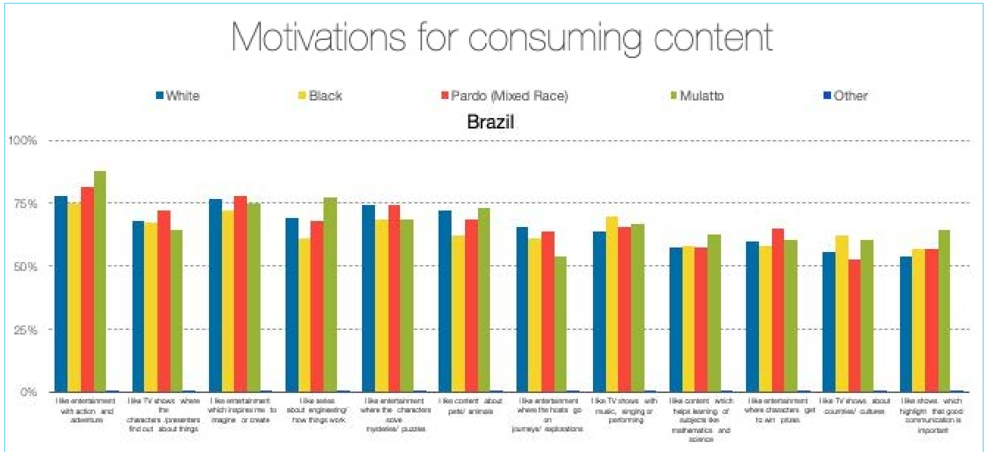
In Brazil although action/adventure is the most popular genre, kids watch more humour, sci-fi/fantasy and wildlife/animals than action/adventure. It could be that action/adventure content that is available isn't suitable or doesn't appeal to kids, suggesting there is an opportunity for more kid appropriate action/adventure themed content? Music is another genre, which appears underserved in the kids' space.
Humour is the top genre in South Africa, however the most popular genre based on the shows kids spontaneously named is sci-fi/fantasy, which includes everything from PJ Masks and Shimmer and Shine to Doctor Who and The Vampire Diaries. There is closer alignment with the top 3 genres and the shows they it ranks fifth.

2 – **The creation of content**

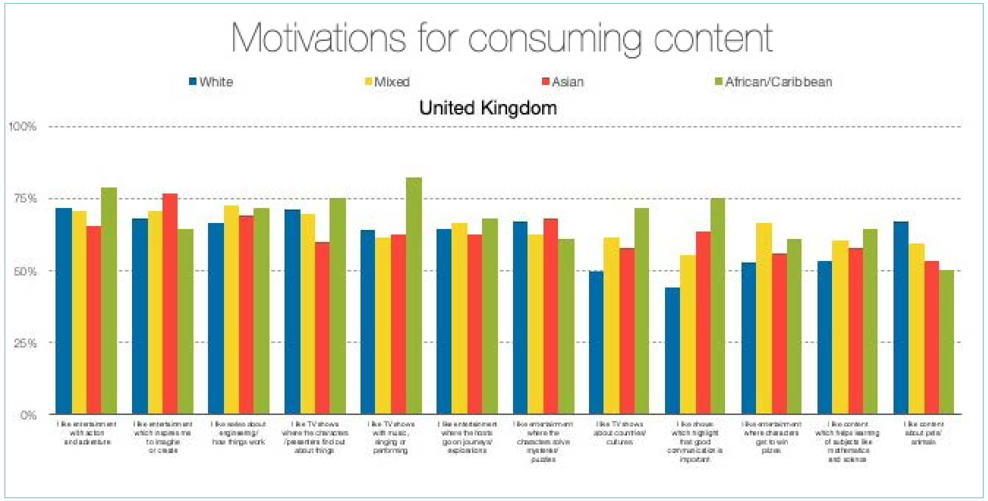
In the UK the top genres based on the shows watched are humour and wildlife/animals. Sci-fi/fantasy shows are more popular than the third ranked genre, action/adventure and although it's a lowly twelfth in the rankings of genre popularity, reality/real people is ranked sixth in terms of the shows that kids have mentioned.

In all three countries there is evidence that there is a content void in some genres, i.e. action/adventure and music. Are there other opportunities where content creators could develop engaging content for children and are the differences between ethnic groups? From data we have on Brazil and the United Kingdom we can see what are the motivations for engaging with content.

Action/adventure is a key motivation for kids engaging with content,



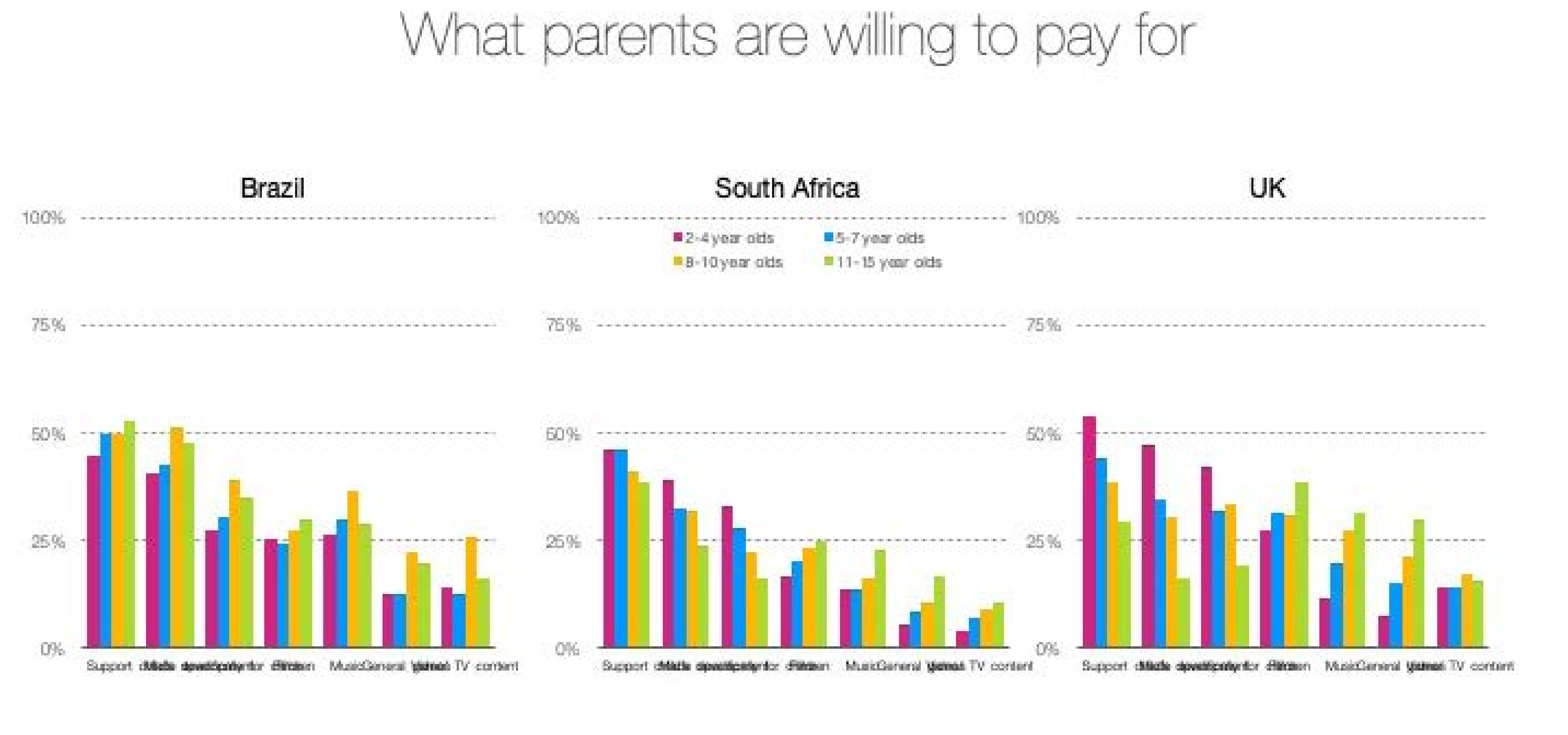
especially amongst the Mulatto audience. It's the most popular genres, but underserved in terms of the shows kids like. Out of the top 5 motivations for consuming content, only wildlife/animals appears to be well served. There appears to be opportunities for content creators to make shows that inspire kids' imagination, allow them to solve puzzles and understand what makes things work. Generally the different ethnic audiences align however there are differences that are worth pointing out. The Pardo audience has an affinity for shows where presenters find out about things along with quiz shows where prizes can be won. As well as action/adventure the Mulatto audience also like programmes that explain how things work, emphasise the importance of good communication and series that profile different countries and cultures. Music and performance as well as shows reflecting different cultures are popular with the Black audience.



The top motivation ion the UK for watching something is that it has action/adventure - this is particular important for the Asian audience. Although not the most popular genre, based on the shows watched it is ranked fourth. Programmes that encourage kids to use their imagination or be creative have appeal across the groups, as do music format and shows where presenters explore or go on journeys. Presenters finding out about things, solving mysteries and programmes that profile other cultures resonate strong with the Afro-Caribbean audience. There is a strong appeal amongst white audience backgrounds for series related to curriculum subjects like science and mathematics. ■

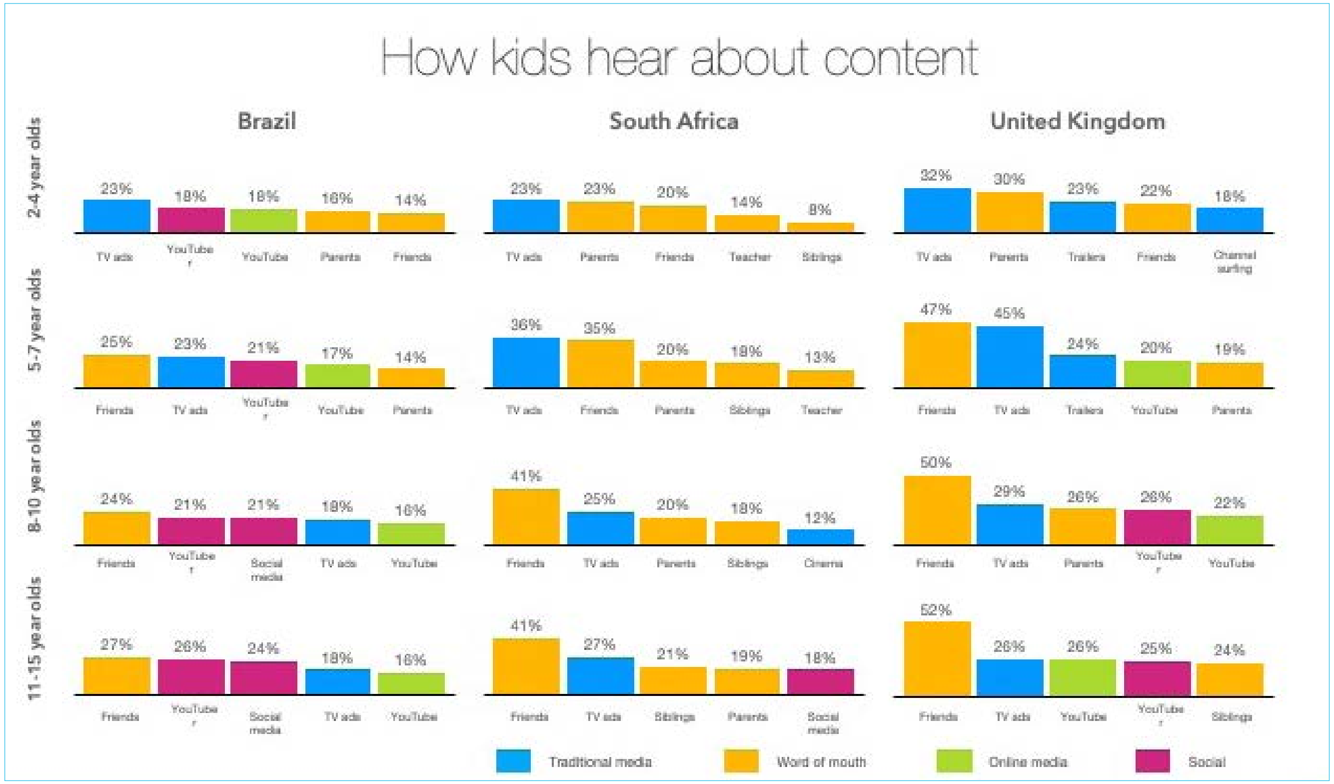
3 – Communication of content

Parents are willing to pay for content they perceive will benefit their child - proof if it was needed that a brand has to communicate the benefits to its audience. The charts below show the types of products parents say they are most willing to pay for. Parents in all three counties concur their willingness to pay for products that are educational, support their child's development or it have been specifically developed for children. Parents are less willing to pay for a product or service aimed at the general audience.



3 – Communication of content

In South Africa and the United Kingdom, parents of 2-4 year olds are most willing to pay for educational content, content that support their child's development or products made specifically for kids. The top 3 reasons parents in Brazil are willing to pay for content aligns with South Africa and the UK, however in contrast with the other two countries the proportion of parents willing to pay increases as their children age-up. For the generalist products there is evidence that more parents are willing to pay for generalist content like music and TV shows as their children get older.
Children become familiar with brands at a young age, mostly driven by parents, sometimes older siblings will have an influence. Once children get to school the influence of parents wanes and friends become a key source of content discovery and they get more influential as children get older. In fact, in many countries by the time a child is 8 a YouTuber can be more influential than parents when it comes to content discovery. TV adverts are the primary paid-for channel, however digital ad-platforms are becoming more effective at driving brand and content awareness. The charts on the next page show the top 5 ways children in the three countries hear about a new piece of content. South Africa retains its love of traditional platforms, with TV and word-of-mouth being most effective. In the

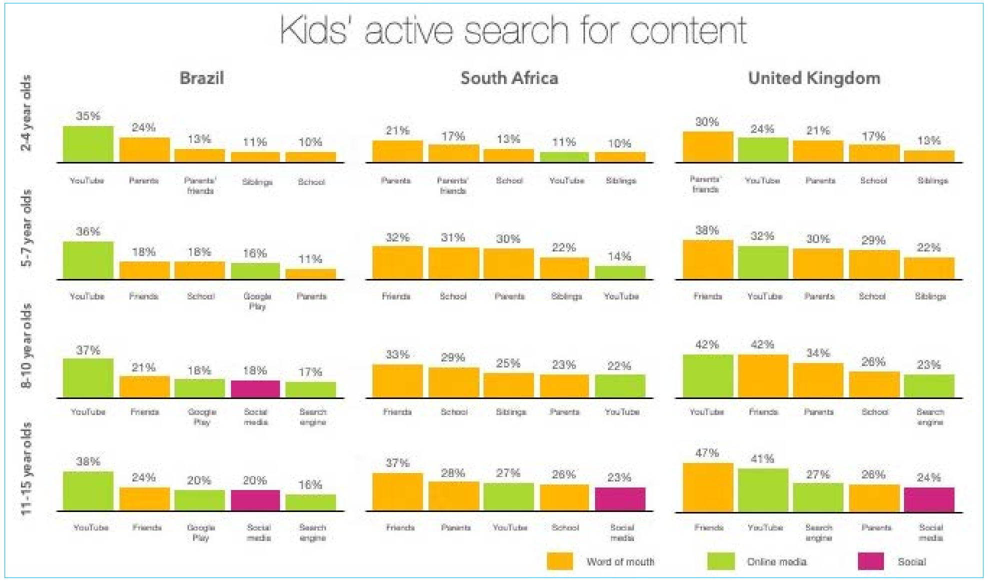


UK, awareness is still driven by friends and TV advertising whereas in Brazil YouTubers and social networks are more effective at driving awareness, especially amongst older children.
There is a strong influence of trusted sources for children's either want to validate something about a brand they've become familiar with or actively search for something new to watch or play with. The charts below how audiences in South Africa and the UK rely on people they trust through until they are into their teens, whereas audiences of all ages in Brazil rank YouTube as their top destination for searching. When actively looking, children will reference parents, friends and siblings and they also turn to YouTube. Social media is a 'go-to' place for search from the age of 8 years in Brazil and 11 years in South Africa and the UK. ■

4 – Distribution of content

In today's always-on, unscheduled world, kids want structure, in their daily lives that means having a schedule - it help them focus and discover, and satisfy needs. Kids want choice - customised content that's just right for them - but as every parent knows they do best when they're given choice within parameters.
In the absence of being dependent on someone else's schedule, kids organise their own. Their choices are based on a number of inter-related factors - time of day determines how much time they have available, what they've been doing previously and what they're likely to be doing next feed into their mood or emotional state.

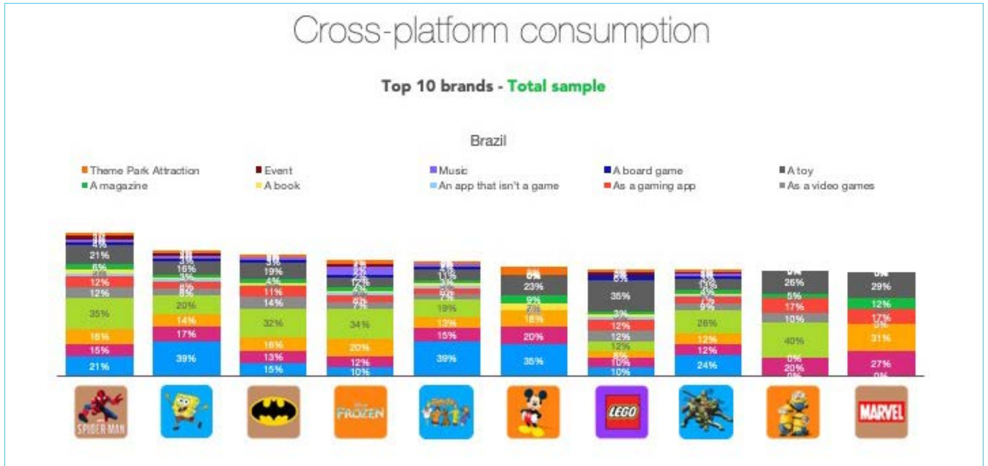
Emotional scheduling begins even to identify patterns of what device a child is likely to choose at any particular time, where they're likely to be using it, and whether they're likely to be alone or with others. A typical weekday for children in most countries starts with the linear TV. It's the fastest route kids can take watch something. Time is short, and kid linear TV avoids the necessity scrolling through menus or searching the planner to find something to watch. When school-age



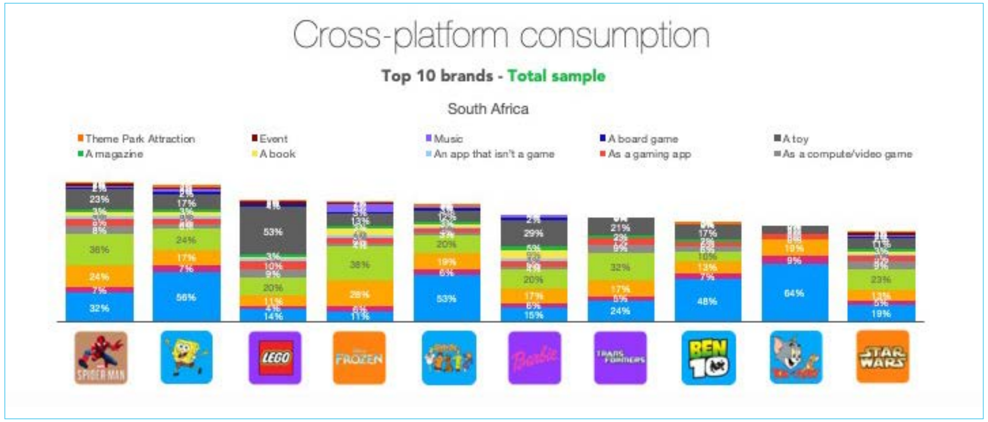
children are in class, parents (or carers) have time to spend focussed on the youngest child. We often find this time of day is when toys are played with, creative activities take place or parents read. Once out of school children play, this can be socially outdoors or in winter time may be on devices. In the early evening the television takes precedence. However, unlike in the morning when the kids have the remote control, in the evening more 'generalist' shows are watched. Finally, bedtime is reading time.
Brands need to place their content where kids are. This is critically important since children are using different screens and devices at different times of the day. When kids come home from school and go on their tablet or smartphone if they can't find your app they will likely go on to use one of your competitors brands. Worse still if you don't have an app, kids may assume your brand can only be consumed on one platform. As kids media continues to fragment losing one or more touchpoints with your audience means fewer eyeballs and ultimately

4 – Distribution of content

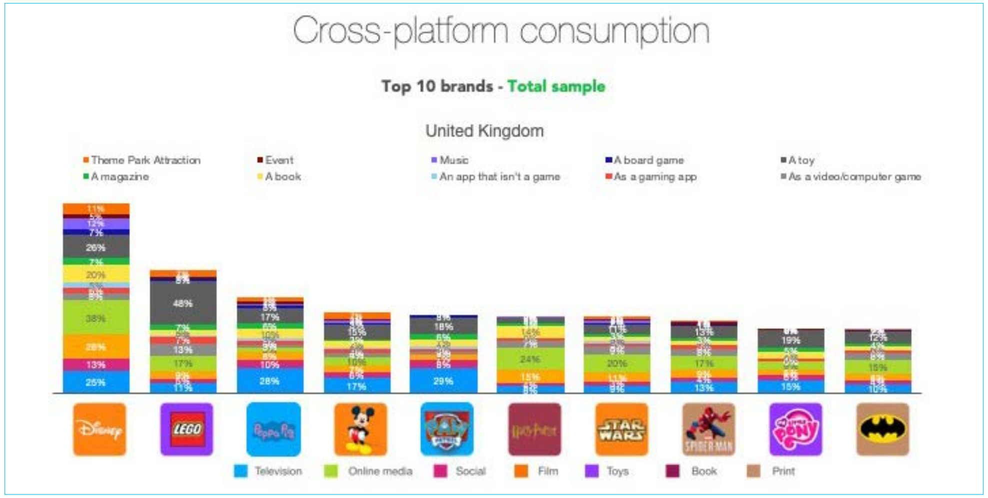
less revenue. The charts below show the top 10 Multiplatform brands in each of the three countries.
Spiderman is the consumed the most across different platforms, followed by SpongeBob SquarePants and Batman. Brands are generally consumed the most on the original distribution platform, i.e. television for SpongeBob, Scooby Doo and Teenage Mutant Ninja Turtles. LEGO is most consumed as a toy and whilst most brands on the chart have competitive levels of consumption as a toy bran extension, only Minions, Marvel, Spiderman and Batman achieve double digits for use as a gaming app.



Spiderman and SpongeBob SquarePants also achieve the highest cross-platform use in South Africa. More evidence that brands tend to be consumed most on their originating platform can be seen in the last chart where LEGO is consumed most as a toy, Disney's movie 'Frozen' as a move and Scooby Doo, Ben 10 and Tom and Jerry as TV shows. It's to be expected that LEGO, Barbie and Transformers are consumed as toys, but Spiderman, SpongeBob SquarePants, Disney and Ben 10 are also consumed as toy brand extensions.



With its diversified portfolio of brands it's not surprising that Disney is the most consumed cross-platform brand, followed by LEGO and Peppa Pig. With the exception of Harry Potter, most non-toy brands are also being consumed as toys. There is evidence of some consumption of these brands as app games but nowhere near the levels of consumption as toys.



CONTACT US

mipvisitors@reedmidem.com

mipcom

mipjunior