NEW KIDS ON THE BLOCK

Prepared by Kids Insights and Music Ally for the BPI and ERA.

July 2020

CONTENTS

INTRODUCTION

A child's world in 2020 is more chaotic, diverse, changeable, and complicated than ever before. With children getting personal devices from a younger age, technology is giving kids an opportunity to control what content they consume, who they are influenced by and how they behave. But what does this mean and how does it affect attitudes and behaviours around music consumption?

In this report we will explore what a child's world looks like today, with what they are engaging and what factors are shaping the way they live. It will look at the ecosystem inhabited by kids, what devices and technology they access and how this affects the choices they make. It will also look at new innovations in the music space which have seen more and more collaboration between kids' brands and music.

DEFINING THE NEXT GENERATION

INTRODUCTION

CHILDREN IN 2020

Children today have never known a world where they couldn't access unlimited information at the tap of a button, they are:

Influencers
43% influence their parent's choice in clothes

Collaborative
No longer enough to just consume content – they want to co-create and collaborate

Ambitious
Their hobbies are their career aspirations. Those who say their favourite hobby is gaming tend to aspire to work in IT/Computers

High Spenders
Big named brands are important – Nike, Adidas, Apple

Progressive
Concerned by mental health & the environment. They are also concerned with racism, LGBT rights and gender equality

Visual
Immersive worlds, scattered with images (emojis, Instagram, YouTube the new Google)

Multitaskers
97% are doing something else at the same time as watching TV

Mobile
85% of all kids own a mobile phone in 2020

Ethical & Aware
55% think about their effect on the environment

Constantly Connected
17% of their week is spent on Social Media/ Internet

THEY ARE GROWING UP IN AN EVER-CHANGING WORLD....

KIDS : AGE MILESTONES

With children getting personal devices from a younger age, technology is giving kids an opportunity to control what content they consume, who they influence and how they behave.

AGE 3

AGE 3

79% HAVE ACCESS TO A TABLET

AGE 6

30% INFLUENCE WHAT THEIR PARENTS WEAR & BUY

AGE 7

11% SPEND MONEY USING A DEBIT OR CASH CARD

AGE 8

40% INFLUENCE THEIR PARENTS' CHOICE OF TV SUBSCRIPTION

AGE 10

11% VISIT CITY CENTRES FOR LIVE EVENTS & EXPERIENCES

AGE 12

77% OWN A MOBILE PHONE

AGE 16

70% HAVE SHARED SELFIES OR STATUSES ON SOCIAL MEDIA

RAPID TECHNOLOGICAL ADVANCEMENTS WITHIN THE LAST TEN YEARS CONSTANTLY SHIFT THE WAY CHILDREN BEHAVE AND INTERACT

CHILDREN BORN IN THE SAME YEAR AS THE IPAD ARE APPROACHING SECONDARY SCHOOL AGE

- **Instagram**
- **FaceTime**
- **WhatsApp**
- **Oculus Rift**
- **Siri**
- **3D Printers**
- **Google Glass**
- **Apple Watch**
- **Tesla Cars**
- **Fortnite**
- **Smart Speakers**
- **TikTok**
- **AirPods**
- **PS4, Xbox One**
- **Pokémon Go**
- **Kindle Fire**
- **Minecraft**
- **Twitch**
- **Snapchat**

THE SPEED AT WHICH THINGS 'GO GLOBAL' HAS ACCELERATED BEYOND BELIEF

TIME TO REACH:
50 MILLION USERS

TV - 22 YEARS

INTERNET – 7 YEARS

FACEBOOK – 4 YEARS

POKÉMON GO – 19 DAYS

Source: 50 Million Users: Visual Capitalist

THINGS ARE CHANGING... AND QUICKLY

	3-12 YEAR OLDS IN 2018	3-12 YEAR OLDS IN 2020
SMART SPEAKER OWNERSHIP	3%	17%
DEVICE CONTROL	Voice - 8%	Voice - 14%
FAVOURITE APP	YouTube (11%)	YouTube (11%)
CHAT PLATFORM	WhatsApp (17%)	WhatsApp (28%)
FAVOURITE TV SHOW	Paw Patrol (11%)	Paw Patrol (9%)
% WATCHING MOSTLY NETFLIX	19%	30%
% VISITING YOUTUBE MULTIPLE TIMES PER DAY	40%	50%
FAVOURITE YOUTUBER	DanTDM (5%)	Ryan's World (5%)

	13-18 YEAR OLDS IN 2018	13-18 YEAR OLDS IN 2020
SMART SPEAKER OWNERSHIP	6%	29%
DEVICE CONTROL	Voice - 7%	Voice - 12%
FAVOURITE APP	YouTube (13%)	YouTube (11%)
CHAT PLATFORM	Snapchat (25%)	WhatsApp (29%)
FAVOURITE TV SHOW	The Big Bang Theory (10%)	Stranger Things (11%)
% WATCHING MOSTLY NETFLIX	27%	41%
% VISITING YOUTUBE MULTIPLE TIMES PER DAY	52%	55%
FAVOURITE YOUTUBER	Zoella (5%)	PewDiePie (5%)

Dates used: March-May 2018 versus March-May 2020

CHILDREN ARE ALSO PROGRESSIVE, ETHICAL (AND AWARE) – EVEN AT A YOUNG AGE

WHICH OF THESE ISSUES CONCERN YOU MOST (TOP 10) – 3-8 year olds

UK

Coronavirus	▲	50%
Bullying		27%
Animal Cruelty		22%
Environment /Climate change		13%
Racism	▲	11%
Terrorism		10%
Mental Health	▲	9%
Economy	▲	8%
Homelessness	▼	8%
Violent Crime		7%

FRANCE

Coronavirus	▲	52%
Animal Cruelty		18%
Environment /Climate change	▼	14%
Racism		10%
Bullying		10%
Economy	▲	7%
Violent Crime		7%
Obesity	▲	6%
Immigration	▲	6%
Human Rights issues		5%

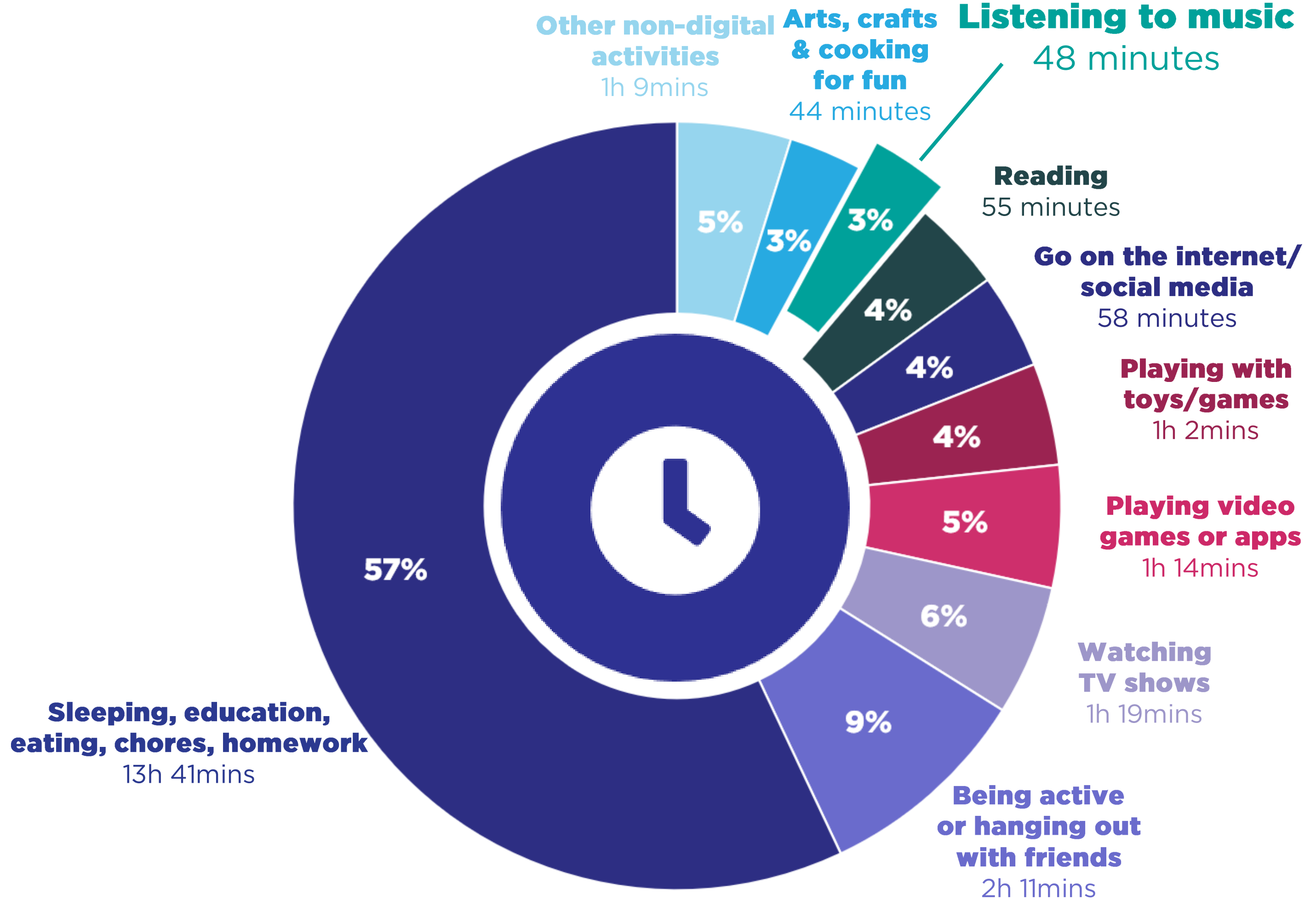
GERMANY

Coronavirus	▲	50%
Animal Cruelty		23%
Environment /Climate change	▲	20%
Bullying		19%
Violent Crime	▼	13%
Terrorism		12%
Racism	▲	8%
Employment opportunities		8%
Homelessness		7%
Economy		7%

▼ ▲ +/- last three months

AND THEY HAVE BUSY DAYS – WITH LOTS TO DO

TIME SPENT ON A TYPICAL DAY (AS A MAIN ACTIVITY)
Jan – June 2020 (6-12s)



MAY 2020 vs JAN 2020 (6-12s)

50 mins
LISTENING TO MUSIC
+9 mins a day

3 hours 36 mins
ON SCREEN
+16 mins a day

6 hrs 5 Mins
OFF SCREEN
+17 mins a day

KI Portal data UK: 6-12s January 20 vs May 20 N=2k Based on an average day (weekdays/weekends/holidays)

ON SCREEN
THE DIGITAL WORLD

WHAT DEVICES DO THEY USE?

MOBILE PHONE

BETWEEN 11 AND 12 IS THE AVERAGE AGE TO RECEIVE FIRST PHONE

SMART SPEAKER

297% INCREASE IN 10-12 OWNERSHIP FROM Q4 2018 TO Q2 2020

TABLET

TWO-THIRDS OF 3-5s OWN THEIR OWN

HEADPHONES

35% INCREASE IN 13-15 OWNERSHIP FROM Q4 2018 TO Q2 2020

WEARABLE TECH

40% INCREASE IN 10-15s OWNERSHIP FROM Q4 2019 TO Q2 2020

GAMES CONSOLE

52% OWN, WITH A 3% INCREASE FROM Q4 2018 TO Q2 2020

THEY ARE DIGITAL NATIVES, USED TO ALL TYPES OF TECH...

17%

OF KIDS PREFER TO CONTROL THEIR DEVICES USING **VOICE**

... but the way they use and access information is beginning to change

Kids now prefer personal and portable devices, such as tablets (59%) and mobile phones (55%), which they can control themselves – most commonly by touch (67%).

However, in recent months, there has been **a steady increase** in the number of teens who **prefer to control their devices through voice** (17%), by 4% in June 2020 alone.

The easy-to-use nature of voice-controlled devices gives them universal appeal but affords them particular popularity with young children who are new to using devices. There is no need to be able to read or write with smart speakers, which makes them a simple introduction to technology for both parents and children.

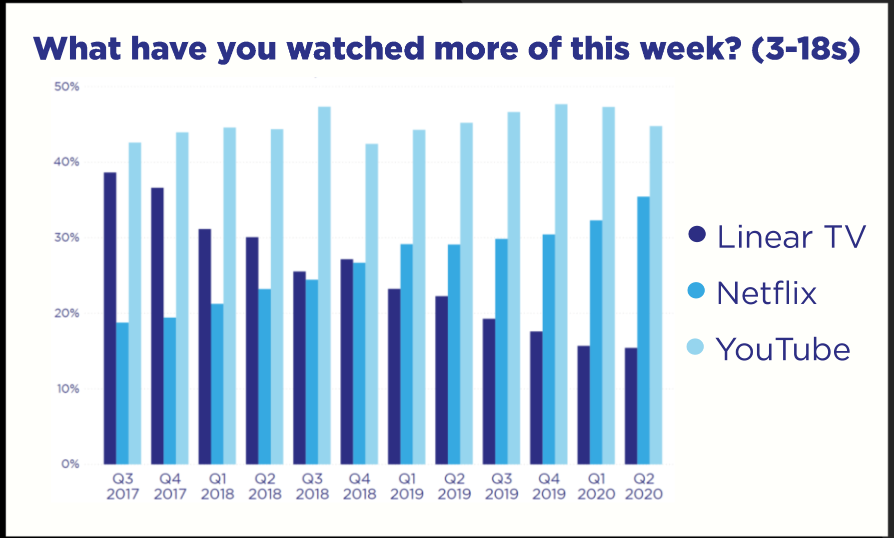
The increased rate of kids accessing these voice-activated devices opens new avenues to consume content and new touchpoints for brands.

Smart speakers – and Generation Speak – have already started disrupting the way of children consume content and information today, with 14% of tweens (10-12) using smart speakers to help with homework in the UK.

With more kids having their own smart speaker devices we have also seen a 37% increase in the proportion of kids aged 3-18 using smart speakers to listen to music (it is the number one use of the device).

HOW CONTENT IS CONSUMED HAS CHANGED

ON-DEMAND BECOMES INCREASINGLY IN-DEMAND



Some of the biggest brands in the world are investing tens of billions of dollars into content and platforms in an intense battle for families' limited money and time.

Kids Insights track whether kids are watching more linear TV, YouTube, Netflix, or Amazon Prime.

Our data shows that in the UK, between Q1 2018 and Q4 2019, there was a shift of -1.7 million children (under 18) away from linear TV. At the same time, there has been a shift of +1.1 million children towards Netflix.

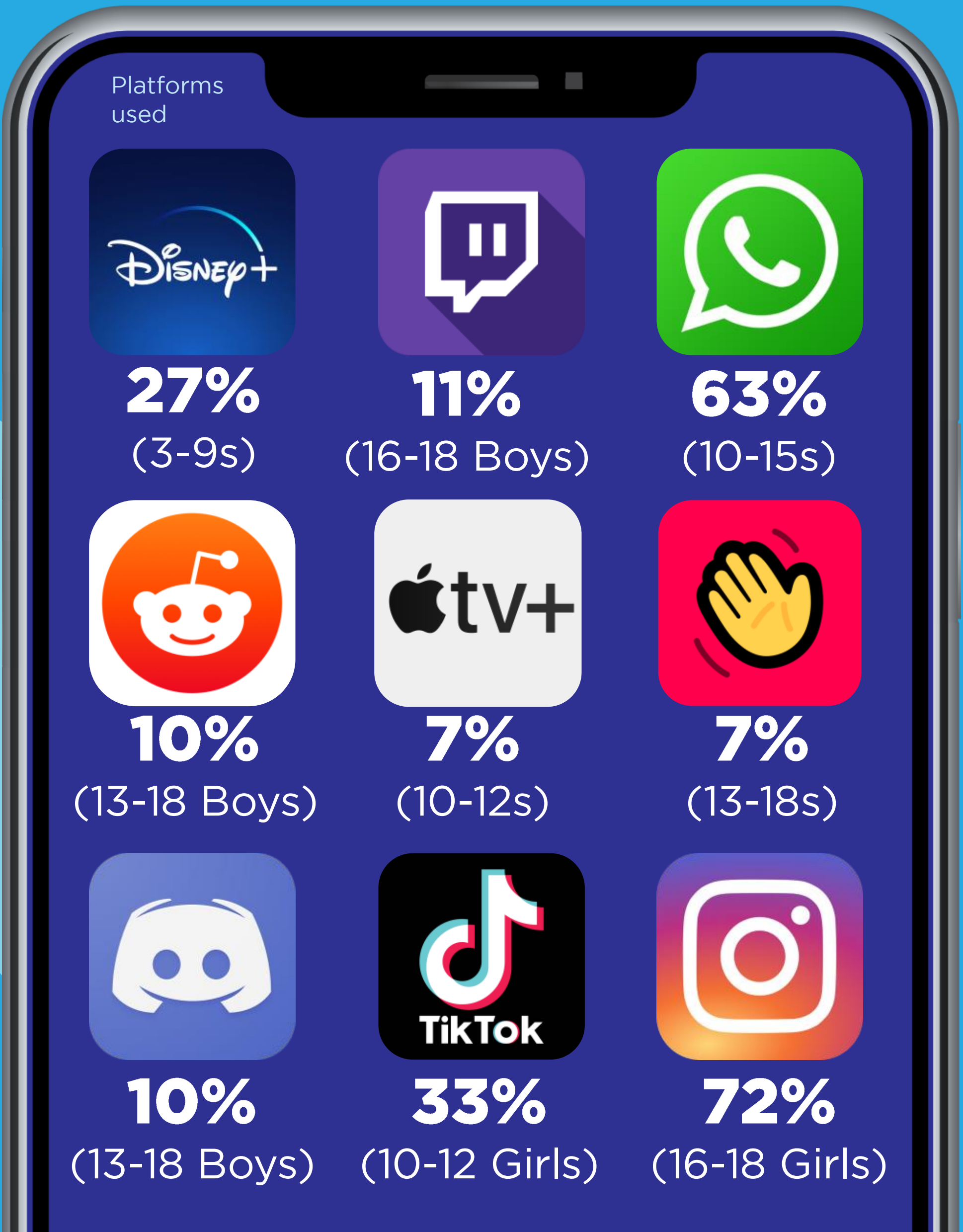
In the US, between Q3 2018 and Q4 2019, the shift away from linear TV has been -3.9 million children, while the shift towards YouTube has been +7 million children.

This huge behavioural viewing shift explains why the 'streaming wars' are intensifying, with the likes of Netflix, Amazon, Disney, Apple, HBO, WarnerMedia and NBCUniversal each investing billions of pounds in subscription services.

In a decade's time, global OTT content spending is expected to reach almost $250bn, according to Future Market Insights.

In an industry full of uncertainty and disruption, content brands are still figuring out their business models and strategies to compete.

PLATFORM USAGE IS INCREASINGLY FRAGMENTED



In addition to consuming 'traditional' content kids' attention is fragmented across a huge range of increasingly niche platforms. This means it is hard to reach mass audiences, but it's easier than ever before **to reach your niche community.**

Discord and Twitch are mainly favoured by teen boys, with their original and primary functions based around gaming.

However, this is beginning to shift.

Twitch report that non-gaming content has quadrupled over the past three years on the platform, with music playing a role in this. Lockdown accelerated this trend, with artists such as Diplo livestreaming on the platform. In July 2020, rapper Logic signed an exclusive streaming deal with Twitch.

Twitch is also home to its own community of amateur musicians building their own small audiences on the network.

Brands can use also Discord (bottom left) and Reddit (middle left) to create and foster online communities with their avid fans.

01/04/20 – 30/06/20

AND CONTENT IS MORE INTERACTIVE

CREATING ENGAGING & IMMERSIVE EXPERIENCES

AUGMENTED REALITY

INTERACTIVE STORYTELLING

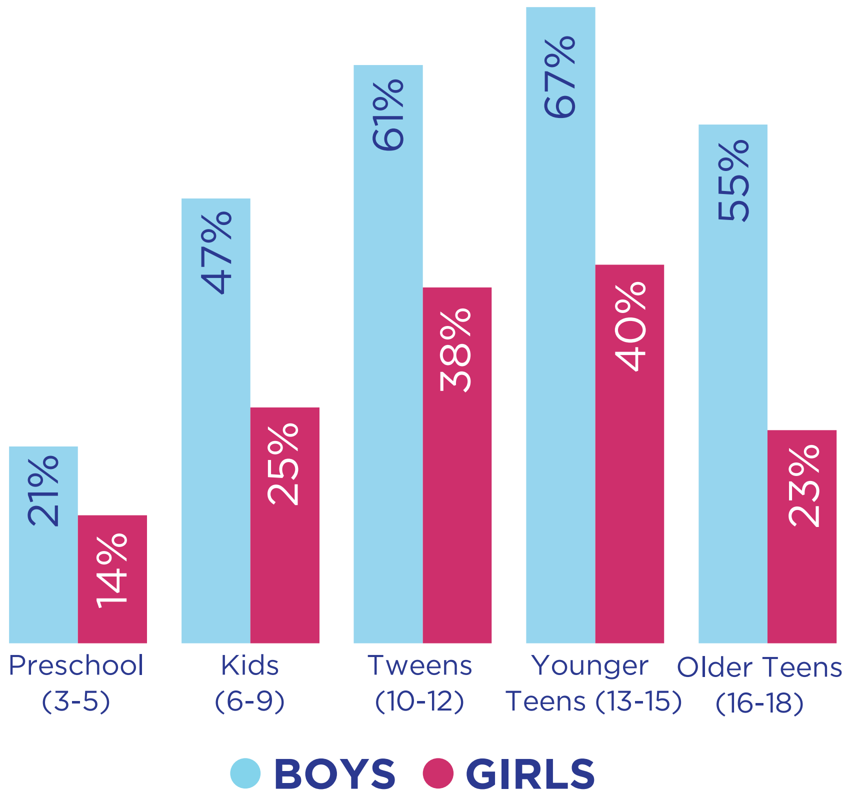
We are starting to see signs of how media can utilise new technologies to bring a new lease of life to conventional content.

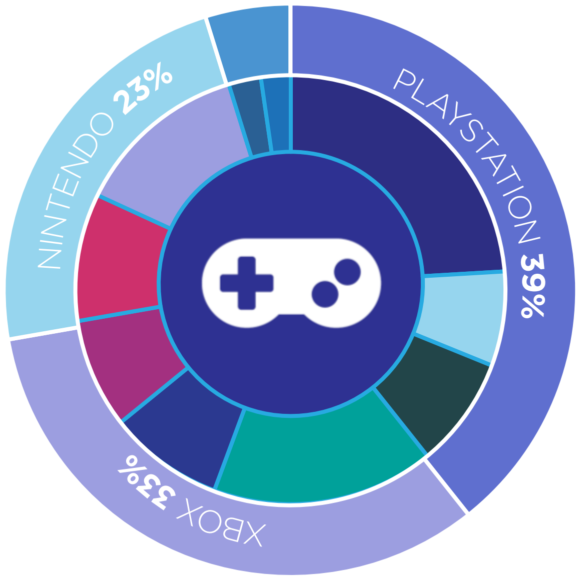
Will we see broadcasters and TV production companies develop more interactive content to enable viewers to control the story? Will radio stations embrace Generation Speak and the ability for listeners to control devices and content through voice activated commands? Could magazines utilise augmented reality (AR) to entice new audiences through digital free gifts and games?

Broadcaster Turner expanded the reach of an interactive quiz app (Gumball VIP) which was designed to be shown alongside Cartoon Network's 'The Amazing World of Gumball'. In a bid to engage viewers of the linear TV show, the app uses voice-recognition technology to quiz children in real-time as they watch episodes on Cartoon Network. Reportedly, ratings for the show have increased by up to 44% since the app launched. Netflix are also experimenting, with interactive 'choose your own story' content across Bear Grylls, Black Mirror and Shrek-related content.

GAMING IS NOW AT THE CENTRE OF MANY KIDS' DIGITAL WORLDS

CONSOLE OWNERSHIP
JAN-JUN 2020





BRAND MARKET SHARE

- PlayStation 4 (24%)
- PlayStation 3 (7%)
- PlayStation 4 Pro (8%)
- Xbox One (16%)
- Xbox 360 (9%)
- Xbox One X (8%)
- Nintendo Wii (10%)
- Nintendo Switch (13%)
- Retro Console (3%)
- Google Stadia (2%)

GAMING IS THE 2nd FAVOURITE HOBBY OF ALL KIDS

AND IT'S NOT JUST FOR BOYS

THE RISE OF GIRL GAMERS

Mobile gaming and shifting gender stereotypes have helped pave a new path for female players – their numbers **increased by 9%** throughout 2019.

Lockdown is also creating new gamers. Animal Crossing New Horizons was released as lockdown was imposed in March and quickly became the **6th favourite game on console with teen girls in April.** The game's success is mostly due to its relaxed gameplay, open world and social nature.

The fully customisable nature of the game's characters has also made it easy (and free) for brands to start utilising the platform, creating their own branded merchandise in game. As a result, agile brands, especially in the fashion industry, have utilised the platform to increase brand awareness and engage with their audiences.

With more girls gaming, there is an opportunity to develop more content that includes inspirational female characters and role models.

GAMING IS NOW A SPORT

ESPORTS BECOMES MAINSTREAM

This generation of children are avid gamers but also spend a significant amount of time watching streamers and esports events.

Kids aged 10 to 18 watching esports on-screen increased by **37% over the last 12 months,** while participation increased by 60% during this time.

Virtual grand prix throughout lockdown have proved successful for F1, with the number of 10-18s watching F1 esports increasing 2.3x between Q1 and Q2 2020.

As esports shifts from a niche pastime to mainstream entertainment, the number and type of brands utilising esports in their marketing and advertising is increasing.

Sponsors of esports events no longer include just PC and gaming brands, but BT (who significantly sponsor all football federations across the UK). Nike are also beginning to produce esports team jerseys for the first time.

AND GAMING PLATFORMS ARE NO LONGER JUST FOR PLAYING GAMES

We are now seeing the definition of a video begin to shift and platforms like Fortnite are accelerating the movement towards being a media platform rather than just a place to game. When we recently asked what children are talking about with their friends, Fortnite ranked as the second highest topic after Coronavirus and is top of mind for many. Rapper Travis Scott's Astronomical event helped propel him to the 7th highest 'new' artist in our data after the event, bringing a new audience to his music.

Other games such as Grand Theft Auto also provide a space for virtual entertainment (though rated 18+ and not targeted at children). A 2018 update for GTA enabled players to book virtual versions of famous DJs including Tale of Us and Dixon.

With festivals also cancelled this year, the team behind 'Shangri-La' (a component of Glastonbury) created **"the world's biggest arts and music VR festival"**. Other electronic music festivals and events have been held within Minecraft itself.

Likewise, artists and venues – from The Rolling Stones, to amateur DJs have been streaming on sites such as YouTube or Twitch, used by 11% of older teen boys. Online streams enable children to discover new music from around the world, further diversifying the range of their interests.

SOCIAL MEDIA IS THE FOUNDATION STONE TO A KID'S DIGITAL WORLD

YOUTUBE'S POPULARITY REMAINS STRONG

53%

access a few times a day

30%

say it's their favourite social platform

64%

spend over 30 mins a day on the platform

KI Portal Data 12/4/20-12/7/20– 3-18 year olds

AND YOUTUBE IS A KEY CATALYST FOR MUSIC

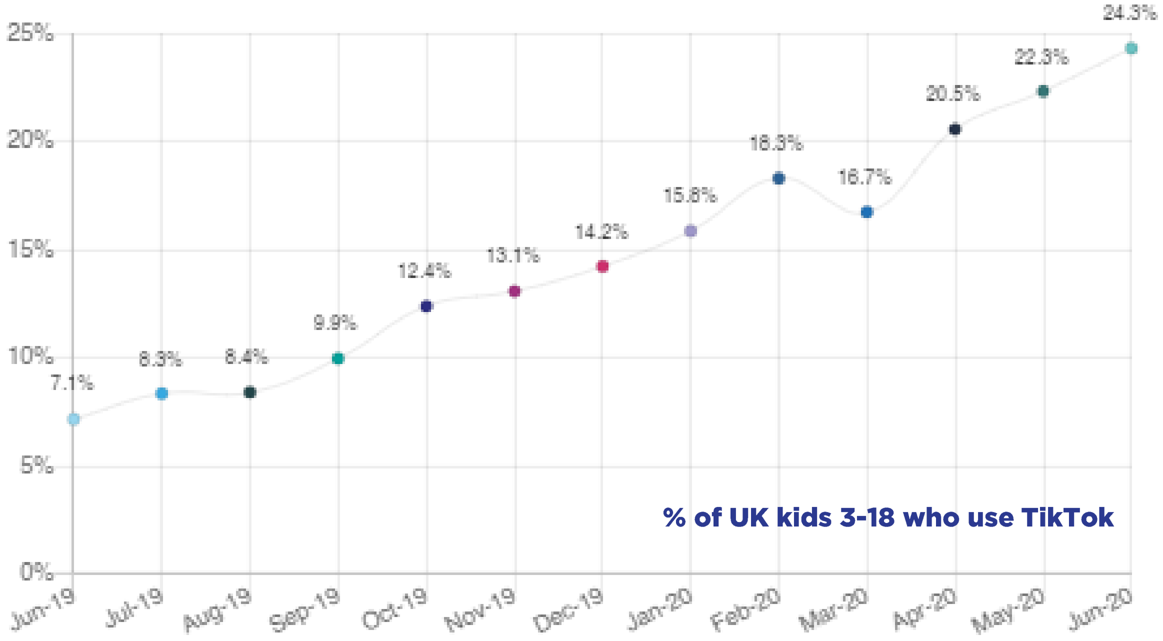
Reasons for watching YouTube

3-5	6-9	10-12	13-15	16-18
Funny clips	Funny clips	YouTubers	**Music videos**	**Music videos**
Episodes	YouTubers	**Music videos**	Funny clips	YouTubers
YouTubers	**Music videos**	Funny clips	YouTubers	Funny clips
Music videos	Gamers	Gamers	Gamers	Gamers
Unboxing	Episodes	Movie trailers	Movie trailers	Movie trailers

KI Portal Data: 01/06/19-31/05/20

NEW PLAYERS ARE ALSO ON THE BLOCK
TIKTOK IS RISING...

Top new app downloaded in June 2020 by all 3-18s



6TH FAVOURITE APP OF 3-18 YEAR OLDS IN THE LAST YEAR

UP TO 3RD PLACE IN JUNE 2020

KI Portal Data: 01/06/19-30/06/20

SHORT-FORM VIDEO IS EXTREMELY POPULAR WITH KIDS

TikTok

TikTok is also the number one ‘next big thing’ according to kids.

In the last month 39% of all kids in the UK aged 10-18 used TikTok, equivalent to 2.7m.

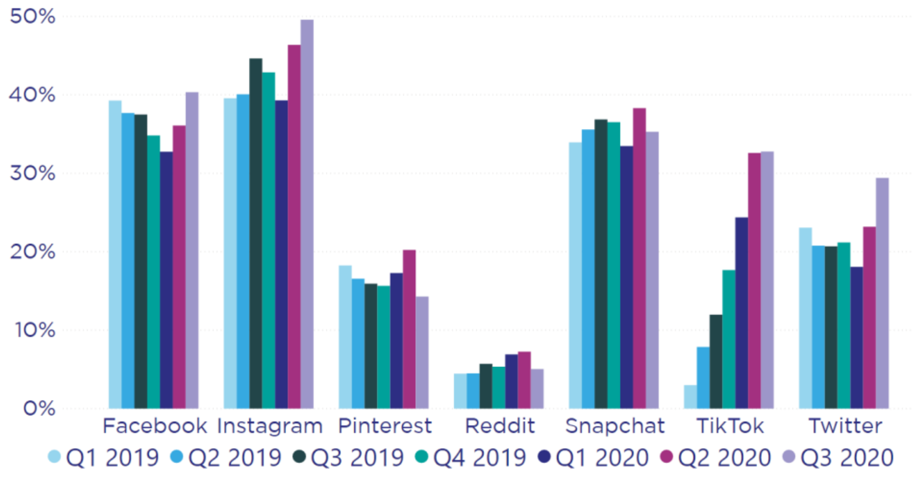
In development we are seeing Facebook and Instagram experiment with short-form video features called Reels. Byte, another new social platform which this time focusses on 6 second videos, jumped to the top of app stores in July.

The fast-paced nature of these shifts highlights the importance of keeping your content agile in line with the changing interests of kids.

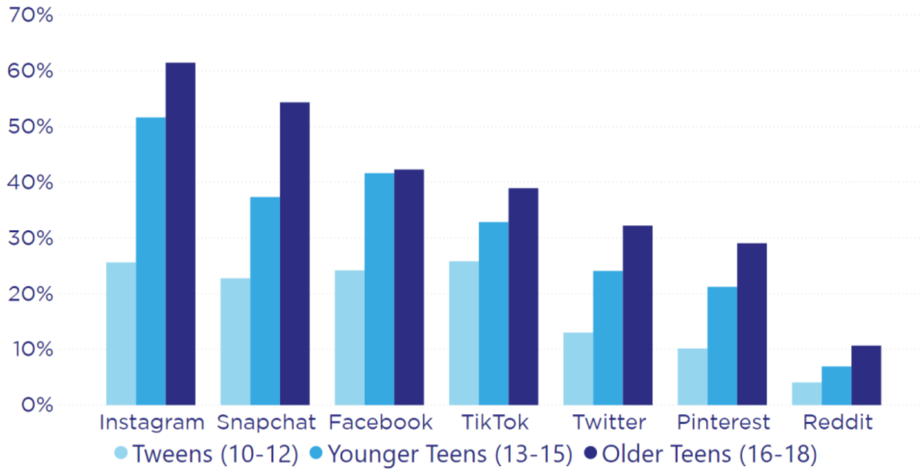
KI Portal Data: 20/6/19-20/07/20

AND SOCIAL MEDIA CONTINUES TO EVOLVE

PLATFORMS USED OVER TIME (SELECTED, 10-18s)



PLATFORMS USED BY AGE (SELECTED, Q2 2020)



SOCIAL SHOPPING

With brick and mortar stores mostly closed, spending has shifted online by 23% over Q2 2020. Our data shows the number of 10-18s who sell things on social media having also increased by 10% from February to April.

Social media giants have long been adjusting their platforms to cater for retail, but recent innovations across Facebook's platforms have accelerated the trend.

Starting from mid-May, consumers have been able to browse and buy products directly from a business's Facebook page or Instagram profile. These two platforms are used by 25% and 28% of kids. TikTok is also experimenting with similar features.

But what's next for online shopping? Amazon (favoured by 37% of 10-15s) is the current leading brand in the space and its main platform is based around text and images.

The future of online shopping resembles something more like a social media website, with features based around discovery (where users browse the app without looking for anything in particular) and video, which helps capture more of the experience of real-life shopping.

AUDIO-BASED SOCIAL

Twitter, used by 24% of teenagers in the US, recently rolled out a new feature enabling users to record voice clips to share instead of written tweets. Although Twitter is not as popular as favourite Instagram (42%), it is an interesting move.

Clubhouse is an upcoming social media platform that is described as "an audio-based social network where people can spontaneously jump into voice chat rooms together". Though still unreleased, the app created a huge amount of interest this quarter. Facebook quickly demonstrated a feature with similar capabilities.

Houseparty is an example of another social app which doubled in popularity during Coronavirus, partly thanks to the more 'spontaneous' atmosphere it creates.

SOCIAL MEDIA IS ALSO A WORLD WHERE ANYONE CAN INFLUENCE

kids INSIGHTS

And Social Media is home to the world's highest-paid children making them highly aspirational.

YouTube Channel:

RYAN'S WORLD

Reported net worth:

$112M

Being a YouTuber/Vlogger is: A top 5 career choice for 3-8 year olds in the UK

KI Portal data: 3-8's last 3 months 01/03/2020-31/05/20
Ryan's Net Worth stats https://statsmash.com/calculator/ryan's-world-net-worth

kids INSIGHTS

INFLUENCER SPOTLIGHT: KSI

KSI: A NEW KIND OF SUPERSTAR FOR THIS GENERATION OF KIDS

Though initially under-reported in the mainstream media, KSI is one of this generation's biggest entertainers and personalities.

Originally finding fame through FIFA YouTube videos, 7% say KSI is their favourite YouTuber, peaking in popularity with boys aged 15-18. His recent surge in popularity has seen him overtake PewDiePie as teenage boys' top YouTuber, a position PewDiePie held throughout 2019.

KSI's YouTube account has 21 million subscribers, and he's also one of the seven members of the Sidemen group - who have a reported 25 billion combined views.

Like any valuable brand, KSI has expanded his ecosystem. Most notably he took part in a two-part boxing match against fellow YouTuber Logan Paul. The events sold out stadiums in both Manchester and LA and were streamed pay-per-view on the new sports platform DAZN (which 4% of teen boys use).

But KSI has continued to diversify, with a successful move into the music industry. In Q3 2020 he is the 6th favourite musician of teen boys, behind only international stars such as Eminem, Ed Sheeran and Drake following his debut album Dissimulation which entered the Official Album Chart in the UK at number 2 in May 2020.

Could brands find their next superstar influencer on TikTok - which our data shows reaches an indicative 2.3m (18%) kids in the UK, or even Twitch (717k)?

INFLUENCER SPOTLIGHT: NINJA

WHAT'S NEXT FOR NINJA AND THE STREAMING WORLD?

Almost one year ago the biggest name in video game streaming, Ninja, teamed up with Microsoft's Mixer streaming platform in an exclusive deal.

In Q1 2019, before the move, Ninja was the 8th favourite YouTuber with boys aged 10-15 and had over 100k avid fans aged 3-18. Twitch, at the time used by 7% of boys aged 10-18, was also a key component of Ninja's audience. Therefore, it was somewhat of a risk moving exclusively to a new platform.

However, in June, Microsoft announced that the platform would be shutting down and transitioning to Facebook Gaming. With 90.2k 10-15s using the platform, Mixer wasn't as popular as rivals Twitch, but the announcement was a surprise.

Despite Mixer's low popularity, Ninja's fame didn't diminish. In the last 3 months, he ranked as the 68th most popular celebrity for boys, meaning he is more popular than Harry Potter actor Daniel Radcliffe and rapper Travis Scott.

Ninja has reportedly turned down $60m to move to Facebook Gaming with Microsoft, leaving his future in question. Streamers, with their huge audiences and influence are now commodities, with brands willing to pay huge sums for exclusive content. Could he disrupt the industry once again and create his own branded platform, following the trend for 'direct to consumer' content?

BUT HOW DOES MUSIC FIT INTO THEIR LIVES?

CHILDREN AND MUSIC

Music Fans – the characteristics and habits of children who love music.

HOBBIES AND INTERESTS REMAIN THE SAME THROUGHOUT CHILDHOOD

GIRLS

3-5	6-9	10-12	13-15	15-18
DANCING	DANCING	FOOTBALL	DANCING	READING
DRAWING	ARTS AND CRAFTS	DANCING	READING	DANCING
PLAYING	READING	DRAWING	FOOTBALL	**LISTENING TO MUSIC**
ARTS AND CRAFTS	DRAWING	READING	**LISTENING TO MUSIC**	DRAWING
SWIMMING	SWIMMING	VIDEO GAMES	VIDEO GAMES	ARTS AND CRAFTS

BOYS

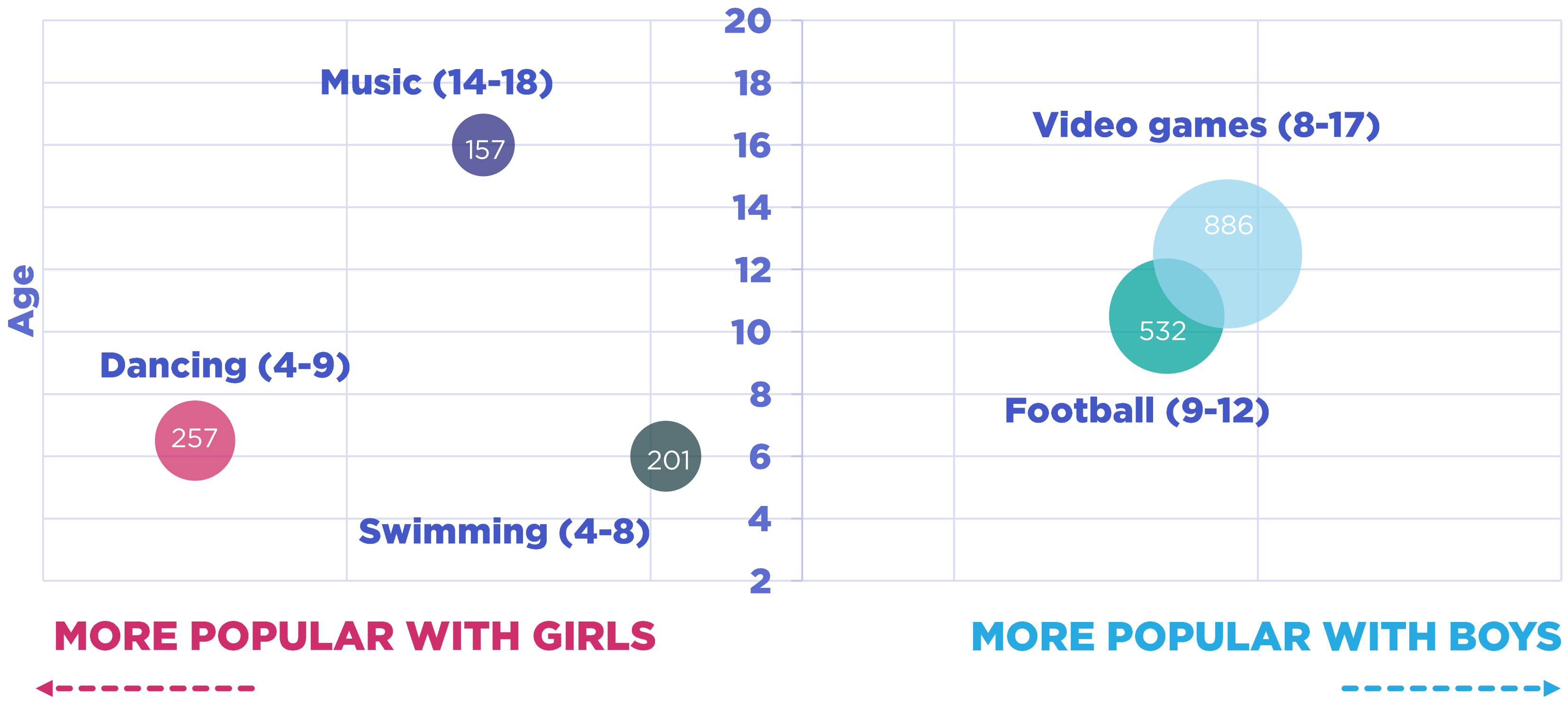
3-5	6-9	10-12	13-15	15-18
FOOTBALL	FOOTBALL	FOOTBALL	FOOTBALL	VIDEO GAMES
PLAYING	VIDEO GAMES	VIDEO GAMES	VIDEO GAMES	FOOTBALL
VIDEO GAMES	READING	**LISTENING TO MUSIC**	**LISTENING TO MUSIC**	**LISTENING TO MUSIC**
DRAWING	SWIMMING	SWIMMING	SWIMMING	READING
SWIMMING	LEGO	DRAWING	CYCLING	SPORT

But listening to music becomes a serious hobby for kids when they reach teenage years

MUSIC SITS IN A UNIQUE SPACE AGAINST OTHER HOBBIES & INTERESTS

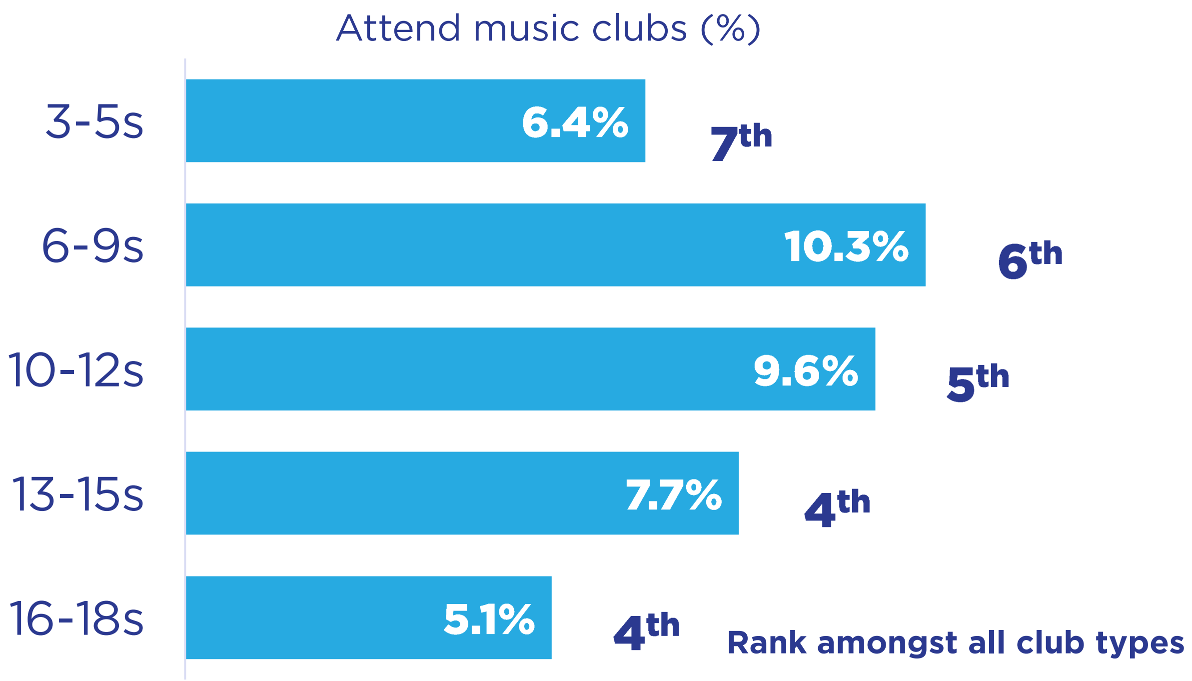
Music overall skews more towards girls and 14-18s over-index on listening to music as a favourite hobby

SWEET SPOT AUDIENCES



Based on number saying each activity is their favourite hobby. Numbers in bubbles are the number of people who said each was a favourite hobby across 6 month period.

MUSIC CLUBS ARE ENCOURAGED FROM A YOUNG AGE



Music club attendance peaks amongst 6-12 year olds, at 10%. Older teens are the least likely to be part of any clubs – however, music clubs rank 4th for them.

1 in 3

34% OF PARENTS WITH CHILDREN AGED 4 AND UNDER LISTEN TO MUSIC AND/OR ATTEND MUSIC CLASSES WITH THEIR KIDS.

Ki Portal Data: 01/06/19-31/05/20.
Music Club – kids interpretation. Could be a place to sing, play music or listen .

kids INSIGHTS

Music is a popular subject at school among younger age groups for whom learning is more play-orientated

3-5	6-9	10-12	13-15	16-18
Art (27%)	Maths (23%)	Art (16%)	Maths (14%)	Maths (13%)
PE (18%)	Art (16%)	Maths (16%)	English (11%)	IT (11%)
Maths (14%)	PE (14%)	PE (12%)	PE (10%)	Science (11%)
Music (12%)	English (13%)	IT (11%)	IT (10%)	Art (9%)
English (11%)	Science (8%)	English (10%)	Art (10%)	PE (9%)
	Music #6 (7%)	**Music #8 (6%)**	**Music #7 (9%)**	**Music #10 (4%)**

Ki Portal Data: 01.06.19-31/05/20.

Yet, amongst those who say listening to music is their favourite hobby, it is an outright winner for most age groups…

3-5	6-9	10-12	13-15	16-18
Music (48%)	**Music (38%)**	Art (24%)	**Music (18%)**	**Music (17%)**
Maths (13%)	Maths (19%)	**Music (23%)**	English (17%)	Science (14%)
Science (10%)	English (8%)	English (19%)	Maths (15%)	Art (11%)
English (7%)	Geography (17%)	Maths (11%)	IT (12%)	Maths (9%)
Art (7%)	Art (6%)	Science (5%)	Art (10%)	Drama (7%)

Ki Portal Data: 01.06.19-31/05/20.

BUT A CAREER IN MUSIC ISN'T SOMETHING MANY CHILDREN CONSIDER

Few mention career choices associated with music. However, for younger teens it's 4th most favoured profession

3-5	6-9	10-12	13-15	16-18
Doctor (10%)	Teacher (8%)	Artists (7%)	IT (8%)	IT (7%)
Firefighter (6%)	YouTuber (7%)	YouTuber (6%)	Engineer (7%)	Engineer (5%)
Dancer (5%)	Footballer (6%)	IT (6%)	Teacher (5%)	Lawyer (4%)
Police person (5%)	Doctor (6%)	Teacher (6%)	**Musician (5%)**	Business person (4%)
Singer #8 (4%)	**Singer #12 (3%)**	**Singer #19 (2%)**	Doctor (3%)	**Musician #14 (2%)**
Musician #17 (2%)	**Musician #18 (2%)**	**Musician #23 (2%)**	**Singer #26 (1%)**	**Singer #44 (1%)**

Ki Portal Data: 01/06/19-31/05/20.

kids INSIGHTS

AMONG THOSE WHO SAY LISTENING TO MUSIC IS THEIR FAVOURITE HOBBY, BEING A MUSICIAN IS THE TOP CHOICE FOR MOST AGE-GROUPS…

3-5	6-9	10-12	13-15	16-18
Musician #1 16% vs. 4%	**Musician #1** 10% vs. 4%	**Musician #4** 7% vs. 3%	**Musician #1** 11% vs. 9%	**Musician #1** 12% vs. 4%
Singer #2 10% vs. 7%	**DJ #3** 8% vs. 2%			

Ki Portal Data: 01.06.19-31/05/20.

BUT HOW DO MUSIC FANS DIFFER FROM THE AVERAGE TEEN?

KIDS AGED 14-18 WHOSE FAVOURITE HOBBY IS LISTENING TO MUSIC ALSO LIKE...

Fav activities

1. Restaurant (39.5%)
Average for 14-18s=26.6%

2. Theatre/cinema (31.8%)
Average for 14-18s=22.2%

3. Parks (20.4%)
Average for 14-18s= 19.0%

4. Live music (15.7%)
Average for 14-18s= 10.3%

5. The beach (12.1%)
Average for 14-18s= 12.6%

Fav brands

1. Nike (19.7%)
Average for 14-18s=21.7%

2. Apple (17.2%)
Average for 14-18s=8.3%

3. Adidas (7.6%)
Average for 14-18s= 7.9%

4. Primark (3.2%)
Average for 14-18s= 0.9%

5. Vans (2.5%)
Average for 14-18s= 1.4%

Fav book type

1. Fantasy (18.5%)
Average for 14-18s= 15.0%

2. Modern Fiction (10.8
Average for 14-18s=7.9%

3. Horror (8.9%)
Average for 14-18s=7.1%

4. Comedy (8.9%)
Average for 14-18s= 7.2%

5. Celebrity (7.6%)
Average for 14-18s= 4.3%

Fav store type

1. Fashion (42.7%)
Average for 14-18s= 37.1%

2. Supermarkets (39.5%)
Average for 14-18s=35.3%

3. Bargain store (33.8%)
Average for 14-18s=25.8%

4. Hair & beauty (31.8%)
Average for 14-18s= 20.6%

5. Gaming stores (26.1%)
Average for 14-18s= 28.4%

Music fans are keen on **entertainment** generally and are keen visitors to restaurants, the cinema and of course, live music.

Being entertainment fans, **tech** giant Apple is a key brand for them, and they over-index on **apparel** and **footwear** brands.

Reading is the 3rd top hobby for 14-18s. Music fans are **77%** more likely than average to favour **celebrity books**.

Being interested in their personal image, music fans over-index for fashion stores (+15%) and hair & beauty stores (+54%).

MUSIC FANS V THE AVERAGE TEEN

DEVICES OWNED

1. **Mobile (87.4%)**
   Average for 14-18s=84.0%
2. **Laptop (61.7%)**
   Average for 14-18s=57.0%
3. **Tablet (40.4%)**
   Average for 14-18s= 46.4%
4. **Headphones (37.1%)**
   Average for 14-18s= 48.0%
5. **TV (36.5%)**
   Average for 14-18s= 42.3%

Kids aged 14-18 whose favourite hobby is **listening to music** also have....

FAV PLACES TO EAT OUT

1. **McDonald's (21.0%)**
   -Average for 14-18s=15.8%
2. **Nando's (13.8%)**
   -Average for 14-18s=10.2%
3. **KFC (7.8%)**
   -Average for 14-18s= 7.3%
4. **Pizza Hut (5.4%)**
   -Average for 14-18s= 4.5%
5. **Wagamama (4.8%)**
   -Average for 14-18s= 3.7%

Mobile and laptop ownership is high amongst 14-18s who love listening to music however they under-index on owning headphones. They eat out less than average (38% eat out only once a month vs. 31%) but they over-index on many fast-food outlets when they do.

Based on Portal Data: 01.07.19-.30.06.20 Music fans: n.167; Average n.3.7K

MUSIC FANS V THE AVERAGE TEEN

CONCERNS

1. **Environment/climate change (35.9%)**
   -Average for 14-18s= 29.8%
2. **Bullying (35.3%)**
   -Average for 14-18s=31.2%
3. **Terrorism (34.7%)**
   -Average for 14-18s=28.5%
4. **Racism (30.5%)**
   -Average for 14-18s= 27.9%
5. **Homelessness (29.9%)**
   -Average for 14-18s= 22.2%

Kids aged 14-18 whose favourite hobby is **listening to music** also have....

CAREER ASPIRATIONS

1. **Teacher (9.4%)**
   -Average for 14-18s=4.4%
2. **Musician (8.1%)**
   -Average for 14-18s=1.7%
3. **Psychologist (6.3%)**
   -Average for 14-18s=3.3%
4. **IT / computers (5.6%)**
   -Average for 14-18s= 7.5%
5. **Actor (4.4%)**
   -Average for 14-18s= 1.8%

Teenage music fans are thoughtful, and are concerned about events much more than the average teen. They particularly care about climate change and homelessness more than average. They over-index on nurture, creative and legal-based careers and under-index on IT related professions.

Based on Portal Data: 01.07.19-.30.06.20 Music fan: 167; Average 3.7K

ENGAGEMENT WITH PODCASTS

(numbers in red highlight where they are more likely to have or do compared to average)

Teens who listen to music on YouTube are more likely to listen to Podcasts about:

1. **Comedy (12.7%)**
   -Average for 14-18s= 13.0%
2. **Music (10.3%)**
   -Average for 14-18s=7.9%
3. **Games & Hobbies (6.6%)**
   -Average for 14-18s=6.0%
4. **Education (6.4%)**
   -Average for 14-18s= 5.7%
5. **TV & Film (5.1%)**
   -Average for 14-18s= 3.7%

Kids aged 14-18 who listen to music via the following platforms are more likely to listen to podcasts about....

Teens who listen to music on Spotify are more likely to listen to Podcasts about:

1. **Comedy (14.5%)**
   -Average for 14-18s=13.0%
2. **Music (8.0%)**
   -Average for 14-18s=7.9%
3. **Education (6.8%)**
   -Average for 14-18s= 6.7%
4. **Games & Hobbies (5.5%)**
   -Average for 14-18s= 6.0%
5. **Sports & recreation (4.1%)**
   -Average for 14-18s= 3.6%

41% of YouTube music listeners listen to podcasts (45% average) and whilst comedy is favoured, they over-index on music and TV & Film. 40% of Spotify music listeners also listen to podcasts and they too favour comedy although more than average. They are less interested in Games & Hobbies than YouTube listeners but are more into sports and recreation.

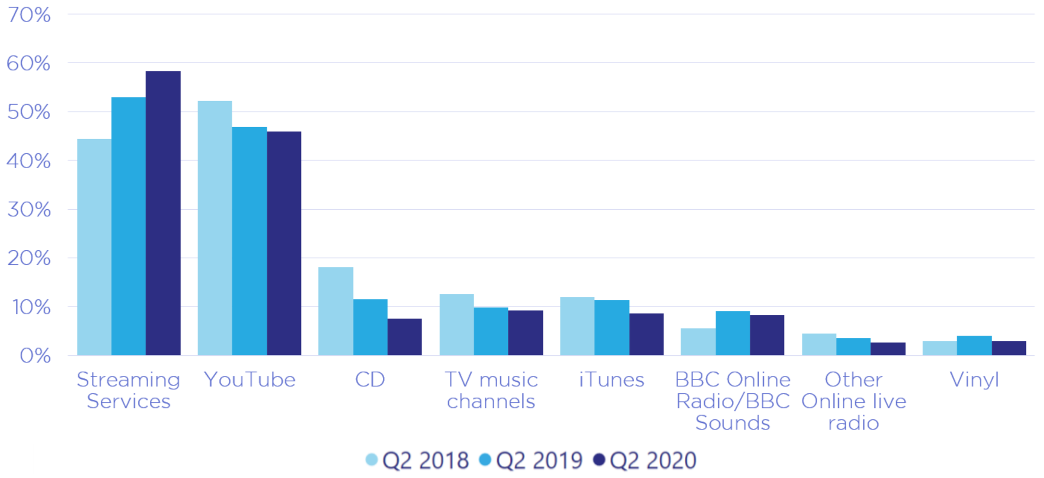
Based on Portal Data: 01.07.19-.30.06.20 Music fan: 167; Average 3.7K

MUSIC FANS HAVE VARIED INTERESTS, BUT HOW DO CHILDREN ENGAGE WITH MUSIC TODAY?

LISTENING HABITS

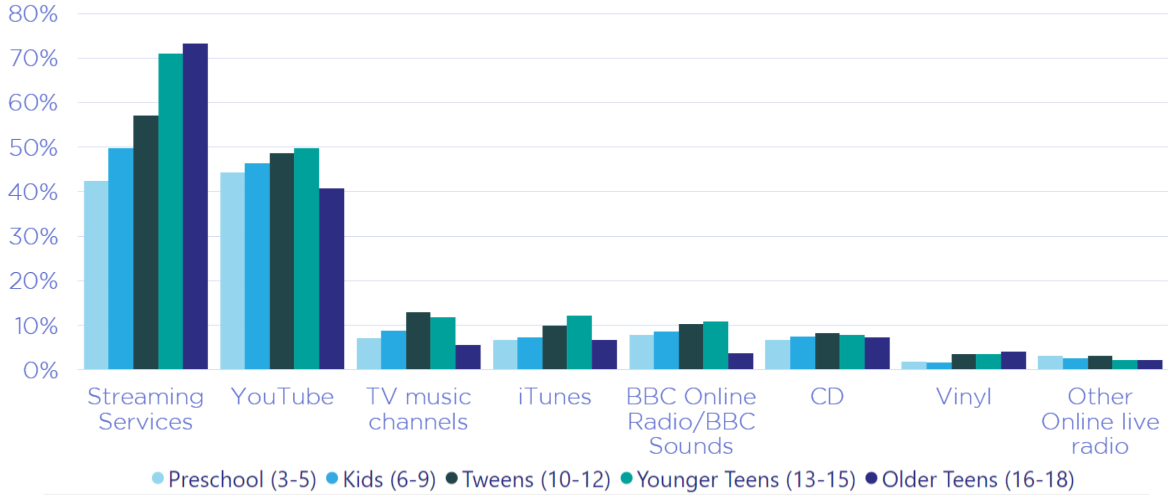
TOP MUSIC LISTENING PLATFORMS (OVER TIME)

"How do you listen to music?" (streaming platforms grouped, 3-18s, N=6,676)



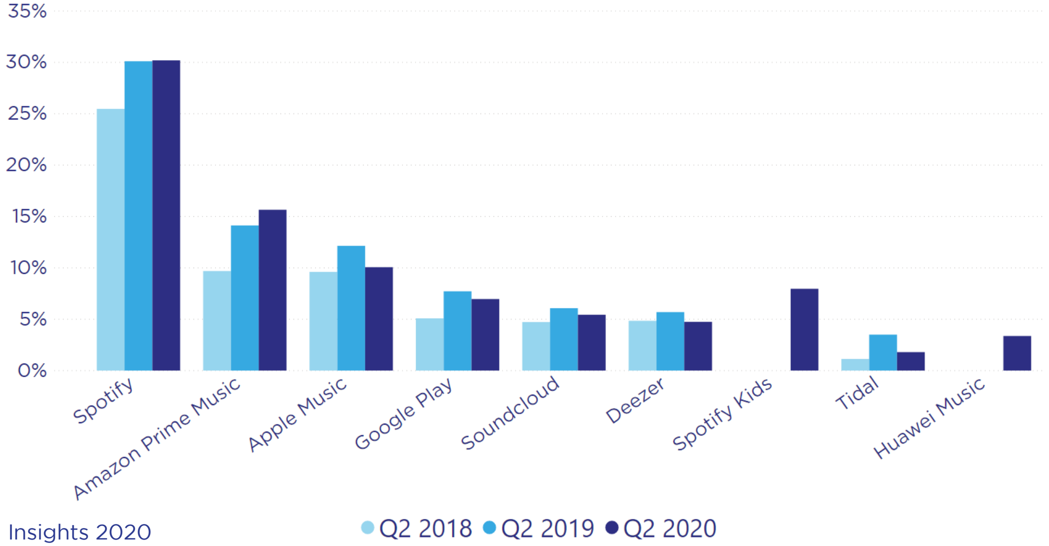
TOP MUSIC LISTENING PLATFORMS (BY AGE)

3-18s, Q2 2020, N=2,392



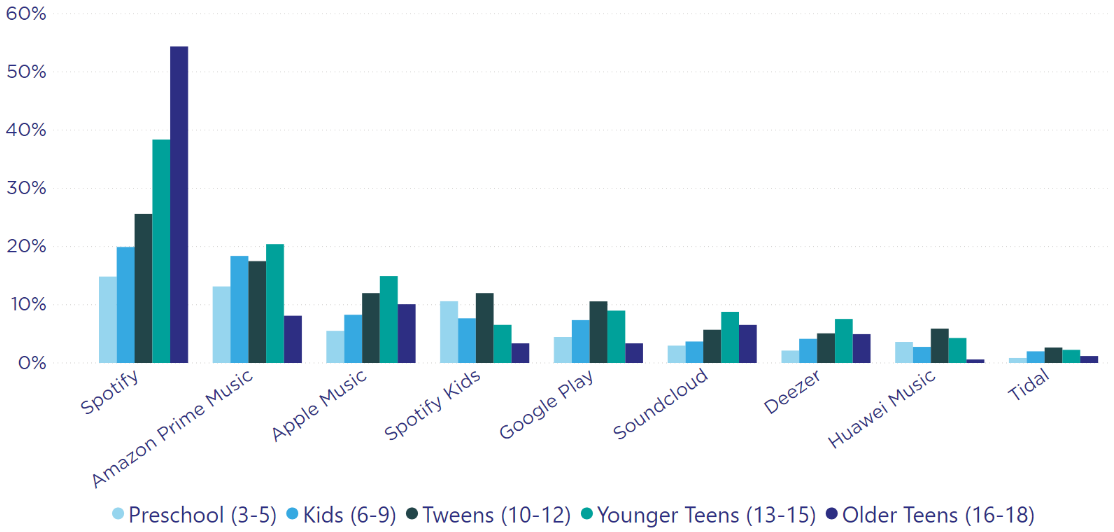
TOP 10 STREAMING PLATFORMS (OVER TIME)

"How do you listen to music?" (streaming platforms only, 3-18s, N=4080)



TOP 10 STREAMING PLATFORMS (BY AGE)

3-18s, Q2 2020, N=1,592



kids INSIGHTS

LISTENING HABITS

DEVICES FOR MUSIC LISTENING

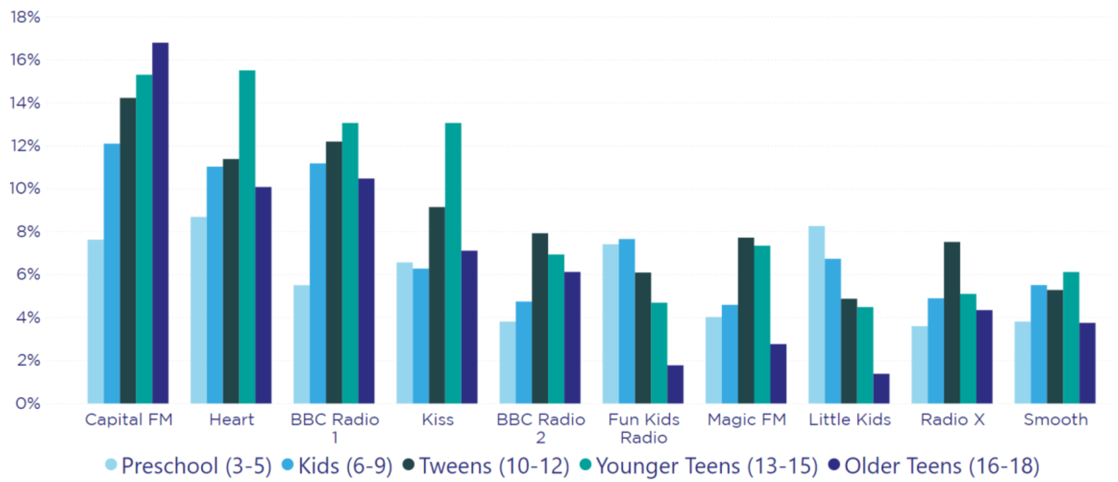
"What do you use your devices for? (music)" Q2 2020

	Tablet	Mobile	Smart Speaker	TV
3-12s	21%	18%	18%	11%
13-18s	17%	46%	24%	13%

The devices children use to listen to music largely mirror the ones they have access to, with tablets most popular amongst the 3-12s, followed by smartphones in teenagers. The number of kids listening to music via a smart speaker has increased by over 50% since the beginning of 2019.

TOP RADIO PLATFORMS (BY AGE)

"Which have you listened to this week?" Q2 2020



An average of just over 7 in 10 children aged 3-18 listen to one of the radio stations listed (top 10 only displayed above). Interestingly, the top five stations are the same across both genders, showing universal appeal. Amongst boys., the popularity of BBC Radio 1 increases with age, whereas with girls it falls.

... AND WHO DO THEY LISTEN TO?

WHAT NEW MUSIC HAVE YOU BEEN LISTENING TO?

'New' as defined by the respondent and therefore includes music new to them

GEN ALPHA (Ages 3-9)

#	NAME
1	Little Mix
2	Ed Sheeran
3	Pop
4	Ariana Grande
5	Billie Eilish
6	Justin Bieber
7	Disney
8	Taylor Swift
9	Dua Lipa
10	One Direction
11	Selena Gomez
12	The Weeknd
13	Adele
14	Queen
15	BTS

#	NAME
16	Trolls
17	YouTube
18	Bruno Mars
19	Drake
20	Nursery Rhymes
21	George Ezra
22	Baby Shark
23	Coldplay
24	Katy Perry
25	Marshmello
26	Stormzy
27	KSI
28	Rita Ora
29	Tones and I
30	Michael Jackson

GEN Z (Ages 10-18)

#	NAME
1	Billie Eilish
2	Dua Lipa
3	Ed Sheeran
4	Pop
5	Ariana Grande
6	Lewis Capaldi
7	Stormzy
8	KSI
9	Rap
10	Adele
11	Lady Gaga
12	Little Mix
13	The 1975
14	Rock
15	Drake

#	NAME
16	Harry Styles
17	Justin Bieber
18	Doja Cat
19	BTS
20	Jazz
21	Rihanna
22	Travis Scott
23	Oasis
24	Imagine Dragons
25	Coldplay
26	K-pop
27	Grime
28	The Weeknd
29	Panic! At The Disco
30	Taylor Swift

Kids Insights UK | Q2 2020 | Gen Alpha = ages 3-9 (n= 1.1k) | Gen Z = ages 10-18 (n= 1.5k). Open ended responses

SPOTIFY BETS BIG ON PODCASTS

Four in ten kids are listening to podcasts in Q2 2020, a rate that has increased by 10% since the Coronavirus lockdown (late March 2020).

Podcasts are listened to equally by both genders, but the number increases gradually with age (peaking at 54% of 18-year-olds).

Podcasts have surged in popularity in general over the last few years, and a recent move by Spotify (used by 30% of kids) shows they want to become the go-to platform in the future. An estimated $600 million has been spent by Spotify on additions to their podcast networks, including Gimlet Media and the Ringer.

In May, it was announced Spotify paid an estimated $100 million to exclusively host one of the most popular podcasts worldwide, The Joe Rogan Experience. While Joe Rogan's content is typically for adults (though he's mentioned inside the top 50 favourite YouTubers for kids) the move signifies Spotify's intentions in this space.

At the younger end of the spectrum, it was also announced that Spotify is to stream podcasts featuring DC superheroes, such as Batman, Wonder Woman and Superman as the narrators.

With over 121.9k kids anticipating the release of new DC films in the UK, this move signifies Spotify's intentions to reach wider audiences and demonstrates how podcasts are now an important component of building a brand ecosystem.

BRANDS IN THE AUDIO SPACE

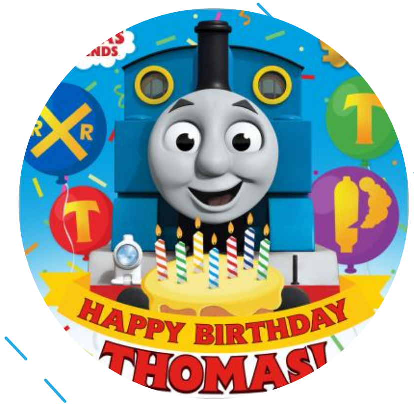
music:)ally

Prepared by Music Ally

MUSICAL YOUTH

From Fortnite concerts and TikTok challenges to YouTube nursery rhymes and Roblox music-making games, the music industry's engagement with young people is finding some creative digital outlets

Children's Labels Evolve



Recent announcements include a partnership between Universal Music and Lego to develop a new range of Lego products that will go on sale in 2021. Details of the products (and the identity of any artists involved) will be revealed later this year.

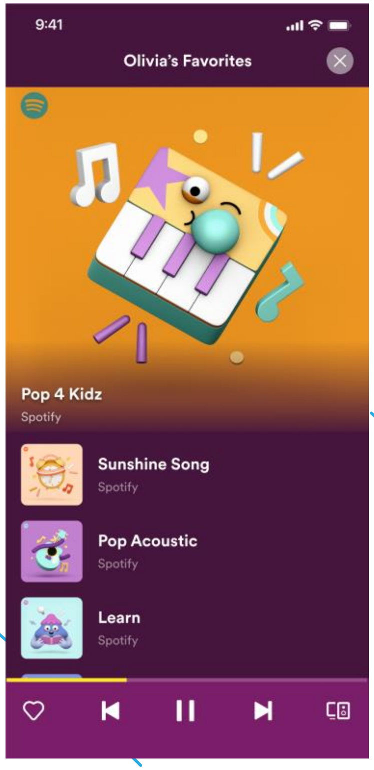
Warner Music Group has also recently struck a partnership with a key company in the kids space: Mattel. WMG's Arts Music Division is the exclusive distributor of Mattel's catalogue of more than 1,000 songs, from brands like Barbie, Thomas & Friends and Hot Wheels.

In May, the partnership yielded a new 'Happy Birthday, Thomas' album. It was the latest deal for Arts Music, following agreements with Fred Rogers Productions for the TV show Daniel Tiger's Neighborhood, and a partnership in 2019 to launch a dedicated label for children's brand Build-A-Bear Workshop.

Sony Music UK, meanwhile, has its Magic Star children's music label, which launched in October 2019 to release original music, and also to partner with other labels and their artists within Sony Music.

It's the home to artists including 44 Cats, Yolanda Brown and Andy and the Odd Socks, while its most recent signing is a partnership with retailer Smyths Toy Superstores – its animated mascot Oscar.

Having already adapted Beyoncé's 'If I Were a Boy' for a Smyths ad campaign ('If I Were a Toy') Oscar will be releasing an album through Magic Star.



Spotify for the Kids

Even though Spotify has been offering its family subscription for years, the theoretical minimum age for an account was 13 years old – even if many parents ignored that.

In October 2019, Spotify launched a separate app for under-13s: Spotify Kids. Initially available as a beta in Ireland, it has since rolled out more widely: to Denmark, Sweden and New Zealand that November; the UK and Australia in February 2020; and the US, Canada and France in March.

Developed in Spotify's newest 'tech hub' in London, the app has no advertising; requires a family plan account; and features music and audio chosen by a team of curators.

It's split between 'Audio for Younger Kids' and 'Audio for Older Kids' – singalongs, lullabies and soundtracks for the former, and tracks and playlists for the latter.

In May 2020, Spotify added features for parents to see what their children have been listening to, and to block individual songs or stories – although the white-list approach should mean age-inappropriate content doesn't appear anyway.

Fortnite's Music Moves

This report has already referenced Travis Scott's performances in Fortnite as a key moment for that title's expansion beyond gaming. The sheer scale of the audience for Scott's 'Astronomical' continues to have the music industry buzzing.

Scott's pre-recorded performance was turned into what was essentially an animated, interactive music video.

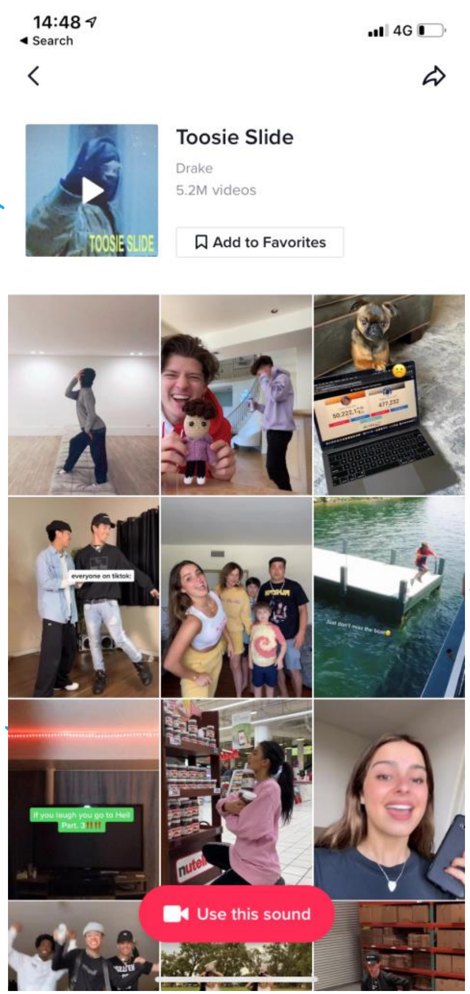
Fortnite players couldn't affect what was happening, but they could move around as a giant Scott stomped across the landscape, floated in space and dived underwater during his medley of hits.

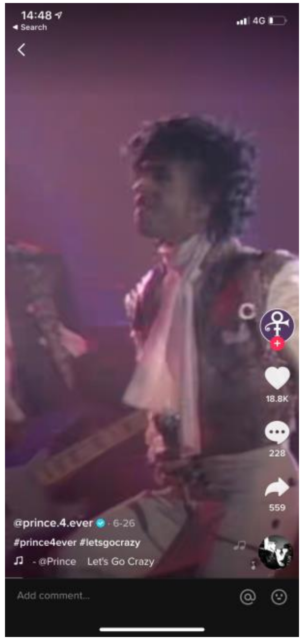
12.3 million fans attended the first of the five performances, which were scheduled at different times over three days to reach as wide a time zone spread as possible.

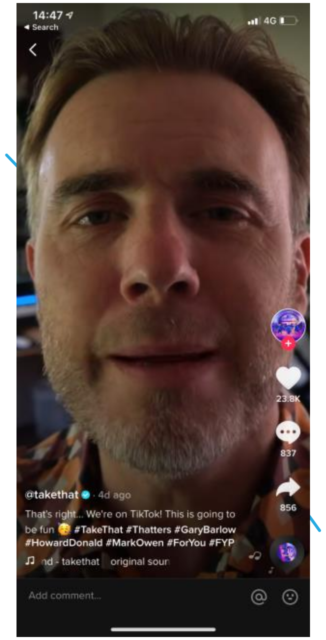
Over the full run, 27.7 million unique participants showed up – a figure that does not include millions more who watched streams of the event by their favourite gamer influencers on platforms like YouTube and Twitch.

The concert was followed by the launch of Fortnite's new 'Party Royale' mode, complete with a 'Main Stage' music venue that has already hosted DJ sets from Diplo, Steve Aoki and Deadmau5.

Musicians on TikTok







Thus far, TikTok's main superpower for the music industry has been in the videos made by its young users, which use music clips as their soundtracks.

However, as the platform has grown, artists and labels have also started using it more actively themselves.

The last year has seen artists including BTS, Justin Bieber, Halsey, Maluma, Take That, Christina Aguilera, Carrie Underwood, Will Smith all sign up for TikTok, while in June 2020 the late star Prince also got an official profile, as part of a wider licensing deal with his estate.

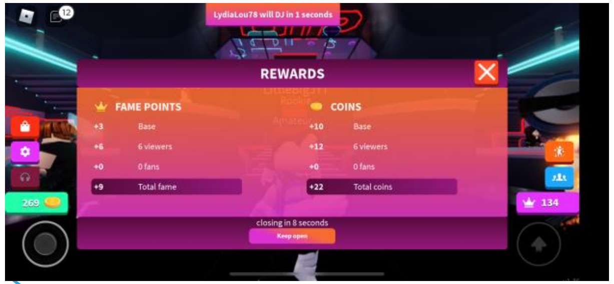
The traditional pattern for songs going viral on TikTok has not involved artists or labels. Often a creative dance or idea by a TikTok creator gets traction, sparking a wave of other clips as their peers jump on the bandwagon.

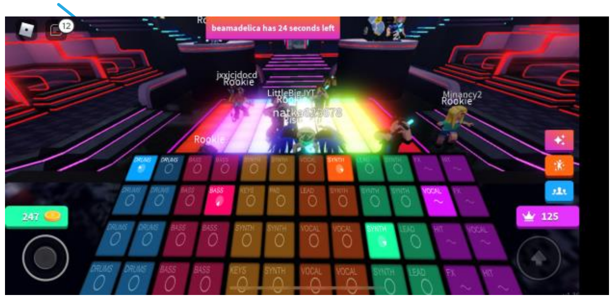
In 2020, we've seen more campaigns to kickstart this kind of virality on behalf of artists. Drake's 'Toosie Slide' track in early April was a prime example.

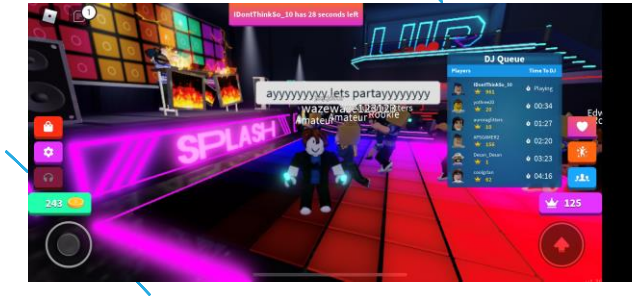
Some prominent influencers were enlisted to create a dance for the track, and within a couple of weeks of its release, videos featuring the song had generated more than 2.8bn views on TikTok.

Manufacturing virality is a hit-and-miss task, but labels realise that working with TikTok's creative community gives them the best chances of sparking a craze.

Splash on Roblox







Gaming platform Roblox has more than 120 million monthly active users, and more than two million people making games for it. One of the most intriguing games launched recently for Roblox is focused on music.

Splash Music Maker is the work of Australian startup Popgun, whose core business is building technology for artificial intelligence (AI) created music. The beats and loops created by its system form the core of its first Roblox game.

It takes the form of a virtual nightclub, where children can DJ from its stage and show off their moves on its dancefloor – the twist being that all the music is created on the fly, using Splash's system of virtual pads to trigger the musical elements.

As with the separate Splash mobile app, every single sound has been created by AI, but it's humans – children in the case of Roblox – who are putting them together to make music.

The game launched in May 2020, and by mid-July had notched up more than 8.4m visits, with more than 178,000 Roblox players having marked it as a favourite.

Popgun's CEO, Stephen Phillips, thinks games like this could be the place where the artists of tomorrow get their first experience of creating music – and showing it off to audiences of their peers.

Cocomelon on YouTube

The first ever YouTube channel to generate more than 1bn views in a single week was a music channel, but one that has flown under the radar for the music industry.

Cocomelon has been on YouTube since 2006, with a catalogue of animated nursery rhymes for children. 14 years on from that launch, it now rivals Indian music firm T-Series as the biggest channel on YouTube.

The Covid-19 lockdown – with schools shut across the world for months – has played a significant role, but Cocomelon was already big: in early March it was generating more than 600m weekly views.

Its weekly total topped 1bn for three consecutive weeks in May, with its biggest hits including 'Bath Song', 'Yes Yes Vegetables' and traditional favourite 'Baa Baa Black Sheep'.

Animated nursery rhymes have long been one of YouTube's most popular categories, and that's even more the case in 2020. Recent analysis by Music Ally found that in a single week in mid-June, the ten biggest nursery-rhyme channels generated 2.7bn views together – and each of them was more popular than the biggest artist channel that week, for K-Pop group Blackpink.

Marshmello Takes Kids Raving

US dance star Marshmello was the first artist to play a concert in Fortnite: his February 2019 performance attracted 10.7 million people.

He's also built a successful YouTube channel, with more than 46 million subscribers attracted by his music videos, as well as his forays into gaming and cooking.

Marshmello's latest venture is focused on children. Mellodees is a new brand in the same space as Cocomelon (see previous page), offering animated nursery rhymes for preschool kids.

Active on YouTube, TikTok and Instagram among other social platforms, Mellodees' first video – 'ABC's Song' – was released in July 2020, with an audio version for streaming services and download stores.

Its website also offers downloadable colouring pages for children, featuring the Mellodees characters. While it starting with nursery rhymes there are plans to expand into original music, and clear potential for merchandise and cartoon spin-offs in the future.

Nick Cope: The New Kids Star

British music fans of a certain age may know Nick Cope for his role as frontman of indie band The Candyskins, who released four albums in the 1990s, and had a top 40 hit with their single 'Monday Morning'.

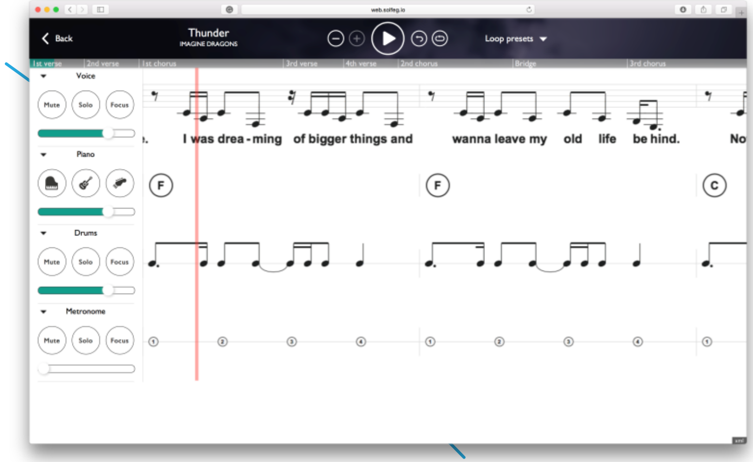
Preschoolers in 2020 almost certainly won't know The Candyskins, but it's quite possible they'll be able to sing along with 'The Baby's Done a Poo'. That's just one of the tracks recorded by Cope in his more recent career making music for children.

He's released a series of albums, from 2009's 'What Colour Is Your T-Shirt?' to 2018's 'Have You Heard About Hugh?'. Since 2011, he's also put some of his songs on YouTube with animated videos.

In 2020, Cope starred in a TV show made for the BBC's preschool channel CBeebies. The 14 short-form episodes of 'Nick Cope's Popcast' offered a similar mix of animation and music.

Cope isn't the only 1990s musician to follow this path. Chris Ballew, whose Presidents of the United States of America band's hits included 'Lump' and 'Peaches', has released a steady flow of children's music albums under the moniker Caspar Babypants. Another US band, They Might Be Giants, also released several albums for kids.

Education, Education, Education



The role that music plays in educational curricula is an important debate, including in the UK. Research published by the BPI in March 2019 warned that state schools were falling behind independent schools in giving their pupils the opportunity to participate in music.

The body called for government investment to tackle this problem, and 2020 has brought good news on that front: an £80m investment in music hubs by the government in January, and work beginning on a new National Plan for Music Education, due to be published in the autumn.

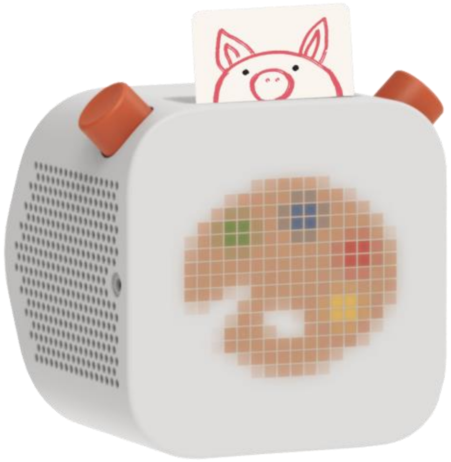
New technologies and startups may be able to play a role in the UK and elsewhere. One such startup was a winner of the Midemlab competition in June.

Latvian startup Solfeg.io has developed software teaching children how to play music, using a catalogue of licensed songs, and a model where teachers and pupils can use it for free, but can also pay a monthly subscription for more features. At the height of the Covid-19 pandemic, more than 2,000 schools a month were signing up.

Music education is an exciting startup category already, from established instrument-teaching apps like Yousician and JoyTunes, to newer firms like Skoove, Big Ear Games, MusiClock and Musopia.

While publishing is the first licensing port of call for these startups, there may be opportunities for labels too, for music education apps that want to use master recordings.

Yoto Speaker's Family Mission



As this report has explained, there has been sharp growth in smart speaker ownership for children and teenagers over the last two years: 17% of 3-12 year-olds and 29% of 13-18 year-olds now own one of these devices, up from 3% and 6% respectively in 2018.

For parents of younger children who are not yet comfortable with the idea of a connected smart speaker in their child's bedroom, there are also options.

British startup Yoto, which was founded in 2017 by Ben Drury, the former CEO of digital music company 7digital, is one example.

Its product, also called Yoto, is a £79.99 "carefully connected speaker" designed to deliver music, stories, podcasts and radio for children, without causing privacy headaches.

It uses a system of physical 'cards' to deliver content, which parents can buy from Yoto's online store. Those include music albums, from 'My First Beethoven Album' to 'Swan Lake', as well as stories from authors including Roald Dahl, Julia Donaldson and Judith Kerr.

Yoto's competitors include Toniebox, which uses physical toys ('Tonies') instead of cards, with Disney, Fireman Sam and The Gruffalo among the brands, plus lullabies and nursery rhymes in its music category.

THE FUTURE

Life after Lockdown and Beyond

REBIRTH OF FAMILY TIME

There is a growing desire to spend quality time together as a family.

Home confinement, home schooling and home working will without doubt cause many stresses within family life, but what we are seeing from our data is a growing desire to spend quality time together as a family. This desire is contributing to much more mutual understanding of kids and parents' lives.

Kids have witnessed what it means to be part of a parent's workday – how many have been introduced to colleagues over video conferencing? They are getting a glimpse into their parents' professional network and 'meeting' people their parents spend their working life with often for the first time.

Likewise, parents are having to take on the role of a teacher to many kids which brings about a better understanding of the school curriculum and deepens the connection with a world they may only get a very brief insight into on occasion.

Despite having to juggle multiple tasks and emotions throughout the day, our data doesn't suggest parents and children are being 'lazy' or looking for the easy option. They are instead actively seeking out opportunities to spend quality time together as a family.

AS A RESULT WE HAVE ALSO SEEN THE FAMILY UNIT BECOME MORE DEMOCRATIC

Kids' influence over in-home purchases has increased during lockdown

Item	Toys	Takeaway food	Board Games	Video games	TV subscriptions	Music
Increase in influence	+3% (81%)	+4% (76%)	+7% (70%)	+6% (70%)	+10% (68%)	+8% 64% of kids influence music choice in the home

% based off a little or a lot of influence
Portal Data: 01/08/19-29/02/20 vs 01/03/20-31/05/20

TAKE ME TO ANOTHER DIMENSION

There will be a definite and undeniable need and want, especially for children, to experience the 'real' physical world again, more so than ever before.

But children have become used to the immersive nature of the digital/virtual worlds, so how will they adapt?

The next phase of the internet can be described as the 'Metaverse' - a shared virtual space that is always open, with its own activities, such as shopping and entertainment all built in.

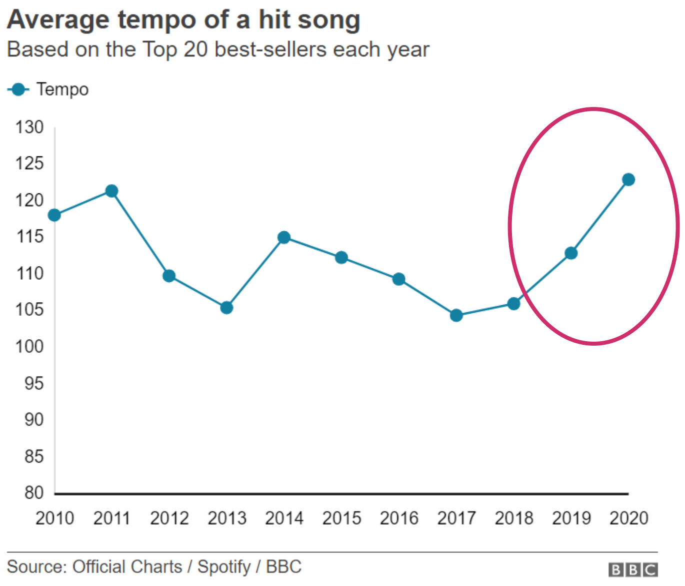
Over the last two years, the most popular video games are ones that hold some characteristics of this – enabling kids to play, explore and create in open worlds

Although a fully realised metaverse in virtual reality may be years away, IP owners and tech platforms are already partnering up and shaping the future. Warner Bros are the latest company to collaborate with Fortnite by screening their movies in game, while Disney have partnered with both Roblox and Fortnite in the past.

There are a growing number of exciting opportunities for brands to collaborate, integrate their content and think outside the box when it comes to the metaverse. However, brand activations need to be natural, not intrusive and add value to the community.

Children at the moment have no option but to live in a virtual world, but will the need to live in the real world win through as lockdown ends?

ESCAPISM & OPTIMISM CAN HELP MENTAL HEALTH



Pop music is getting faster (and happier) BBC – 9th July 2020

During lockdown we have seen an increase of children feeling anxious, across all ages.

Across the last 3 months 61% of children 3-18 said they felt anxious at least some of the time, rising to 11% all the time. This compares to a yearly average of 54%, and 8% feeling anxious all of the time.

Furthermore, concerns teens are having over their mental health has increased from 20% to 33% over the last year.

We have also seen an uplift in the number of children seeking out escapist content. When looking a the types of books children want to read, we have seen a 44% uplift since lockdown began in those preferring the fantasy genre and a 10% increase in preference for comedy books.

Going forwards there is going to be even more emphasis on ensuring that we help children overcome their concerns and help improve mental health and we foresee there to be a rise in mindfulness, meditation and self-help apps for this demographic. But what better way to lift a mood than music?

In fact, BBC recently published a study which finds that pop music, over the last year especially, has become happier and more upbeat. *"The charts are suddenly crammed with pop songs that celebrate joy and sensuality and precipitous thrill: Dua Lipa's Physical, Doja Cat's Say So, Harry Styles' Watermelon Sugar and Gaga's own Stupid Love"* says Mark Savage.

Will this mean, as we navigate our way out of the pandemic and back into the real world, a need for more uplifting and mood enhancing entertainment will prevail, for the short term at least?

KEY TAKEAWAYS

KEY TAKEAWAYS: TECHNOLOGY AND PLATFORMS

- This generation of children have easy access to devices and technology from a young age, and this is giving kids an opportunity to **control what content they consume, who they influence and how they behave.**
- Two-thirds of 3-5s own their own tablet and new technology is rapidly emerging, with smart speakers growing by almost 300% since late 2018.
- As a result, kids' attention is increasingly fragmented across new platforms – such as TikTok, Twitch, Discord, Houseparty and Reddit. Fragmentation means it's hard to reach mass audiences, **but music brands can utilise these platforms to foster more niche communities.**
- These platforms are creating a **new set of influencers** – such as KSI and Ninja.
- These platforms and influencers are shaping music habits. YouTube is the most-used platform overall to listen to music, but by the time kids reach the age of 16-18, Spotify leaps into first place with over half of older teens using the platform in the UK.
- But listening habits continue to evolve, with TikTok and video games **driving significant changes as to how kids consume and listen to music**.
- Often songs with catchy dances, parodies or funny scenarios become the most popular. Drake's latest hit – Toosie Slide – features an easily copied dance routine designed to go viral on apps like TikTok.
- During lockdown, the definition of a 'video game' is beginning to shift as Fortnite continues its evolution into a media platform.
- Other games, such as Minecraft and Roblox are also **providing spaces for virtual entertainment.**

*UK

KEY TAKEAWAYS: CHILDREN AND MUSIC

- Despite all the ‘noise’ within kids’ ecosystems music still has an important role to play.
- Music becomes most important as children become teenagers and it is then when they spend a greater proportion of their day listening to music.
- However, it is the younger age groups that are more likely to be involved in music clubs and for parents it is a key activity to do with their child to aid child development.
- Music is a favourite subject at school for youngsters in particular where learning is still very play orientated and this translates into future aspirations. 3-9s who class listening to music as a favourite hobby are more likely to base future professions around music.
- Those who count listening to music as a favourite hobby are emphatic in their love of music and it bleeds into other areas of their lives with music being a favourite subject at school and future career choice.
- Audio consumption is on the rise thanks to advancements in technology and increased access and ownership of devices, blending mediums that would have otherwise sat in their own distinct space.
- Consider redefining the term audience, as this generation of kids are not content to merely passively consume, they want to co-create, personalise, co-syndicate as advocates and even “business partners”
- Communicating via just one medium isn’t enough, building an ecosystem across multiple media touchpoints is essential to boost engagement.

KEY TAKEAWAYS: LOOKING AHEAD

- The world has changed over the last few months and it goes without saying that regardless of the age of the child, this period of enforced lockdown, will be an extremely stressful and traumatic time for them.
- We can't predict the future, nor do we even know how long and therefore how damaging this period of lockdown will be. But what we do know, from the continuous tracking on our real time data is the shifts that have begun to shape a child's world today.
- Kids will have more say over household decisions, whether that is the choice of music played in the home, or where they next go on holiday as a family.
- But there is also an increased desire for parents and children to share and appreciate common interests and likes.
- Life after Covid 19 lockdown will mean that there is even less distinction between on and offline worlds. Brands will need a presence in both; the interactive, immersive digital world offered to children and the experiences here will need to extend physically much more so than they ever were before.
- There will be new heroes in society – those that have helped us pull through the crisis and the type of influencers children look up to will change. It is no longer enough to be a just a 'persona', role models need to have purpose and stand up for values to which children aspire.
- Uplifting and mood-enhancing entertainment will become important as the world gets back to normal and brands that can help facilitate this will win through in the short term at least.

METHODOLOGY

OUR METHODOLOGY

The solution Kids Insights has developed is fully compliant with legislation and is completely independent and data agnostic.

We are surveying children continually, and every week we are surveying c4,000 different children across 11 countries (or c200k a year).

We undertake two, 15-minute surveys through respected online panel providers that are GDPR, COPPA and MRS compliant.

Therefore, all our clients have access to the unique real-time portal that puts users in control of the data, giving the ability to view, filter and interrogate it to their specific requirements, including age, gender and regions of the target audience.

Survey 1

1

Focuses on kids digital ecosystems, identifying the latest trends on kids attitudes to their digital worlds, identifying their digital behaviour and consumption to identify the latest trends.

Survey 2

2

Focuses predominately on kids non-digital lives, such as hobbies, interests an what products they are purchasing and consuming.

GET ACCESS TO THE REAL-TIME DATA PORTAL & DOWNLOAD COMPLIMENTARY REPORTS

KIDSINSIGHTS.COM/BPI