

# THE DIFFERENCE 5 YEARS MAKES...

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

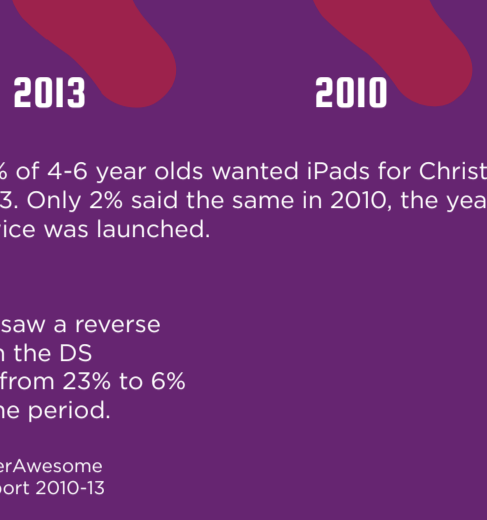
## 1. ACCESS TO MOBILE DEVICES

**TODAY, AN 8-10YR OLD IS OVER 3 TIMES MORE LIKELY TO HAVE A SMARTPHONE THAN IN 2009**

Source: Youthscape/OfCom Children's Media Use Report



## 2. GAMING

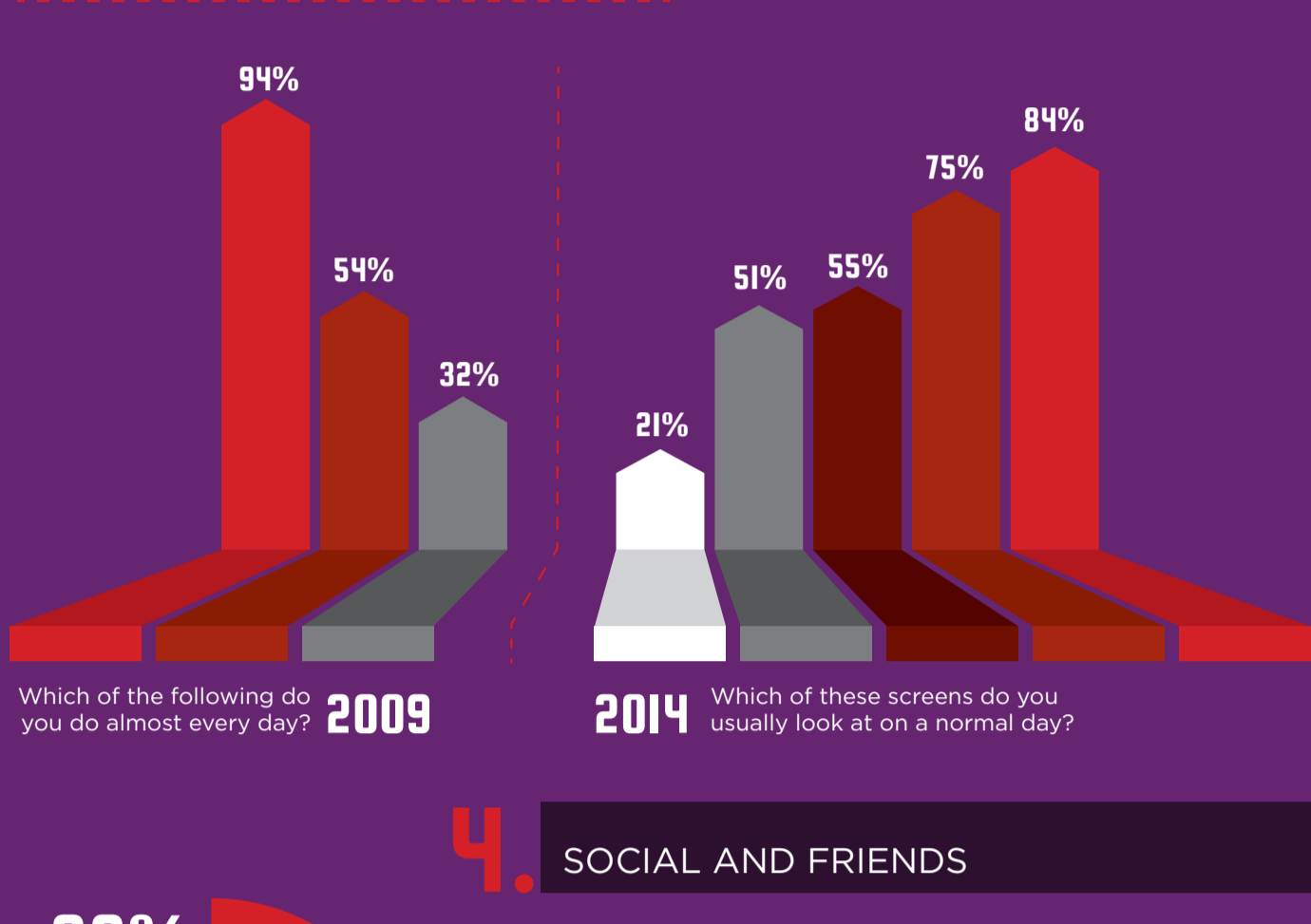


24% of 4-6 year olds wanted iPads for Christmas 2013. Only 2% said the same in 2010, the year the device was launched.

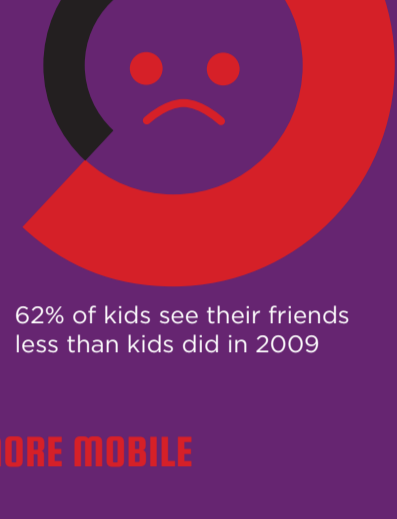


Nintendo saw a reverse trend with the DS declining from 23% to 6% in the same period.

## 3. NUMBER OF SCREENS

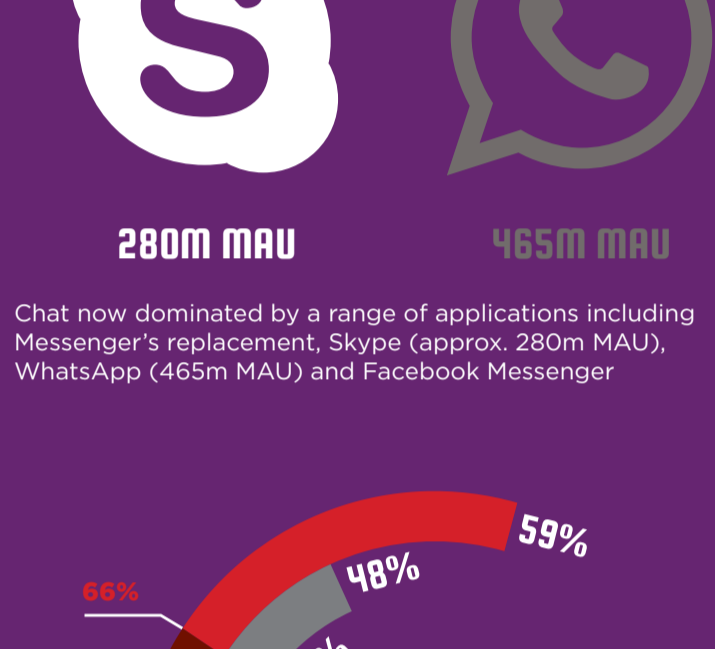
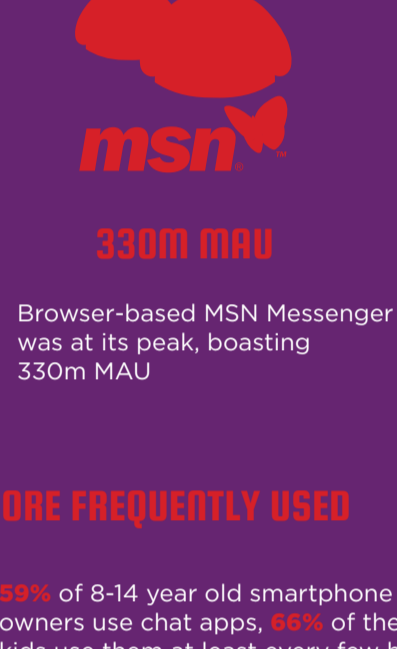


## 4. SOCIAL AND FRIENDS



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

### MORE MOBILE



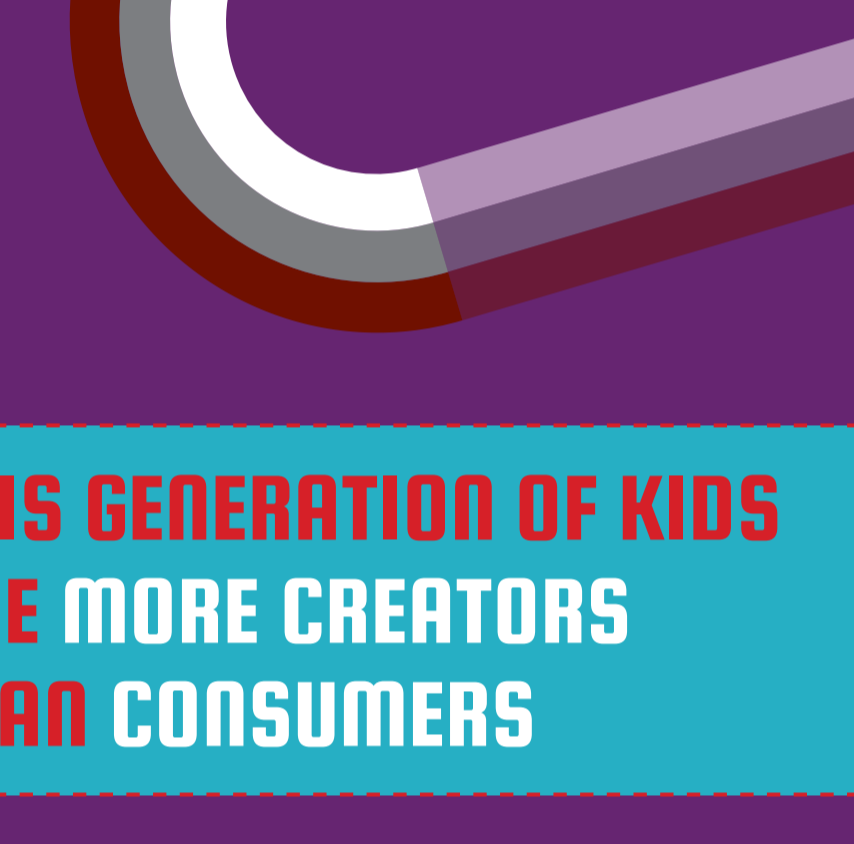
### MORE FREQUENTLY USED

89% of 8-14 year old smartphone owners use chat apps, 66% of these kids use them at least every few hours

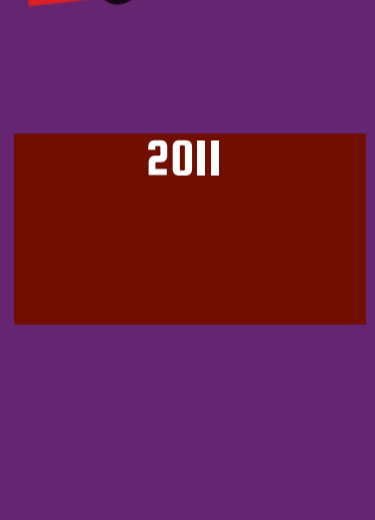
WhatsApp used by 48% of 8-14s

FB messenger used by 46% of 8-14s

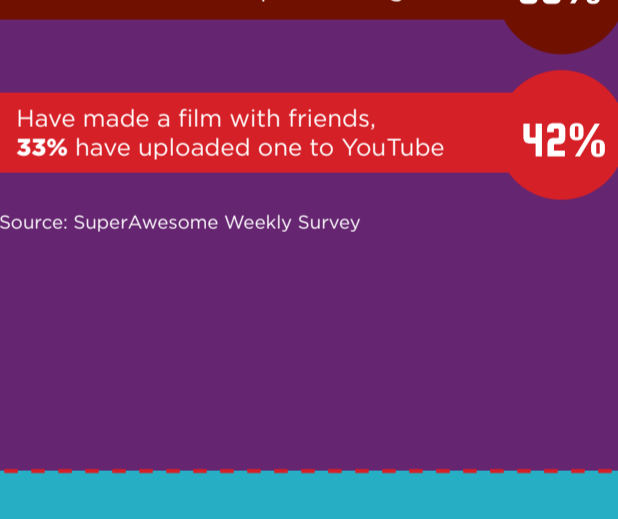
Source: SuperAwesome Weekly Survey



## THIS GENERATION OF KIDS ARE MORE CREATORS THAN CONSUMERS



### KIDS ARE CREATING THEIR OWN ENTERTAINMENT



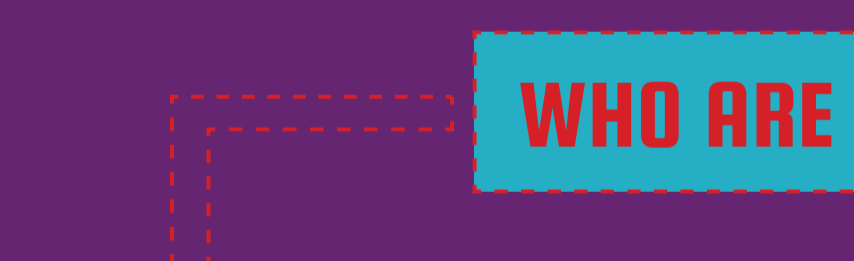
Source: SuperAwesome Weekly Survey



## CHANGING KIDS PATTERNS ARE SHIFTING DOLLARS AROUND

### WHILE THE TRADITIONAL TOY MARKET HAS BEEN COMPARATIVELY STAGNANT

Global toy sales rose from \$79.6bn in 2009 to \$83.4bn in 2010, but had reached just \$84.1bn by 2012.



Source: Toy Association data

### MOBILE GAMING IS UP (THROUGH THE ROOF)

The mobile games market has grown by \$7bn since 2009

Revenue predictions have been outstripped by over \$1bn due to the popularity of tablets

Source: The Global Mobile Games Landscape 2013

## WHO ARE THE WINNERS?

### MINECRAFT

Minecraft made more money in its 4th year than the previous 3 years combined

#1 premium priced game on Android and iOS

### LEGO

Now accounts for 9% of the global toy market

10% increase in sales in 2013 to \$4.6bn

### TALKING TOM AND FRIENDS APP

My Talking Tom became the top games across all platforms within 10 days of launching

230m MAU and 500,000 YouTube channel subscribers



**WHY HAVE THESE BRANDS BEEN SUCCESSFUL OVER OTHERS?**

## ECOSYSTEM



Released their 'pocket edition' in 2011, drawing in a younger, mobile-using audience who then graduated to PC or console versions of the game

Makes use of 'open innovation': LEGO Minecraft was suggested by fans, gained 10,000 votes from the public within 24 hours and was made into a set as a result

Teamed up with Disney in order to produce high-quality YouTube videos, gaining 100m+ views, it will release a kids' TV show later this year