

THE MORE THINGS CHANGE...

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TRT INTERNATIONAL CHILDREN'S MEDIA CONFERENCE 2019



DUBIT GROUP
KIDS, YOUTH AND FAMILY AGENCY

- 19 countries
 - US, UK twice-yearly
- 16,000 kids/parents
- Available by subscription



WE FOCUS ON CHANGE, BUT...

I very frequently get the question: what's going to change in the next 10 years?

I almost never get asked what's not going to change in the next 10 years? And I submit to you that second question is actually more important.



NEW CONTEXT, OLD BEHAVIORS

WHAT DO YOU SEE HERE



NEW CONTEXT, OLD BEHAVIORS

GOTTA CATCH 'EM ALL...



NEW CONTEXT, OLD BEHAVIORS

WHAT DO YOU SEE HERE



NEW CONTEXT, OLD BEHAVIORS

SUCH A BOOKWORM...



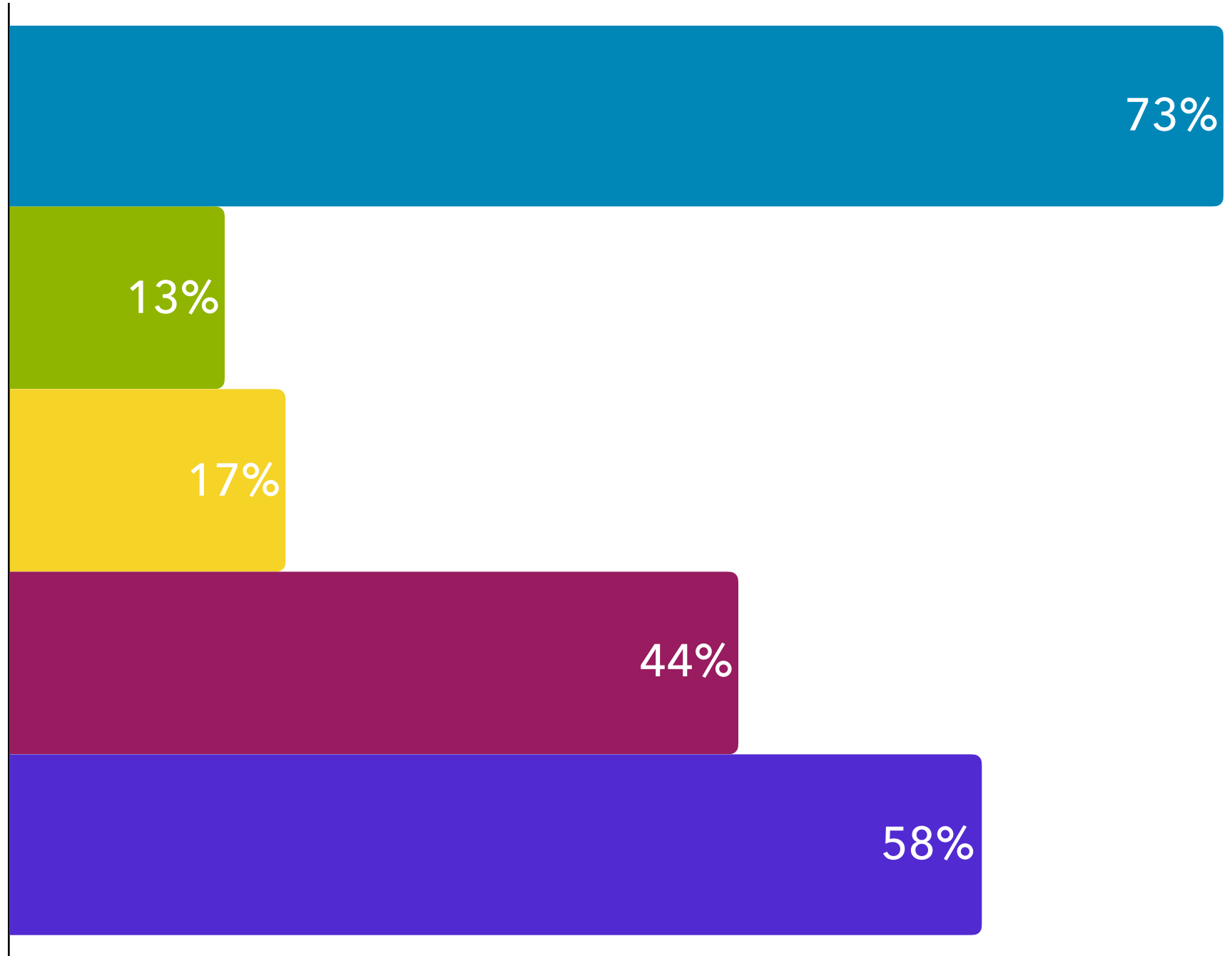
NEW DEVICES, OLD HABITS

**TURKEY'S KIDS WATCH
TV/VIDEO AND PLAY GAMES
ON TV, TABLET, PHONES**

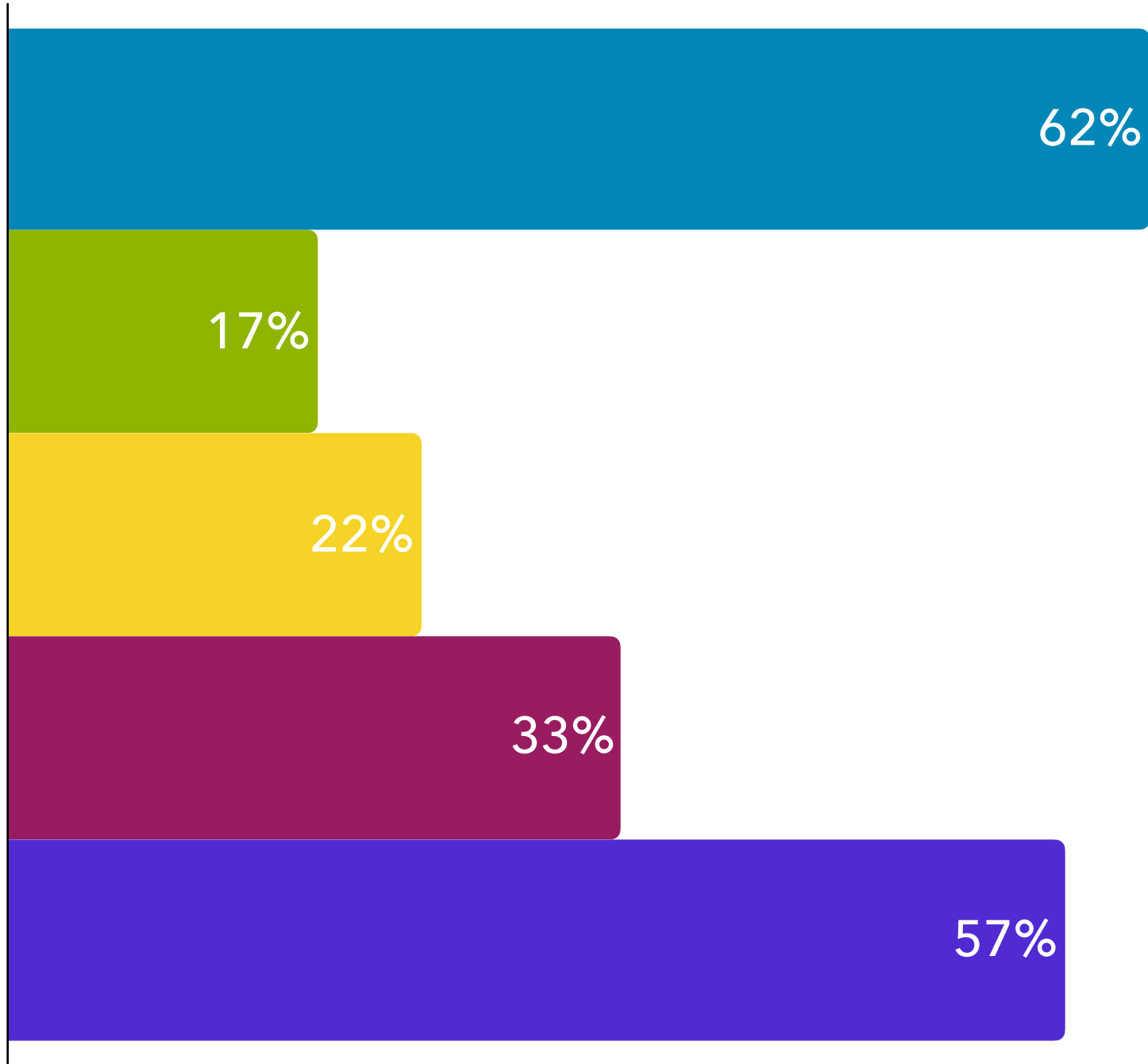
TOP 5 ACTIVITIES ON A (BIG SCREEN) TELEVISION

WATCHING LINEAR TV IS THE TOP ACTIVITY ON A TELEVISION FOLLOWED BY YOUTUBE

- Watch live/broadcast TV
- Watch subscription SVoD services
- Watch video from a service like YouTube
- Use a DVR to record and watch shows when it's convenient
- Watch free VoD services



Wave 6

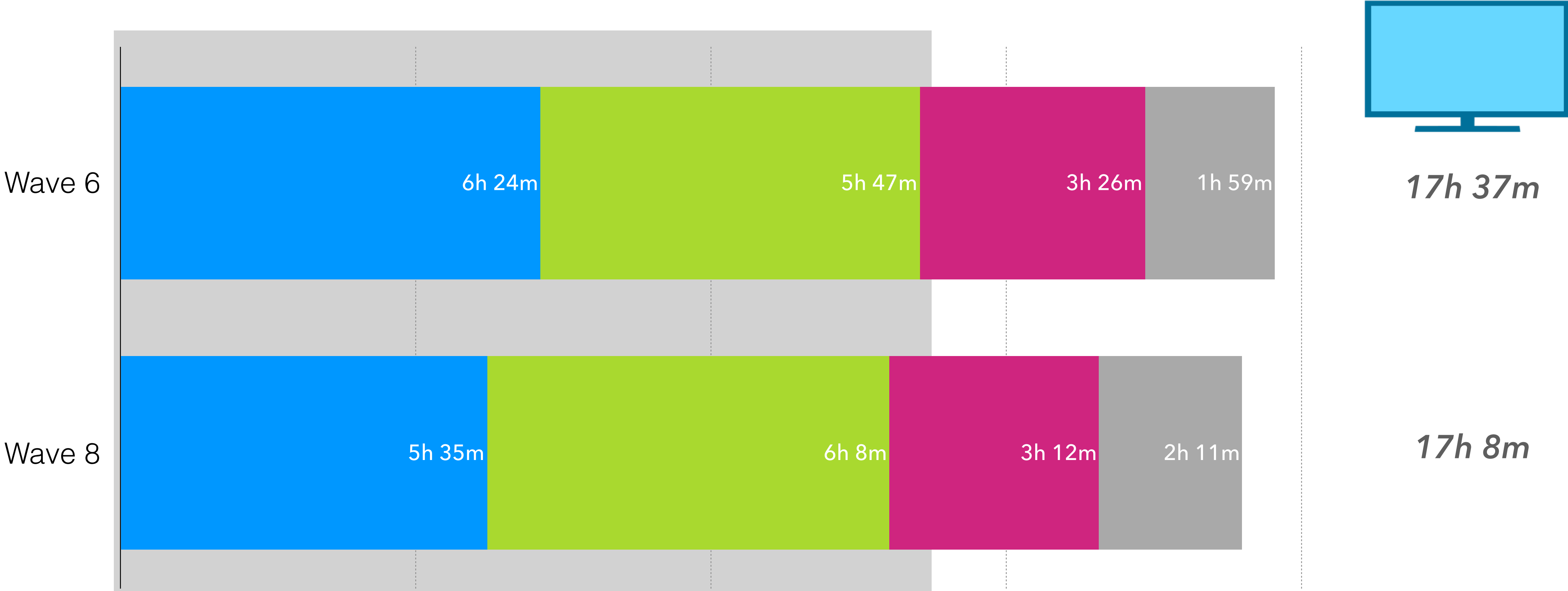


Wave 8



SHARE OF TIME ON TELEVISION - TOTAL

STREAMING VIDEO HAS OVERTAKEN LINEAR TV



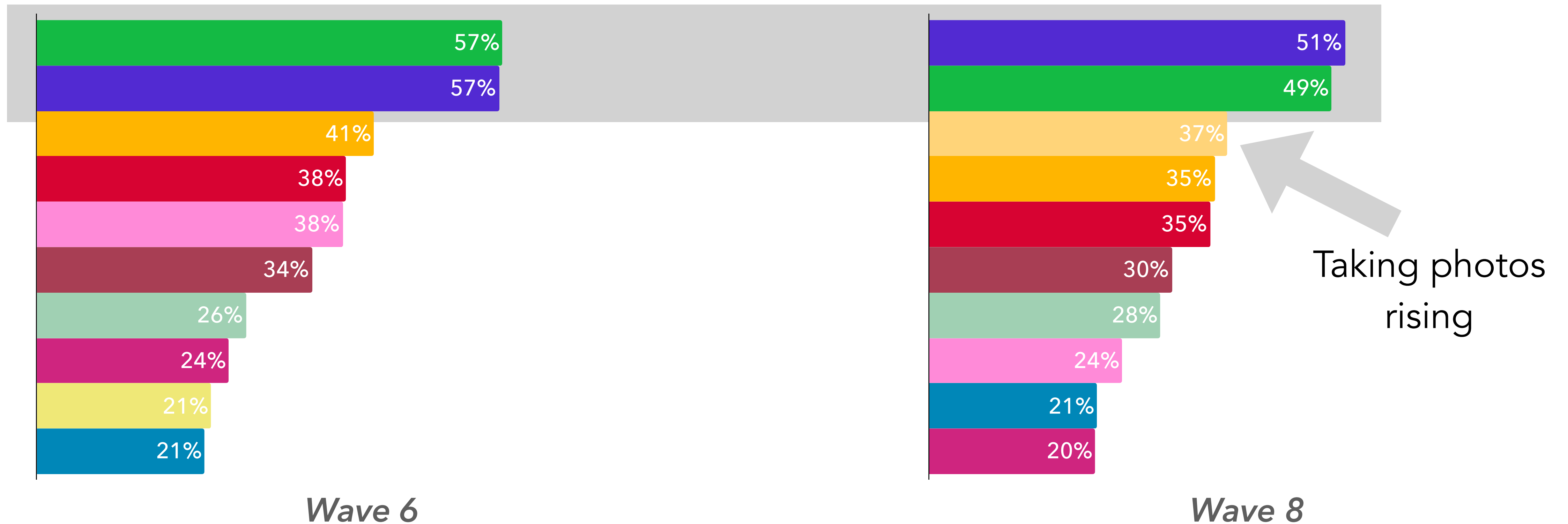
Linear TV Streaming Recorded Other (DVD, Games Console, etc)



TOP 10 ACTIVITIES ON A TABLET

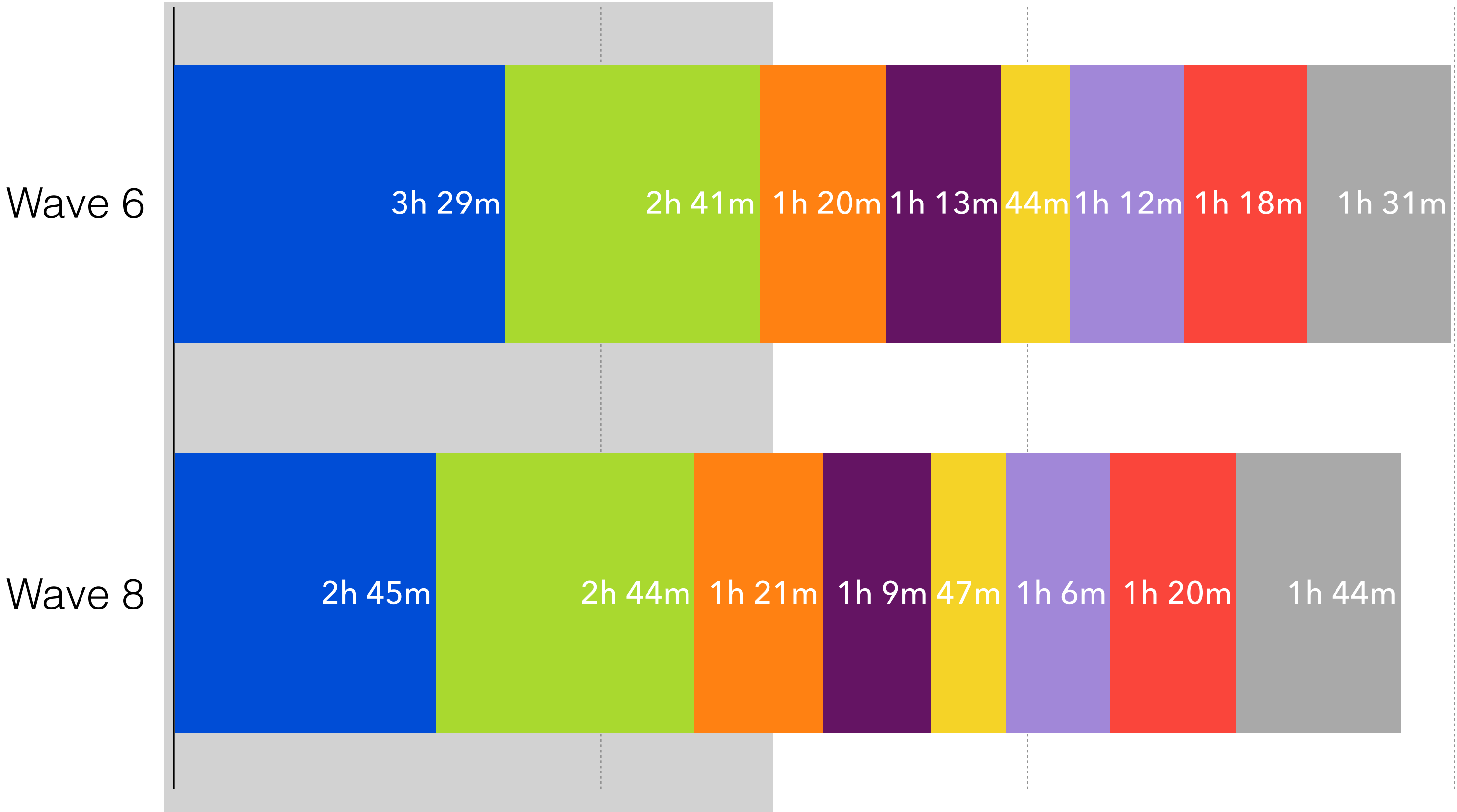
PLAYING GAMES AND WATCHING VIDEO ARE THE TOP ACTIVITIES KIDS USE A TABLET FOR

- Use apps to play games
- To browse the internet
- To stream/listen to music
- For schoolwork/homework
- For reading
- Watch other video content from a service like YouTube
- Use apps for entertainment, e.g. video and games in one app
- Use apps for education or learning
- Use apps for social interaction
- Watch live/broadcast TV
- Take photos



SHARE OF TIME ON A TABLET - TOTAL

GAMES AND VIDEO ACCOUNT FOR THE LARGEST SHARE OF TIME ON TABLETS



13h 28m

12h 59m

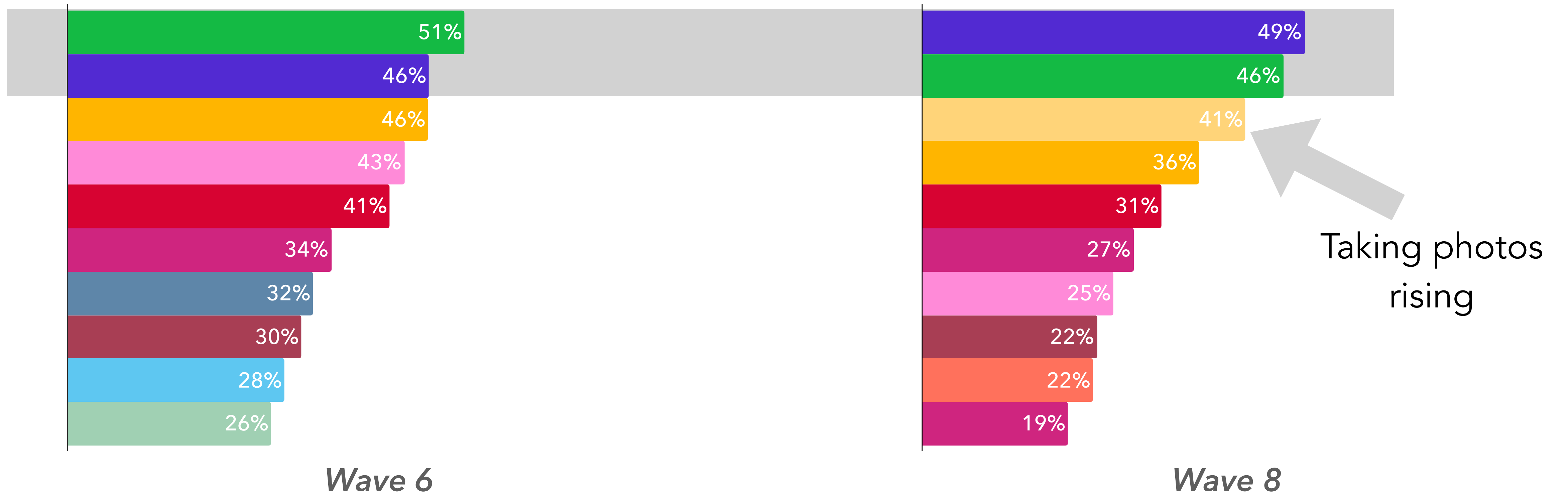
- Play games
- Watch video
- Learning/development
- Listen to music
- Reading
- Homework/studying
- Internet browsing
- Other



TOP 10 ACTIVITIES ON A SMARTPHONE

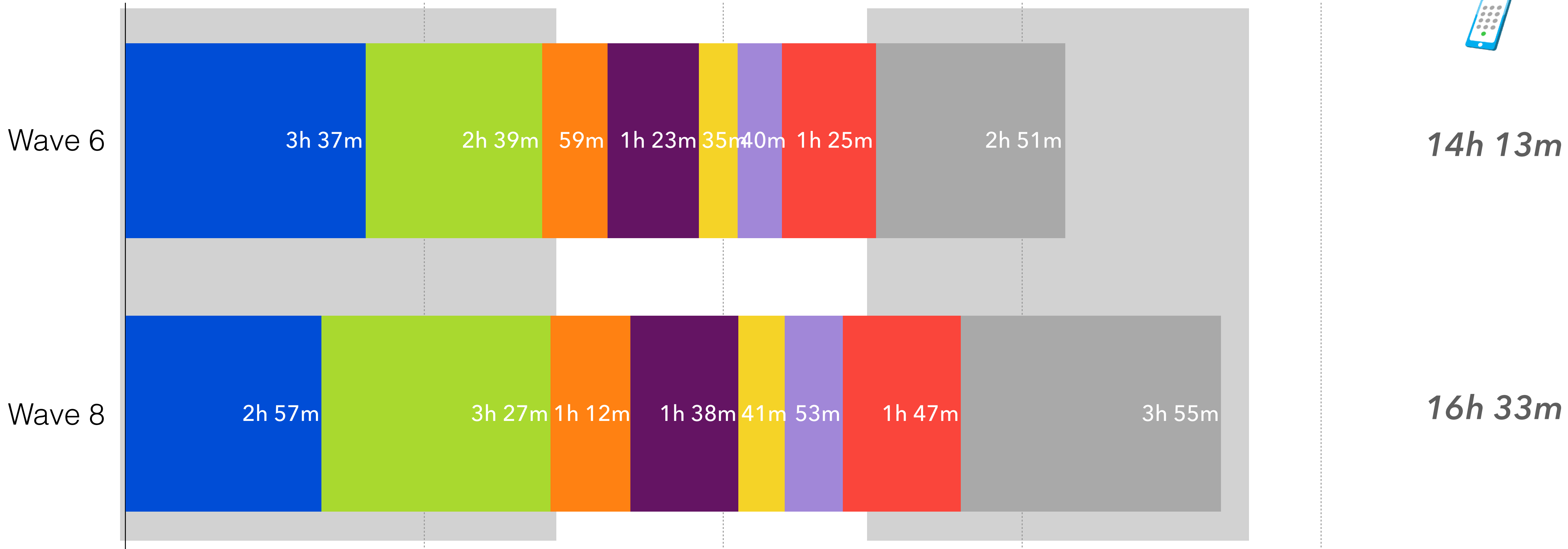
YOUTUBE, GAMES, INTERNET BROWSING AND TAKING PHOTOS ARE THE TOP ACTIVITIES

- Use apps to play games
- To browse the internet
- Use apps for entertainment, e.g. video and games in one app
- Send/receive message
- Send/receive emails
- Watch other video content from a service like YouTube
- To stream/listen to music
- Use apps for social interaction
- Use apps for education or learning
- For schoolwork/homework
- Video chat
- Take photos



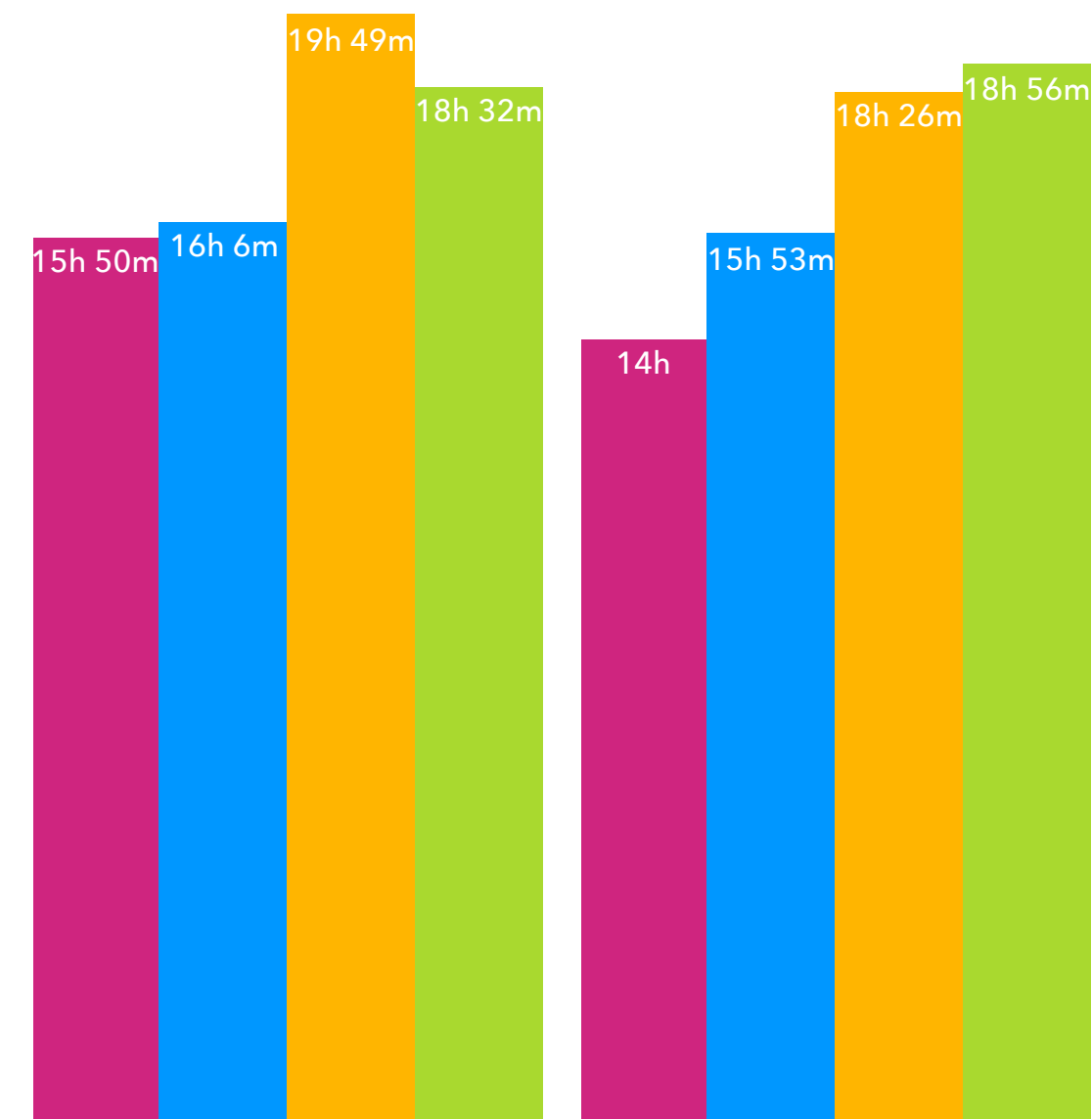
SHARE OF TIME ON A SMARTPHONE - TOTAL

VIDEO AND "OTHER" (SOCIAL/MESSAGING) COMMAND THE HIGHEST SHARE OF TIME



AVERAGE TIME PER WEEK SPENT USING SCREENS

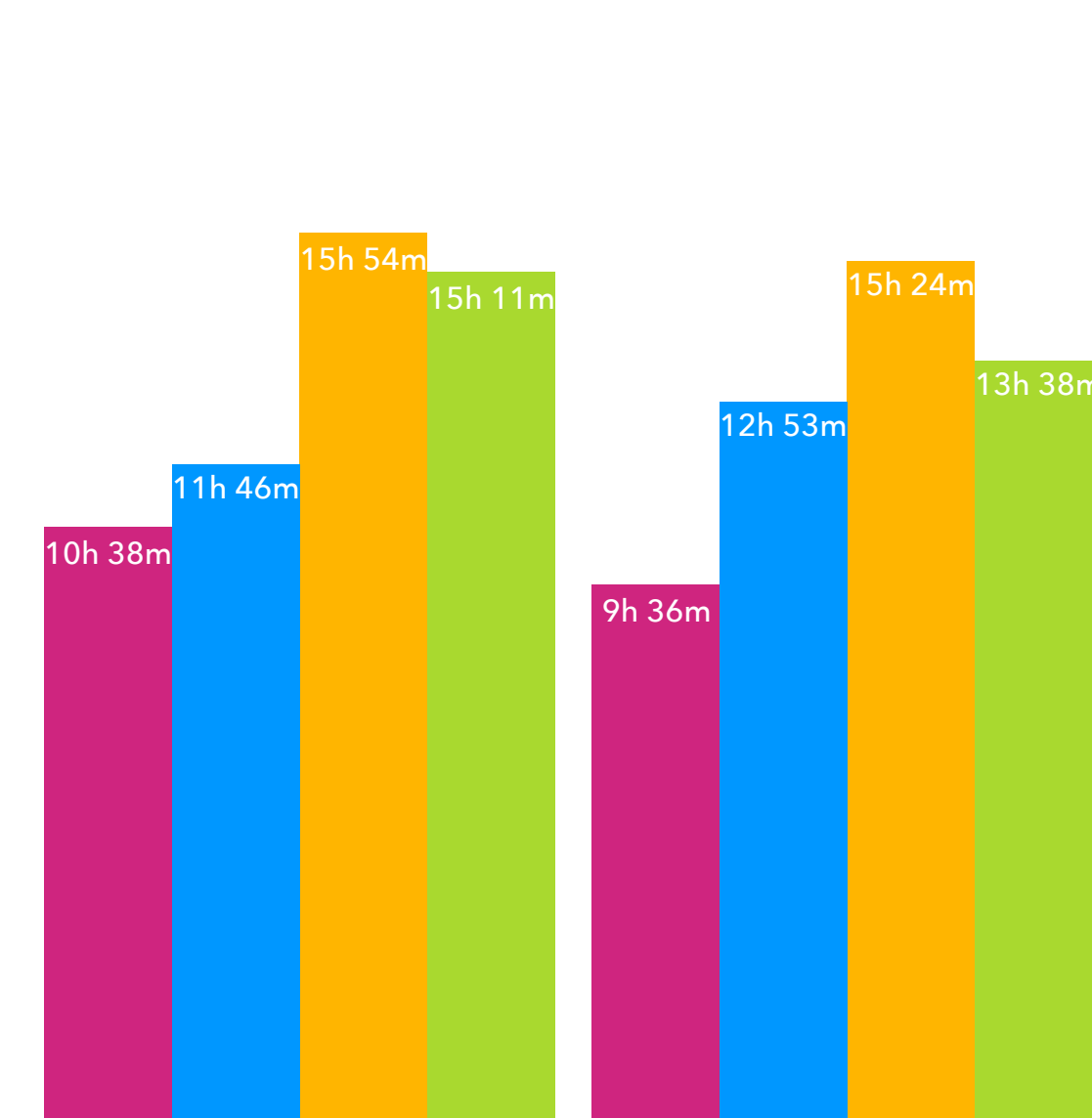
TV, SMARTPHONE TIME INCREASES WITH AGE; TABLET TIME DECLINES IN TEENAGE



Wave 6

Wave 8

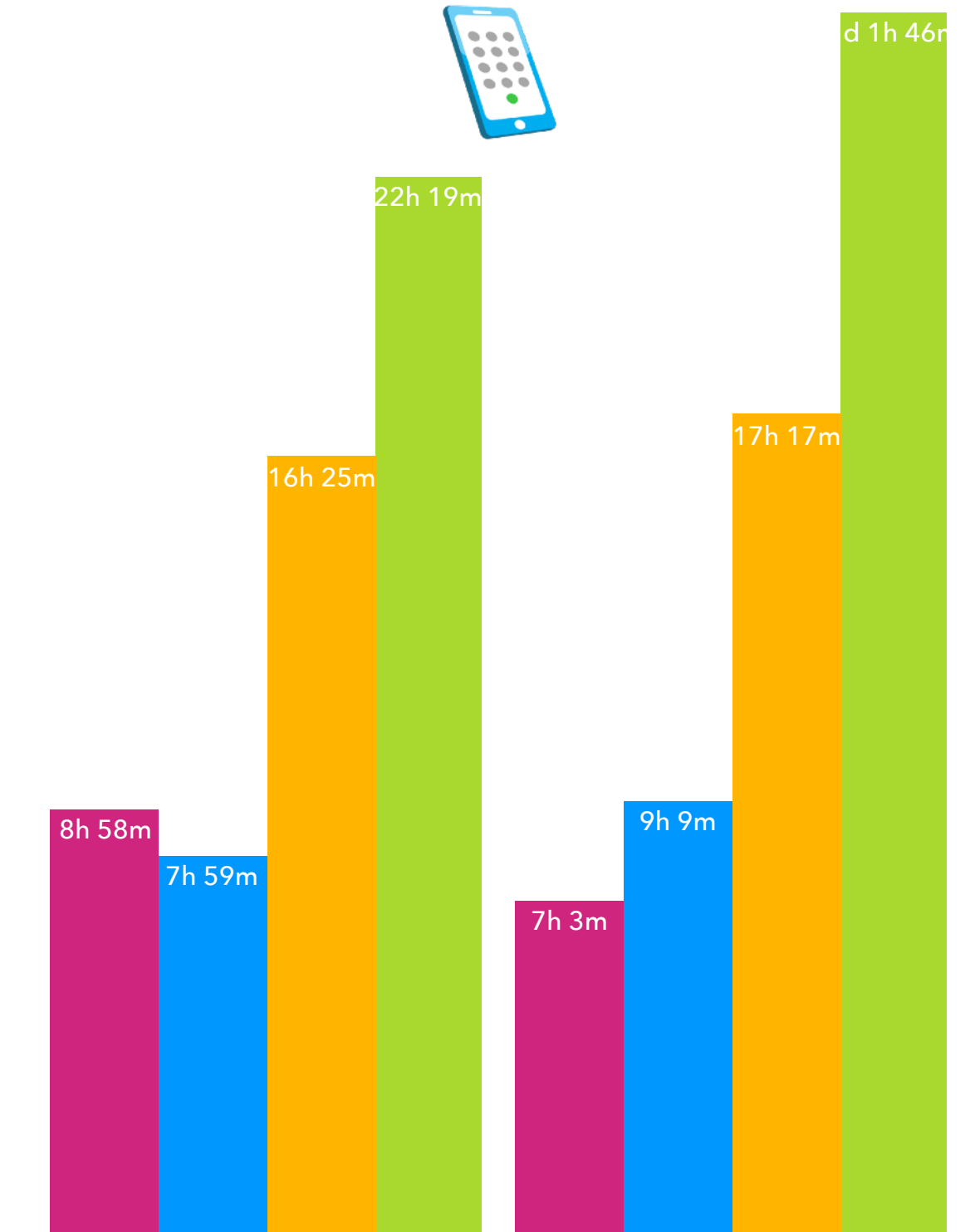
Television



Wave 6

Wave 8

Tablet



Wave 6

Wave 8

Smartphone

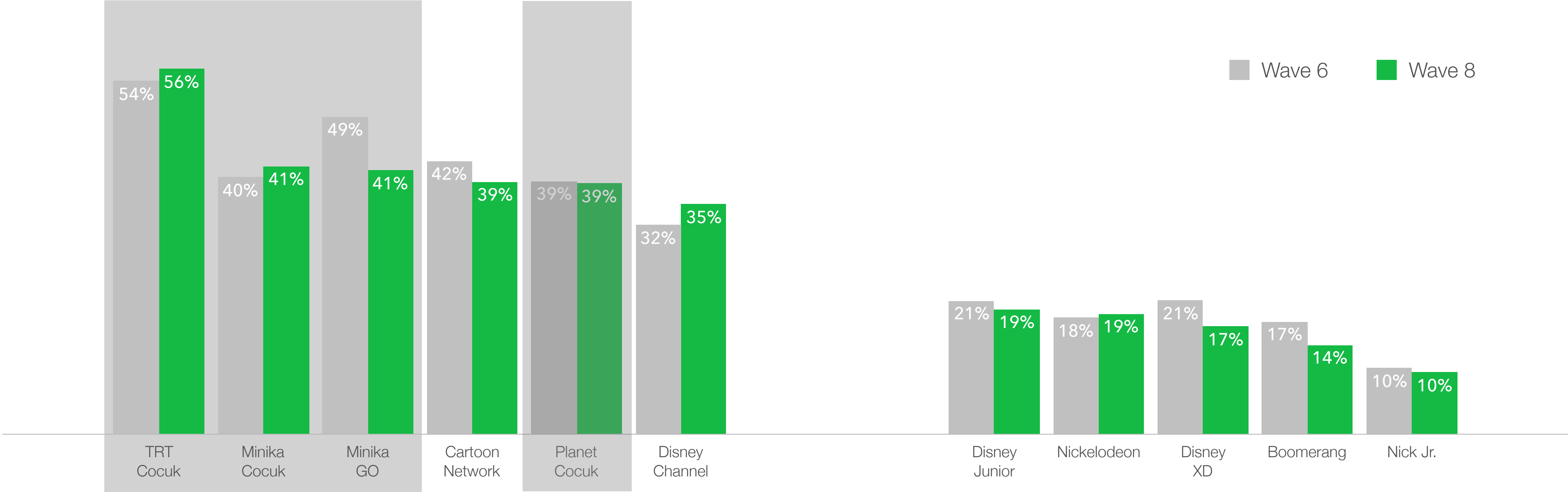


WHAT ARE THEY WATCHING

**LOCAL AND YOUTUBE
DOMINATE IN TURKEY**

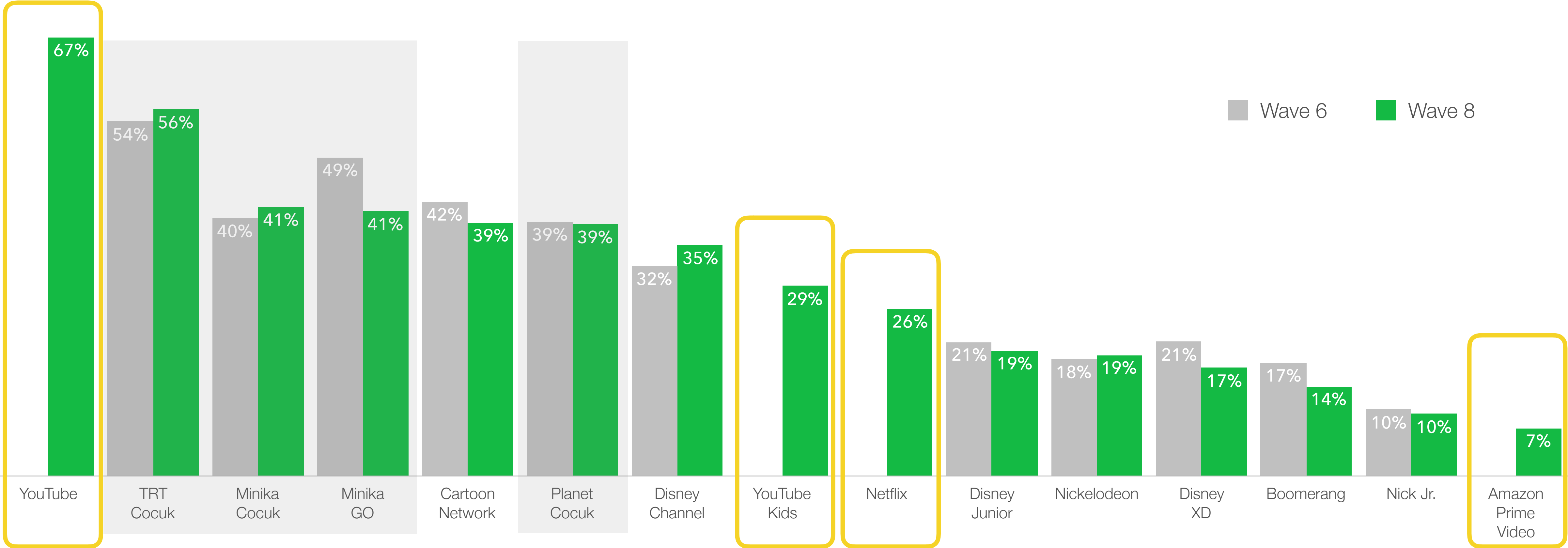
CHANNELS USED WEEKLY - REACH

LOCALLY-ORIGINATING KIDS' LINEAR CHANNELS OUTPERFORM GLOBAL BRANDS



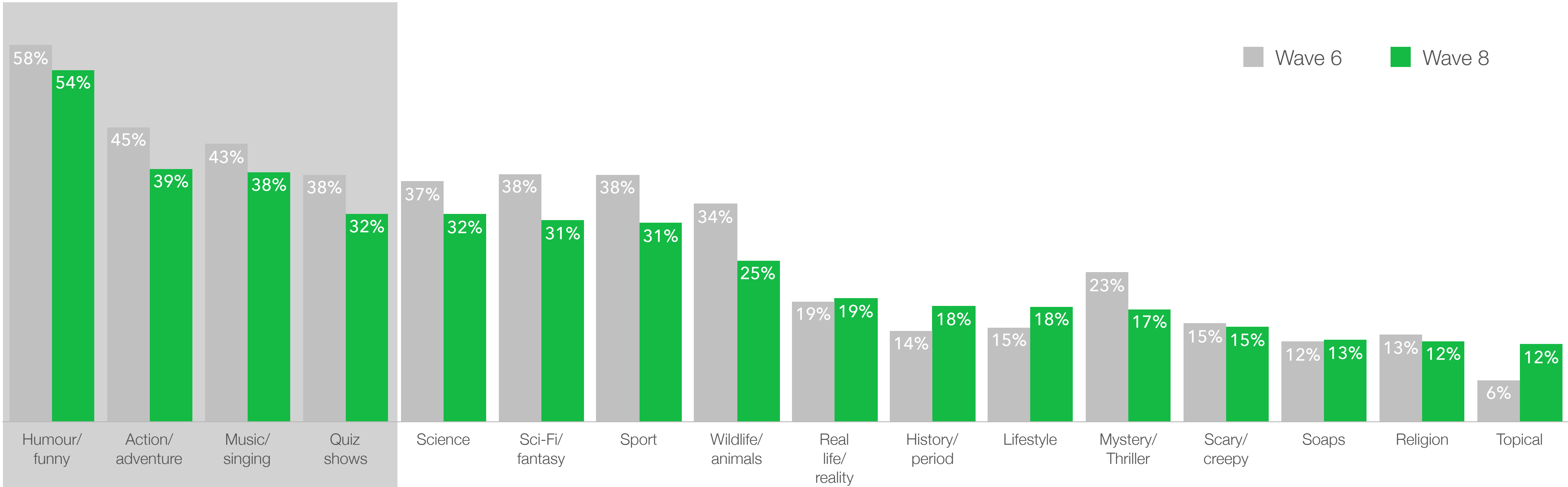
CHANNELS USED WEEKLY - REACH

YOUTUBE HAS A HIGHER WEEKLY REACH THAN ANY OF THE KIDS' LINEAR TV CHANNELS



MOST POPULAR ENTERTAINMENT GENRES

HUMOUR, ACTION/ADVENTURE AND MUSIC ARE THE MOST POPULAR GENRES



MOST POPULAR TV SHOWS - TOTAL

LOCALLY-PRODUCED SERIES AIMED AT KIDS AND FAMILIES DOMINATE

1

2

3

4

5

6

7

8

9

10

Wave 6



Wave 8



CONTENT, CONTENT EVERYWHERE

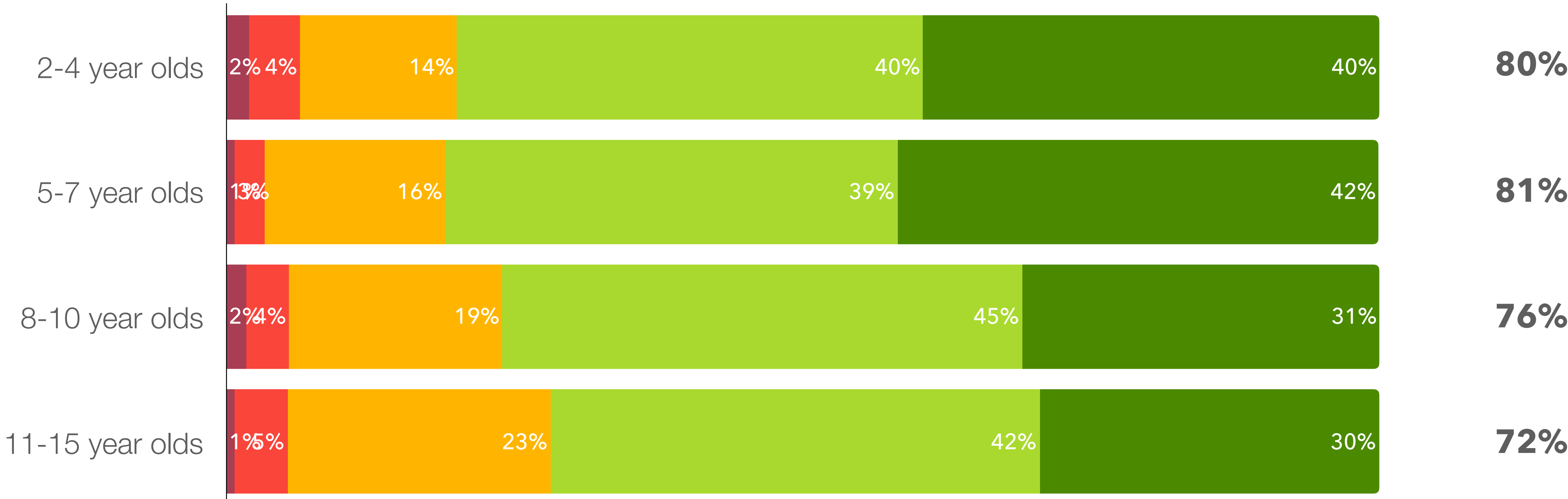
**FRUSTRATION LEADS BACK
TO THE FAMILIAR**

CONTENT, CONTENT EVERYWHERE...

MOST KIDS ARE LOOKING FOR SOMETHING NEW TO PLAY/WATCH

Very untrue Fairly untrue Neither true nor untrue Fairly true Very True

NET:
True

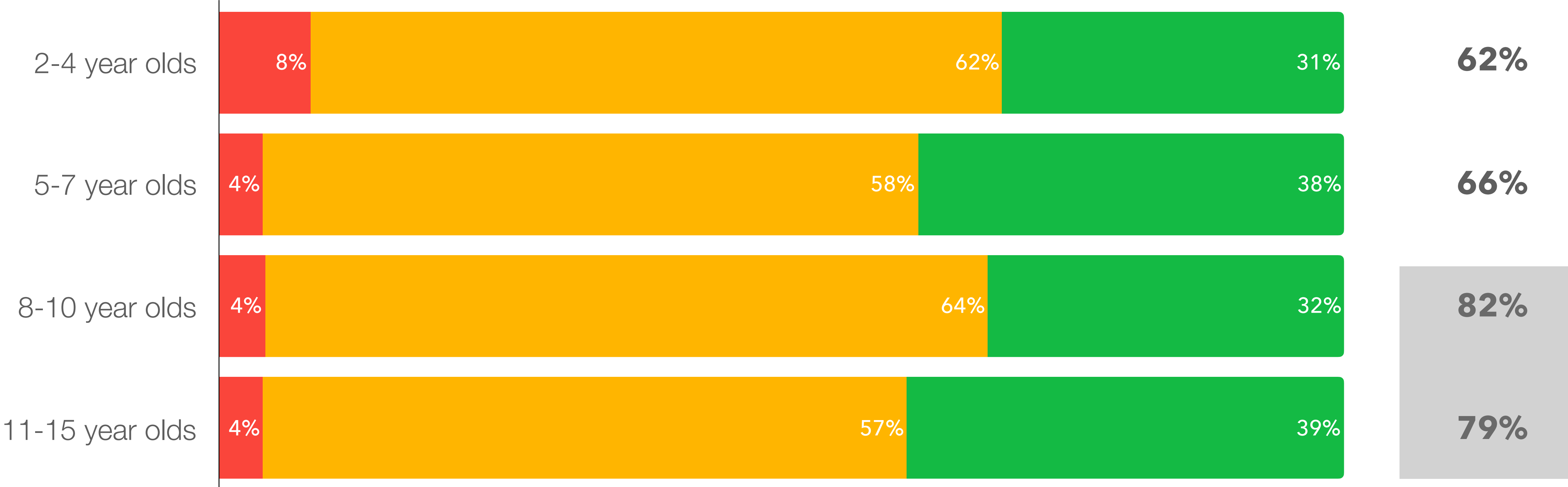


CONTENT, CONTENT EVERYWHERE...

THE MAJORITY OF KIDS STRUGGLE TO FIND SOMETHING THEY WANT TO WATCH OR PLAY

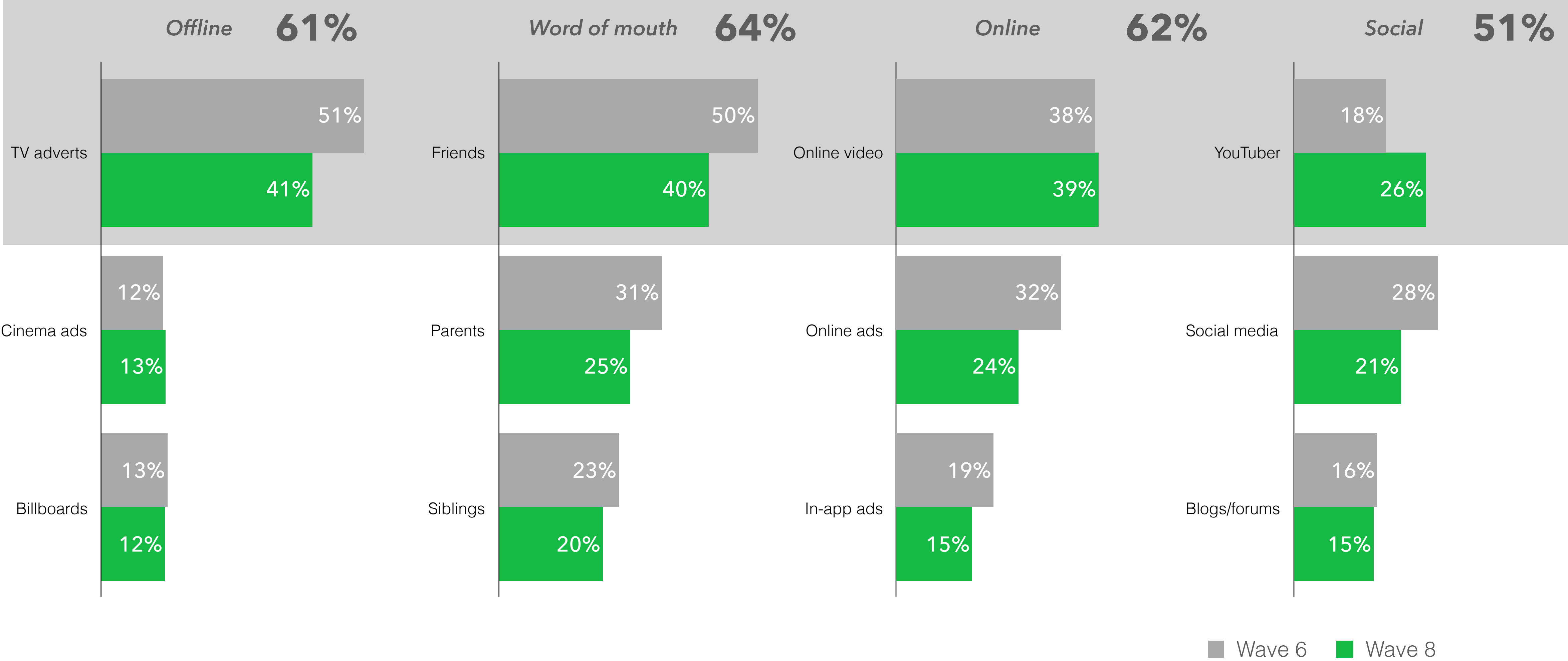
Often Sometimes Never

NET:
Get frustrated



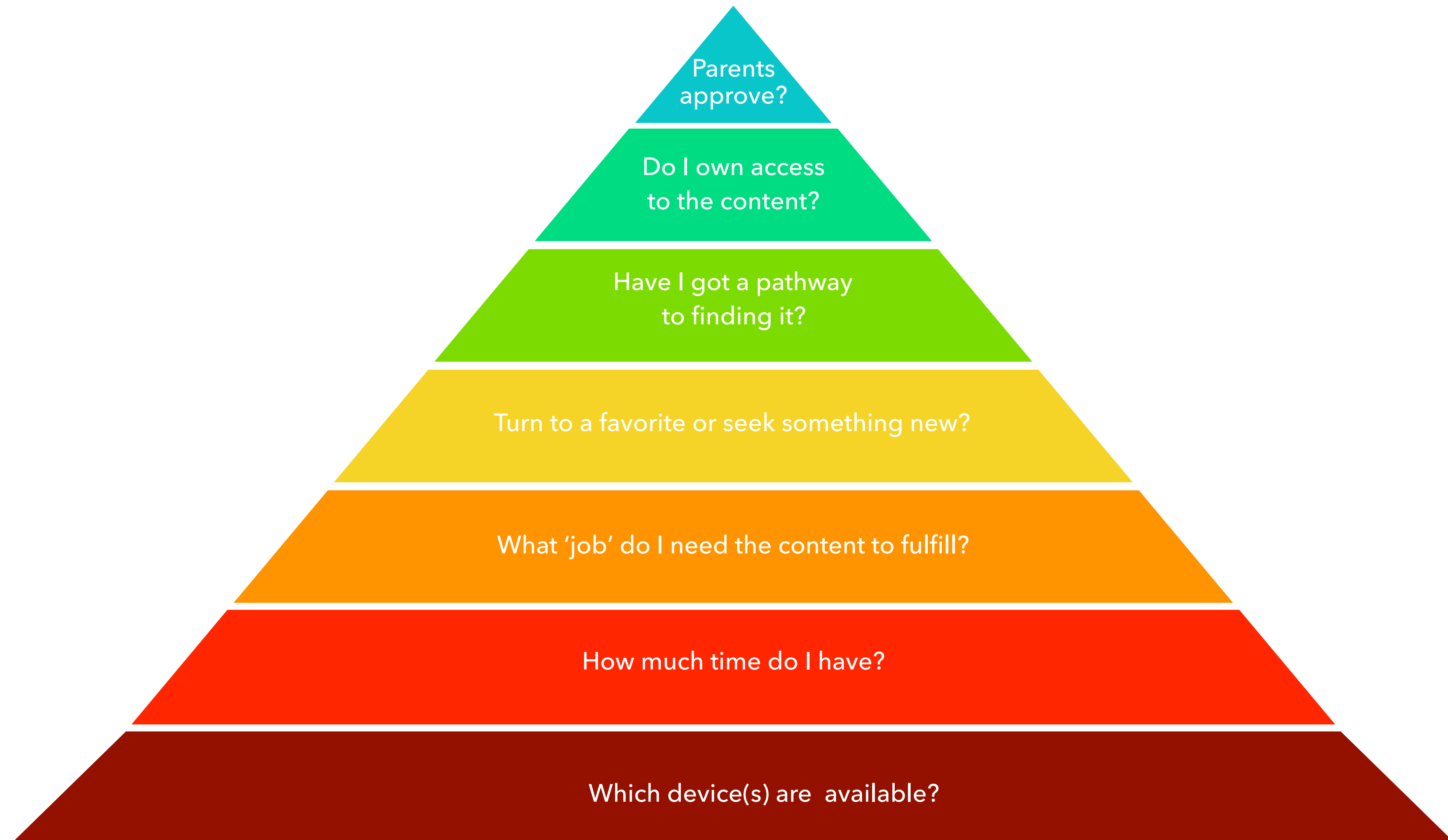
CONTENT, CONTENT EVERYWHERE...

TV, FRIENDS AND YOUTUBE ARE KEY TO KIDS HEARING ABOUT NEW CONTENT



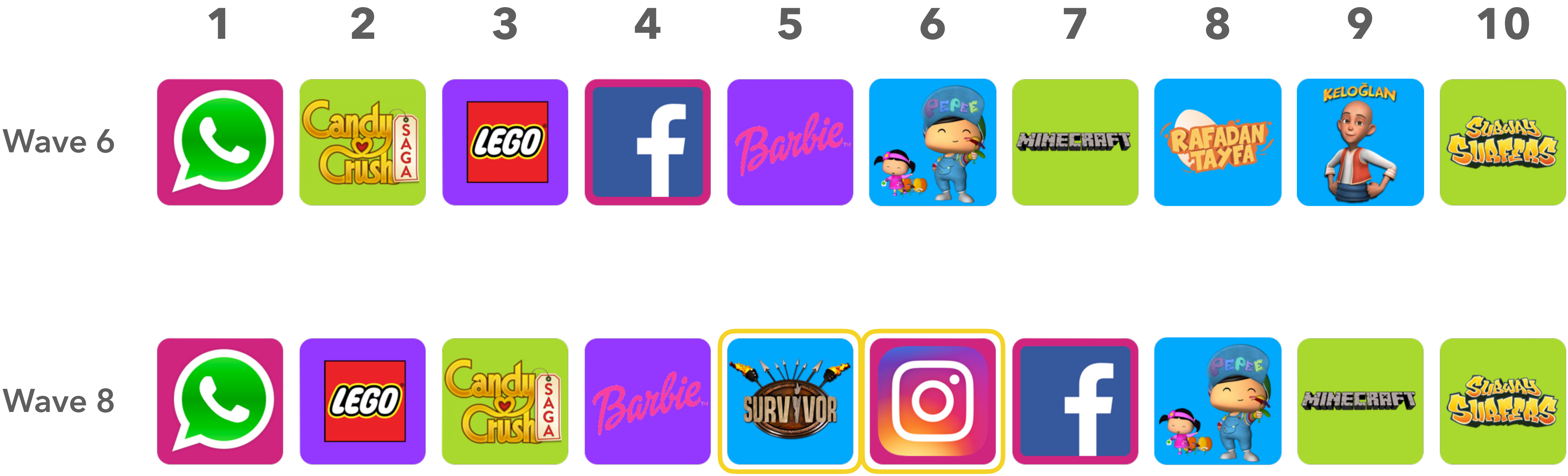
WITH APOLOGIES TO MASLOW

KIDS' HIERARCHY OF MEDIA CHOICE



MOST POPULAR BRANDS ACROSS PLATFORMS - TOTAL

ONLY TWO NEW PROPERTIES MAKE THE LIST OF TOP 10 BRANDS



■ Television
 ■ Online media
 ■ Social
 ■ Film
 ■ Toys
 ■ Book
 ■ Print
 ■ Consumer brand



THE MORE THINGS CHANGE...

CONCLUSIONS

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CONCLUSIONS

- Design for classic behaviors and needs, not trends
- Consider how kids discover their next favorite thing
 - *Do this from earliest creative development*
 - *Be easy to understand, describe and share*
 - *Keep your classics “fresh”: when kids can’t find something new, they come back to old favorites*
- Streamers can never be is “local” (YouTubers can)



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