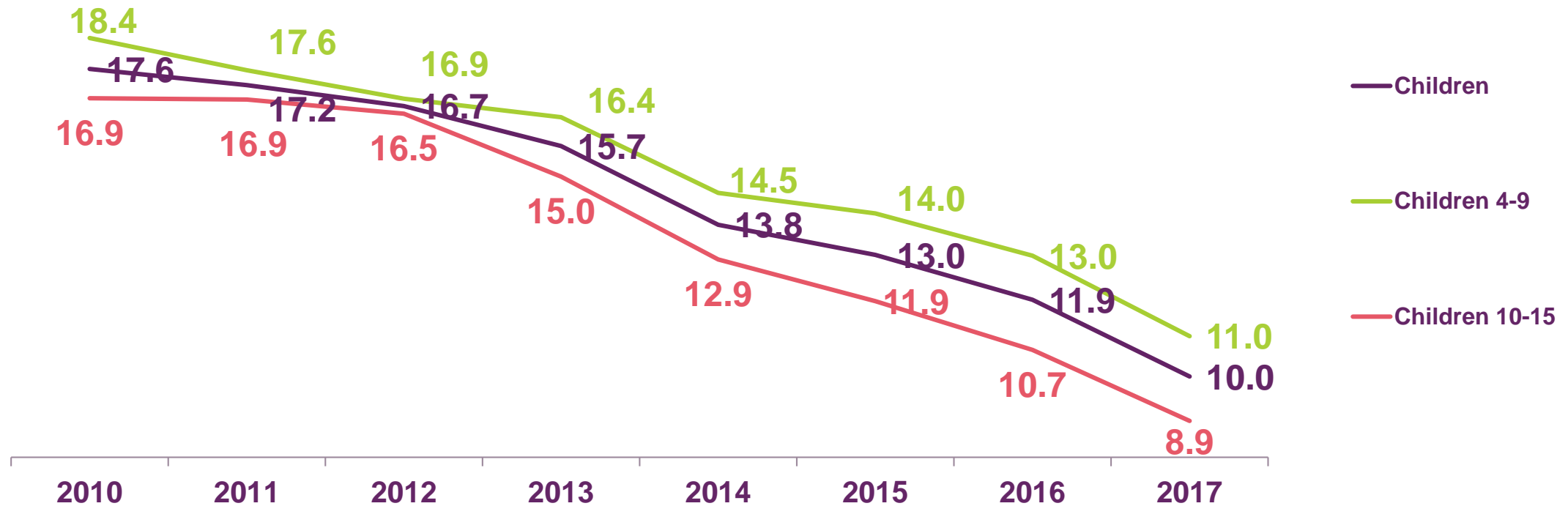


Research into children's content consumption, including Netflix and YouTube

July 2018



BARB shows that children's TV viewing on a TV set continues to decline



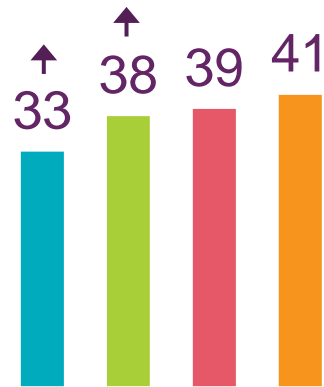
Source: BARB, 2010-2017. Total TV consolidated



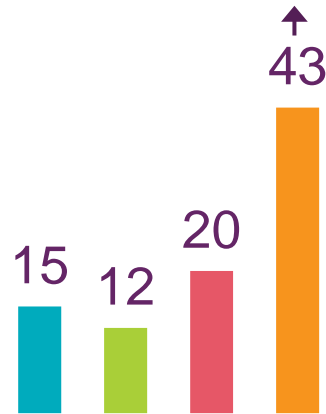
TV set



Tablet



Mobile phone



Desktop computer/
laptop/
netbook

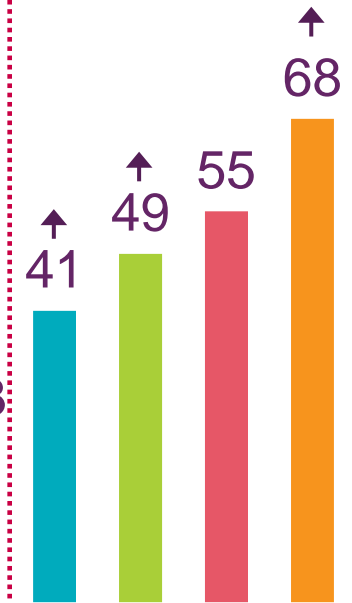


Games console/
player



But 7 in 10 12-15s
watch TV programmes
on devices other than
the TV set

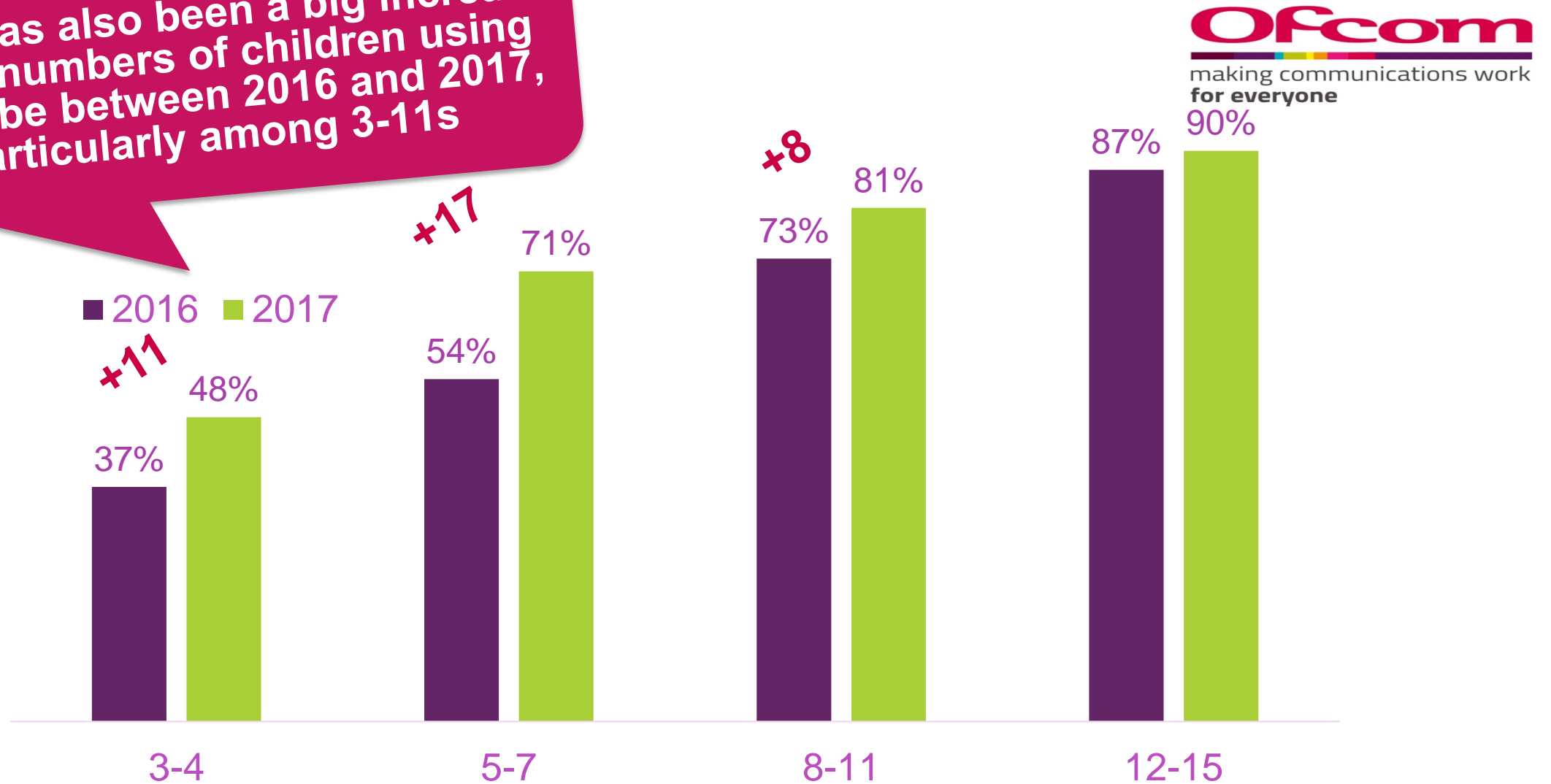
Any device
other than a
TV set



3-4
5-7
8-11
12-15

Source: Ofcom Children's Media Lit Tracker 2017. QP5/ QC1 – Does your child ever use any of these devices to watch television programmes or films at home or elsewhere? (prompted responses, multi-coded). Responses from parents for 3-7 year olds and from children aged 8-15. Base: Parents of children aged 3-4 (677) or 5-15 (412 aged 5-7, 497 aged 8-11, 479 aged 12-15) - significance testing shows any change between 2016 and 2017.

There has also been a big increase in the numbers of children using YouTube between 2016 and 2017, particularly among 3-11s

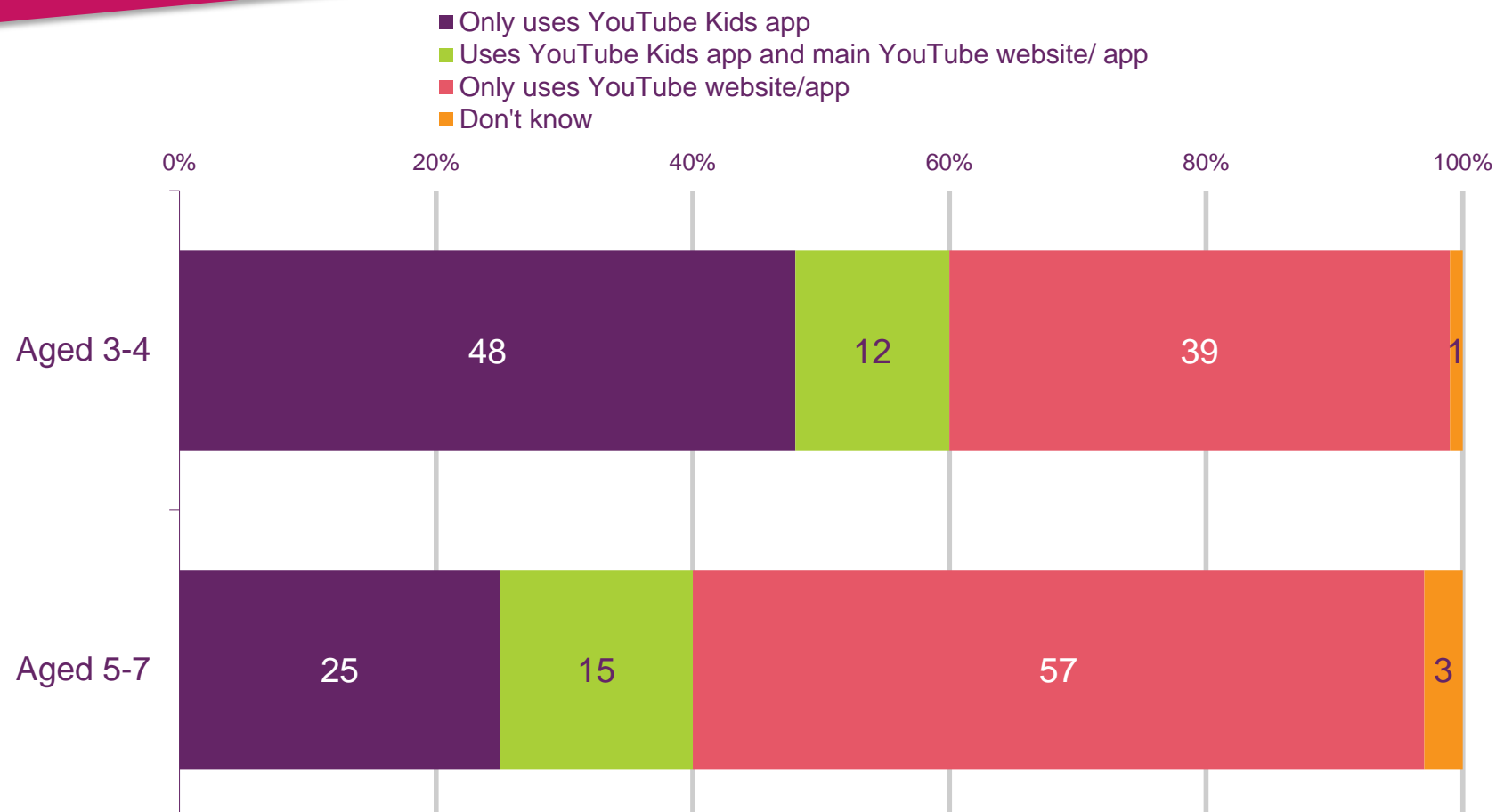


Source: Ofcom Children's Media Lit Tracker 2017. QP22A/ QC6. Does your child ever use the YouTube website or app? (prompted responses, single coded) .

Responses from parents for 3-7 year olds and from children aged 8-15.

Base: Parents of children aged 3-4 (677) or 5-15 (1388 aged 5-15, 412 aged 5-7, 497 aged 8-11, 479 aged 12-15). Significance testing shows any change between 2016 and 2017.

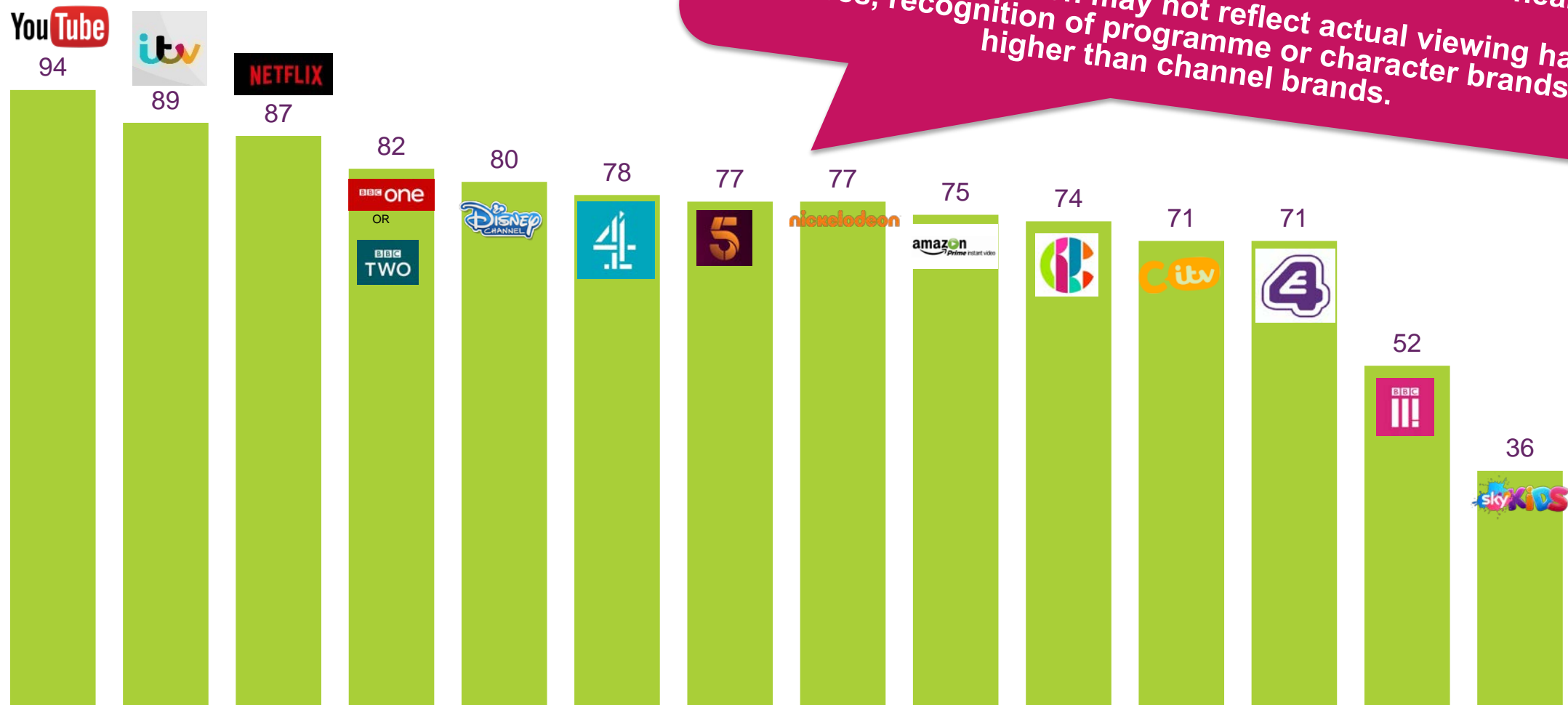
Around half of 3-4s and a quarter of 5-7s only use the YouTube kids app. The rest use either the main YouTube website or app or a mixture of the two



Source: Ofcom Children's Media Lit Traequer 2017. QP22B - Do they use the main YouTube website or app, or the app that is aimed specifically at under 5s called YouTube Kids, or do they use both? (unprompted responses, multi-coded).

Base: Parents of children aged 3-7 whose child uses the YouTube website or app (325 aged 3-4, 285 aged 5-7).

When prompted with a range of content brands, YouTube is the content brand 12-15s are most likely to say they've heard of. Higher brand recognition may not reflect actual viewing habits. In some cases, recognition of programme or character brands may be higher than channel brands.

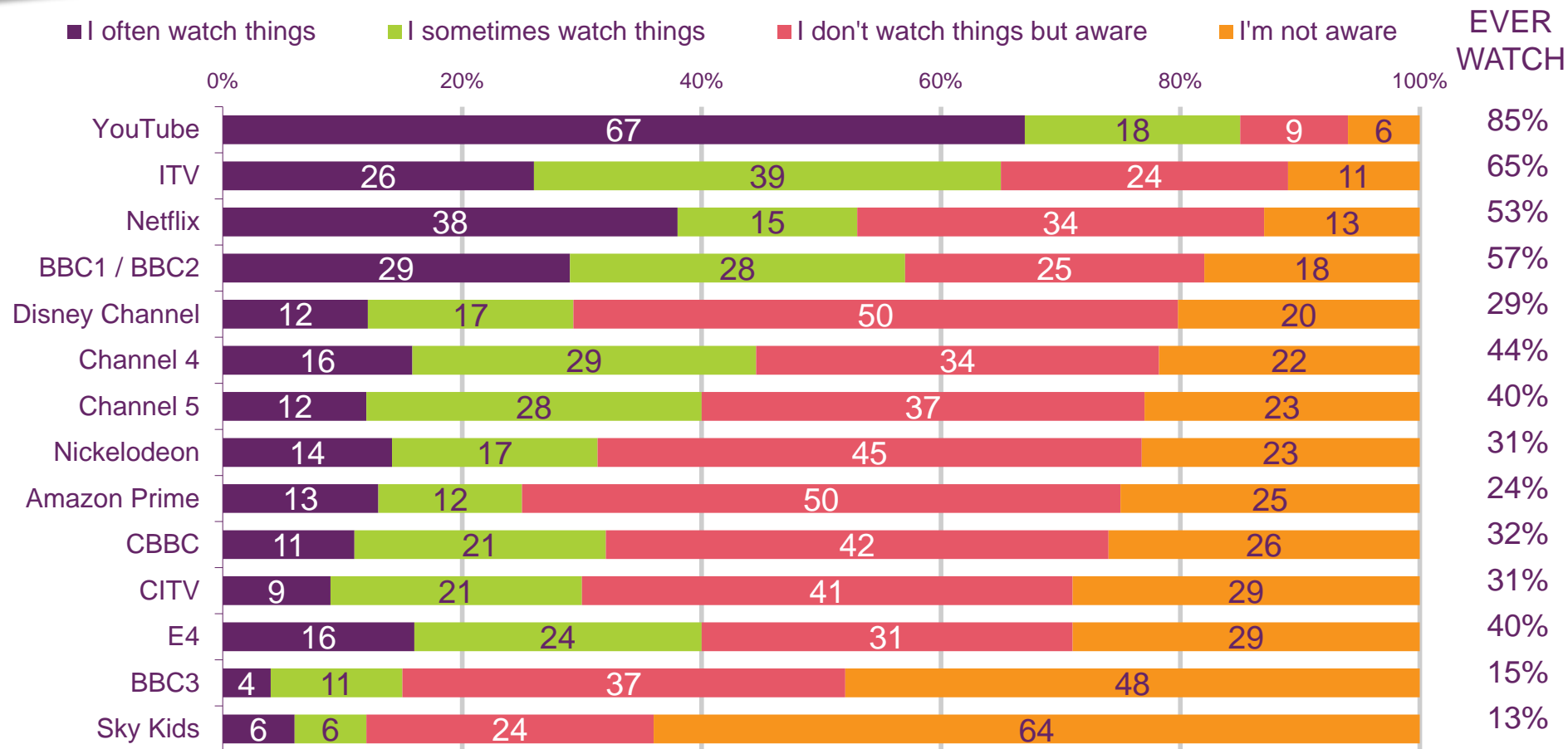


Source: Online survey with children aged 12-15

Q1 – Here are some companies that you may have heard of. Can you please pick those ones that you know? (prompted responses, multi coded)

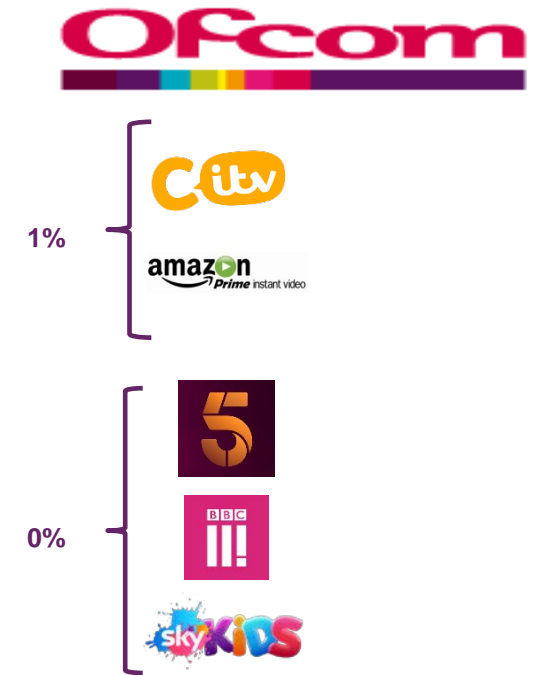
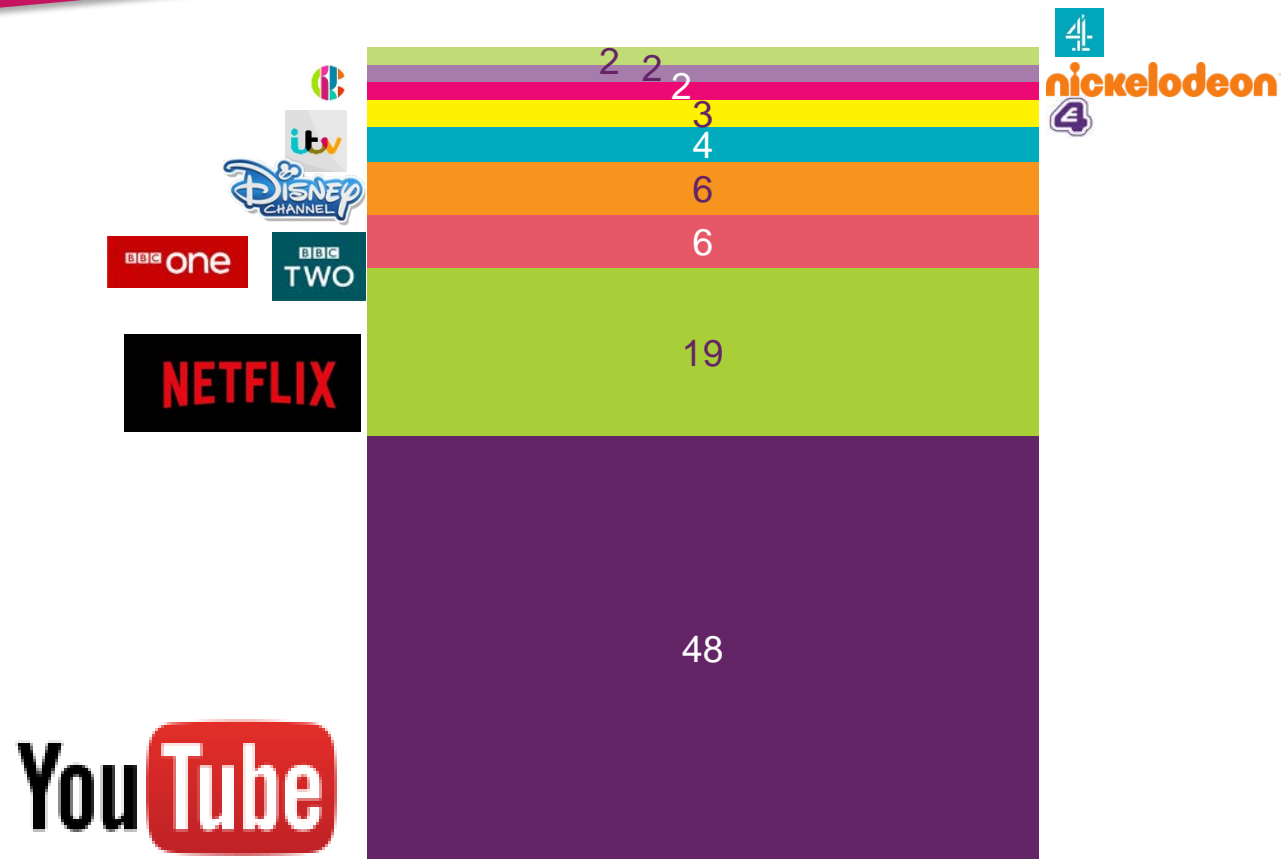
Base: Children aged 12-15 who go online (500).

YouTube and Netflix are the channels that 12-15s are most likely to say they often use to watch things



Source: Online survey with children aged 12-15.
Q2A - Can you please pick those that you ever use to watch TV programmes, films, videos or clips? (prompted responses, multi -coded) / Q2B - Please now sort these into two groups based on how often you watch TV programmes, films, videos or clips on them. Can you click on each picture and drag it onto one of these two groups that best describes how frequently you use them to watch things - I sometimes watch things on these / I often watch things on these. (prompted responses, single coded). Base: Children aged 12-15 who go online (500).

And YouTube and Netflix are the brands 12-15s are most likely to say they would miss the most



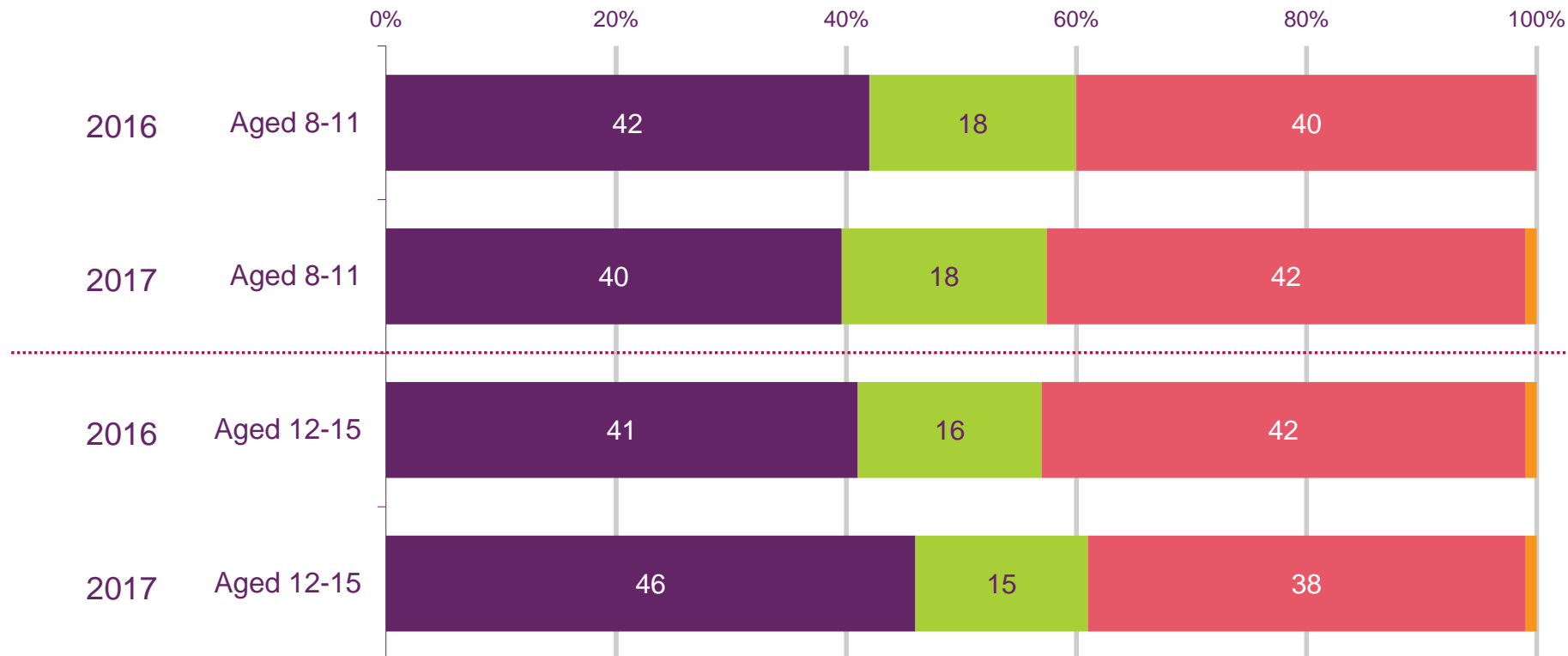
Source: Online survey with children aged 12-15

Q4 - Which one of these would you miss the most if you couldn't watch it anymore? (prompted responses, single coded).

Base: Children aged 12-15 who go online (500).

Older children increasingly prefer to watch YouTube videos over TV

■ Prefer to watch YouTube videos ■ Prefer to watch TV programmes on a TV set
 ■ Like both the same ■ Don't know



Source: Ofcom Children's Media Lit Tracker 2017.

QC7C – Do you prefer to watch YouTube videos, TV programmes on a TV set, or do you like both the same? (unprompted responses, single coded)

Base: Children aged 8-15 who use the YouTube website or app and watch TV on a TV set (367 aged 8-11 and 393 aged 12-15).

Older children are more likely to watch humorous content and music videos on YouTube while younger children are more likely to watch animation or songs

Content ever watched by all who use the YouTube website or app	Aged 3-4	Aged 5-15	Aged 5-7	Aged 8-11	Aged 12-15
Base	325	1100	285	388	427
Funny videos/ jokes/ pranks/ challenges	37%	69%	53%	76%	71%
Music videos	33%	62%	40%	61%	75%
Cartoons/ animations/ mini-movies or songs	84%	48%	69%	47%	35%
'How-to' videos or tutorials about hobbies/ sports/ things they are interested in	16%	40%	28%	45%	43%
Game tutorials/ walk-throughs/ watching other people play games	12%	39%	30%	42%	40%
Vloggers or YouTube personalities	6%	32%	16%	35%	40%
Film trailers, clips of programmes, 'best-bits' or programme highlights	8%	31%	16%	26%	43%
Sports/ football clips or videos	4%	28%	14%	33%	32%
Whole programmes or films	13%	22%	14%	22%	27%
'Unboxing' videos - e.g. where toys are unwrapped or assembled	26%	21%	20%	23%	20%

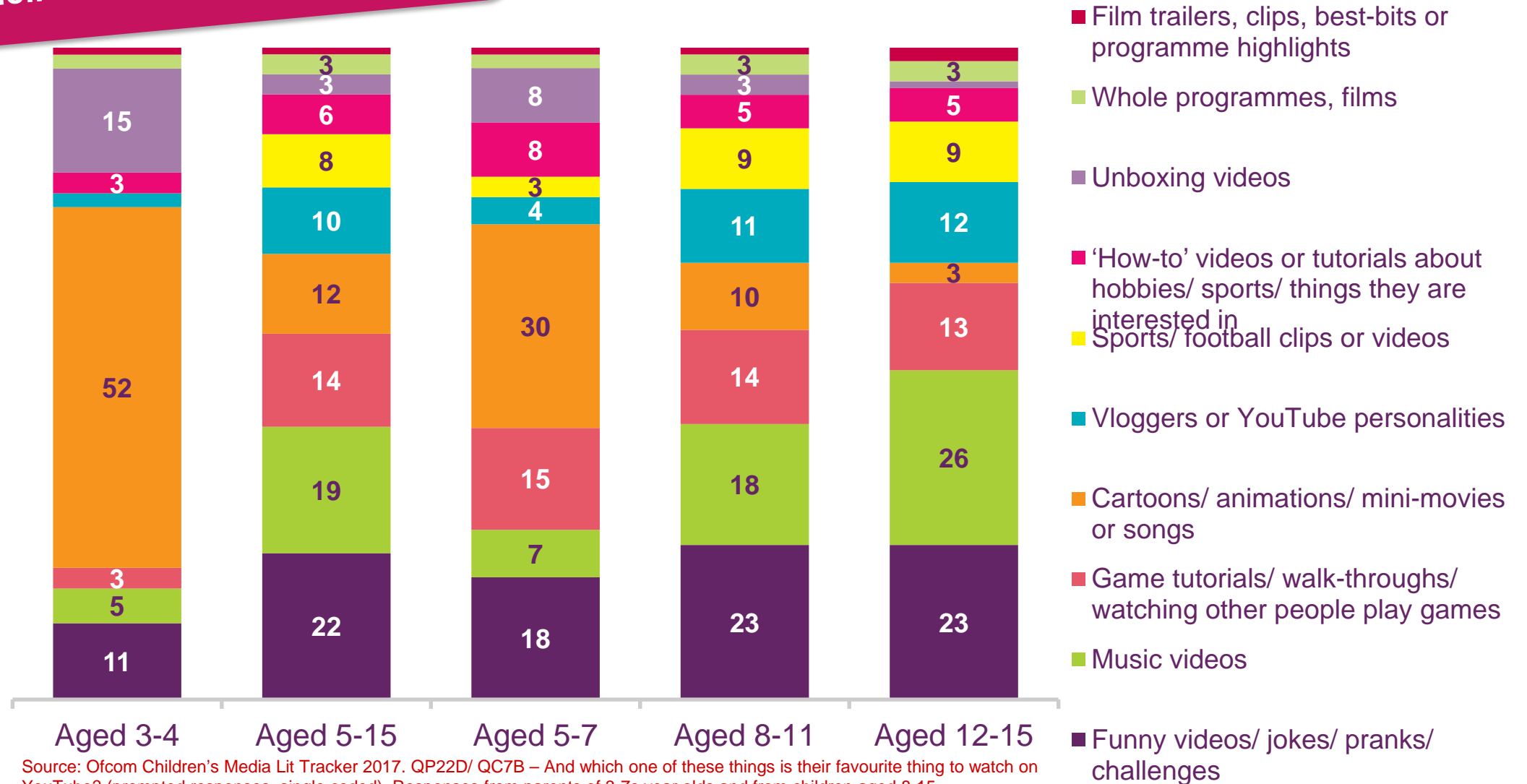


Source: Ofcom Children's Media Lit Tracker 2017.

QP22C/ QC7A – Here is a list of the sort of things that your child may have watched on YouTube. Which if any of these types of things do they watch on YouTube? (prompted responses, multi-coded) Responses from parents of 3-7s year olds and from children aged 8-15

Older children have a diverse range of favourite types of content on YouTube, reflecting how YouTube enables them to explore their own particular interests

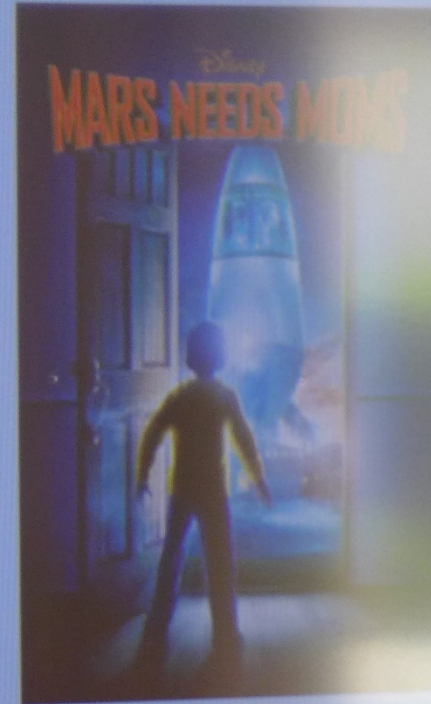
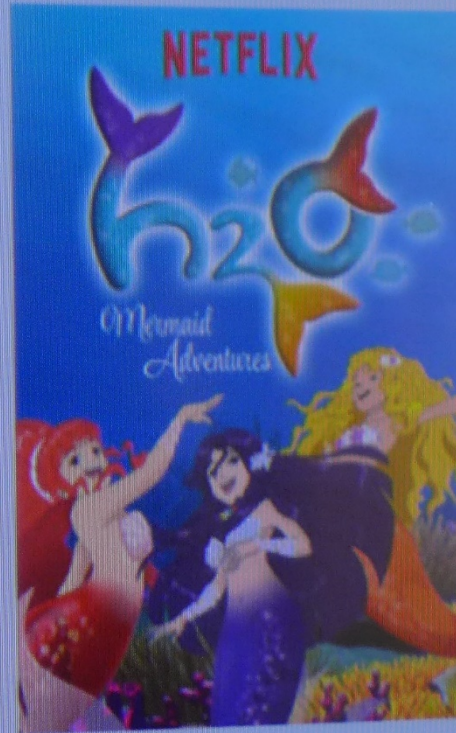
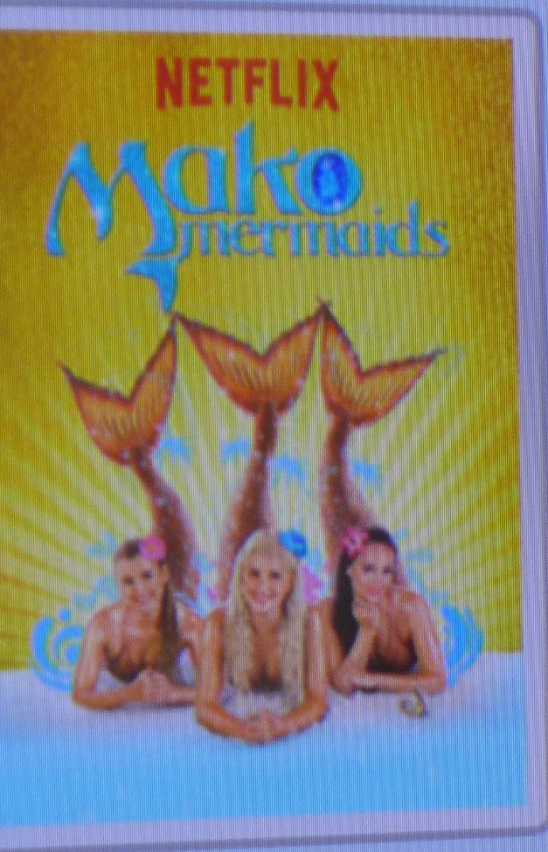
Children's favourite types of content to watch on YouTube



Source: Ofcom Children's Media Lit Tracker 2017. QP22D/ QC7B – And which one of these things is their favourite thing to watch on YouTube? (prompted responses, single coded). Responses from parents of 3-7s year olds and from children aged 8-15.

Base: Parents whose child uses YouTube website or app aged 3-4 (325) or 5-15 (1100 aged 5-15, 285 aged 5-7, 388 aged 8-11, 427 aged 12-15).

ned by Maddie

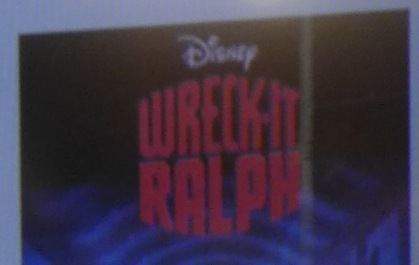
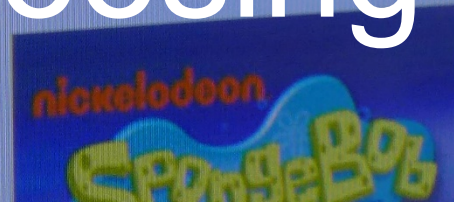
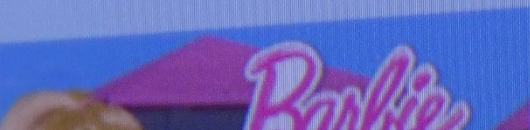


Mako Mermaids: An H2O Adventure

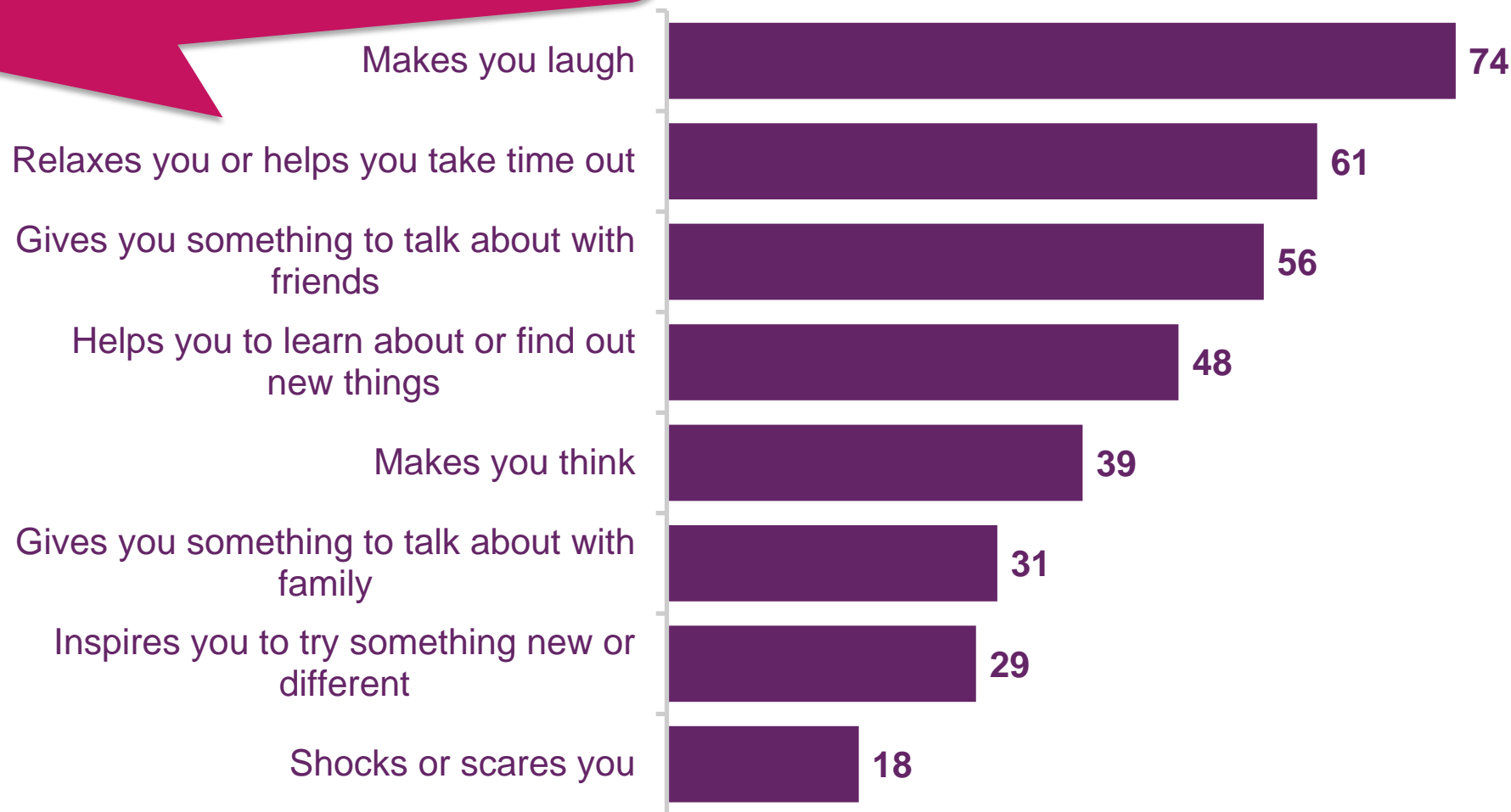
Three mermaids try to reverse the magical merman properties acquired by a human boy named Zac in this "H2O" sequel.

39 episodes

Reasons for choosing content



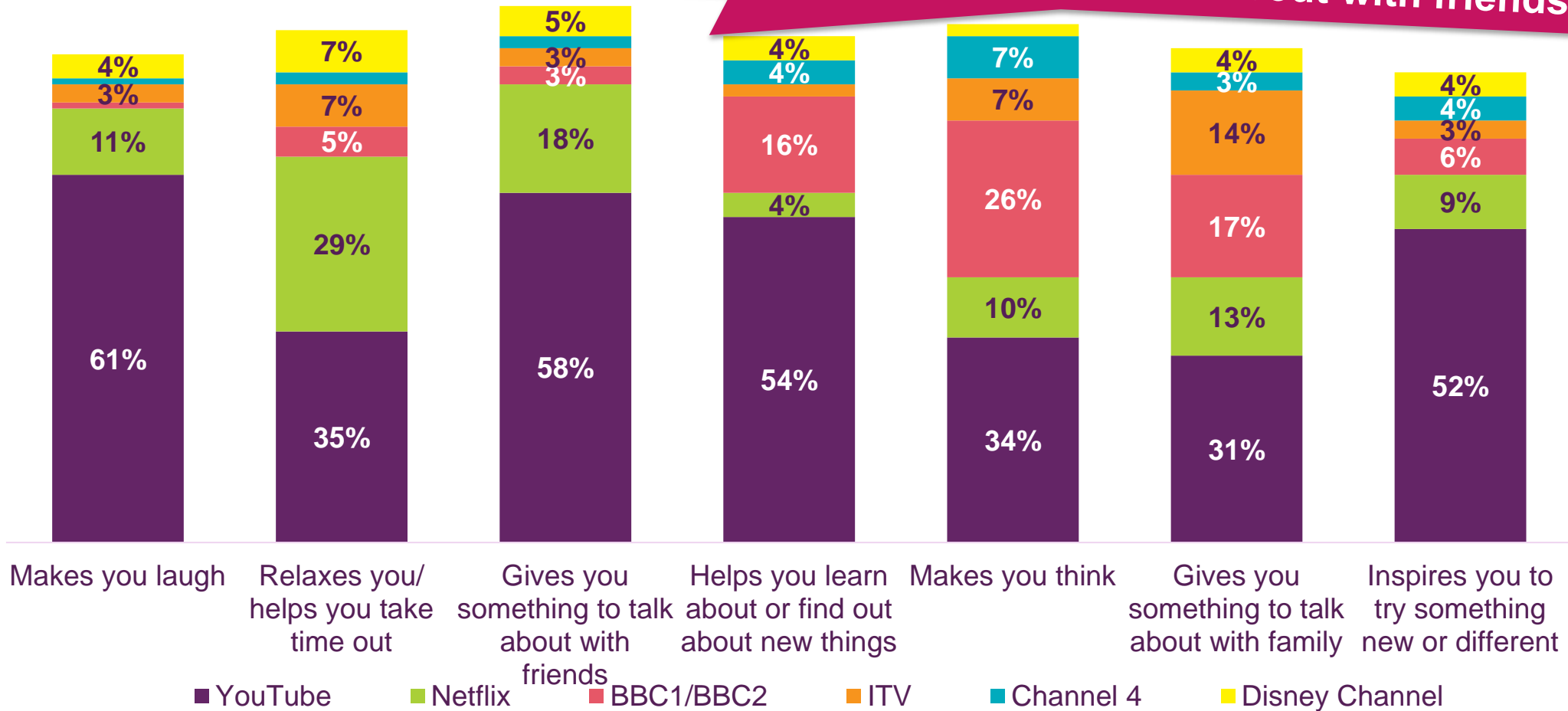
$\frac{3}{4}$ of 12-15s say content that makes them laugh is an important factor when choosing what to watch



Source: Online survey with children aged 12-15

Q5 - Here are some reasons why you might choose to watch something. Click on each reason if you think it is important to you when choosing something to watch? (prompted responses, multi-coded). Base: Children aged 12-15 who go online (500)

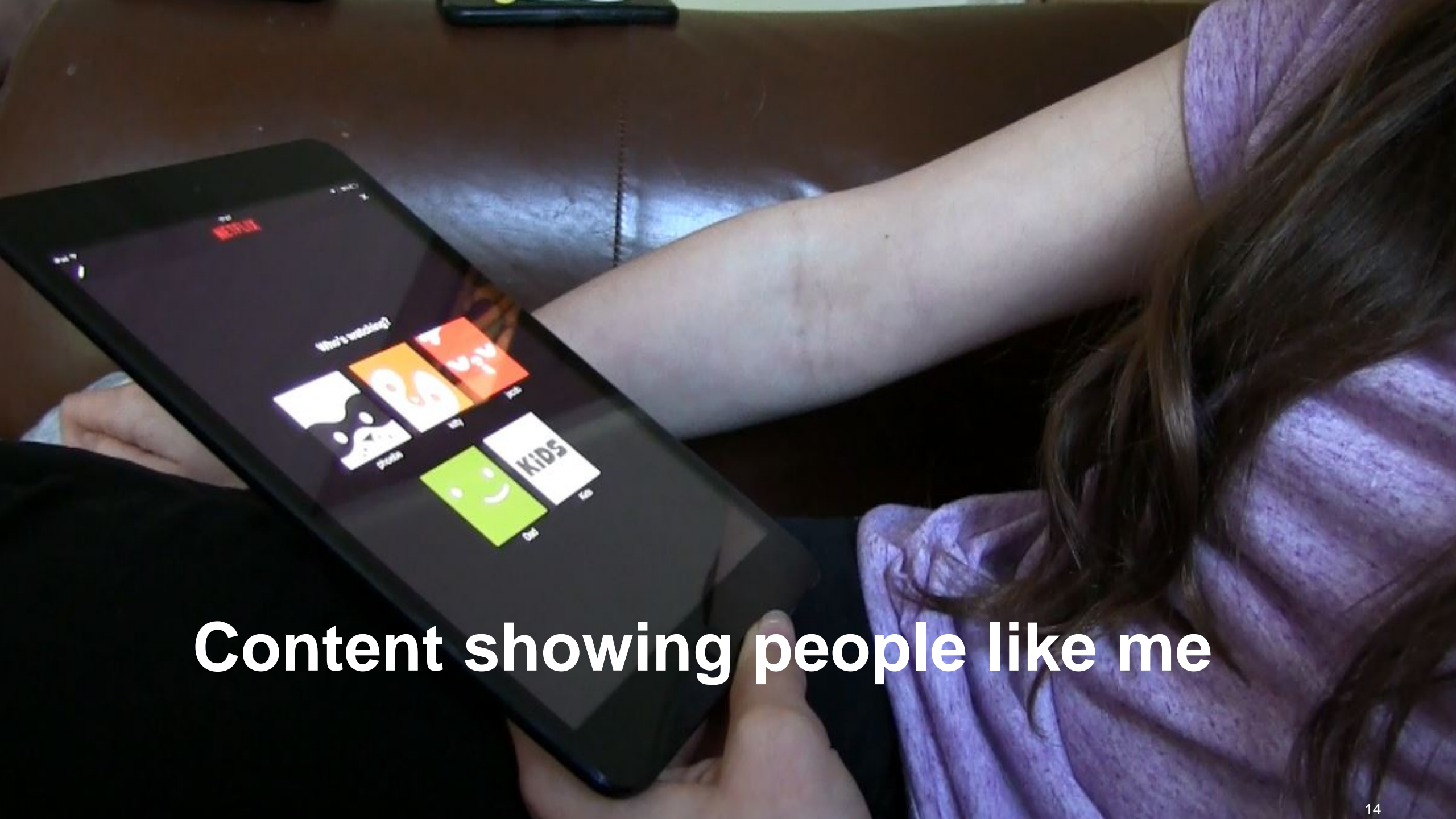
Children use different sources for different reasons. While YouTube dominates, the BBC is important for content that makes 12-15s think, gives them something to talk about with family and helps them learn new things. Netflix is important for content that helps 12-15s relax and take time out and for content that gives them something to talk about with friends.



Source: Online survey with children aged 12-15

Q7/Q8/Q9/Q10/Q11/Q12/Q13 - Which one of these would you choose first to watch something that..... (prompted responses, multi-coded)

Base: Children aged 12-15 who go online that say it is important that the content they watches (variable base)

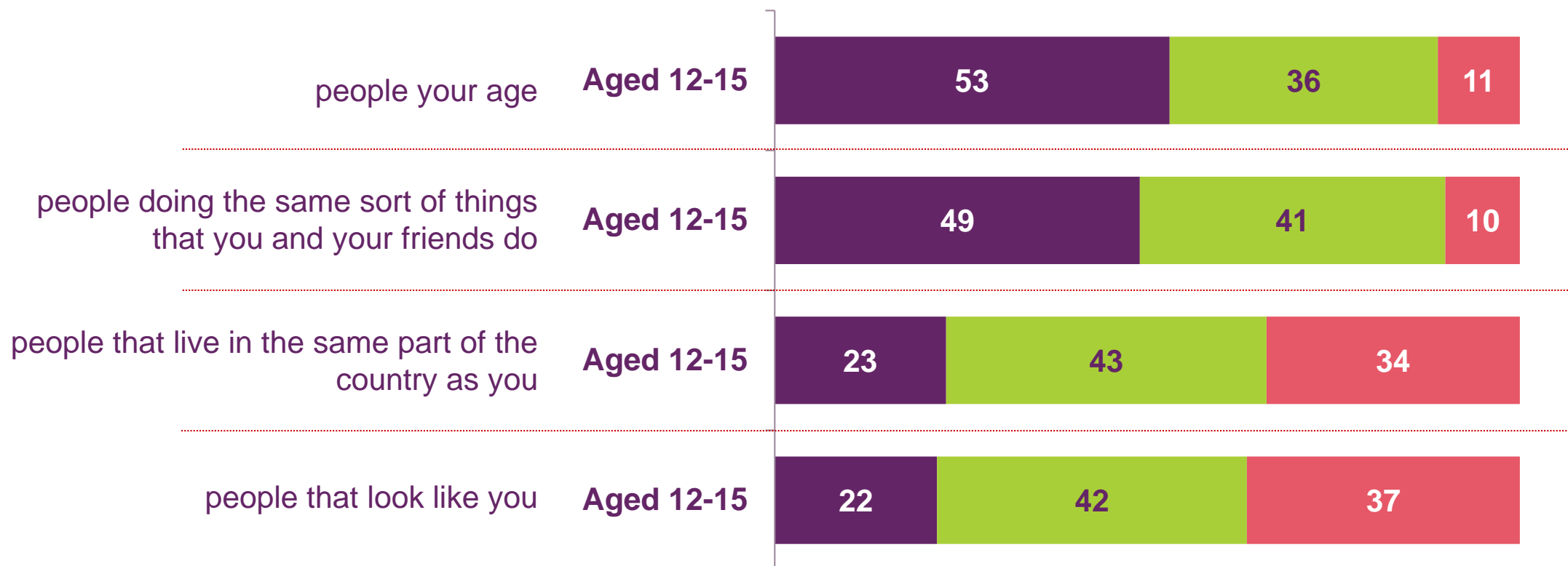


Content showing people like me

Around ½ of 12-15s think it's important that there's content that includes people their age and doing the same sorts of things they and their friends do

■ Important ■ Neither/ Don't know ■ Not important

Importance of watching things that include....



Source: Online survey with children aged 12-15

Q6 - How important is it to watch things that include..... (prompted responses, single coded)

Base: Children aged 12-15 who go online (500)

But around 4 in 10 think there aren't enough programmes showing children that live in the same part of the country as them

There are enough programmes....

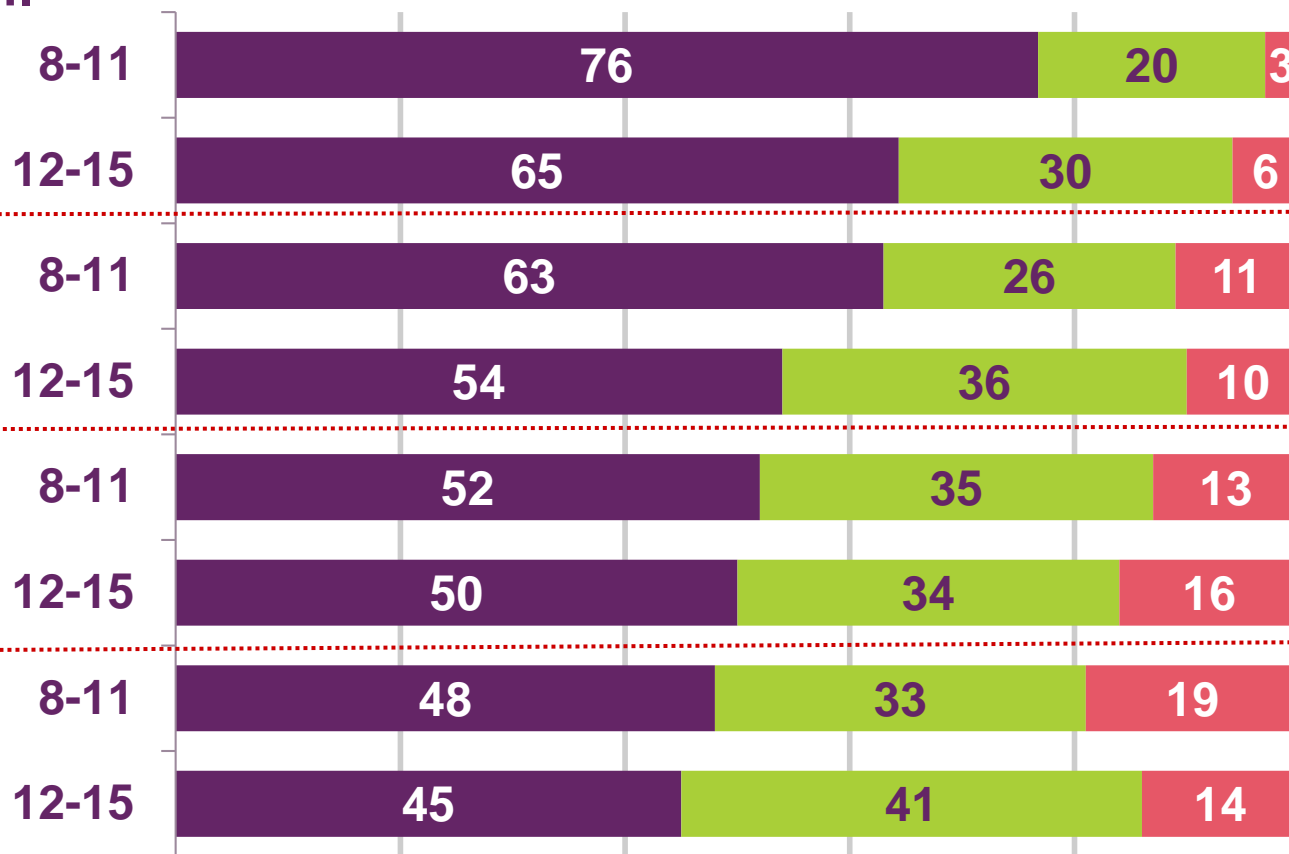
for children my age

that show children doing the sorts of things me and my friends do

that show children that look like me

that show children that live in the same part of the country as me

■ Yes ■ No ■ Don't know



Source: Ofcom Children's Media Lit Tracker 2017.

QC4A/B/C/D –I'm going to read out some things about the TV programmes that you watch. Which answer would you choose for each (prompted responses, single coded)

Base: Children aged 8-15 who watch TV at home or elsewhere (488 aged 8-11, 467 aged 12-15).

Want to know more?

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