



MAKING SCREEN TIME FAMILY TIME

How kids today influence co-viewing and purchase intent in the household

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1 Overview

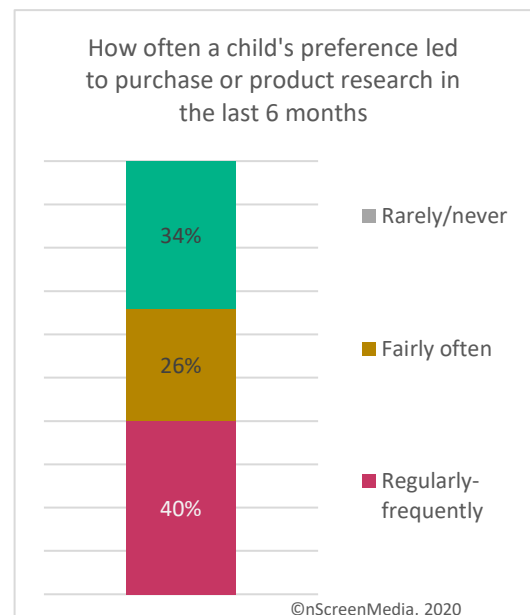
At one time, it looked like the switch to online viewing might herald the death of family viewing. Early surveys of online TV viewers showed that family members were increasingly choosing to watch alone on their smartphones, tablets, and PC. Our new survey, sponsored by [WildBrain Spark](#), shows that family watch-time and co-viewing are both still very much alive.

The most popular device for co-viewing is the television. 62% of parents say the smart TV is the most popular platform for co-viewing, with 48% using a connected TV device. However, when kids watch on their own, they are most likely to be using a mobile device. 44% of parents say their child is the primary user of a tablet, and a third say their child uses a smartphone.

Three-quarters of the parents in our survey group say they watch with their children several times a week or more. As well, the child is often in charge of the co-viewing session. Half of the parents say their child mostly chooses what they are going to watch together.

More than half of parents say their children hold significant sway in how they spend money in various product categories. For example, 70% say kids influence spending on non-TV entertainment, 62% over food delivery, and 55% over technology. Children not only influence spending but also drive purchase decisions. Two-thirds of parents say their child's preferences often led them to buy or research a product in the previous six months. 4-in-10 say such purchases and research occurred regularly or very often.

YouTube is a critical resource for parents and their children. 95% say at least one person in the family uses it, and 70% say their kids are among the users. Further, 40% say their children frequently watch YouTube on their own.



Other significant findings include:

- Two-thirds expect time spent with their kids watching TV/movies to stay the same or increase once the pandemic is over
- 6-9 AM is the most popular time for co-viewing sessions between parents and children
- Social media stars are the least trusted source for child videos
- 9-in-10 parents say free ad-supported services are an important video source for their children
- 25% of women admit to being very influenced by their children for grocery purchases versus 42% of men.

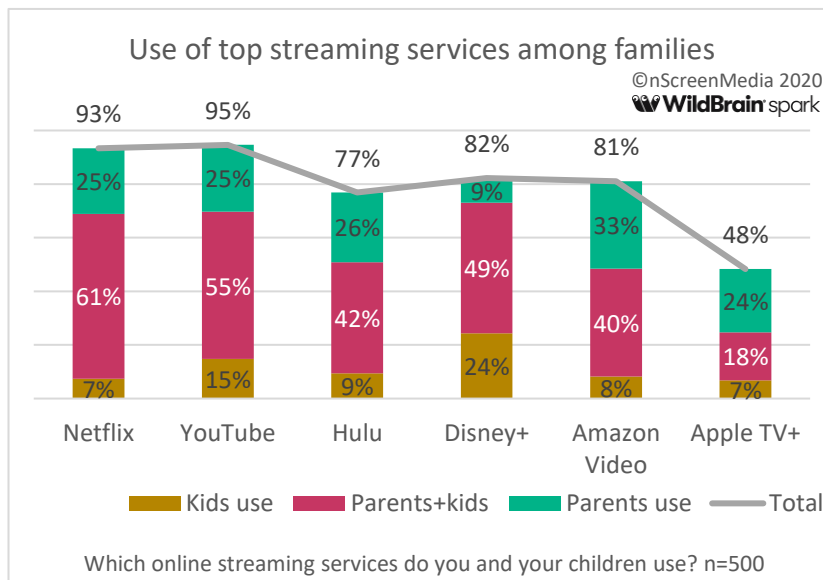
The survey of parents regarding the viewing behavior of their children was fielded to 2500 U.S. adults in the last week of October 2020, followed by an additional 500 one week later. To qualify for the survey, participants had to be weekly streamers and have at least one child below 12 years old.

2 What, how, and when kids watch

2.1 Child use of the top six streaming services

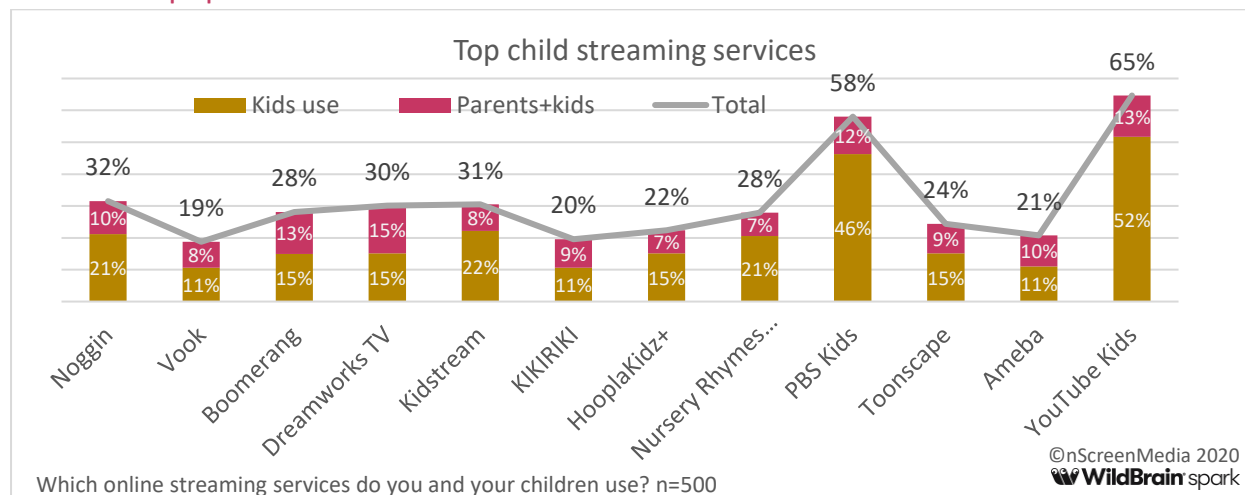
YouTube and Netflix are the two most popular services with families. 95% of parents in our survey say that at least one person in the family uses YouTube, and 93% say the same of Netflix. However, looking at child usage, a new service takes the winner's ribbon: Disney+.

It is truly remarkable how rapidly families have embraced Disney+ in the U.S. It has been barely one year since the launch of the service, but in that time, it has become a mainstay of family viewing. Almost three-quarters of the parents in our survey group report that Disney+ is used by them and their children or exclusively by their children. Half say it is used by both.



Netflix and YouTube are also popular, with 7 in 10 saying parents and children use them. Hulu and Amazon Prime Video are used by about half each, and Apple TV+ is used by a quarter. Disney is positioning Hulu as a place for adults to go for grown-up entertainment, helping to explain its poorer performance versus peers. Amazon made a push into the creation of original kid programming in 2018, so it is surprising the service does not fare better with parents.ⁱ Unlike the other services on our list, Apple TV+ is focused on originals and has yet to build out a sufficiently large number of shows to compete with the bigger libraries of its competitors.

2.2 Most popular kid services



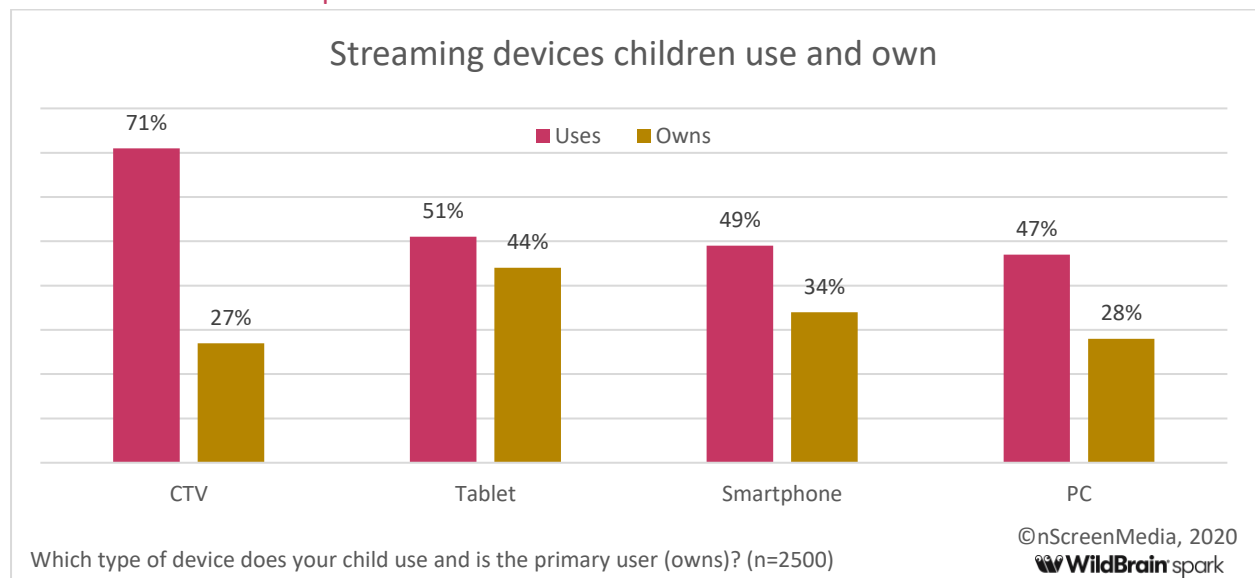
Two free children's streaming services dominate the category: YouTube Kids and PBS Kids. They are almost twice as popular as any other child's service about which we asked. Half of the parents report that their children are the exclusive users of these services.

Noggin, Dreamworks TV, Kidstream, Nursery Rhymes Club, and Boomerang are each used by around 3 in 10. Remarkably, each of the 12 services is used by 1 in 5 families or more. Parents appear to be particularly prolific consumers of streaming video services.

2.3 Devices used

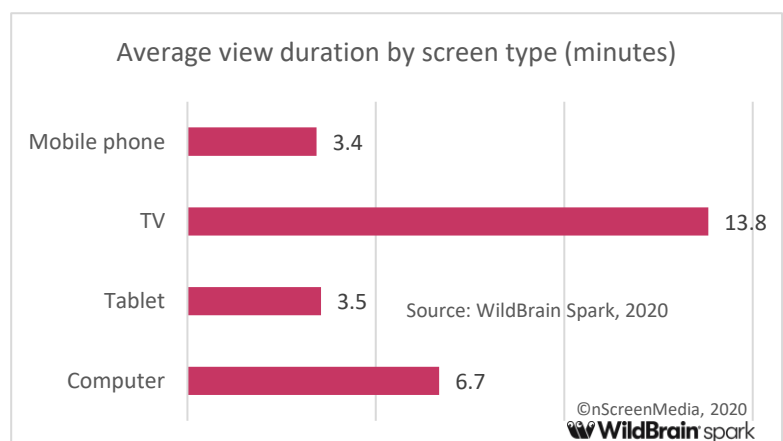
Global tablet shipments declined from a high of 230 million devices in 2014 to 144 million in 2019.^{ii,iii} Though people aren't buying nearly as many tablets as they once did, our survey shows parents are very comfortable giving them to their children to use. Perhaps this supports the idea that children inherit the outdated devices of their parents.

2.3.1 Device ownership and use



Parents are comfortable allowing their children to use all the connected screen types. Connected TVs (CTVs¹), which make monitoring and sharing what the child is watching easy, are by far the most popular screen children use. About half of parents seem happy to let their children use tablets, smartphones, and PCs.

Data from WildBrain Spark confirms that CTV looms large in kids' viewing lives.² The company looked at the 3.6 billion views and 20 billion minutes



¹ Connected TVs include smart TVs, and televisions connected to the internet by a secondary device, like a Roku stick or Xbox game console.

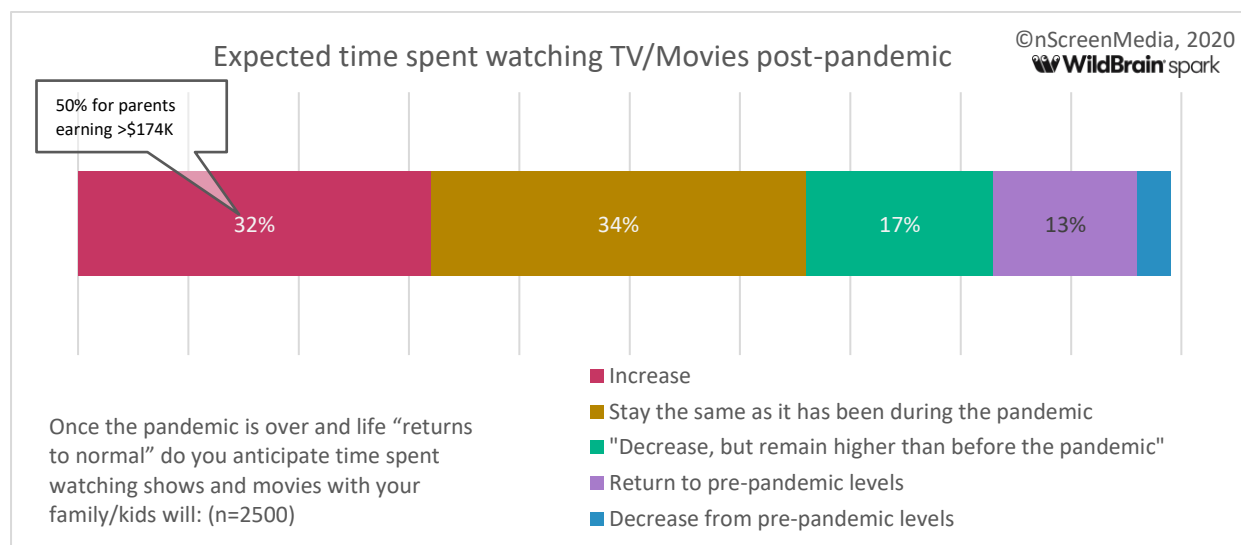
² nScreenMedia validated the WildBrain Spark data before including it in this report.

watched for all its kid videos in September 2020. The average minutes watched per view on CTV was twice as much as through the PC and four-times as much as on the smartphone or tablet.

When it comes to giving a child a device, the picture is quite different. The tablet is the go-to screen for parents, while most eschew the connected TV. The dramatic difference could reflect how kids and their parents behave with individual viewing. Placing a TV in a child's room makes their viewing invisible if the parent is in the kitchen or somewhere doing chores. If the child has a tablet (or a smartphone), the kid can watch where the parent is located, allowing them to continue to keep an eye on their usage.

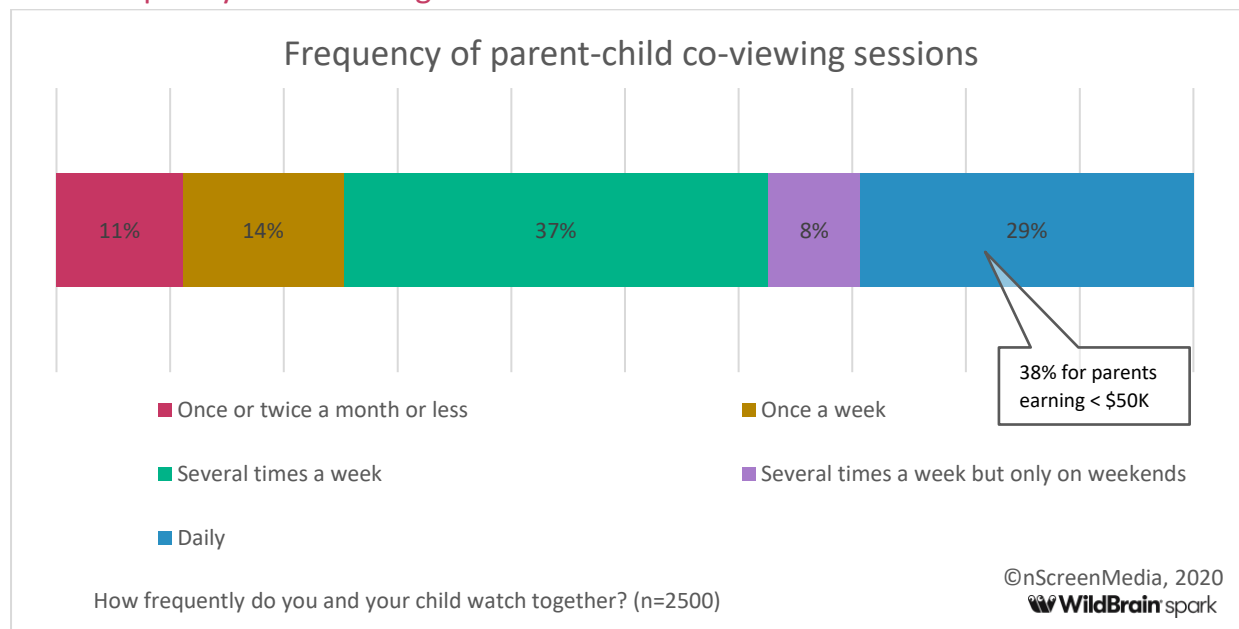
2.4 Viewing trends – more in the future

With everyone spending more time at home in 2020, it is not surprising that people have been spending more time streaming video. For example, Roku active users spent 3 hours and 50 minutes per day streaming in Q2 2020, an increase of 20% over Q2 2019.^{iv} We asked our survey group of parents how they thought their family viewing time would change after the pandemic. 83% said they thought their viewing would remain above pre-pandemic levels. Two-thirds thought it would either stay at pandemic levels or increase.



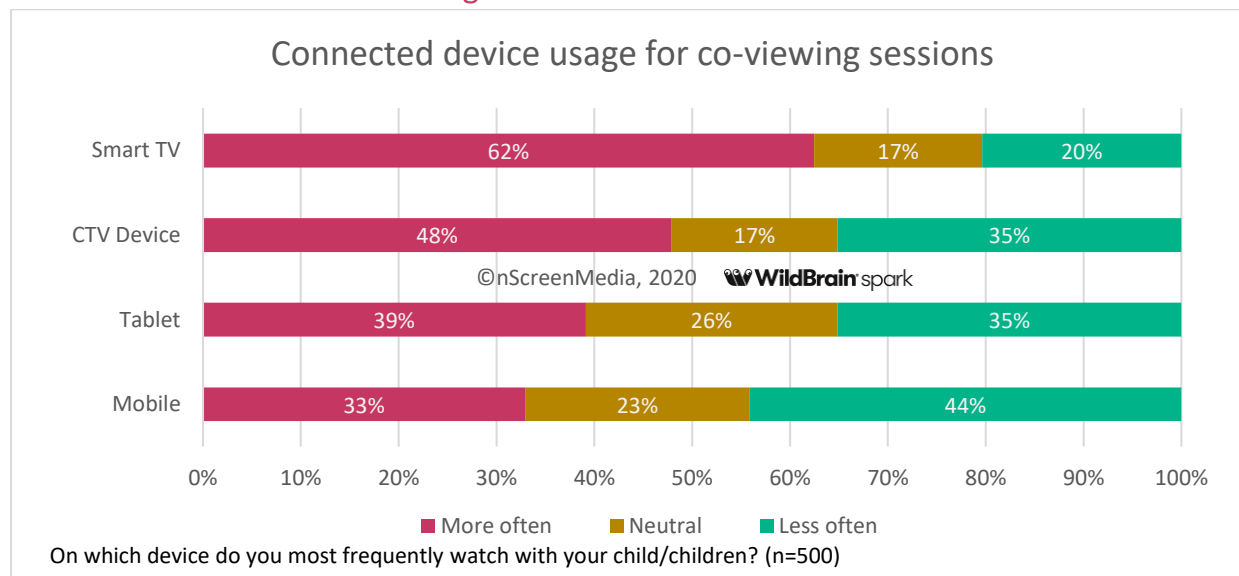
3 Co-viewing a central family activity

3.1 Frequency of co-viewing sessions



Three-quarters of the parents in our survey group say they watch with their children several times a week or more. 29% have daily co-viewing sessions with their children. As well, the child is often in charge of the co-viewing session. Half of the parents say their child mostly chooses what they are going to watch together. Only 12% of parents mostly or always choose what to watch in the co-viewing session.

3.2 Devices used for co-viewing sessions



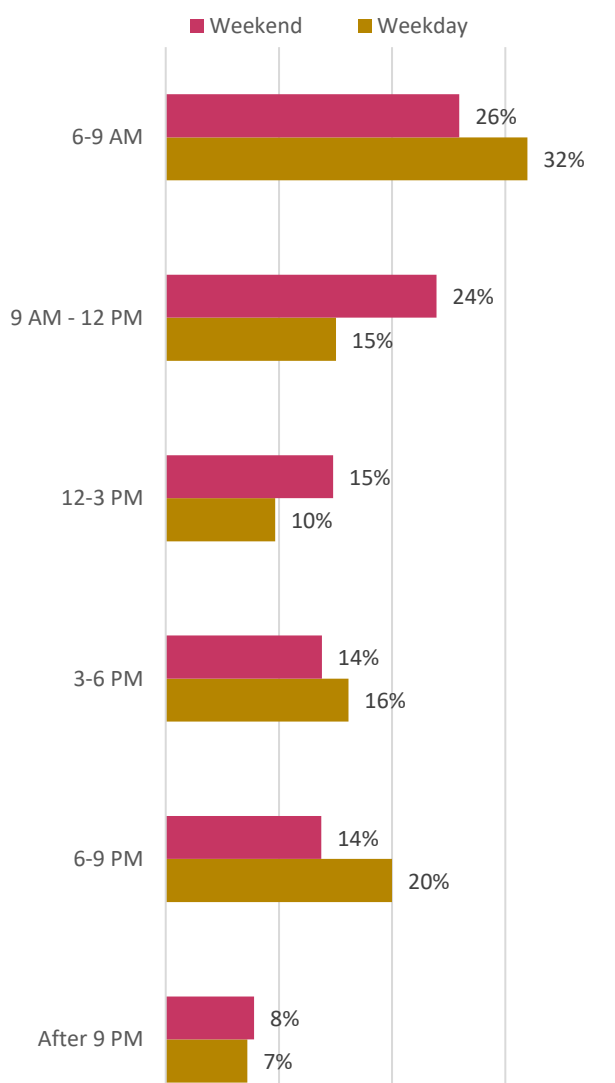
Given our previous data on the TV's popularity for a child to use but not to own, it is not surprising that the television is far and away most popular for co-viewing sessions. What is surprising is the popularity of smart TV. The penetration of connected smart TVs in U.S. TV households (58%) is only

slightly higher than connected TV devices (56%.)^y Among parents, smart TV is the most popular device for co-viewing overall and is far more popular than streaming sticks, boxes, or dongles.

3.3 When co-viewing occurs

We asked parents to rank the three most popular times during the day that they watch videos with their children. About half of parents chose the morning as their most preferred time to watch with their children.

Most popular time for parents to watch with children



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Thinking about your activity in the last week, when do you typically watch with your child/children? (n=2500)

However, when we asked for their second and third choices, times later in the day were much preferred. What is more, few parents selected the mornings as their second or third choice for co-viewing.

Rise and Shine: For a third of the parents, a popular co-viewing time, even on weekends. The other two thirds rarely watch at this time

Mid-morning break: A popular viewing time on weekends, but not so much on weekdays.

Hit the books: Lunch/after lunch is never a popular time to watch during the week. It is used more on weekends where it is a popular second or third option.

School's Out!: This time slot is selected by most parents as their second or third favourite co-viewing time.

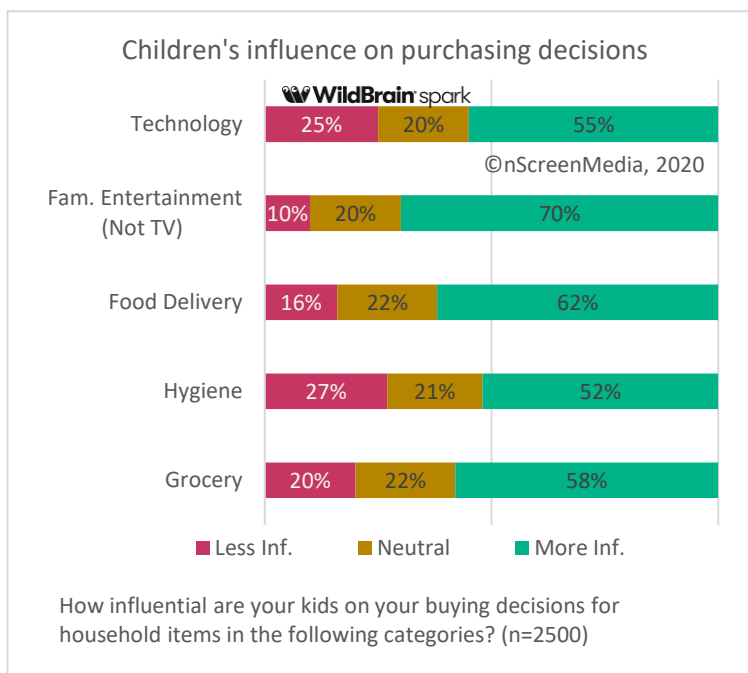
After-dinner viewing: The second most popular time to watch on weekdays. It is also used a lot on weekends.

Bedtime beckons!: Few parents selected this as their first or second choice for co-viewing with their children.

4 Children's influence on spending

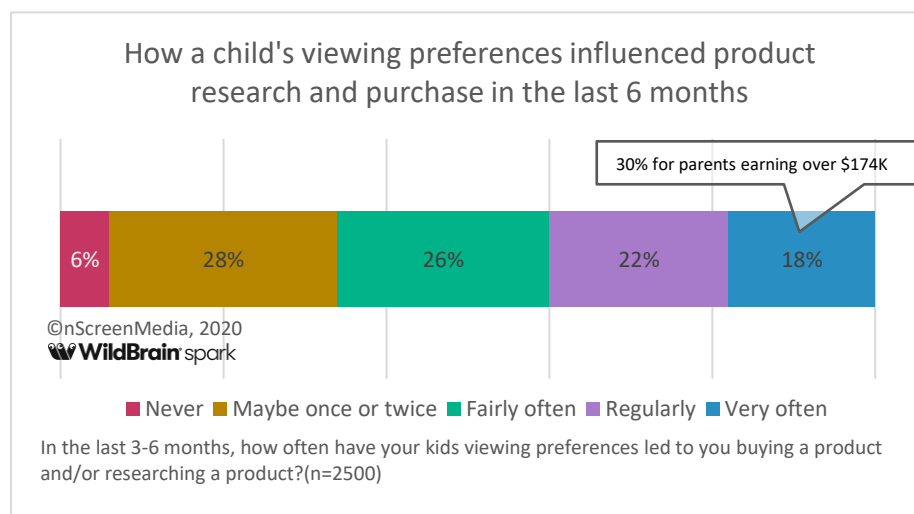
The number of successful child video services previously discussed demonstrates that children wield much influence over the video services subscribed to by their parents. But how much do children influence other areas of family spending?

Our survey data suggests that children influence family spending in many major categories. We asked the parents how influential their children are in buying decisions concerning products and services in various categories. It turns out children hold significant sway over more than half of parents in every category. We might expect much influence over non-video family entertainment (park visits, game night, for example) and food delivery (kids love pizza!) But the majority of parents report influence over technology and hygiene purchases too.



4.1 Child Influence leads to purchase decisions

The brands and characters that children see in the services and shows they use drive parents' purchases. 7-in-10 parents say they buy products or services for their children related to a favorite show or character they watch fairly often or more. 4-in-10 parents report making these purchases regularly or very often.



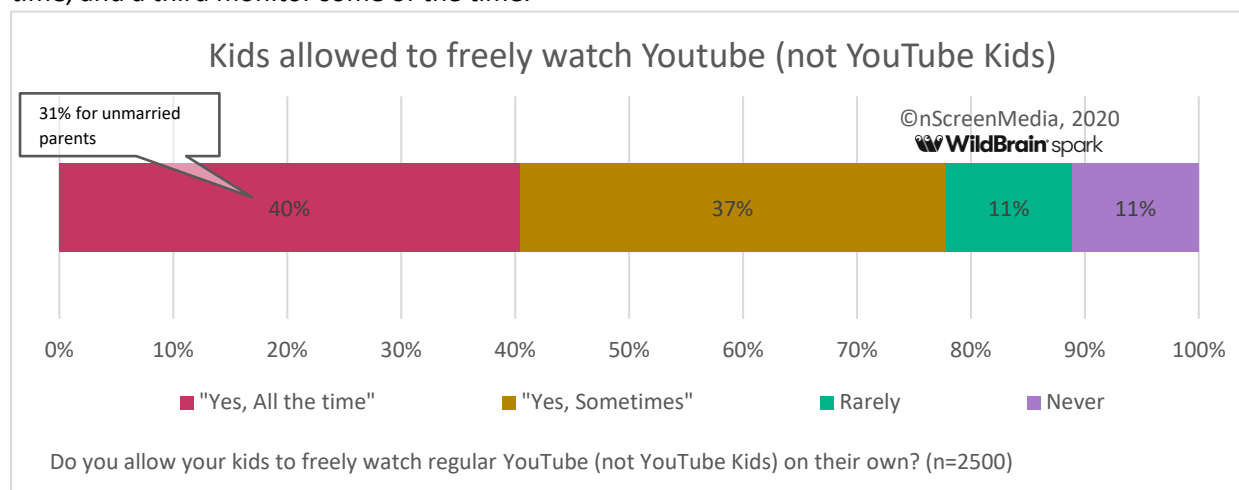
More specifically, we asked parents how often their child's preferences led them to buy or research a product in the previous 3 to 6 months. Two-thirds say such purchases occurred fairly often or more, and 4-in-10 say regularly or very often.

Unsurprisingly, income level has an impact on parents purchasing behavior. Higher-income households are more likely to buy products influenced by their children. For example, 4-in-5 parents earning \$175,000 or more say they bought or researched a product in the last six months based on their child's viewing preferences. About half of those earning less than \$50K said the same.

5 Attitudes to video sources

5.1 YouTube an essential service for parents

YouTube is the most popular video service in homes with children. 19 in 20 of our survey group say they or their children use the service. What is more, 77% say they allow their children to watch the service independently at least some of the time. However, these solo viewing sessions are not necessarily unsupervised. 61% of parents say they monitor their child's YouTube viewing all the time, and a third monitor some of the time.



How can so many parents allow their children to watch YouTube on their own, and at the same time say they are supervised? It could be that many of the solo viewing sessions the child enjoys are in a public area. Though the parent may consider the viewing in this area "on their own," they are keeping half-an-ear open to ensure the child does not stray anywhere they shouldn't.

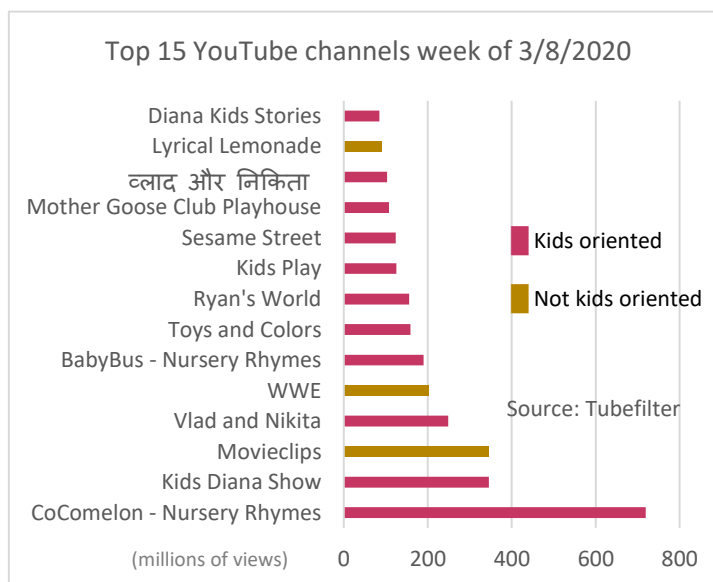
The enormous acceptance of YouTube by parents as a resource for their children is illustrated by how dominant kids channels are on the service. Of the top 15 channels in the second week of March 2020, 12 provide kid-oriented content.^{vi}

5.2 Usage and trust in media

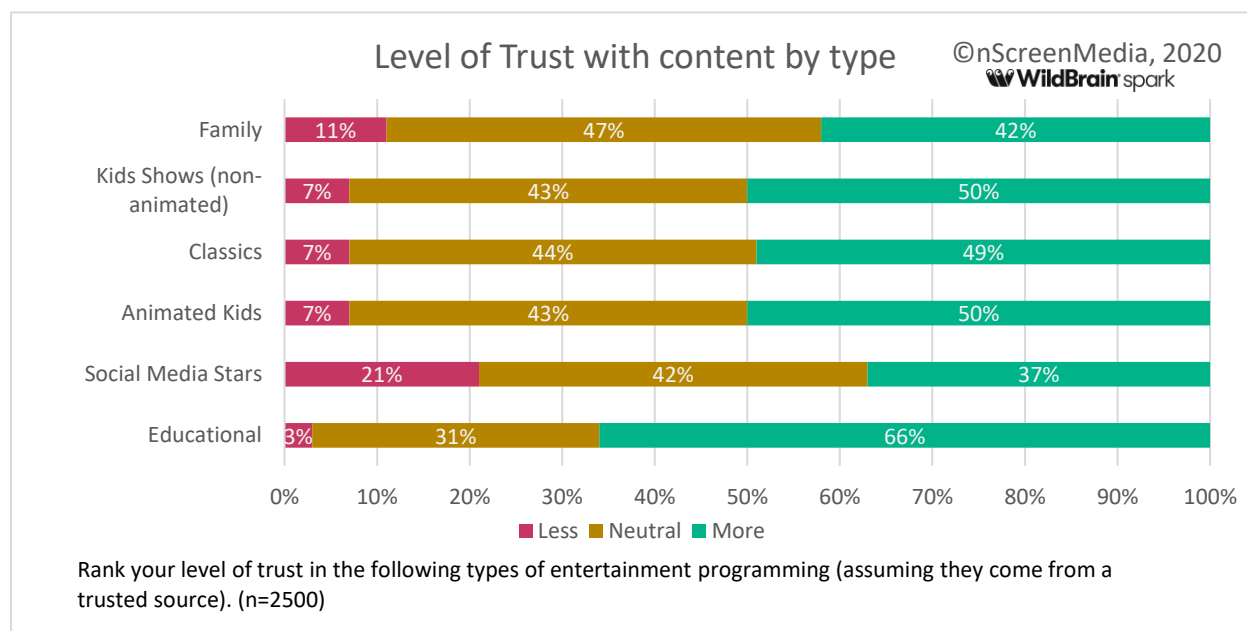
Parents allow their children to watch a broad range of content types. Cartoons remain an enduring favorite, with 67% of children watching them frequently or regularly. Given PBS Kids' popularity, it is no surprise that two-thirds of children watch

educational programming at least regularly. Non-animated kids' shows are almost as popular, with 64% of children watching at least regularly.

Social media is the fourth most popular content type, with 55% of children watching videos in the category at least regularly. The amazing success of Disney+ is a testament to just how important



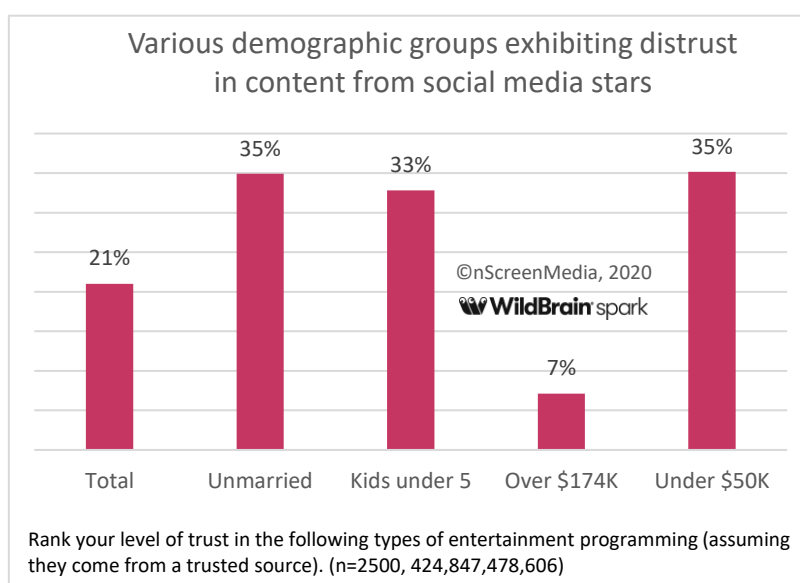
classics and family shows are to kids. About half of the parents' children in our study watch these types of shows regularly or more often.



When it comes to trusting a particular content type, educational content is the leader. Our survey asked parents to rank their level of trust in each content type on a 5-point scale, from least trustworthy to most. Two-thirds of parents say that they view educational content as more trustworthy, far higher than any other category.

It will not come as any surprise that social media stars are viewed as the least trustworthy. By its very nature, social media is relatively unregulated, and parents are understandably less trusting of it. However, as our YouTube data indicates, parents are perfectly happy to let kids watch with proper supervision.

Several demographic groups among our survey participants exhibit sharply different trust levels of the video content their children watch. For example, distrust of social media stars is much higher among unmarried parents, those who have children under-five, or earn less than \$50,000 a year. Lower-income parents were also less likely to allow their children to watch YouTube on their own. Parents earning over \$175,000 tended to trust all types of video more than those earning less.

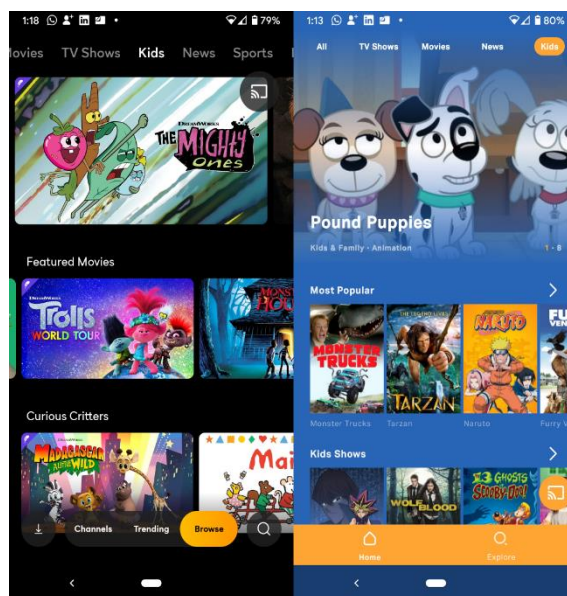


6 Ad-Supported content

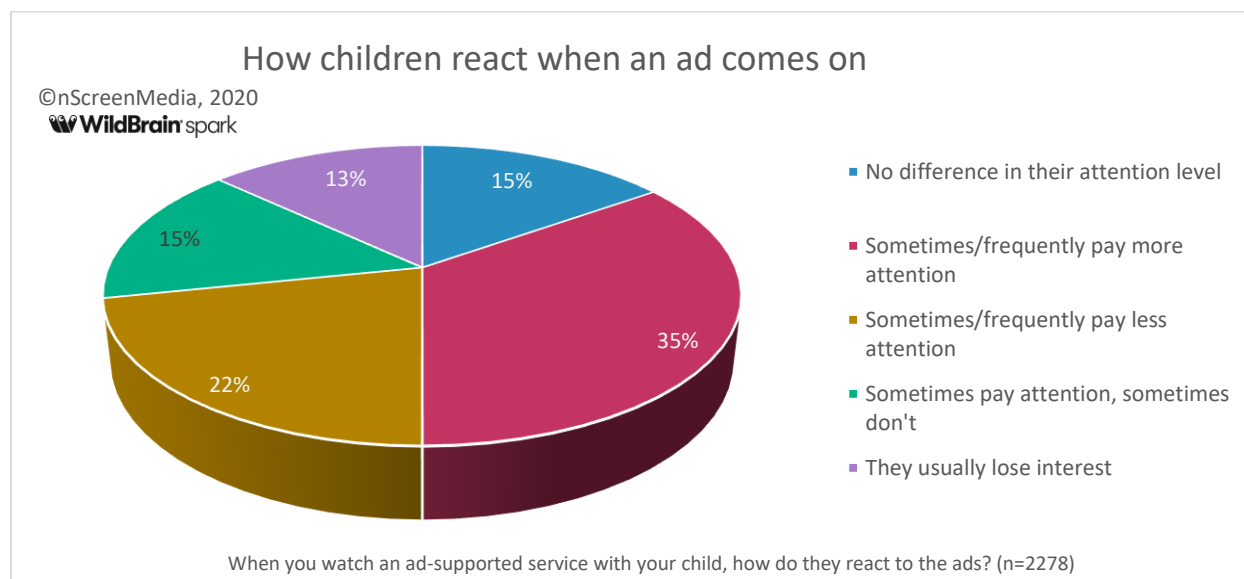
6.1 Acceptance

Free ad-supported content is a staple of the American family. 9-in-10 parents say it is somewhat or very important to them, and the same number say they allow their children to watch with ads. What is more, 3-in-5 say they can watch alone, rather than just with a parent present.

Of course, the ubiquitous usage of YouTube is a strong indicator that children see ads with at least some of the videos they watch. However, other free ad-supported services like Pluto TV and Tubi have also begun to find a growing audience among families. Moreover, new options like Peacock are arriving, with plenty of children's content and dedicated kid interfaces.



6.2 Effectiveness of ads

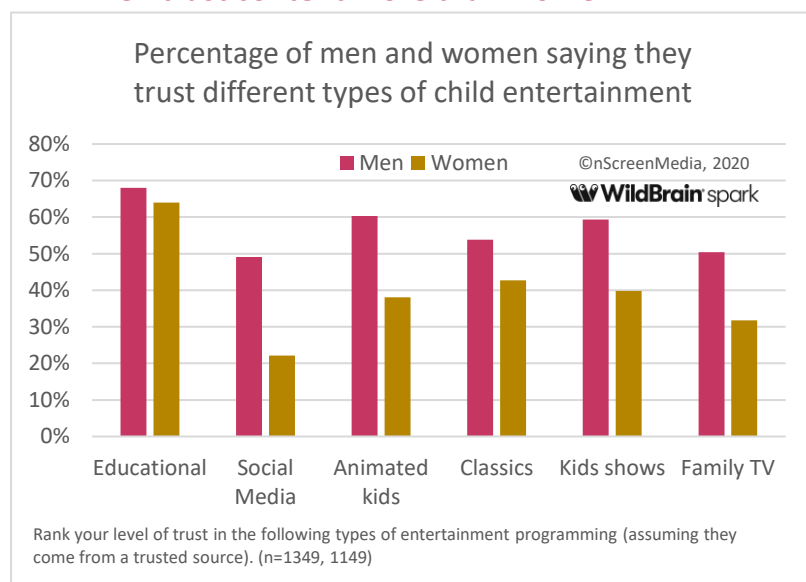


It is one thing for children to see ads during their streaming sessions, but advertisers want to know if they are effective. According to our parents, ads are effective. We asked the parents that allow their children to watch ad-supported content how the kids react when the ads come on. Half say their children have the same level of attention or higher as with the show they are watching. Only 13% say their children did not pay any attention.

7 Feature: Men versus Women

Men and women agree on many of the topics covered in our survey. However, in some cases, their parenting styles diverge, particularly in content source trust level and child purchase influence.

7.1 Men trust content more than women



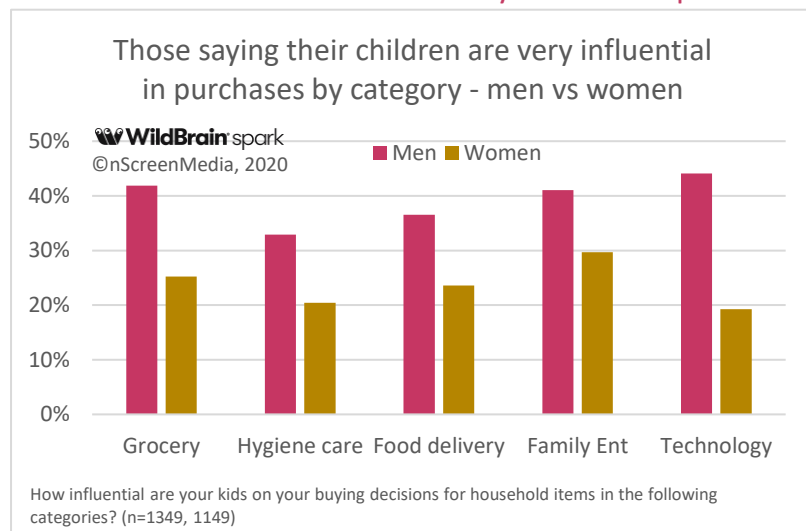
Men are more trusting of the video they let their children watch. In every content category, men rated their level of trust higher than women. For example, nearly half of men say they trust social media to some extent, versus 22% of women.

Nowhere is this trust difference more clearly shown than in their attitude to YouTube. Half of men say they allow their children to freely watch YouTube on their own.

29% of women say the same.

Should we conclude from this data that men are more permissive than women? Not necessarily. 6-in-10 of men and women say they monitor what their children watch on YouTube all the time. As well, in one way, at least, men are more protective of their children. Virtually all (93%) of the men in our study say they use the child modes of the non-child services they let their children use. 77% of women say the same.

7.2 Women are influenced less by children in purchases



Advertisers take note that men seem to be more receptive than women to their children's pleas for Lucky Charms, pizza for dinner, and a new PlayStation 5. In every purchase category we asked our survey group about, women say they are much less likely to be influenced by their children than men.

For example, in technology purchases, 19% of women say their children are very

influential versus 44% of men. In groceries, 25% of women admit to being very influenced by their children, versus 42% of men.

8 Final thoughts

Jane Goodall, the famous primatologist and mother of one, observed:

"One thing I had learned from watching chimpanzees with their infants is that having a child should be fun."

The picture that emerges from our survey data is that co-viewing is a great way for parents and children to have fun together. Virtually all the parents we surveyed spent at least some time in the week co-viewing, and the activity cuts across gender, the child's age, household income levels, and marital status. Co-viewing is a valuable shared activity, and something parents and children make time for throughout their busy day.

Keeping children happy also seems to be a strong motivator for parents. They pay attention to their children's wants and needs and are willing to expend time and money to satisfy them. To be sure, children's interests are front and center in the purchase of entertainment services, when ordering takeout, and at the grocery store. But even in categories like hygiene and technology where we might not expect children to wield much influence, they do.

Finally, there are plenty of opportunities for brands to tell parents and children about their products. Ad-supported viewing is important to most parents, and many trust it enough to allow their children to watch independently.

Our research certainly suggests that making screen time family time will continue to be a key bonding activity for parents and children for many years to come.

ⁱ LicenseGlobal, *Amazon Continues Original Content Push*, Informa, April 6, 2018, <https://www.licenseglobal.com/entertainment/amazon-continues-original-content-push> (accessed on 11/21/2020)

ⁱⁱ Ruth Reader, *IDC: Tablet shipments decline for the first time in Q4 2014, leaders Apple and Samsung both lose market share*, Venturebeat.com, Feb 2, 2015, <https://venturebeat.com/2015/02/02/idc-tablet-shipments-decline-for-the-first-time-in-q4-2014-leaders-apple-and-samsung-both-lose-market-share/> (accessed on 11/11/2020)

ⁱⁱⁱ IDC, *Worldwide Tablet Shipments Continue to Decline in Q4 2019*, According to IDC, IDC, Jan 30, 2020, <https://www.idc.com/getdoc.jsp?containerId=prUS45959420> (accessed on 11/11/2020)

^{iv} nScreenMedia calculations using Roku quarterly financially reporting data.

^v Colin Dixon, *Smart TVs deliver penetration but not viewing time!*, nScreenMedia, Aug 9, 2020, <https://nscreenmedia.com/smart-tv-penetration-good-viewing-bad/> (accessed on 11/11/2020)

^{vi} Sam Gutelle, *Top 50 Most Viewed US YouTube Channels – Week Of 3/16/2020*, tubefilter, March 18, 2020, <https://www.tubefilter.com/2020/03/18/top-50-most-viewed-youtube-us-channels-worldwide-2020-03-16/> (accessed on 11/22/2020)