THE DIFFERENCE 5 YEARS MAKES...

A KID IN 2014 IS VERY DIFFERENT **TO A KID IN 2009**

35%

2014

12%

2009

6%

 TV

Internet

94%

Which of the following do you do almost every day?

62% of kids see their friends less than kids did in 2009

Browser-based MSN Messenger

■ FB messenger used by 46% of 8-14s

Source: SuperAwesome Weekly Survey

62%

2009

device. Five years ago, this was just 12%

Source: SuperAwesome Weekly Survey

ACCESS TO MOBILE DEVICES

TODAY, AN 8-IOYR OLD IS OVER 3 TIMES MORE LIKELY TO HAVE A SMARTPHONE THAN IN 2009

Source: Youthscape/OfCom Children's Media Use Report

GAMING

35% of kids now have a tablet/smartphone as their first gaming

> 24% 2% 5013 2010 24% of 4-6 year olds wanted iPads for Christmas

2013. Only 2% said the same in 2010, the year the device was launched.

Nintendo saw a reverse trend with the DS declining from 23% to 6% in the same period. Source: SuperAwesome

OnTrack Report 2010-13

NUMBER OF SCREENS

Own Tablet Family Tablet

21%

2014

Mobile Phone 84% **75%** 54% 55% 51% 32%

SOCIAL AND FRIENDS

Which of these screens do you

usually look at on a normal day?

ONLINE CHAT HAS CHANGED, BECOMING MORE MOBILE AND **MORE FREQUENTLY USED**

465M MAU

59%

MINEERAFT

33%

The mobile games market has

Revenue predictions have been

grown by \$7bn since 2009

WHO ARE THE WINNERS?

2014

was at its peak, boasting Messenger's replacement, Skype (approx. 280m MAU), WhatsApp (465m MAU) and Facebook Messenger 330m MAU

280M MAU

Chat now dominated by a range of applications including

of 8-14 year old smartphone owners use chat apps, 66% of these kids use them at least every few hours ■ WhatsApp used by 48% of 8-14s

THIS GENERATION OF KIDS **ARE MORE CREATORS**

THAN CONSUMERS

CONSTRUCTION TOYS (US SALES) UP 22% **IU 5015** \$326M IN REVENUE 5015 2013

KIDS ARE CREATING THEIR OWN ENTERTAINMENT **26%**

5011

33% Have used Photoshop or InDesign Have made a film with friends, 42% 33% have uploaded one to YouTube Source: SuperAwesome Weekly Survey

DOLLARS AROUND

CHANGING KIDS

Global toy sales rose from \$79.6bn in 2009 to \$83.4bn in 2010, but

had reached just \$84.1bn by 2012.

PATTERNS ARE SHIFTING

outstripped by over \$1bn due to the popularity of tablets Source: The Global Mobile Games Landscape 2013 Association data

Minecraft made more money in its 4th year than the previous 3 years #1 premium priced game on Android and iOS Now accounts for 9% of the global toy market

10% increase in sales in 2013 to \$4.6bn WHY HAVE THESE BRANDS BEEN SUCCESSFUL OVER My Talking Tom became the top games across all platforms in 135 countries within 10 days of **OTHERS?** launching 230m MAU and 500,000 YouTube channel subscribers

ECOSYSTEM

You IDOM+ VIEWS

Makes use of 'open innovation':

LEGO Minecraft was suggested

hours and was made into a set

by fans, gained 10,000 votes

from the public within 24

as a result

Released their 'pocket edition'

in 2011, drawing in a younger,

console versions of the game

mobile-using audience who

then graduated to PC or

Teamed up with Disney in order

videos, gaining 100m+ views, it

will release a kids' TV show later

this year

to produce high-quality YouTube