

Emotional Scheduling: Do Children Know What They Want and How to Find it?

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for TRT International Children's Media Conference



Dubit is a global
kids and family agency
with a 70-person
strategy, research and
digital team...



...an onsite PlayLab,
and Dubit Trends,
a global tracker
reaching
8000 children and
families.

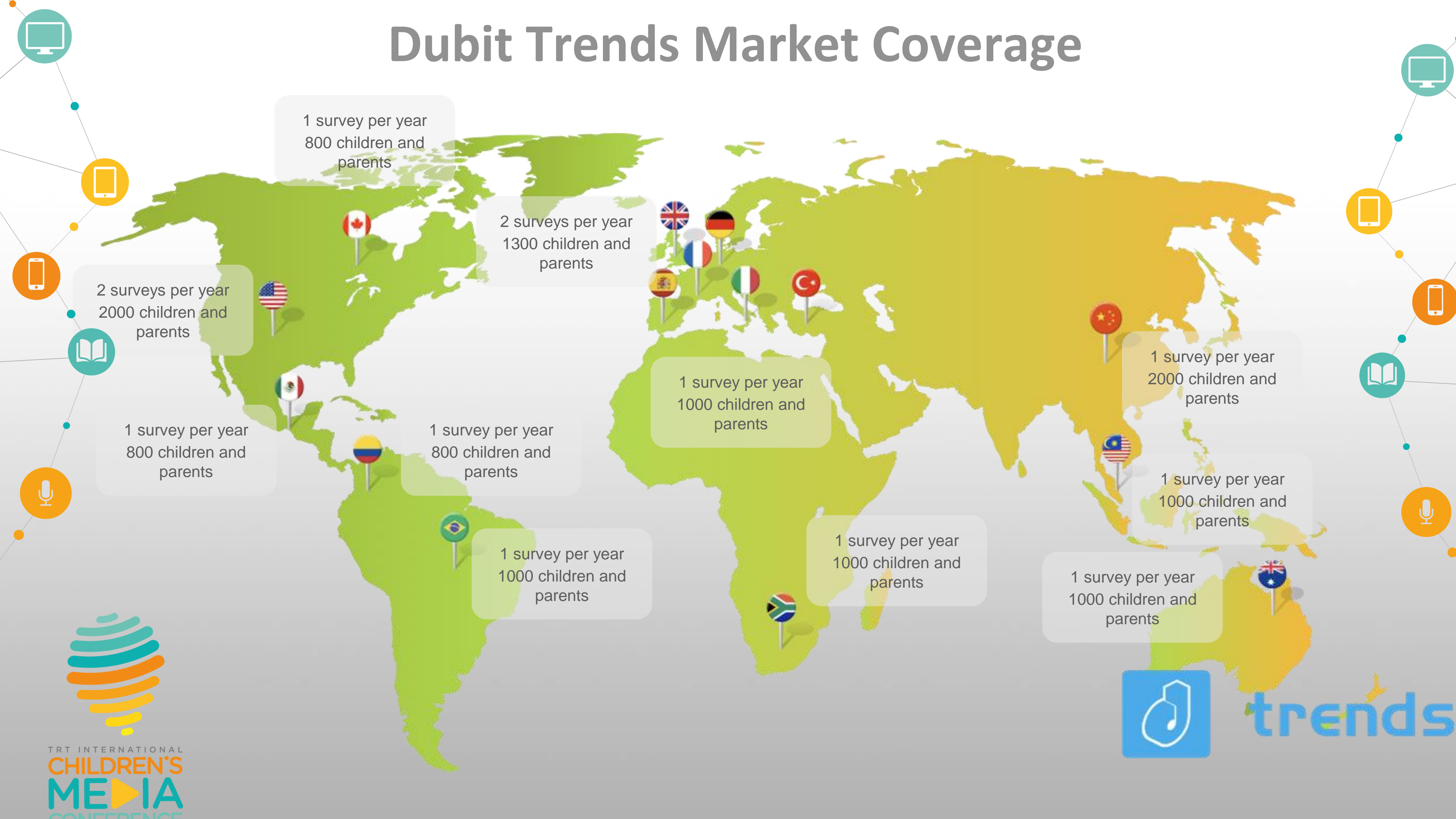


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Dubit Trends Market Coverage



The Paradox of Choice





More choice : fewer
purchases
More chaise : less
satisfaction







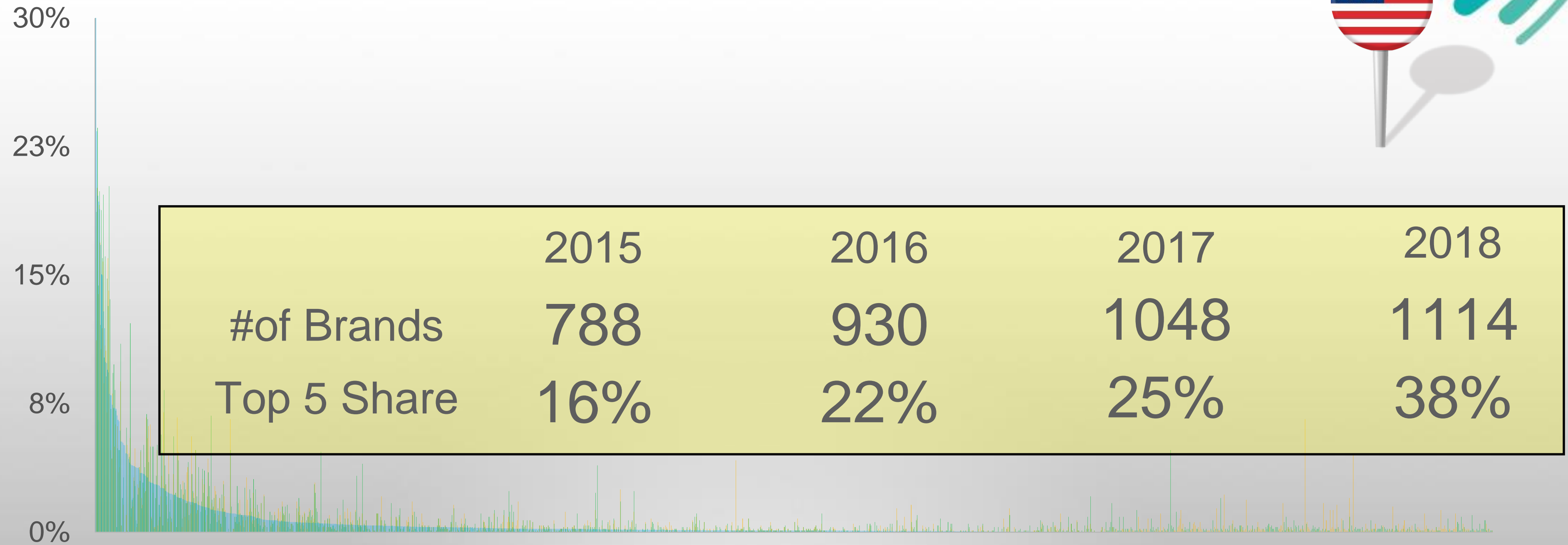
The U2 Dilemma: I Still Haven't Found...

> 60% of kids
worldwide...
...struggle to find
the content they
want.

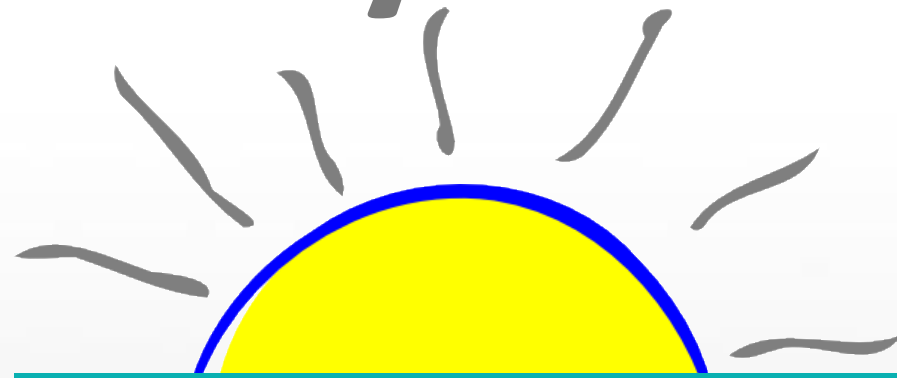


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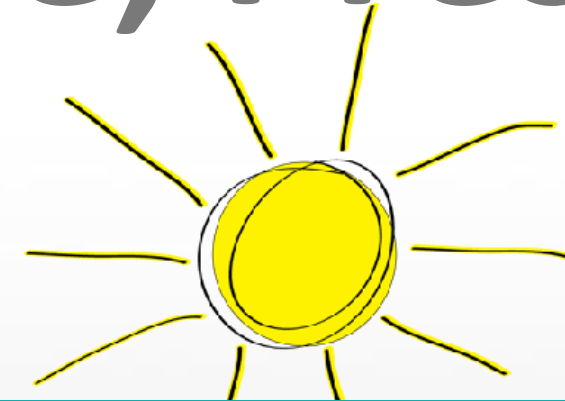
...What I'm Looking For



A Day in the Life, Preschoolers



Morning



Afternoon



Evening

Distraction/
Quiet Time



Learning/
Creativity

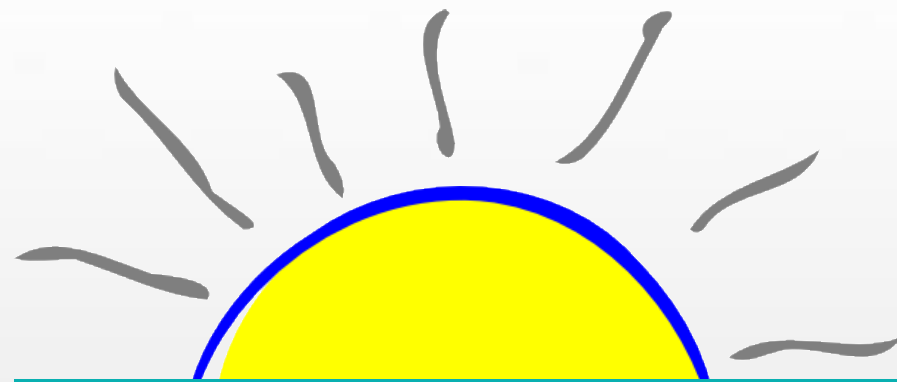


Sit-back/Play

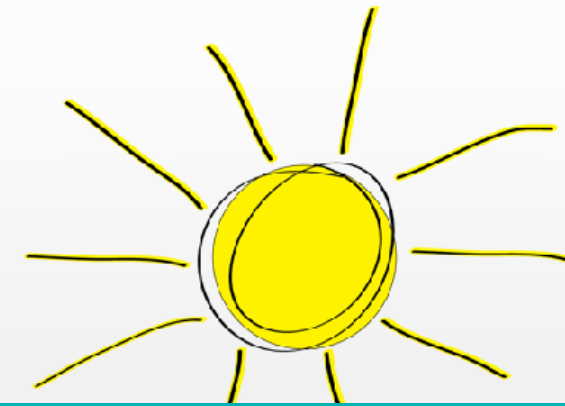


0-5

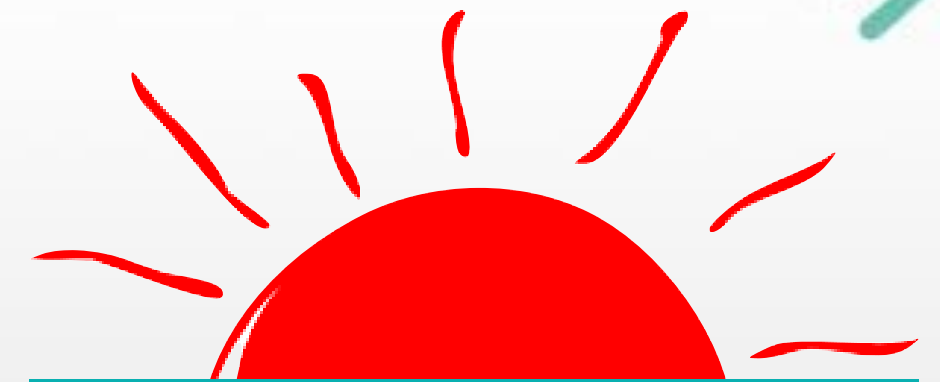
A Day In the Life, Older Kids



Morning



Afternoon



Evening

Snacking/
School



Social/
Hobbies



“Chill-out”/
Long-form

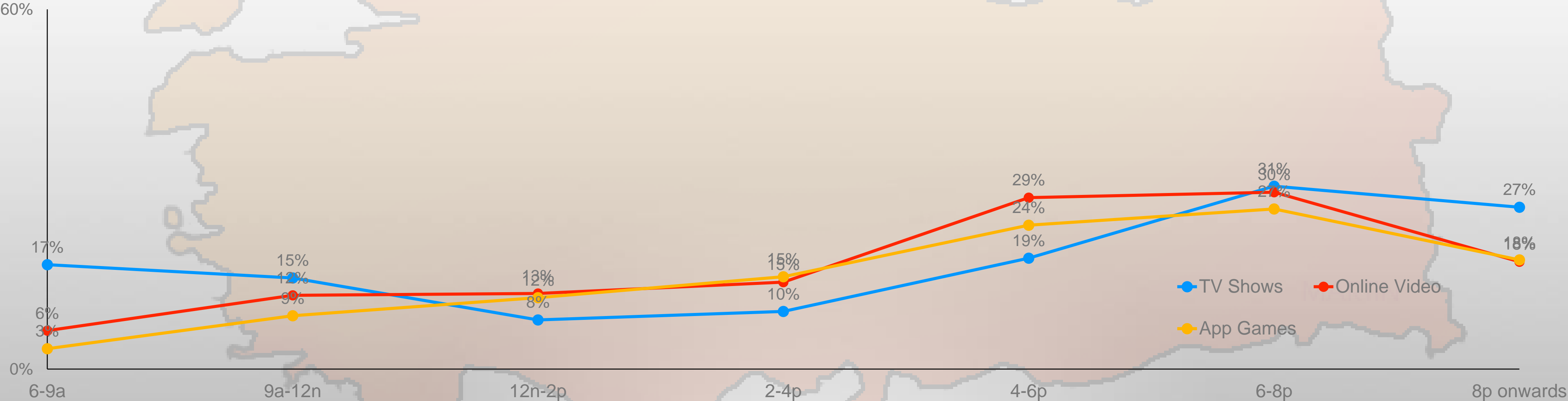


6-10

Media Day - Weekdays



Watching TV shows/series



Prime Times for TV, Video, Games



	Weekdays	Weekends
Watch TV Shows	6 - 8 pm (31%)	9 am -12 noon (32%)
Watching Online Video	6 - 8 pm (19%)	9 am - 12 noon (20%)
Playing App Games	6 - 8 pm (18%)	2 - 4 pm (19%)



Key Factors

Devices

Television has the highest household penetration, although many households rely on one set
Older children seldom control the content (little ones or adults get first choice)
Smart TVs are becoming more common, further disrupting linear viewing (YouTube on the big screen)
10 and under more likely have a tablet; 11 and up a smartphone (similar to other emerging markets)

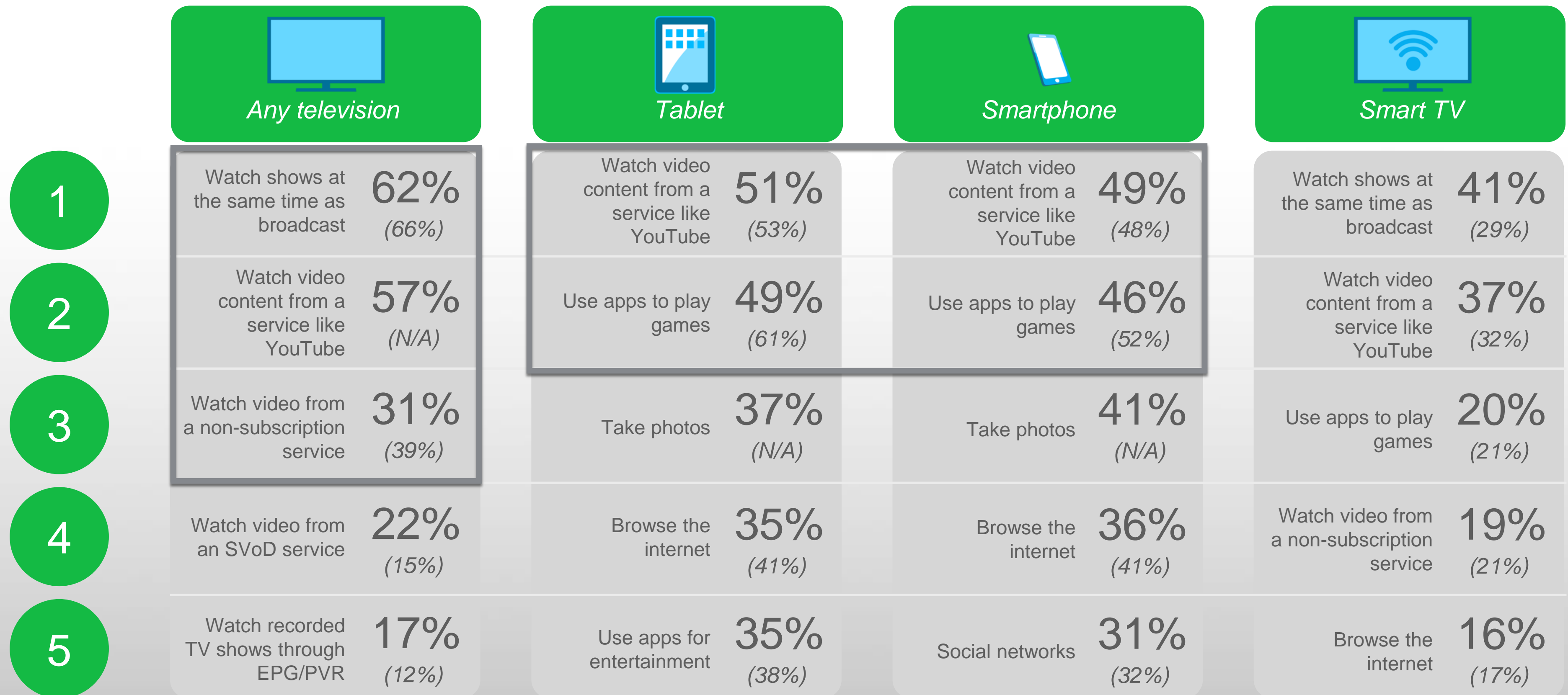
Activities

Time spent watching a television has declined; using a tablet is as much a daily habit as watching a TV
Linear TV still dominates, accounting for more than an hour per week compared to streaming services
Time spent with a tablet is up, and time on smartphones has doubled
The top mobile activity is watching video; game playing is second (reverse of US, where games are #1)
Taking photos and browsing the internet are the next most common activities



Top 5 Activities on Screens

Watching broadcast TV is the top activity on a television, whilst playing app games ranks number one on connected mobile screens



Source: Dubit Trends. AQ1.2. Now we'd like you to tell us the different things you do [text-sub: your child does] when using...?
(Base: TR Wave 6 998 Wave 8 1043)

(XX%) = Previous year (Wave 6 - October 2017)

Top Television Brands

TV shows



14%



11%



7%



5%



5%



5%



4%



3%



2%



2%

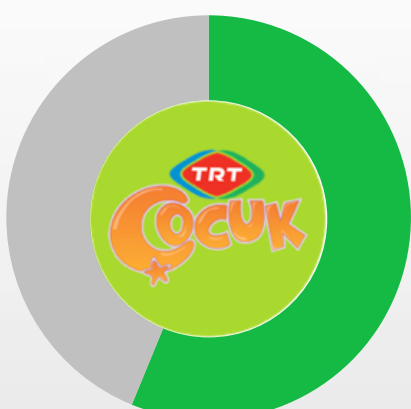
Source: Dubit Trends. BQ1. Name three toys ;BQ2. Name three game apps; BQ12c. Name three video apps; BQ4. Name three messaging apps; BQ7. Name three TV shows that you like the most right now
(Base: TR Wave 81043)

Top Channel Brands

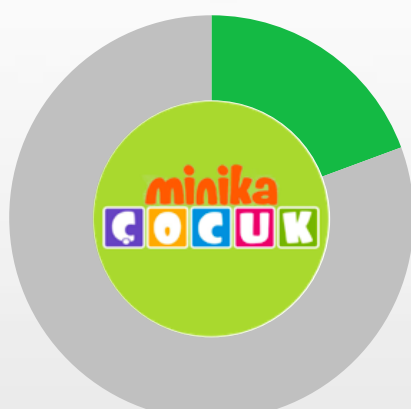
Weekly Reach - Total Sample

Reach

56% ↓ 17PP



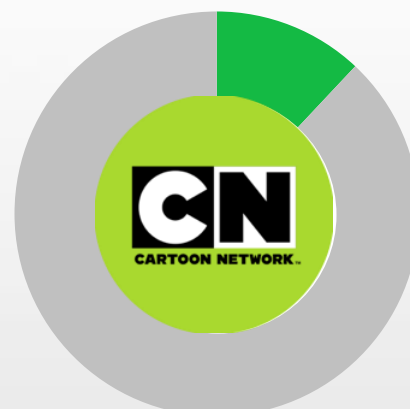
41% ↓ 14PP



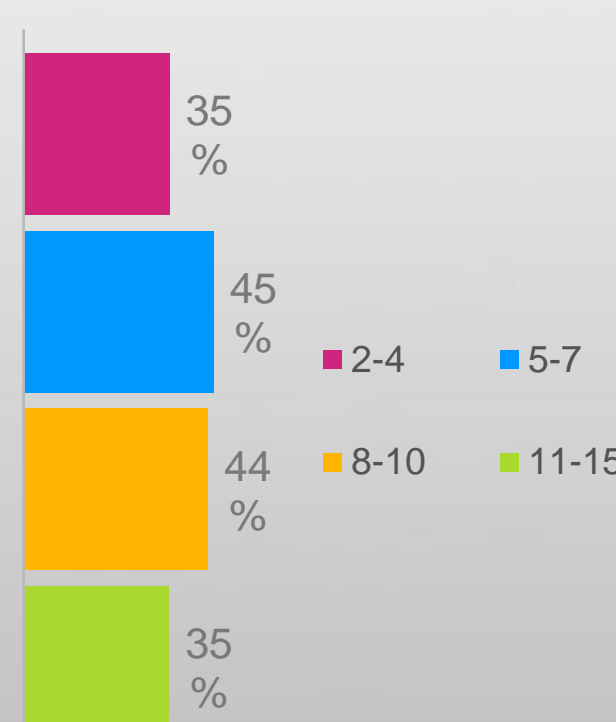
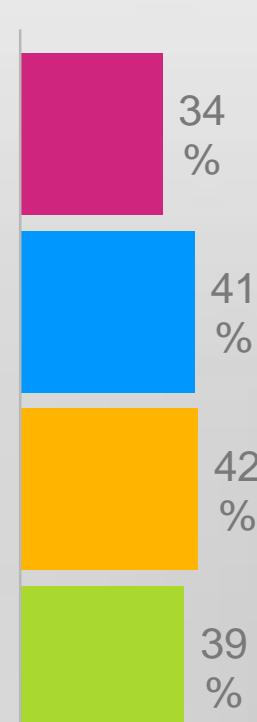
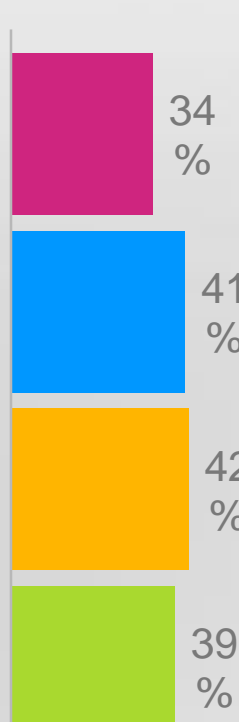
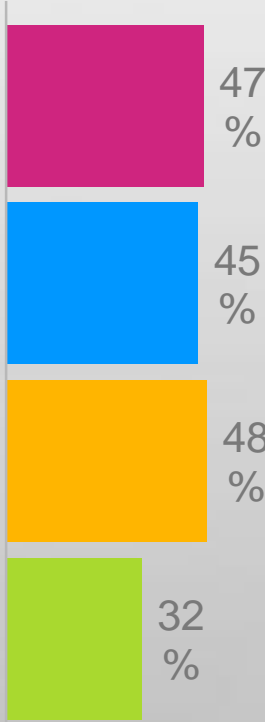
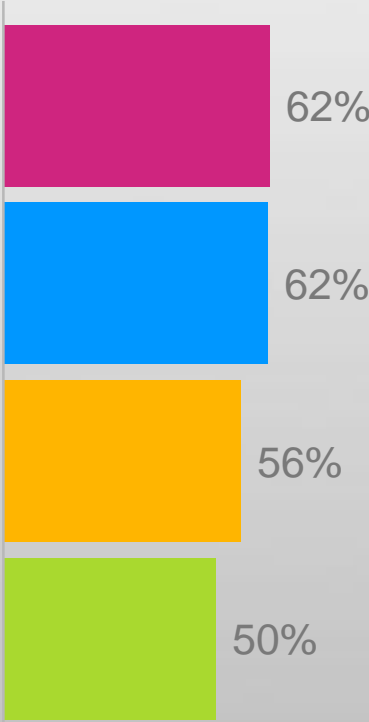
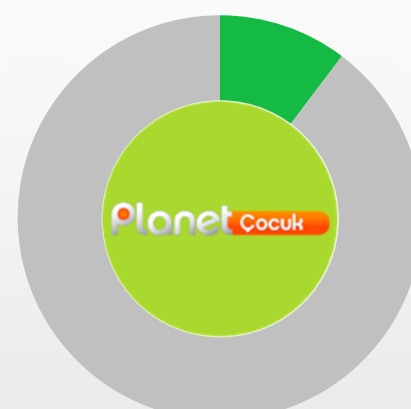
41% ↓ 12PP



39% ↓ 19PP



39% ↓ 15PP



Conversion

85%

73%

75%

72%

74%

Source: Dubit Trends. JQ5. And how often do you [does your child] watch/view the following?
(Base: FR Wave 8 1060, (2-4) 220, (5-7) 229, (8-10) 230, (11-15) 381)

↑ ↓ xPP - percentage points change +/- versus last year (Wave 6)

Key Points

Discover

TV remains the primary media platform for children hearing about new content and entertainment

New content discovery through television has declined year-on-year

Emerging online media platforms are becoming a place for discovery (as well as exploration)

Actively searching

Children actively seek new content as they get older

For the youngest children, brands are usually introduced by a parent

The most influential search sources among 5-7s: parents, peers and school

11-15s are turning more to online sources (e.g., YouTube, search engines and social media)

Talking about/sharing content

Word of mouth dominates conversation and recommendation about entertainment and brands



Hearing About New Entertainment

■ 2-4

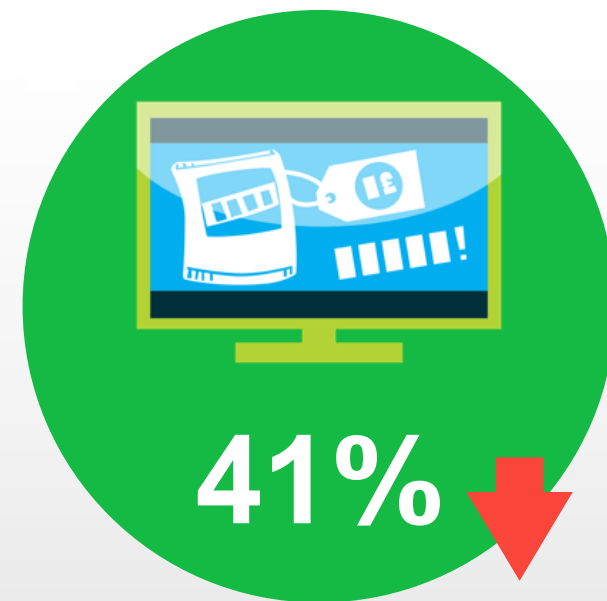
■ 5-7

■ 8-10

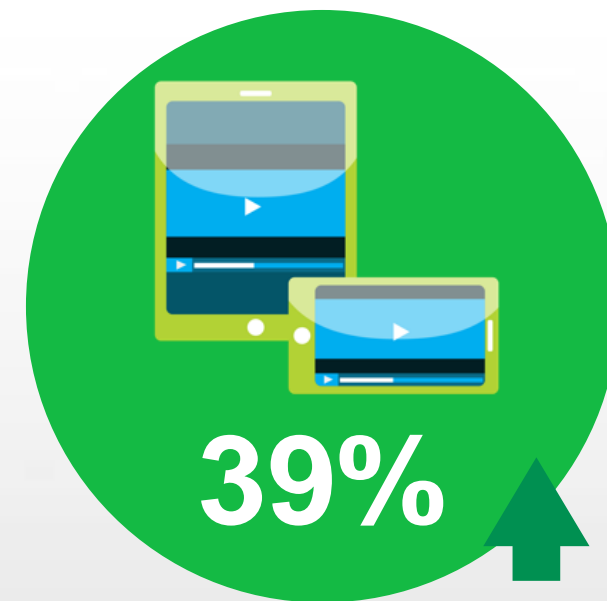
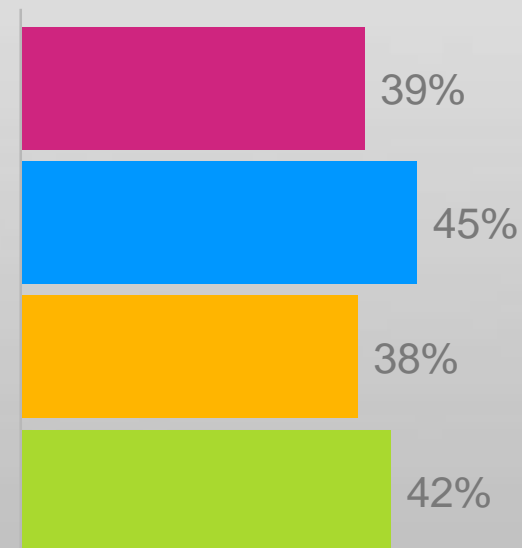
■ 11-15

Media platforms

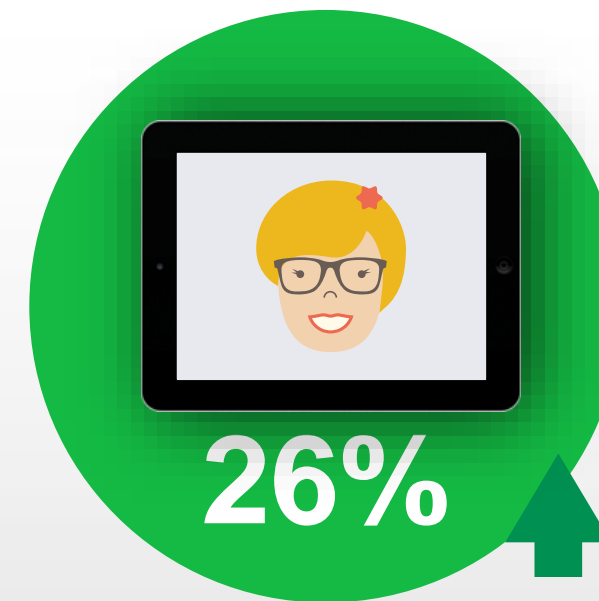
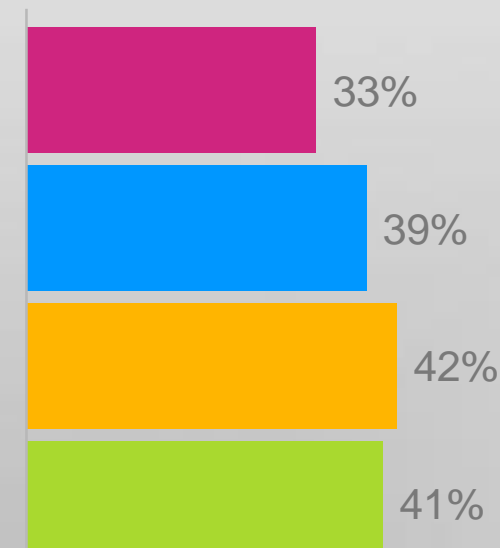
Total



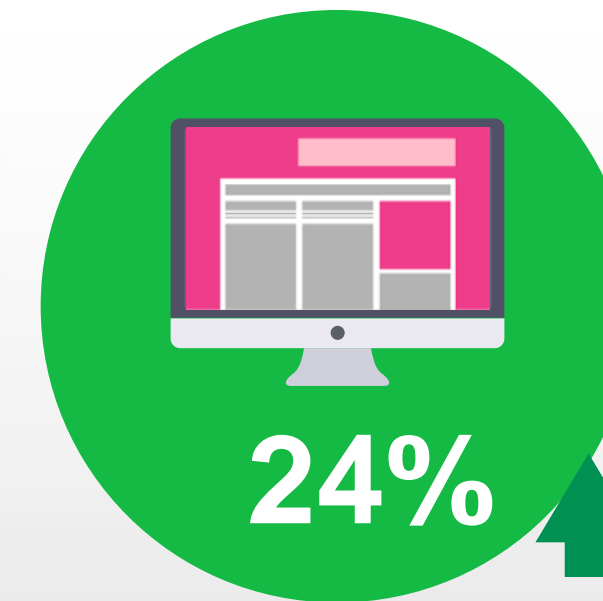
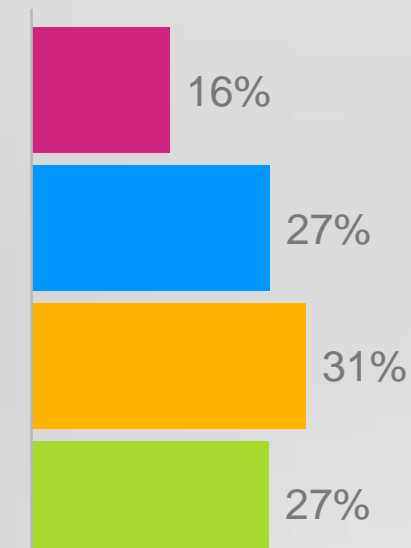
Adverts on TV



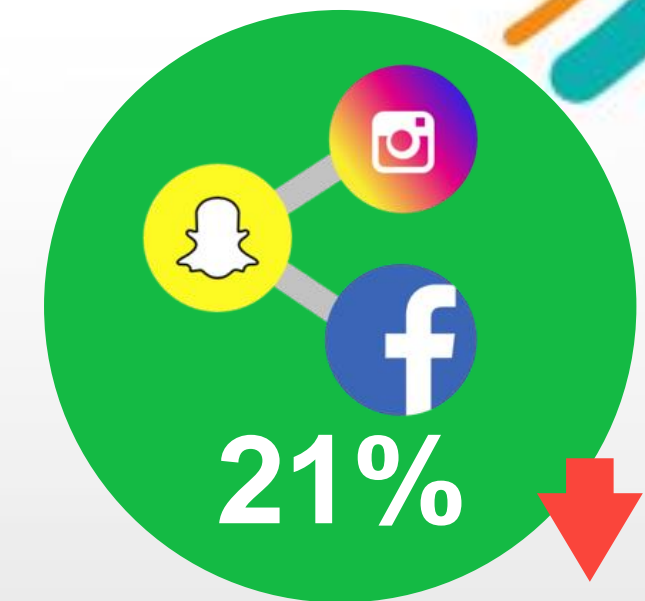
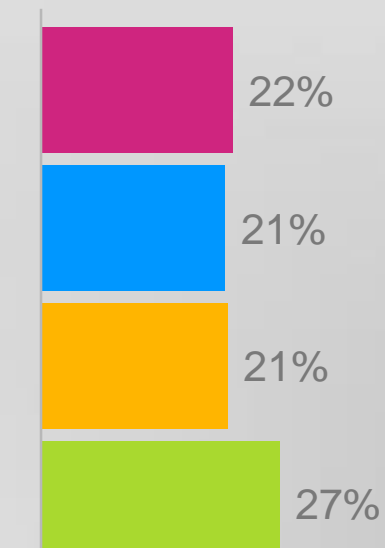
Online video



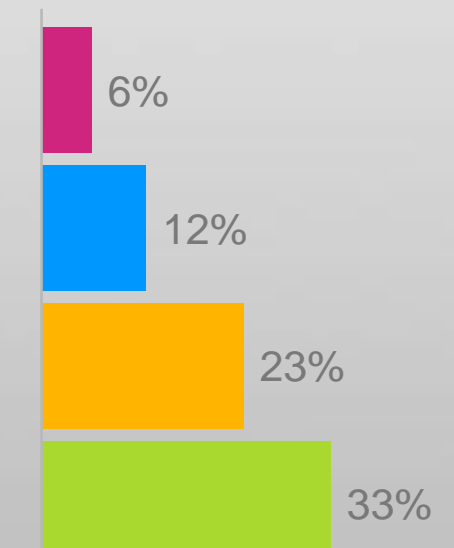
A YouTuber



Online ads



Social media



Source: Dubit Trends. CQ3. Thinking about how you first hear about a new app or show on television, where are you most likely to hear about it?
(Base: TR Wave 6 998, (2-4) 212, (5-7) 209, (8-10) 206, (11-15) 370 Wave 8 1043, (2-4) 222, (5-7) 219, (8-10) 215, (11-15) 387)



xPP - percentage points change +/- versus last year

Hearing About New Entertainment

■ 2-4

■ 5-7

■ 8-10

■ 11-15

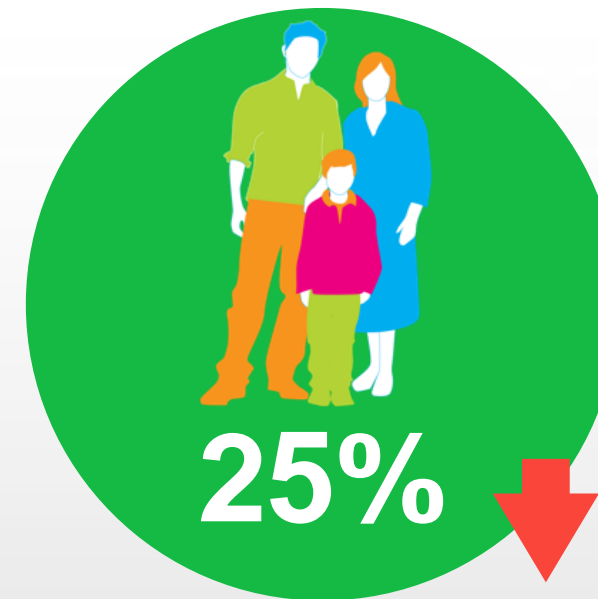
Word of mouth

Total



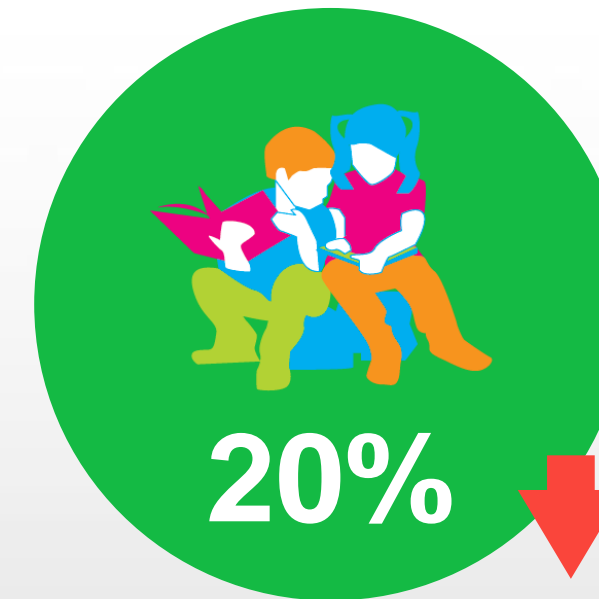
9PP

Friends



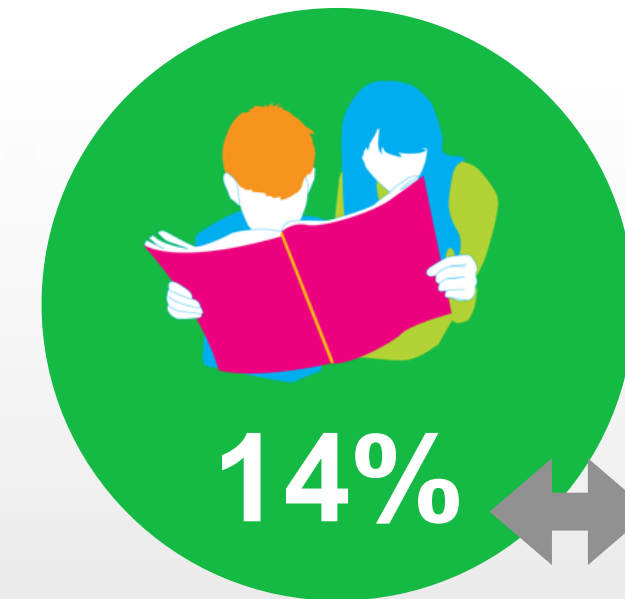
6PP

Parents



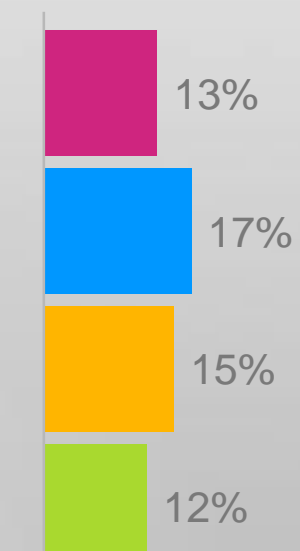
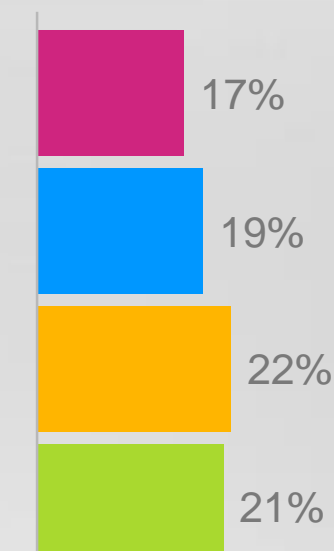
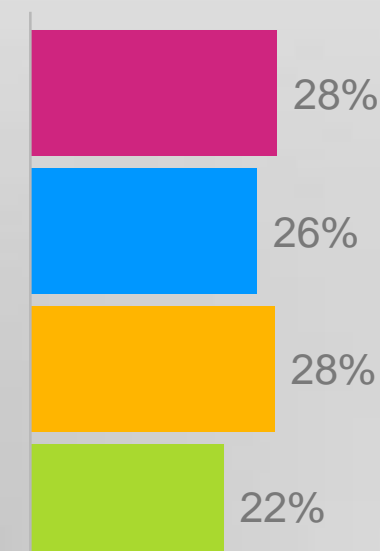
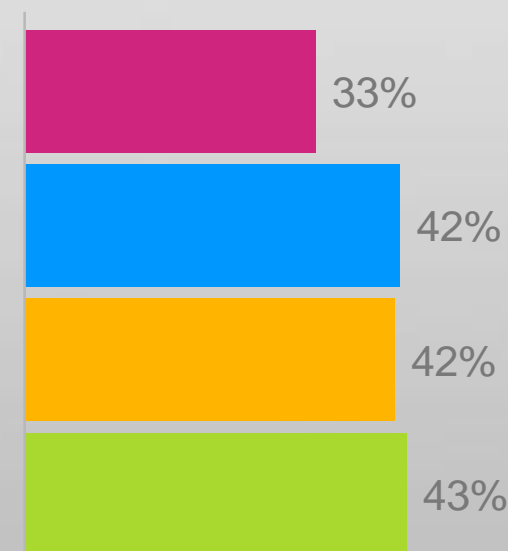
3PP

Siblings



No Change

Other adults



Source: Dubit Trends. CQ3. Thinking about how you first hear about a new app or show on television, where are you most likely to hear about it?
(Base: TR Wave 6 998, (2-4) 212, (5-7) 209, (8-10) 206, (11-15) 370 Wave 8 1043, (2-4) 222, (5-7) 219, (8-10) 215, (11-15) 387)



xPP - percentage points change +/- versus last year

Actively Searching New Content

■ 2-4 year olds

■ 5-7 year olds

■ 8-10 year olds

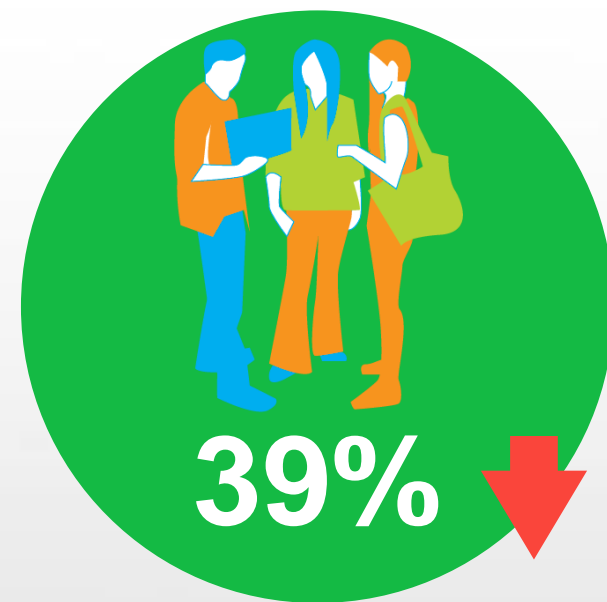
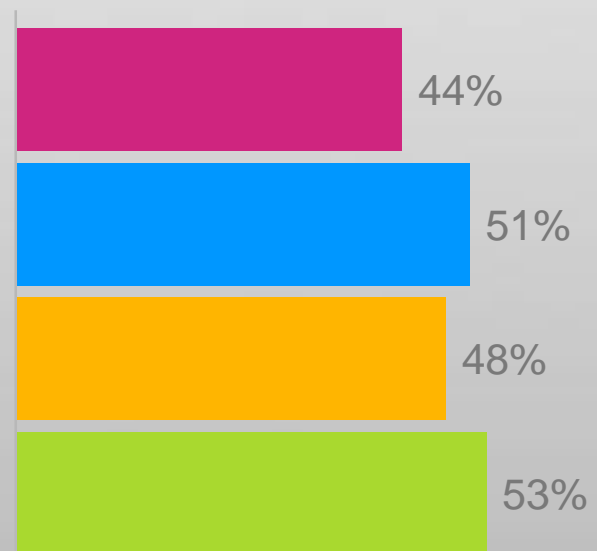
■ 11-15 year olds

Top 5 sources

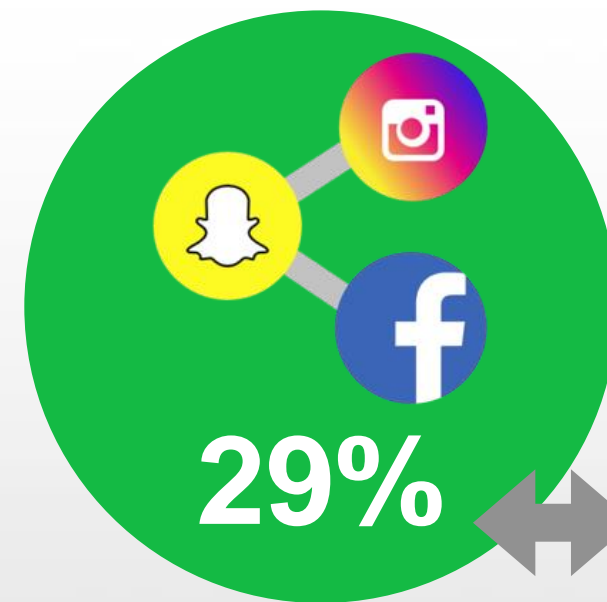
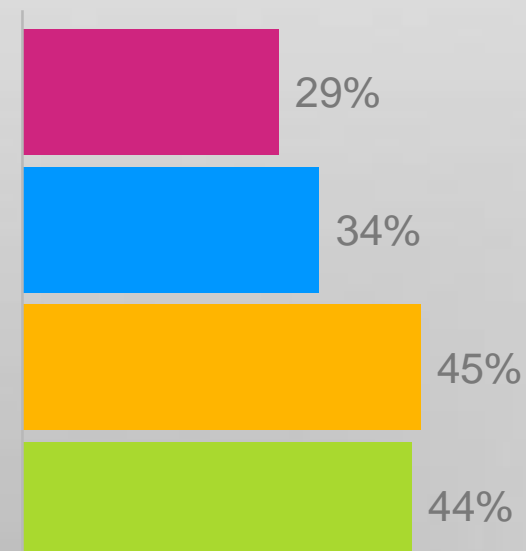
Total



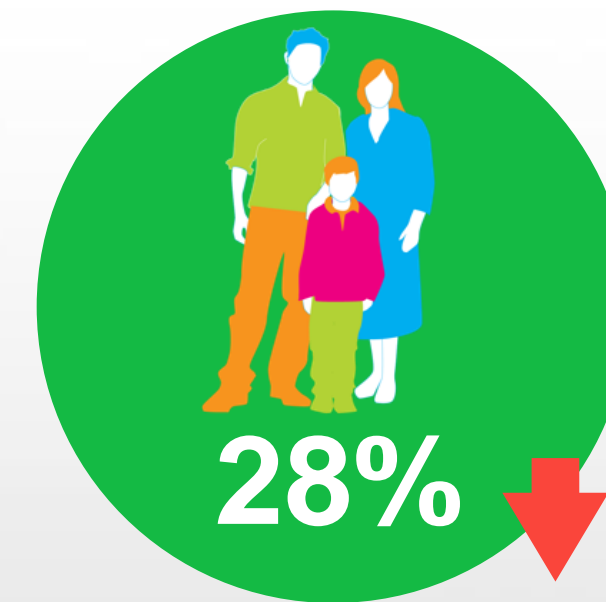
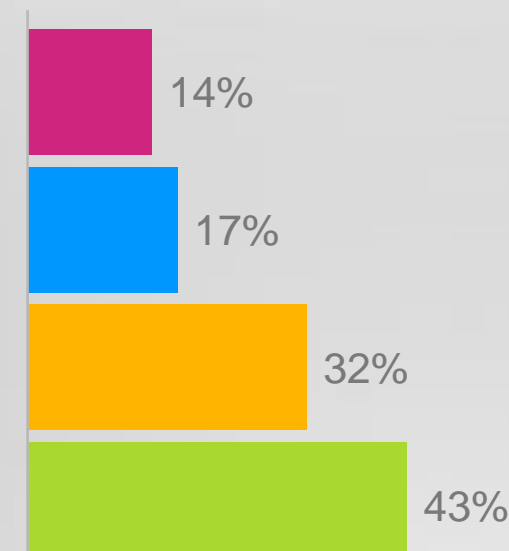
YouTube



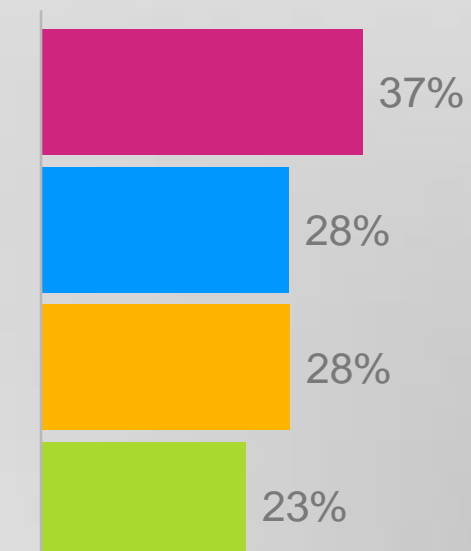
Friends



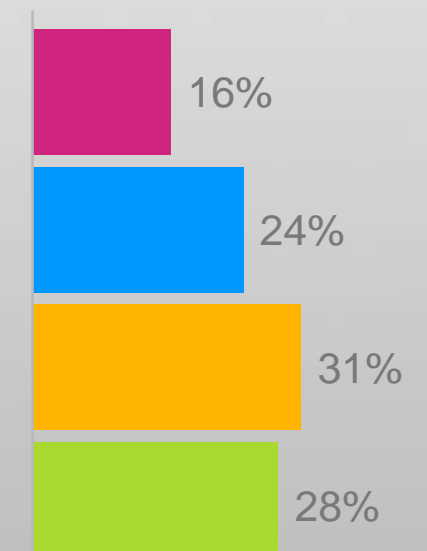
Social Media



Parents



Google Play



Source: Dubit Trends. CQ3.3. Thinking about how you first hear about a new app or show on television, where are you most likely to hear about it?
(Base: TR Wave 6 998, (2-4) 212, (5-7) 209, (8-10) 206, (11-15) 370 Wave 8 1043, (2-4) 222, (5-7) 219, (8-10) 215, (11-15) 387)

Emotional Scheduling Takeaways

Own a Moment - time, place, emotional state

What need am I fulfilling?

What existing behaviors or habits am I tapping?

Be Predictable, Accessible and Easy to Use

YouTube experts advise: frequent, consistent releases

Schedules aren't dead, just changed (e.g., Fortnite, HQ)



Emotional Scheduling Takeaways

Guided autonomy

Children's blocks outperforming children's channels

Kids choose curated streams rather than search

Know the buyer, as well as the user

Parents say yes to what they like, too, and see benefit from

Local/cultural content can satisfy parents and children



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Teşekkür Ederim

