

mipjunior®



THE
**INSIGHTS
FAMILY®**



TWEENS: THE OVERLOOKED GENERATION



SETTING THE SCENE

TWEENS: THE OVERLOOKED GENERATION

Why is it that despite having access to every bit of content in the palm of their hands; tween audiences, or those aged between 10 and 12, are finding it harder and harder to seek out content that is relevant to them?

Is it because it doesn't exist or is it because the content doesn't resonate fully?

With the ever-increasing digitalisation of kids ecosystems, and the rise of Netflix, YouTube, TikTok and video gaming – one thing is increasingly clear when it comes to content:

TWEENS ARE AN OVERLOOKED GENERATION.

I have worked in the media industry for over 20 years but I have never witnessed a time where the kids ecosystem is moving so quickly - or been so connected.

Children have a limited amount of leisure time each day and the expanding opportunities open to them via digital platforms means that content needs to stand out even more to capture their attention. And as technology increasingly blurs the lines between sectors, (I mean, where is the line between a video game or a social media platform now?) it's imperative that we consider the whole kids ecosystem as one.

Gaming and a move towards the digital Metaverse - a world where anything is possible and opportunities are endless - has further put pressure on the content industry. How can a TV programme compete in a world where a child can create their own narrative? The good news is watching TV still dominates leisure time, but who tweens are engaging with is harder to establish with a lack of new characters or role models from the content world breaking through and resonating directly with this key age.

At The Insights Family we believe in giving kids & families a voice to create a better world, better life and a brighter future. We speak to more than 383,000 kids, tweens and teens every single year, as well as more than 187,000 parents. Our 'always on, real-time' approach means we can quickly identify the changes that are happening in their world and how they react to them.

So how do we communicate with this tween audience?

What matters to them?

And crucially, how can we make content that will engage and resonate most?

But first why is this age group so important? Why should we pay attention to Tweens today?



SARAH RIDING

Research & Trends Director,
THE INSIGHTS FAMILY

A QUARTER OF A BILLION REASONS WHY YOU SHOULD TAKE NOTICE OF TWEENS

According to our estimates, there are just under a **quarter of a billion tweens** aged 10-12 in the world.¹ This market cannot be ignored.

Not only do Tweens make up a vast audience, but they also have significant influence in household decisions, and therefore they are key demographic for advertisers.



The Global Toy Industry was worth \$90bn in 2019:
Kids influence \$77bn of this spend (86%)²



The Global Music Industry is worth \$62bn in 2021:
Kids influence \$41bn of this spend (66%)³



The Global Book Publishing Industry is worth \$93bn in 2021:
Kids influence \$71bn of this spend (76%)⁴



The Global gaming market is worth \$162bn in 2021:
Kids influence \$117bn of this spend (72%)⁵

As families spent more time together in 2020, tweens' power over decision making within the home has continued to surge. Of the categories we measure kids' influence, tweens claiming they have "a lot" of influence over purchase decisions has increased by an average of 17% over the last twelve months. It's clear the household is becoming a democracy, and tweens are playing a large role in this.

We also know that from tracking our data over time that loyalty formed in early years tends to continue as kids age up if the right connection is made. As an example, in the UK, the YouTuber DanTDM's audience peaked at 9 years old in 2018 – today his main fanbase is aged 11 – his fanbase has grown with him. The same pattern can be seen with other favoured brands including The Simpsons, Netflix and Minecraft – form an authentic connection with a young age group from the early years and you can secure a fanbase as they move through adulthood and beyond. Content, platforms and entertainment which can draw in this key, influential audience will see themselves in a strong position for the future.



Kids Insights Data: Europe (5 markets) – April to July 2021*
1 UNICEF
2 Statista
3 Statista
4 The Business Research Company
5 Statista

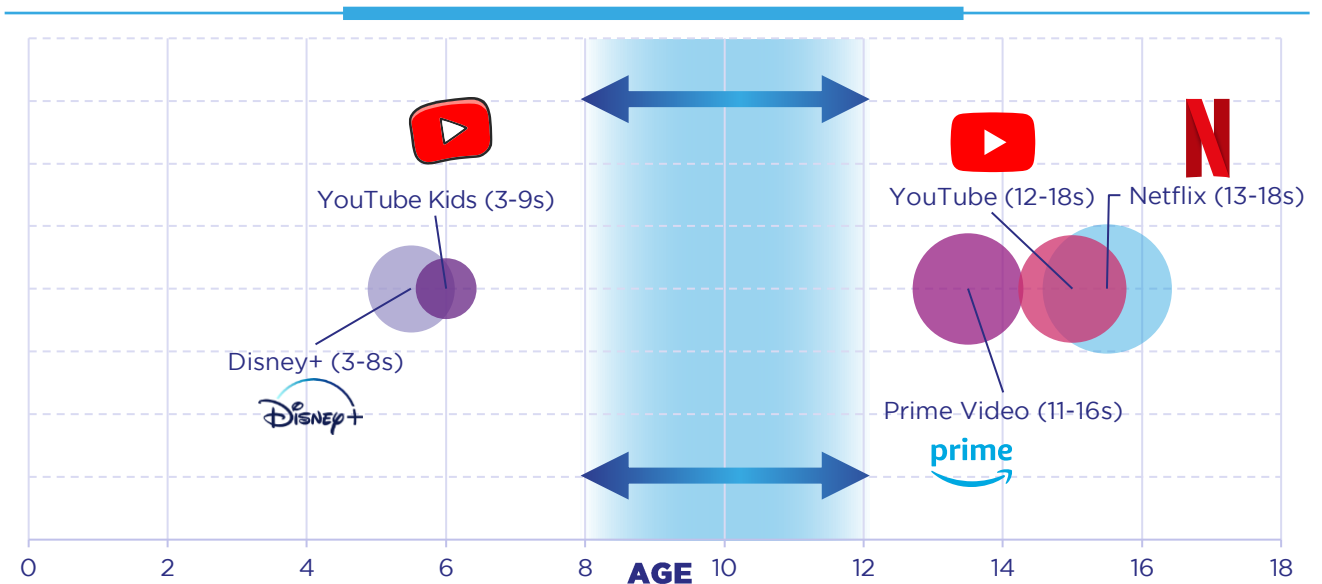
THE PROBLEM & OPPORTUNITY

A CONTENT GAP

There is a significant gap where this group of kids are not being catered for.

While YouTube Kids and Disney+ caters for younger audiences, Netflix, YouTube and Amazon Prime Video are all most popular with older children, creating a vacuum for content specifically designed for the tween demographic.

POPULAR PLATFORMS, CONTENT AND ENTERTAINMENT BY PEAK AGE



6-9s

Roblox
Iron Man
Disney Plus
Pokémon
Mario Kart
LOL Dolls
Spiderman
Barbie



10-12s

Harry Potter
Fortnite



13-16s

BBC iPlayer
Netflix
FIFA
TikTok
Instagram
Snapchat
Loki
YouTube
Facebook
NERF Toys
Star Wars
Batman
Board Games
Stranger Things
Amazon Prime
Minecraft

DEFINING A TWEEN TODAY

A CRITICAL PHASE IN THEIR LIVES

By the time children reach the age of 10 they are becoming much more independent, breaking away from their parents and becoming more focussed and influenced by friends who share common interests and passions. **10 is the average age globally where children first own their own mobile phone, and by the age of 12, almost 69% of kids across the markets we study own a mobile or cell phone device.** This means they have access to everything they need in the palm of their hand.

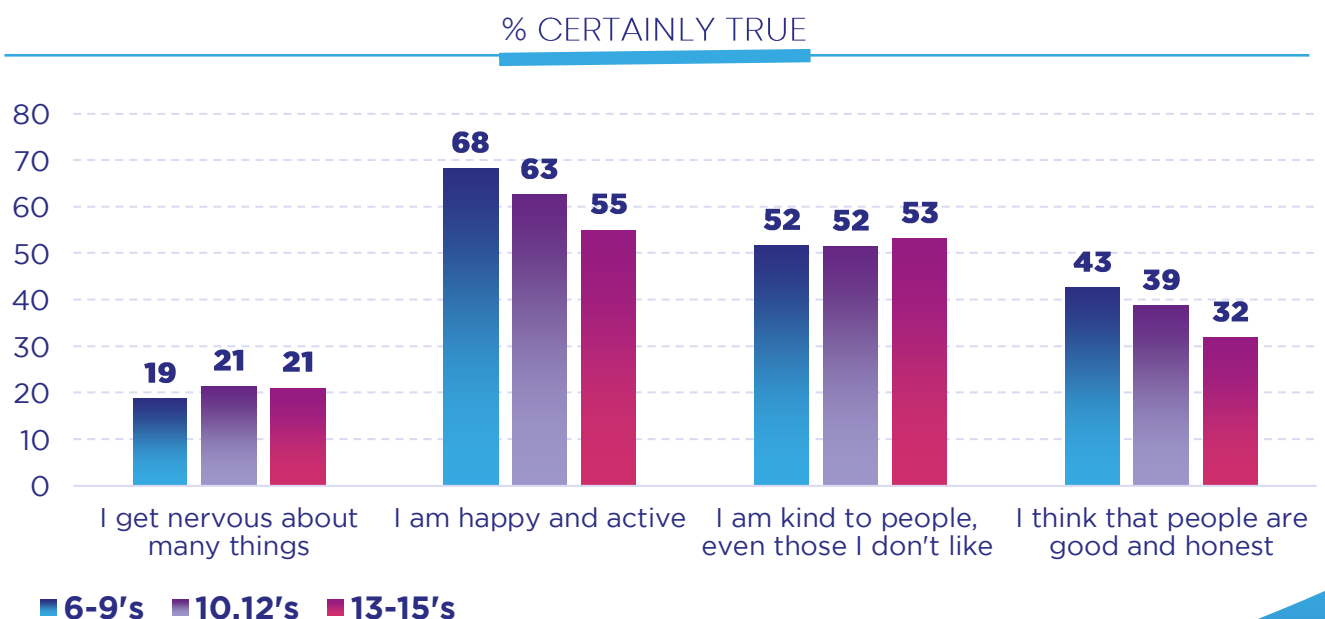
We also know between the ages of 10 and 12 is when parents feel that they would allow their child more freedom, they walk to and from school alone, do homework independently and are responsible for chores within the house.

But this added responsibility and new freedom brings with it some instability – **they are no longer considered, nor feel like kids, and although they desperately want to behave older than they are,** emotionally and mentally they aren't quite ready to age up. This is an age group in flux.

These kids are more conscious of how others perceive them and therefore less likely to enjoy being the centre of attention unless they are fully comfortable. Our data shows that 25% of this age group globally consider themselves to be shy as matters over self-esteem come to the fore.

This age also reacts sensitively to emotional situations, meaning they can easily become stressed or anxious. Feelings of anxiousness start to increase at this age, with 13% of kids globally saying they frequently feel anxious, increasing 26% compared to 6-9 year olds. This means when engaging with content they will relate strongly to characters, seeking out a role model to aspire to and expect 'bad' characters to receive punishment or get comeuppance.

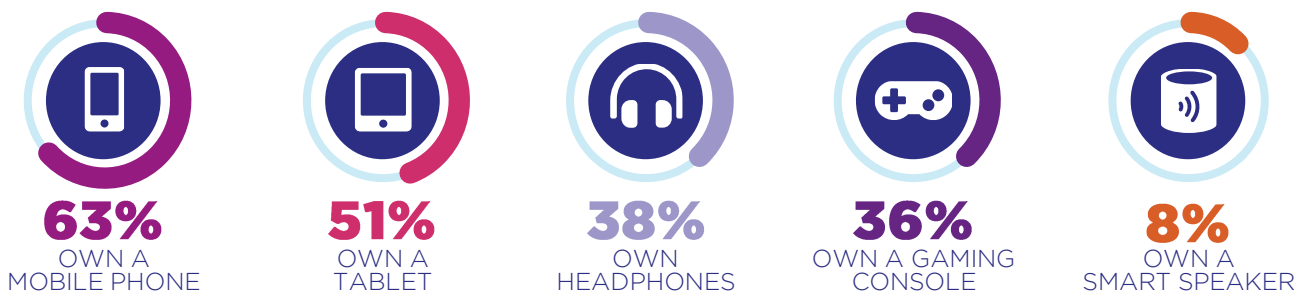
As tweens, they are learning to be more loyal, tactile, and friendly. They are emotion driven and like to help others, they also like to see this in the people they relate to, be it on or off screen.



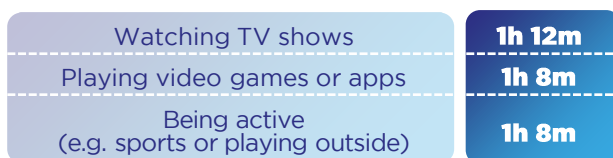
AT A GLANCE

TWEENS IN 2021

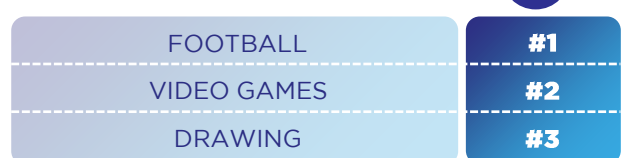
DEVICE OWNERSHIP:



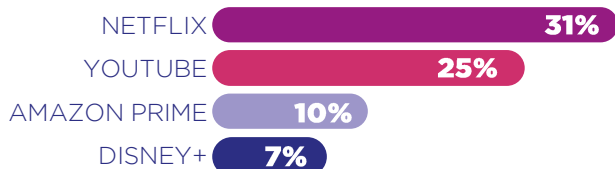
TIME SPENT:



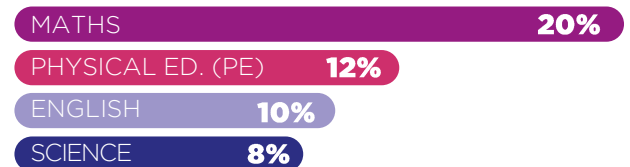
FAVOURITES HOBBIES:



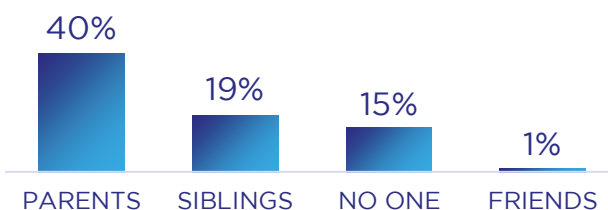
FAVOURITE TV PLATFORM:



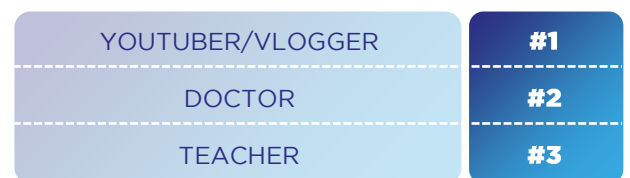
FAVOURITE SUBJECT AT SCHOOL:



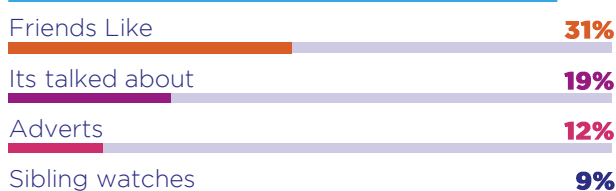
WATCH TV WITH:



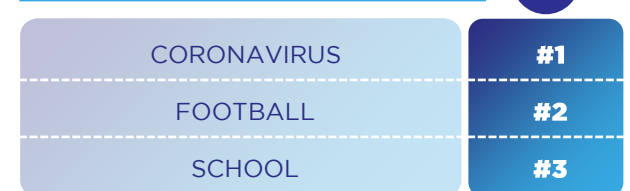
WHAT DO YOU WANT TO BE WHEN OLDER?



WHAT MAKES YOU START WATCHING A NEW TV SHOW:



TALKING ABOUT WITH FRIENDS:



KEY TRENDS & OPPORTUNITIES



HOW DO WE COMMUNICATE WITH TWEENS?



WHAT MATTERS TO THEM?



AND HOW CAN WE ENGAGE?



REDEFINING THE TERM AUDIENCE

This generation of Tweens no longer want to passively consume content, they want to **play a role in the outcome, help shape the direction and make it personal** to them.

Gaming platforms have been a key way to encourage and satisfy this creator mentality and we have seen some great examples of innovation within this space; contributing to increased engagement.

In gaming you are immediately playing something without narrative storytelling, and this has led to a huge growth in user created content. Minecraft and Roblox are the top 2 most favoured mobile games for 10-12s globally; these platforms actively encourage creativity amongst its user base. Roblox for example has so far paid out \$250m to players who create content within the game

The definition of a video game has also shifted. It is no longer a closed experience; they are open worlds with activities such as shopping and entertainment all built in. Often described as the first step towards a 'Metaverse', platforms such as Roblox and Fortnite are now virtual places where individuals, brands, and creators come

together. These platforms provide almost unlimited interactive experiences and stories to be shared with friends.

User-generated content as a source of marketing material is more powerful than ever before, allowing kids greater connectivity to brands they admire.

In the world of TV, we have also seen Netflix experiment with interactive 'choose your own story' episodes, across their Bear Grylls and Black Mirror content, as well as making a recent moving into gaming.

Will we see more content creators utilise Augmented Reality (AR) or Virtual Reality (VR) in the future? Further advancements in technology could be used to enable viewers to control the story and deepen their connections with the characters.

While this technology may still be in its infancy, it is important creators and platforms experiment to stay ahead of the curve and consider: is now the time to redefine the term audience?



"Kids should be part of the 'story'; how they can interact and shape the direction. This can only help deepen engagement and facilitate more personalised experiences.

I think the new offering from LEGO VIDIYO is interesting in this regards. The app incorporates elements of what makes TikTok so popular and combines it with their toys, merging online and offline worlds."

MATT SMITH

Insights Manager,
THE INSIGHTS FAMILY

OPPORTUNITIES IN EDUTAINMENT

Teachers and parents have turned to alternate paths in order to engage kids in their schooling and education as traditional means were disrupted over the last year. These new, mainly digitally focussed alternatives look set to remain and grow as kids' curiosity for the world around them strengthens further.

In France, for example, the popularity of education content on YouTube amongst tweens more than doubled amidst the pandemic, when compared to the school year prior. And, there is no indication that this trend is slowing down. On average, the popularity of educational content on YouTube has increased 88% since last year across YouTube.

Furthermore, the application of new technology to enhance the traditional learning experience will be realised. VR allows educators to travel to different locations in an instant, and even different

times. For example, 1943: Berlin Blitz, a virtual reality experience produced for the BBC, immerses kids in the events of World War 2 to bring their history lessons to life, something not possible in real life.

Augmented reality, on the other hand, has the ability to transform hands-on learning such as in the case of Froggipedia, displacing the traditional dissecting biology lesson through technology. The advantage of these approaches is that parents can get involved to provide their children with these experiences even outside of the classroom. An average of 73% of tweens have access to a mobile phone, and 70% a tablet - devices capable of utilising AR tech, for example.

What is clear is that the world of education is evolving, although we don't foresee the school environment to be replaced entirely, enhancements to learning will be well received by kids, parents and teachers alike - the visual nature of TV forms a natural environment for this to happen.



88%

In France, the popularity of educational content on YouTube increased 88% year-on-year



"The BBC's content was interesting to see during the pandemic. The Public Service Broadcaster aired curriculum-based programmes on regular TV channels as well as online. The move was said to be aimed at low income families who would struggle to afford data packages for their children to take part in online learning".

RAJ SUNDAVADRA
Trends Analyst,
THE INSIGHTS FAMILY

WHERE DO TWEENS DISCOVER NEW CONTENT?

Media fragmentation means tweens today have more channels to watch, more platforms to stream, more social apps to download, more devices on which to play video games, and a greater selection of content within all those media. They also have a greater opportunities to find and engage with like minded individuals on smaller 'niche' platforms.

On top of this, globalisation means that content is no longer bound by borders, for example K-pop, originating in Korea, now has a presence in music charts across the globe. Because of globalisation, new IPs are emerging constantly, not just from new platforms but from other countries.

As a results **niche is becoming the mainstream.**

Platforms – such as YouTube (used by 44% of tweens in Europe) TikTok (used by 30%) enable kids to talk about and create a community around their favourite content and interests.

These platforms are just a medium to connect however. Real life friends still play an important role. When asked where tweens find out about the latest content, they lean on their friends to stay up to date on the latest TV shows.

Across Europe, 46% more kids in this age bracket are watching a TV show because their peers are than they were last year. Meanwhile, parents and siblings as influences have fallen by 34% and 7% respectively. Even despite limited face to face interaction over the last year, what your friendship groups and peers are doing and recommending matters to this age group more than ever.



46%
More tweens are watching a TV show because their peers are, than they were last year.



“We see new ‘niche’ platforms arising all the time. Reddit, whilst still only used a minority of tweens in the UK has increased by 46% year-on-year. Discord is another example following similar growth patterns. Both sites are comprised of a myriad of smaller pages or channels dedicated to various interests, spanning numerous industries.

What we are seeing is a stronger relationship between creators and viewers with users of these platforms as fans get to engage with a community passionate about their favourite content.”

NATASHA BLUMFIELD

Senior Research & Trends Manager,
THE INSIGHTS FAMILY

CONTENT THAT MATTERS

SOCIAL AWARENESS

It's no surprise to see a child's anxiety level increase following this last year. Boredom truly set in and content formed a great way for them to use as escapism and much valued entertainment.

But increasingly, tweens and their parents are seeking out much more than just entertainment from their content.

As social environments move digitally and education is taken online, **children are more attuned to worldwide news and global issues.**

Tweens in the US with access to a tablet over-index by approximately 20% when it comes concerns over key issues such as racism, animal cruelty and the environment. 10-12's are more likely to mobilise as they arrive at their own conclusions about the world. All age groups are more informed because of their access to technology and online media platforms. Following the tragic death of George Floyd in Minneapolis social

media made the story viral, causing reverberations around the world in the form of the Black Lives Matter movement. Concern over racism amongst German, Spanish and Italian tweens increased by over 200% year-on-year as the news spread to Europe. In the US, the desire to be a Police Officer fell 70% for 6-12s in June as concerns over racism increased by 65% for the same age group month-on-month.

This generation are empowered to take worldwide issues into their own hands, as they have the means and the tools to make a global impact. We have already seen examples of this in school strikes for climate change and #TeamTrees, but we anticipate that kids will only become more socially active as they gain more access to information. They don't want brands to be a part of a moment, they want them to be a movement. It has never been more important for a brand to have a purpose and align with the values and beliefs a child has.

 **1.4m**
the number of people who took part in the school strikes

'...no one is too small to make a difference'

Greta Thunberg



"Tweens are ready to have these difficult conversations and understand the world around them to make it a better place for all to exist within – but they do expect the characters they see on screen to align with these values. There is a real opportunity for creators to engage tweens and take the conversation to them via aspirational role models".

DAN MCDONALD

Senior Research & Trends Analyst,
THE INSIGHTS FAMILY

KEY CONSIDERATIONS

WHEN CREATING CONTENT FOR THIS DEMOGRAPHIC

1 IT STARTS WITH UNDERSTANDING

The majority of Tweens today have access to a personal digital device which means they have endless content across a multitude of platforms. We need to understand who they are in order to build a relationship with them to secure a future audience.

2 ROLE MODELS MATTER

This generation are still learning and look to role models and peer groups, rather than parents for guidance. This means when engaging with content they will relate strongly to characters, seeking out a role model to aspire to. Any immoral behaviour should be punished, and boundaries determined to help children this age to learn via observation.

3 HELP MAKE THE WORLD A BETTER PLACE

Tweens have a strong understanding of the world around them and are willing to make changes to benefit the greater good. It has never been more important for content or platforms to have a purpose and align with the values and beliefs a child has.

4 EDUCATE AND ENTERTAIN

Tweens today are curious about the world around them and are keen learners looking for inspiration. Content that offers a dual purpose of providing entertainment whilst satisfying this curiosity is likely to appeal to both parents and kids alike. This age group respond exceptionally well to visual stimulus and therefore offers a natural place to educate and inspire the tween viewer.

5 THE WORLD MOVES FAST FOR THIS DIGITALLY ENABLED AGE GROUP

The iPad was already a year old when today's 10-year-olds were born. The tween group is like no other and will quickly adapt to changes in technology. They will not however respond well to technologies that appear to stand still in terms of development and will expect innovations in content as well. Technology such as wearable devices, mobiles or smart speakers which this age group are all confident in using can work well to add a further dimension and create deeper connections.

6 THE METAVERSE IS COMING

It is only a matter of time before a fully digital universe is realised with children driving their own narrative in a world where anything is possible. Content can find a place in this world, and it forms a natural environment to drive a deeper level of fandom and two-way conversation between the audience and the content. Now is the time to redefine your audience; allow for collaboration and offer co-creation to help deepen the relationship.

IN CONCLUSION

BY NICK RICHARDSON, FOUNDER & CEO

The Industry Voice Report 2021 found that almost 9 in 10 industry professionals think the world is changing faster than ever before.

Yet only 6% of businesses said they have a true understanding of the kids, parents and family demographic.

While tweens have been an overlooked generation so far, there are significant opportunities for creators which can re-engage these young viewers. They seek personalisation and are more socially conscious than ever before. Actively supporting brands and content which mirrors their values and shunning those who don't.

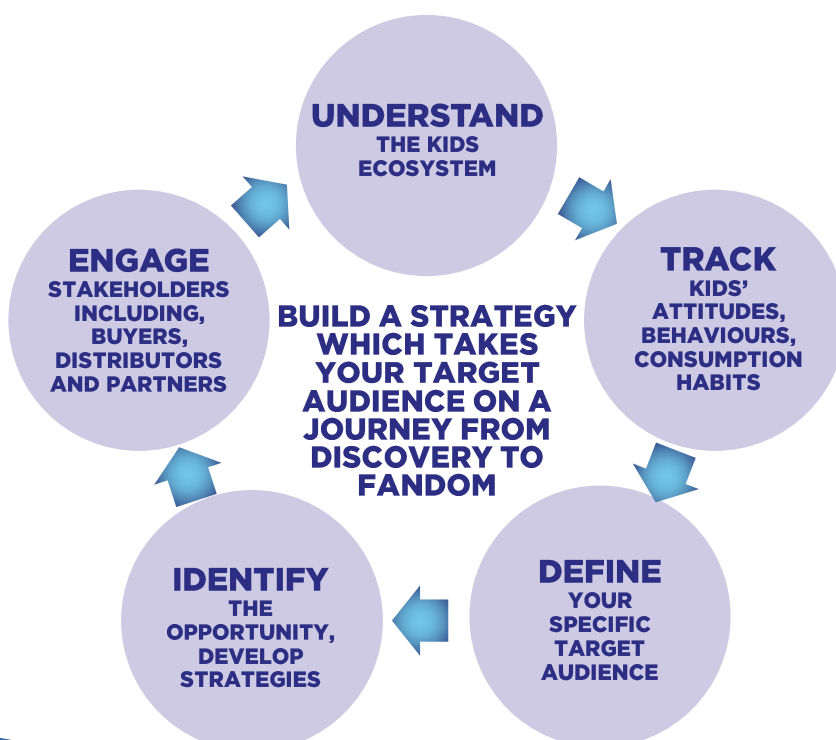
But as everything is connected, it's important the world of TV doesn't just think about TV. If families are spending more money and time on apps, they have less time and money to spend on other areas of their lives. With technology increasingly blurring the lines between sectors, it's imperative that research takes this into account.

As tweens, parents, and families continuously change the way they work, learn, and relax – it's more important than ever to understand their attitudes, behaviours, and consumption patterns in real-time.

We have developed a model which enables content creators to build a strategy which takes their target audience on a journey from discovery to fandom. Understand the key trends and behaviours, track how they are changing, define your specific target audience. From this, we can identify new opportunities and partners.

It's crucial we engage this demographic, otherwise if we lose them, it's difficult to get them back as attitudes, behaviours and consumption patterns permanently shift.

With all these changes, events such as MIPCOM and MIPJUNIOR have never been more important to the industry, and we look forward to seeing you all at the event.



NICK RICHARDSON
Founder & CEO,
THE INSIGHTS FAMILY



THE
**INSIGHTS
FAMILY®**

mipjunior®

**WORKING TOGETHER
SINCE 2018**

ABOUT US

ABOUT THE INSIGHTS FAMILY :

The Insights Family survey more than half a million kids and parents every year, offering an unrivalled viewpoint into the world of pre-schoolers, kids, tweens, teens and parents.

Kids Insights and Parents Insights collects data in a linear manner, via online surveys.

Both services operate in 18 countries across five continents and in total survey more than 383,760 kids and 187,200 parents a year. The sample is nationally representative and equally weighted across both age and gender.

ABOUT MIPJunior:

MIPJunior is the World's Leading Kids Entertainment Content Market. This event, collocated this year with MIPCOM in Cannes & online, gathers the most influential buyers, commissioners, producers, development executives and distributors from the global Kids TV industry.

- Learn more on [MIPJunior/MIPCOM](#)
- Stay tune with TV industry insights all year long on [MIPTrends](#)



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Future Forecast 2022 report,
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try.theinsightsfamily.com/mip