



INTRODUCTION

Screen Scape focuses on children's favourite on-screen content across all media they have access to.

Every 12 Months, Kids Insights survey 21,300 kids to give an unrivalled viewpoint into the world of kids, tweens and teens. As of January 2019, we have started collecting data on three year old children.

Screen Scape is predominantly based on the results of surveying 5,235 children between January 1st and March 31st 2019, though also utilises data we have collected since May 2017.

In our last report, we identified that Netflix had overtaken YouTube to become the most commonly used video platform. This trend has continued this quarter, with 37% more younger viewers (4-12s) watching Netflix than they were last quarter.



This report was produced exclusively for The Insights People and is for their internal use only



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KEY FINDINGS

Interactive TV to help create engagement (Part I)

Children are facing competing demands for their attention. TV and entertainment must find a way to cut through.

For children up to the age of twelve, 61% (107 hours) of their time is spent sleeping, eating, doing chores, at school or on homework – leaving just 39% of their time for anything else.

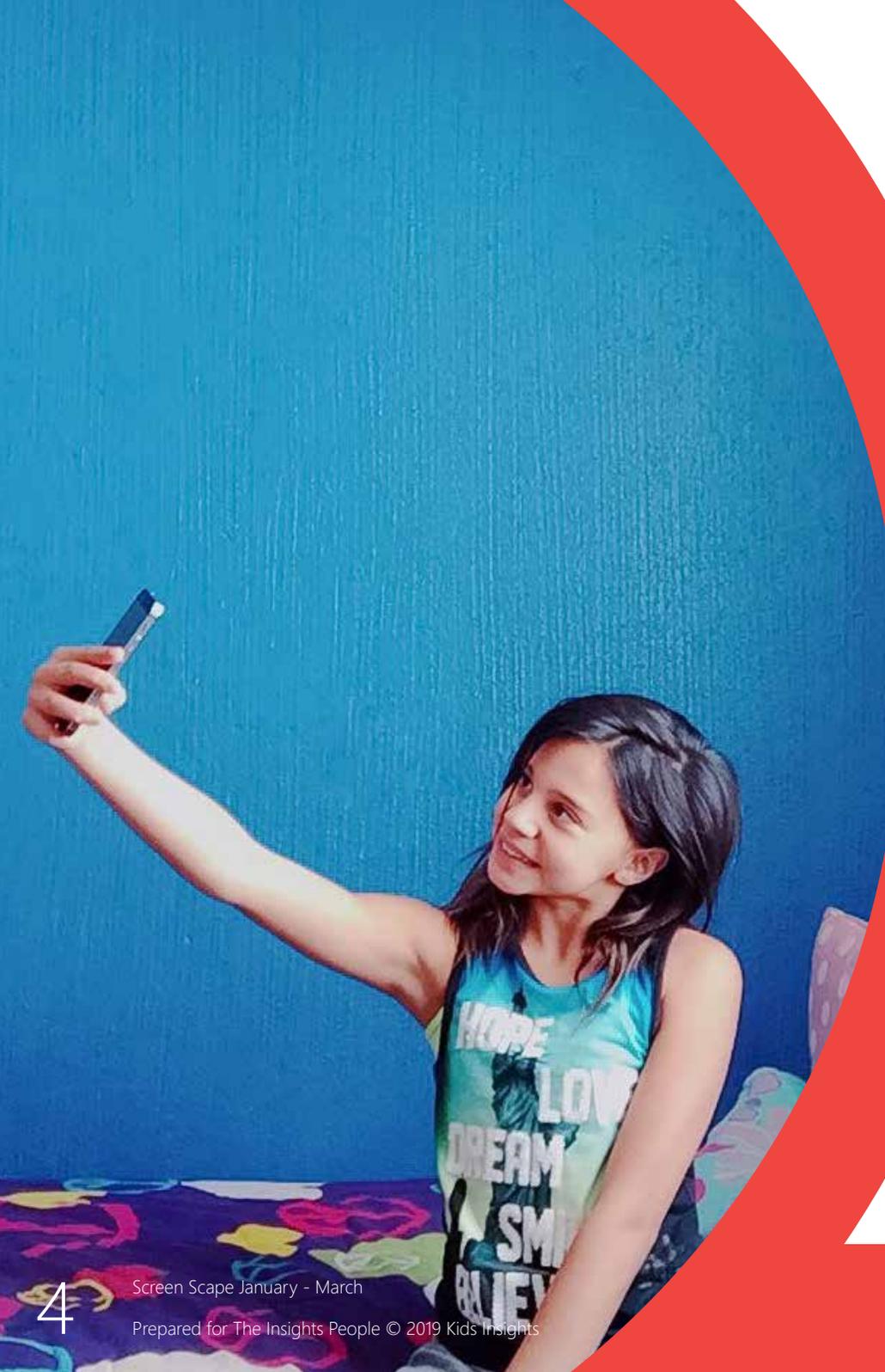
Being active (playing sports or outside in general) and hanging out with friends take up another 16 hours, leaving 30% (53 hours) for leisure and entertainment activities.

This remaining leisure time is split between digital and non-screen activities. A total of 29 hours per week are spent playing with toys & games, reading, arts & crafts, music and shopping – leaving 24 hours per week for digital entertainment. Video games, social media and account for 14 of these 24 hours, leaving 10 hours per week for TV.

This time is split further, when we consider how fragmented the viewing landscape is, as our latest data shows that 6 in 10 kids watch Netflix and 3 in 10 watch Amazon Prime Video.

To complicate matters further for broadcaster and producers, 9 in 10 young children multi-task when watching TV, including half who play with toys and 3 in 10 using a tablet.

Could interactive TV (see next page) be a unique way to enhance engagement with young viewers?



KEY FINDINGS

Interactive TV to help create engagement (Part II)

As predicted in our Future Forecast reports, interactive content is providing conventional with new ways to engage viewers.

With family time becoming increasingly precious, parents are faced more content options to engage with than ever before. Therefore brands, technology developers and creators must create memorable experiences for children.

Netflix is experimenting with the format, following the success of their choose-your-own-story Black Mirror episode, the platform is applying the engaging format to a lighter and more educational show, You vs. Wild with Bear Grylls.

Suitable for younger audiences, viewers are put in his shoes as he tackles the wilderness and decide on the course of action he takes.

Benefits to producers to utilising this format include the fact viewers must pay more attention to what their watching, in order to make decisions – reducing the possibility of second screening on either tablets or mobiles.

Furthermore, the content also has a great replay-ability, thanks to the different pathways children can take.



KEY FINDINGS

YouTube still declining as Netflix builds lead

In our last report, we identified that Netflix had overtaken YouTube to become the most commonly used video platform. This trend has continued this quarter, with 37% more younger viewers (4-12s) watching Netflix than they were last quarter.

Not only is Netflix increasing, but YouTube is reducing. In many ways YouTube is the nucleus of the kids' ecosystem. It is the platform on which children tend to congregate – from learning how to crack a computer game level, honing their football skills or watching the latest film trailer – YouTube has it all in abundance.

But in recent years, YouTube and device manufacturers have become under increased pressure to protect children from over exposure to YouTube content, and as such device manufacturers have developed their technology to make it harder for children to binge watch. There are other factors to consider in reviewing why YouTube may start to plateau.

Ten years ago, there was a fairly limited choice of social media, with each platform having its own niche.

Fast forward to 2019, and there is not only more social media platforms on offer, but the identifying USPs between each platforms have become increasingly blurred, as they quickly adopt each other's technologies.



KEY FINDINGS

Attendance holds during quiet season

74% of children went to the movies between January 1st and March 31st. This was lower than the 79% who visited in the previous quarter, but is still strong for a typically quiet period for the cinema.

The Jan – March period follows the busy holiday season at the cinema, where big budget and critically acclaimed films are released. The period also coincides with a period where families are cutting back spending, post-holidays.

Children in the UK get an average (median) of £20 every month in disposable income to spend as they wish. Going to the movies is the 8th most common category that children aged 10-15 chose to spend their money on, with 55% saying they spend their own money on going to the cinema.

Cinema attendance over the upcoming Q2 2019 was already boosted by the release of Avengers: Endgame, the 22nd and final title in the Marvel Cinematic Universe current series which has generated more than \$18bn to date.

The film made over \$350m at its opening weekend, setting new box office records. It is currently the most anticipated movie with children of all ages in our data, and when tickets went on sale, every major ticketing website crashed under demand earlier this year.





Big brands shine through in fragmented space

For the first time in history, more households in the UK have access to the internet than a television set as children are faced with more content than ever before.

The use of streaming services and technology is high with children under the age of 9 (54% use Netflix), but watching traditional TV is as popular, with 43% of children having Sky TV in the home and 40% watching Cbeebies.

This quarter, for the first time, we have data on 3 year olds. Paw Patrol is the overwhelming favourite of boys – with 42% of all 3 year old boys in the UK reporting it's one of their favourites. Peppa Pig, Fireman Sam, PJ Masks and Blaze and Monster Machines, a show with a strong STEM element make up the remaining top 5.

For girls aged 3, Peppa Pig is the favourite of 31% of children followed by Paw Patrol, Ben & Holly's Little Kingdom, Bing and Hey Duggee.

LEGO Ninjago, which has just released season 10 – has jumped into second place with 4-6s boys (+70% increase) and into first place with older boys 7-9. With girls age 7-9, the Miraculous Ladybug is the new 5th favourite show.

Favourite Shows (Age 3-6)

Boys	
TV Show	% Fav
Paw Patrol	26.0%
PJ Masks	13.4%
Blaze and the Monster M...	12.6%
Peppa Pig	12.6%
LEGO Ninjago	12.2%
Mr Bean (animated series)	8.7%
Scooby Doo	8.7%
Horrid Henry	8.3%
Fireman Sam	6.7%
Pokemon	6.7%

Girls	
TV Show	% Fav
Peppa Pig	22.0%
Paw Patrol	17.6%
My Little Pony	13.7%
Disney (all other shows)	11.9%
Shimmer and Shine	11.0%
Horrid Henry	10.6%
Mr Bean (animated series)	9.3%
PJ Masks	8.8%
Ben & Holly's Little King...	7.9%
Vampirina	7.9%

Favourite Shows (Age 7-9)

Boys	
TV Show	% Fav
LEGO Ninjago	16.5%
Horrid Henry	11.9%
Football	11.0%
Mr Bean (animated series)	10.6%
Pokemon	8.9%
The Simpsons	8.5%
Spongebob	6.8%
Horrible Histories	6.4%
The Flash	6.4%
Top Gear	6.4%

Girls	
TV Show	% Fav
My Little Pony	13.4%
Strictly Come Dancing	10.8%
Horrid Henry	10.3%
The Simpsons	9.8%
Miraculous Ladybug	8.2%
X Factor	8.2%
Britain's Got Talent	7.7%
Horrible Histories	7.7%
Barbie Dreamhouse Adv...	7.2%
Mr Bean (animated series)	7.2%

CONTEXT

Blaze and the Monster Machines is the Nickelodeon show based around STEM.

Increasingly popular Miraculous: Tales of Ladybug and Cat Noir is currently on its third season, with seasons 4 and 5 already in production.



Finding the time for TV

Teenagers spend most of their waking hours (outside of school) online & on social media – spending 594.1 hours per year. Following that, they spend 540.7 hours watching TV. Teens also spend 512 hours per year studying and 499.8 hours playing either video games or apps.

It's at age 10 where live TV and competition shows begin to cut through in a fragmented space, including Ant & Dec, Britain's Got Talent, X Factor, Strictly Come Dancing and live football.

But it's at this age where children start to develop their own personal tastes and interests, which their viewing habits form around. Looking beyond the flagship live TV shows that tweens and teens enjoy reveals their changing and fragmenting viewing habits.

New shows that teenagers have started watching this quarter include, Riverdale (Netflix), The Umbrella Academy (a superhero show on Netflix), Sex Education (Netflix), Game of Thrones (HBO, aired on Sky), Luther (BBC), The Good Place (Netflix), Afterlife (Netflix) and The Grand Tour (Amazon).

Favourite Shows (Age 10-12)

Boys	
TV Show	% Fav
Football	13.9%
The Simpsons	11.4%
Ant & Dec's Saturday Ni...	10.5%
LEGO Ninjago	10.1%
Britain's Got Talent	9.3%
X Factor	8.0%
Scooby Doo	7.6%
Mr Bean (animated series)	5.9%
The Big Bang Theory	5.9%
Tom and Jerry	5.9%

Girls	
TV Show	% Fav
X Factor	14.9%
Britain's Got Talent	14.5%
Strictly Come Dancing	9.0%
The Simpsons	9.0%
The Great British Bake Off	8.6%
Ant & Dec's Saturday Ni...	7.2%
EastEnders	6.8%
Doctor Who	6.3%
The Big Bang Theory	6.3%
Sam and Cat	5.9%

Favourite Shows (Age 13-18)

Boys	
TV Show	% Fav
Football	13.1%
Doctor Who	8.6%
The Simpsons	8.4%
The Big Bang Theory	8.1%
Top Gear	7.9%
Family Guy	6.2%
I'm A Celebrity Get Me O...	6.2%
Game of Thrones	6.0%
The Walking Dead	5.7%
Marvel's Agents of SHIELD	5.0%

Girls	
TV Show	% Fav
I'm A Celebrity Get Me O...	7.5%
Stranger Things	6.1%
Ant & Dec's Saturday Ni...	5.3%
Love Island	5.1%
Britain's Got Talent	4.9%
Friends	4.9%
EastEnders	4.7%
Riverdale	4.7%
Hollyoaks	4.5%
Pretty Little Liars	4.5%

CONTEXT

Netflix recently stated that its biggest competitor was not a TV brand - such as HBO or Amazon - but Fortnite.



Merchandise begins to recover in 2019

Licensed products related to TV declined sharply throughout 2018, with categories such as clothing (24% reduction), books (16% reduction) and toys (13% reduction) not faring well with 9-12s, the biggest owners of licensed products.

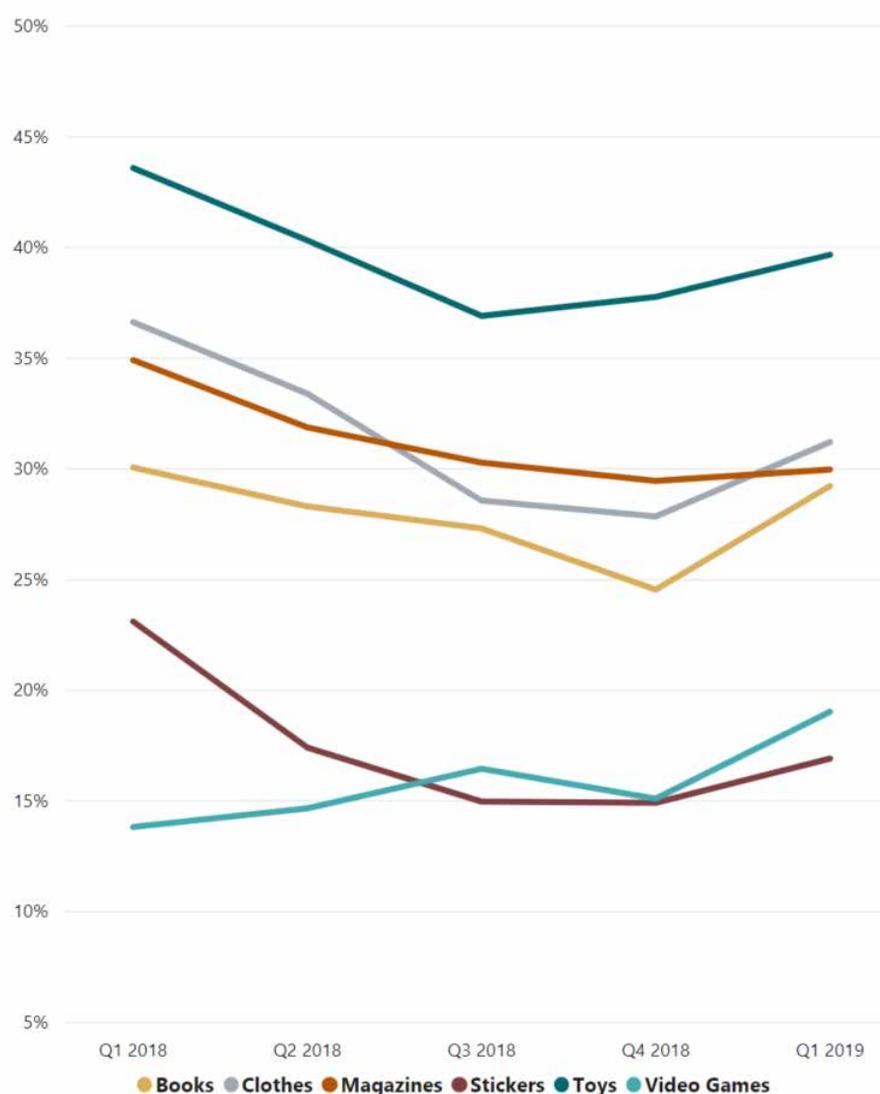
But during Q1 2019, there was a noticeable uptick, with books showing the biggest increase post-Christmas, rising from 25% to 29%.

Kids aged 4-12 who keep up to date and follow their favourite shows on YouTube are 18% more likely than the average child to purchase licensed toys.

MGA Entertainment is expanding its original LOL Surprise digital content beyond YouTube to a number of global OTT channels.

The brand will be sharing three seasons 'Unboxed' and also behind the scenes footage, which will be available on OTT platforms weekly. MGA Entertainment has just broken through the 1 million subscriber mark on YouTube.

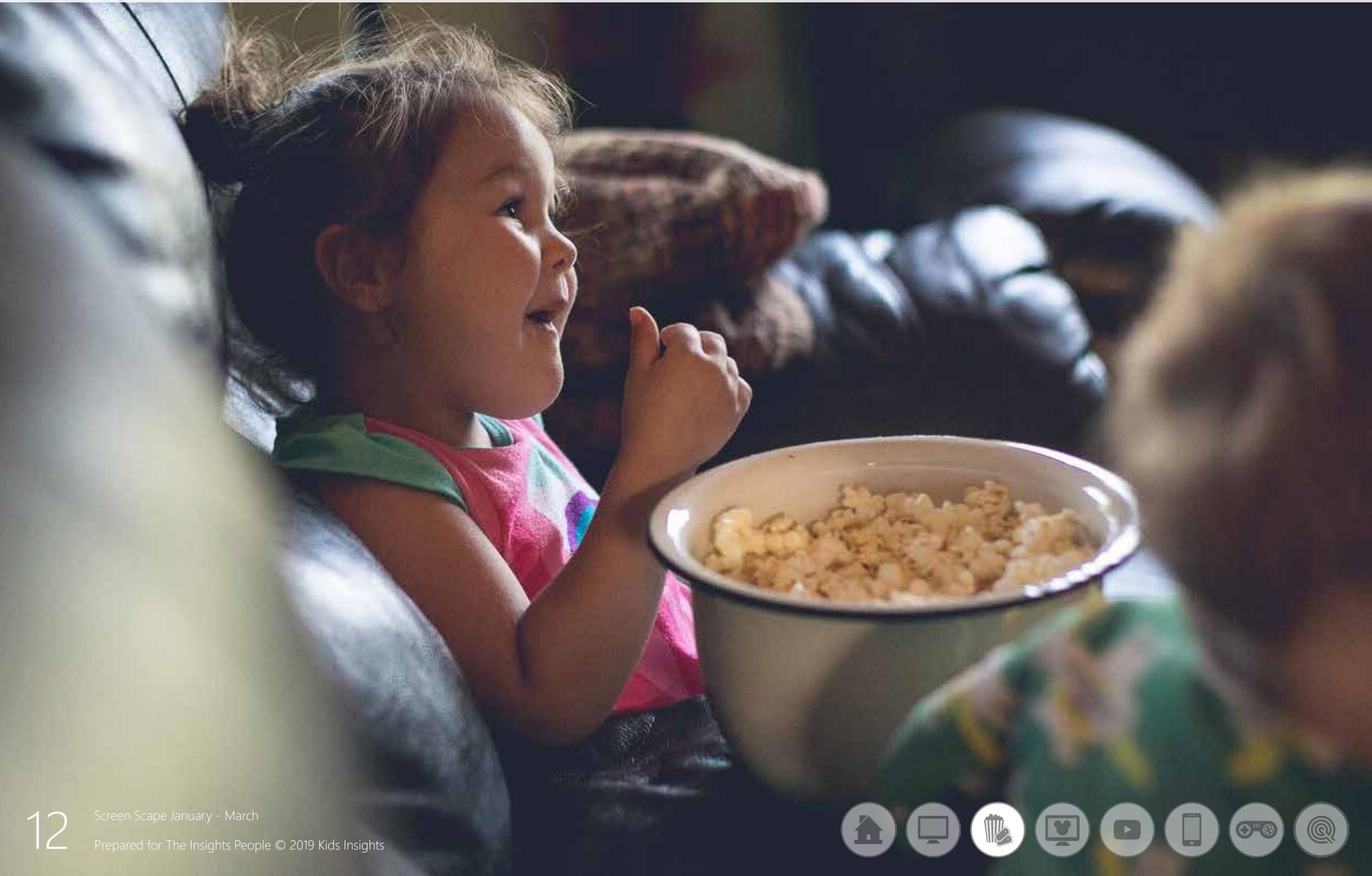
Purchases bought related to favourite TV Show (4-9s)



COMMENT

Internet stars such as Ryan ToysReview are crossing over into publishing, licensing, merchandising, toys and even linear TV spaces.

From next quarter, we will have data and insights on children's behaviour around the purchase of licensed products related to TV.



Good quarter for cinema

Over the period January – March 2019, 75% of kids say they went to the cinema at least once, which is higher than the 69% who went in the comparable quarter last year. This is a strong performance for the traditionally quiet time of year at the cinema.

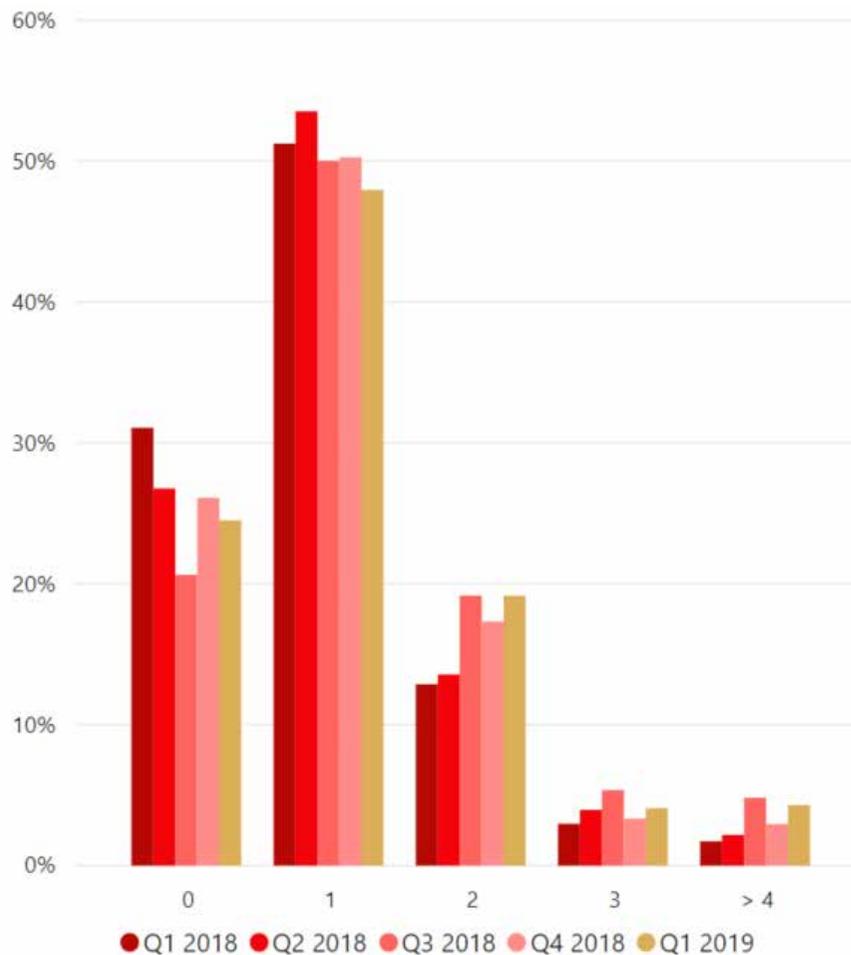
Mary Poppins Returns, LEGO Movie 2, Aquaman and Bumblebee were all popular releases in the cinema this quarter.

Attendance over Q2 2019 will be boosted even further, with the highly anticipated release of Avengers: Endgame – the most anticipated film with children this quarter.

The 22nd and final instalment in Marvel's current Avengers franchise is expected to break all box office records.

It's not until age 15 that children are more likely to attend the cinema with friends than family. Although, even at age 16-18, a quarter of children visit the cinema with their family.

How often have you visited the cinema this month?



CONTEXT

Although children aged four to six visit the cinema the least, they are the category most likely to purchase books, clothes, stickers and toys related to their favourite films.

It can be difficult for young children and families to make a trip to the cinema, so to attract the next generation of cinema-goers, cinemas are making a push towards kid-friendly auditoriums. Cinopolis Junior in the US is trying to attract more families with an 'in-theater playground' concept for children.

Mary Poppins beats LEGO to top spot

The 2018 sequel to the 1964 Disney classic Mary Poppins was the most watched film over the quarter, while DC's (Warner Bros) Aquaman also performed well.

Despite consistent viewers across age ranges, The Lego Movie 2: The Second Part didn't manage to follow up the success of its predecessor.

The movie was well received critically, but earned considerably less than its original at the box office. This is likely due the volume of other 'LEGO' movies and content over the last few years – including Batman and Ninjago, but also many more shows and movies released on DVD and OTT platforms.

How To Train Your Dragon: The Hidden World also appealed to all ages, and had the best opening of the three films.

Girls aged 4-6 and boys aged 13-15 were the biggest fans of Captain Marvel, the latest instalment of the Marvel Cinematic Universe and first with a female solo lead. She is set to feature heavily in Avengers: Endgame later in April.

What films have you watched at the cinema recently?

Films Watched (3-12)	
Film	%Went
Mary Poppins Returns	19%
The Lego Movie 2: The ...	13%
Aquaman	11%
Bumblebee	11%
How to Train Your Drag...	10%
Wreck-it Ralph 2	6%
None of These	5%
Spider-Man: Into The S...	5%
The Kid Who Would Be ...	5%
Stan & Ollie	4%

Films Watched (13-18)	
Film	%Went
Mary Poppins Returns	16%
Aquaman	13%
Bumblebee	8%
The Lego Movie 2: The ...	7%
How to Train Your Drag...	6%
None of These	6%
Glass	6%
Instant Family	6%
Fantastic Beasts: The Cri...	5%
King of Thieves	5%

CONTEXT

Star Wars released a trailer for Episode IX in April (film due for release 2019), which quickly went viral.

Could the future of the franchise be on the small screen? With general consumers taste shifting towards streaming TV (thanks to the huge success of shows like Game of Thrones) and with Disney set to launch their OTT service in November, Star Wars could find a new home there.



The power of superheroes

Following the film's release in mid December, Aquaman appears as the 7th favourite character for girls. Actor Jason Momoa appears on the boys' favourite celebrity list (29th), and not the girls' list.

Marvel characters make up 5 of teen boys favourite characters, with DC superheros making up a further two, to mean that 70% of their top favourite characters are from these two franchises.

Gaming characters Pikachu (3rd), Mario (17th) and Sonic (24th) all appear in the top 30 for boys age 3-12, but Pikachu is the only one of these characters to appear this highly ranked (10th) for girls the same age. The Detective Pikachu movie is due to be released in May.

For teenage girls, Belle (Beauty and the Beast) has increased in popularity from 10th favourite character in Q4 2018 to 2nd place now. Emma Watson, who portrayed Belle in the 2017 live-action release of the film, retains her position as second favourite famous person this quarter.

Favourite Characters

Boys 3-12	
Character	% Fav
Spiderman	9%
LEGO Batman	7%
Pikachu	5%
Harry Potter	5%
Captain America	4%
Mr bean	4%
Batman	4%
Ninja (LEGO Ninjago)	3%
Minions	3%
Thor	3%

Boys 13-18	
Character	% Fav
Captain America	7%
The Doctor (Doctor Who)	6%
Harry Potter	5%
Sheldon (The Big Bang T...)	4%
Spiderman	4%
Thor	4%
Mr bean	4%
Batman	3%
Luke Skywalker	3%
Mario (Super Mario)	3%

Girls 3-12	
Character	% Fav
Elsa (Frozen)	7%
Harry Potter	7%
Mr bean	5%
Mary Poppins	4%
Peppa Pig	4%
Barbie	4%
Hermione Granger	4%
Anna (Frozen)	3%
Moana	3%
Pikachu	3%

Girls 13-18	
Character	% Fav
Harry Potter	8%
Belle (Beauty and the Be...)	3%
Eleven (Stranger Things)	3%
Mr bean	3%
Minions	3%
Wonder Woman	2%
Aquaman	2%
Hermione Granger	2%
Bart Simpson	2%
Katniss Everdeen	2%

IN FOCUS

For boys 13-18, Captain America has climbed from 12th up to 1st place.

Rising Stars

Children mentioned almost 300 unique answers this quarter, in response to 'Who is your favourite famous person?', showing the fragmentation of interests.

In our Q4 2018 Leisure Measure report, we highlighted Billie Eilish rising through the rankings of favourite music artist for 16-18s (reaching 5th, now 3rd), and the singer is now ranked as the 3rd most popular famous person for girls age 16-18. Her debut album was released at the end of March, and topped the UK album chart in its first week.

Footballers Mohamed Salah, Lionel Messi, Cristiano Ronaldo and Harry Kane all appear as some of boys favourite celebrities. Liverpool star Mohammed Salah was recently named as one of TIME 100's cover stars, a profile which he used to stress the importance of gender equality.

This quarter, Ariana Grande has entered the top 10 for boys age 13-18, meaning she's now a top ranked celebrity in three out of 4 of our groups. She's ranked 6th for this group, one place ahead of Sir David Attenborough - who is narrating a new Netflix documentary called 'Our Planet' released at the start of April.

Favourite Famous Person

Boys 3-12	
Person	% Fav
Spider-Man	2%
Cristiano Ronaldo	2%
Batman	2%
DanTDM	2%
Lewis Hamilton	2%
Harry Kane	2%
Dad	1%
David Beckham	1%
Harry Potter	1%
Mum	1%

Boys 13-18	
Person	% Fav
Lionel Messi	2%
David Beckham	2%
Chris Hemsworth	1%
David Tennant	1%
Will Smith	1%
Ariana Grande	1%
David Attenborough	1%
Mohamed Salah	1%
Tom Cruise	1%
Tom Holland	1%

Girls 3-12	
Person	% Fav
Ariana Grande	4%
The Queen	3%
JoJo Siwa	2%
Mr bean	2%
Elsa (Frozen)	2%
Mum	2%
Little Mix	1%
Harry Potter	1%
Taylor Swift	1%
Dua lipa	1%

Girls 13-18	
Person	% Fav
Ariana Grande	3%
Emma Watson	2%
Cardi B	1%
Shakira	1%
Ed Sheeran	1%
Shane Dawson	1%
Barack Obama	1%
Billie Eilish	1%
Joe Sugg	1%
Ryan Reynolds	1%

CONTEXT

Lewis Hamilton is another active sportsperson in the favourite lists, rising from 8th most popular with young boys last quarter, to 5th now.



YouTube continues to slide

Less children aged 4-12 are reporting they watch YouTube this quarter, a trend that continues since the beginning of 2018. 44% now watch it, compared to 54% 12 months ago.

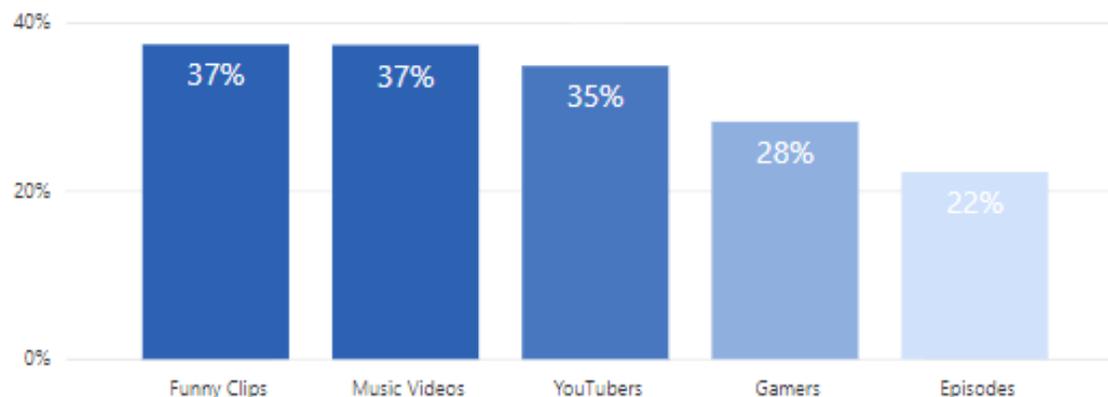
At the same time, the number of kids this age who watch Netflix has increased from 41% to 57%.

Teenagers are watching YouTube in shorter session times. In the last six months, the number of 13-18 year olds spending more than an hour at a time on YouTube has reduced by 16%, from 31% to 26%.

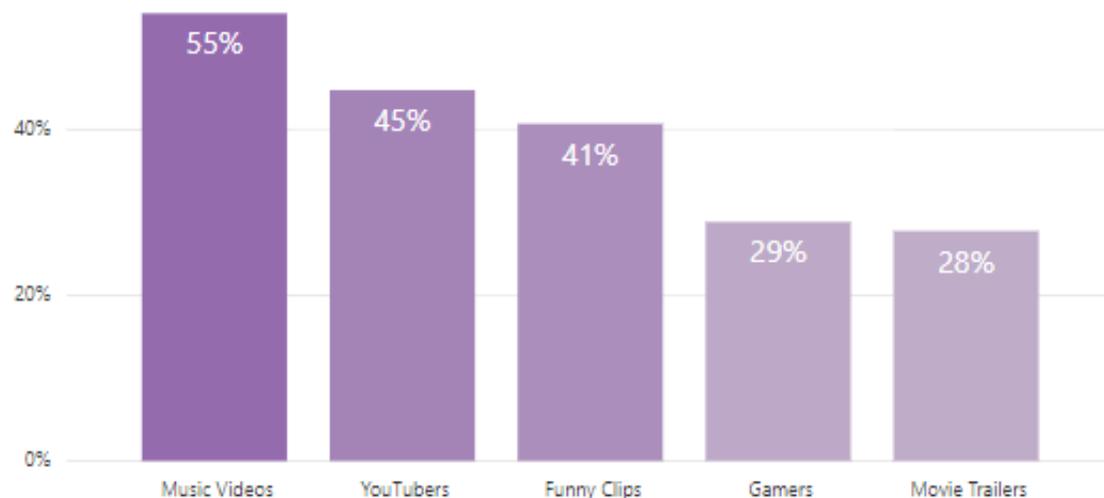
Music videos remain the most popular type of video to watch for teenagers (55%) and these videos have increased in popularity for 4-12s since last quarter (from 34% in Q4 2018 to 37% now).

YouTube is the most popular platform for 4-12s to listen to music on (53%, ahead of Spotify with 22%), and those who mainly watch music videos when they're on YouTube are 44% more likely to say Ariana Grande is their favourite artist (5.2%, compared to 3.6% average). Ariana Grande topped YouTube Premiere viewing figures in November - but she's recently been beaten by K-pop band Blackpink.

Top 5 types of video watched on YouTube (3-12)



Top 5 types of video watched on YouTube (13-18)



IN FOCUS

For 4-12 year olds, YouTube Live has more than doubled in popularity since this time last year, rising from 5% in Q1 2018 to 11% now.

Parents take control

The number of teenagers who are always monitored by their parents while they watch YouTube has seen an increase of 85% in the last 12 months (from 13% in Q1 2018 to 24% now).

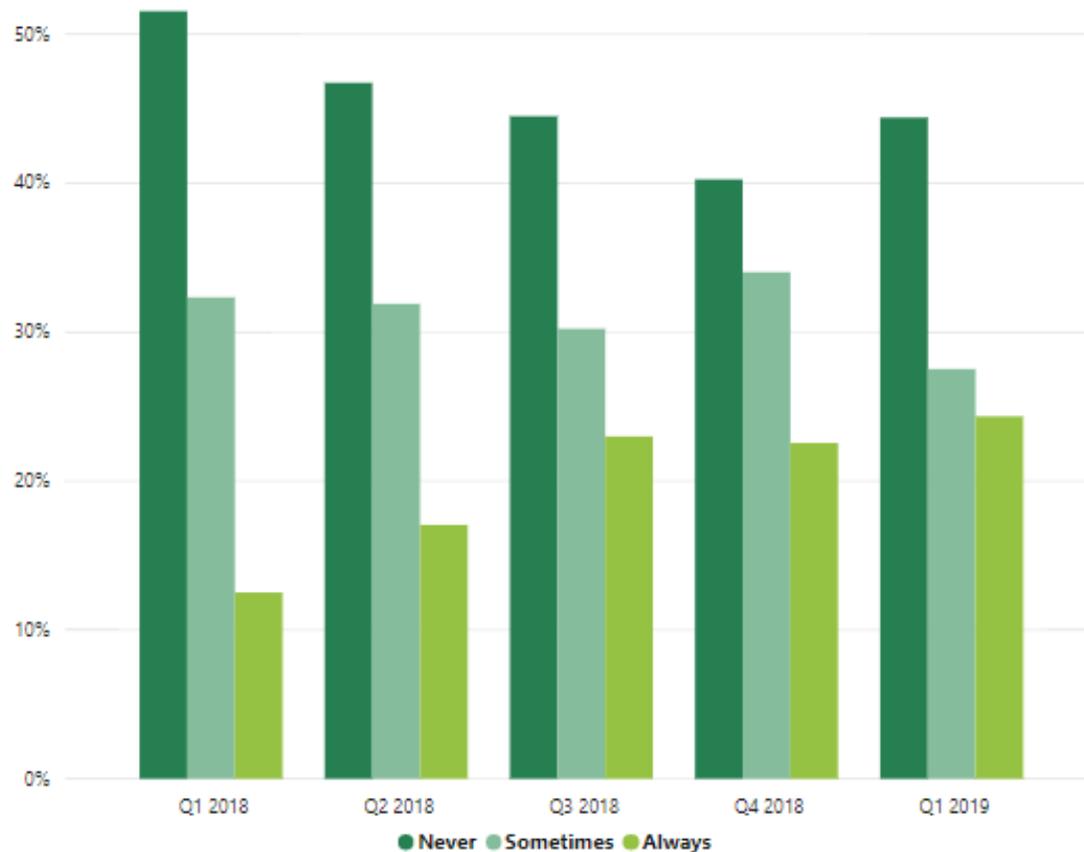
At the same time, the number of teens who are never monitored has decreased (from 52% to 44%).

61% of younger audiences (4-12s) are now always monitored by their parents while on the platform. This is the highest score ever seen in our data, and indicates parents are becoming more vigilant about leaving their children unsupervised online.

Google and Apple have strengthened screen-control abilities over 2018, enabling parents to easily restrict and monitor screen time on certain apps.

YouTube will no longer allow the majority of channels featuring kids to include comment sections following a controversy over predatory comments being posted on videos of children. The move was in response to brands pulling advertising from the platform.

Do your parents monitor what you watch on YouTube? (13-18)



IN FOCUS

34% of children now say Netflix is their favourite video platform, compared to 24% who say YouTube.

Just a year ago, the result was entirely the opposite - 39% said YouTube, compared to 24% Netflix.

Gaming & lifestyle content wins

Just for Laughs Gags is a prank channel, and a new favourite of 4-6-year-olds.

Daily family vlog channel Family Fun Time is in the top ten for girls 7-9. They also like Ice Poseidon, a travel vlogger and livestreamer. Boys of this age list Tekkerz Kid, a YouTuber who posts mainly football related content, as well as Mo Vlogs as new favourites.

Girls aged 10-12 show a preference for arts and crafts YouTubers, such as sister Taylor & Vanessa (internet challenges and DIY slime) and Wengie (DIY tutorials and simple experiments). Both channels are now as popular as CookieSwirlC and Joe Sugg - long-time favourites of tween girls.

F2Freestylers is a new entrant to 13-15-year-old boys' favourite YouTube channels. It uploads football tutorials and sketches.

16-18-year-old boys' top choices include music YouTuber Andrew Huang, and Criken2, whose channel is mainly videos about niche video games. Girls of this age list David Dobrik, an ex-Viner who uploads vlogs of his large group of ex-Viner friends, as a favourite as well. Saffron Barker is a British lifestyle and fashion vlogger, who has become more popular with older teen girls.

Who is your favourite YouTuber?

Boys 3-12	
YouTuber	% Fav
DanTDM	6.7%
Ryan ToysReview	2.1%
Ali-A	1.1%
Zoella	1.1%
Pewdiepie	0.8%
Ryan toys review	0.8%
Morgz	0.7%
Ninja	0.6%
Disney	0.4%
Jelly	0.4%

Boys 13-18	
YouTuber	% Fav
Pewdiepie	5.5%
Ksi	2.6%
DanTDM	1.9%
Joe sugg	1.9%
Jacksepticeye	0.7%
Music	0.7%
VanossGaming	0.7%
Ali-A	0.5%
TGFbro	0.5%
Zoella	0.5%

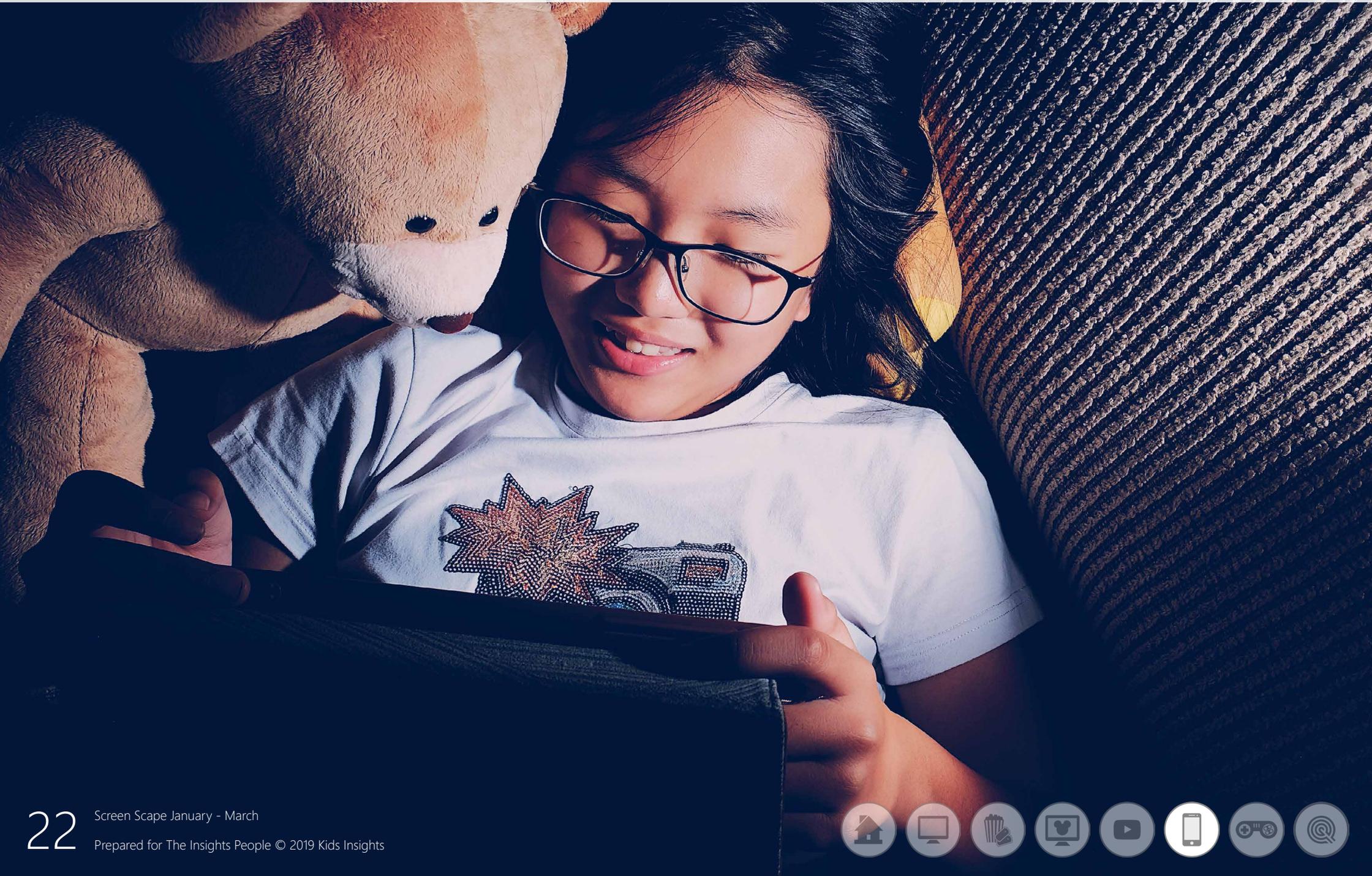
Girls 3-12	
YouTuber	% Fav
Zoella	4.7%
DanTDM	3.0%
Ryan ToysReview	1.9%
Cookie Swirl C	1.6%
Pewdiepie	1.6%
Joe sugg	0.9%
JoJo Siwa	0.8%
Tiana	0.8%
Miranda sings	0.6%
The ace family	0.6%

Girls 13-18	
YouTuber	% Fav
Zoella	6.1%
Shane Dawson	4.1%
Joe sugg	3.4%
Pewdiepie	2.0%
YouTube Red	1.8%
David Dobrik	1.4%
James Charles	1.2%
Ksi	1.2%
Jeffree Star	1.0%
Saffron Barker	1.0%

IN FOCUS

DanTDM continues to be a top choice for under-12s, especially boys 10-12.

He recently announced a UK tour over summer, where he will present The Contest: An Interactive Gaming Experience.



App spending up

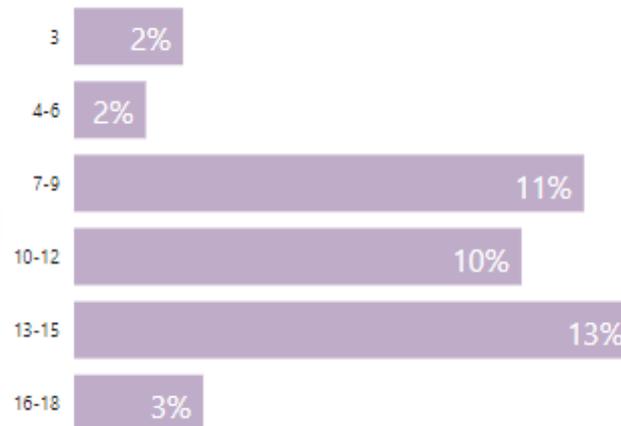
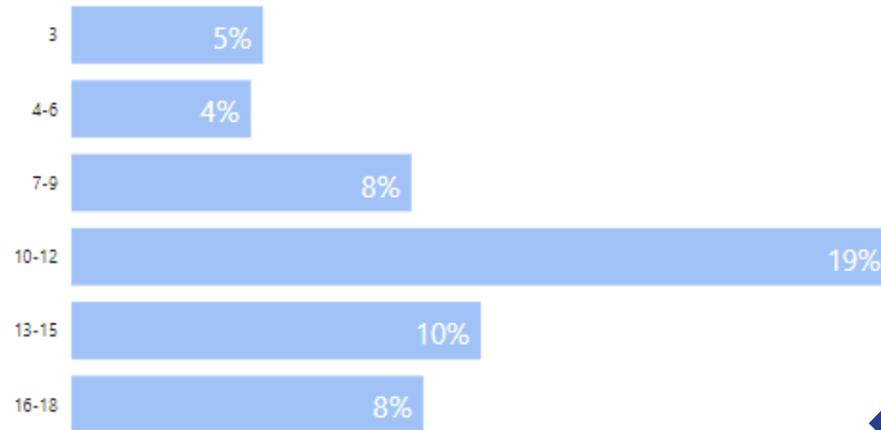
6% of 4-18s downloaded over 5 apps this quarter, increasing from 4% this time last year.

Teenagers (13-18) who only downloaded 1 app in the last month are most likely to have downloaded practical apps like Twitter (4.1%), Gumtree (2.5%), or the Amazon app (1.6%). Those who downloaded more than one app are 32% more likely than average to have downloaded a game (2.5% compared to 1.9%).

The number of 4-12 year olds downloading paid-for apps, or making in-app purchases, has increased from 69% last quarter to 72% now. 10 to 12 year olds are the most likely age group to be spending in excess of £5 on apps every month (9%), peaking at 12% for boys this age.

Depop - a free second-hand clothing marketplace app - is the most popular app to have been downloaded this quarter for teenagers choosing only free apps. Depop occasionally holds pop-up swap shop events in major UK cities, engaging their target audience offline as well as through their app.

Over £2 per month spent on apps (including in-app purchases) by age



CONTEXT

Despite its popularity, Fortnite is not available on either Steam or the Google Play Store.

Gamers must instead download the game via Epic (Fortnite's owner) software. The developer is increasingly looking to cross-sell some of its other titles, as it seeks to compete with Steam and Google.

Gaming and social media dominate

Apps which have video game counterparts are doing well this quarter. Fortnite Mobile is favourite of kids 7-9, and girls of this age list Roblox as their top choice. Roblox also appeared in the top tens of boys age 10-12. The emergence of Roblox mirrors trends seen in video games, after its popularisation by YouTubers.

Another app with building and creation as the main theme is LEGO Life, a new favourite of boys 4-6 and girls 7-9. Crayola's Create and Play app is one of girls' age 4-6 favourite apps.

There was a resurgence in kids ages 4-6 and 13-15 who considered Pokémon Go to be their favourite app, likely fuelled by the upcoming Pokémon: Detective Pikachu movie, and new Pokémon games being released for the Nintendo Switch later this year. It is also the only game app that appears in the favourites of 13-15-year-olds; this used to be Candy Crush.

Games phase out almost entirely from the favourites of 16-18s, only Fortnite Mobile appears for boys, and Angry Birds dropped from girls' top choices since last quarter.

Favourites Apps

Favourite App (3-6)	
Application	% Fav
YouTube	6%
YouTube Kids	5%
Cbeebies Playtime Island	2%
Netflix	2%
LEGO Junior	1%
Disney Life	1%
Pokemon GO	1%
WhatsApp	1%
Snapchat	1%
World of Peppa Pig	1%

Favourite App (7-9)	
Application	% Fav
YouTube	6%
Roblox	4%
Netflix	3%
Minecraft	3%
YouTube Kids	2%
Fortnite mobile	2%
WhatsApp	1%
Amazon	1%
LEGO Life	1%
YouTube Music	1%

Favourite App (10-12)	
Application	% Fav
YouTube	10%
Netflix	5%
WhatsApp	5%
Instagram	3%
Roblox	3%
TikTok	2%
YouTube Kids	2%
Snapchat	2%
Amazon	2%
Fortnite mobile	2%

Favourite App (13-18)	
Application	% Fav
YouTube	11%
Snapchat	7%
Instagram	7%
Netflix	5%
WhatsApp	4%
Facebook	3%
Spotify	3%
Facebook Messenger	2%
Amazon	1%
YouTube Music	1%

CONTEXT

Pokémon Go developer, Niantic, is set to release a Harry Potter themed version of the location-based AR app in the coming months.





Roblox closes in on Minecraft

Online multiplayer game creation platform Roblox has had a resurgence with under-12s. It was initially released in 2005 but has recently been popularised by YouTubers like Denis and CookieSwirlC.

Consequently, 5% of 4-6-year-olds, 13% of 7-9-year-olds, and 9% of 10-12-year-olds said it was their favourite game. Minecraft is maintaining its popularity across all age ranges.

FIFA dropped out of the top ten for 4-6-year olds, whereas app Super Mario Run entered it. Nintendo used the app to promote the release of their Switch game, New Super Mario Bros. U Deluxe, by giving users free in-app items.

Since last quarter, Pokémon games have become a new favourite of 7-9-year-old girls. Pokémon Sword and Shield are the latest instalments of the franchise, being released later in 2019.

Cars are a feature of 10-12-year-old boys' top games. Vehicular football game Rocket League and F1 racing games were popular.

Fortnite showed a slight decline since last quarter for girls in this age range.

Favourite Video Game

Age 3-6		Age 7-9	
Game	% Fav	Game	% Fav
CBeebies/CBBC Games	11%	Minecraft	18%
LEGO video games (all se...)	8%	Roblox	13%
Angry Birds (all series)	7%	Fortnite Battle Royale	12%
Mario Kart (all series)	6%	LEGO video games (all se...)	9%
Candy Crush (all series)	6%	FIFA (all series)	7%
Minecraft	6%	Mario Kart (all series)	7%
Super Mario (all series)	6%	Pokemon (all games)	7%
Roblox	5%	Super Mario (all series)	6%
Super Mario Run	4%	Candy Crush (all series)	6%
Cars	4%	Angry Birds (all series)	5%

Fav. Video Game (10-12)	
Game	% Fav
Minecraft	14%
Fortnite Battle Royale	13%
FIFA (all series)	11%
Roblox	9%
Candy Crush (all series)	8%
Call of Duty (all series)	6%
LEGO video games (all se...)	6%
The Sims (all series)	6%
Barbie (all games)	4%
Angry Birds (all series)	4%

CONTEXT

Apple is set to launch a new mobile gaming platform subscription package, as they seek to enter the gaming market.

Fortnite top in the biggest gaming segment; 13-15s

Critically acclaimed Red Dead Redemption 2 is a new favourite of 13-15-year-olds, showing that single-player narrative games can still succeed amidst current leanings towards multiplayer games.

Fortnite quickly falls as a favourite video game, by the time children reach age 16.

Apex Legends - the Fortnite-style battle royale game – hit 50m players in the 28 days following its release. Although Fortnite has over 200m players, Apex Legends was growing much faster in its earlier stages.

Much of its early growth was likely because Ninja – the third most popular YouTuber with teens - was paid around \$1m to play the game on Twitch when it was released to generate interest.

Data analysed by Kids Insights from Google searches, Twitch viewership and our open-ended responses show that popularity of the game spiked initially, likely due to Ninja, but then diminished. Apex Legends is currently not inside the top 20 favorite video games of children in April 2019.

Favourite Video Game

Age 13-15	
Game	% Fav
Fortnite Battle Royale	14%
Call of Duty (all series)	12%
Grand Theft Auto/GTA	10%
Minecraft	10%
FIFA (all series)	9%
Candy Crush (all series)	8%
The Sims (all series)	8%
Red Dead Redemption 2	6%
Mario Kart (all series)	6%
Assassins Creed (all series)	5%

Age 16-18	
Game	% Fav
Call of Duty (all series)	10%
Grand Theft Auto/GTA	9%
FIFA (all series)	9%
Fortnite Battle Royale	8%
The Sims (all series)	7%
Minecraft	6%
Red Dead Redemption 2	6%
Assassins Creed (all series)	5%
Candy Crush (all series)	5%
Temple Run	5%

CONTEXT

Google recently announced its entry into the video game sector with Google Stadia - a game streaming service that will allow players to stream their games to any TV, phone or computer.

Opportunities for brand engagement

Pepsi, Doritos, Disney, Spotify, Toyota and Mastercard are all brands involved in esports sponsorship.

Attendance at esports events has increased across the board. For girls, both spectating and participating in them has risen to 10% since Q4 2018. Taking part in playing esports doubled for girls age 7-9.

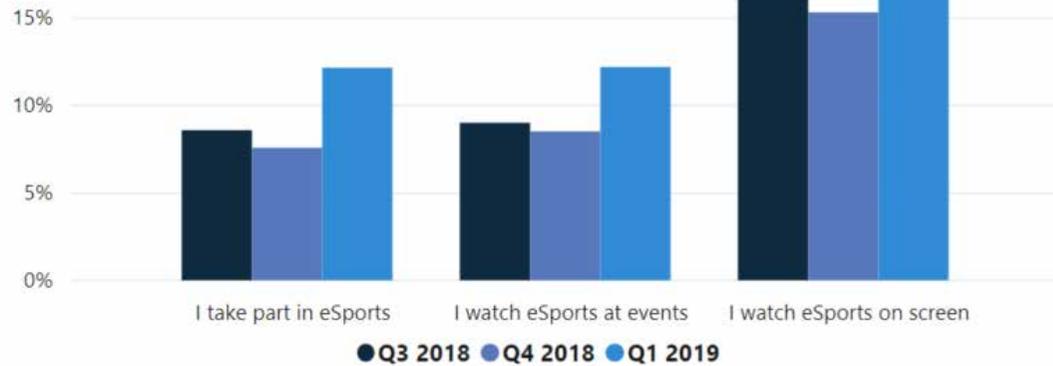
FIFA is the most popular esports watched by kids, followed closely by DOTA 2.

DOTA 2 is a multiplayer online battle arena (MOBA) video game, and a spin-off of Warcraft. The worldwide 2018-2019 DOTA Pro Circuit spans Oct 2018 – June 2019, and is qualifying tournament to decide which teams are eligible to participate in their premier annual tournament, The International.

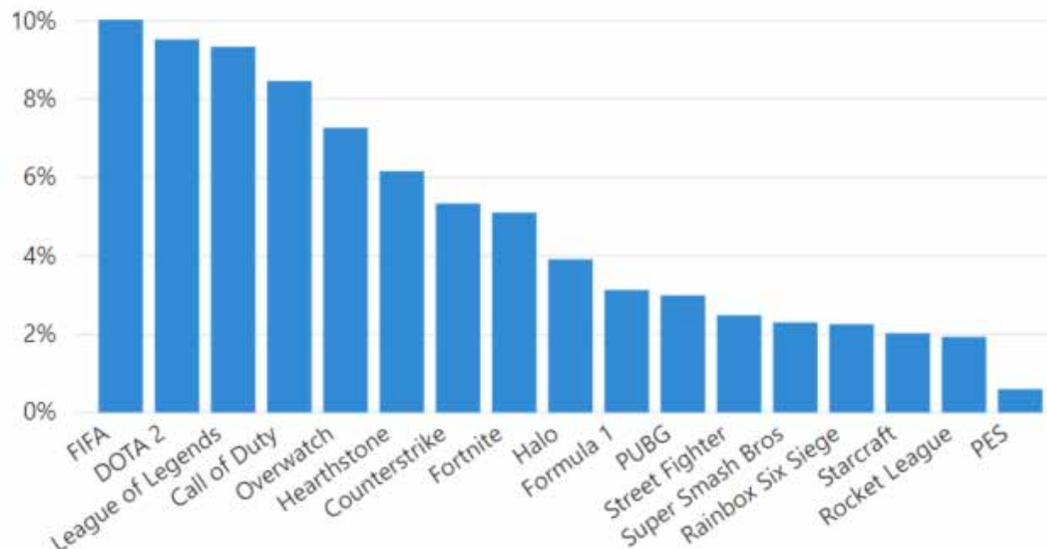
DOTA 2 is known for having the highest prize pools of any esports title. Its popularity in our data doubled overall, and for girls age 13-15 it more than tripled from 5% to 17%. BBC Three covers the event for the UK.

F1 is another favoured esports title, especially for boys age 10-12 where it equalled Fortnite's popularity. Their F1 Esports Series for 2019 is set to commence April 2019.

Esports Engagement (Age 3-18)



Favourite Esports Title



CONTEXT

Pepsi, Doritos, Disney, Spotify, Toyota, Mastercard, Cheez-It, Hershey, Chipotle, Wendy's and Head & Shoulders are all brands involved in esports sponsorship.



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