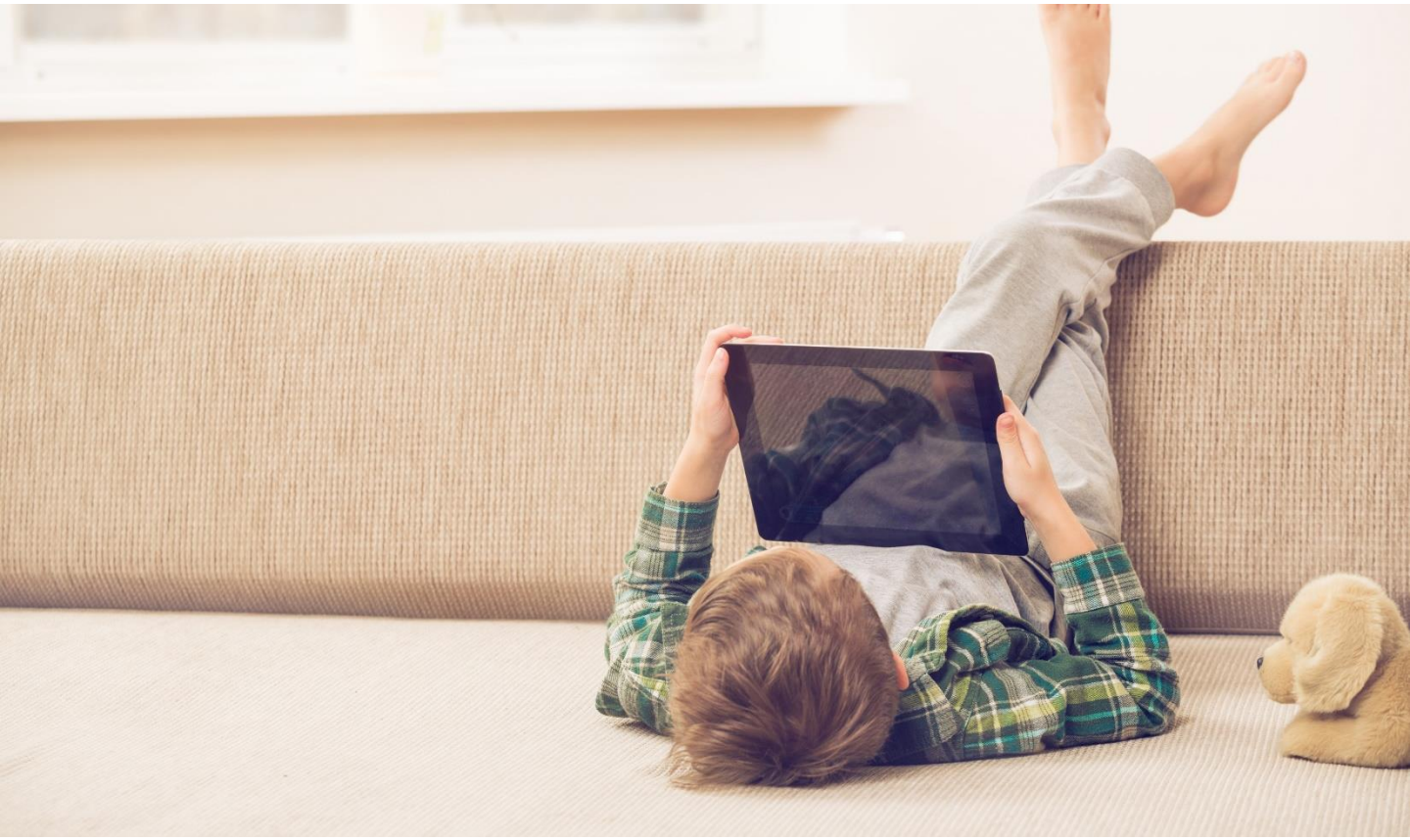
2018
CLICKS, TAPS & SWIPES

an in-depth analysis of the digital behaviors of U.S. children



SMARTY PANTS

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OVERVIEW & METHODS

Welcome to the 2018 CLICKS, TAPS & SWIPES REPORT, a comprehensive look at the digital ecosystem of U.S. kids and their families.

The report—published by SMARTY PANTS® youth and family research firm—is derived from primary qualitative research and quantitative findings from the 2018 BRAND LOVE® study.

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

BRAND LOVE ® 2018 is the 10th wave of the annual study. It was fielded online among a nationally-representative sample of over 8,900 kids and tweens ages 6 to 12 and their parents. Data collection took place in June and July 2018 in order to capture both school year and summer learning.

Kids and parents evaluated a total of 379 brands across 19 categories in 2018. Each participant assessed up to 15 brands, providing both closed- and open-ended responses.

- 379 BRANDS
- 19 CATEGORIES
- 8,904 KIDS & TWEENS AGES 6-12
- 8,904 PARENTS OF 6 TO 12-YEAR-OLDS
- 15 BRANDS PER RESPONDENT
- MORE THAN 24,000 VERBATIMS
- BRAND TRACKING SINCE 2009

Closed-ended responses include rating each brand on 30 BRAND ATTRIBUTES & DESCRIPTORS:

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

Note that "me" is replaced with "my child" for parents

An analysis of these attributes—by category and across categories—yields a deeper understanding of how brands perform and categories behave.

Kids and tweens also rate how POPULAR they perceive each brand to be. The results aid in mapping brand momentum.

MEASURING SUCCESS

Two proprietary measures are referenced throughout the report:

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

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

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

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

2018 BRAND LOVE STUDY

All brands referenced in the report in CAPITAL LETTERS are part of the 2018 BRAND LOVE® study.

2018 THE DIGITAL LANDSCAPE

WELCOME TO CLICKS, TAPS & SWIPES 2018!

It is an exciting year for kids' digital engagement. Screens, content and experiences are multiplying, as are offerings that do not require a screen. Products and services are fulfilling kids' ever-expanding digital wish-lists, and they are doing so in compelling new ways that meet social, educational, entertainment and creative needs, and leave kids hungry for more.

At that same, questions are being raised about kids' digital wellness and safety. From concerns over screen addiction to fears of privacy breaches, parents, legislators, teachers and corporate citizens are saying "let's take a beat to figure this out" while kids are saying "give us more."

The following report is a 2018 immersion into kids' digital behaviors, device usage, and the digital brands that are (and are not) making the kid connection. It also includes trends like the dichotomous ones mentioned above, case studies for select digital brands, and observational truths of kids' plugged-in" lives.

After a foundational *DOING* section on how kids are spending their digital leisure time, and a *USING* section on which device types fuel those activities, the report is organized by digital activities (and the brands that fuel them). The section order is based on which activities 6-12s engage in most often—starting with *WATCHING* and *ending with WEARING*.

In the final *A LOOK AHEAD* section, the SMARTY PANTS® team provides expert perspective on what's to come in kids' and families' digital lives in 2019 and beyond. This two-page closer is a must-read for developers, distributors and youth marketers.

Enjoy the data and insights!

WHAT KIDS ARE

DOING

MORE SCREEN TIME, PLEASE

If it is digital, chances are kids are doing more of it in 2018. Today's 6-12s are using more screens (and device accessories), and they are doing so more frequently. Digital offerings aren't cannibalizing one another; they are multiplying kids' overall digital engagement.

This year, most of kids' digital activities have seen an increase—especially if it involves a smartphone. Many activities post only a one or two percent-point shift, but the cumulative annual change is substantial. On page 7, these small changes are not noted (because they are not statistically significant), but suffice it to say that nearly all trend toward more screen time.

GAMERS UNITE

The largest change in digital engagement is how often kids are now playing games on a mobile phone. On a daily basis, mobile gaming has climbed from 44% to 52% of kids, and weekly it has jumped from 69% to 78%. No other frequency change reflects this large of a YOY swing.

Kids are also more likely to play games on a VR headset at least weekly in 2018. And playing games on a phone or tablet that leverage augmented reality is up, too.

With 2018 releases of popular games like FORTNITE and several VR video games, it's no wonder why these shifts are occurring. Kids are riding the wave of what's cool and new.

FOR YOUR VIEWING PLEASURE

More kids in 2018 are watching TV shows on their phones. Over half (56%, up from 50% in 2017) do so at least once a week. Various streaming services and apps have made it easier to do so, and kids are

taking advantage of the opportunity.

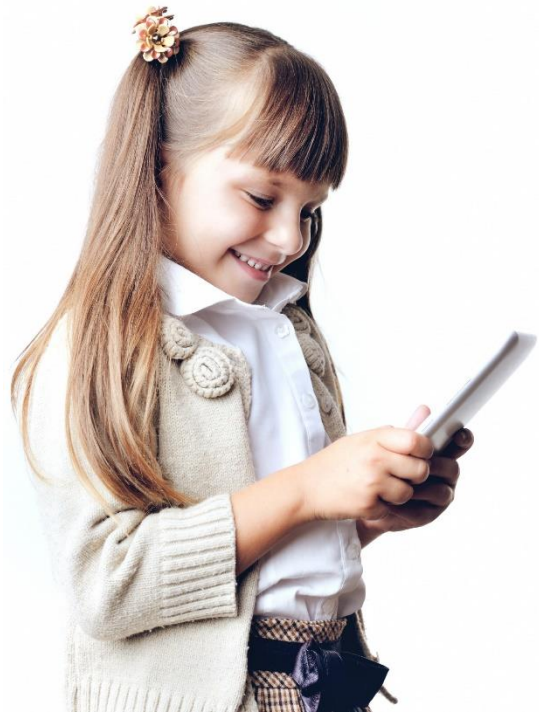
Kid TV show viewership on tablets is up as well, but the increase is not as great (+3%). And watching *videos* on VR headsets is also up 3%, at the weekly level.

While kids' weekly TV watching on phones and tablets has increased, their frequency of viewing traditional programming on a TV has decreased. Daily viewing has slipped 3%; weekly viewing has dropped by 2%.

SOCIALLY SPEAKING...

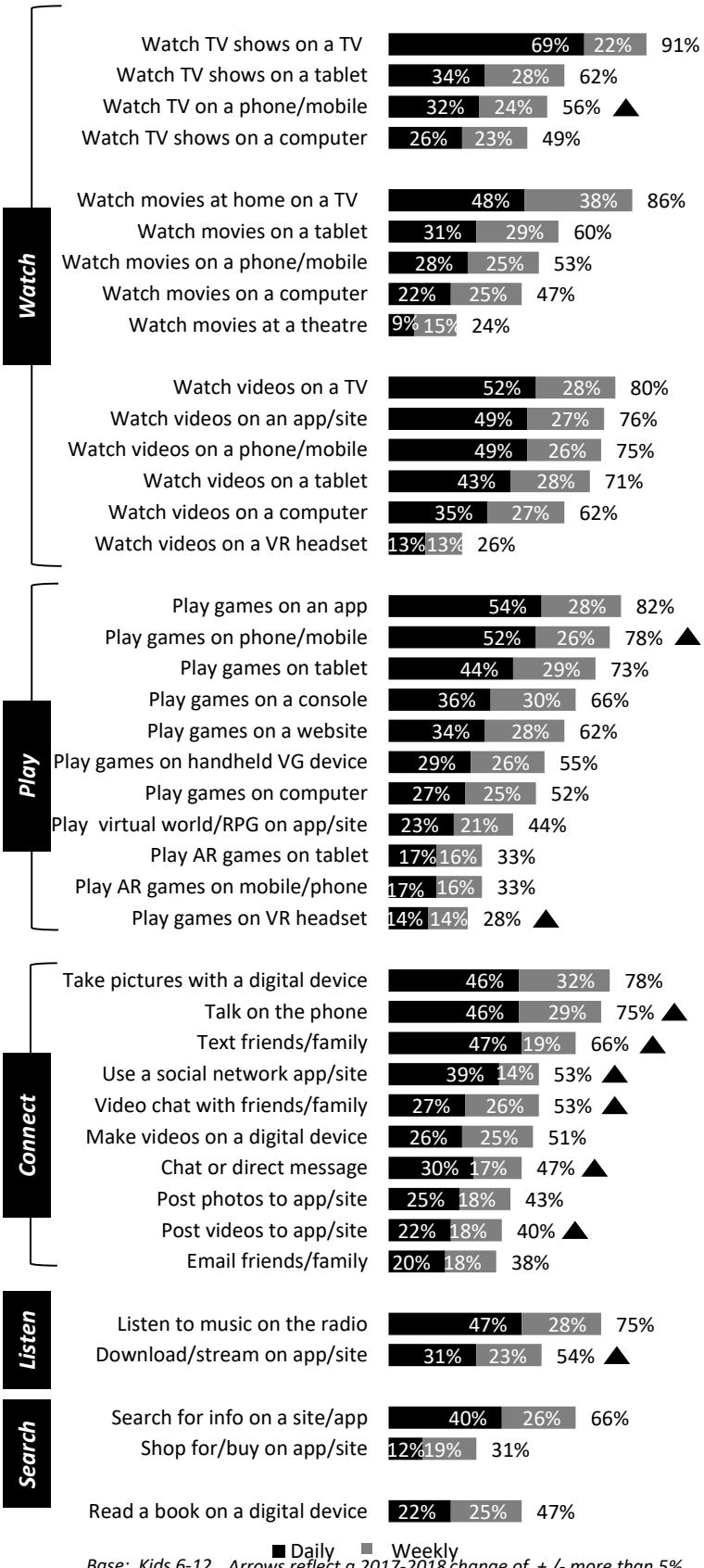
Kids aren't just upping the ante on playing and watching. They are also connecting more often:

- Talking on the phone (+6% daily, +3% weekly)
- Texting (+6% daily, +5% weekly)
- Using social network app/site (+5% daily, +4% weekly)
- Video chatting (+5% daily, +7% weekly)
- Chatting or DMing (+4% daily, +6% weekly)



KIDS' DIGITAL ENGAGEMENT, 2018

(% of Kids Who Do Activity At Least Weekly)



Base: Kids 6-12 Arrows reflect a 2017-2018 change of + /- more than 5%

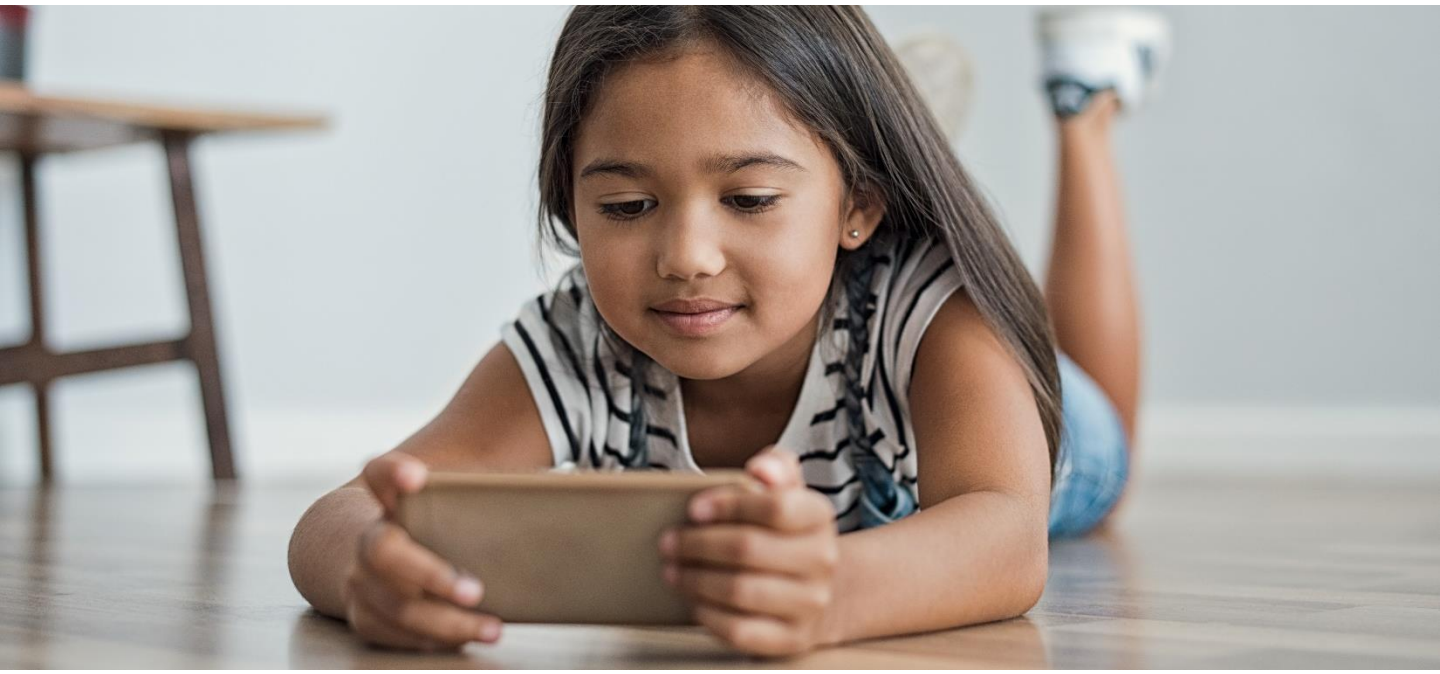
Many of these are activities that social media apps like SNAPCHAT and INSTAGRAM have added as features within the last year, making them cooler, more fun, and more accessible to young users.

Social media apps have also begun streaming content. This gives kids more opportunities to keep their fingers and minds busy with mobile devices. It is also evolving SM platforms from teen- and adult-centered communication portals to social yet approachable kid playgrounds, creativity hubs and content providers.

FROM BEHAVIORS TO BRANDS

The "doing" story of kids' digital engagement in 2018 is one of "bring it on." Kids are looking for endless content that meets their specific interests and passions. They are looking for endless play opportunities that let them "verse" (that's kid lingo for "vs-ing" someone in a game) and connect. They are looking for endless interactivity with the devices and peripherals that surround them—activated by voice, motion, click, tap or swipe. And they are looking for endless rewards and affirmation that help them confidently come of age in an era when likeability, popularity, attractiveness, skills and success are all digitally measured.

In the following sections, find out which brands are meeting these needs. Explore which devices, content, experiences, etc. are winning with kids and tweens in 2018, and which show the greatest promise for future success.



WHAT KIDS ARE

PLAYING

GAMES, GAMES, GAMES

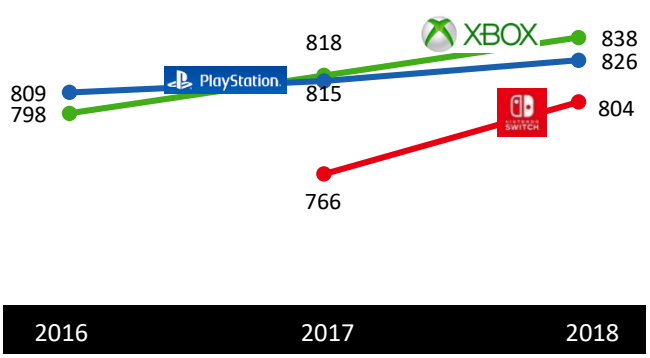
Each week, 78% of kids 6-12 play games on their phones, 73% play on their tablets, 67% play on gaming consoles and 55% still play on handheld gaming devices. Among boys, the latter two percentages jump to 76% and 61%, respectively. There's no question that digital play is central to kids' clicking, tapping and swiping behaviors in 2018.

As outlined in the *USING* section, digital gaming is on the rise at both the weekly and daily levels. With so many platforms on which to play, countless exhilarating new games and a growing cooperative play pattern that's changing the nature of gaming altogether, playing has never been more exciting and engaging.

TOP CONSOLES STILL GROWING

Though gaming has increasingly become mobile, video game consoles are still very much winning with kids. XBOX remains kids' favorite console this year, gaining 20 KIDFINITY points and landing as the #26 brand overall. PLAYSTATION is right there with it, upping its score by another 12 points to assume the number 34 spot. Last year's newcomer NINTENDO SWITCH continues to be a breakout success with increased awareness, love and popularity in 2018.

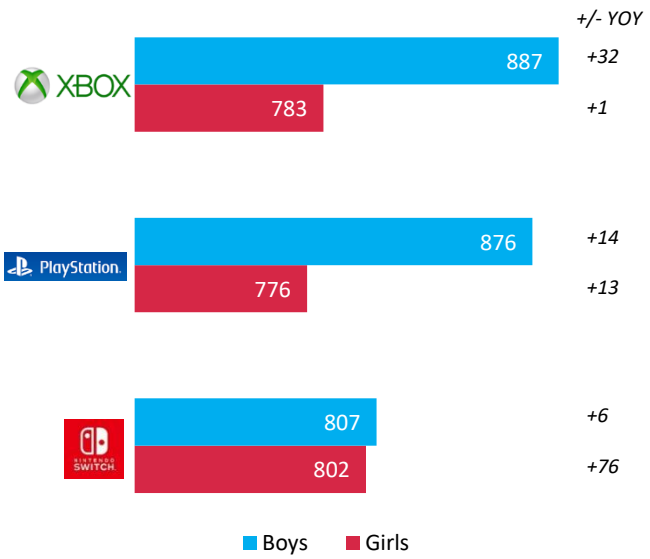
KIDFINITY FOR SELECT GAMING CONSOLES, 2016-2018



Base: Kids 6-12

There is a KIDFINITY gender gap for console brands, with boys having a much stronger relationship with XBOX and PLAYSTATION than girls. While girls' affinity for XBOX remains unchanged, their KIDFINITY for PLAYSTATION is growing—and their relationship with SWITCH makes a major leap in 2018. SWITCH now shows negligible difference by gender.

KIDFINITY FOR SELECT GAMING CONSOLES, BY GENDER, 2018



Base: Kids 6-12

While PLAYSTATION and XBOX are at parity on awareness and appeal, XBOX is more popular among 6-12s. SWITCH has successfully grown on these key metrics in the short 18 months since its release, but it trails the leaders. Seven in 10 kids *like* or *love* the brand, and 64% of aware kids consider it to be *really popular now.*

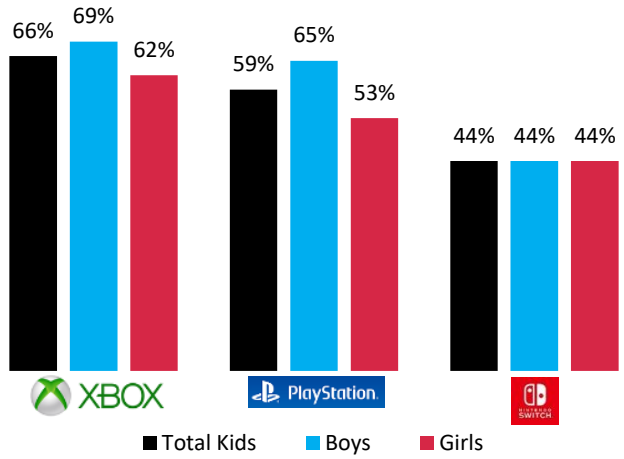
KID AWARENESS, APPEAL & POPULARITY OF SELECT GAMING CONSOLES, 2018

	% Aware	% Love/Like	% Really Popular Now*
PlayStation	92%	86%	68%
XBOX	91%	84%	72%
SWITCH	76%	71%	64%

*Base: Kids 6-12; *aware kids 6-12*

XBOX leads on usage for both boys and girls. As with KIDFINITY, notice NINTENDO SWITCH'S identical usage across boys and girls at 44%—up from 34% in 2017.

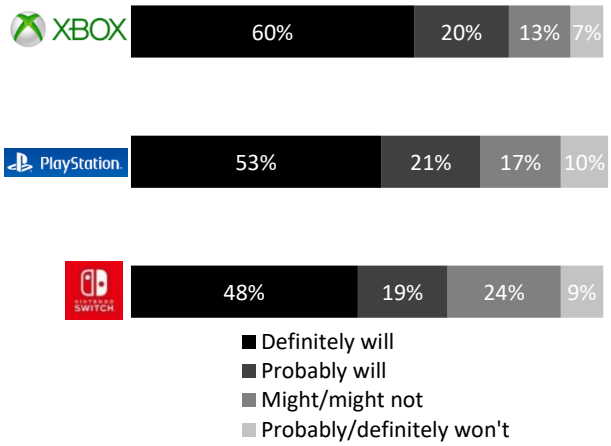
CURRENT KID USERS OF SELECT GAMING CONSOLES, BY GENDER, 2018



Base: Aware kids 6-12

Future usage intent scores indicate that even in the ever-evolving gaming space, a majority of kids plan to keep using the three consoles next year. Roughly a third of kids doubt their future use of NINTENDO SWITCH, however, suggesting that their gaming needs are being met via complex systems/controllers with highly immersive games or by mobile gaming.

KID FUTURE USAGE INTENT OF SELECT GAMING CONSOLES, 2018



Base: Kid users 6-12

"I love the games I have for my Xbox and I like the way the controls work."

– 8-year-old boy

Kids are opting for Nintendo Switch over Nintendo 3DS this year, but the 3DS is not dead. It loses 37 points since last year, but still pulls in a solid 765 KIDFINITY among total kids as the #88 brand of the 379 evaluated. It is still used by 49% of aware kids.

CLASSIC CONSOLE GAMES PREVAIL

LEGO WORLDS tops the list of console games in 2018, a testament to kids' enduring love for building and constructing, even on screens. Nearly nine out of 10 kids (87%) know the LEGO-themed sandbox game released last March, and 78% have already played it!

Decades old MARIO KART is still driving kids wild, adding another 18 points this year for a score of 774. Nintendo's newer SUPER MARIO ODYSSEY, developed for the SWITCH, is keeping the franchise fresh and kids are loving it. Of those who play the game, 86% do so at least weekly.

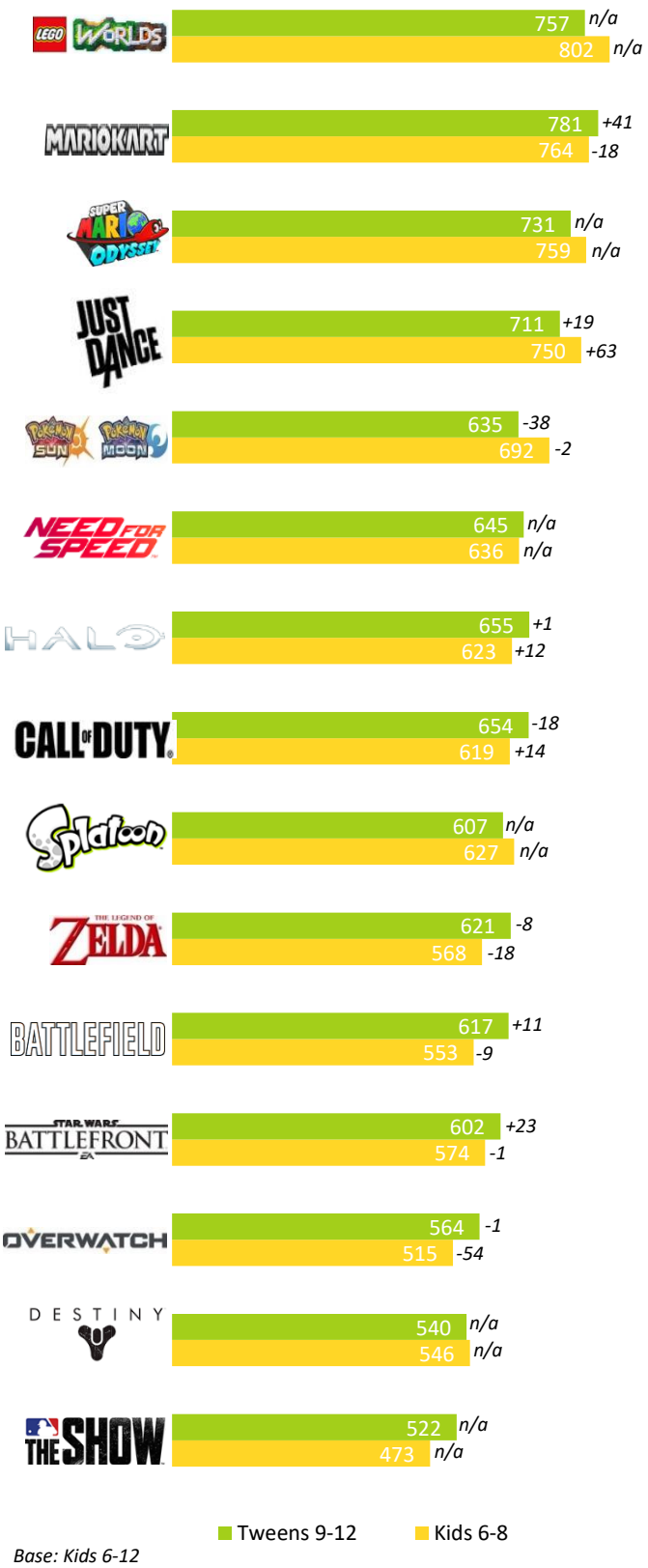
Kids are still dancing with JUST DANCE, role-playing with POKÉMON SUN AND MOON, racing with NEED FOR SPEED and shooting the enemy with HALO and CALL OF DUTY. These classic console-only games have earned their place in kids' hearts and remain mainstays in families' living rooms and kids' bedrooms.

MOBILE GIVES KIDS A GAMING FIX

Most app-based games are inherently less immersive than console experiences. Kids turn to them for "snack size" and on-the-go entertainment so that they are never bored.

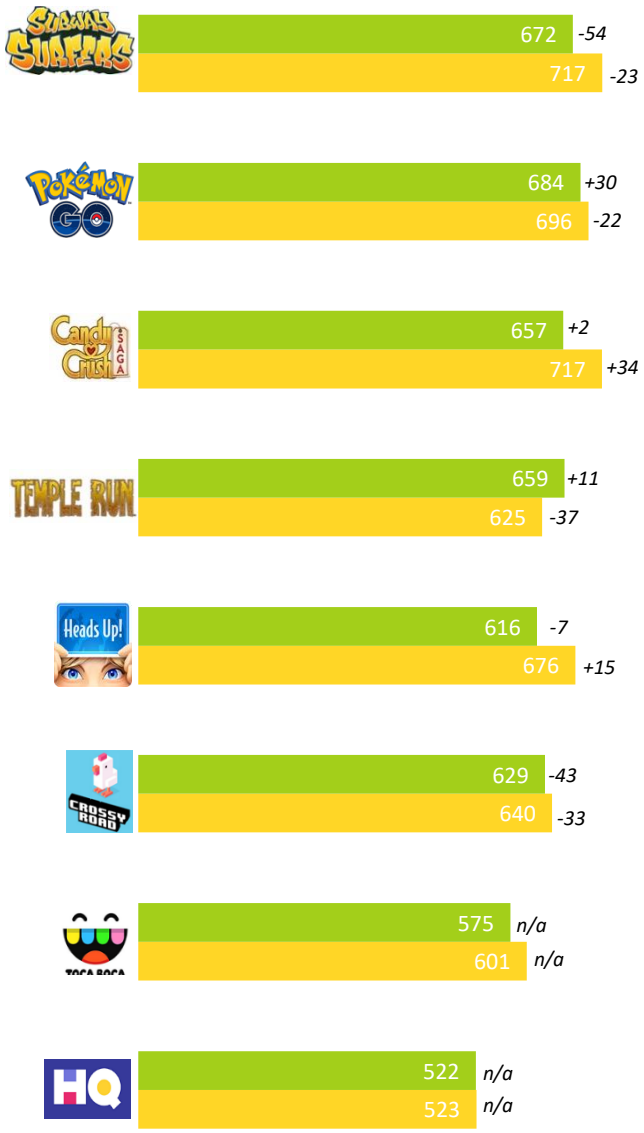
The average KIDFINITY score for the mobile game category is notably lower than console and crossover games, and popularity of these games is more transient as new mobile games come and go.

KIDFINITY FOR SELECT CONSOLE GAMES, BY SUBGROUP, 2018



Base: Kids 6-12

KIDFINITY FOR SELECT APP GAMES, 2018



Base: Kids 6-12

SUBWAY SURFERS ranks highest on KIDFINITY in 2018, but loses 41 points as a result of slipping popularity (just 37% of kids say it is *really popular now*). POKÉMON GO continues to excite kids with its augmented reality capability, indicated by the 69% of 6-12s who *love* or *like* it. The colorful treats in CANDY CRUSH SAGA have attracted 42% of aware kids to play this year, just slightly less than the 44% who played a year ago. And the whole family can join in with social games HEADS UP! and HQ TRIVIA, which seven in 10 kids play with their parents or entire family.

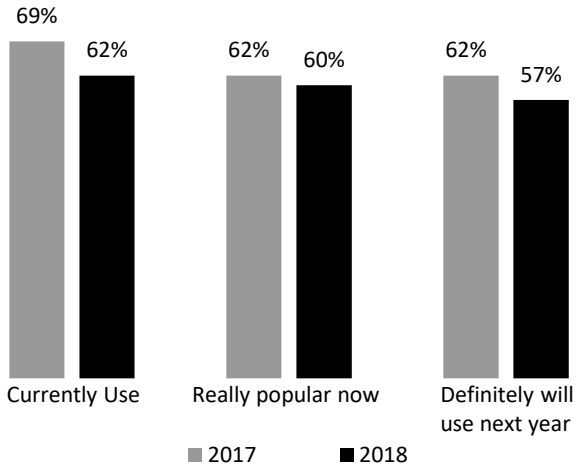
Computer games are also keeping learning fun and interactive. Nearly six in ten (59%) of aware kids play Coolmath-Games.com, and 47% are FUNBRAIN users. Over a third (34% and 40%, respectively) say both brands are *becoming more popular* this year.

CROSS-PLATFORM GAMING IS THE FUTURE

Over the last several years, game developers have continued to open the experience so that players can engage across platforms. With new technological advances allowing for higher quality graphics, the devices on which kids are playing have become less of a factor. Kids are looking for seamless game play regardless of which screen is nearby.

MINECRAFT is a great example of success. But after reaching an all-time high score of 813 in 2017, MINECRAFT's popularity has started to erode as newer games earn kids' attention. Current usage has slipped to 62%, and future usage intent is also on the decline with just 57% of kids saying they will *definitely* play next year.

MINECRAFT KID USE, POPULARITY & FUTURE USAGE INTENT, 2017-2018



Base: Aware kids 6-12

THANK YOU!

SMARTY PANTS® is an award-winning, Insights Association-certified, market research consultancy. The woman-owned firm provides best-in-class qualitative and quantitative research and strategic consulting to corporations, agencies and not-for-profit organizations around the globe. The Smarty Pants team of research and strategy experts excels at gathering youth and family insights and helping clients translate those insights into smarter products, programs, and communications.

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

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