2017 CLICKS, TAPS & SWIPES
CONTENTS

BRAND LOVE STUDY Overview & Methods

2017: The Digital Landscape

Kids’ Digital World

- **Using** – an overview of the devices and peripherals kids are using in 2017
- **Watching** – a look at kids’ viewing habits, linear networks and streaming video
- **Playing** – a close-up on console- and app-based gaming and connected playthings
- **Connecting** – an analysis of communications services and social media platforms
- **Listening** – a deep-dive into how kids’ music-related behaviors are evolving
- **Searching** – a look inside kids’ search-based behaviors and brands
- **Wearing** – a glimpse at how wearables are impacting the digital landscape
- **Commanding** – an examination of kids’ emerging voice-based interactions

A Look Ahead

BRAND LOVE
Welcome to the 2017 CLICKS, TAPS & SWIPES REPORT, a comprehensive look at the digital ecosystem of U.S. kids and their families.

The report—published by SMARTY PANTS® youth and family research firm—is derived from primary qualitative research and quantitative findings from the 2017 BRAND LOVE® study.

BRAND LOVE® is a proprietary study of the lifestyles and behaviors of kids and tweens ages 6-12, including their leisure activities, digital engagement, self-perceptions, and product adoption patterns. The study also covers kids' awareness, affinity, perceptions, and usage of hundreds of family-facing brands. Parents of 6 to 12-year-olds evaluate the same brands, providing a holistic look at U.S. families with children.

The 2017 wave of the annual study—its 9th—was fielded online among a nationally-representative sample of over 8,200 kids and tweens ages 6 to 12 and their parents. Data collection took place in June and July in order to capture both school year and summer learning.

Kids and parents evaluated a total of 347 brands across 20 categories in 2017. Each participant assessed up to 15 brands, providing both closed and open-ended responses.

• 347 brands
• 20 categories
• 8,292 kids & tweens ages 6-12
• 8,292 parents of 6 to 12-year-olds
• 15 brands per respondent
• More than 24,000 verbatims
• Tracking since 2009
Closed-ended responses included rating each brand on **30 attributes & descriptors:**

- I can make it my own/personalize it (Customization)
- Active/physical
- Good for me/healthy/safe
- A good value
- I can buy it with my own $ (Affordable)
- Made well/good quality (High-Quality)
- Been around a long time (Heritage)
- Has great varieties/options
- Easy to use/do/make
- Has great commercials/advertisements
- Has a great website
- Has a great app
- Does good things for the environment/world
- Convenient/portable
- Exciting/adventurous
- Tastes great
- For the whole family (All-Family)
- For kids my age
- For kids younger than me
- For kids older than me
- Good for connecting with others (Social)
- My mom/dad let me have/use it (Allowed)
- Challenges/educates me
- Gives me rewards/rewards me
- Innovative/always has new things
- Fun
- Different/unique
- Cool/trendy
- Looks good/good design
- Hard to get/find (Elusive)

An analysis of these attributes leads to a deeper understanding of how brands perform and categories behave.

Kids and tweens also rated how **popular** they perceive each brand to be. The results aid in mapping brand momentum.

### Key metrics

Two **proprietary measures** are referenced throughout the report:

**K** KIDFINITY is an aggregate measure of kids’ brand **awareness, love, and popularity** perceptions. Composite scores range from 0 to 1000, with most brands scoring between 400 and 900 points.

**P** PARENTFINITY is a similar, independent composite metric that factors in parents’ brand **awareness** and **love**. Scores also range from 0 to 1000.

Both measures have a .86+ correlation to current and future usage, making them critical indicators of brand success.

Brands can be ranked based on their KIDFINITY and PARENTFINITY scores—across all brands and within category. Note that **absolute** scores are a truer indicator of YOY brand performance, since rankings can be impacted by the number of brands and the actual brands included in the study each year.

All brands referenced in the report in **bold red** are part of the 2017 BRAND LOVE® study.
When it comes to kids, the digital world of 2017 resembles 2016, except that everything is bigger and bolder. This year, kids are using more devices more often, engaging with more content in more ways, and reporting even more love and affinity for their favorite digital brands.

Generation Z is increasingly going mobile, seeking innovation and experimentation, demanding customized and curated experiences, exploring new ways to express themselves, and embracing any opportunity to be creative.

Brands that are able to deliver on kids’ expectations for portability and personalization are capturing kids’ interest—and those that are constantly evolving and refreshing are keeping kids’ attention.

There is no question that kids are addicted to tablets. Their large screens and intuitive, touch-based interactivity make them ideal devices for young children. However, tablets are increasingly serving as digital training wheels and stepping stones to the more personal and portable smartphones.

Children are more likely to personally own tablets, and their overall usage is increasing, but thanks to parents sharing smartphones (which they are more likely to have on hand than tablets), children are watching, playing, tapping, and swiping on smartphone screens with greater frequency and at younger ages than ever before.
Regardless of device, the dominance of mobile is evident in the fact that having a great app is a key driver of both PARENTFINITY and KIDFINITY. Across categories, families expect the brands they use and love to have a strong digital presence. If kids can’t interact with their favorite brands on their devices, those brands risk becoming out of sight, out of mind. Brands with strong mobile apps, such as YouTube, Netflix, and Amazon, are leading their categories, scooping up legions of kid and parent followers as they speed into the future.

Despite the headlines and hype, television is still kids’ most-used media platform. Almost every kid uses their home’s biggest screen each week, making TV the go-to device across all content forms. The continued prevalence of TV can be attributed to its ability to evolve. Once the dedicated home of cable or satellite networks, families can now also use their TV to stream SVOD shows, watch YouTube videos, play console-based video games, and surf the web.

Gaming consoles may not offer the same breadth of content as mobile devices or the ability to seamlessly transition between activities, but millions of kids are still using them on a weekly basis. Consoles fill a different need than mobile or handheld gaming options. Being connected to large television screens certainly increases the sense of immersion. It is also possible that consoles’ role in shared family game play has secured their survival, as parents and kids are able to play together in a way that mobile does not quite allow. The continued love for classic gaming brands—such as Mario and Madden—supports the idea that parents are reinforcing the use of a media platform that they loved as children...as well the love of iconic brands that go along with it.

Streaming dominates TV viewing

Though kids are still tuning in to TV screens, the type of content they are sitting down to watch is changing. Linear kids’ networks are holding strong, and networks that deliver topics of interest to parents and kids are bringing families together. Still, in this on-demand culture there is no planning the day around the airing of favorite show. Thanks to streaming video on demand (SVOD), Gen Z only knows a world in which they watch what they want when they want.

Although ease and convenience are key, the appeal of mobile devices is not just about portability. It’s also about multi-functionality. Smartphones and tablets are a one-stop shop for playing, watching, connecting, and creating that allows kids to multitask and seamlessly swipe between activities. Although kids’ core needs surrounding entertainment and engagement are evergreen, the ways in which they are fulfilling these needs is evolving—and mobile devices hold the keys to the digital kingdom for kids.

Traditional media is not dead

Kids may prefer mobile, but these devices are not replacing more traditional hardware like TVs and gaming consoles. Rather, kids’ usage is additive—their collective engagement and consumption continues to grow, with all platforms still playing a notable role in kids’ lives.
It goes without saying that Gen Z is comprised of digital natives. They have been surrounded by devices of all kinds since birth, and as they grow and learn, their digital world evolves right alongside them.

**Kids’ digital ecosystem**

To truly understand kids’ digital lives in 2017, it’s important to start by identifying the devices that comprise their ecosystem—the hardware, the platforms, and the peripherals, and how often they use them.

The results are clear. Whether looking at usage at the daily or weekly level, TV leads, followed by smartphones, tablets, consoles, and then computers. Handheld devices like **Nintendo 3DS** follow, and wearables and virtual reality headsets trail behind.

While the world is abuzz with news of tablets and mobile devices, it’s important to remember that **TVs are still the most commonly used devices in kids’ lives**. A full 84% of all children are watching a TV screen at least daily, and 95% do so at least several times per week. In many homes with children, if the lights are on, the TV is on, too.

Understanding kids’ smartphone usage is also key. Not only does daily phone use trump tablet use—which many assume is the most frequently used device among kids, but it is also growing more than any other device/hardware or peripheral. While many kids 6-12 don’t own their own phones yet, they all have parents and caregivers who do. And the simplicity, cost effectiveness, and convenience of passing a phone to a child versus buying them a tablet and always having it on-hand results in more daily smartphone than tablet use—even among 6-8s.
Frequency of Kids’ Hardware/Device Usage, 2017

<table>
<thead>
<tr>
<th>Device/Activity</th>
<th>2016 (%)</th>
<th>2017 (%)</th>
<th>Change (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV</td>
<td>58%</td>
<td>79%</td>
<td>21%</td>
</tr>
<tr>
<td>Phone/Smartphone</td>
<td>11%</td>
<td>16%</td>
<td>5%</td>
</tr>
<tr>
<td>Tablet</td>
<td>26%</td>
<td>14%</td>
<td>-12%</td>
</tr>
<tr>
<td>Video Game Console</td>
<td>22%</td>
<td>15%</td>
<td>-7%</td>
</tr>
<tr>
<td>Laptop Computer</td>
<td>29%</td>
<td>18%</td>
<td>-11%</td>
</tr>
<tr>
<td>Desktop Computer</td>
<td>39%</td>
<td>21%</td>
<td>-18%</td>
</tr>
<tr>
<td>Handheld Gaming Device</td>
<td>44%</td>
<td>11%</td>
<td>-33%</td>
</tr>
<tr>
<td>Smartwatch/Tracker</td>
<td></td>
<td>6%</td>
<td>-6%</td>
</tr>
<tr>
<td>VR Headset</td>
<td></td>
<td>6%</td>
<td>-6%</td>
</tr>
</tbody>
</table>

Base: Kids 6-12

An evolving system

As technology evolves, so do kids’ screen-based behaviors. Today, these shifts are happening more quickly than ever. More devices and accessories are available each day, and there is an explosion of content and features for each.

Compared to just a year ago, more kids are using smartphone devices daily. And there is a slight positive change in TV use as well. All other devices have fewer kids who use them daily. Tablet use is down by 2%—most likely a clean swap for phones being up by 2%. Laptop and desktop computers are also down from 2016.

Video gaming consoles and handholds show the greatest decline in number of daily users ages 6-12. Gaming behavior itself is increasing, and usage of phones, tablets, and even computers for gaming purposes is more common now than in 2016. Each of these devices is chipping away at the reliance on hardware dedicated to gaming that tends to be more immersive than casual.

2016-2017 Change in Kids’ Daily Hardware/Device Usage

- Smartphone: 2%
- TV: 1%
- Tablet: -2%
- Desktop: -3%
- Laptop: -3%
- Video game Console: -5%
- Handheld Gaming Device: -6%

Smartwatches(trackers) and VR headsets are new to the study in 2017

Base: Kids 6-12
More, more, more

Kids’ most frequent digital activity is watching—watching shows, watching movies, and watching short-form videos. Watching beats out playing, connecting, listening, and all other forms of digital and screen-based engagement.

The percentage of kids who consume TV, movie, and video content continues to rise—across platforms. Tablet-based consumption isn’t stealing from TVs, and mobile isn’t borrowing from computers. Kids’ cross-platform media usage is accumulating; it’s not replacing. Viewership on all devices is up. Content options are up. And overall screen time is up.

The biggest screen wins

TVs are not only the most used screens among kids 6-12 (see Using section), TV screens are still the go-to device for content. A look at viewing behavior reveals that across all content forms, TVs are the most widely-used screens, and by a large margin. And TV viewing habits are virtually identical across kid and gender.

While 93% of kids watch shows on a TV at least weekly, only 58% do so on tablets, and around 50% watch on smartphones and/or laptops.

Likewise, nearly nine out of 10 kids watch movies on a TV screen each week, while movie viewership patterns on tablet, phone, and computer mirror that of TV shows at considerably lower percentages of kids. Boys and girls ages 6-8 are slightly more likely than 9-12s to watch movies on a TV screen, but otherwise there are no differences in movie consumption by kid age or gender.

The shared living room, den, and playroom screens are definitely still plugged in.
Notice that tablet, smartphone and computer screen-based viewership is growing at a quicker rate than TV. The surge in short-form video undoubtedly plays a role in kids being on smaller screens, but their long-form programming needs are increasingly being met on these devices as well.

Usage patterns for long-form content are virtually identical between younger kids and tweens. Contrary to popular perception, younger kids are not watching more content on tablets while older kids are watching more on phones. There is no meaningful difference between the age groups for either TV shows or movies. Tweens just happen to be more likely to own the phone.

Short-form video surges

While the overall volume of TV shows and movies has not radically changed, the deluge of videos kids now have at their fingertips is incredible. Millions—uh, make that billions—of videos are part of kids’ video libraries in 2017.

The number of kids who say they watch videos on an app or website at least weekly is now 76%, more than double the percentage who viewed digital videos in 2015. On a daily basis, this number is near 50%.

**Change in Kids Who Watch Videos on An App or Website At Least Weekly**

<table>
<thead>
<tr>
<th>Year</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>36%</td>
<td>54%</td>
<td>76%</td>
<td></td>
</tr>
</tbody>
</table>

Tween viewership of videos is higher than that of 6-8s. At the weekly level, 78% watch videos vs. younger kids’ 73%. And more than a third of tweens watch videos several times per day (34%) compared to the 27% of kids who do the same.
YouTube rules the content land

Not coincidentally, Youtube is the #1 brand among kids ages 6-12! The video powerhouse is kids’ #1 choice for watching, and it leads all 347 cross-category brands evaluated in the BRAND LOVE® study for the second year in a row. YouTube is the most powerful brand in kids’ lives in 2017.

#1 brand among kids

While YouTube leads all networks and SVOD brands on KIDFINITY, Netflix is the #2 content provider (and #5 brand overall) among kids. YouTube bests the long-form giant by more than 25 KIDFINITY points.

YouTube is also winning with parents this year. Up 19 PARENTFINITY points to an 866, it ranks second (to Netflix) in the category among parents. Among all brands, YouTube is now the #10 brand of moms and dads, topping iconic favorites like Nike and Disney.

2017 KIDFINITY and PARENTFINITY for Network and Streaming Brands

<table>
<thead>
<tr>
<th>Brand</th>
<th>Kids</th>
<th>Parents</th>
</tr>
</thead>
<tbody>
<tr>
<td>YouTube</td>
<td>900</td>
<td>866</td>
</tr>
<tr>
<td>Netflix</td>
<td>872</td>
<td>898</td>
</tr>
<tr>
<td>Disney</td>
<td>835</td>
<td>839</td>
</tr>
<tr>
<td>nick</td>
<td>826</td>
<td>820</td>
</tr>
<tr>
<td>CN</td>
<td>818</td>
<td>759</td>
</tr>
<tr>
<td>YouTube Kids</td>
<td>800</td>
<td>767</td>
</tr>
<tr>
<td>XD</td>
<td>774</td>
<td>763</td>
</tr>
<tr>
<td>hulu</td>
<td>727</td>
<td>787</td>
</tr>
<tr>
<td>PBS 39</td>
<td>717</td>
<td>842</td>
</tr>
<tr>
<td>Animal Planet</td>
<td>705</td>
<td>798</td>
</tr>
<tr>
<td>Amazon Video</td>
<td>688</td>
<td>801</td>
</tr>
<tr>
<td>HBO Max</td>
<td>676</td>
<td>726</td>
</tr>
<tr>
<td>Family</td>
<td>644</td>
<td>750</td>
</tr>
<tr>
<td>Food</td>
<td>597</td>
<td>803</td>
</tr>
<tr>
<td>FREEFORM</td>
<td>593</td>
<td>671</td>
</tr>
<tr>
<td>ESPN</td>
<td>557</td>
<td>700</td>
</tr>
<tr>
<td>MTV</td>
<td>459</td>
<td>731</td>
</tr>
</tbody>
</table>

Base: Kids 6-12 and parents of kids 6-12
Kid love for **YouTube** is still increasing—up 31 KIDFINITY points from its debut #1 ranking in 2016.

A whopping 96% of kids ages 6-12 are now aware of **YouTube**, and 94% say they either *love* (71%) or *like* (24%) it! Its popularity also jumps in 2017 from 72% to 82% of kids who see it as *really popular* now.

With awareness, love, and popularity comes usage. In 2017, **90% of kids who know the brand currently use it**, and **83% do so daily**.

The frequency of **YouTube** engagement also continues to rise. This year, 65% of kid users engage with the app/site several times a day—up 20 percentage points since 2015.

**YouTube is changing kid culture**

Video is kids’ medium of choice, and **YouTube is the king of video**. The brand is omnipresent in kids’ lives, and the world is at their fingertips when they “YouTube it.” The portal has become their entertainment, inspiration, and information hub. It is far beyond a place to watch an unboxing video. Kids rely on it for DIYs, homework help, music videos, stunts and gaffes, challenges, branded content, life hacks, gaming tips, family vlogs, and the list goes on.

**YouTube** has created a new generation of celebrities—YouTubers who do everything from amuse viewers with “eat it or wear it” challenges, to entertain them with impressive pop star song covers, to educate them on how to survive a family vacation. Kids feel connected to these just-like-me “celebrities,” particularly ones with whom they share interests.

Kids subscribe to their channels, follow them on social media, send them messages, ‘like’ their posts, and do whatever they can to meet them in person. The celebs inspire, befriend, comfort, and connect with kids in a way celebrities of previous generations never could have imagined.
Throne of games

As mobile devices have increasingly made their way into kids’ lives, gaming has evolved. In recent years, industry pundits have purported that certain gaming platforms would be phased out or become obsolete. The reality, however, is that gaming has proliferated—expanding across devices. Additionally, game play has increased among kids, particularly since 2015. More kids are now playing on more devices than ever.

App-based gaming is the top method for play, with four in five kids (82%) doing so weekly. Among devices, kids more often play on a tablet than a phone (73% vs. 69%), likely due to the comfort of having a larger field of vision with the bigger screen.

Nearly two thirds of kids 6-12 (66%) still play on a console every week, followed closely by
website gaming (62%). Gaming on a handheld video game system is enjoyed by just over half of kids (55%), and this is likely being boosted by the recent release of Nintendo Switch.

Two new forms of gaming—virtual reality and augmented reality—are also starting to see some usage among kids. Requiring lower investment, AR is the bigger draw for more than one in four kids (29%), but VR isn’t too far behind, as 23% of kids say they play with a VR headset at least weekly.

Data shows that playing mobile and app games continues to rise among kids ages 6-12, but it’s important to note that the days of console gaming are far from over.

While kids are using handheld devices for gaming, gaming consoles are making a comeback. The warmly-welcomed Nintendo Switch has struck a chord with kids and families who appreciate the hybrid design and gameplay flexibility. Over 2.6 million systems have been sold in the US! On the heels of that success, the highly anticipated Xbox One, dubbed the “World’s Most Powerful Console” is scheduled to be released in November 2017. Additionally, rumors about Sony’s PlayStation 5 continue to circulate, but there is no confirmed launch date just yet. Bottom line: console makers are taking measures in order to stay Next-Gen relevant.

With so many evergreen brands creating new and exciting titles in 2017, it’s easy to see why the popularity of console gaming continues to build. Posting a KIDFINITY score of 768 for Mario Party and 756 for Mario Kart, it’s clear that the party rallies on for Nintendo’s beloved Mario brand. And LEGO Batman is sending up a signal to fans everywhere. With a KIDFINITY score of 748, the love for this iconic franchise heroes on!

**The Halo effect**

KIDFINITY is certainly the strongest for fun and familiar franchise console games in 2017. This year, kids show big love for Mario Party, Mario Kart, LEGO Batman, and LEGO Star Wars. These titles suggest, much like analog play, kids are drawn to character- and adventure-driven experiences.

**KIDFINITY for Select Console Games, 2017**

<table>
<thead>
<tr>
<th>Game</th>
<th>KIDFINITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mario Party</td>
<td>768</td>
</tr>
<tr>
<td>Mario Kart</td>
<td>756</td>
</tr>
<tr>
<td>LEGO Batman</td>
<td>748</td>
</tr>
<tr>
<td>LEGO Star Wars</td>
<td>748</td>
</tr>
<tr>
<td>Just Dance</td>
<td>689</td>
</tr>
<tr>
<td>Skylanders</td>
<td>681</td>
</tr>
<tr>
<td>Call of Duty</td>
<td>659</td>
</tr>
<tr>
<td>Halo</td>
<td>646</td>
</tr>
<tr>
<td>Zelda</td>
<td>636</td>
</tr>
<tr>
<td>Madden</td>
<td>603</td>
</tr>
<tr>
<td>Battlefield</td>
<td>589</td>
</tr>
<tr>
<td>NBA 2K</td>
<td>588</td>
</tr>
<tr>
<td>Star Wars</td>
<td>587</td>
</tr>
<tr>
<td>Battlefront</td>
<td>577</td>
</tr>
<tr>
<td>Overwatch</td>
<td>566</td>
</tr>
<tr>
<td>Final Fantasy</td>
<td>559</td>
</tr>
<tr>
<td>FIFA</td>
<td>543</td>
</tr>
<tr>
<td>NHL</td>
<td>516</td>
</tr>
</tbody>
</table>

Base: Kids 6-12  Values in red/green represent change since 2016

**Game on**

Legends of Zelda

- LEGO Batman
- LEGO Star Wars
- Mario Kart
- Mario Party

**KIDFINITY** is the score for fun and familiar franchise console games in 2017. This year, kids show big love for Mario Party, Mario Kart, LEGO Batman, and LEGO Star Wars. These titles suggest, much like analog play, kids are drawn to character- and adventure-driven experiences.
We are in the midst of a digital revolution, and kids are at the center of this transformation. As innovation continues to speed ahead, expect to see these trends roll forth in the next 12-24 months:

• **THE NEW CONTENT BATTLEGROUND** New content platforms are popping up every day. From Disney’s new SVOD service to YouTube TV to Snapchat's foray into longform production, kids’ viewing will become more modular across countless short- and long-form content providers.

• **AUDIENCE PLAY** YouTube and the ubiquity of video is inspiring real world play patterns like Audience Play. As more kids live out their everyday lives as if they have an audience, expect to see more YouTube- and Snapchat-derived behaviors.

• **VICARIOUS CONSUMPTION** Kids get satisfaction out of watching others shop for, unbox, and engage with products. To some degree, the novelty has worn off by the time a product moves from the screen to a kid’s hand. Marketers will need to deepen the brand connection to keep kids engaged.

• **DIGITAL HIEROGLYPHICS** As images, icons, memes, emojis and Bitmojis become more sophisticated and personalized, kids’ digital communication will become a language of its own, sans text.

• **THE BOT BOOM** Current and forthcoming AI agents and playthings will evolve to better cater to kids’ speech and play patterns while experts, parents, and kids navigate the new “hear-and-now.”
SMARTY PANTS® is an award-winning, CASRO-certified, market research consultancy. The woman-owned firm provides best-in-class qualitative and quantitative research and strategic consulting to corporations, agencies and not-for-profit organizations around the globe. The Smarty Pants team of research and strategy experts excels at gathering youth and family insights and helping clients translate those insights into smarter products, programs, and communications.

Based in Tennessee, the company has offices in New York, Boston, San Diego, Tampa, Myrtle Beach, London, Prague, Shanghai and Mexico City.

For more information
203.847.5766
www.askSmartyPants.com