Kids these days

Examining the attitudes and digital behaviors of kids aged 8-15

GWI.

In this report

Click the dots to navigate

Methodology & definitions

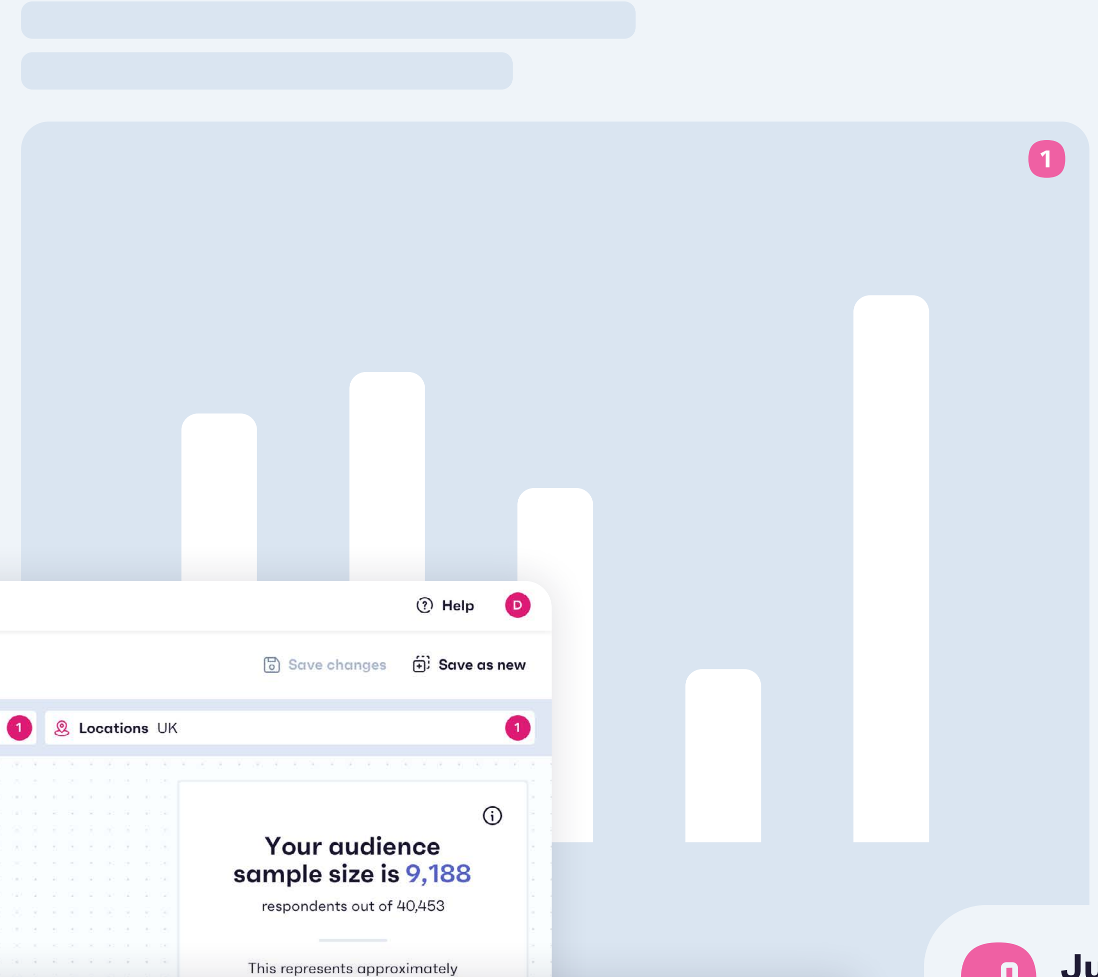
Figures in this report are primarily drawn from GWI Kids, our online research among 15,418 internet users aged 8-15. The survey is fielded in the following 14 markets: Australia, Brazil, Canada, France, Germany, Italy, Malaysia, Mexico, Poland, South Africa, Spain, Turkey, UK, and U.S.A.

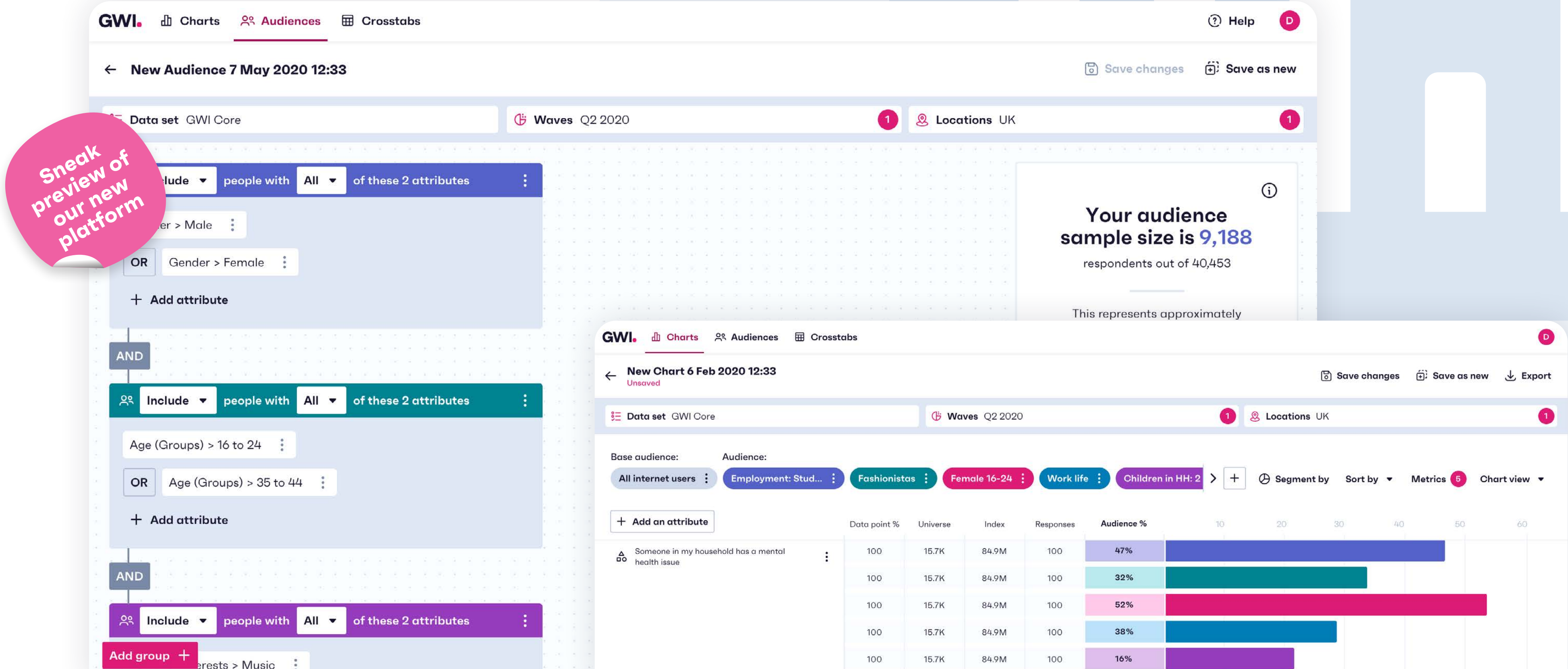
GWI Kids represents children aged 8-15 who use the internet. It does not therefore overlap with GWI Core, which represents internet users aged 16-64. Because children who do not use the internet are not represented in GWI Kids, it's important to remember that internet penetration rates vary significantly between the different countries included in the study (from highs of around 90% to lows of around 60%). Because of this, the demographic composition of the online population may look very different from one market to the next.

When reading this report, please note that we use a mixture of data from our GWI Kids dataset fielded in Q1 2020 across 14 markets, our GWI Core dataset which is fielded across 47 markets, and GWI Zeitgeist data conducted in the U.S., UK, France, and Germany.

Discover the data on our platform

Each chart from our ongoing global research in this report contains a hyperlink that will bring you straight to the relevant question on our Platform, where you can investigate all data by demographics, over time, and among your own audiences.





1 **Each of the graphs is numbered**

More information can be found in the Appendix section at the end of this report

Just click this icon to explore the data on the platform

Source

Base

Information about the source and base

Key insights

Teens' values are more progressive than you might think

Our research highlights just how front and center pro-environmental attitudes and behaviors are among today's 12-15 year olds. Caring for the planet is one of the most important things to them and is higher up the list than priorities typically associated with teenagers like caring about their peers' opinions. It's clear teens will expect a lot more from brands when it comes to environmentally friendly practices and CSR policies more broadly.

There's a lot of room for new software solutions that can educate and protect kids online

Parental policing isn't the answer to kids' online wellbeing. Our data indicates that the longer kids spend online the more autonomy they have over what, or how much, content they're exposed to. Rather than policing their time online and the content they consume, teens should be taught and encouraged to think critically about their viewing habits. Software companies and game developers should prioritize the design of interactive and educational experiences with today's youth in mind.

Gaming is more than a pastime – it's a learning tool and social hub rolled into one

Gaming is part and parcel of kids' daily lives; just over 70% of gamers aged 8-15 say they play video games most days or every day. What was perhaps once seen as a time-wasting distraction is now a space to learn, create, and build connections. With creation games like *Minecraft* and *Roblox,* kids get to flex their creative muscles and build new worlds. Gaming not only lets them escape from the chaos of everyday life, aiding mental health, but also helps to bridge the social gap for many kids and families.

TV: family time, that just keeps on growing

Unlike gaming, which is mostly played alone or with friends, most kids watch TV with their parents. Even as kids get older, TV time is family time. Consumers spent **$35 billion** on video streaming last year, and this is only set to grow. We also see signs that kids have significant influence over what shows and movies they watch, and in turn, what subscriptions parents sign up for (and stay with). In a crowded streaming space, unique IP and content that caters for kids and families keeps them coming back for more.

The attitudes of today's teens offer a lesson in how to speak to tomorrow's shoppers

Few teens make regular digital purchases; yet, around 1 in 3 mainly use social media to engage with their favorite brands. The focus therefore should be on establishing bonds with this audience that can endure into adulthood and recognizing that teens have certain content preferences. Funny posts are the most common reason they log onto platforms, followed by memes – a sign that humor resonates strongly with young age groups.

01

Values and aspirations

Empowering the next generation of women

Confidence is one of the biggest predictors of how seriously kids take their education and future as a whole. Our data shows that young teens (12-15 year olds) who describe themselves as confident are more likely than the average teen to say it's important to go to university (62% vs. 51%) and to get good grades (71% vs. 64%). But confidence is a quality typically more associated with men than women, at least in today's adult population. For example, a **study** found that there's a gender gap in self-promotion where women who perform as well as men describe their ability less favorably to potential employers.

From our Core consumer data set looking at 16-64s, it's in fact men who are more likely than women to describe themselves as confident; and this is consistent across all age groups. However, today's teenage girls could be reversing this trend. According to our GWI Kids data-set, girls are not only just as likely as boys to say they're confident, but their confidence also shines through other attitudes. They're much more likely than boys to say they can do any job they want to (57% vs 31%) and voicing their opinions is also more important to them (47% vs 42%).

It's clear that today's youth are being raised with an emphasis on equal opportunities, making sure that girls in particular are equipped with the self-confidence they need to succeed. Role models are equally important in this journey. Compared to other generations, millennial women are the most likely to describe themselves as confident (53%) and so are the kids of this age group (47%). It's clear that positive change toward gender parity is going in the right direction but the family environment alone won't be enough to drive progress at scale.

Brands, corporations, and governments all need to step up and do their part to ensure that girls have an equal representation in the next generation of leaders. Currently, **women earn 82%** of what men make, which is a figure set back by the economic turmoil of COVID-19. While the gender pay gap isn't something that can be closed overnight, small steps in the right direction from all stakeholders can contribute to empowering the women of tomorrow.

Brands can craft campaigns to challenge traditional gender roles and inspire women. For example, Sport England's "This Girl Can" campaign **partnered** with Heart radio to encourage women to return to their usual activity habits – something that has been negatively affected by COVID-19. Similarly, with its "We See Equal" and "Like a Girl" campaigns P&G has established itself as a long-standing **advocate** of gender equality.

Today's girls are more empowered than ever

GWI Kids Q1 2021 7,745 kids aged 12-15

Activism is the new extracurricular

From climate change to social and racial inequalities, kids are becoming increasingly aware of the problems and uncertainties of the world; and they're more than just bystanders.

Our research highlights just how progressive today's teens are: 44% of 12-15 year olds say caring for the planet is important to them, which is higher up the list than priorities typically associated with teenagers like caring about what their peers think of them (28%) or having the latest fashion (23%).

But what's more important is that they've developed these values into interests. Even though the environment isn't among their top 10 interests, it still surpasses things like fashion (39%) and beauty/make-up (31%). 15% are also interested in vegan or vegetarian food, rising to 22% among those who say they choose what food they eat. This further highlights that, when given autonomy, kids are more likely to choose a meat-free diet.

Pro-environmental behaviors aside, teens' altruistic nature and their attitudes toward equality also stand out. "Helping people" (61%), "everyone being treated the same" (55%), and "protecting people from bullying" (45%) are all among the top 5 statements teens describe as important to them.

The good news is that altruistic values increase as kids move up at school, but our research also highlights the need for raising more awareness when it comes to inequalities with kids from higher income backgrounds. While half of them say everyone being treated the same is important to them, this figure is much higher among kids from lower-income households (62%).

There's no denying that teens' attitudes and values may change somewhat as they get older, but given how pronounced they are at this age, we believe these values will be the backbone of tomorrow's consumers. They will expect a lot more from brands when it comes to environmentally friendly practices and CSR policies more broadly. Living and breathing these values should be every brand's top priority.

Activists and altruists at heart

2

Sustainability

% of teens who say...

"The following are important to me

	%
Caring for the planet	44
Recycling	34

"I'm interested in the following

	%
The environment	41
Climate change	23

Altruism

% of teens in the following school groups who say **protecting people from bullying** is important to them

Primary	Lower Secondary	Upper Secondary
43%	46%	48%

Equality

% of teens in the following income groups who say **everyone being treated the same** is important to them

Low	Medium	High
62%	57%	50%

GWI Kids Q1 2021 7,745 kids aged 12-15

02

The impact of COVID-19 on kids

It’s not all equal in the end

There’s been a lot of talk about potentially “losing a generation” as COVID-19 threatens long-term damage to kids’ wellbeing and education. This isn’t just a concern among adults; the vast majority of kids are feeling uneasy and apprehensive about the future. But the pandemic has hit some harder than others, and when striving to get a generation back on its feet, it’s important to highlight those most in need.

Across 14 countries, there’s a near split in what kids are most worried about. In 8, kids rank not seeing friends top, particularly in places like Canada and the UK where it scores over 10 points ahead of the next factor. Supported by government schemes, parents in these markets are much more likely to say COVID-19 hasn’t impacted their finances, which is linked to less anxiety about the future.

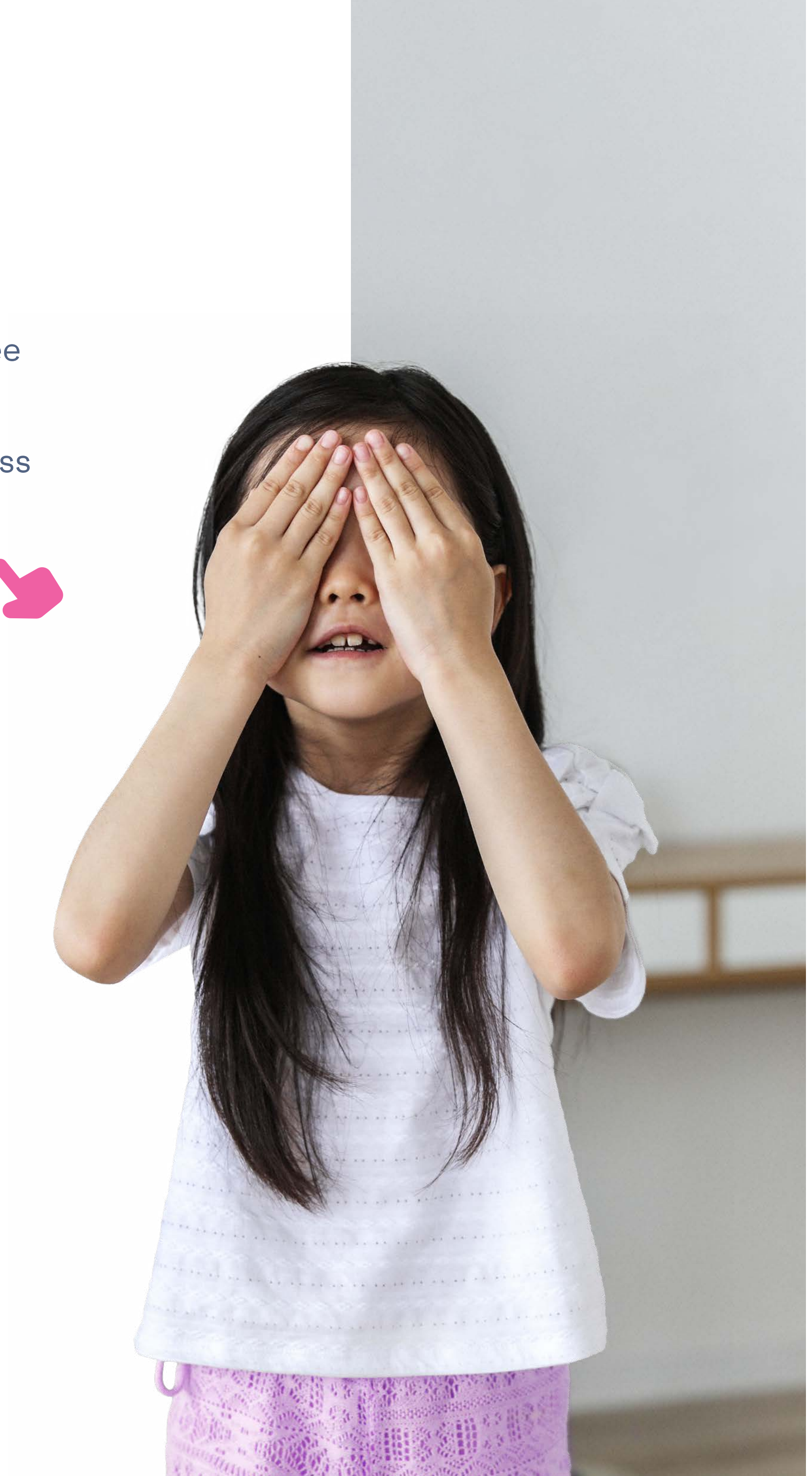
> “Throughout the pandemic, there has been a persistent myth that children are barely affected by the disease. Nothing could be further from the truth.
>
> **HENRIETTA FORE,**
> UNICEF Executive Director

Ultimately, fears of not seeing friends will dissolve as restrictions ease; whereas others are set to endure.

It's countries where households have taken the worst financial hits – like Mexico and Brazil – that kids are most anxious about their family getting ill. This emphasizes the importance of tone when communicating to young audiences in different countries.

Last year, Australian and Scandinavian **governments** held press conferences for minors, allowing them to submit questions. While concerns fluctuate over time, the Finnish event in particular was dominated by questions like "when can we go back to school?" and "why can't I hold my birthday party?", which call for more candid responses; whereas in a country like Brazil, age-appropriate health advice and higher doses of optimism may be needed for the same level of reassurance.

Want to see how kids opinions differ across markets? **Demo our data set**



Most are worried, but some more than others

% of kids in each financial group who say they worry about...

3

	Negative financial impact	No financial impact	Positive financial impact
My family getting ill	65	55	52
Not seeing friends enough	58	55	45
Getting ill	48	39	39
Falling behind at school	44	32	38
The future	35	25	37
Not seeing family enough	35	31	27
Missing out	22	19	26

GWI Kids Q1 2021

8,830 kids whose parent/guardian said the COVID-19 outbreak has negatively impacted their personal/household finances, 4,906 who have seen no impact, and 1,682 who have seen a positive impact, aged 8-15

It's time to go on mute!

Though the impact of digital or 'Zoom fatigue' on employee wellbeing has been widely discussed, its role in the classroom is often an afterthought. Yet, kids feel it too.

In Q1, sentiments of digital overuse were significantly more prominent among 12-15s still being home-schooled than among returnees, especially at the younger end of the spectrum.

If schools haven't already taken steps to mitigate the effects of back-to-back video calls, now's the time to do it. Aside from educators creating a schedule that allows for more breaks and adopting alleviation tips like letting students keep their cameras off, software companies can also be part of the solution.

Bramble – a video chat startup that was originally built for the live event community – has been adapted for classroom learning. Its main selling point: it combats **digital fatigue** by combining videoconferencing and gaming technology.

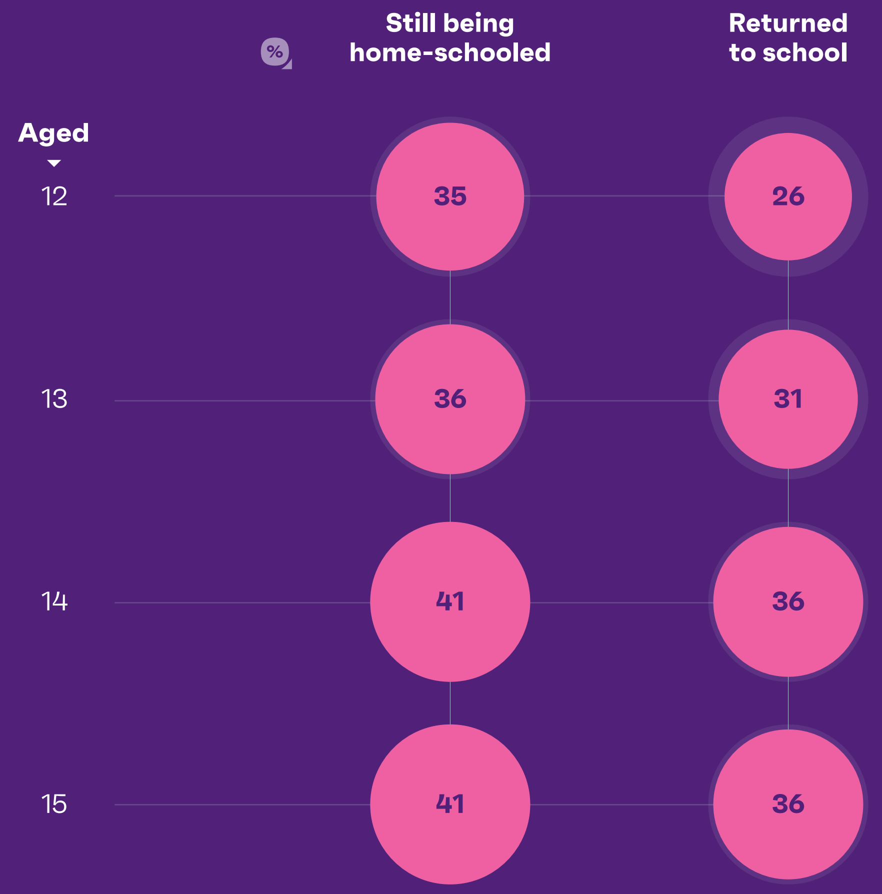
It's not in their heads: Zoom fatigue is real

36%

of 12-15s who do their homework online say they take breaks from using their devices

% of kids who are still being home-schooled/have returned to school and say they spend too much time online

4



GWI Kids Q1 2021

4,269 kids still being home-schooled and 2,645 returnees aged 12-15

By giving kids the power to create their own avatar and the autonomy to choose where they want to work, it fosters a relaxed environment and allows students to interact as they would in a video game.

COVID-19 will continue to restrict movement in various parts of the world at different times. Thankfully, companies thinking along these lines promise to minimize the potential for fatigue in the digital realm and pave the way for a more vibrant online future.

Trend in action

Let's get kids talking

As we mentioned at the beginning of the report, kids tend to be very ambitious. Even as other fears subside, concerns about their future are more likely to persist, jeopardize mental health, and keep confidence down; and brands can help by speaking to this audience or raising awareness.

Our data suggests kids want to talk about the virus and its implications, so companies shouldn't make COVID-19 the elephant in the room. Overall, 4 in 10 12-15 year olds say talking about their feelings is important to them and this is enhanced among those with COVID-related anxieties. For example, 58% of those who're worried about falling behind at school and the future say this, alongside 50% who voice concerns about themselves and family members getting ill.

Brands can work to clarify the crisis, especially for young children. German toymaker Playmobil offers a great example of how they might alleviate some anxiety; its robot character ROBert details the COVID-19 **situation** in simple and reassuring terms. And U.S. broadcaster NBC has started producing an online-only version of its Nightly **News** for kids.

Companies can also support those worried about job prospects by establishing relationships with schools and highlighting opportunities. They can introduce programs that endorse their values and drive kids' aspirations by exposing them to possible careers – thereby making various lines of work more attainable.

03

Protecting kids online

How digitally-savvy are kids?

We've already established the links between home-schooling and digital fatigue among kids, but online education is only part of the story. COVID-19 shifted all after school activities and extracurriculars to the digital realm as well. Platforms like *Roblox* and Discord managed to shrink the physical distance between kids in the virtual world while at the same time **prioritizing** online safety.

And our data reflects these trends: talking to friends online (42%) after school is much more popular than actually seeing friends (28%). This is especially the case with 12-15s, with half preferring online channels to socialize with friends and only 3 in 10 opting to actually spend time with their friends in person. Using social media is also a more prominent after school activity (39%) than seeing friends.

Asking the parents about their kids' internet usage is quite revealing too, with older kids being more likely to be classified as heavy users than their younger counterparts (42% vs. 28%). The direction is clear: online channels and technology more broadly are growing in importance as kids get older.

Online spaces grow in importance as kids get older

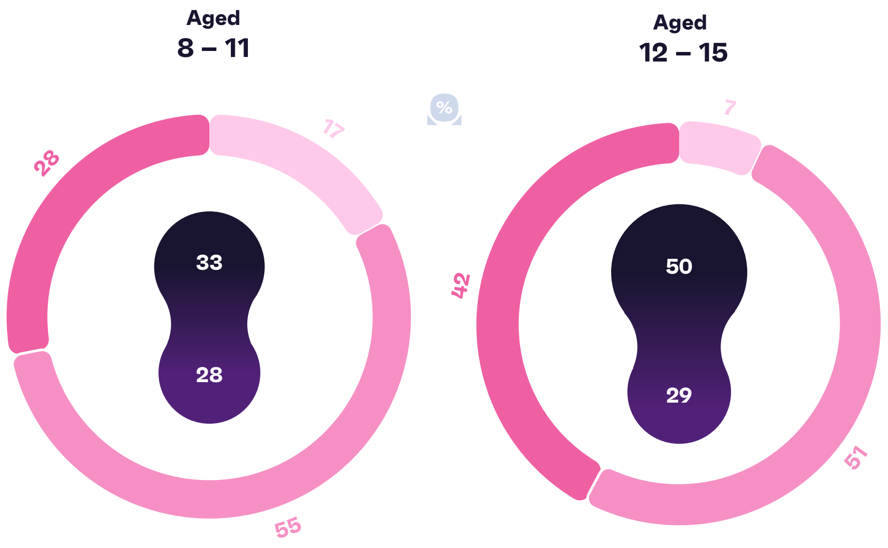
% of kids in these age groups...

...whose parents describe their internet usage in the following ways

- Light usage (Doesn't spend much time online)
- Medium usage (Spends a reasonable amount of time online)
- Heavy usage (Spends a lot of time online)

...who say they usually do the following after school

- % Talk to friends online
- % See friends



GWI Kids Q1 2021 15,418 kids aged 8-15

Self-awareness and critical thinking over parental policing

Mobiles aren't just the device kids use the most, but also where they're least supervised. Even among the youngest age group, 8-11 year olds, 35% use mobile phones without supervision. With older kids, it's games consoles that are on par with mobiles for lack of parental supervision among users of these devices, suggesting there could be a gap in the availability and/or awareness of safety software solutions for these devices.

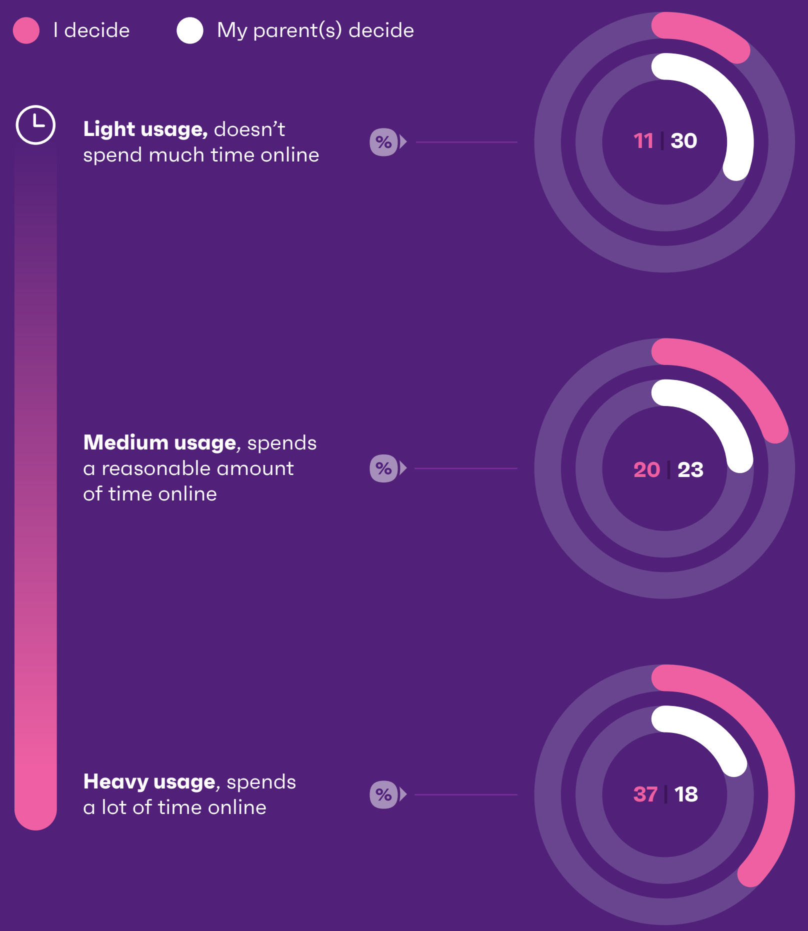
We can see a similar story when it comes to how much decision-making power kids have over what apps they can download. The bottom line is the longer kids spend online the more autonomy they have over what, or how much, content they're exposed to.

The root cause isn't the amount of time kids spend online or how much parental supervision and control there is though; most online spaces are simply designed with adults and not kids in mind. Our data shows that teens who decide for themselves what apps they can download are more likely, than those whose parents decide, to say they know how to be safe online (55% vs 46%). We should keep in mind though that these children are also more likely than average to admit they play adult-rated games which raises doubts over their ability to evaluate their own safety. Rather than policing their time online and the content they consume, teens should be taught and encouraged to think critically about their online habits.

The responsibility shouldn't lie on parents alone, software companies have a role to play as well. Gamified solutions like **CyberSprinters** are on a mission to teach kids how to be safe online while having fun. Designing interactive and educational experiences with today's youth in mind should be a priority in a world where 63% of 8-11 year olds say they use a phone, tablet, computer, or games console every day.

The more time kids spend online, the less supervised they are

% of kids in these groups who say the following about who decides which apps they can download



% of kids in the following age groups whose parents say they own/use these devices unsupervised

GWI Kids Q1 2021 15,418 kids aged 8-15

Keeping kids safe online

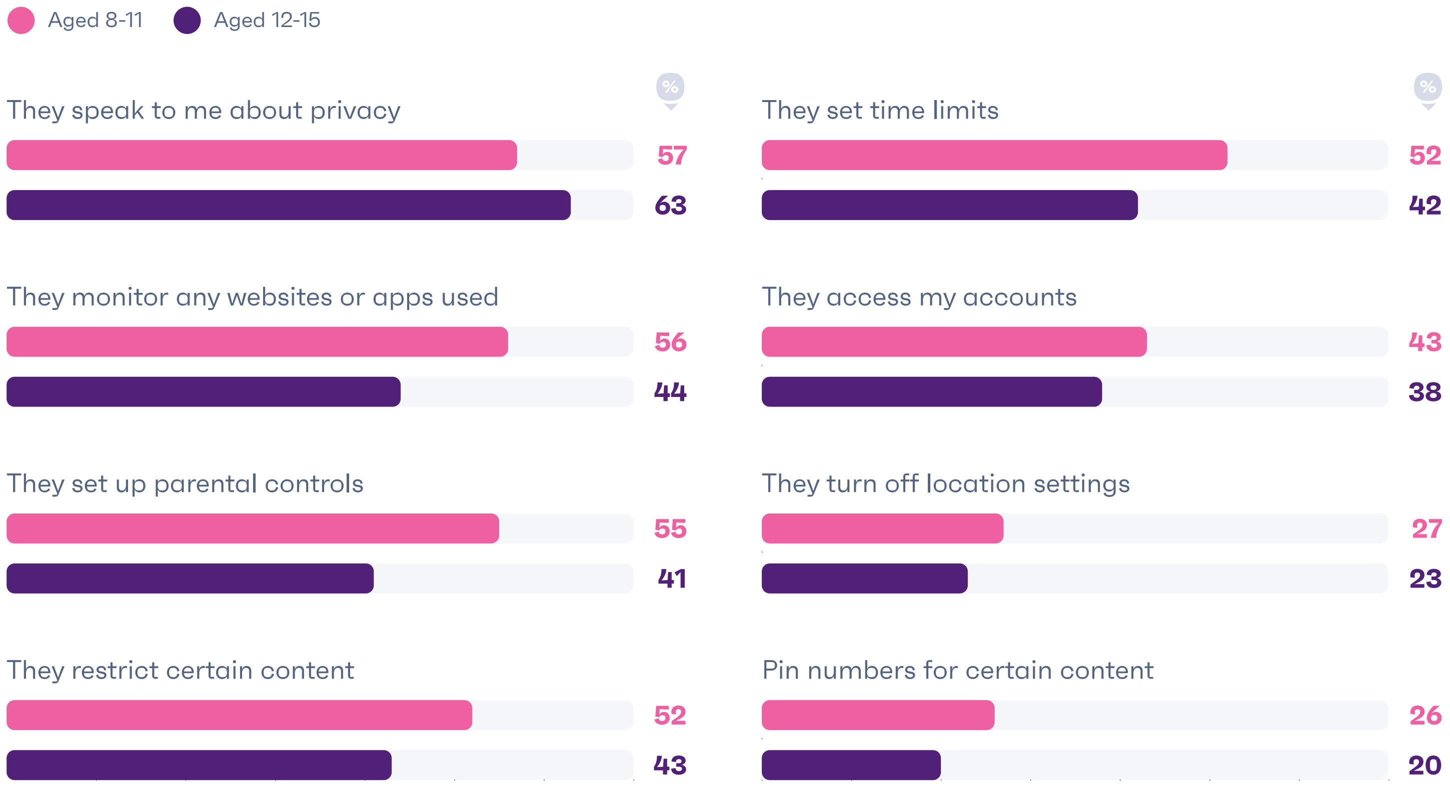
When it comes to the privacy measures parents use, we can see that the most common practice across both younger and older age groups is to speak about privacy. More hands-on approaches like monitoring websites or setting up parental controls are still common though, especially among parents of younger children. But the question is how effective are these privacy measures in keeping kids safe online?

If we take setting up time limits as an example, this has little to no effect when it comes to kids' actual frequency of going online or their social media usage. Compared to the average child, those whose parents set time limits are only marginally less likely to say they go online every day (82% vs 80%). Similarly, they're just as likely to say they use social media after school (50%), or to have at least 3 social media accounts (25%). Teens whose websites or apps are monitored are also just as likely as the average to say they can be someone else online (11%), or that they talk to people they don't know in real life (21%).

Simply put, kids' online safety and privacy go well beyond what the parents can do. It's also in the hands of Big Tech, advertisers, and ultimately legislation to ensure that kids are safeguarded online. All the major social platforms are already racing to provide parents with more control: **TikTok** is now allowing parents to set accounts to private, control who can see or comment on their child's videos, and disable the TikTok's search feature altogether; **Instagram** introduced a safety feature where adults aren't able to contact teens on the platform if they don't already follow them. Meanwhile, Facebook went as far as creating a whole new **ad-free network** for kids under the age of 13, though the company has had a hard time passing this through **regulators** so far.

A more hands-on approach with younger kids

% of kids in these age groups whose parents say they do the following to protect their child's privacy online



GWI Kids Q1 2021 15,418 kids aged 8-15

04

The next gen: kids and gaming

Kids game often, and across multiple devices

Gaming is without a doubt one of the biggest outlets for kids. The vast majority of kids play games, reaching a high of 93% for boys aged 8-11, and only dropping to 79% among girls aged 12-15 who say they've played video games in the past month.

Not only that, but gaming is the top interest for boys aged 8-15 out of a list of 30+ interests, overtaking things like films/movies, music, and TV shows. It's also the second highest interest among 8-11 year old girls. Many might have assumed gaming was popular among kids, but this shows just how big it really is.

Want more on what kids actually want from gaming brands?
Demo our data set

Gaming is part and parcel of kids' lives

Gaming is so closely integrated into kids' daily lives, and they're playing often. Just over 70% of gamers aged 8-15 say they play video games most days or every day. This only dips to 64% for girls, so regardless of age or gender, gaming is part and parcel of kids' routines.

When it comes to the devices they use, games consoles and smartphones battle it out to be the go-to device. Looking at our Core data among adults in the same markets, we see a vastly different device landscape. For adults, smartphones are the go-to gaming device by quite some margin. Even among younger Gen Zs, a significant gap remains; 74% use smartphones to game compared to 46% who use consoles. For kids, this gap doesn't exist. There's likely a couple of future scenarios here. The first: if consoles and mobiles are equally important to kids now, there's a chance this could continue as they get older. Consoles likely won't face the uphill battle against smartphones, like they do for adults now. The second: access to smartphones becomes easier as we get older, so it's possible that smartphones continue to be the go-to gaming device as kids enter adulthood. Only time will tell how this paves out.

The future of gaming will also be shaped by a cloud gaming strategy, which will go far beyond device loyalty. Microsoft recently announced its **plans** to offer Xbox games across more devices, like smart TVs – aiming to bring games to more people regardless of the device they own.

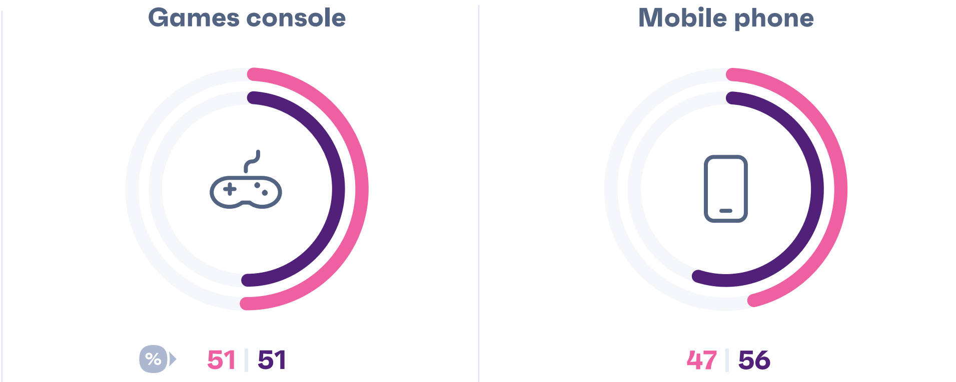
% of gamers who say they play video games most days/every day

Aged 8-11 Aged 12-15
Boys Girls

73% 71% 79% 64%

Consoles and smartphones battle it out as the top devices

% of gamers who say they play games on the following devices



GWI Kids Q1 2021 13,114 kids who play video games aged 8-15

It’s playtime: a look at gaming titles

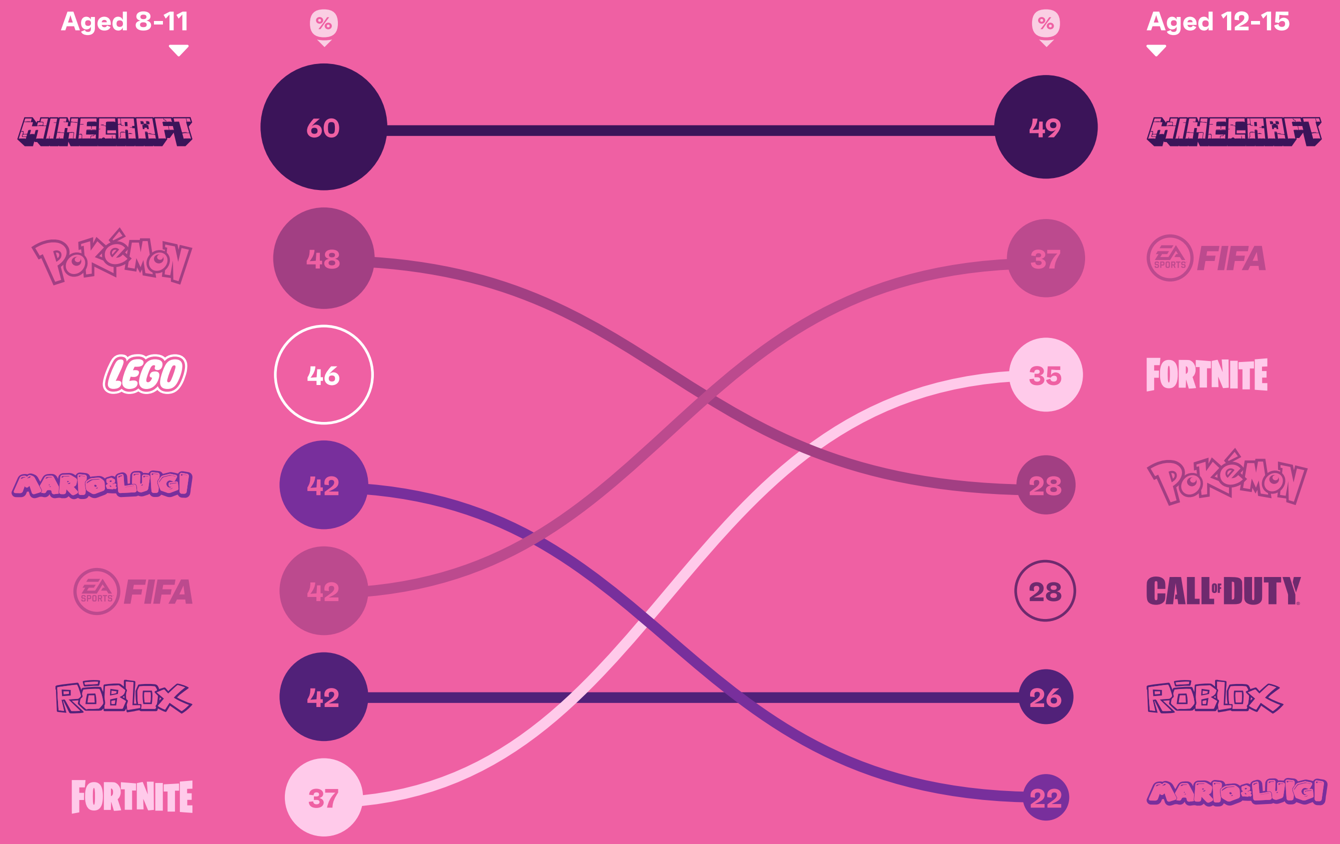
Video games have often faced scrutiny in the past for kids spending too much time on them. Or because there were very few educational or developmental aspects to games. At times, gaming was often seen as a time-wasting distraction.

This view has been reshaped in recent years, with the popularity of creation games like *Minecraft* and *Roblox* soaring; the former manages to nab the coveted first place across both age groups, and by quite a distance. Last year, the game generated just over **$400 million,** and saw big increases in usage during the pandemic. It’s also got the **seal of approval** from both parents and kids. The sandbox style game allows players to build worlds, flex their creative muscles, and fuel their imagination. Nintendo is also dipping its toes into **game development** too, with its *Game Builder Garage,* a new Switch game that will allow kids and adults to develop games on the Switch.

Gaming, in many ways, has become a learning tool. Research in the UK **found** that video games can support kids’ literacy skills, creativity, and empathy. Camp EDMO also **uses games** to teach social and emotional learning. The camp’s executive director, Eduardo A. Caballero said, *“We work with platforms that allow kids to be creative, to have a personality, to have feelings and they’re great tools for social and emotional learning”.* Gaming’s learning applications also **extend** to workplace settings too. Games that manage to have a strong creative and learning focus will continue to win over both kids and parents alike.

Top games titles: building, creating, connecting

% of gamers who say they play these games/have played these in the last month



GWI Kids Q1 2021 13,114 kids who play video games aged 8-15

Play together: the social factor

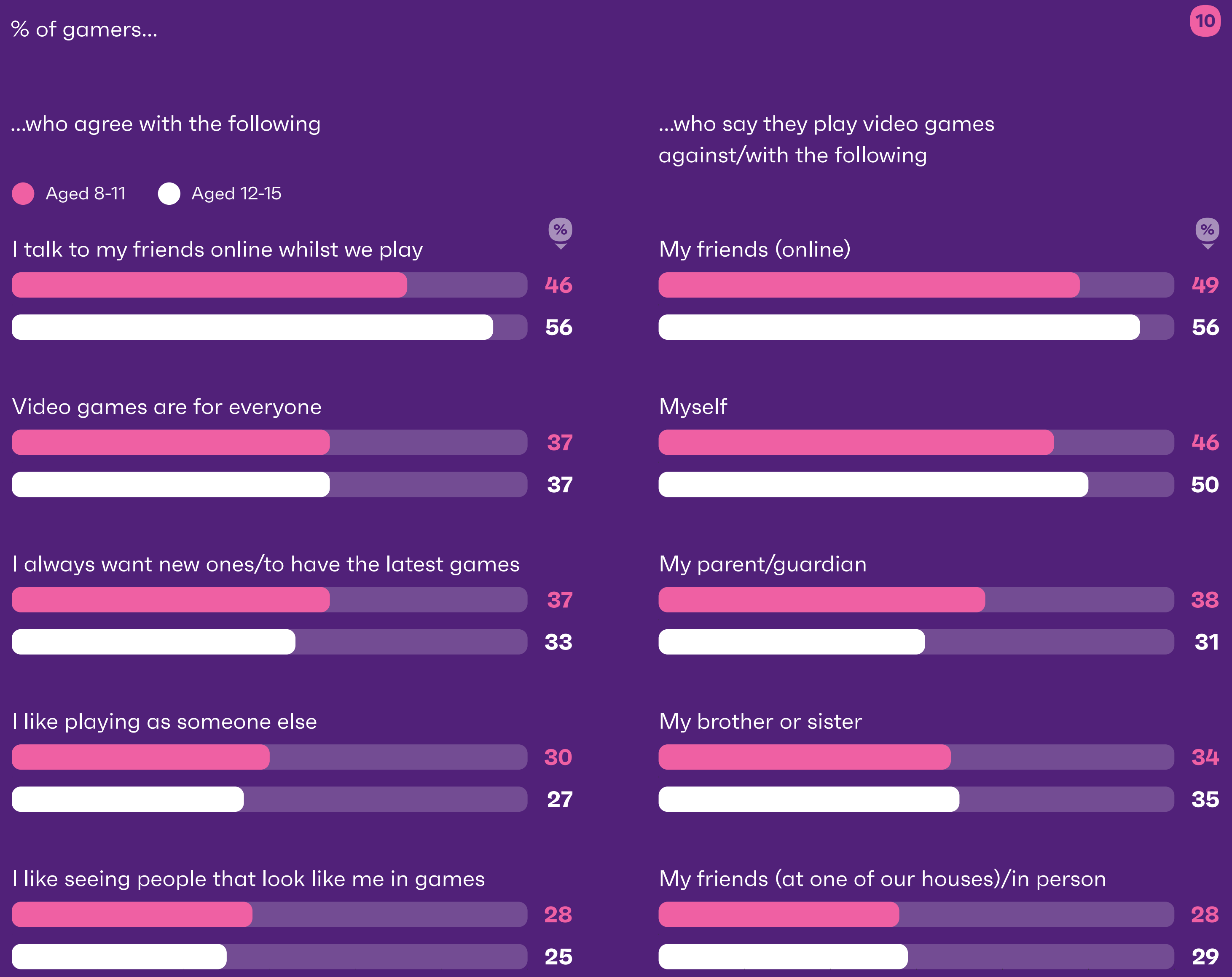
The pandemic arguably opened up many people's eyes to the social benefits of gaming. Kids, unable to see their friends in person or go to school, became socially deprived. Gaming helped to bridge this gap for many kids and families.

56% of young teens aged 12-15 and 46% aged 8-11 say they talk to their friends online while they play. Just over half of kid gamers also say they play with their friends online, with many others also playing with siblings or parents. Gaming isn't just a way to connect with friends, it also brings families together. In our report, **The gaming playbook,** we covered how growth in gamers is coming from older people, grandparents, and parents. Gaming is increasingly seen as **"family time",** with many families playing together, or learning from their children.

The social benefits of gaming also does wonders for mental health. As we covered earlier, kids share worries and anxieties, much like adults do. Research found that video games have **therapeutic benefits** for military veterans, and it's not hard to see why. Video games allow users to get lost in different worlds outside of their own, but one that they can control – a far cry from the uncertainty we face in real life. Whether you're building bridges or flower gardens in *Animal Crossing*, or creating games in *Roblox* – they're an immersive and enjoyable distraction away from the craziness of today.

The social aspect of gaming also extends into how kids discover video games. When asked how they find out about new games, their top source is friends or family members at 57% – way ahead of other sources like seeing ads online or on social media. This not only shows that young gamers are vocal (much like their older counterparts), but also how powerful word-of-mouth is in the gaming purchase journey. If a kid's friend raves about a game they're playing, chances are the same kid will want to join in too.

Gaming is a social space for many



GWI Kids Q1 2021 13,114 kids who play video games aged 8-15

05

TV and music behaviors

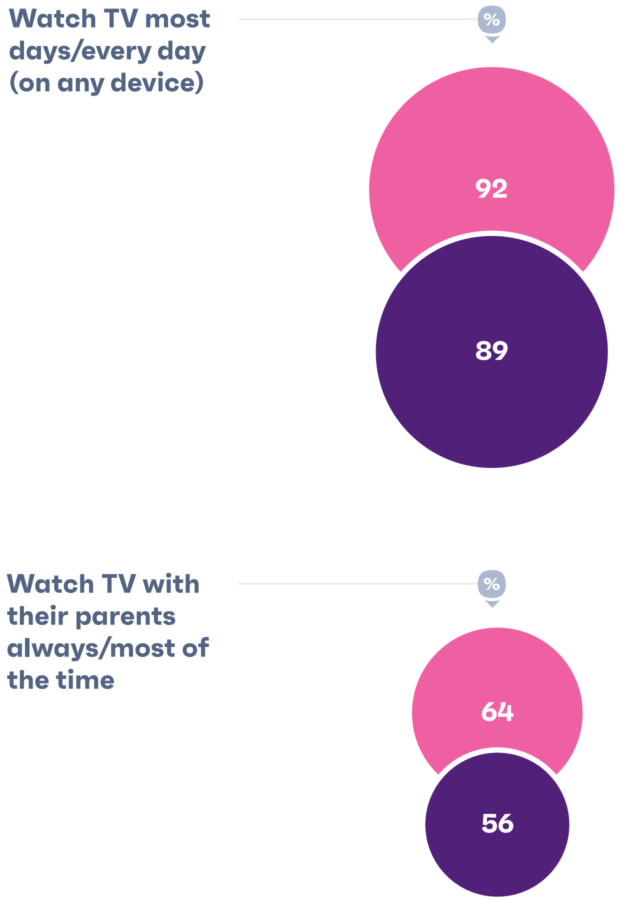
TV: time for all the family

Throughout the pandemic, gaming wasn't the only activity that helped connect and entertain families. Pretty much all kids say they watch TV every day or most days. And unlike gaming, which is mostly played with friends or alone, most kids watch TV with their parents. 56% of 12-15s say they watch TV programs with their parents always or most of the time, rising to 64% among 8-11s. Even as kids get older, TV time is family time.

It's a family affair

% of kids who say they...

Aged 8-11 Aged 12-15



GWI Kids Q1 2021 15,418 kids aged 8-15, and 15,237 kids who watch TV

And it's big business: last year, consumers spent **$35 billion** on video streaming, an increase of 63%. Notably, around a third of young teens aged 12-15 say they decide which TV shows/movies they watch, with a further 44% saying they decide with their parents. Granted this is what kids say, but it's still a strong indication that they likely have more influence than is often realized. This holds even more weight considering that over 1 in 3 of this age group say they watch the same TV shows as their friends; and we know just how influential peers are.

On top of this, just over half of 12-15s also say they watch a lot of different types of TV shows/movies, suggesting they could also influence the number of subscriptions their household pays for. Using our Zeitgeist research from May across 4 markets*, we see evidence of differences between those who are parents, and those who aren't. For example, 83% of parents have at least one subscription service, compared to 77% of non-parents. Parents are also more likely than non-parents to have subscribed to a new subscription during the pandemic (48% vs. 43%). The good news for streaming providers is the majority of parents (76%) aren't considering canceling a subscription service either.

*UK, U.S.A., Germany, France

Getting the kids (and adults) on side

Big players like Netflix, YouTube, and Disney+, as well as challengers like Paramount+, are all in a race to own a slice of the family entertainment pie. New programs aimed at adults aren't enough on their own to stop people from going elsewhere. Programming that caters to kids and families alike creates the kind of relationship that keeps people hooked.

In a space that's so crowded, it's the unique IP that sets companies apart. With Disney+, for example, execs believe that **interpretations of popular characters** will boost their offering. Nickelodeon is now the main reason why people are **signing up to Paramount+** – with SpongeBob topping watchlists. This not only shows the power of a good franchise, and a highly recognizable character, but it shows the power of a strong kids' brand too – Nickelodeon and Disney are known as family brands.

What drives retention will be how well brands understand the family viewing dynamic and what viewers expect. From our May Zeitgeist research, we know that having a large amount of content, new content regularly added, and original content are significant drivers to purchase subscriptions.

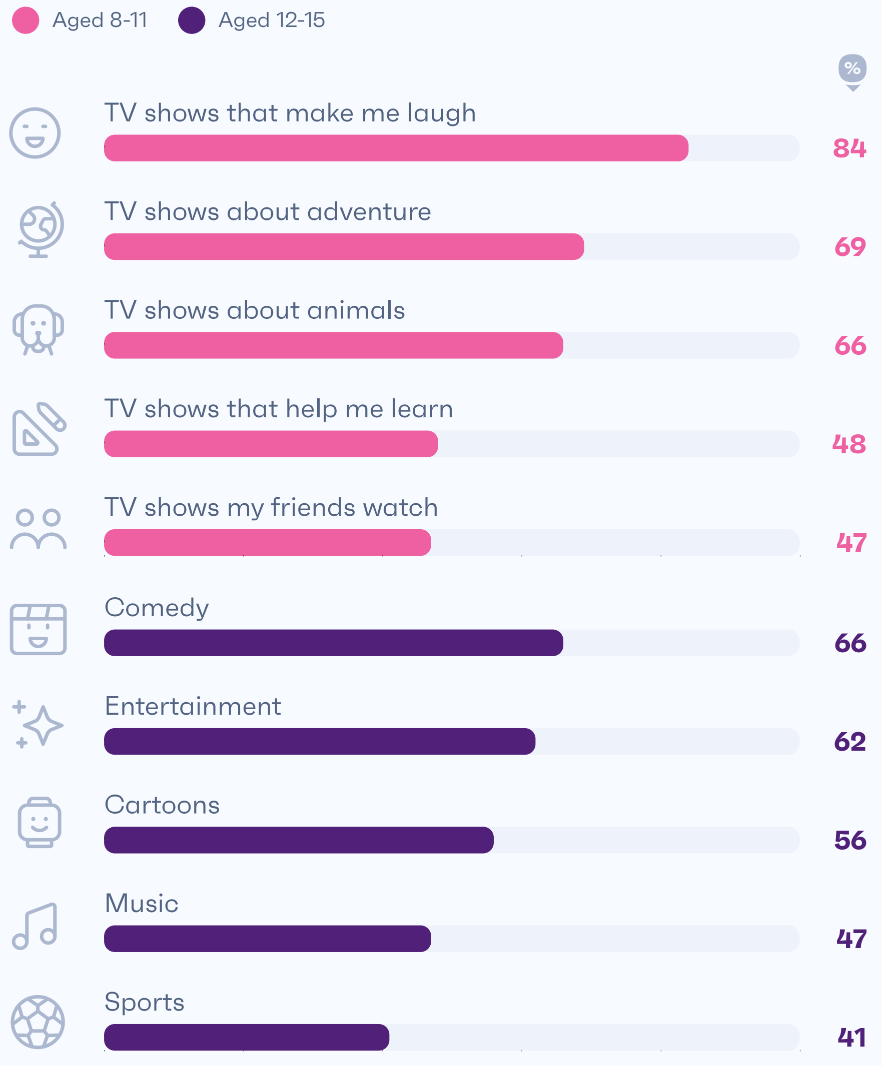
Understanding the type of content that's in demand by kids also helps to guide streamers to create content that lands. Across both age groups, light-hearted comedy shows are in hot demand; which makes even more sense after the year we've had.

> "You know as a parent that you'll go without eating before you take something away from your child that they like. Kids content is an amazing retention tool.
>
> **BRIAN ROBBINS,**
> President of ViacomCBS' Nickelodeon

TV shows in hot demand

12

% of kids who watch the following types of TV shows



GWI Kids Q1 2021 15,237 kids who watch TV aged 8-15

Music allows kids to express themselves

Music enables kids to express themselves and their emotions, without saying any words at all. At a time when kids are starting to form their own identity, music is a key part of this. Even as adults, hearing music from when we were younger often evokes strong emotional feelings, and takes us back to certain memories or life events.

There's many different reasons why kids listen to music. Many do so when they're doing home-based activities like homework or doing chores. Many others, particularly boys, listen to music when they're gaming. Looking back at iconic franchises like *Grand Theft Auto* or *Tony Hawk's*, music has long been used to elevate the gaming experience. This has since evolved into virtual experiences, like Travis Scott's astronomical *Fortnite* **performance** last year. Spotify also found that 52% of Spotify gamers say music is a large part of their **gaming experience,** with many tuning into gaming-related playlists. For brands and artists, this opens up new opportunities to connect with gamers in a way that resonates with them.

For girls specifically, music is a powerful tool for emotional release. 61% of girls listen to music when they're feeling happy compared to 51% for boys. More strikingly, 2 in 5 girls aged 12-15 say they listen to music when they're feeling sad, which is way ahead of younger kids and boys. We also know that girls this age are more likely than boys to have stronger COVID-related concerns, such as worrying about the future, so music can act as a crutch. Research studies found that music helped to **reduce stress.** This shows that music not only helps teens express themselves, but affects them on a much deeper, emotional level as well.

81%

of 12-15 year olds and

73%

of 8-11 year olds say they listen to music most days or every day

Music: the soundtrack of kids' lives

13

% of kids who say they listen to music when they're...

	Aged 8-11 Male	Aged 8-11 Female	Aged 12-15 Male	Aged 12-15 Female
Feeling happy	51	61	51	61
Gaming	42	30	43	28
Doing nothing/chilling/relaxing	41	49	63	68
Doing chores	25	33	33	49
Dancing	25	53	19	46
Doing homework	24	27	37	47
Feeling sad	15	19	25	39
Doing something else	11	11	17	23

GWI Kids Q1 2021 · 14,137 kids who listen to music aged 8-15

Where are they listening?

The audio listening wars: top 3 platforms by market

% of kids aged 12-15 who listen to music, podcasts, or audiobooks on the following platforms

Market	#1	%	#2	%	#3	%
Australia	Spotify	62	YouTube	45	Apple Music	22
Brazil	YouTube	58	Spotify	51	deezer	15
Canada	Spotify	50	YouTube	45	Apple Music	17
France	YouTube	45	Spotify	31	deezer	20
Germany	Spotify	41	YouTube	35	Amazon music	28
Italy	Spotify	51	YouTube	49	Amazon music	23
Malaysia	YouTube	75	Spotify	48	Apple Music	10
Mexico	Spotify	70	YouTube	58	Amazon music	18
Poland	YouTube	65	Spotify	42	Apple Music	13
South Africa	YouTube	56	Spotify	46	deezer	15
Spain	Spotify	63	YouTube	43	Amazon music	24
Turkey	YouTube	69	Spotify	59	deezer	24
UK	Spotify	50	YouTube	43	Amazon music	24
U.S.A	YouTube	66	Apple Music	37	Spotify	36

*Select markets only

GWI Kids Q1 2021

14,137 kids who listen to music aged 8-15

06

Social media and commerce

It's not out with the old

There have been **reports** of young audiences shunning traditional social media platforms in favor of video-based ones like Snapchat and TikTok. This has implications for brands seeking authentic conversations with their teen followers, with some questioning the value of maintaining a presence on such sites. Yet, our data reinforces why they shouldn't.

Like Gen Zs (aged 16-24), 13-15s also lean more heavily on Instagram than Facebook; but the latter still places ahead of newer competitors. What's more, as many teens say their favorite social media service is Facebook as Instagram, which is a testament to its staying power.

We do have to pay homage to the immense amount of ground that TikTok has covered over the last year. In our Core research, monthly usage of TikTok among Gen Zs more than tripled between 2019 and Q3 2020 across the markets included in our Kids research. While we can't make a direct comparison, it's clear 13-15s are taking TikTok engagement to a whole new level.

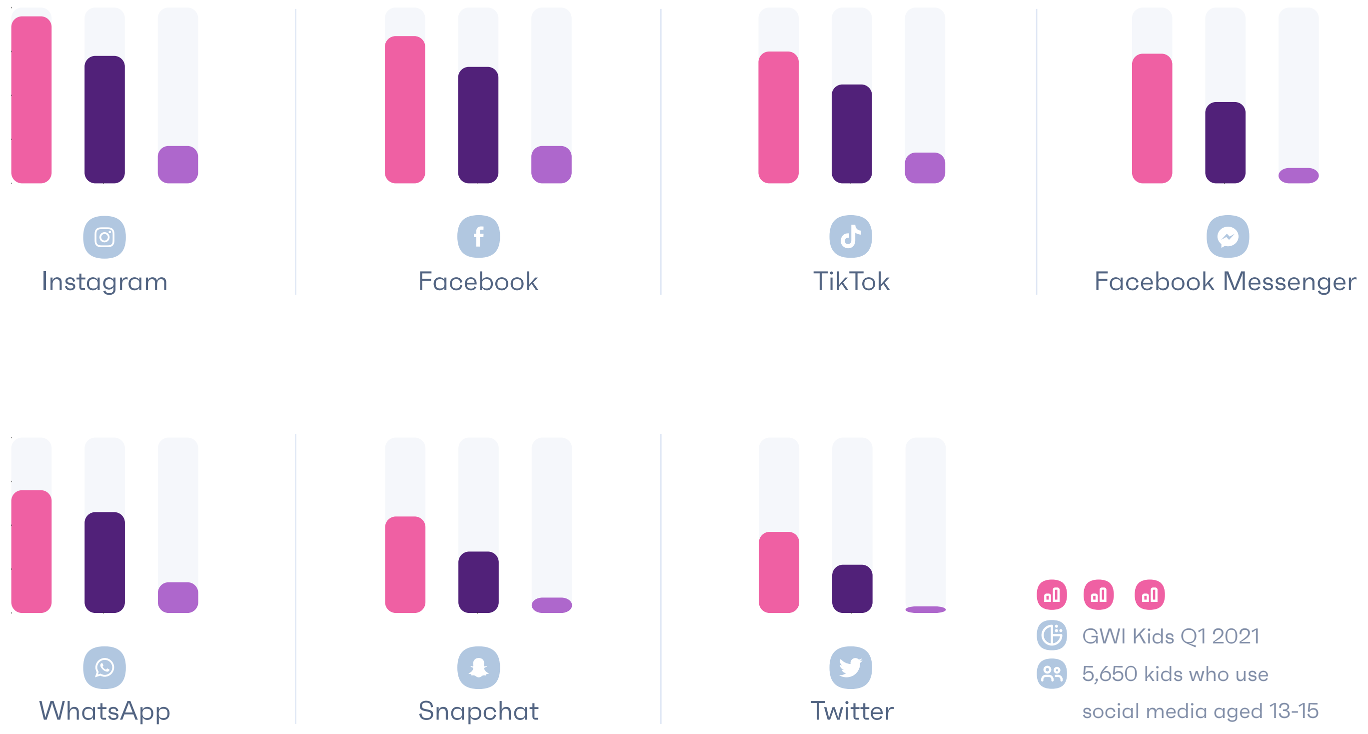
Overall, this group has a very diverse social media presence; but because several sites have high engagement figures, those reaching out to teens online don't need to be everywhere at once. They can meet the majority of this audience on one or two select platforms.

Want more on what drives kids to use social media? **Demo our data set**

Facebook has proven its staying power

% of 13-15s who use the below platforms weekly/daily and say the following is their favorite network

Weekly Daily Favorite platform



GWI Kids Q1 2021
5,650 kids who use social media aged 13-15

Influencer engagement is high, but so is media literacy

Influencers as ambassadors, not icons

Influencers resonate strongly with young audiences. Unlike adults, teens are more likely to say they mainly log onto social platforms to see influencer content than brand posts, which highlights the level of reach they've attained.

Generally more fashion-conscious, girls are at the forefront of this trend; 42% say following influencers is a top use case for social media, compared to 32% of boys. And in contrast to other 12-15 year old girls, influencer followers are 37% more likely to say having the latest fashion is important.

16

% of 12-15 year old social media users who...

Say the following are one of their main reasons for using social platforms

	%
Following celebrities/influencers	38
Seeing posts from my favorite brands	32
Getting style inspiration	23

Agree with the following

	%
My role models are people in my life	41
My role models are famous people	16

Say the following about social media

	%
It reflects other peoples' real life	21
It shows my real life	16

GWI Kids Q1 2021 · 7,522 kids who use social media aged 12-15

That being said, this group's interests are varied and suggest how influencers can drive self-development. Many female followers are passionate about being healthy (53%), the environment (49%), and books (46%); and various influencers promote good lifestyles. A number have started a TikTok trend called **'BookTok',** helping kids discover new titles.

While celebrity culture has been **linked** to a rise in mental illness and materialism, its impact is often overstated. The majority of teens are aware that social media isn't an accurate reflection of people's lives, so efforts to enhance kids' media literacy clearly haven't been in vain.

Kids are also 2.7x more likely to say their role models are people in real life than famous people. It's been **argued** that the events of 2020 prompted an ideological shift away from polished influencers and onto role models young people can relate to; and we're able to confirm a strong focus on the latter.

Part of Mattel's campaign (#ThankYouHeroes) is a line of **toys** that immortalizes the delivery drivers and frontline workers that kept our communities up and running during the pandemic. Likewise, recent kid's books like **"10 Hidden Heroes"** both encourage and demonstrate enhanced interest in the 'everyday hero'.

What content tomorrow's consumers want

Few teens are making regular digital purchases just yet; 15% of 12-15s have made one in the last week, rising to a quarter among those with a bank account they can access. The focus should therefore be on establishing bonds with this audience that can endure into adulthood.

Around 1 in 3 teens mainly use social media to engage with their favorite brands, and they have certain content preferences. These attitudes ultimately offer a lesson in how to speak to tomorrow's shoppers.

For starters, funny posts are one of the most common reasons teens log onto social networks, closely followed by memes. This type of content not only makes fans laugh, but also fosters a sense of community by communicating shared attitudes and situations. For example, *Roblox*'s TikTok **account** is filled with funny experiences and terms that only players would understand.

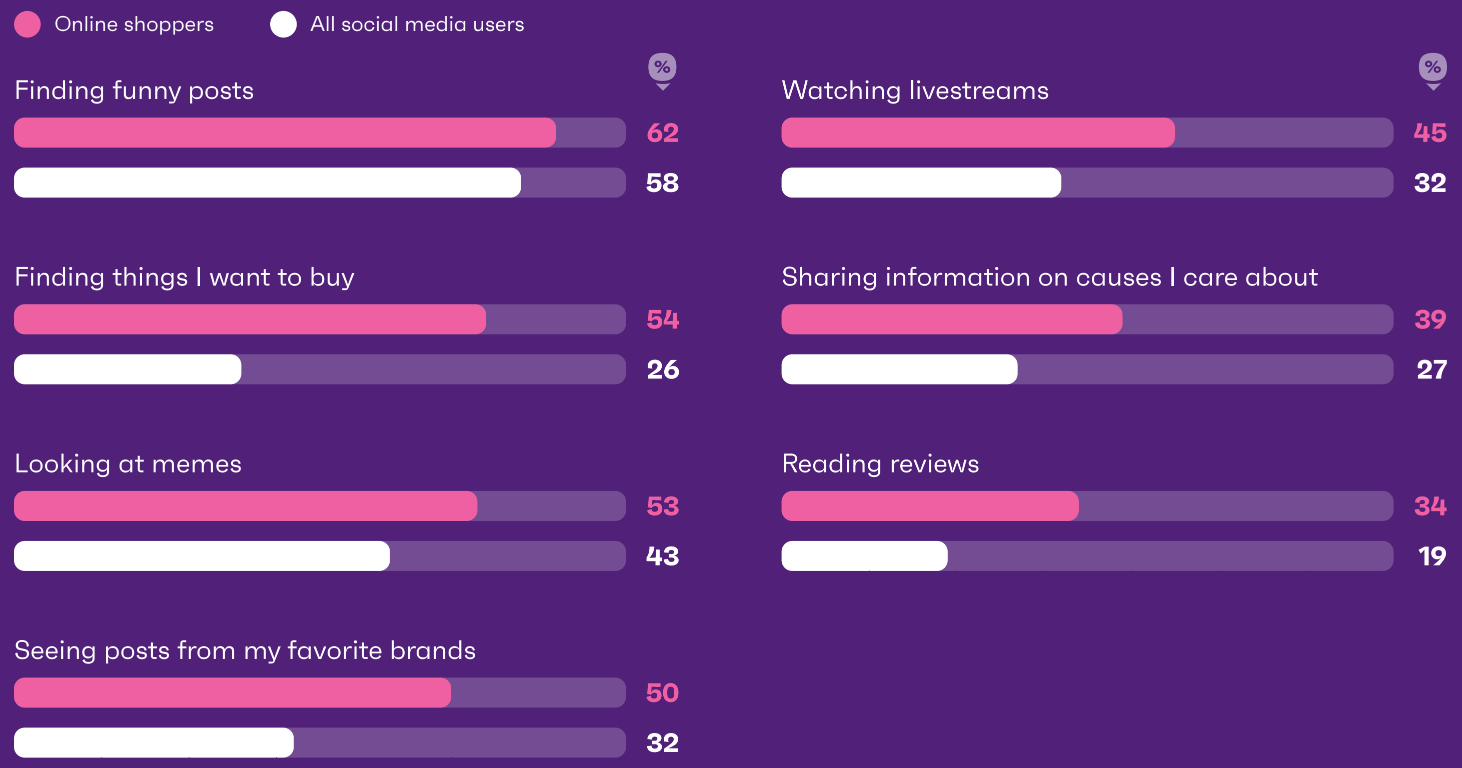
Relatable humor can be balanced with posts that expose eye-opening information about relevant social causes that teens can share with their network – which over a quarter cite as a main reason for using social media.

Subscription offerings can also give companies a leg up. Because parents want to support their kids' passions, various legacy publishers like America's Test Kitchen are increasingly working to encourage positive habits at an early age and link these to their brand, which is a precursor for loyalty later in life.

17

The most in-demand content among teens

% of social media users/online shoppers who say the following are one of their main reasons for using social platforms



GWI Kids Q1 2021 | 7,522 kids who use social media aged 12-15, and 1,131 who have bought something online in the last week

The role of fintech in kids' lives

Today, over 6 in every 10 kids have a bank account. The fact that this is nearly as many as those who have their own mobile phones (61% vs 65%) shows that financial inclusion is as important as technology for this generation.

This hasn't gone unnoticed, with countless investors and businesses aiming to facilitate a cashless future for the next generation of spenders. To put this into perspective, in the past five years alone at least **$535 million** has been invested in deals with fintech startups that offer services for children, young people, and parents.

Greenlight, Vybe, and **Step** are among some of the fintech names focusing on kids and teens to have funding rounds in full swing right now. Whether via no-fee services or educational resources, these challengers are making sure they attract and engage what could be a very loyal customer base in the future.

Want more answers?

Our new GWI Kids data set asks the questions others don't to get you a true view of how kids think. Start kid-proofing your ideas with trusted surveys, built by kids.

Learn more

Appendix

1. Which of these describes you? (I am confident) • Which of these do you agree with? (Boys/girls can do any job they want to) • Which of these things are important to you? (Sharing my views/opinions)

2. Which of these things are important to you? (Caring for the planet, Recycling, Protecting people from bullying, Everyone being treated the same) • Which of these are you interested in? (The environment, Climate change)

3. Has the coronavirus/COVID-19 pandemic made you worry about any of these things?

4. Which of these do you agree with about going online? (I spend too much time online)

5. What do you usually do after school? (Talk to friends online, See friends) • Thinking about the child taking this survey, how would you describe their internet usage?

6. Which of the following device(s) can the child taking this survey use unsupervised? • Which of the following device(s) does the child taking this survey have access to/own? • Who usually decides which apps you can download?

7. Which of the following do you do to protect your child's privacy online?

8. I play video games... (8-11 Only) / How often do you play video games? (12-15 Only) • I play video games on a... (8-11 Only) / What have you played video games on in the last month? (last 30 days) (12-15 Only)

9. Have you ever played these games? (8-11 Only) / Have you played any of the games listed below in the last month? (Last 30 days) (12-15 Only)

10. Which of these do you agree with about video games? • When I play video games I am normally playing against... (8-11 Only) / Who do you usually play video games with? (12-15 Only)

11. How often do you watch TV? (on any device) • How often do you watch TV programs with your parents?

12. I like to watch TV shows that... / I like to watch TV shows that are about... • What sorts of TV shows do you watch?

13. I listen to music when I'm...

14. Which of these do you use to listen to music, podcasts or audiobooks?

15. Which of these have you used in the last week? • Which of these do you use about/more than once a day? • Which of these is your favorite to use?

16. What are your main reasons for using social media? • Which of these do you agree with? • Which of these do you agree with about social media?

17. What are your main reasons for using social media?

Notes on methodology

Introduction

GWI Kids explores the attitudes and behaviors of internet users aged 8-15 across 14 markets globally. This is done by interviewing both children and their parents/guardians, providing a complete picture of a child's actions and opinions as well as the context in which they live.

Our research

GWI Kids has been meticulously designed so that all questions are mobile friendly, and easy to understand. This means that there are no grids or long lists, which could easily lead to respondents getting confused or fatigued.

The survey can be taken on the device the respondent feels most comfortable using, PC/Desktop, Laptop, Mobile or Tablet. The majority of questions are asked to all children, but some are asked differently to 8-11 years olds and 12-15 year olds respectively. The questions asked to younger respondents tend to be simpler and contain fewer options.

Additionally, age appropriate options are provided for each age group. We have a number of checks in place to ensure that the questions are being answered by the child in question, rather than by a parent/guardian on their behalf. We also employ routing to ensure that respondents are not asked questions which would be irrelevant to them. For example, if someone says they do not use any social networks, then they are not asked follow-up questions about this behavior.

Our quotas

To ensure that the GWI Kids sample is representative of the children aged 8-15 who use the internet, we set quotas on age and gender. These quotas are interlocking, meaning they are broken down into sub-groups such as "Males 8-11".

Sample size by market

This report draws insights from GWI's Q1 2021 wave of research across 14 countries, with a global sample of 15,418 respondents.

Australia	943
Brazil	1,957
Canada	950
France	967
Germany	959
Italy	964
Malaysia	983
Mexico	982
Poland	978
South Africa	984
Spain	974
Turkey	958
UK	953
USA	1,866

Internet penetration estimates among 8-15s 2021

The above is derived from data sourced from national censuses and international organizations, forecasted and adapted by GWI to fit the relevant age group.

GWI Kids represents children aged 8-15 who use the internet. It does not therefore overlap with GWI Core, which represents internet users aged 16-64. Because children who do not use the internet are not represented in GWI Kids, it's important to remember that internet penetration rates vary significantly between the different countries included in the study (from highs of around 90% to lows of around 60%). Because of this, the demographic composition of the online population may look very different from one market to the next.

Where a market has a high internet penetration rate, its online population will be relatively similar to its total population. However, in markets with a lower internet penetration, those who do use the internet tend to be more urban and affluent than those who do not. This will be reflected in the GWI Kids sample; as such, the results shown in our platform will represent the mindsets, and contexts, of children who have access to the internet.

	%
Australia	98
Brazil	86
Canada	99
France	97
Germany	99
Italy	87
Malaysia	97
Mexico	77
Poland	98
South Africa	73
Spain	98
Turkey	77
UK	97
USA	98

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