

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"Parents' fears regarding their child's use of technology are numerous, with stranger danger, access to inappropriate content and cyberbullying at the top of the list. Technology brands are attempting to respond to these fears, giving parents greater control and creating child-friendly versions, as well as emphasising the positive role technology can play in aiding child development."

- Rebecca McGrath, Research Analyst

This report looks at the following areas:

- Responding to technology fears
- · The decline of traditional TV viewing

Major social and media networks, such as YouTube and Vine, have recently launched child-friendly versions of their services that have strict restrictions in terms of content in order to protect children and encourage parents to allow their children access.

Children's viewing habits continue to evolve, as they increasingly opt for varied online content, rather than traditional TV watching. Content producers and advertisers have to adapt to the changing landscape in order to reach this influential demographic.

For the purposes of this report, Mintel's definition of 'technology' includes smartphones, tablets, static games consoles, portable games consoles, e-readers, internet-connected smart televisions, desktop and laptop computers, gaming, social networking and any form of digital media consumption.

The terms 'teen', 'tween', 'child' and 'young people' have been used interchangeably to describe children aged 10-15.

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

+61 (0) 2 8284 8100

EMAIL: reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know

Covered in this report

Executive Summary

Nearly three quarters of teens/tweens use a smartphone

Figure 1: Technology used at home, March 2015

Strangers and inappropriate content are parents' greatest fears

Figure 2: Technology concerns, March 2015

YouTube use far higher among children

Figure 3: Social media websites/apps used, March 2015

Kids are interested in child-only social networks

Figure 4: Social media attitudes, March 2015

Most using second screen while watching TV

Figure 5: Technology behaviour, March 2015

Issues and Insights

Responding to technology fears

The facts

The implications

The decline of traditional TV viewing

The facts

The implications

The Market - What You Need to Know

Teens are watching significantly less live TV than adults

Sky makes content filtering the default

Google and Apple respond to the European Commissioner on in-app purchases

The Government and networks attempt to tackle cyberbullying

Market Drivers

Teens/tweens are watching significantly less live TV than adults

Figure 6: Minutes spent per day on 'viewing activities', by age, November 2014

Sky makes content filtering the default

Google and Apple respond to the European Commissioner on in-app purchases

The Government and networks attempt to tackle cyberbullying

Key Players - What You Need to Know

Vine launches child friendly version

YouTube launches YouTube Kids



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

FMAII: reports@mintel.com



Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

New data-free app, Jott, is on the rise

TeenSafe app set to get UK launch

Music streaming service only works when on the move

Horror series app explores new ways of storytelling

Launch Activity and Innovation

Music app gets kids moving

Major social networks create kid versions

Data-free app, Jott, is taking off

Dark Hearts explores storytelling

TeenSafe app set to get UK launch

The Consumer - What You Need to Know

Nearly three quarters of teens/tweens use a smartphone

Strangers and inappropriate content are parents' greatest fears

Most using second screen while watching TV

YouTube use far higher for children than for adults

Huge demand for tablets at school

Kids recognise the long life of posts

Technology Used

Nearly three quarters of teens/tweens use a smartphone

Figure 7: Technology used at home, March 2015

Girls are using smartphones earlier than boys

Figure 8: Technology used in the home, by gender of child, March 2015

Device use is impacted by age

Figure 9: Technology used in the home, by age of child, March 2015 $\,$

Three quarters of teens and tweens have their own tablet

Figure 10: Technology ownership, March 2015

Technology Concerns

Strangers and inappropriate content are parents' greatest fears

Figure 11: Technology concerns, March 2015

Concerns over harm to development

Over a fifth worried about online spending

Activities on Devices

Use of mobile devices for instant messaging grows

Figure 12: Activities performed on each device, March 2015

Figure 13: Use of social media on each device, March 2015

Tablet most popular personal device for watching TV shows

Technology Behaviour



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

EMAIL: reports@mintel.com



Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Most using second screen while watching TV

Figure 14: Technology behaviour, March 2015

Older children spend less time watching TV

Figure 15: Time spent going on the internet vs watching TV, by age, March 2015

Social Media Usage

YouTube use far higher than for adults

Figure 16: Social media websites/apps used, March 2015

Younger tweens using major networks despite restrictions

Figure 17: Social media websites/apps, by age of child, March 2015

Social Media Attitudes

Kids are interested in child-only social networks

Figure 18: Social media attitudes, March 2015

Kids seen to bully each other more online

Social media proving to be useful tool for meeting new friends

Kids recognise the long life of posts

Attitudes towards Technology

Huge demand for tablets at school

Figure 19: Technology attitudes, March 2015

Many concerned about who they are meeting

No clear preference for a book format

Half believe they have seen inappropriate content

Figure 20: Viewing inappropriate content, by social media networks used in last month, March 2015

Significant value in online promotion

Figure 21: Interest in purchasing product seen online, by social media network used in last month, March 2015

Appendix

Data sources

Abbreviations

VISIT: store.mintel.com

Americas +1 (312) 943 5250 APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.cor