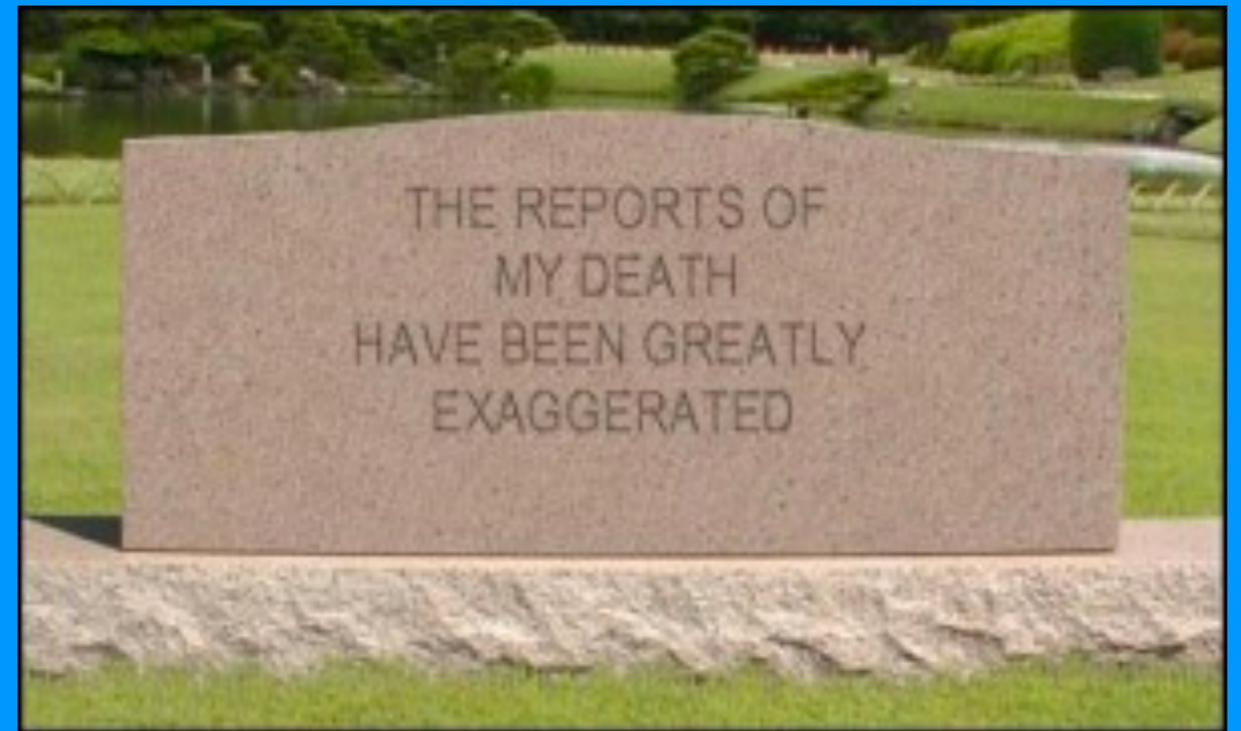


# *Kids, Screens & Pages*

*The Book  
is Dead.  
Long Live  
the Book!*



*David Kleeman, SVP Global Trends, Dubit*



# *Kids, Screens & Pages: A Pre-cap*

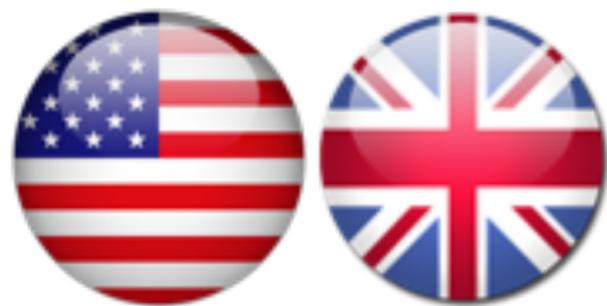
- Challenges of the Children's Media Landscape
- Usability & Development: Early Digital Literacy
- Where's the Narrative? Birds & Candy Boom
- Print...Resurgent
- Kids Still Crave Good Stories & Start With Books



# Where The Data Comes From

Dubit Trends is a quarterly survey of 1000 families each in the US, UK & one other country.

It provides in-depth insights into the media and entertainment consumption of children and young teens.



Every wave

Q1 2015



Q2 2015



Q3 2015



(500 families each)



# Where The Data Comes From



## **Partners:**

Universities of Sheffield & Edinburgh  
Dubit  
Cbeebies  
Montney Primary School  
Foundling Bird

## **Methods (children 0 – 5):**

2000-family online survey  
6 in-depth family interviews  
12 child observations & interviews  
Analysis of 10 popular apps'  
affordances for play & creativity



*Challenges  
of the  
Children's  
Media  
Landscape*



# *Content Tsunami*

Kids consume content on a wide variety of devices

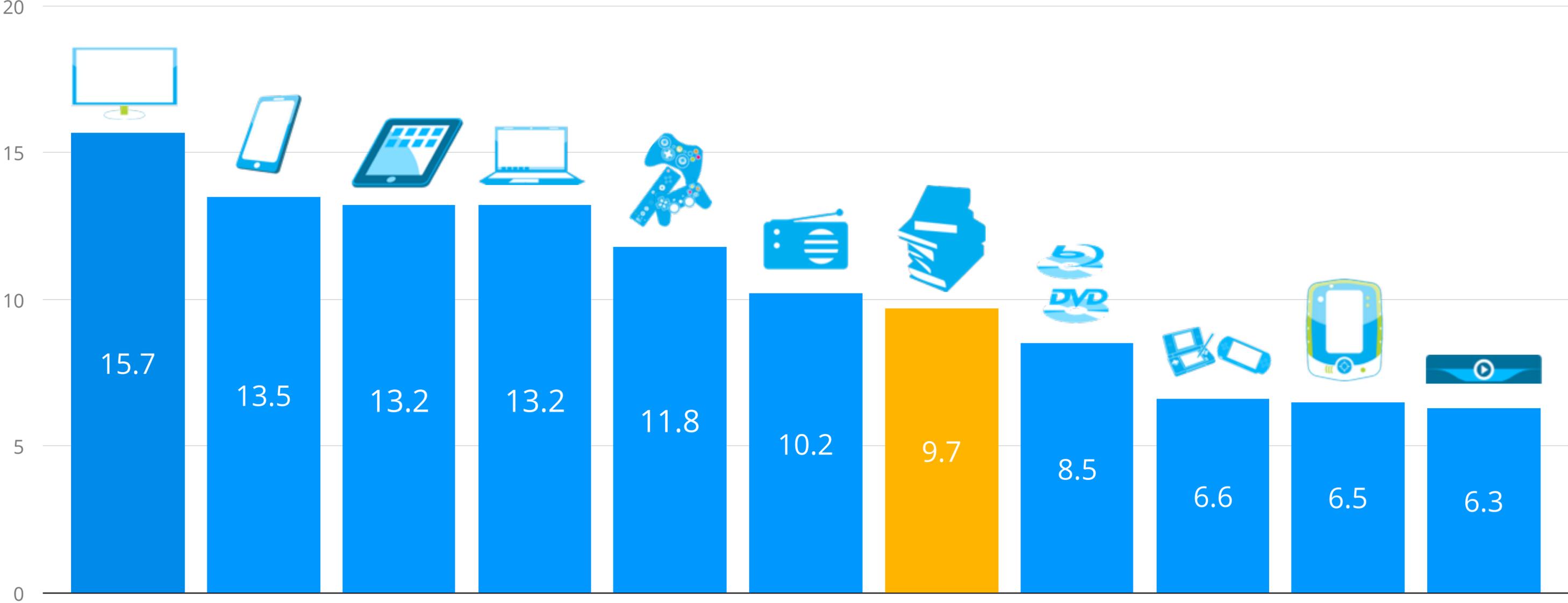
Increasingly, the device of choice is the tablet

On the tablet, *everything competes with everything*

“Content is King,” but the King needs discovery to rule



# Content Tsunami: Hours per week (2 - 15)



A-Q4. On a typical WEEKDAY day, we'd like you to tell us how much time you think you spend on that device/piece of equipment? (Base 1000 US)  
A-Q5. On a typical WEEKEND day, we'd like you to tell us how much time you think you spend on that device/piece of equipment? (Base 1000 US)



# Content Tsunami: Favorite Brands (Unaided, 5-7)

		 TV	 Games 
	Boys:	<b>134</b>	<b>98</b>
	Girls:	99	92
	Boys:	112	82
	Girls:	<b>116</b>	71
	Boys:	68	43
	Girls:	39	23
	Boys:	73	<b>85</b>
	Girls:	69	70

US/UK = 1000 respondents each; Australia/Malaysia = 500 respondents each



# *Water, Water Everywhere*

Despite ubiquitous content,  
across age groups

>60%

kids often/sometimes get  
frustrated trying to find  
something to watch



# *Driving Discovery & Sharing*

Innovators Set the Pattern

- *Early Adopters Share Most Often*
- *Appeal to their Sense of Risk/Exclusivity*

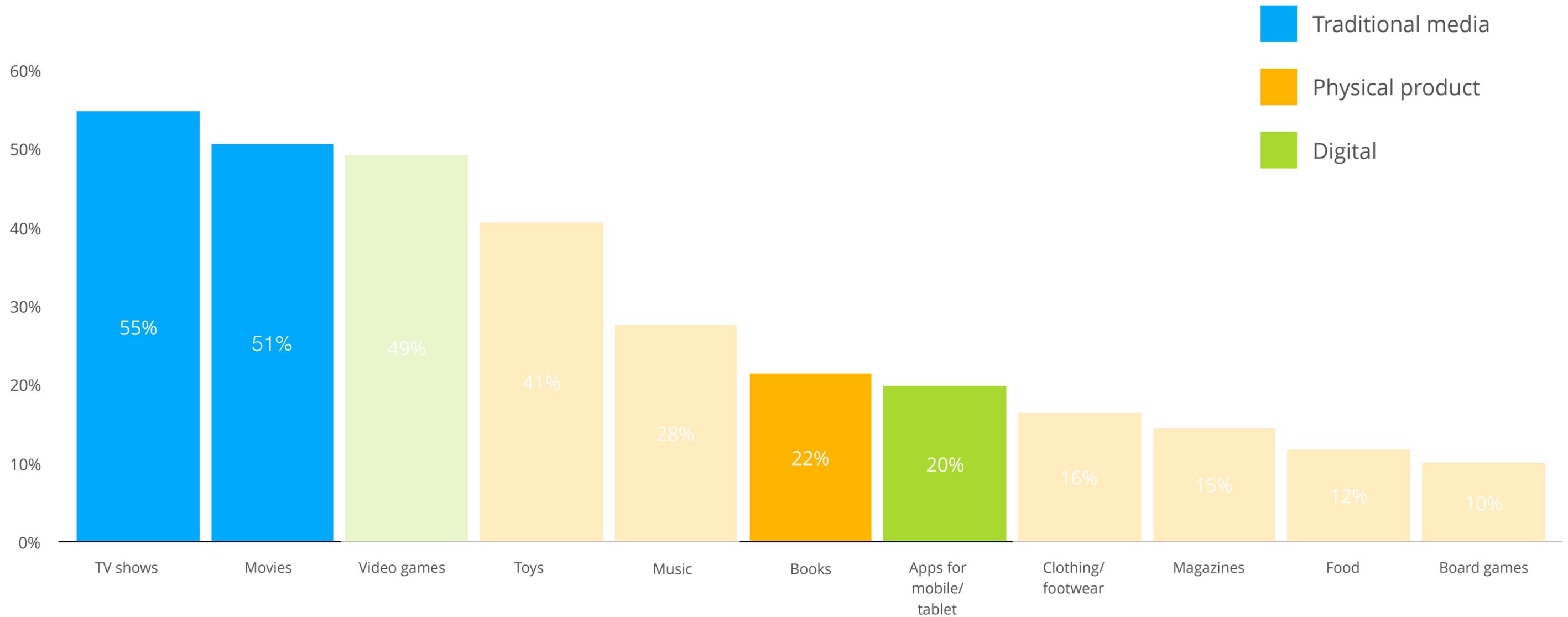
Don't Ignore Traditional Resources

- *Playground WOM / Friends*
- *Parents*
- *Television*

Know When/How/Why Kids Use Media



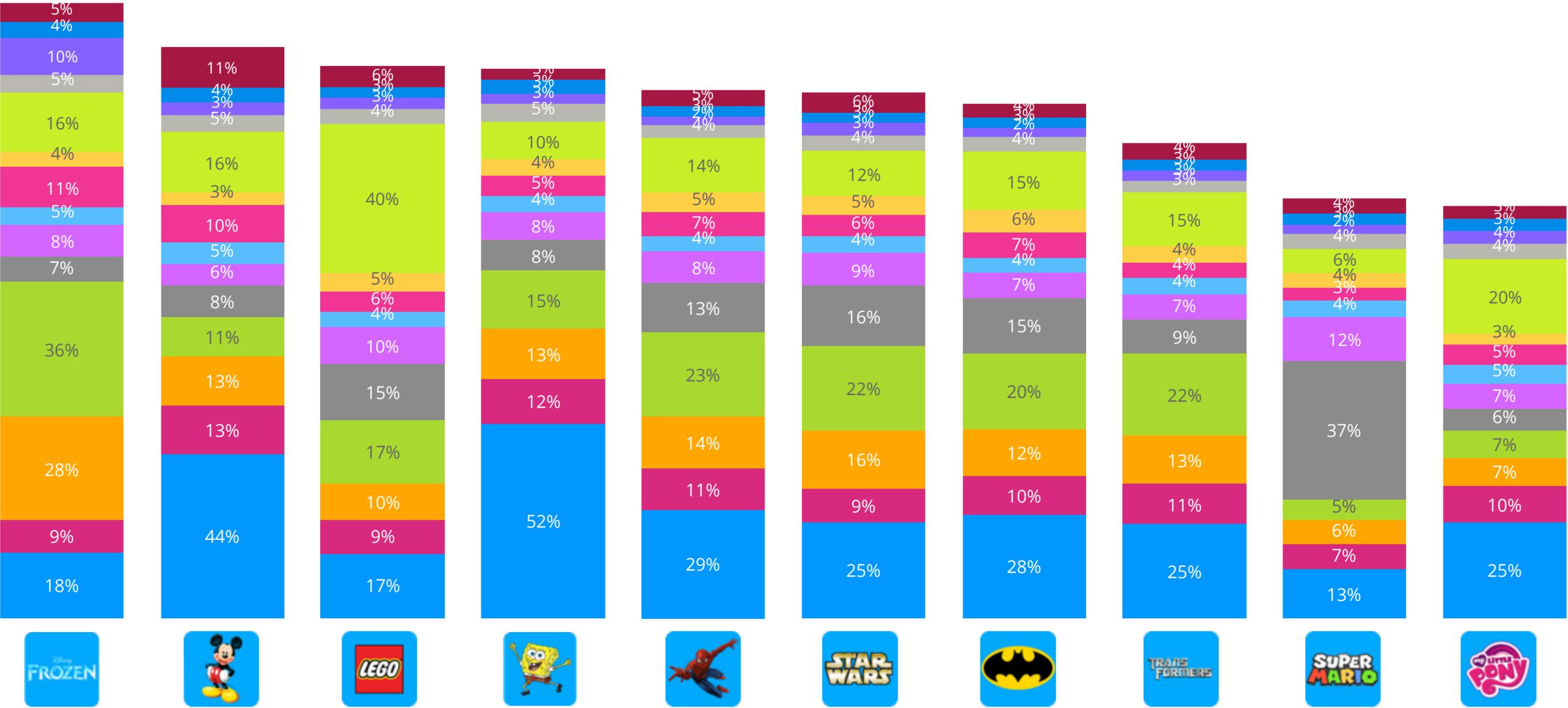
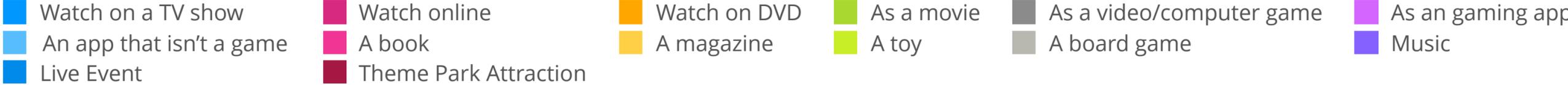
# Type of Content Recommended: Total



C-Q6.. Which of these do you tend to recommend and talk about most to friends? (Base 1000 US)



# How the Top 10 Brands Cross Platforms



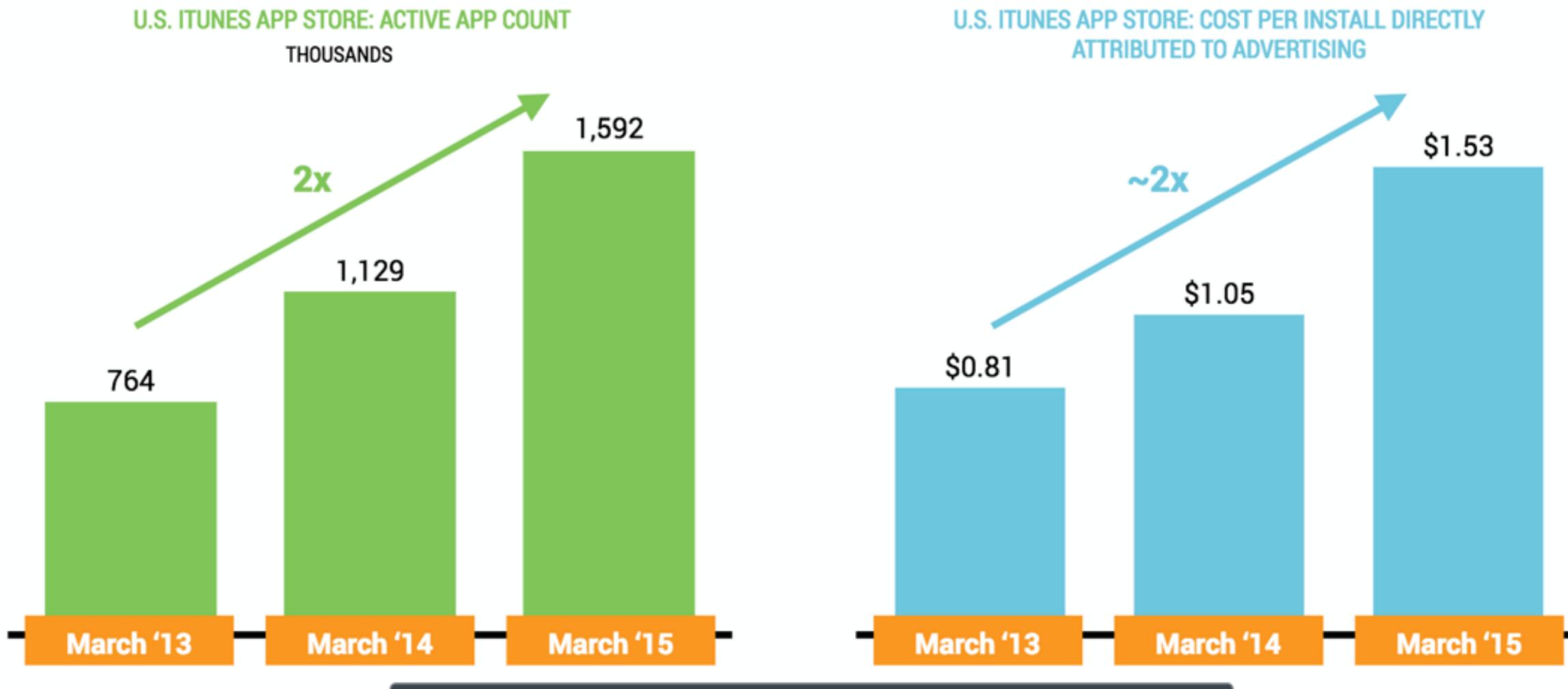
B-Q14. We are going to show you a selection of toys, games, apps, TV shows and books, for each one we'd like you to tell us how you enjoy them? (Base 1000 US)



# Digital Challenge: App Count Adds Discovery Cost

App count continues to grow exponentially...

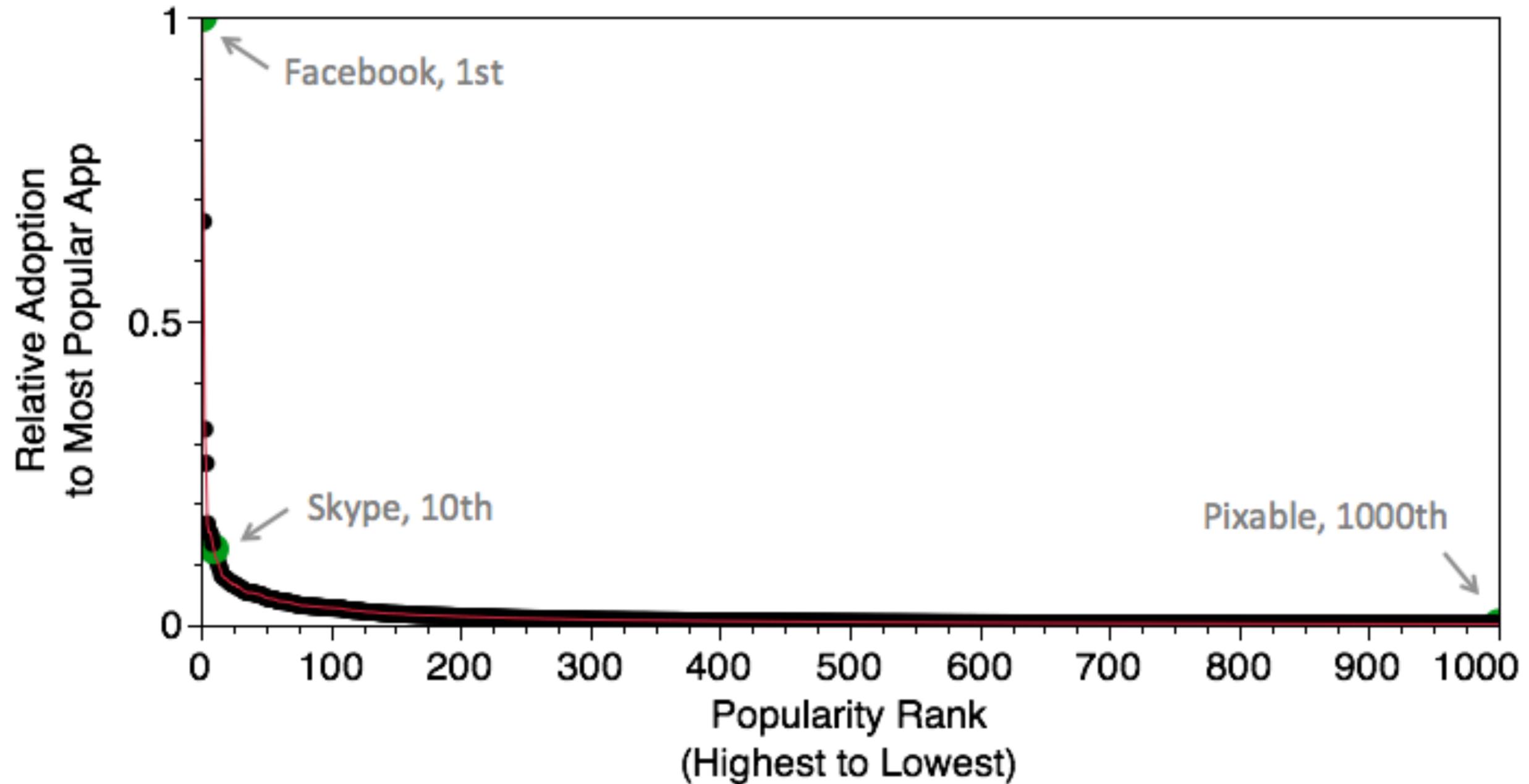
...along with the cost to earn downloads



Michael Wolf, Tech & Media Outlook 2016, Wall Street Journal Digital Live Conference



# Less Than .005% of All Apps = 60% of Store Revenue



[medium.com](https://medium.com): "Mobile App Developers are Suffering"



# *Revenue Models: The Least Worst Option?*

Subscription?

*VOD, Games, Books - Subscription Fatigue*

Advertising?

*Fragmented Marketplace, Effectiveness*

“Freemium”?

*Ethics and Parental Unhappiness*

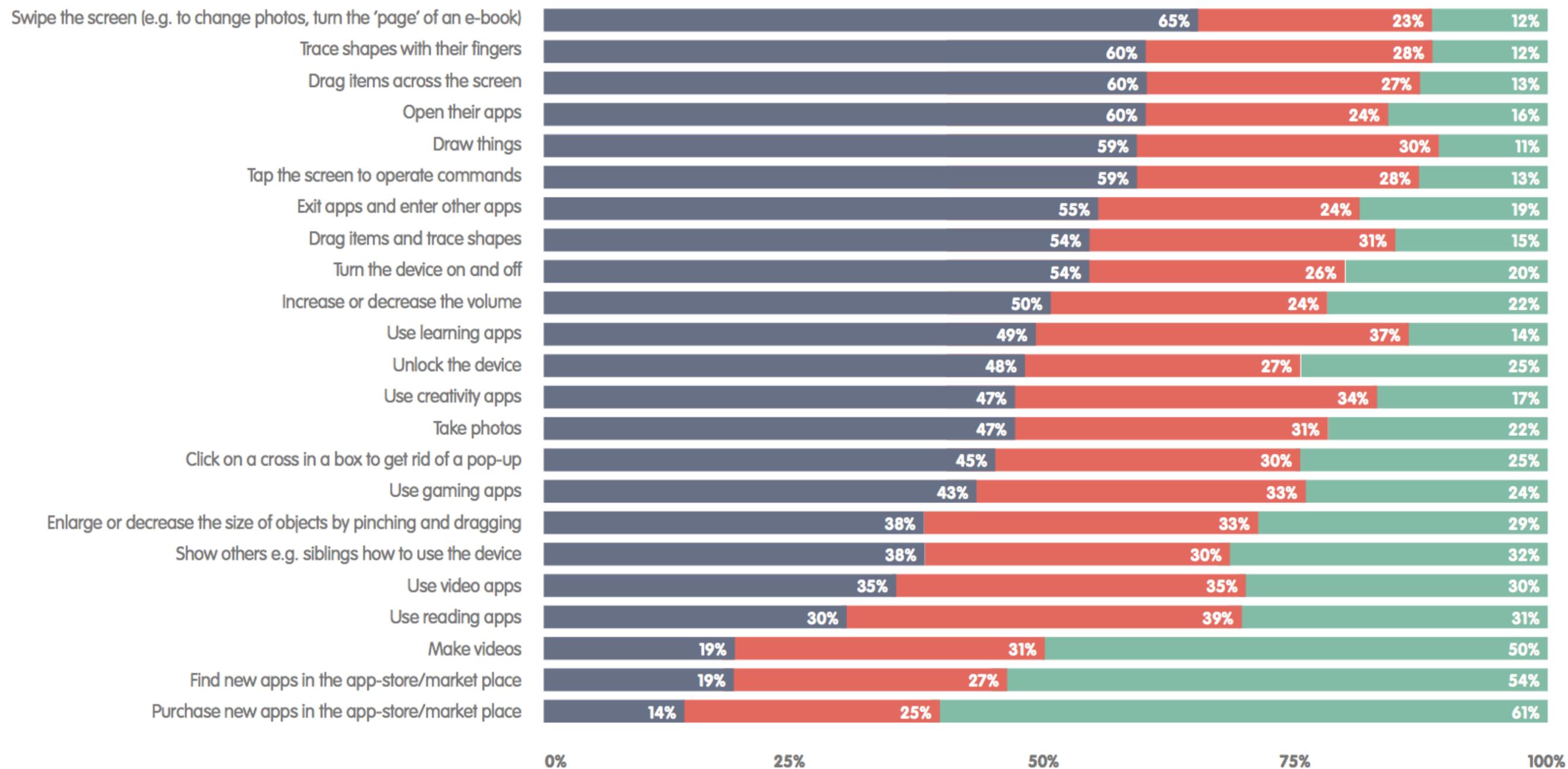
*Usability & Development:  
Early  
Digital  
Literacy*



# Tablet Use: Capability Alone and Assisted

## Tablet Use: Competence

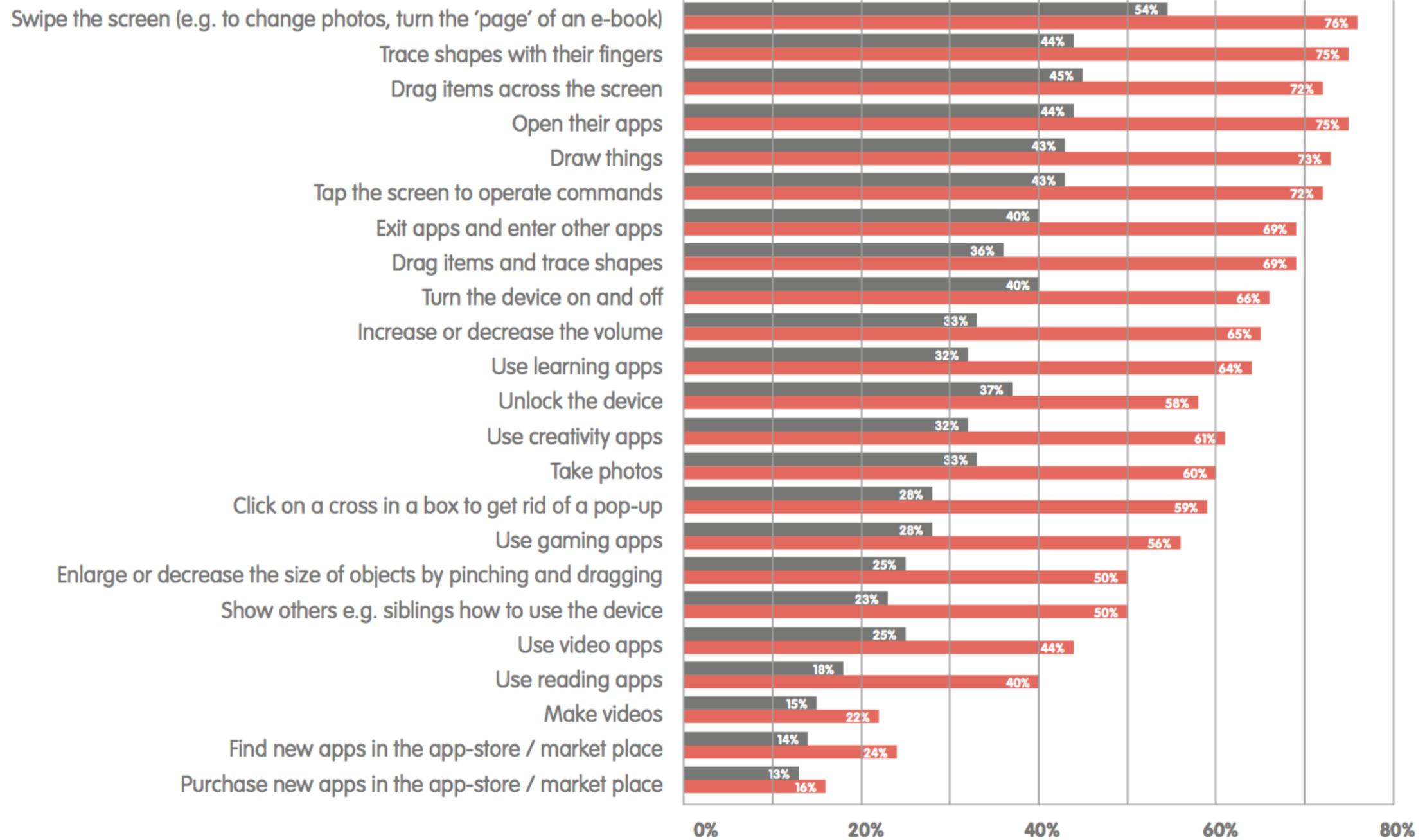
● Is able to do unassisted ● Needs some assistance ● Is unable to do/unaware of



# Tablet Use: Competencies by Age

Figure 4: A comparison of what 0-2s and 3-5s can do unassisted when using a tablet

● 0-2 ● 3-5



Source: DQ1 We want to understand how comfortable your child is using a tablet. (Base 2000)



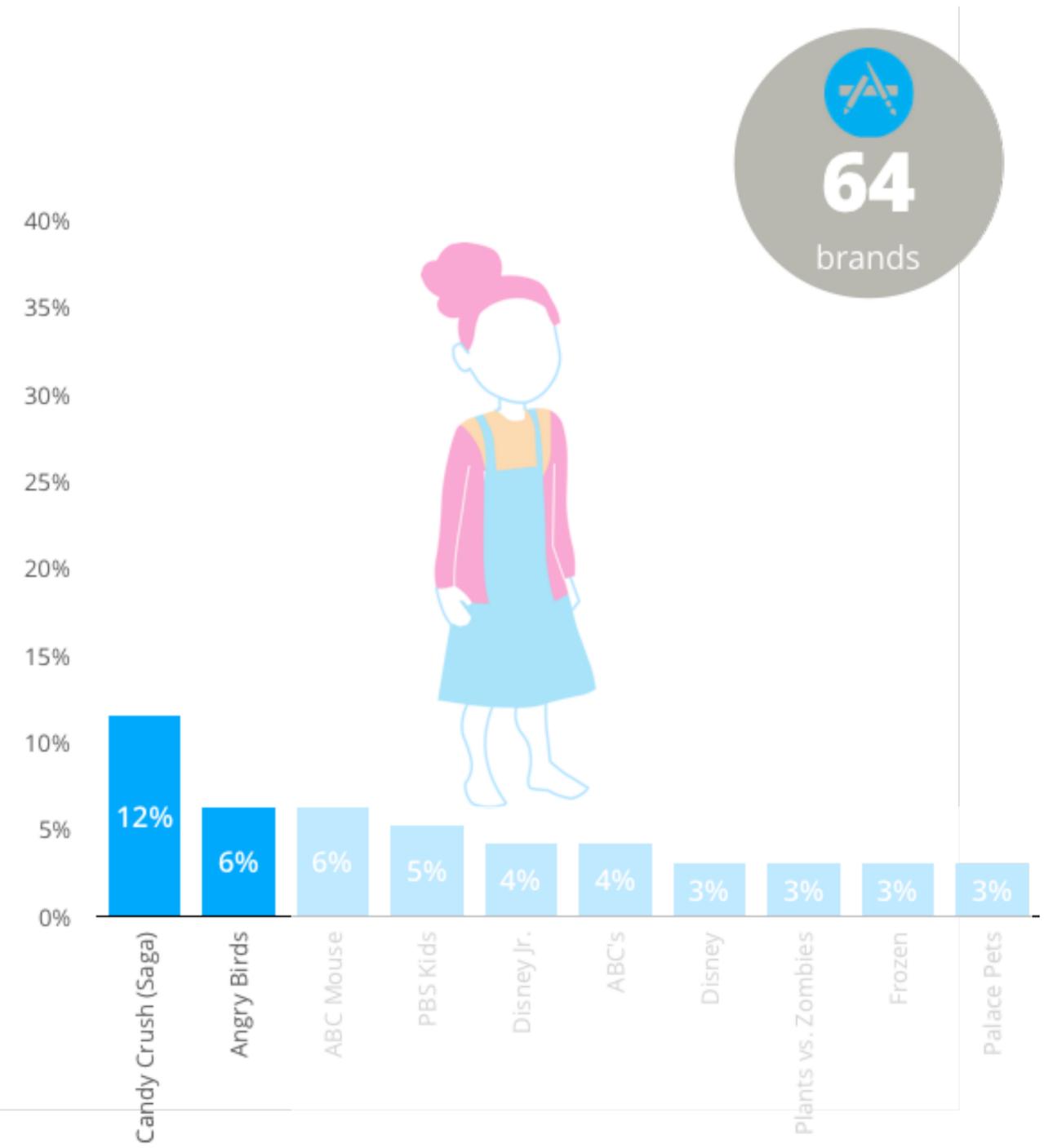
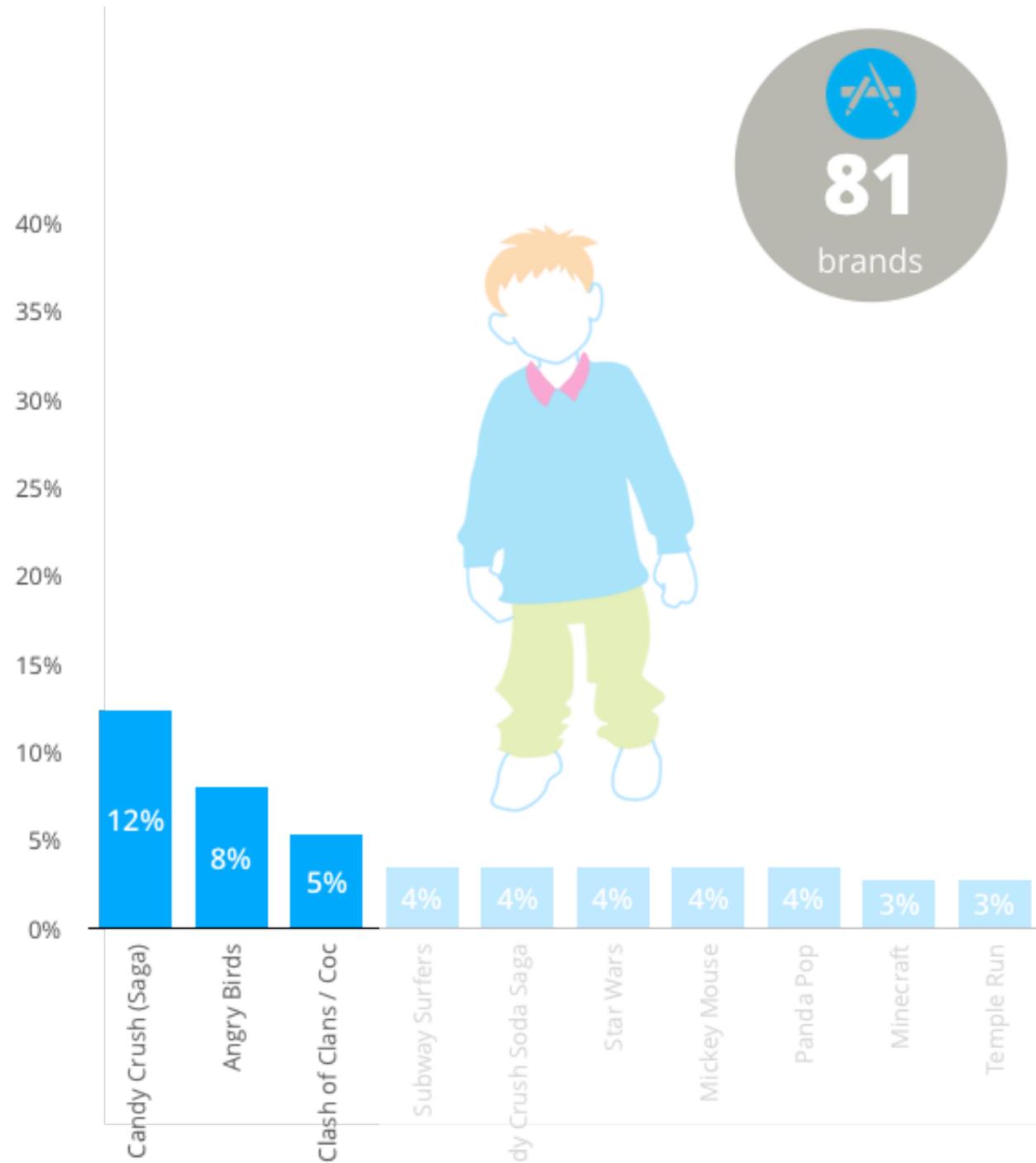
*Where's the  
Narrative?*



*Birds & Candy Boom*



# Top Apps: Gaming (2-4 year olds, USA)



BQ2 - Name three gaming apps for mobile or tablet that you like the most right now? (Base 1140 US)



# *Top Apps: Gaming (2-4 year olds, International)*

These same titles appear atop kids' favorites:



UK:

Candy Crush #1, Angry Birds #3 (boys & girls)



Australia:

Angry Birds #1, Candy Crush #2 (boys)  
Angry Birds #2, Candy Crush #3 (girls)



Malaysia:

Candy Crush #1, Clash of Clans #2, Angry Birds #3 (boys)  
Candy Crush #1, Angry Birds #2, Clash of Clans #3 (girls)



Brazil

Candy Crush #2, Angry Birds #3 (boys & girls)



# *Top Apps: What's the Appeal?*



## **What “Candy Crush” & Angry Birds Do Have**

Modeling (parents & siblings)

Intuitive playability & appropriate mechanics (basic level)

Colorful graphics

Action

## **What “Candy Crush” & “Angry Birds” Don’t Have**

Narrative

Character development

Opportunities for creativity

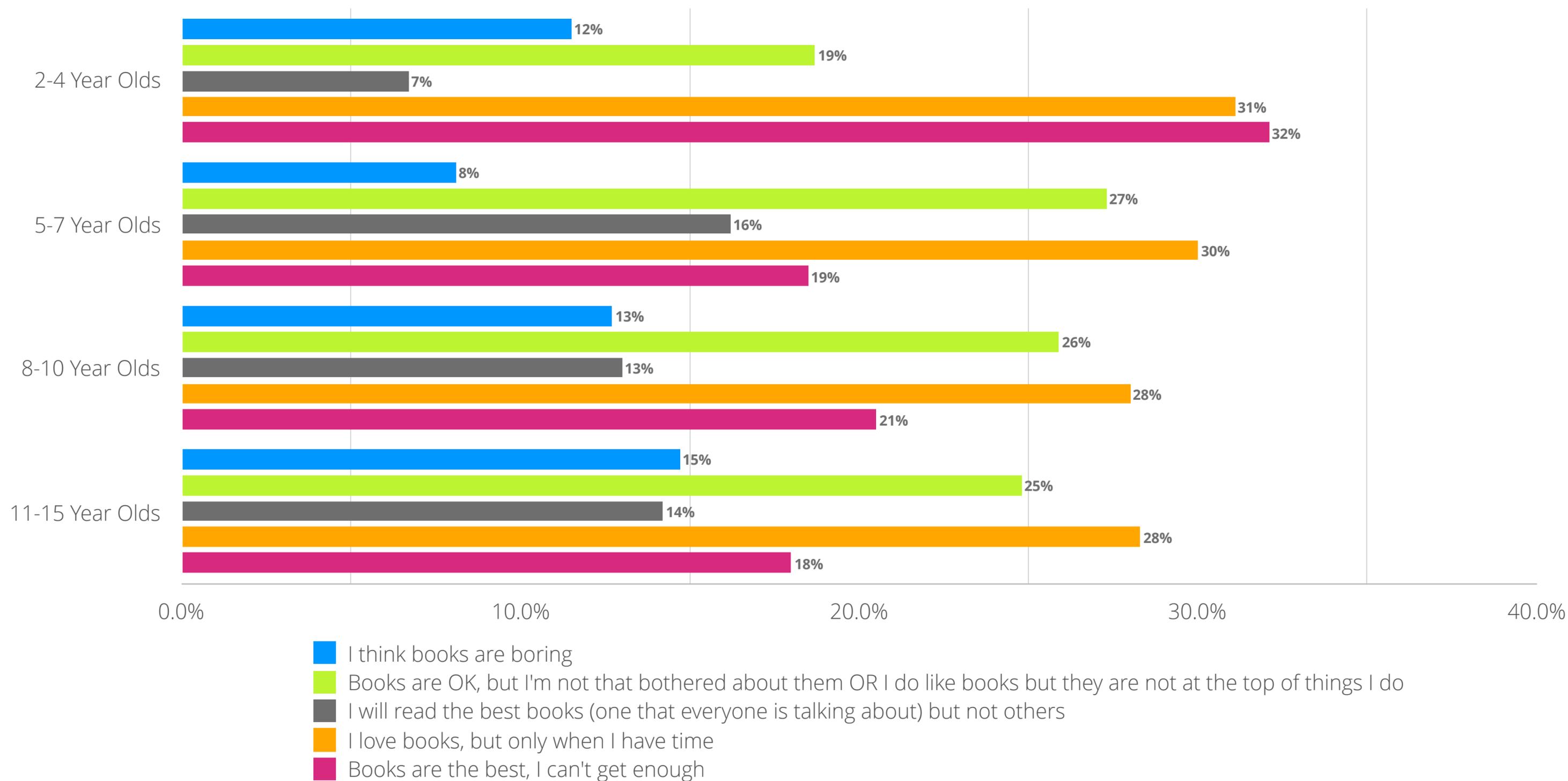
Scaffolding for gaining competence



*Print...*  
*Resurgent*



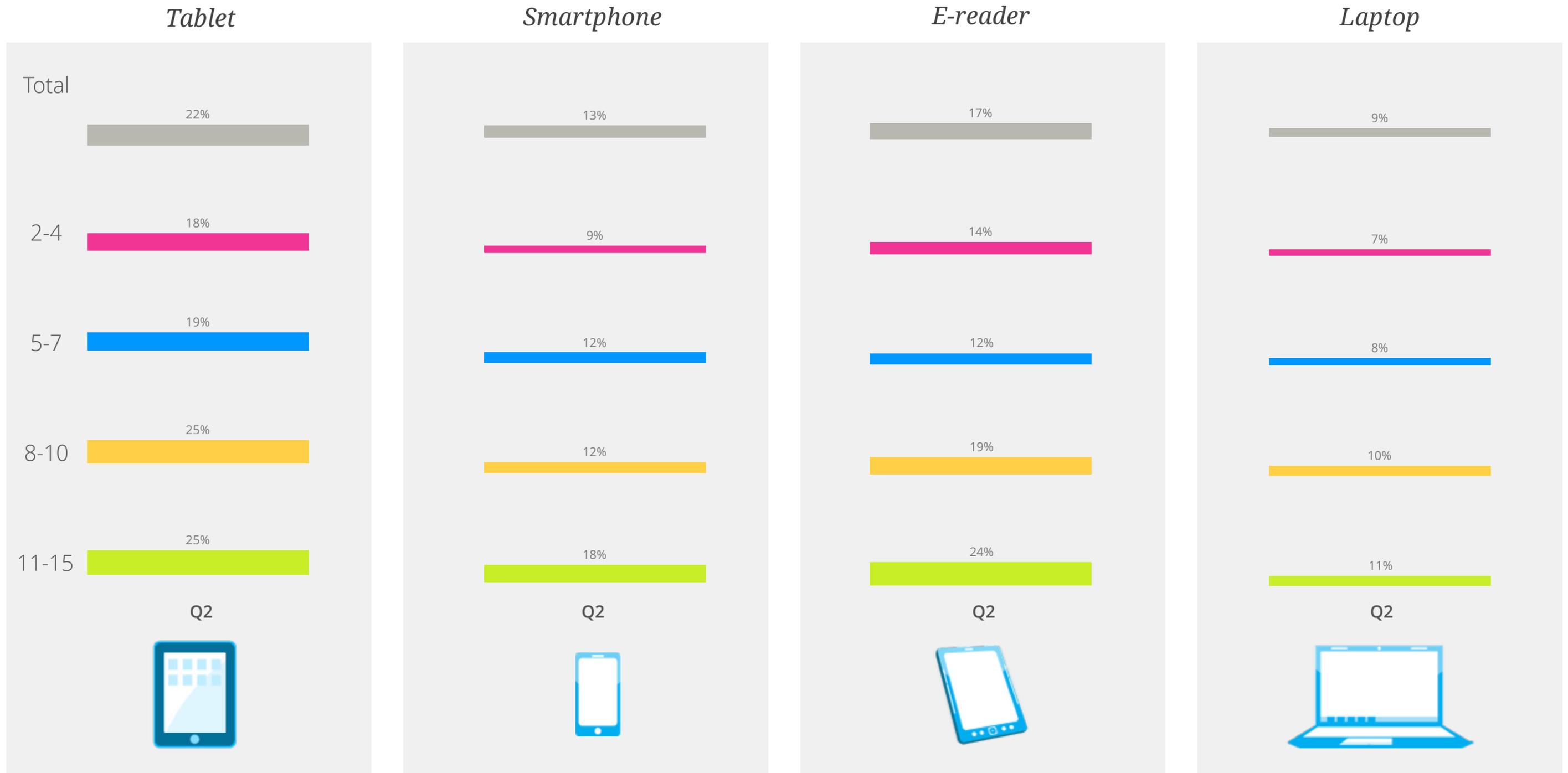
# Reading Attitudes Headline: Kids Like to Read



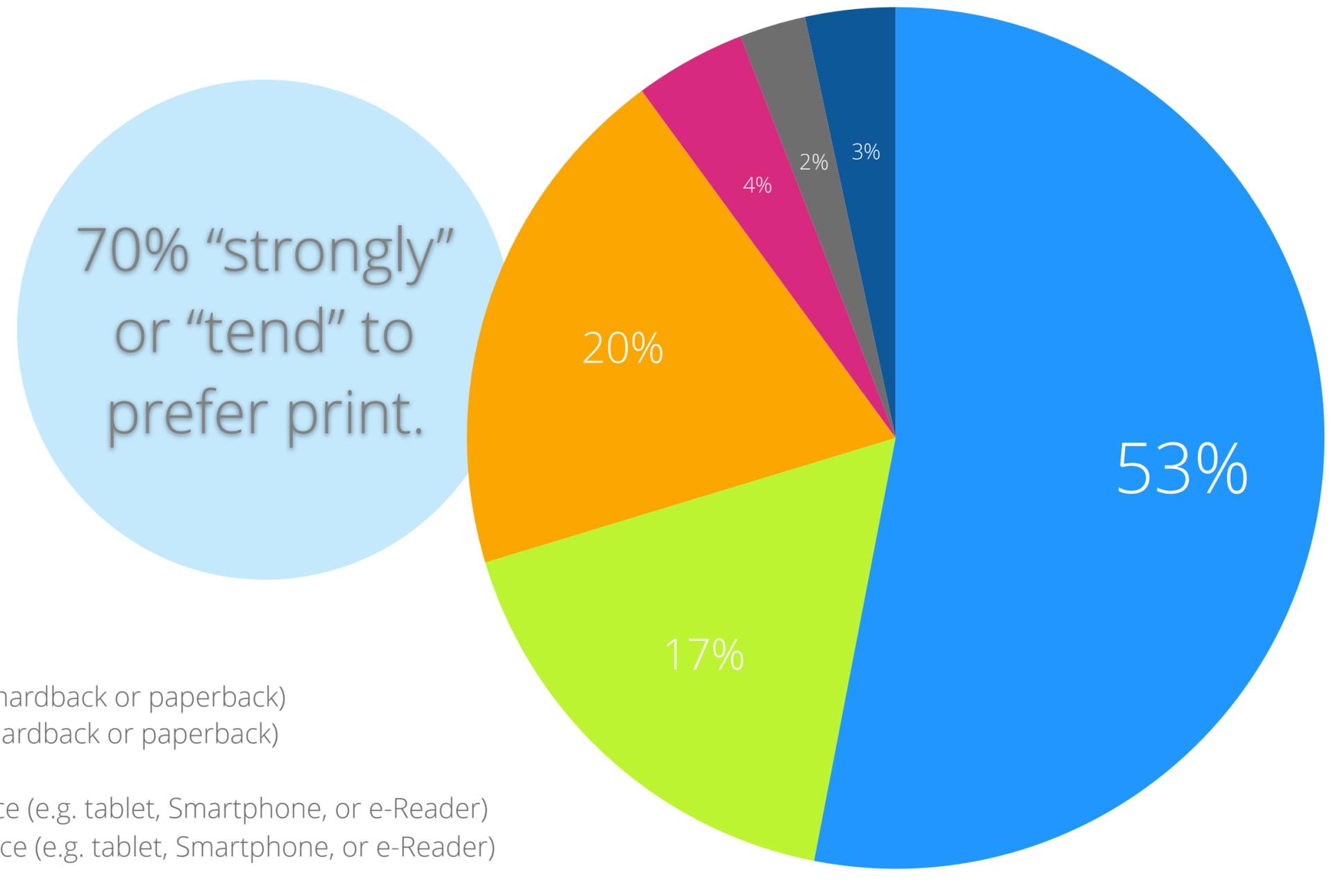
GQ2B: Which of the following statements most describes you? (Base: 1140)



# Chasing Books Across Platforms



# Reading Preference Headline: Kids Prefer Print

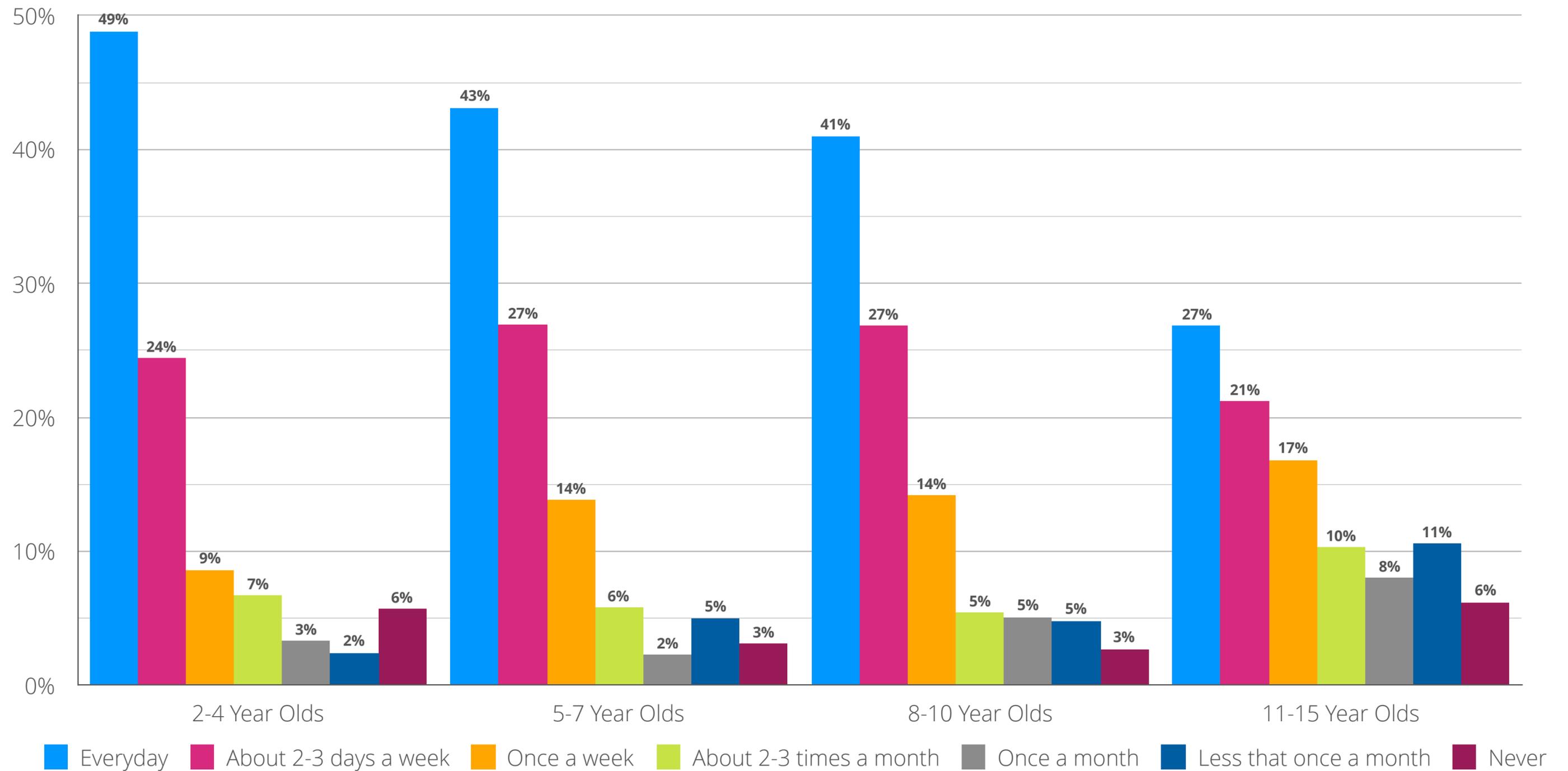


- Strongly prefer reading printed books (either hardback or paperback)
- Tend to prefer reading printed books (either hardback or paperback)
- Have no preference
- Tend to prefer reading books on a digital device (e.g. tablet, Smartphone, or e-Reader)
- Strongly prefer reading books on a digital device (e.g. tablet, Smartphone, or e-Reader)
- Don't know

GQ2A: What is your preferred way to read books? (Base: 1140)



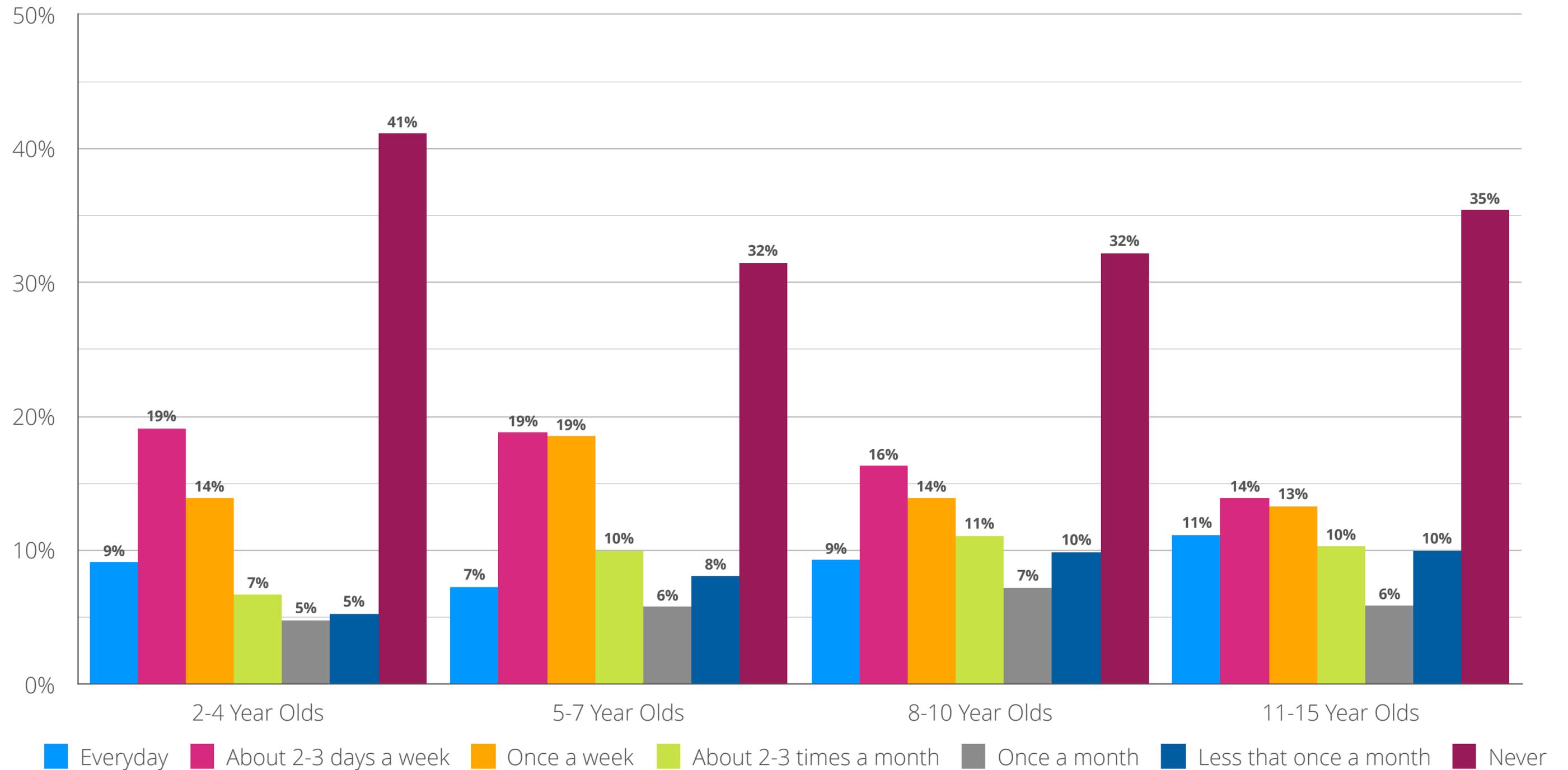
# Reading Frequency: Hardback/Paperback Book



GQ4B\_1: How often do you do each of the following? (Base: 1140)



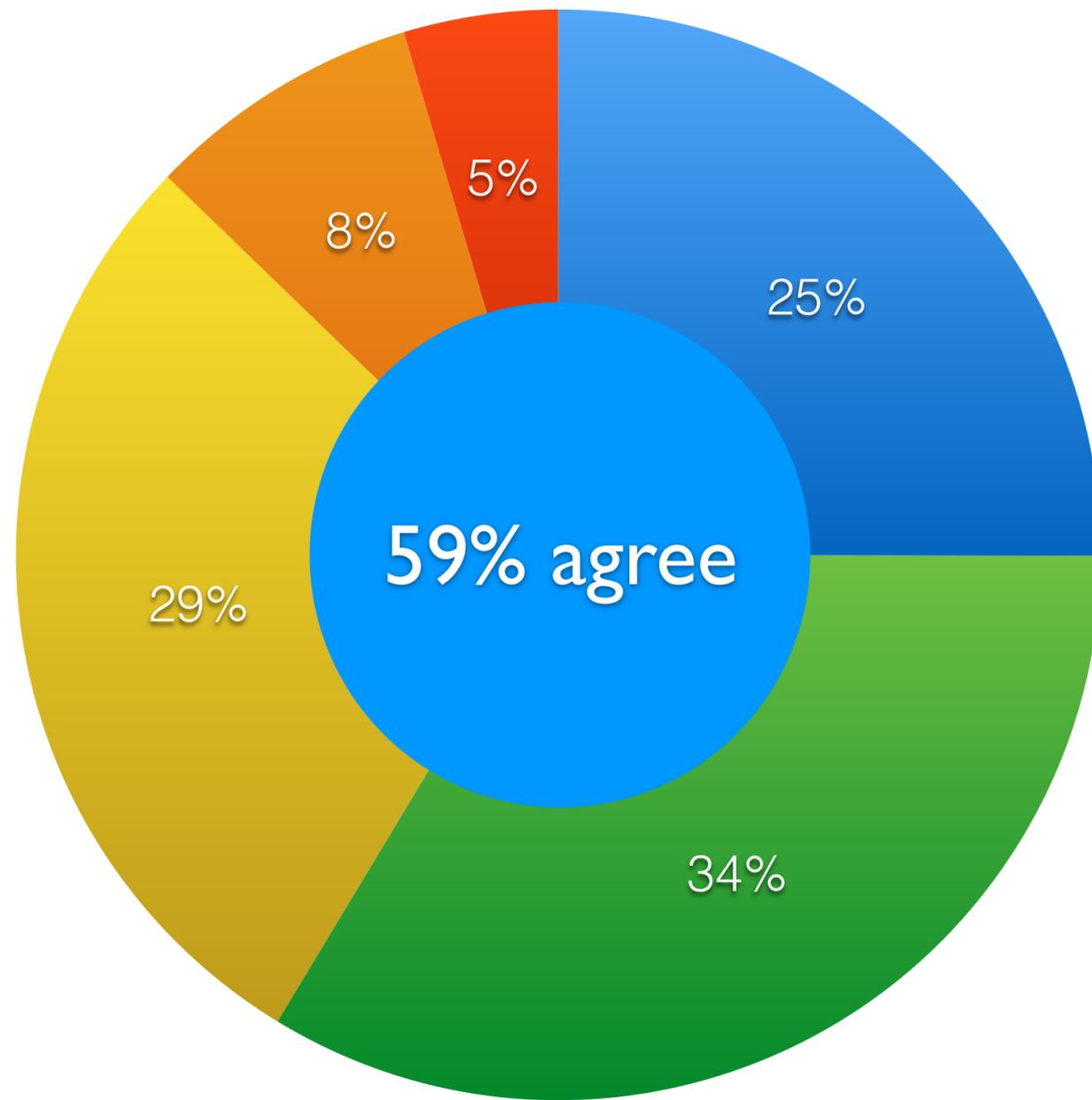
# Reading Frequency: Digital Book



GQ4B\_2: How often do you do each of the following? (Base: 1140)



# Reading Attitudes: I Share Favorite Books



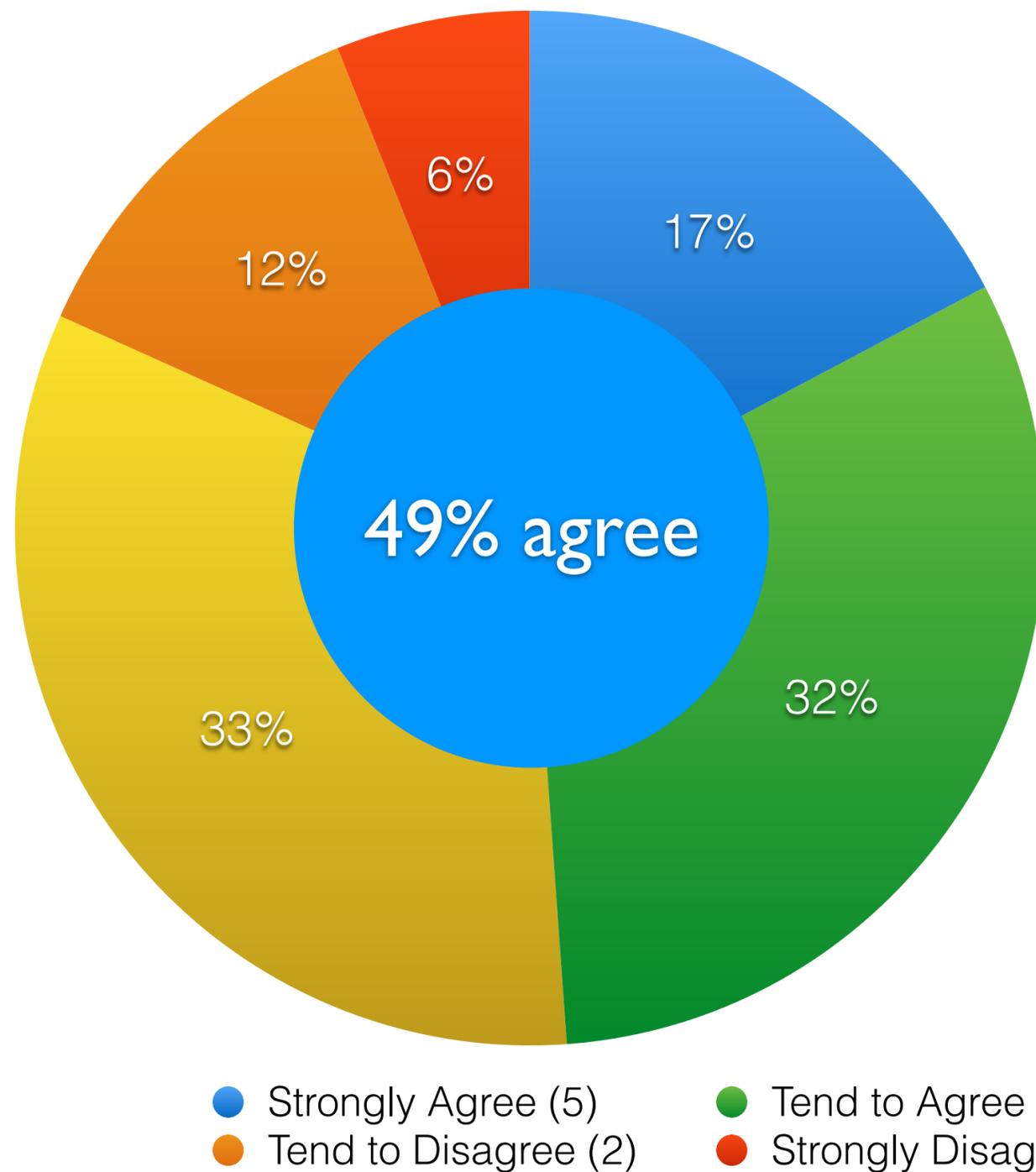
5-10 year olds, especially (62%)

- Strongly Agree (5)
- Tend to Agree (4)
- Neither Agree Nor Disagree (3)
- Tend to Disagree (2)
- Strongly Disagree (1)

GQ3\_5: When I've read a book that I really enjoy I always talk to my friends about it. (Base: 1140)



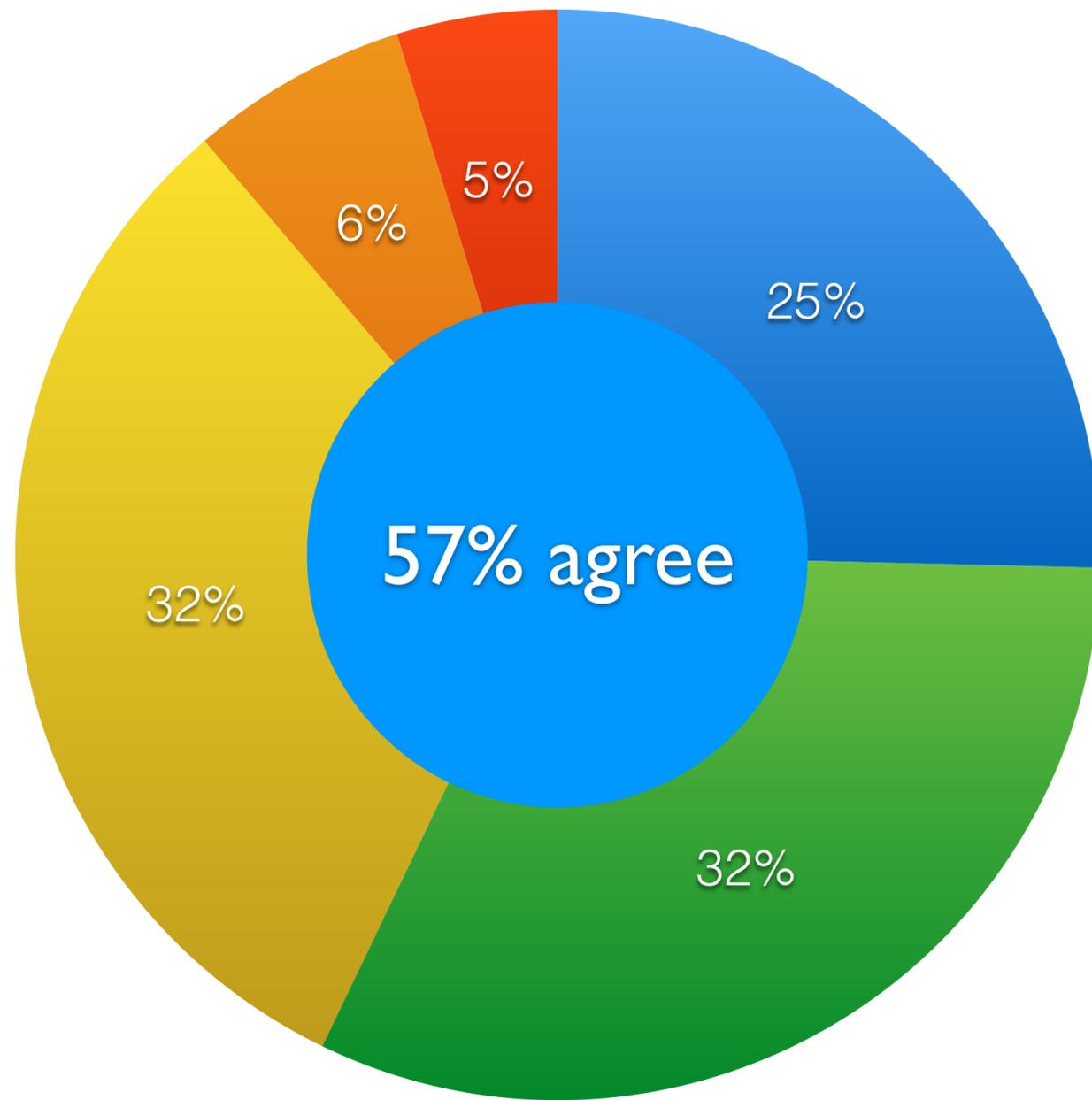
# Reading Attitudes: I Find New Books From Friends



5-10 year olds, especially (51%)



# Reading Attitudes: Gotta Read 'Em All



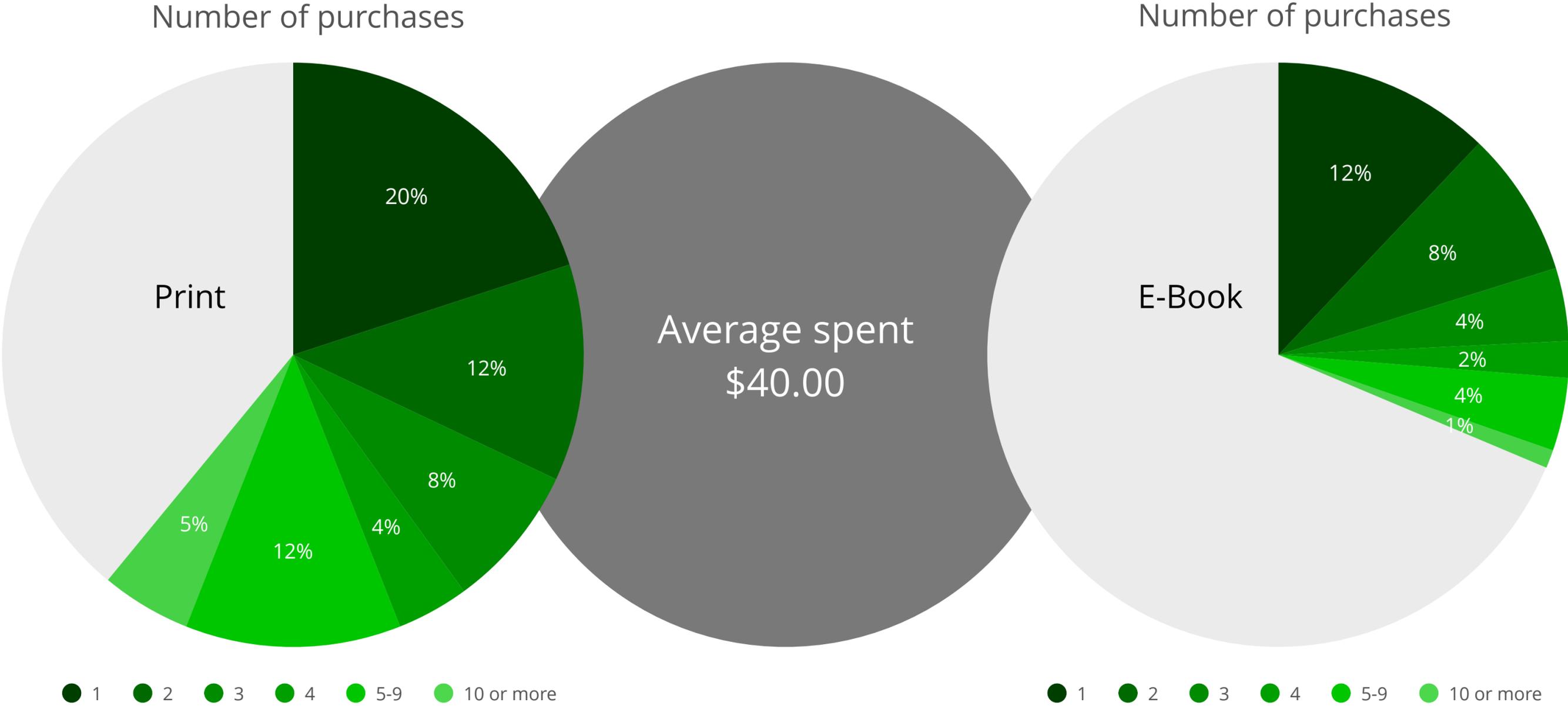
8-15 year olds, especially (61%)

- Strongly Agree (5)
- Tend to Agree (4)
- Neither Agree Nor Disagree (3)
- Tend to Disagree (2)
- Strongly Disagree (1)

GQ3\_4: When I like a particular writer/author I want to read all of their books. (Base: 1140)



# Purchases in the last 3 months: Books & E-Books

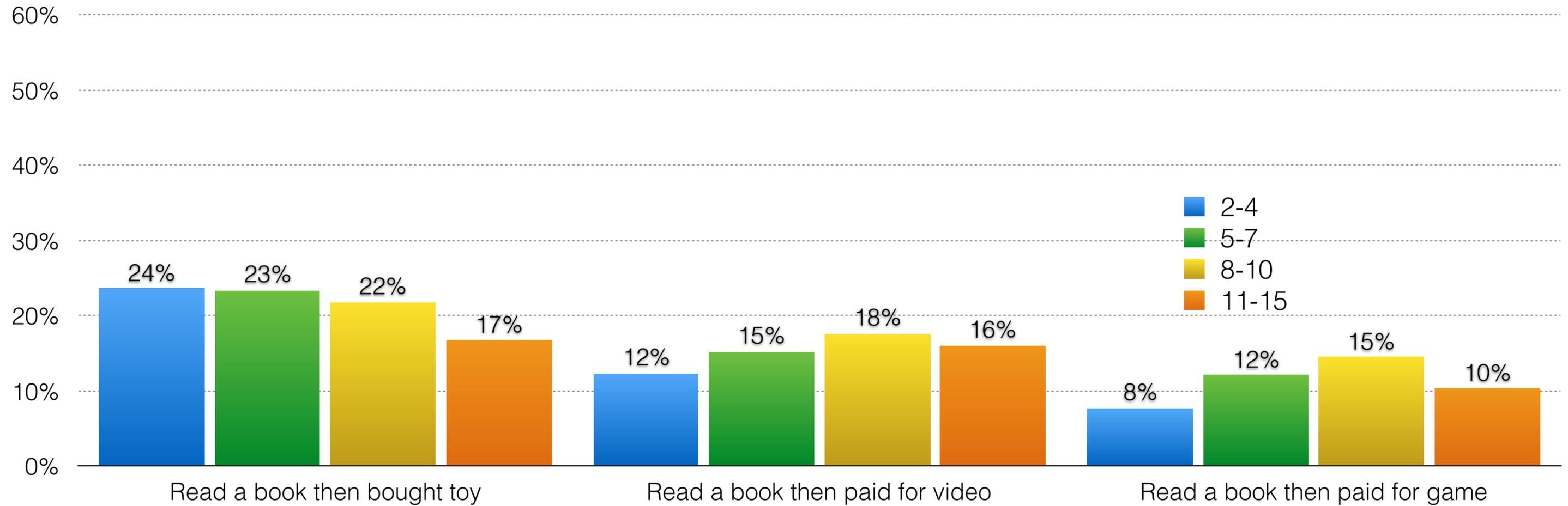


DQ2. As a parent how many purchases of the following have you made for your children over the last 3 months? (Base 1000 US)

DQ3. As a parent how much would you say you have spent on different forms of entertainment for your children in the last 3 months? (Base 1000 US)



# Books Spark Other Purchases...

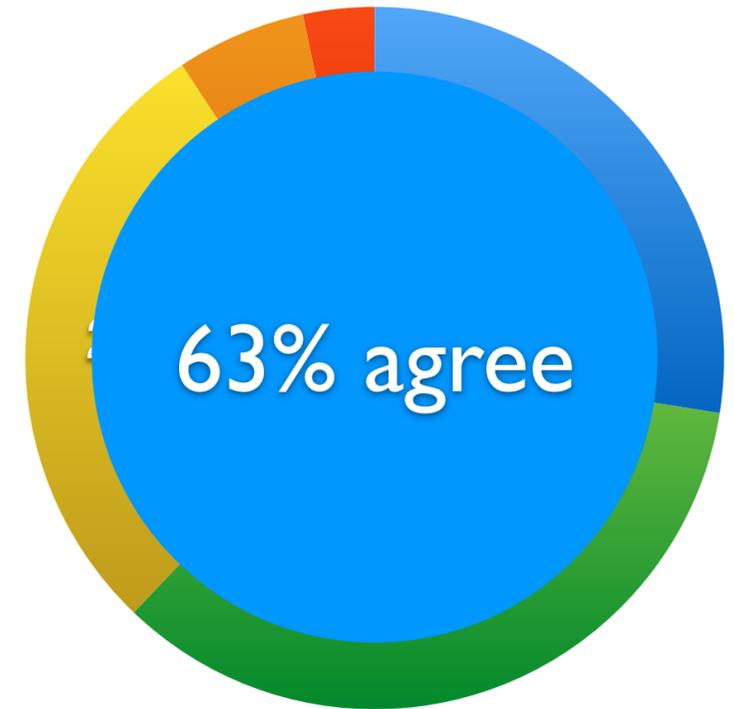


FQ7. Which of the following have you done? (Base 100 US)

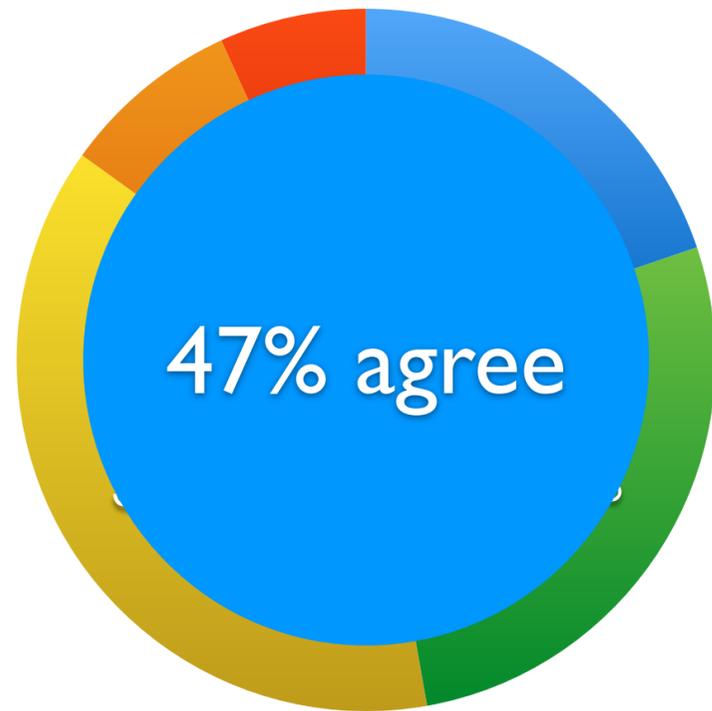


# ...and Support Other Screens

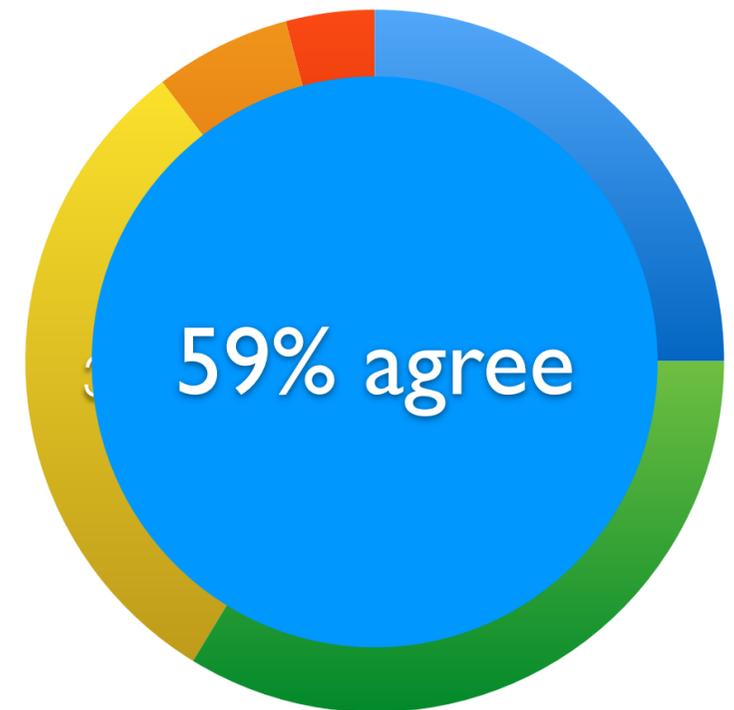
I like seeing favorite books on screens...



...but I prefer reading the book first...



...because books are the best storytellers



- Strongly Agree (5)
- Neither Agree Nor Disagree (3)
- Strongly Disagree (1)
- Tend to Agree (4)
- Tend to Disagree (2)



*Kids Still Crave  
Good Stories &  
Start With Books*



# Conclusions

## Books remain central and powerful in kids' lives

- For gratifying kids' need and desire for compelling narrative
- For everyday engagement
- For what kids want to share with their friends
- For connecting kids to other platforms and products

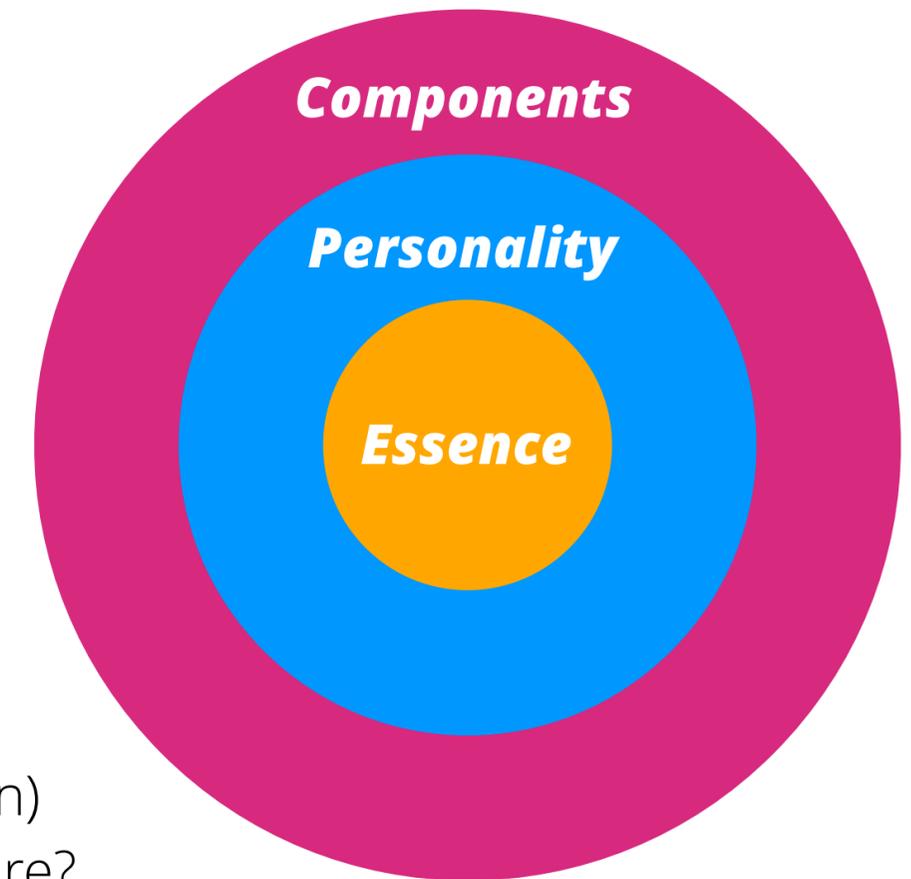
## But as kids focus on the tablet, books risk being "squeezed out."

- Books stand alone as a "platform" (for discovery, purchase and consumption)
- How can we connect kids back to digital from the book, to discover and share?

## Rather than ebooks *per se*, build platform extensions with *elements* of the print story world

- What defines my story as a reading experience?
- What is the *essence* of my story - the elements that can't change, regardless of platform?
- What components can be changed, updated or eliminated.

## Dubit Heritage Conversion Model





David Kleeman  
SVP Global Trends

[david.kleeman@dubitlimited.com](mailto:david.kleeman@dubitlimited.com)

Office: +1.312.371.4921

Early Digital Literacy: [techandplay.org](http://techandplay.org)

Dubit Trends: [adam.woodgate@dubitlimited.com](mailto:adam.woodgate@dubitlimited.com)

Dubit Limited | The Half Roundhouse | Wellington Road | Leeds | LS12 1DR | UK

