



**Kids &
DIGITAL**



France

December 2019 research
for the April 3rd, 2020 webinar

 **LICENSING
INTERNATIONAL**
FRANCE

Kids & Digital looks at kids' digital universe usage in 12 markets ... so far!



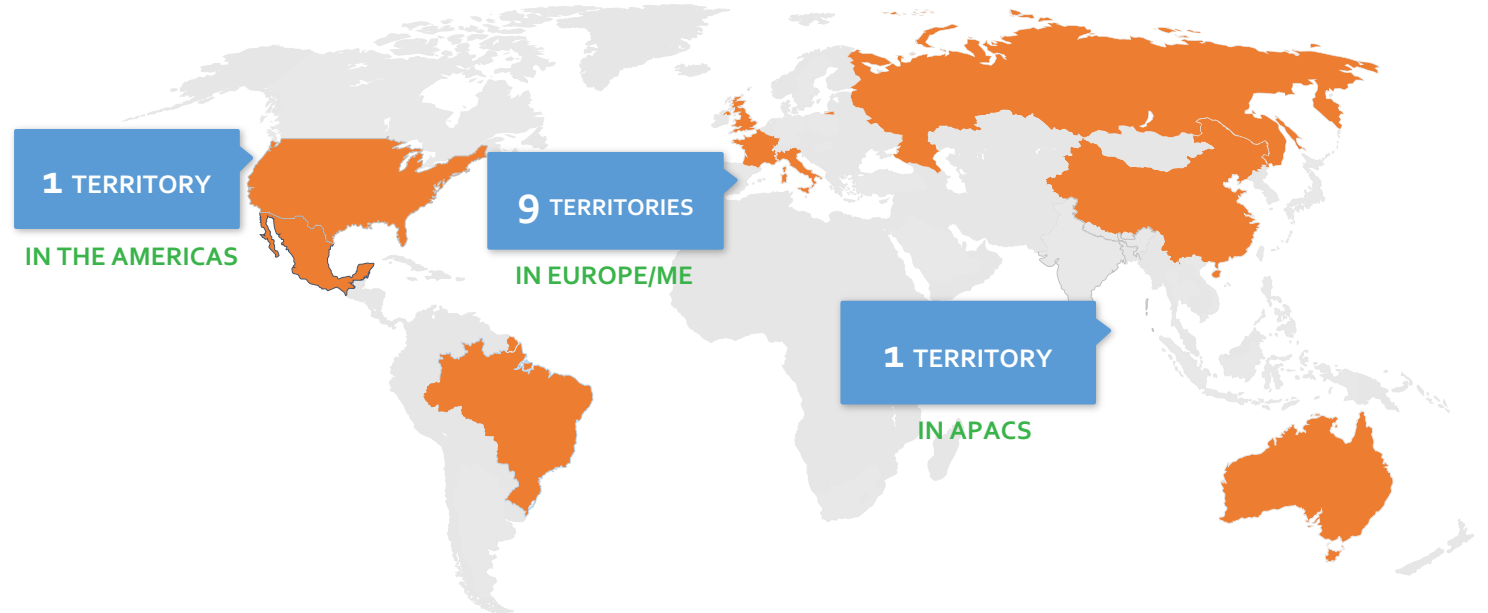
13,800 kids 4-11 and their parents about their access, usage and behaviors with digital devices / services / content and their associated attitudes

Dual Interviewing

Over 80 Questions

300+ brands, from digital & Entertainment

Option to submit your own questions to the next wave



Global Perspective, reports are available in 12 countries.

What's in there?



Demographics & Profiles

Who are digital kids?

What is the role of the parents and friends in acquiring and practicing digital content?

Ownership & Access

What is the reach of each digital platform and channel among kids?

What are the key market trends?

Usage Of All Digital Activities

What does a day in the life of kids look like?

How much of the digital activities do they practice?

How do kids use digital devices & services?

Multi-tasking & Digital Preference

What are the key patterns in multi-tasking?

What is the intensity with regards to the different platforms?

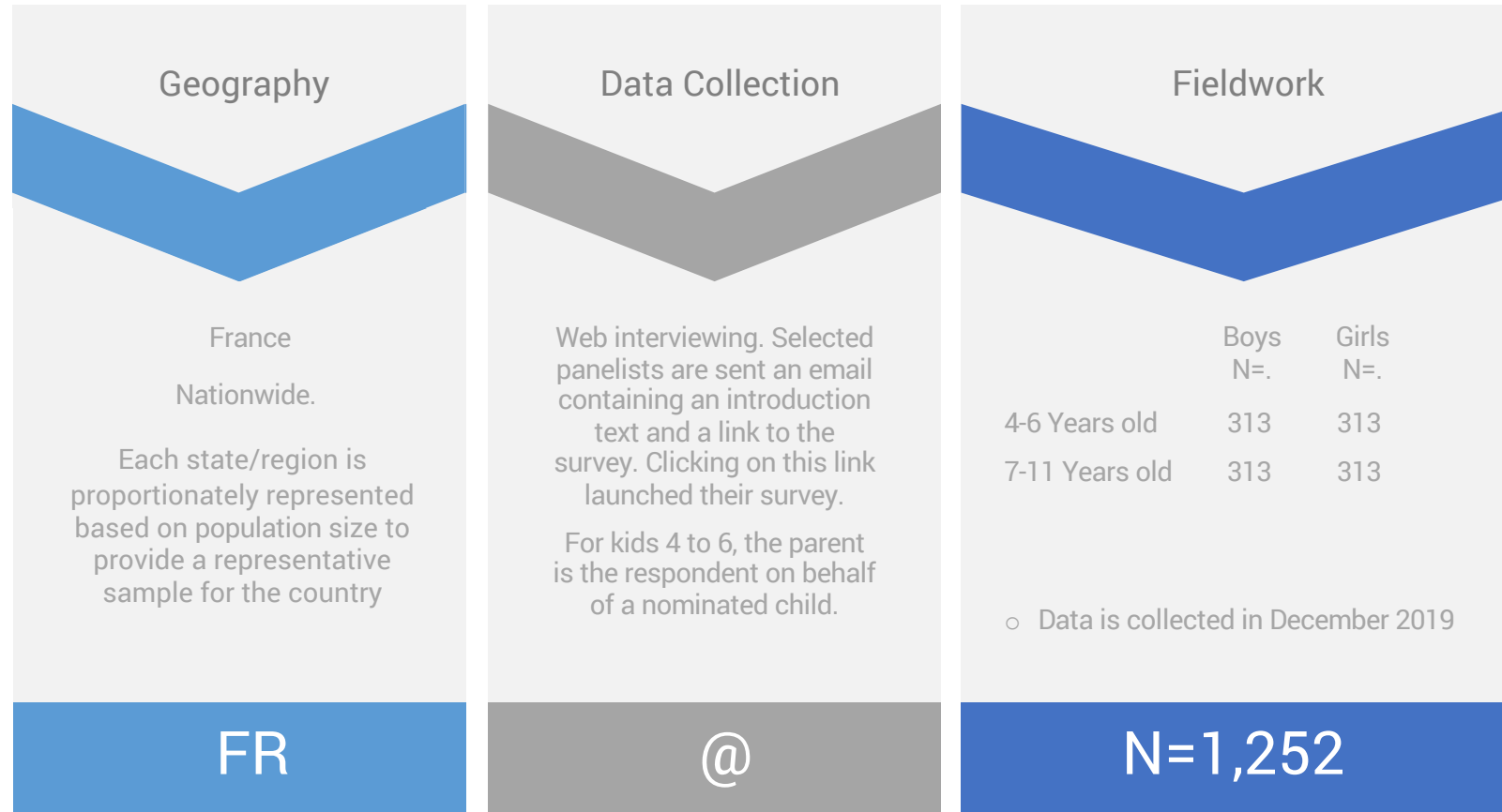
What is the most preferred screen?

Brand Usage

How and why do kids engage with the brands?

What are the brands they value the most, off-and on-digital?

The survey is constructed to ascertain the behaviors within each age group and gender and their merchandise appeal



Digital Equipment



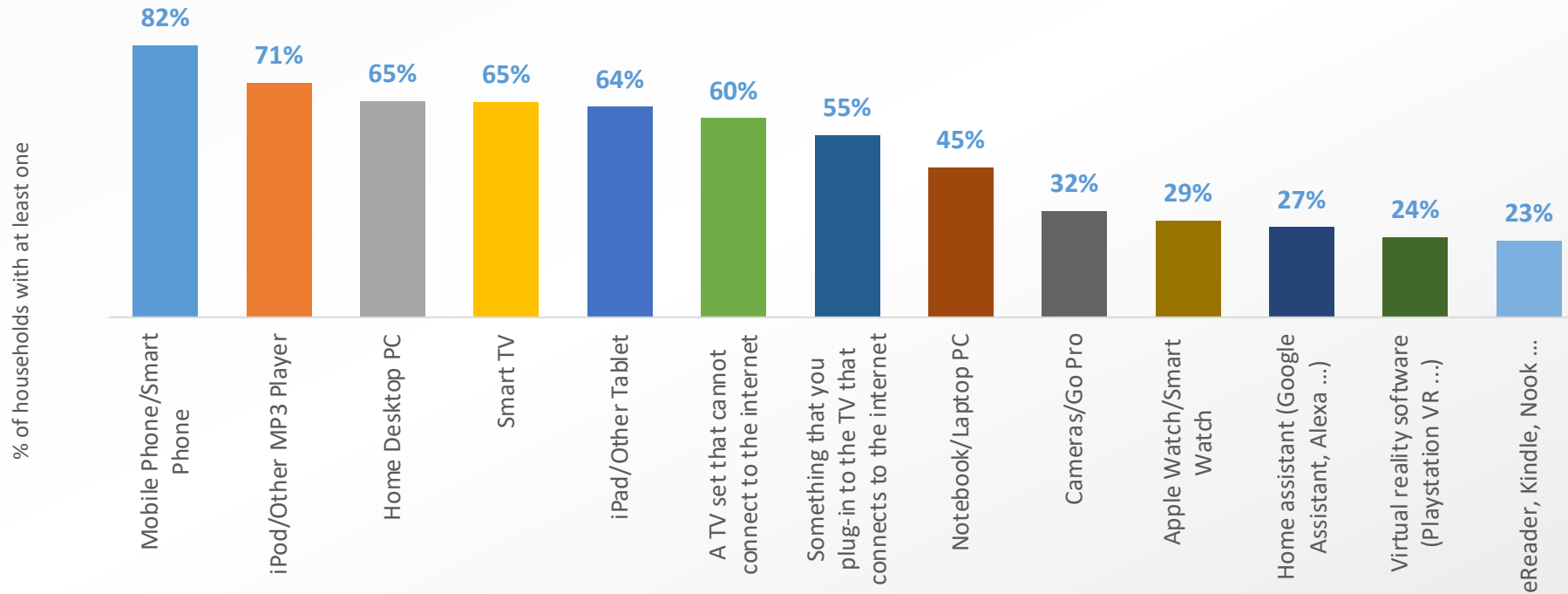
Kids are connected: access to mobile phones, tablets, the Internet... 27% even can access a voice-assistant while 24% access a VR software



Kids access – Electronic entertainment

Do you or anyone in your household, currently own any of the following products?

France - Equipment - Kids Access - Kids 4-11



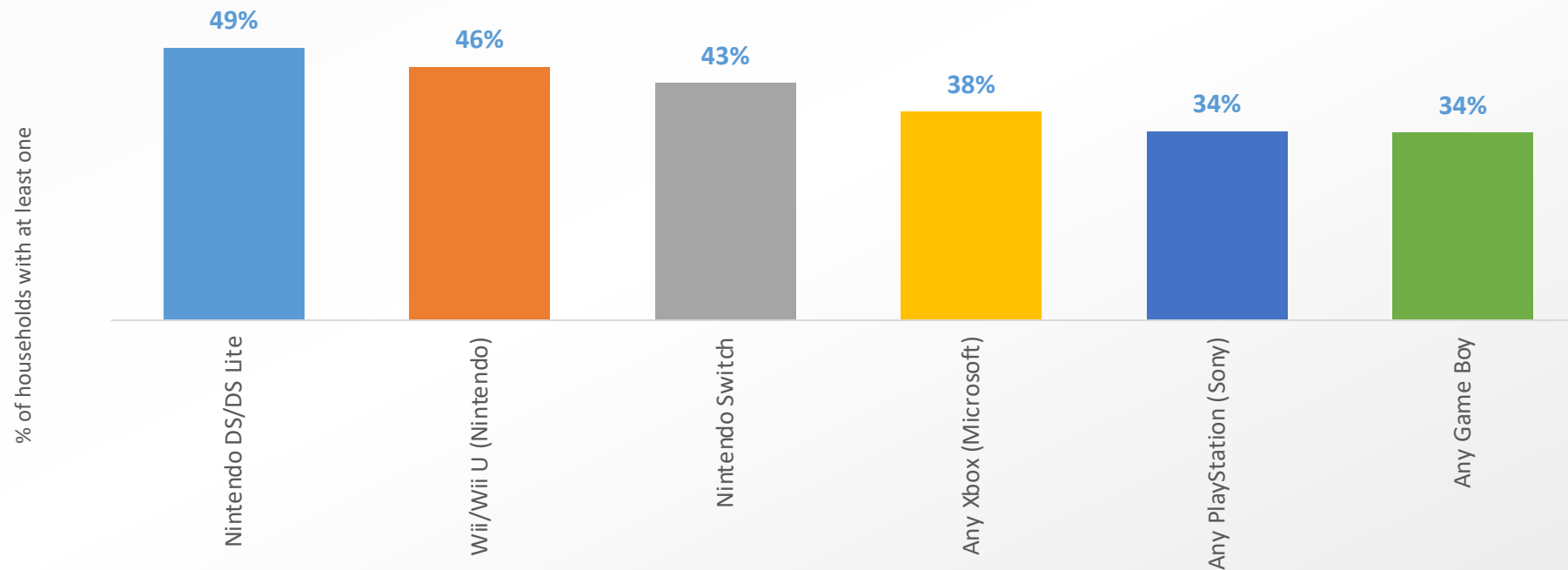
Kids also have access to various video games; with 49% of them having access to a Nintendo DS (the most accessed device). Nintendo tops the access among French kids 4 to 11



Kids access – Videogames

Do you or anyone in your household, currently own any of the following products?

France - Equipment - Kids Access - Kids 4-11



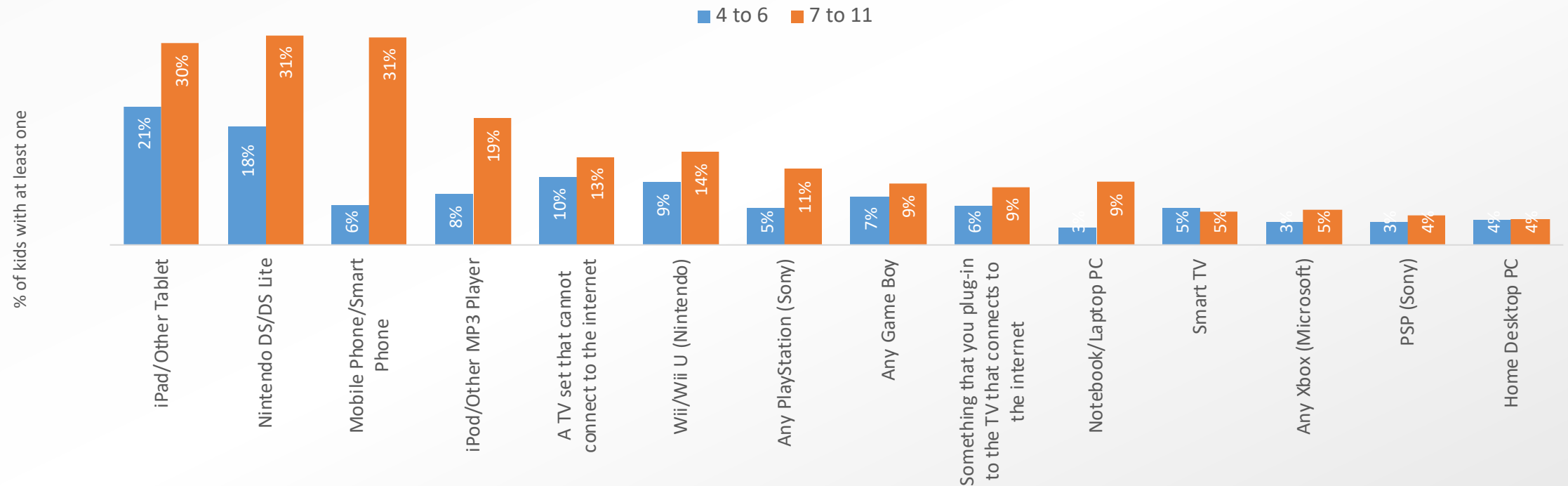
This is a different story when it comes to the ownership of these: age is key!



Kids ownership – Electronic entertainment and Videogames

Do you or anyone in your household, currently own any of the following products?

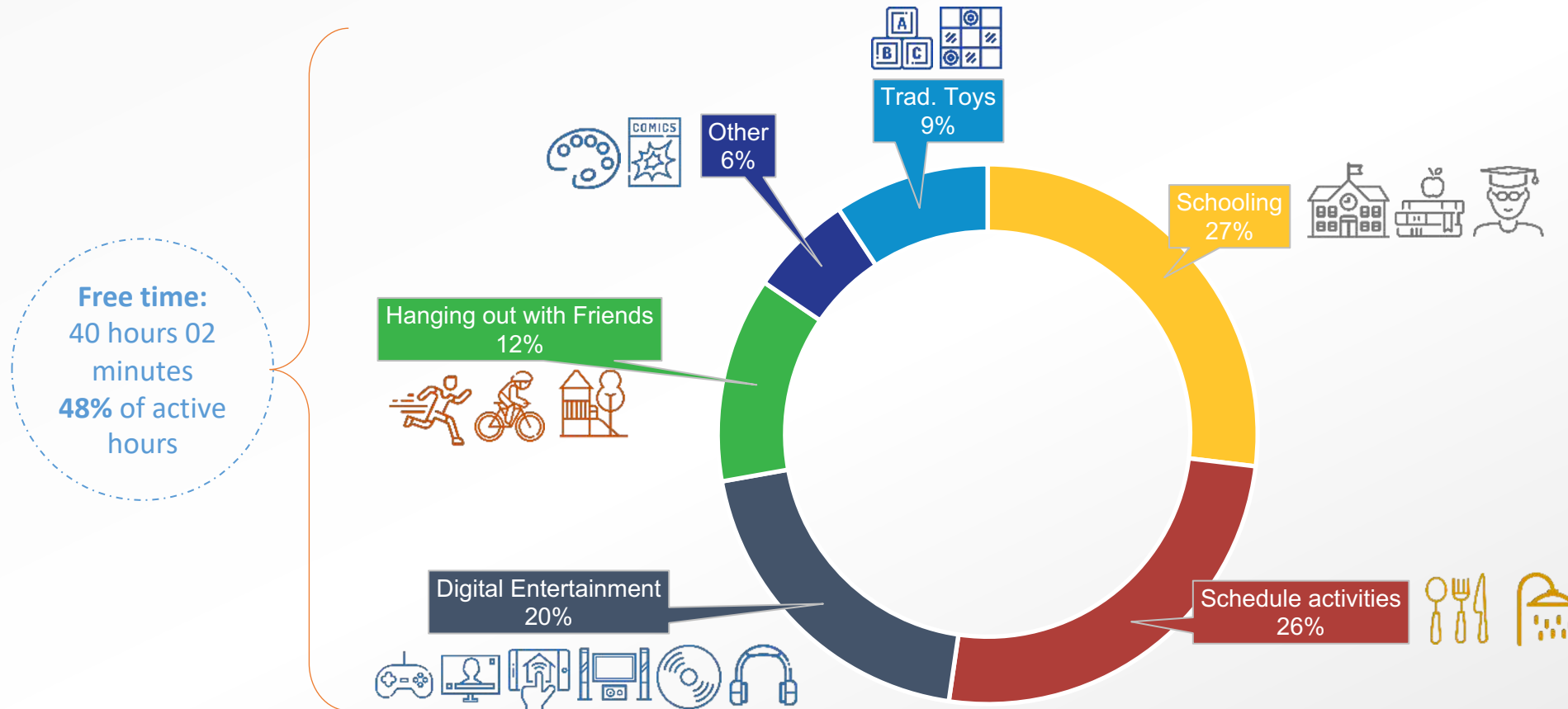
France - Equipment - Kids Ownership - Kids 4-11





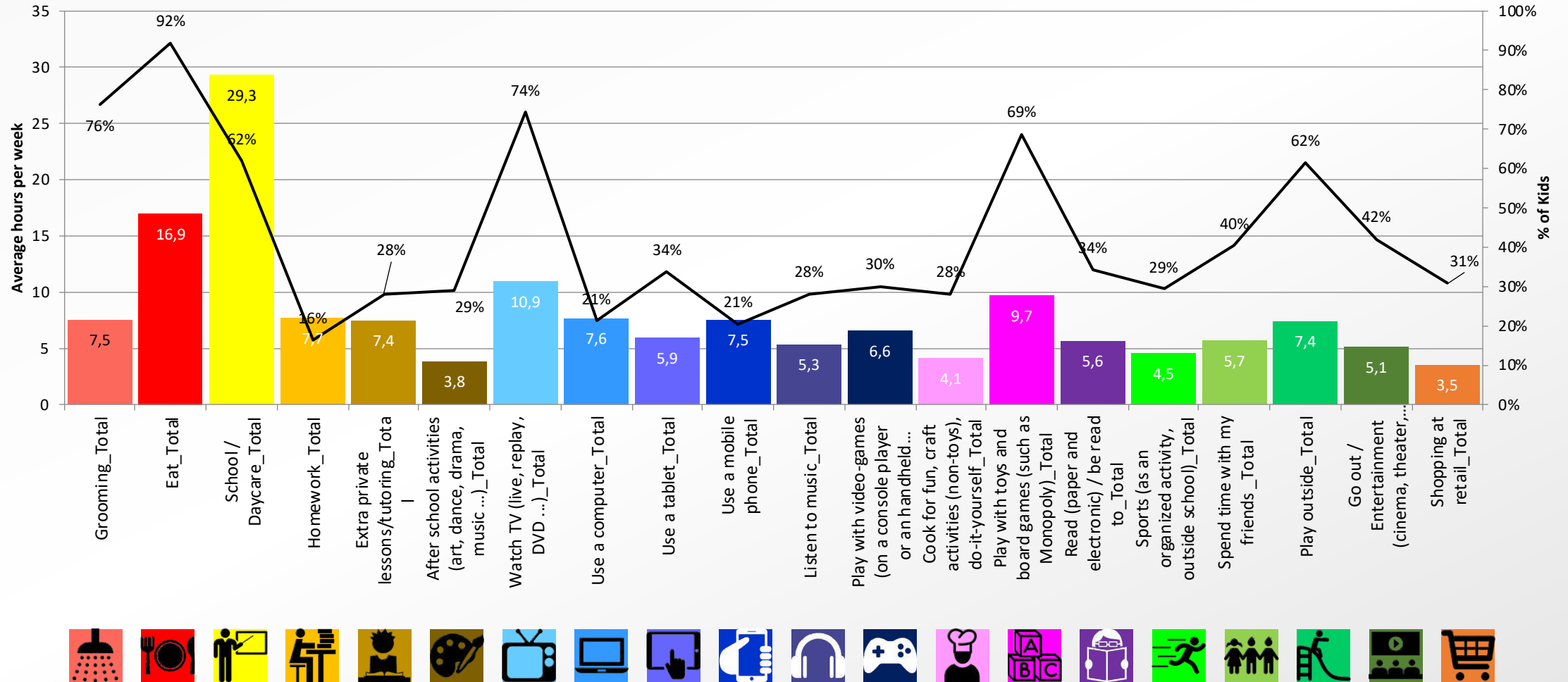
Kidz Time
Focus on Activities

Kids enjoy an average of 40 hours of free time per week which represents 48% of their active hours. The digital activities are the first free-time activities



Children spend most of their time at school. Then come activities such as eating and watching TV. Playing with toys remains a very strong activity in this demographics in France

France - Average weekly hours
Kids 4-11





The computer is used by kids mostly in the living room and alone.


Kids use the computer mostly to go on the Internet and watch movies/videos.

Focus on Tablet use

A young girl with long brown hair is looking down at a tablet device. She has a slight smile and is focused on the screen. The background is softly blurred, showing what appears to be a living room with a white sofa and some colorful items on a table.

Kids mainly use the tablet to play games or watch movies.

The use of tablets varies depending on gender. Watch movies/videos is the first activity practiced by girls whereas boys prefer to play games alone.



The top 3 activities on a mobile phone are:

Watching movies/videos,
chatting with friends
and listening to music

Multitasking

The activities the most practiced simultaneously are using a mobile, listening to music and watching TV

Attention to the activity is almost always shared with other activities ...

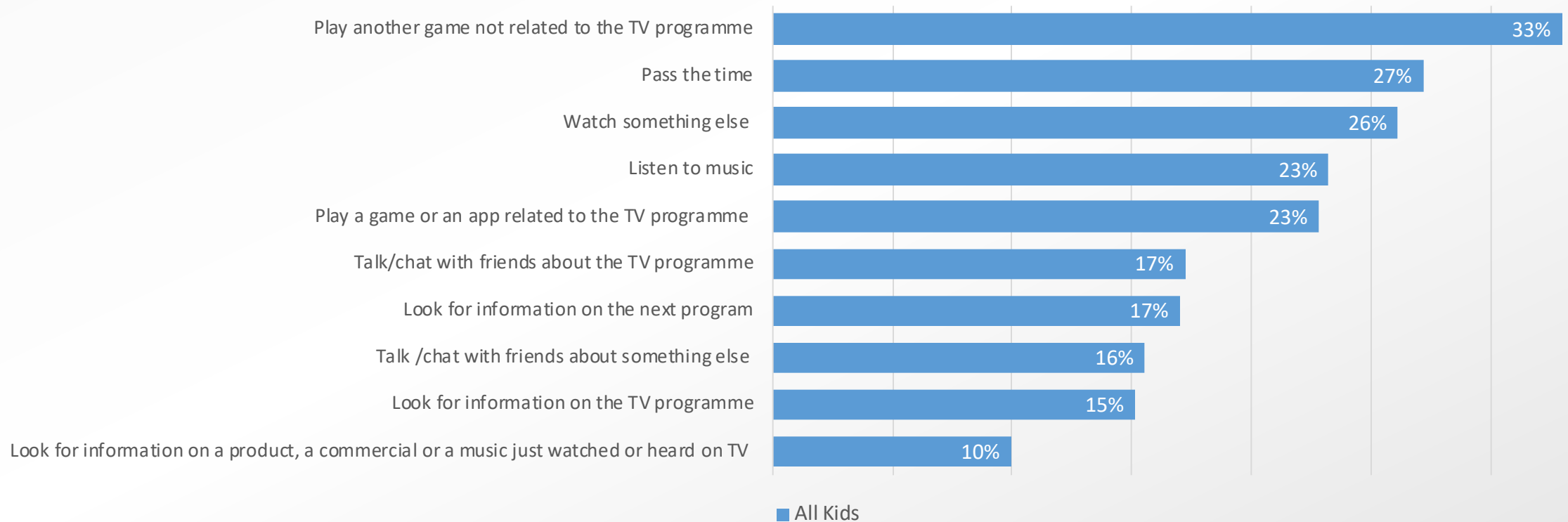


33% of kids who use a second screen while they are watching TV mostly do it to play a game not related to what they're watching on TV



Usually, when you are watching TV and using a computer/tablet/smartphone at the same time, what do you do?

France - Multitasking with an other screen while on TV Kids 4-11

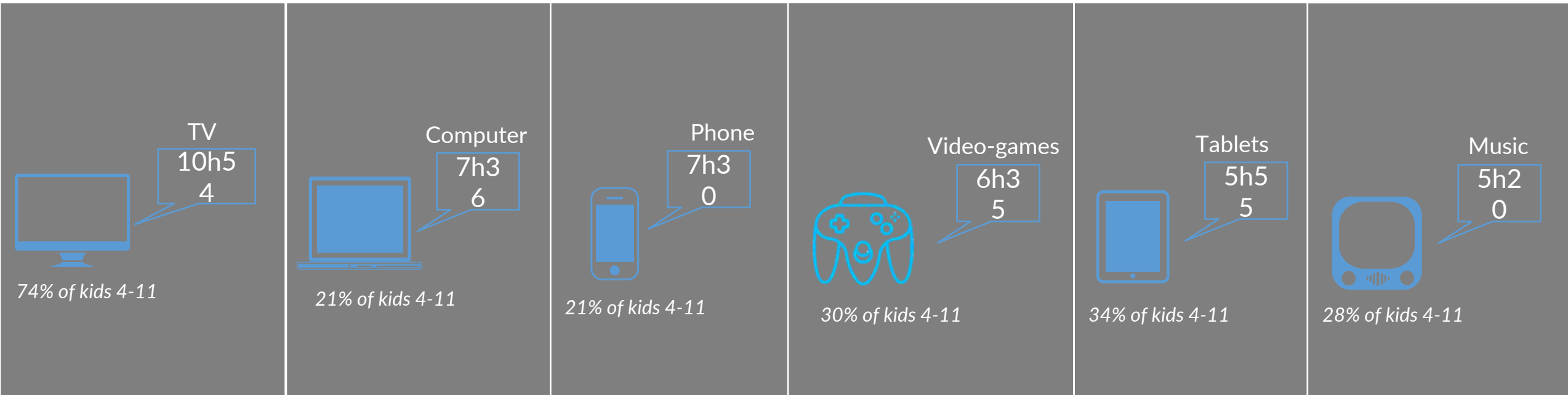




Concentration of digital usage

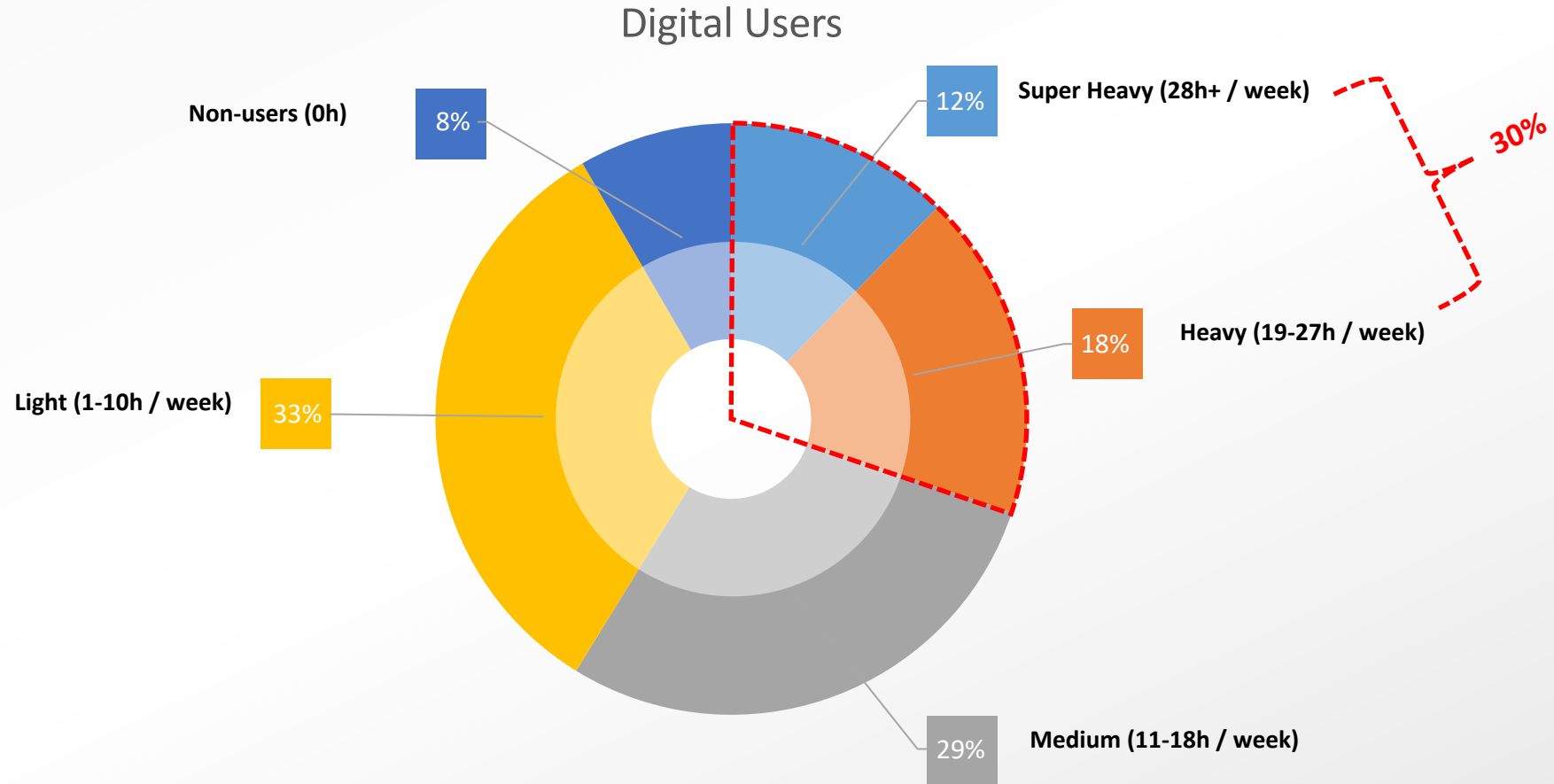
Spending Time On Screens

In 2019, time spent with screens represents 20% of kids' total time



*Kids are now part of a generation creating digital content about the brands.
These are no longer yours only anymore*

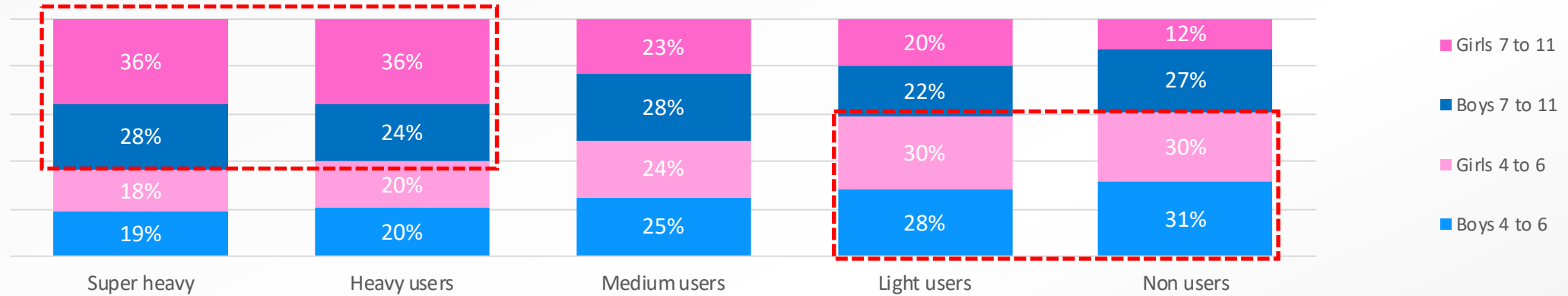
30% of the kids spend at least 2h45 minutes per day – this is the minimum - in front of a screen



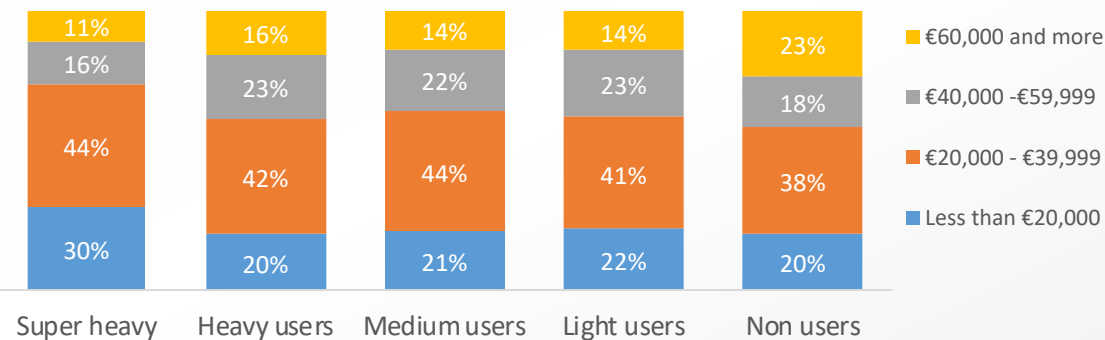
Who are the heavy/super-heavy users: older kids, especially girls, in middle-low income households. Household size is not a criterion to define this users' group



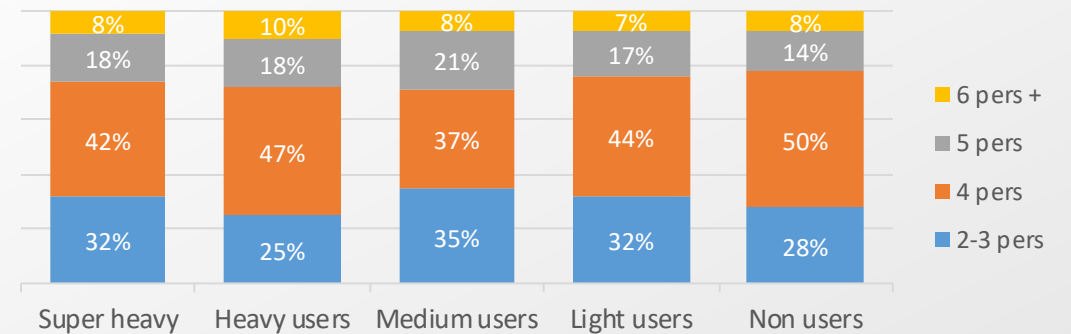
HML by age & gender



HML by household income



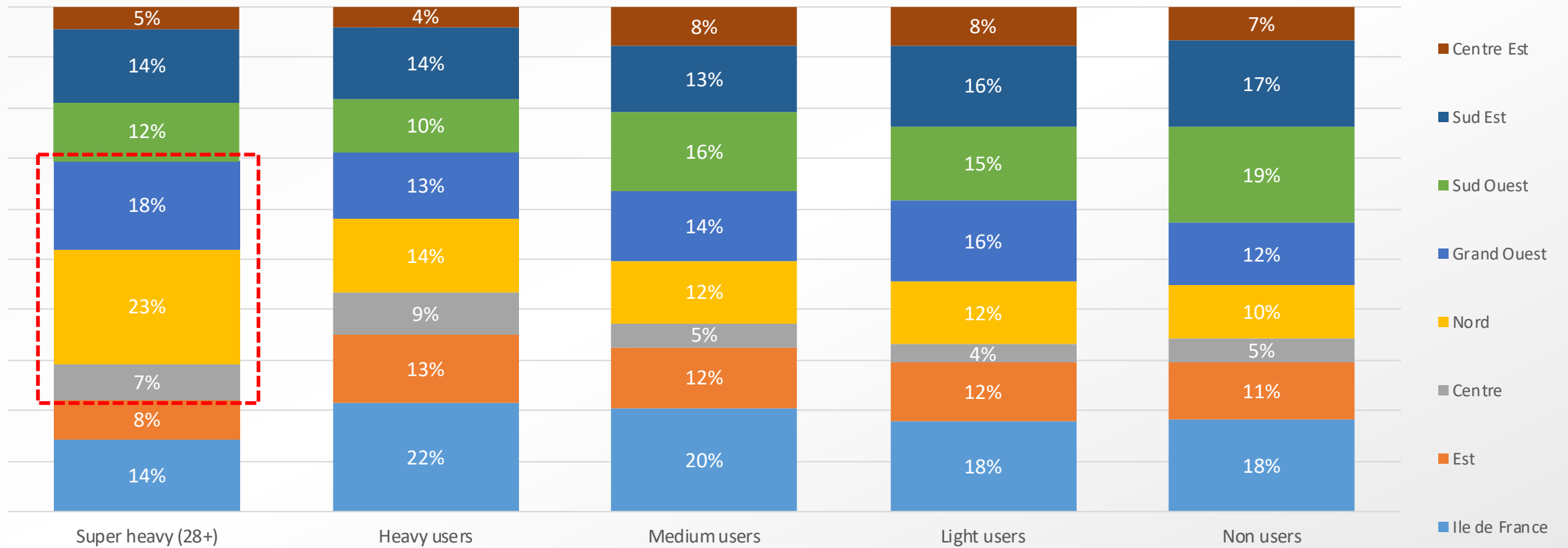
HML by household size



Ile de France is not the region for the super-heavy users.
The West-North arc is.



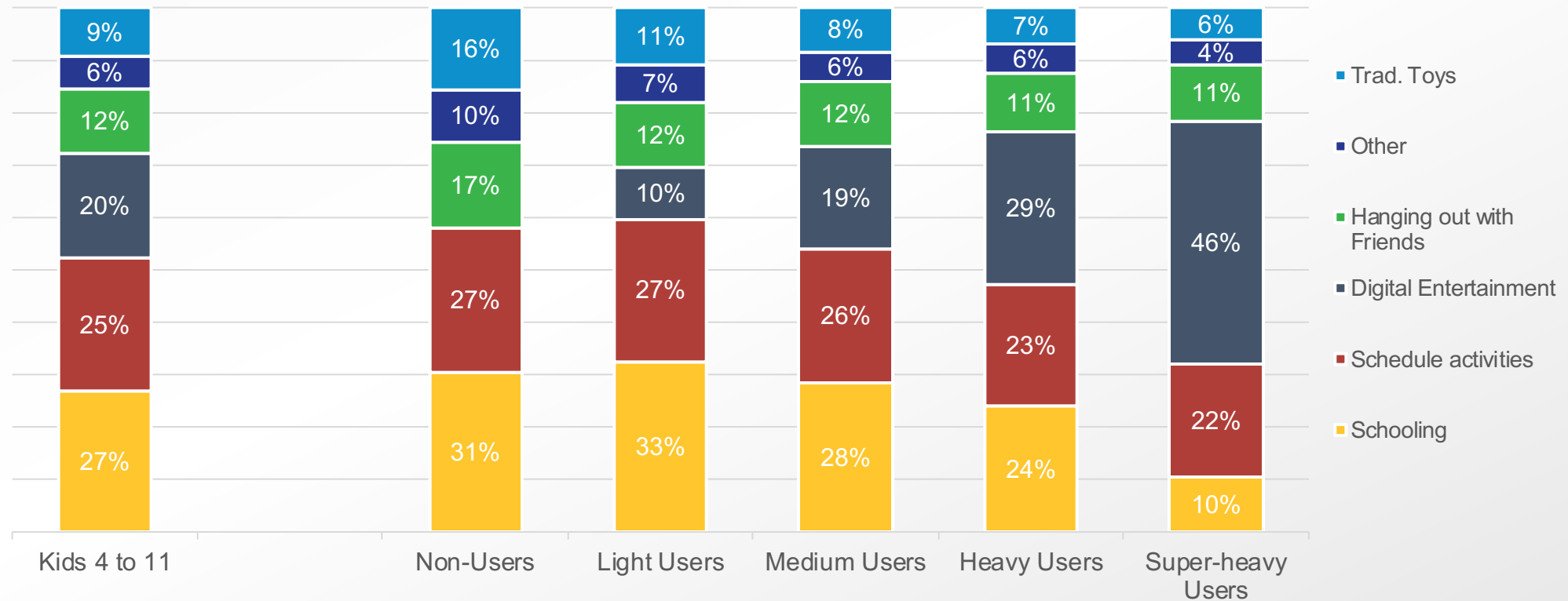
HML by region



Digital activities take over on schooling as well as the schedule activities: kids switch from their 'main job' to digital. No real cut on the socializing part though



France – Share of large activities by age
Kids 4-11



Focus on TV

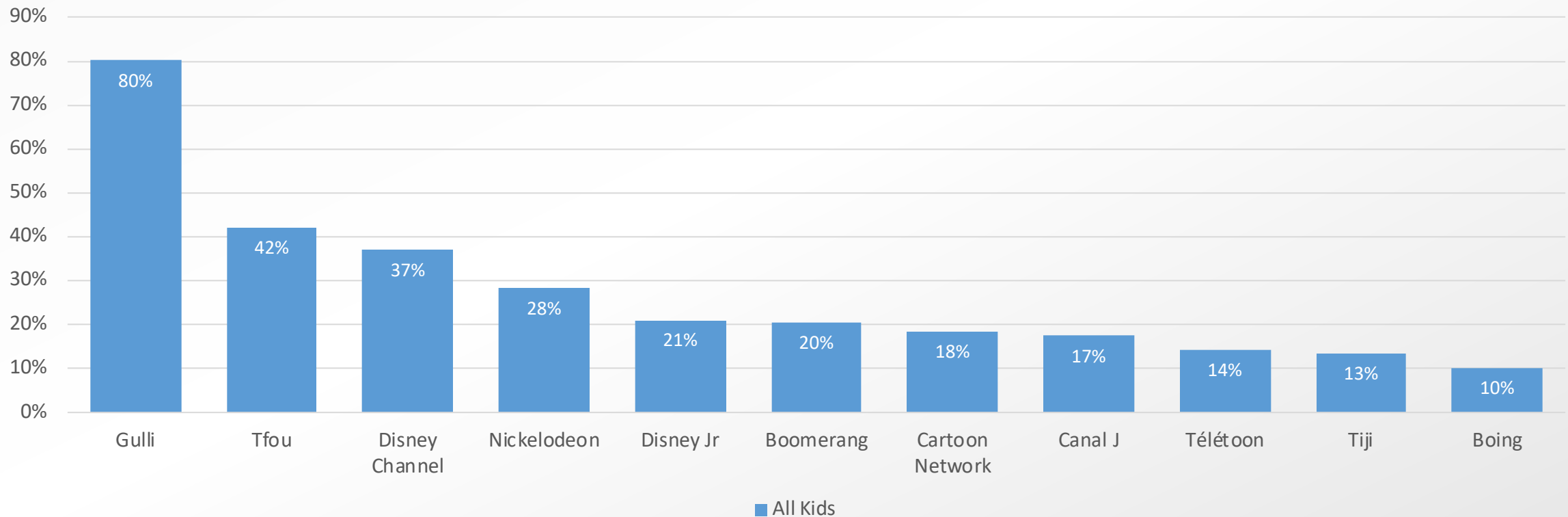


Gulli is the top TV channel for access, followed by Tfou! and Disney Channel



Which television channels did you watch in the past month?

France - TV Channels - Watched in the past month
Kids 4-11

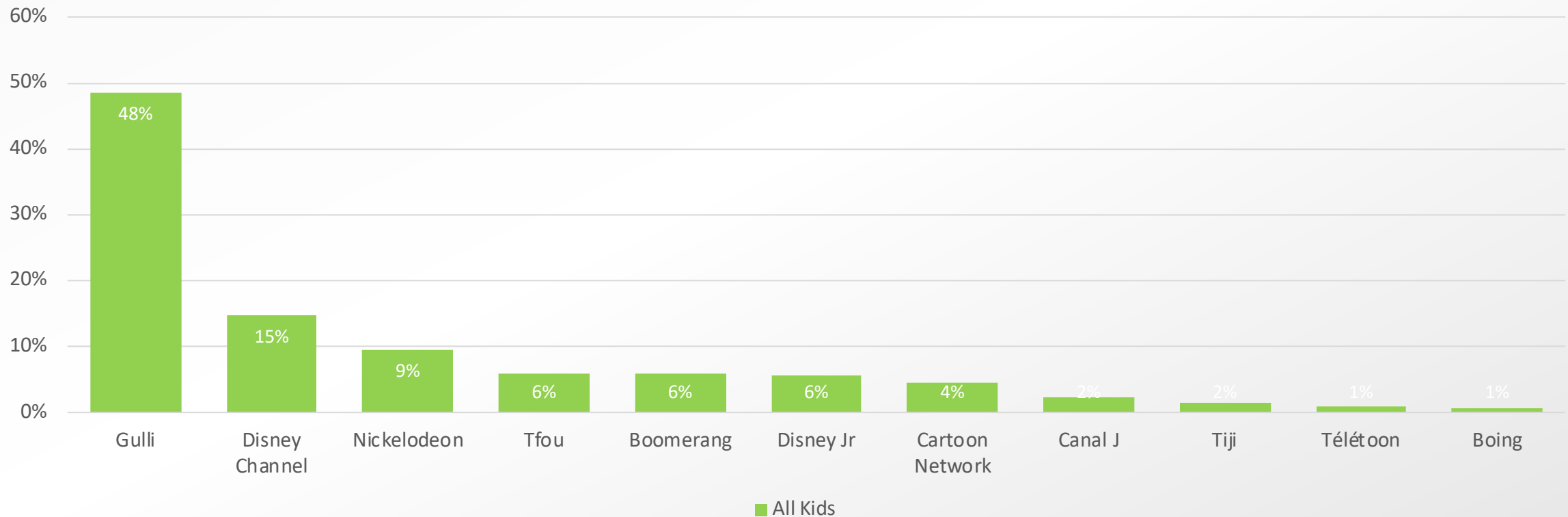


However, Gulli is by far the most favorite TV channel for the Kids 4-11 ... even strengthening as kids get older. Competition among the younger kids for the challenger spots is fierce



What is your favorite channel?

France – Favorite TV Channels
Kids 4-11

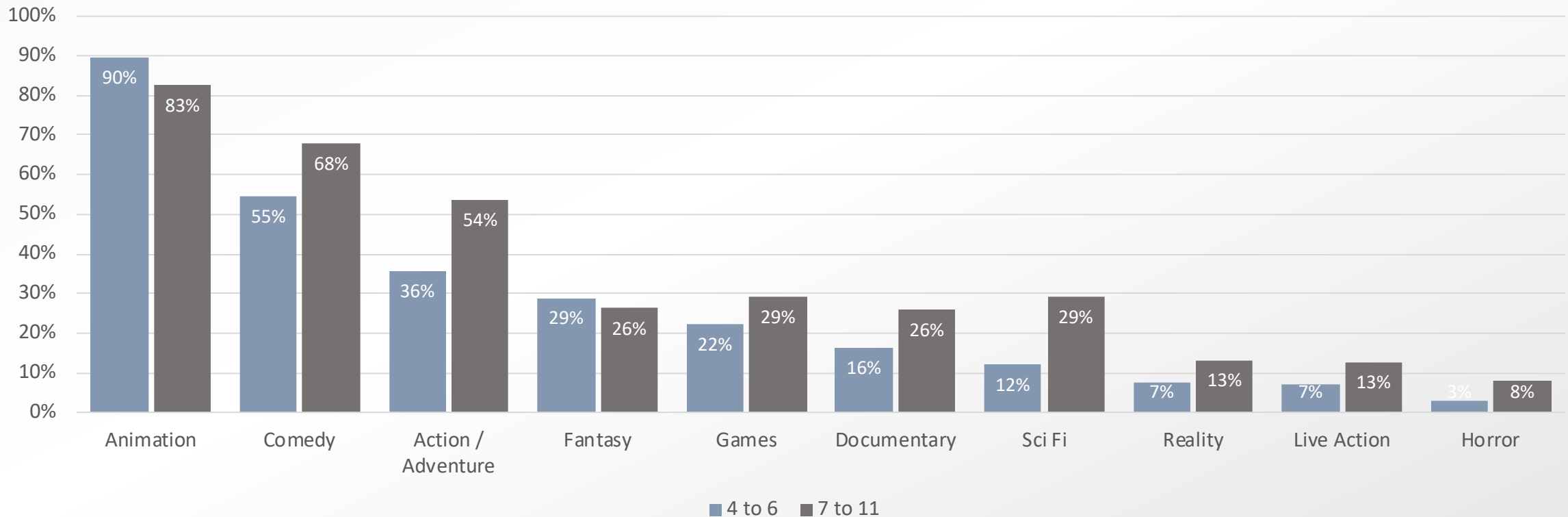


Pretty much all kids 4 to 11 watch animation shows. Slightly less than 2/3rd also watch Comedies. Action / Adventure comes in 45% of the cases. As kids get older, they open their horizon to a diversity of television types



What type of television do you usually watch?

France - Type of TV
Kids 4-11

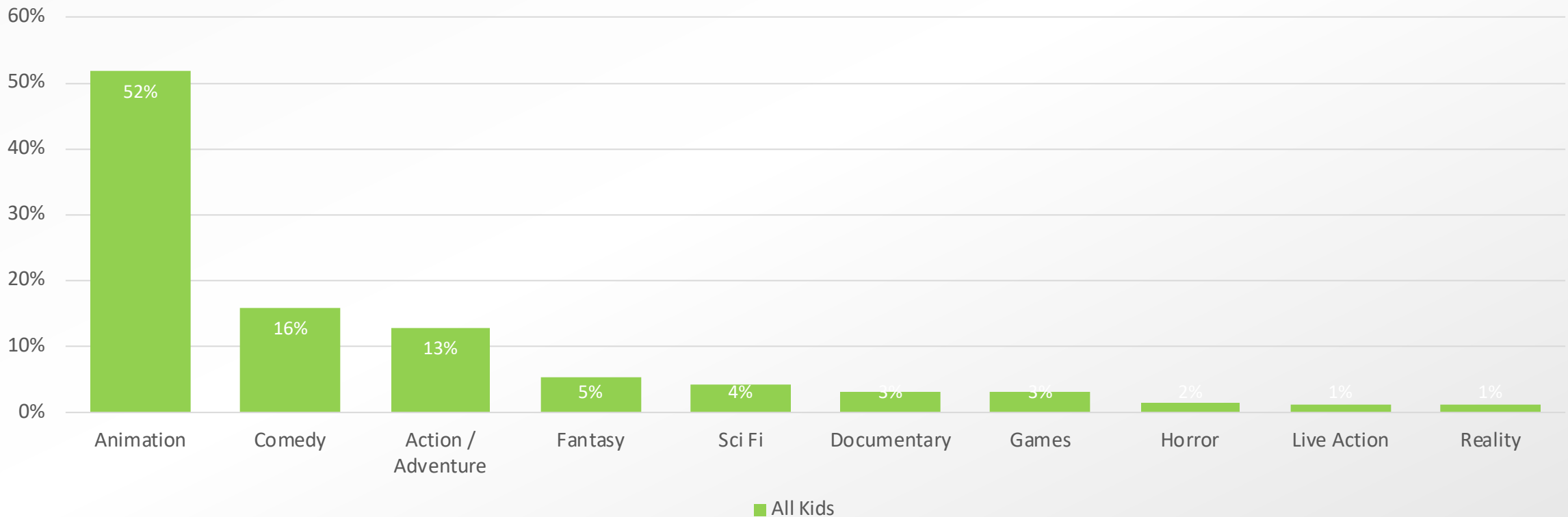


And their preferred television type remains Animation, for over half of the kids;
Even though preferences on other television types comes 'more' diverse as
they become older



What type of television is your favorite?

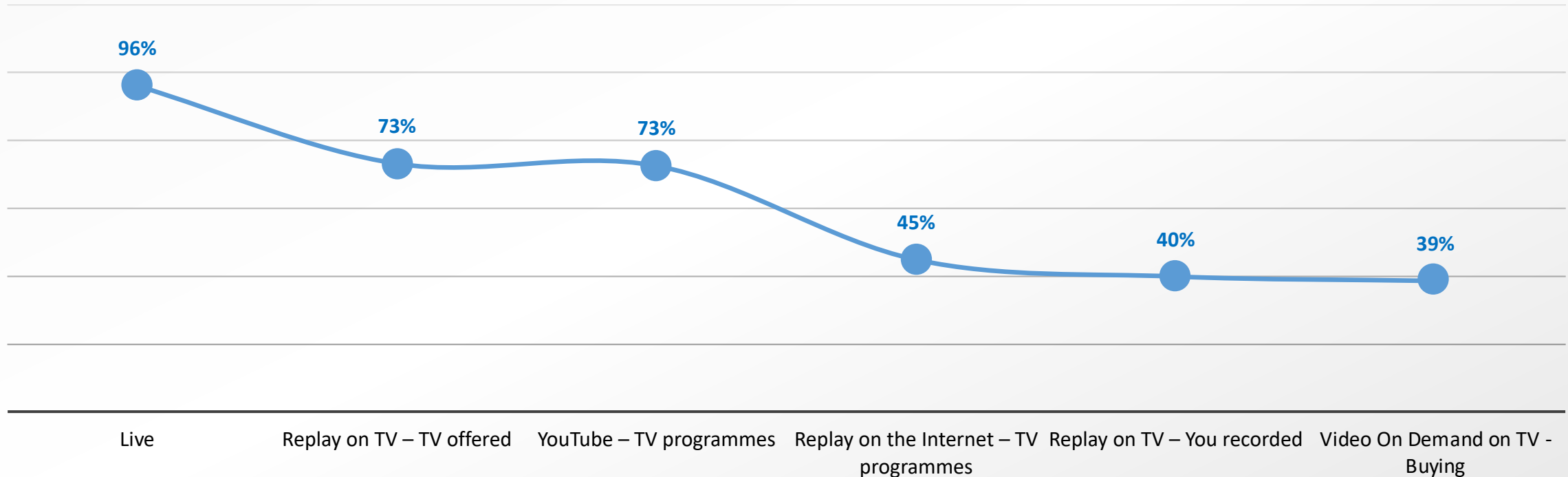
France – Favorite type of TV
Kids 4-11



Although most of the kids watch TV live, 4% do not. Screens consumption in any form is high among French kids, with a preference for 'on-the-spot-shows – as opposed to replay -

How do you usually watch television?

Ways to Watch Television, Occasionally to Always
France - Kids 4-11 – December 2019

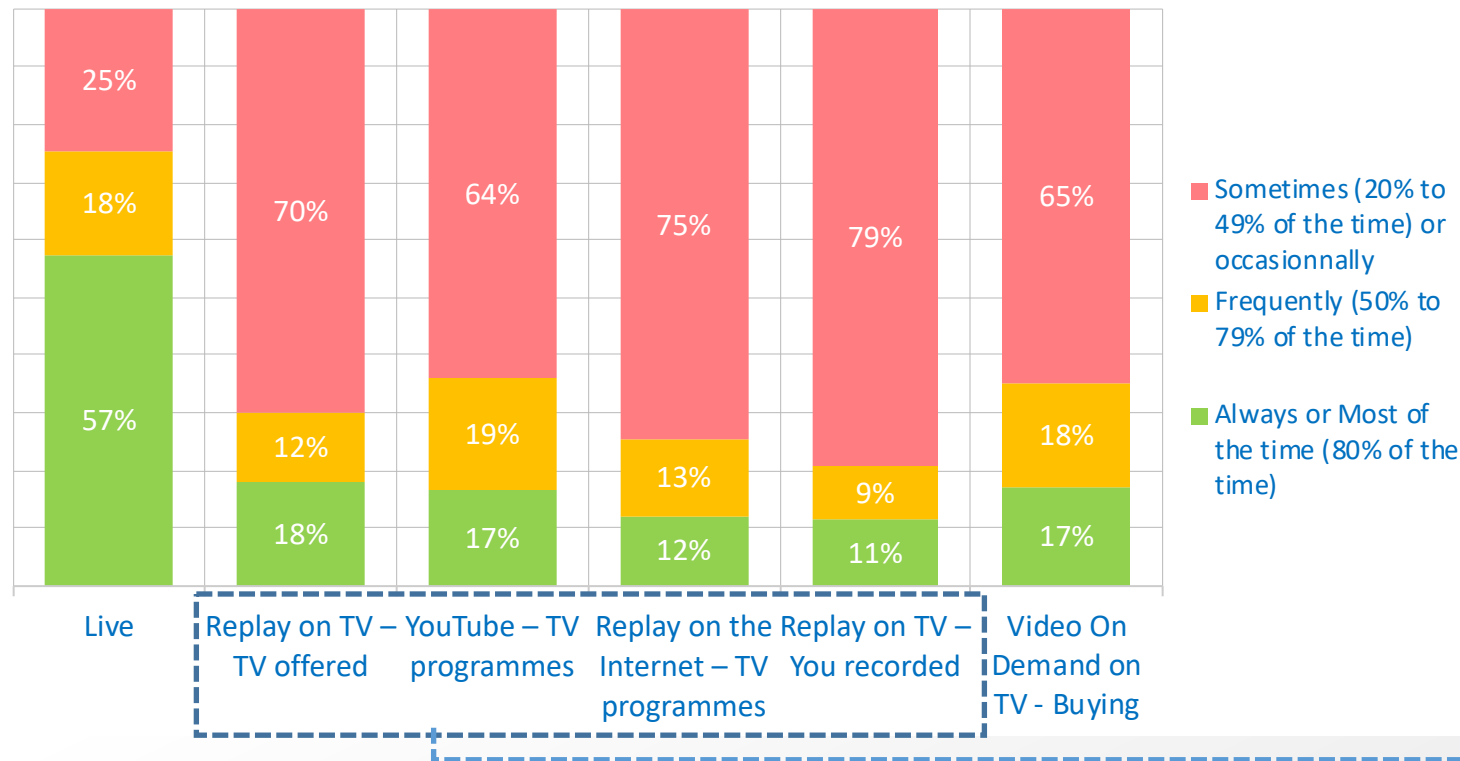


The Best way to watch TV? Live → Broadcast TV still engage kids, although YouTube is the direct contender. Replay happens within the week

How do you usually watch television?

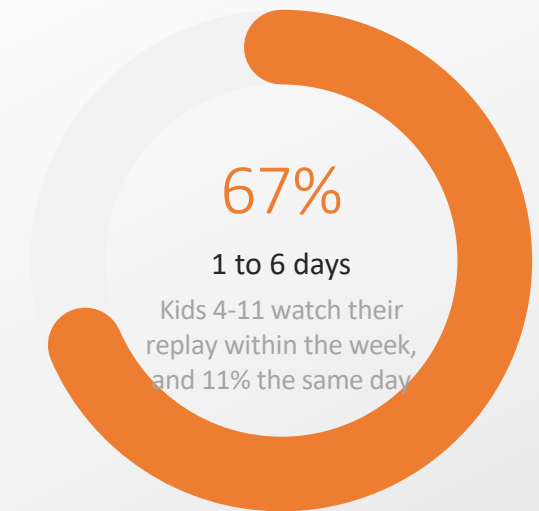
Ways to Watch Television

France - Kids 4-11 – December 2019



Delay to Watch Replay

France - Kids 4-11 – December 2019

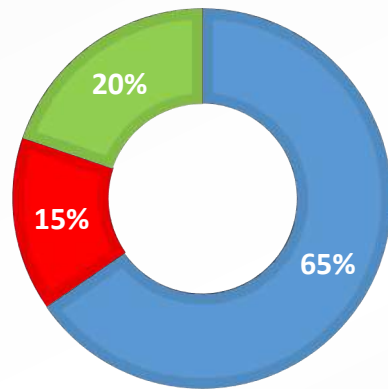


The quality of television improved, according to French kids; especially coming from the heavy users

How did TV kids' programmes change?

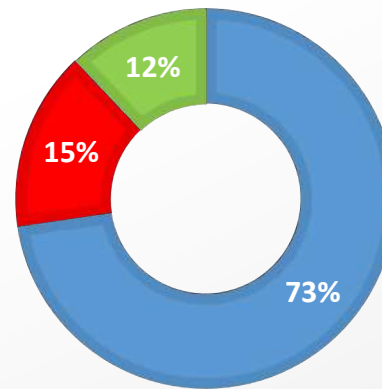
KIDS 4 TO 11

■ Did not change ■ Got worse ■ Improved



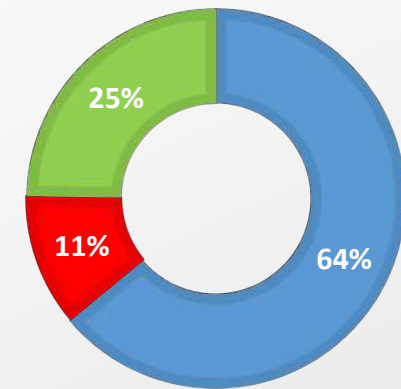
LIGHT USERS

■ Did not change ■ Got worse ■ Improved



HEAVY USERS

■ Did not change ■ Got worse ■ Improved

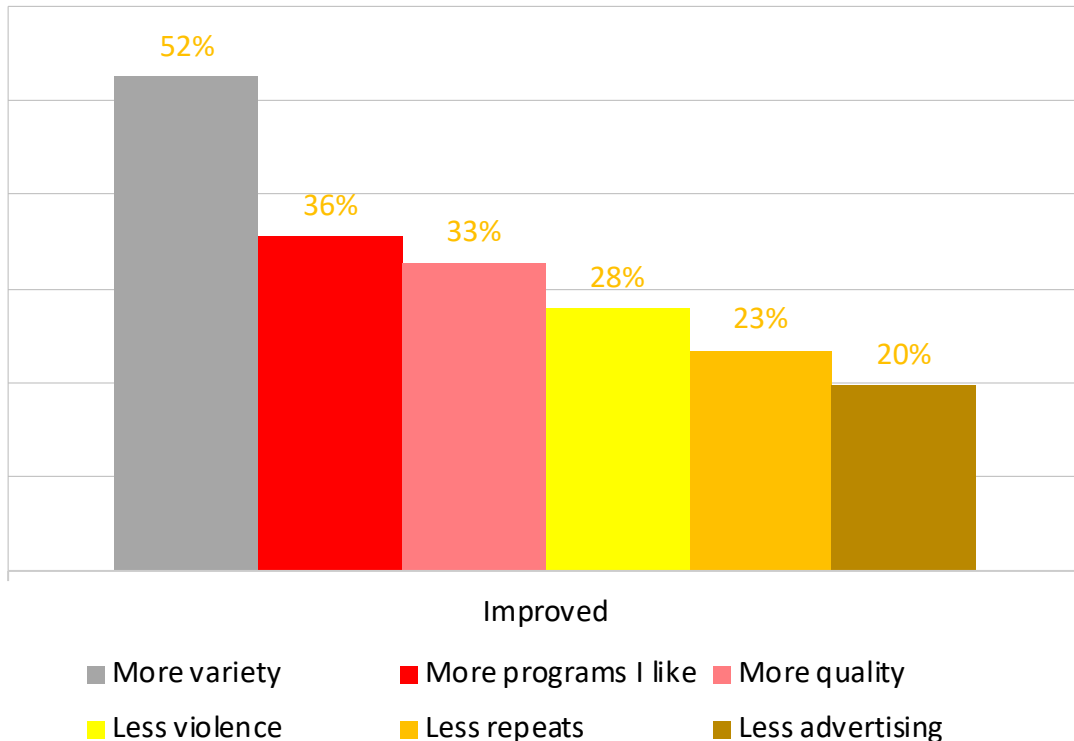


The feeling of more variety and right programs for them are the reasons for the improvement; however, those telling the programs deteriorated consider this is because of more advertising

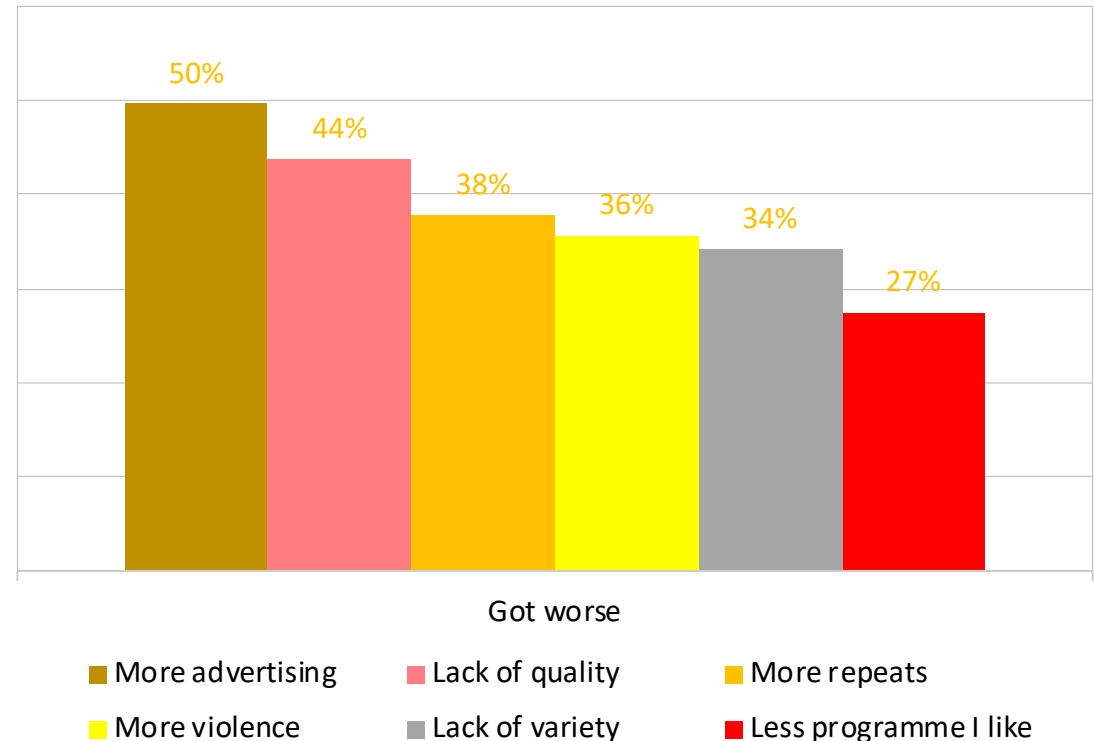


How did TV kids' programmes change?

Reasons Behind Improvements (20%)
France - Kids 4-11 – December 2019



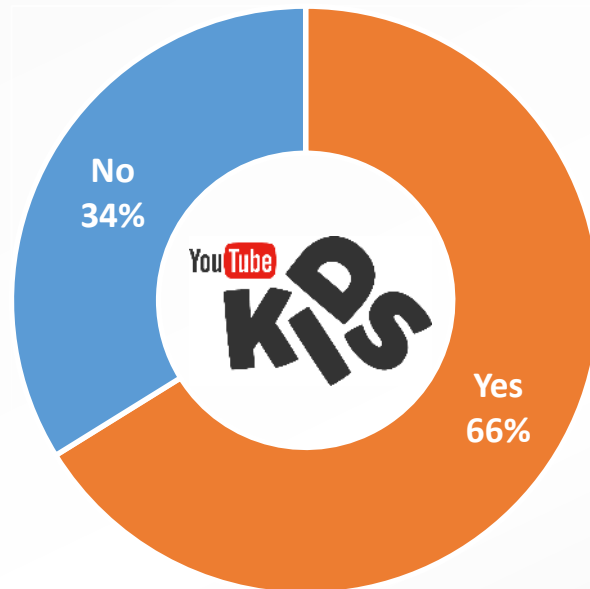
Reasons Behind Deterioration (15%)
France - Kids 4-11 – December 2019



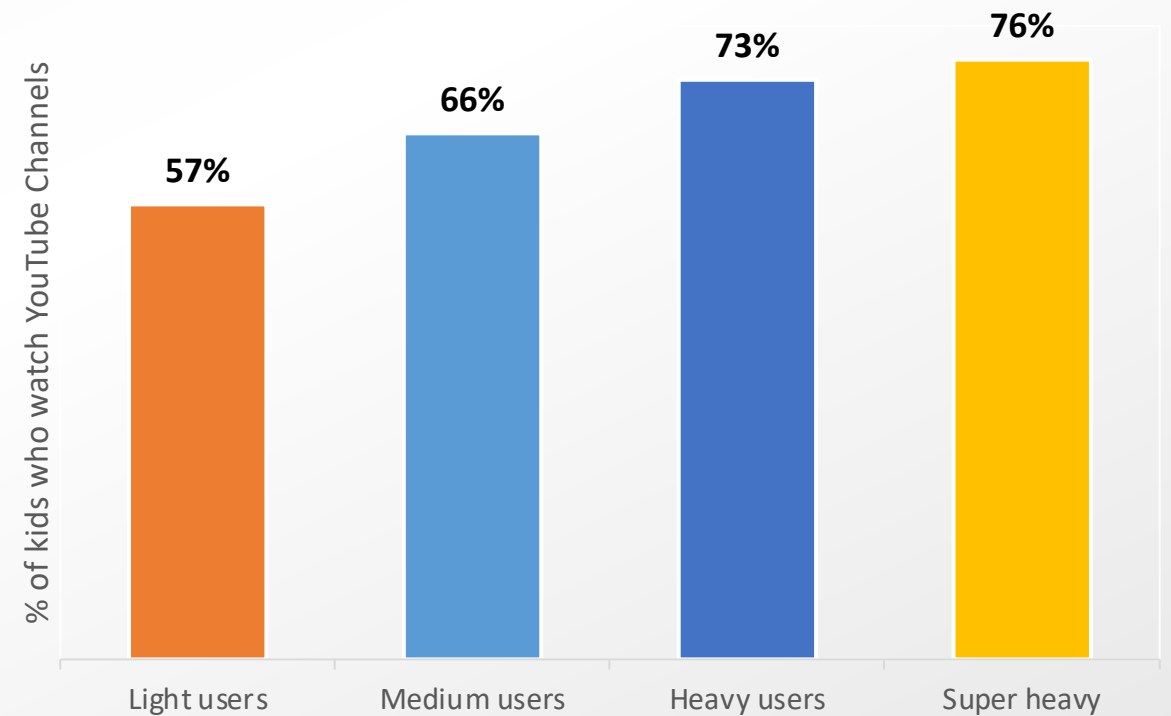
66% of Kids 4-11 years old watch YouTube channels and they represent 63% among kids 3-6 years old

Do you watch YouTube channels?

France – YouTube channels
Kids 4-11



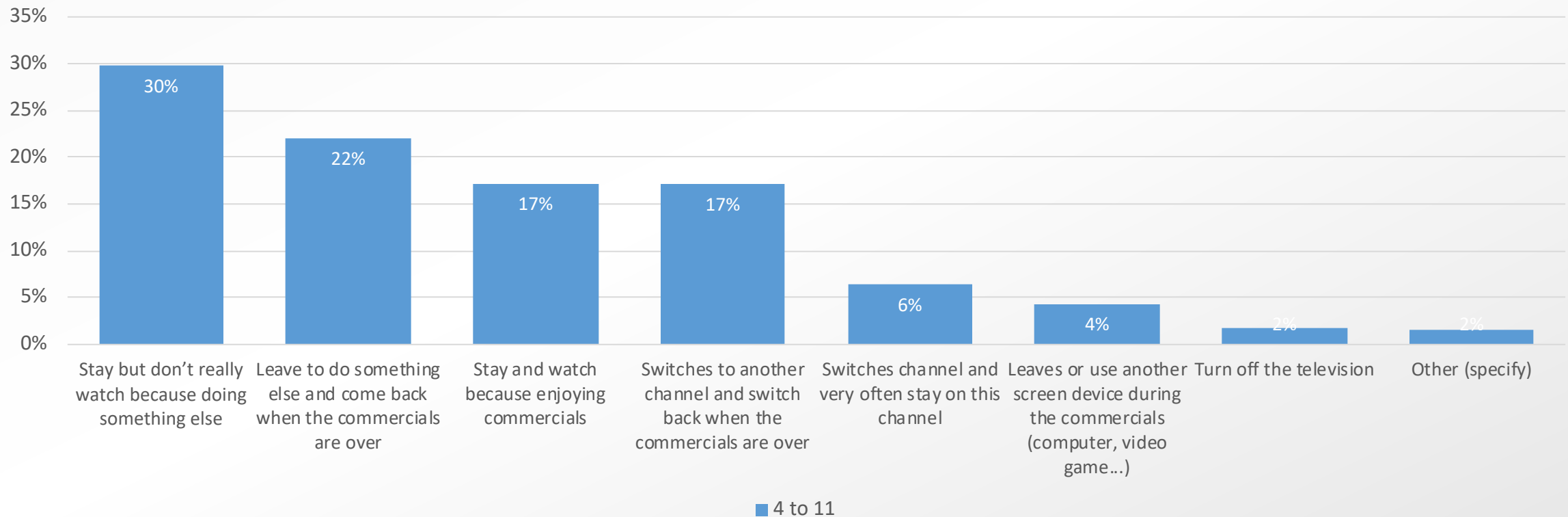
France – YouTube channels
Kids 4-11



A vast proportion of kids stay in front of the TV during commercials

What do you do during TV commercials?

France – During TV commercials Kids 4-11



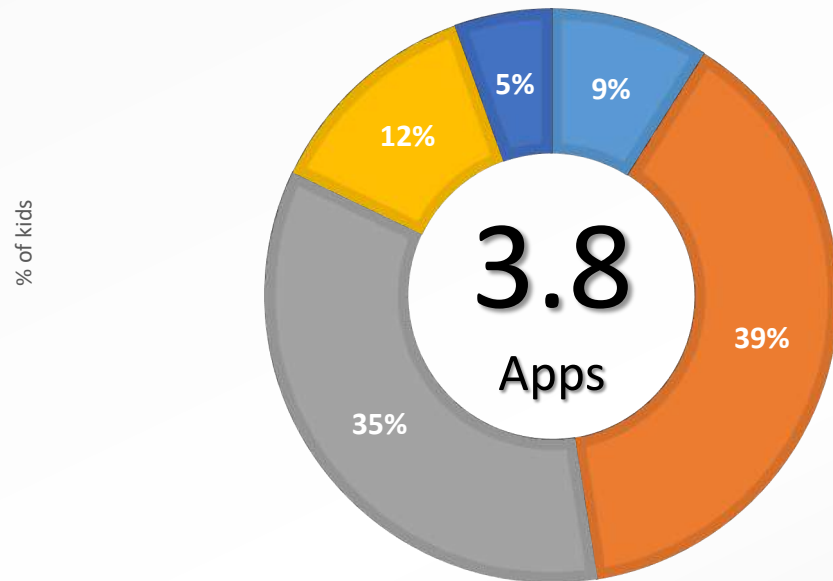


Focus on Apps

On a smartphone, an average 3.8 applications are used on a weekly basis, and 3.4 on a tablet

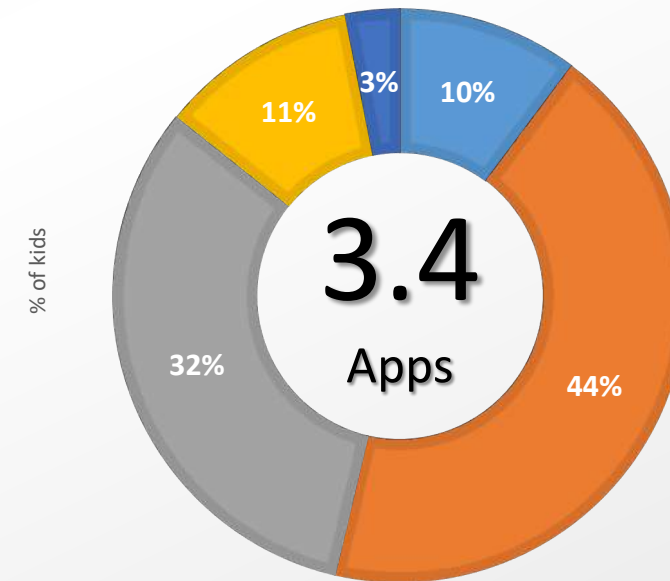
How many different Apps do you use in average per week?

France – Smartphones
Kids 4 to 11



■ None ■ 1 to 2 ■ 3 to 5 ■ 6 to 10 ■ Over 11

France – Tablets
Kids 4 to 11



■ None ■ 1 to 2 ■ 3 to 5 ■ 6 to 10 ■ Over 11

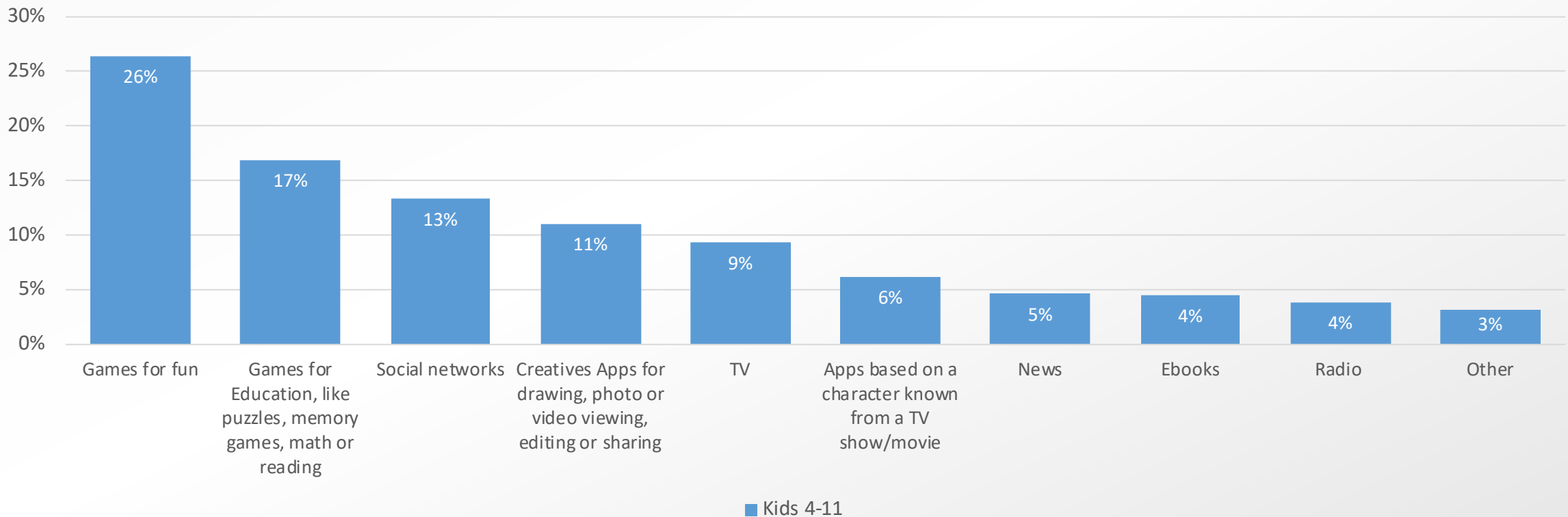
70% of kids use games for fun on mobile phones or tablets, social networks and creatives apps for drawing, photo or video viewing, editing or sharing.

Of course, the importance of social networks increases with age



What types of Apps do you currently use in mobile phone or tablet?

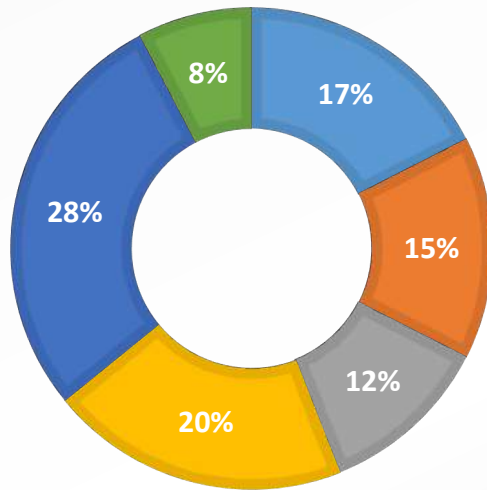
France – Types of Apps
Kids 4-11



Around 17% of Kids 4-11 years old using apps download an app at least every day. 28% download apps once in a while

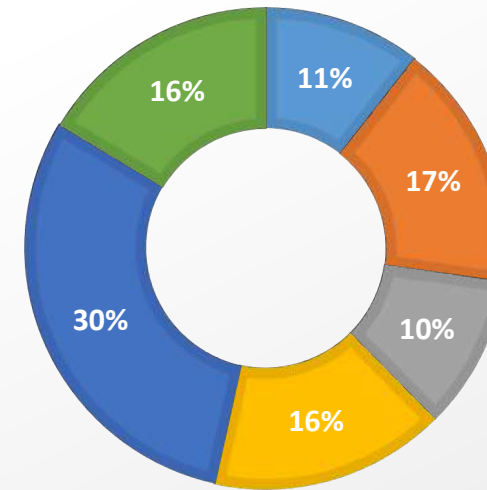
How frequently do you download Apps?

France – Smartphones
Kids 4 to 11



- Everyday
- At least a few every week
- One per week
- A few per month
- Once in a while
- Never download apps

France – Tablets
Kids 4 to 11



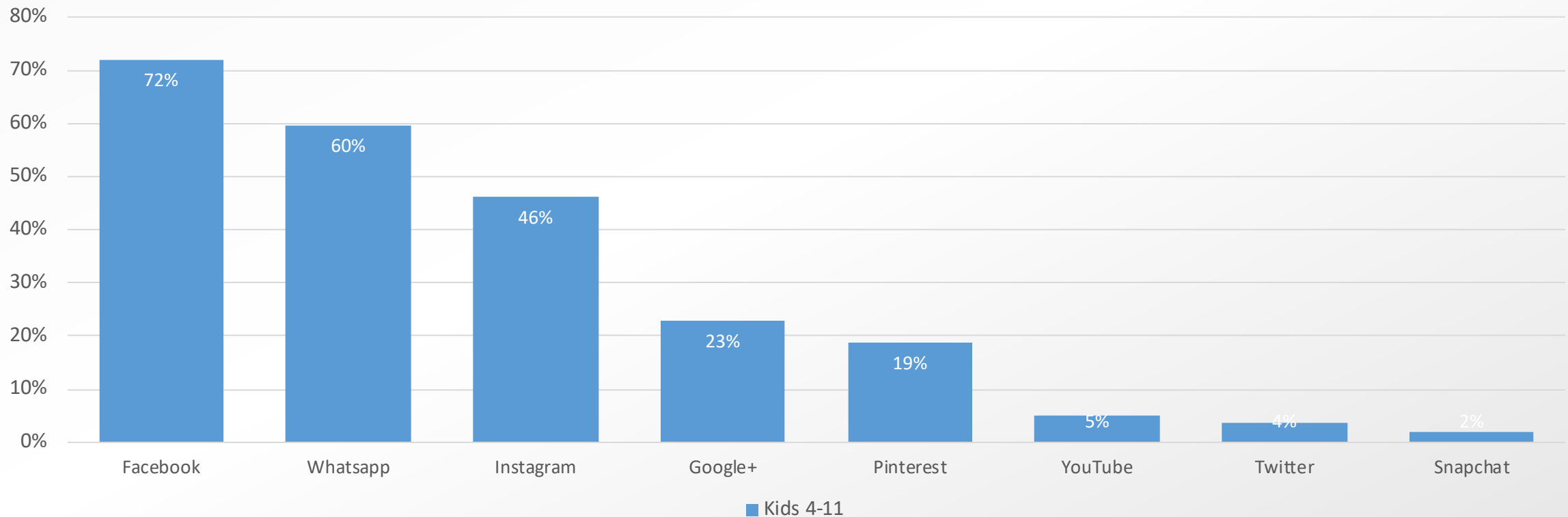
- Everyday
- At least a few every week
- One per week
- A few per month
- Once in a while
- Never download apps

72% of Kids 4-11 years old using apps have an account on Facebook – almost double the proportion 3 years ago! -, WhatsApp appears to be #2 with 60%: the 4 to 11 kids tend to use their siblings Apps



Which of the following social networks have your child/you an account on?

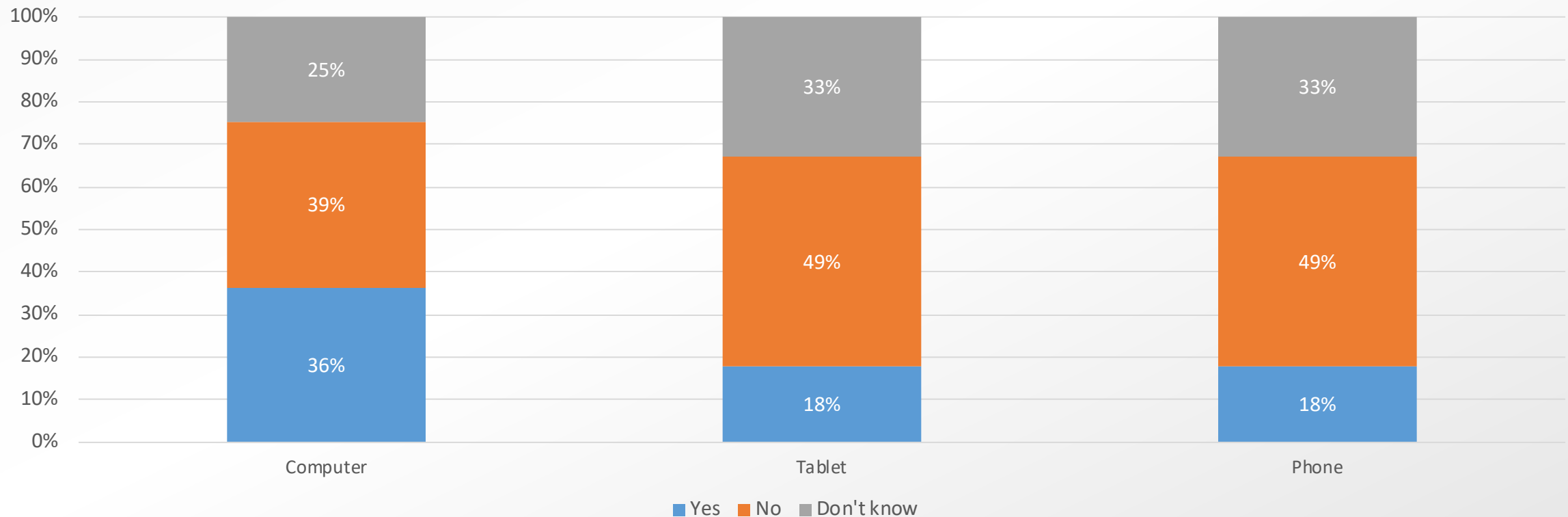
France – Kids having an account on these social networks
Kids 4-11



Ad Blockers are mostly used on the computer. 48% of kids are using it on computer

Does the computer/phone/tablet your child uses/ you use have Ad blockers?

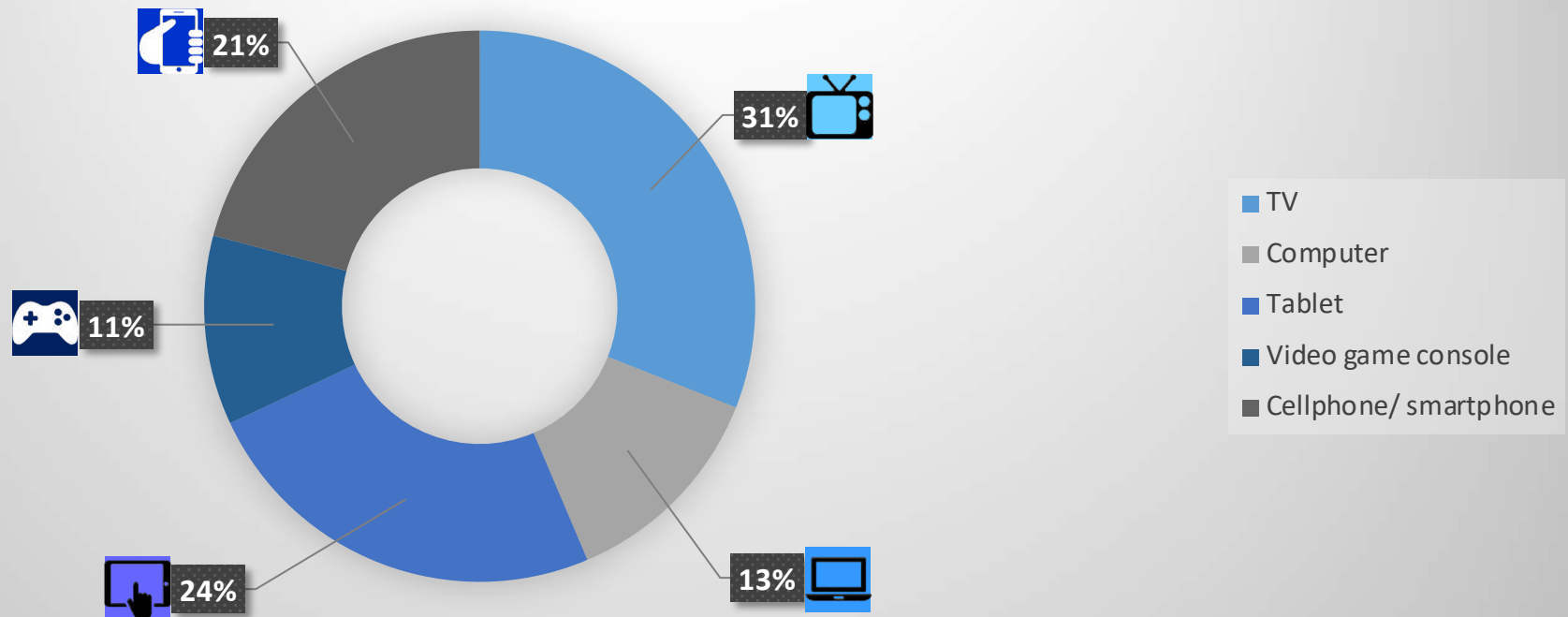
France – Kids using Ad Blockers Kids 4-11



Kids prefer TV (28%), but we observe a strong decrease for TV and tablets as children grow up for the benefit of smartphones and computers

Let's talk about screens. If tomorrow you had only one screen, or device connected to a screen, to spend time on, which one would you choose?

France – Smartphones Kids 4 to 11



Before You Go



Kid consumers continuously shift more towards experiences rather than only product consumption

New technologies come to a point of allowing more immersive experiences

Social media continue developing their penetration among kid consumers

Convenience and ease to immediate access drive higher consumption of Digital Entertainment



Take-away 01

Take-away 02

Take-away 03

Take-away 04

THANKS

FOR YOUR ATTENTION

Want to know more?



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