Gen Alpha: the real picture

A look at tomorrow's consumers

GWI.

In this report

Click the dots to navigate

Methodology & definitions

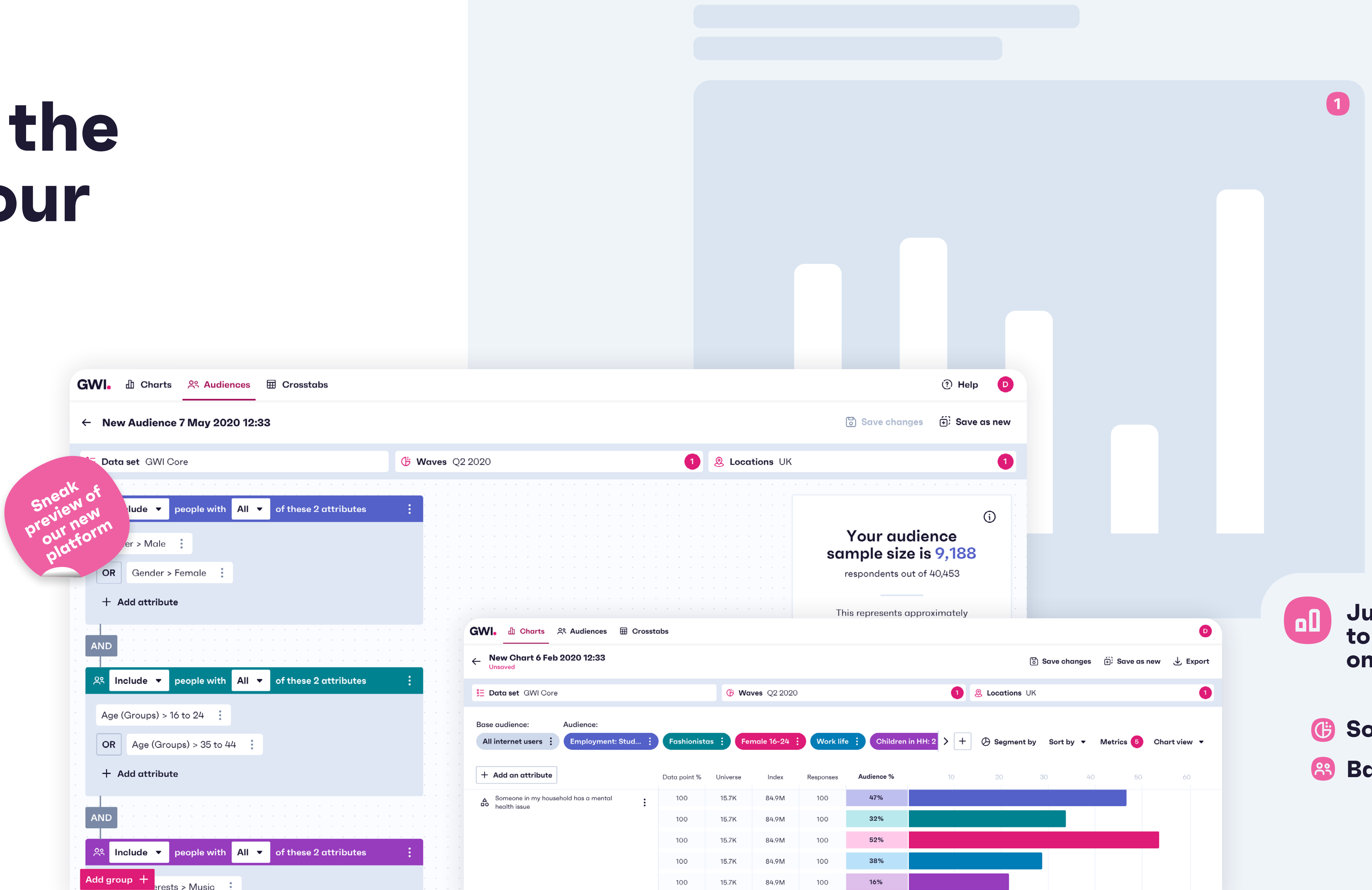
Figures in this report are primarily drawn from GWI Kids, our online research among 19,240 internet users aged 8-15. The survey is fielded in the following 16 markets: Australia, Brazil, Canada, China, France, Germany, Italy, Malaysia, Mexico, Poland, South Africa, Spain, Sweden, Turkey, UK, and the USA. Please note that China and Sweden were added in Q1 2022, and are therefore excluded from all over time comparisons.

GWI Kids represents kids aged 8-15 who use the internet. It does not therefore overlap with GWI Core, which represents internet users aged 16-64 in 48 markets. Though, we do refer back to our Core research for context throughout this report.

Because children who do not use the internet are not represented in GWI Kids, it's important to remember that internet penetration rates vary significantly between the different countries included in the study (from highs of around 90% to lows of around 60%). Because of this, the demographic composition of the online population may look very different from one market to the next.

Discover the data on our platform

Each chart from our ongoing global research in this report contains a hyperlink that will bring you straight to the relevant question on our Platform, where you can investigate all data by demographics, over time, and among your own audiences.



Each of the graphs is numbered

More information can be found in the Appendix section at the end of this report

Just click this icon to explore the data on the platform

Source
Base

Information about the source and base

Key insights

Gen A are embracing the "real" world

This time last year, talking to friends online on weekends was more common than seeing them in person. Today, the reverse is true; plus, our data hints at screen fatigue, with fewer teens favoring subjects like computers/IT since 2021. Instead, there's a bigger emphasis on real-world activities like gym class/sports, which has wider implications for the kinds of entertainment kids are seeking.

Audio and cinema are more appealing than ever

Gen Alpha are coming off the smaller screens. They are increasingly embracing screen-free activities like podcasts or bigger screens like movie theaters. Podcasts specifically have thrived during the pandemic while engagement with the news has faded, suggesting a bigger cultural shift toward audio content could be on the horizon.

Parental supervision is less common while device portfolios grow

Kids are less likely to be supervised than last year on all devices they use apart from tablets and laptops. Parental supervision and control alone aren't enough to keep kids safe online. Third-party solutions are presented with an opportunity to step up in this underserved market to teach and encourage kids to think critically about their digital wellbeing.

TikTok's rapid growth continues

TikTok's now the app teens are most likely to name as their favorite platform – and it's overtaken WhatsApp, Instagram, and Facebook since 2021 in order to get there. Its raw, messy, low-effort aesthetic has made laid-back humor a must-have among Gen Alpha, who will likely place more importance on the creative and audio aspects of campaigns in the future.

Kids are big fans of world-building games

Compared to adults, creation games like *Roblox* and *Minecraft* are higher on Gen Alpha's leaderboard. Unsurprisingly, opportunities for adventure and building are the main qualities they look for. Kids clearly relish what these platforms bring to the table: the chance to think critically, learn new skills, and collaborate. This flings open another door for brands to spark community-based conversation.

01

Gen Alpha after lockdown

How Gen A is doing post-pandemic

Lockdowns were hard on us all, but Gen Alpha has had two formative years stolen from them. Since 2021, kids have grown less worried about not seeing loved ones, falling behind at school, and the future in general. They're showing signs of resilience, but we can't expect them to return to where they were before Covid; their current feelings will surely shape their attitudes as they grow up.

Our **research** shows that adults have become more wellness-oriented over time, and those ideas appear to have trickled down to kids, with 1 in 3 teens describing themselves as health-conscious. This rises to half in countries like Mexico and Spain, which actually trumps the adult figure in these markets. This is partly down to more health **resources** being created with kids in mind, but fears of contagion will also have a lasting impact.

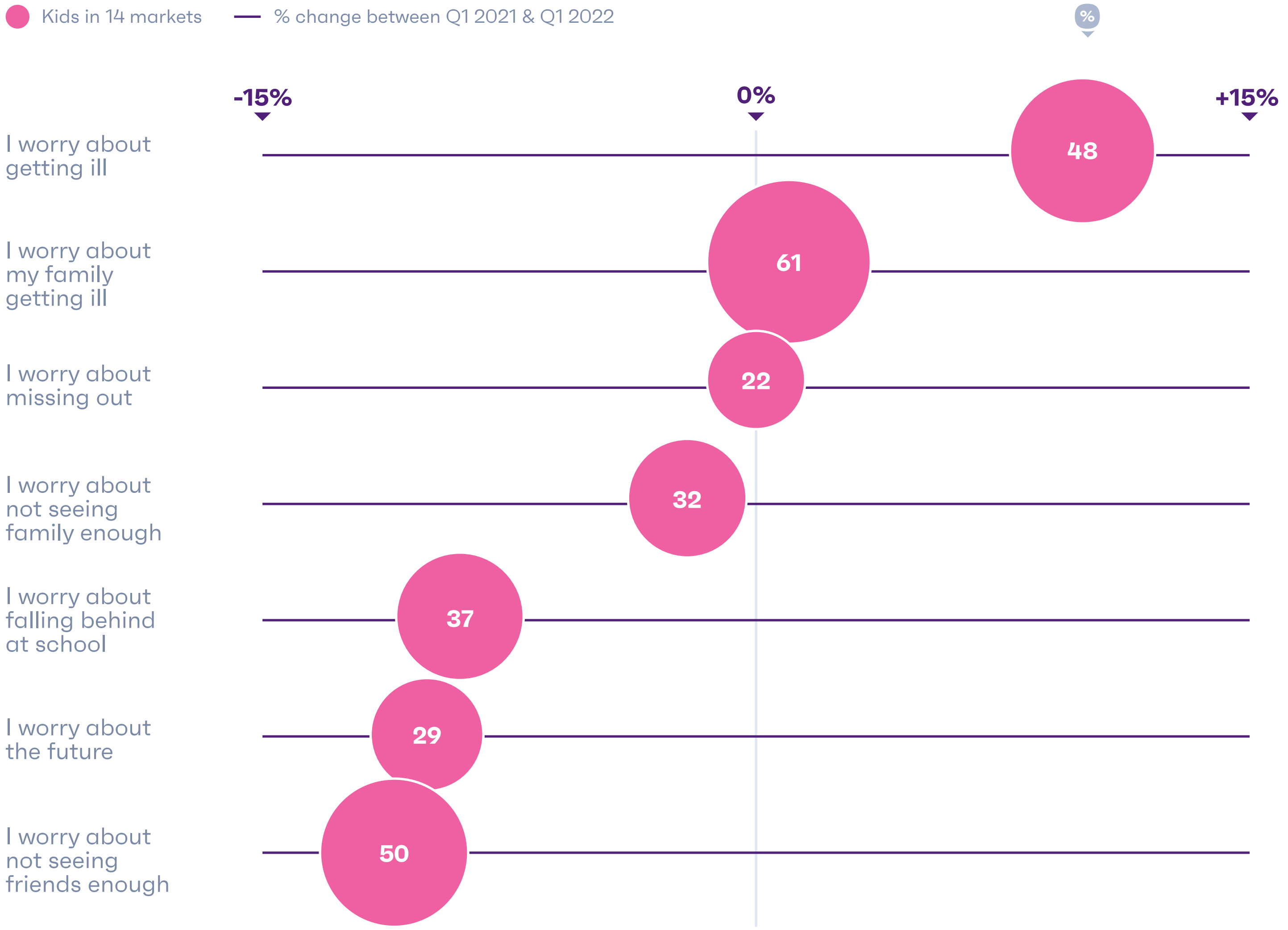
Although **concerns** about falling sick are declining among adults, for Gen Alpha, the opposite is true: there's been a 10% rise in those worried about getting ill since 2021. Family illness is also the number one concern in 12 out of 16 markets. Tools that suggest preventative measures teens can take to safeguard their health will put more at ease. And on the emotional side of things, initiatives that encourage them to open up stand to do a lot of good, given 39% of 12-15s say talking about their feelings is important to them.

The BBC's **news bulletins** are a good model to follow; they let kids know it's ok to be rattled by current media coverage and help them interpret distressing or "fake" news. Similarly, support groups backed by Johnson & Johnson are teaching them good ways to manage their **emotions**.

The future is generally looking a little brighter

1

% in 14 markets who say the pandemic has made them worry about the following (sorted by % change)

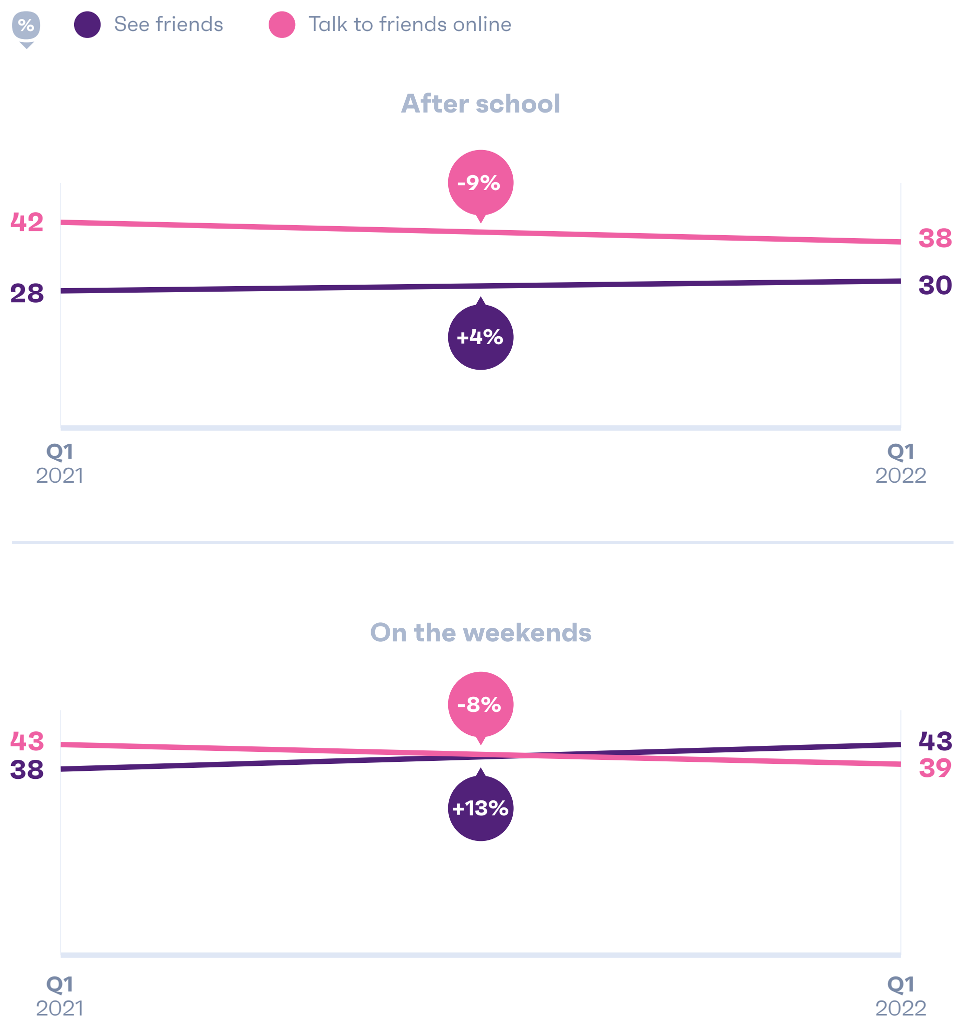


GWI Kids Q1 2022 & Q1 2022   15,418 (Q1 2021) & 16,125 (Q1 2022) kids aged 8-15

More real life experiences, less time online

2

% in 14 markets who say they usually do the following after school/on the weekends



GWI Kids Q1 2021 & Q1 2022

15,418 (Q1 2021) & 16,125 (Q1 2022) kids aged 8-15

Getting back to the real world

Despite their health concerns, Gen Alpha have been quick to embrace their post-Covid freedom and the opportunities to socialize in person. This time last year, pretty much all hobbies and extracurricular activities were shifted to the digital realm, which meant talking to friends online (43%) during the weekend was much more popular than actually seeing them (38%).

Fast-forward to today and we start to notice a shift; Gen Alpha, and especially younger kids, are now more likely to say they see their friends (43%) than talk to them online on the weekend (39%).

This change in online behavior is evident in their device usage too. Despite gadget portfolios growing, parents are actually less likely than a year ago to describe their kids' device usage as heavy (-14% for 8-11s and -7% for 12-15s). A lot of this can be attributed to the end of online education for many – 13-15 year olds are now 12% less likely to do their homework online than last year and 17% less likely to use Zoom, for example. Teens are much less likely to watch educational videos as well (-22% year-on-year). But our data also hints at a broader cultural shift following screen fatigue from the past couple of years. The extent of digital exposure appears to have put kids off tech somewhat.

Ranking of 12-15 year olds favorite subjects at school and their interests

3

Subjects

Q1 2021		Q1 2022
Math	1	Math
IT & Computing	2	Gym class/sports
Gym class/sports	3	IT & Computing
Art	4	Art
Music	5	History

Interests

Q1 2021		Q1 2022
Films/movies	1	Films/movies
Music	2	Music
Games	3	Animals/pets
Animals/pets	4	Games
Computers	5	Holidays/vacations

GWI Kids Q1 2021 & Q1 2022 7,745 (Q1 2021) & 8,496 (Q1 2022) kids aged 12-15

The shifts in teens' interests and favorite subjects at school say a lot here. There's a decreasing enthusiasm for computers/coding across the board and a bigger emphasis on physical or real-world activities. For example, when it comes to their favorite subjects, 12-15s have replaced IT & computing with gym class/sports. Similarly, computers have gone down from 5th to 8th place in their list of interests, with things like holidays/vacations and animals/pets more appealing now. As we're going to explore later in the report, this will have wider implications on the kinds of entertainment they're seeking.

Gen Alpha: digital vs physical balance

% who say they usually do the following after school/on the weekend

See friends | Talk to friends online | %

8-11s

Country	After school: See friends	After school: Talk to friends online	On the weekend: See friends	On the weekend: Talk to friends online
Australia	22	37	44	37
Brazil	20	37	40	37
Canada	23	38	36	41
China	29	31	33	33
France	17	17	35	20
Germany	63	20	66	19
Italy	30	26	47	27
Malaysia	22	24	23	22
Mexico	13	19	21	21
Poland	43	35	47	33
South Africa	34	18	54	22
Spain	31	22	48	27
Sweden	59	30	69	32
Turkey	30	26	40	27
UK	28	36	44	33
USA	29	32	42	38

12-15s

Country	After school: See friends	After school: Talk to friends online	On the weekend: See friends	On the weekend: Talk to friends online
Australia	29	51	46	53
Brazil	25	56	44	54
Canada	32	50	41	49
China	25	43	32	36
France	28	43	43	44
Germany	55	40	63	42
Italy	42	47	61	41
Malaysia	26	40	27	39
Mexico	19	37	26	36
Poland	46	48	56	44
South Africa	27	41	51	47
Spain	35	40	60	45
Sweden	49	58	59	54
Turkey	40	40	48	43
UK	37	53	51	51
USA	35	49	45	49

Growing up with a social conscience

Gen Alphas are what researchers call “**upagers**” – they’re more socially aware at a young age and become consumers more quickly. There are a number of reasons for this.

According to the US **Census**, Gen Alpha will be the most diverse generation in history, and this reality is shaping kids’ expectations. If the success of Disney’s ***Encanto*** wasn’t enough, our data shows that fair representation is already on their minds. Helping people and everyone being treated the same are top of teens’ priority list, and a third already pay attention to diversity in media. Past **research** has also shown that kids are likely to look elsewhere for entertainment when they don’t see themselves being reflected. So, the importance of DEI for businesses is only set to grow.

Gen Alphas aren’t kidding about equality

% of 12-15s who say the following are important to them

5

Helping people	46
Everyone being treated the same	46
Being treated my age	45
Sharing my views/opinions	43
Caring for the planet	38
My family background/culture	33
Seeing all types of people in ads/shows/movies	33
Recycling	28

GWI Kids Q1 2022 10,174 kids aged 12-15

Alphas are maturing in a time of climate emergency, and their attitudes echo this

The same is true of sustainability. Gen Alphas are maturing in a time of climate emergency, and their attitudes echo this: 46% of teens are either interested in the environment or climate change.

But we can't just call them "eco warriors" and be done with it. Among **younger** groups in particular, the **narrative** is changing from one of personal responsibility to one of top-level action. It's likely many Gen Alphas will expect big organizations to do the heavy-lifting on sustainability, and will show loyalty toward those who do. Teens currently rate caring for the planet higher than recycling, which is a sign they're already making distinctions between individual behavior and large-scale goals. The number interested in vegetarian/vegan food has also dropped by 16% since 2021, which could be linked to the above.

This ongoing shift is going to push the spotlight onto big organizations, and various brands are busy preparing for it. **Mattel** has raised the bar by introducing a certified carbon neutral toy range, and we're likely to see many more firsts in the years ahead.

02

TV & audio entertainment

Coming off the (small) screen

Two forms of entertainment stand out in becoming more important to kids since the pandemic – cinema and podcasts. It's hardly a coincidence both of these activities don't involve staring at mobile phones. A shift away from the smaller screens is evident whether that's through screen-free activities like podcasts or via bigger screens like movie theaters.

A quarter of teens say cinemas are their favorite way to watch movies – an increase of 30% in a single year. Clearly the big screen is something Gen Alpha genuinely missed, and their interest was quickly reignited once lockdowns ended. Today, it's almost a third of 8-11s who visit the cinema monthly, and a further 3 in 10 do so every 2-3 months. Teens' enthusiasm for cinemas also stems from the fact that they're quite impatient with movie releases. Nearly 50% of those watching TV say they like to watch movies as soon as they come out, up from 42% in Q1 2021. For Gen Alpha, cinemas are both an escape from the smaller screen, but also a way to avoid spoilers and ensure they're the first to jump on a potential trend.

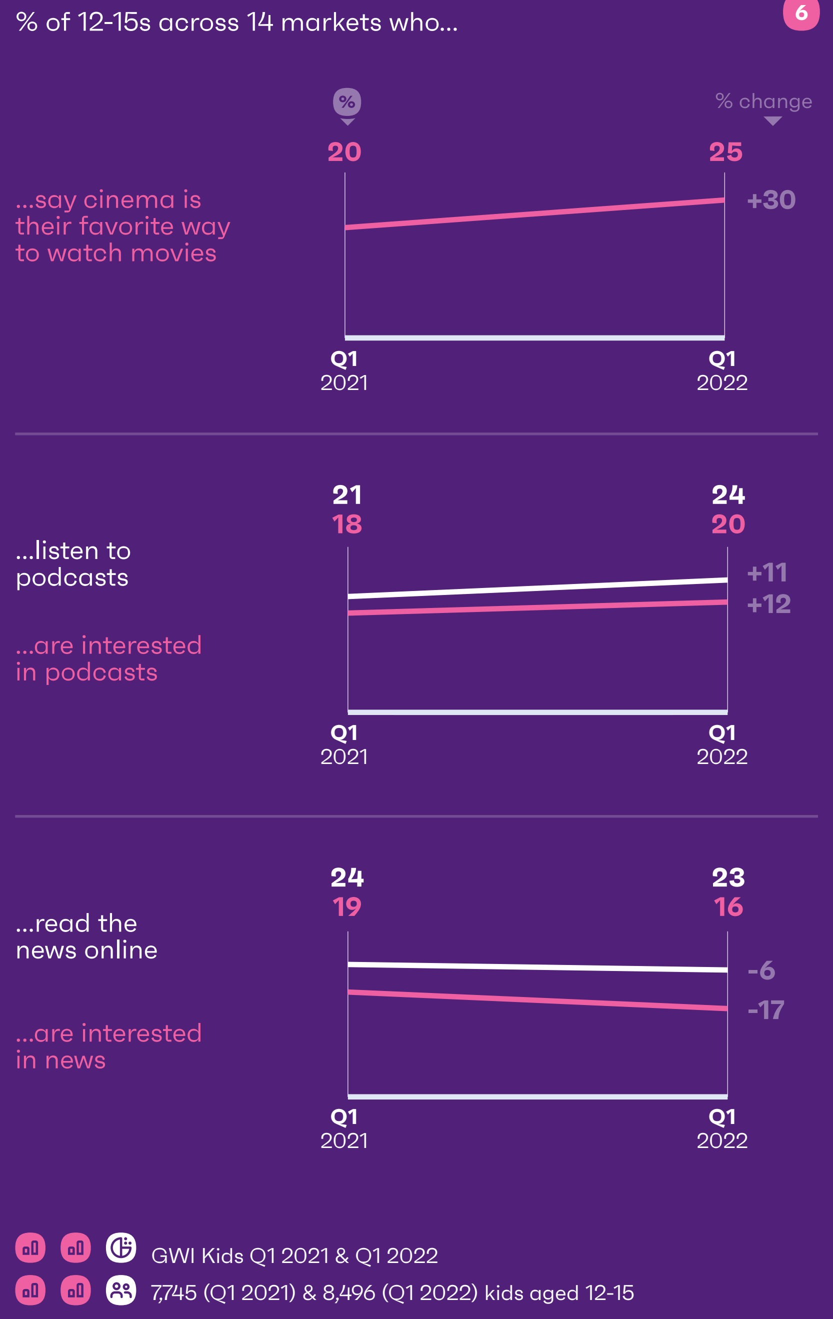
The aftermath of screen fatigue may well be one of the biggest lasting impacts of the pandemic on Gen Alpha

On the other hand, podcasts are the medium Gen Alpha really grew fond of during the pandemic, perhaps as a consequence of the screen fatigue they experienced following online education. The fact that podcasts thrive while interest and engagement with the news fade suggests there could be a bigger long-term cultural shift in favor of audio content. Gen Alpha will likely develop a higher awareness of the effects devices can have on their wellbeing, potentially paving the way for a more audio-centered online future.

Staying informed by listening to podcasts instead of reading the news could be one of the biggest differentiators between Gen Alpha and older generations. As the top trending podcasts genre (+10% year-on-year), interviews are likely to strike the biggest chord going forward. If they haven't done so already, media publishers should start investing in podcasts – not only because teens are increasingly gravitating toward them, but also because of their low barrier to entry.

Need a complete lowdown on the entertainment industry? **Get it all in our entertainment report**

Cinema and podcasts growing at news' expense



Today, kids use an average of 4.2 streaming services (including YouTube)

The rise of feel-good content

Watching TV/movies is also among the top sources of entertainment for Gen Alpha. It's their most popular activity on the weekends (59% say this), and second-most popular after school (50%). Even post-pandemic, films/movies remain teens' biggest interest (69%), while 8-11s rank it just behind animals/pets (70%). It's no wonder streaming platforms like **Disney+** have exploded in the past year, with Gen Alpha 13% more likely to use it compared to 2021. On top of this, half of 12-15s also say they watch a lot of different types of TV shows/movies, suggesting they could influence the number of subscriptions their household pays for.

To help guide streamers and movie franchises to create content that lands, it's important to understand the genres Gen Alpha are getting more into. Shows accompanied by music are increasingly more appealing to them. Younger kids are more likely than last year to watch shows they can dance or sing to, while music is the fastest growing TV genre among teens. We can't overlook a scenario where social media platforms Gen Alpha gravitate toward, like TikTok for example, might be putting their stamp on the types of content kids expect from more traditional channels.

At the same time, content that is sad or serious like drama or soap opera genres have seen dramatic decreases over the past year. It's no wonder that, after two emotionally challenging years, Gen Alpha expect positive vibes from the content they watch.

Cartoons are one to keep an eye on. They have not only increased in popularity among teens in the past year but are also now their second-most watched genre just behind comedy (62% vs 60%). As one of the few genres that managed to stay afloat during the pandemic due to animators being able to keep producing from home, cartoons continue to attract Gen Alpha's attention. In fact, cartoons are currently the most popular genre among teens in Brazil (72%), Malaysia (68%), and South Africa (74%), suggesting the full potential is still untapped.

Trending TV genres

% of 8-11s* in 14 markets who say they watch TV shows that...(sorted by % change)

	%	% change since Q1 2021
I can dance to	33	6
Are about cooking	26	4
I can sing to	32	3
My siblings watch	27	-6
Are about sport	30	-8
Are sad or serious	5	-13

% of 12-15s* who watch the following TV shows (sorted by % change)

	%	% change since Q1 2021
Music	50	8
Cartoons	60	6
Science/nature	42	4
Drama	32	-10
News/current affairs	23	-11
Soap operas/telenovelas	22	-16

*Based on kids who watch TV

GWI Kids Q1 2021 & Q1 2022 15,237 (Q1 2021) & 15,925 (Q1 2022) kids that watch TV aged 8-15

Top streaming services by market

% of 8-15s who watch clips, programs, or movies on the following services

GWI Kids Q1 2022 | 19,007 kids who watch TV aged 8-15 | 8

Australia	%
Netflix	78
YouTube	77
Disney+	46

France	%
YouTube	74
Netflix	67
Disney+	29

Mexico	%
Netflix	87
YouTube	81
Disney+	58

Sweden	%
YouTube	91
Netflix	81
SVT Play	54

Brazil	%
YouTube	87
Netflix	82
Disney+	45

Germany	%
YouTube	78
Netflix	59
Amazon Prime	49

Poland	%
YouTube	86
Netflix	65
Cartoon Net.	26

Turkey	%
YouTube	84
Netflix	62
Cartoon Net.	56

Canada	%
YouTube	76
Netflix	75
Disney+	51

Italy	%
YouTube	74
Netflix	58
Amazon Prime	58

South Africa	%
YouTube	76
Netflix	69
Cartoon Net.	62

UK	%
Netflix	79
YouTube	74
Disney+	52

China	%
Tencent Video	72
iQiyi	66
Youku	48

Malaysia	%
YouTube	85
Netflix	56
Cartoon Net.	52

Spain	%
YouTube	74
Netflix	70
Amazon Prime	58

USA	%
Netflix	73
YouTube	72
Disney+	61

03

Protecting kids online

More time online means less supervision

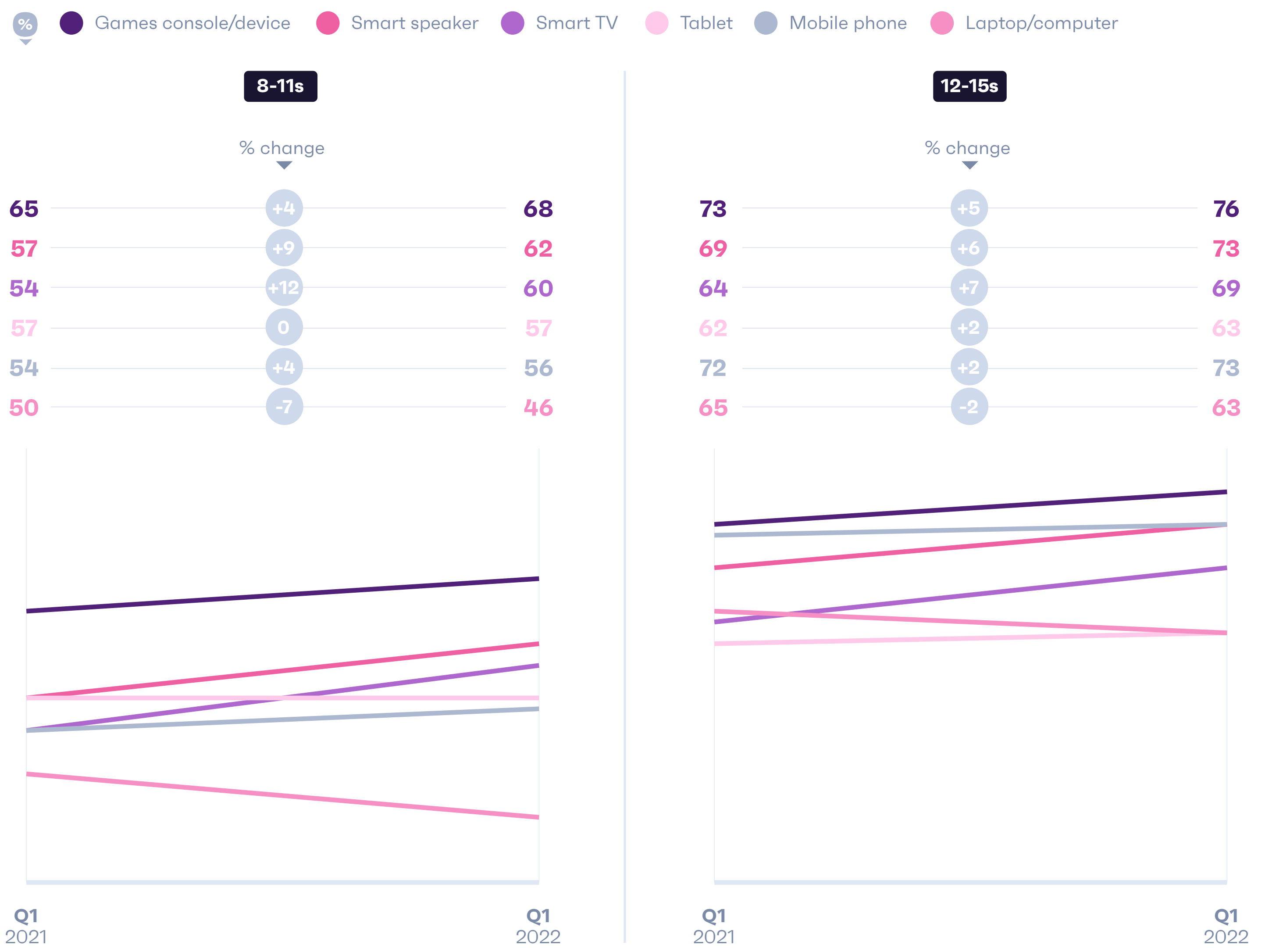
Electronic devices and online spaces were instrumental in keeping kids connected, occupied, and entertained during lockdowns over the past couple of years. Platforms like *Roblox* and Discord, for example, managed to shrink the physical distance between kids and provide escapism in the virtual world, while **empowering** parents to use the suite of parental control settings. As a result though, mobile phones have now replaced TVs as 8-11s' most used devices (33% vs 30%).

Inevitably, as device portfolios grow and more kids have access to smaller screens, parental supervision becomes less common. Our data shows kids are less likely to be supervised than last year on all devices apart from tablets and laptops. But games consoles are the devices where kids from both age groups are least supervised – 68% of 8-11s and 76% of 12-15s use games consoles without supervision. There could be a gap in the availability and/or awareness of safety software solutions for these devices.

Parental supervision decreases as device portfolios grow

9

% in 14 markets whose parents say their kids use the following devices unsupervised*



GWI Kids Q1 2021 & Q1 2022 15,418 (Q1 2021) & 16,125 (Q1 2022) kids aged 8-15 *Figures are based on users of these devices

We can see a similar story when it comes to how much decision-making power kids have over what apps they can download. Put simply, the more time they spend online, the more autonomy they have over what, or how much, content they're exposed to. Over half of 12-15 year olds who decide for themselves what apps they can download are classified as heavy online users by their parents, compared to 22% who are light users.

The bottom line is parental supervision and control alone isn't enough to keep kids safe online, especially when most online spaces are designed with adults and not kids in mind. The responsibility shouldn't lie on parents alone; software companies have a role to play as well. Third-party solutions are presented with an opportunity to step up in this underserved market to teach and encourage kids to think critically about their digital wellbeing. **Interland**, a game created by Google, can serve as an inspiration. It's an online adventure aiming to educate kids about digital safety by presenting them with four challenging games – each focusing on a different online safety pillar.

Designing gamified and educational experiences with today's youth in mind should be a priority in a world where 41% of 8-11 year olds say they use a phone, tablet, computer, or games console every day.

The opportunity in parental controls software

When it comes to privacy measures, parental approaches differ widely depending on how old the child is. Parents of 8-11 year olds are much more likely to be hands-on and use parental control solutions (51% vs 39% for teens), or monitor any websites or apps their kids use (43% vs 33%), compared to teens. Filtering potentially damaging content is also something parents have been more focused on in the past year. They've been restricting and adding pin numbers for certain content more (+5% and +9%, respectively), suggesting a potential opportunity for new software solutions to enter this space.

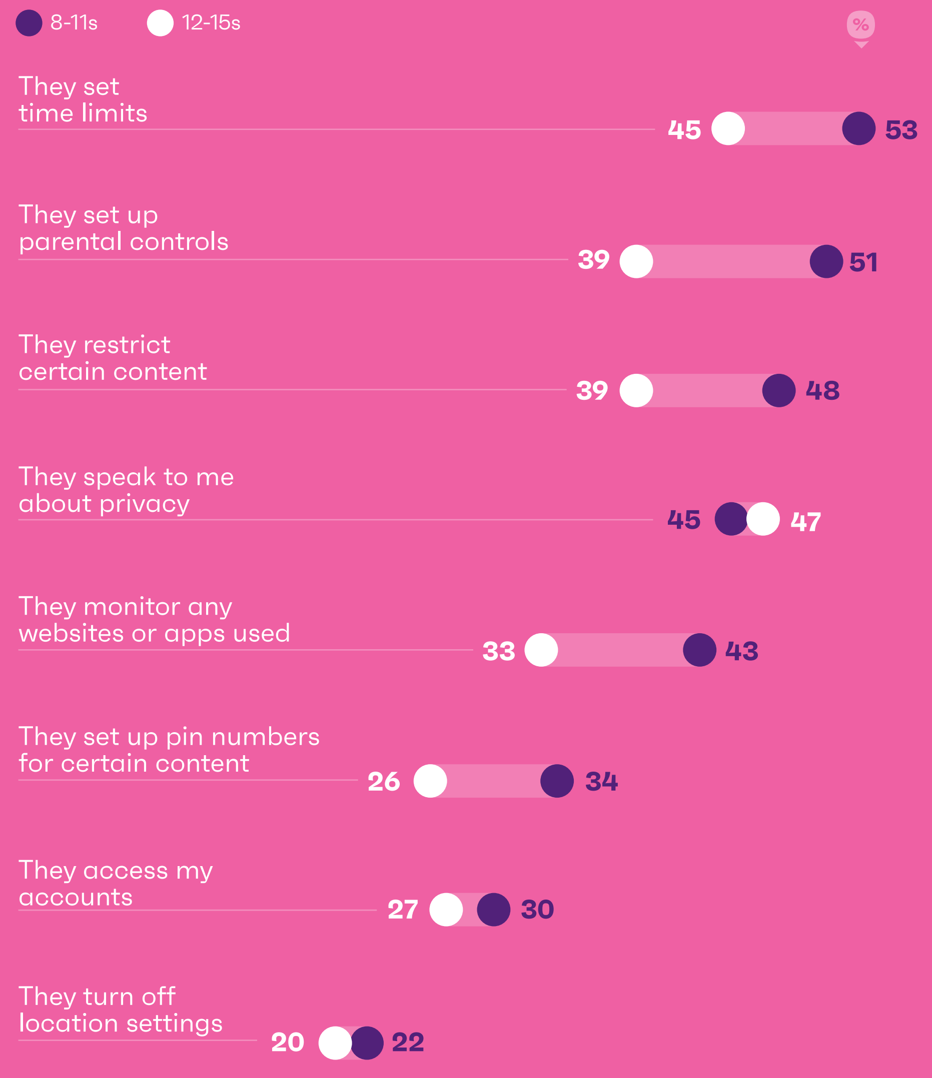
In fact, the parental controls market is **projected** to reach $2,454 million by 2029 – a 123% growth on 2022's figure. Some markets might be more receptive than others to these types of software. For example, among 8-11s, parental controls are most important in Canada (60%), Italy (48%), South Africa (71%), Turkey (59%), the UK (69%), and the US (60%); while speaking about privacy tops the charts in Australia (72%), Mexico (66%), Poland (65%), and Sweden (74%). Among 12-15s, speaking about privacy takes the lead in all markets but China and Malaysia, suggesting online courses and books might be better-placed for teens. In China, solutions can focus on time limits more, while in Malaysia monitoring software is likely to be better received by parents.

But even with parental controls in place, it's still questionable how much effect these tools have when it comes to kids' actual frequency of going online or their social media usage. Compared to the average teen, those whose parents set time limits are only slightly less likely to say they go online every day (51% vs 47%). Similarly, they're pretty much as likely to have at least 3 social media accounts (85% vs 84%). Teens whose websites or apps are monitored are also just as likely as the average to say they talk to people they don't know in real life (26% vs 25%). There's clearly a need for Big Tech, social media companies, and ultimately legislation to ensure that kids are always safeguarded online.

Parental control solutions are especially popular for younger kids

% of kids in 16 markets whose parents say they do the following to protect their child's privacy online

10



GWI Kids Q1 2022 19,240 kids aged 8-15

04

Social media and commerce

Seeing the world through TikTok

To many people, TikTok represents the future of social media and entertainment. Its popularity isn't set to level off anytime soon, as it keeps seeing explosive engagement figures year-on-year (+18%). It's now the app 13-15s are most likely to name as their favorite platform (1 in 5 do) – and it's overtaken WhatsApp, Instagram, and Facebook since 2021 in order to get there.

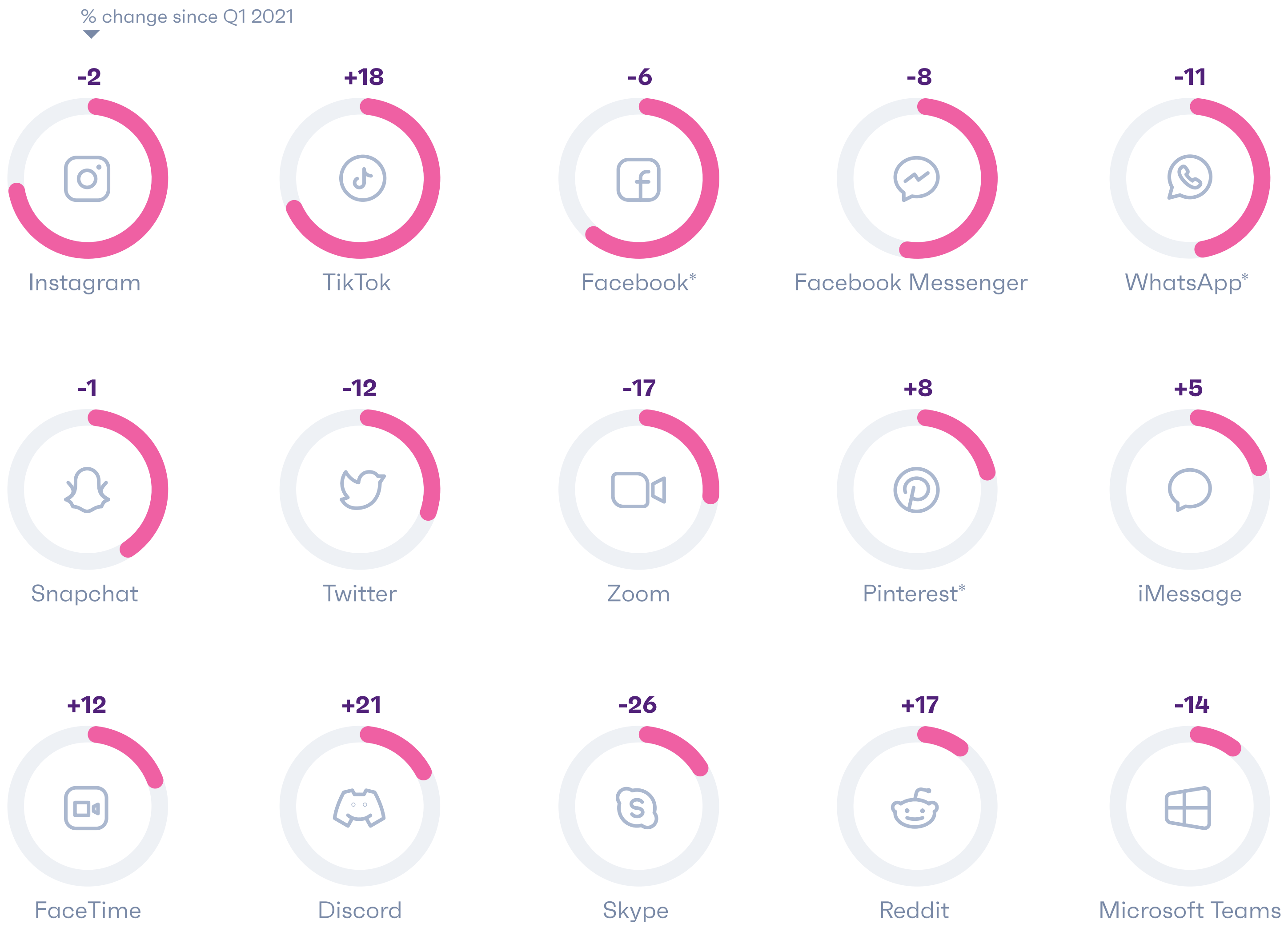
TikTok's aesthetic is raw, messy, and low-effort; and it's influencing kids' content expectations. Compared to other teen social media users, TikTokers are more likely to use platforms to find funny posts, and to say that social media makes them feel good about themselves. While glamour still has its place, laid-back humor is stealing the show among Gen Alpha. This generation will likely place more importance on the creative and audio aspects of campaigns – seeing as TikTok users over-index for using social media to do things like learn new dances, hear new music, and get style inspiration.

Tight-knit communities are also changing ideas and preferences. Discord and Reddit are two of the three fastest-growing platforms among teens right now, and can both be described as "**digital campfires**" – spaces where people with shared interests gather.

If Gen Alpha is anything to go by, community-led content will be on brands' minds a lot more in the future. Discord users are much more likely to use platforms to follow/talk to people like them, so delivering customized content should always be the focal point when using these "campgrounds". Brands already linked to specific fandoms are an excellent fit, but all those taking part will need to go the extra mile to ensure **communication** feels personal, that any potential spam is reviewed, and that they're quick to set the tone of the server.

More micro-communities, less video chat

% of 13-15 year olds in 14 markets who say they've used the following in the last week



*select markets only

GWI Kids Q1 2021 & Q1 2022 5,784 (Q1 2021) & 6,365 (Q1 2022) kids aged 13-15

41% of Discord users feel they can say what they really think on social media

Satisfying kids' content cravings

Academic **research** shows kids start relating to and even preferring brands to others as early as three. So, getting company values across now will lay the groundwork for lifelong bonds. Though, brands can't look at Gen Alpha through a standard consumer lens.

Just like adults, teens' most common reason for logging onto social networks is talking to loved ones, but their content preferences stand out in a number of ways. Adults' second and third top reasons for using social media are filling up spare time and finding news stories. Among teens, finding funny posts, looking at memes, and hearing new music all rank above filling up spare time, and place miles ahead of reading the news. It's likely that tomorrow's consumers will see social media less as a place for getting their daily updates, and more as a space for self-expression and humor.

Ultimately, Gen Alpha's ideal online culture is unique, and brands will need to make content tweaks to earn their loyalty and make it stick. Alongside memes, seeing what's trending and talking about TV are also high on teens' list, which highlights the value of referring to pop culture. This varies a little by platform. For example, seeing what's trending is on par with looking at memes among Twitter users, and sharing information on causes they care about is more important to Redditors. But funny and relatable content will resonate across the social media spectrum.

Stay in the know about social. **Here's your ultimate guide to 2022 trends**

What kids' ideal online culture looks like

% of 12-15 year old social media users who say the following are the main reasons they use platforms

12

	%
Finding funny posts	49
Looking at memes	43
To hear new music	40
Seeing what's trending/being talked about	38
Talking/finding out about TV shows or movies	34
Following/talking to people like me	32
Following celebrities/influencers	29
Seeing posts from my favorite brands	28
Watching live streams	28
Reading the news	23
Finding things I want to buy	23
Sharing information on causes I care about	22
Reading reviews	21
Getting style inspiration	20

GWI Kids Q1 2022 9908 social media users aged 12-15

Changes in the social space

Social media continues to flourish, even now most Covid restrictions have been lifted. This time last year, using social media was Gen Alpha's fifth most popular thing to do after school, and fourth on the weekend; it's now moved up a spot on both leaderboards. Plus, there's been a 38% rise in kids saying they spend the most time on social media after school, and a 43% increase on the weekend. Usage isn't the only thing that's shifted over time, though; the mood has also changed slightly.

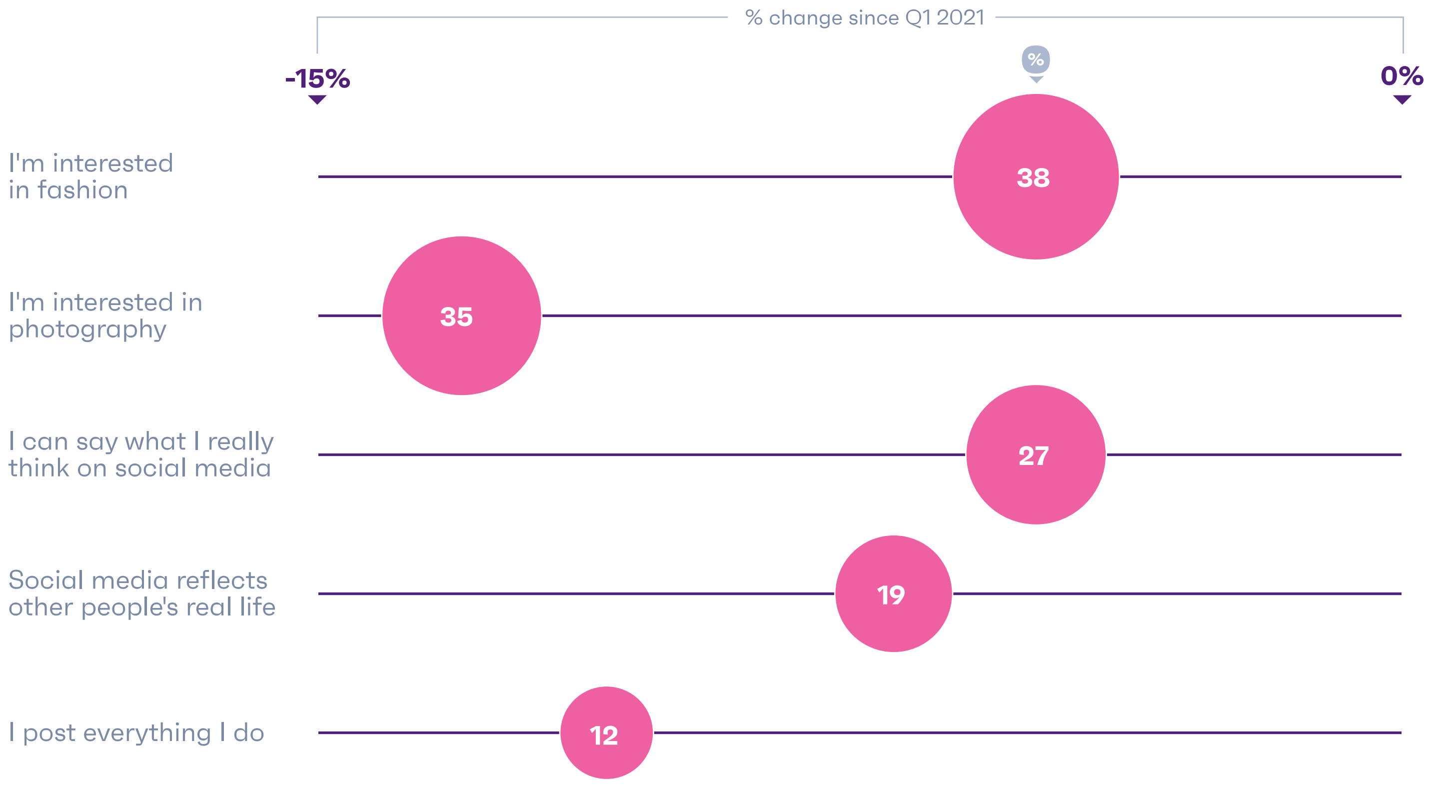
With a lot of sad updates in the press, many adults are turning off the **news**. In a similar vein, reading the news, sharing information about important causes, and posting opinions on social media are all down among kids. Unlike their parents, kids have a very diverse stream of potential news channels, which could drive them to want to keep some news-free.

Today's kids are also growing up in a world where movements and legislation around body editing on social media are widespread, and many are **taught** ways to deal with the pressure to look a certain way from a young age. We've observed more demand for a laid-back vibe on social media among adults, but Gen Alpha's likely to be even more committed to keeping this environment open, authentic, and carefree. Various companies are on the ball and have already revised their influencer marketing **policies** in order to future-proof their brand.

And they're right to do so, as teens' attitudes continue to change over time. Their passion for fashion and photography has dipped, and we've seen a clear drop in the number of teenage boys saying they care about what people think of their profiles (-9%). By the same token, fewer social media users post everything they do or feel like they can say what they really think on feeds, which explains why more are leaning on platforms that host micro-communities.

The vibe has changed on social media

% of 12-15 year old social media users in 14 markets who agree with the following



GWI Kids Q1 2021 & Q1 2022 7,522 (Q1 2021) & 8,257 (Q1 2022) social media users in 14 markets aged 12-15

The art of not taking things too seriously

13

Based on the % change, since Q1 2021, in teen social media users saying the following are why they use platforms

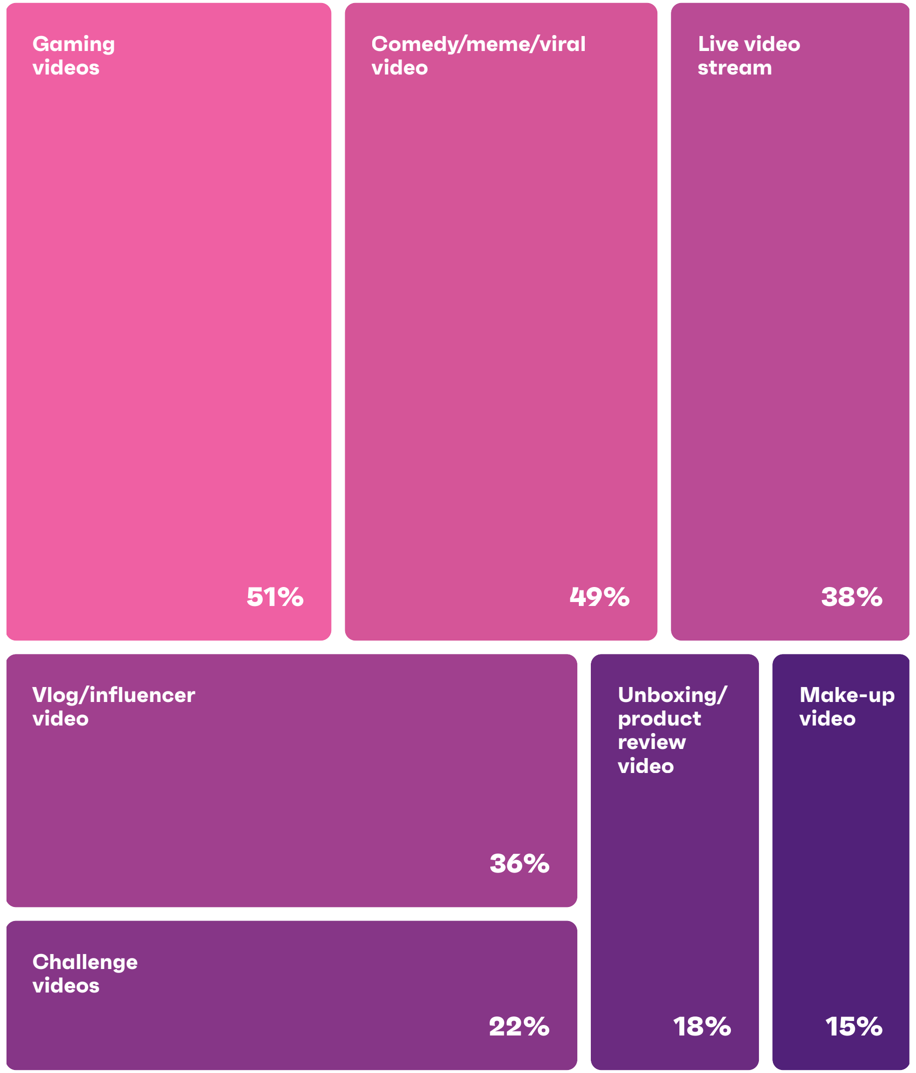
Top increases	%
Looking at memes	+6
To avoid missing out	+6
Seeing what's trending	+5
Finding funny posts	+5
Learning new dances	+5

Top decreases	%
Reading the news	-11
Posting my opinions	-10
Reading reviews	-7
Meeting new people	-7
Sharing information on causes I care about	-7

How word-of-mouth happens on social media

% of 12-15 year old social media users who say they've watched the following online in the last week

14



GWI Kids Q1 2022 · 9,908 social media users aged 12-15

What brands can learn from kidfluencers

Various kidfluencers have relatively big and devoted fanbases, and it's easy to see why. Teens are more likely to say they use social media to follow influencers than brands, which bucks the general trend and highlights the value of brand-creator partnerships. Compared to adults in these markets, teens are also more likely to watch vlogs/influencer videos weekly (35% vs 25%), as well as comedy/meme videos (48% vs 32%), and livestreams (38% vs 31%).

The DIY nature of sites like YouTube and TikTok win many over, as they allow everyone to take part in the creator economy. A study by UK regulator **Ofcom** found that a number of kids preferred YouTube to apps like Netflix simply because they're "made by normal people", which offers a lesson to brands and influencers; kids are keen to see down-to-earth moments, alongside pre-planned ones.

Compared to other social media users, teens who watch unboxing videos are 31% more likely to believe other people's posts reflect their real lives, a sign that being an open book tends to improve viewer-influencer relationships. Famous kidfluencers like Anastasia Radzinskaya and Ryan Kaji support this idea. Ryan's well-known **unboxing video**, which sees him open a giant egg with car toys inside, currently has over a billion views; and its low production value is arguably what makes it so good. As Ryan's mom **points** out: "We don't really do multiple takes", "what I get from him, that's what I'm going to use."

Brands need to show they engage with and are run by "normal people" in order to speak to Gen Alpha. There are so many ways they can do this; they can send their products to relevant reviewers, share videos of employees having fun, or highlight great material that's already out there. Many have also latched onto current trends by creating or participating in **challenges**, which is a smart move as over a fifth of teens watch this kind of content weekly.

How Gen Alpha are with money

Money is tight right now, with a lot of us budgeting more due to inflation. And it's not just changes in adults' spending habits that are likely to rub off on kids; many parents are using new finance tools to teach them about money.

Around a third of teens have a bank account they can access. This peaks in Sweden (74%), and drops to 9% in Italy. There's huge market variation, but overall, the number who fall into this category has increased by 7% since 2021. Bank cards that double up as financial education apps are very popular. **Go Henry**, for example, aims to inspire a lifetime of financial wellbeing by giving kids the chance to earn, save, spend, and invest under their parent's watchful eye. Reports also suggest kids are managing pretty well. In 2021, **Gen Alphas** with access to fintech company Greenlight's app handled an average of $204 that year, and collectively saved more than $225 million.

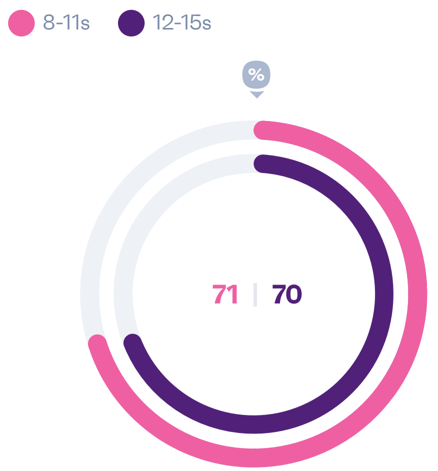
Younger generations are already rejigging financial markets. In **the US**, they're not only more likely to seek advice before making decisions about money, but also to say they plan on buying stocks/shares or investing in crypto. And, with such early introductions to fintech tools, Gen Alpha are on course to disrupt these markets further.

05

Gaming and the future of the metaverse

Gaming frequency

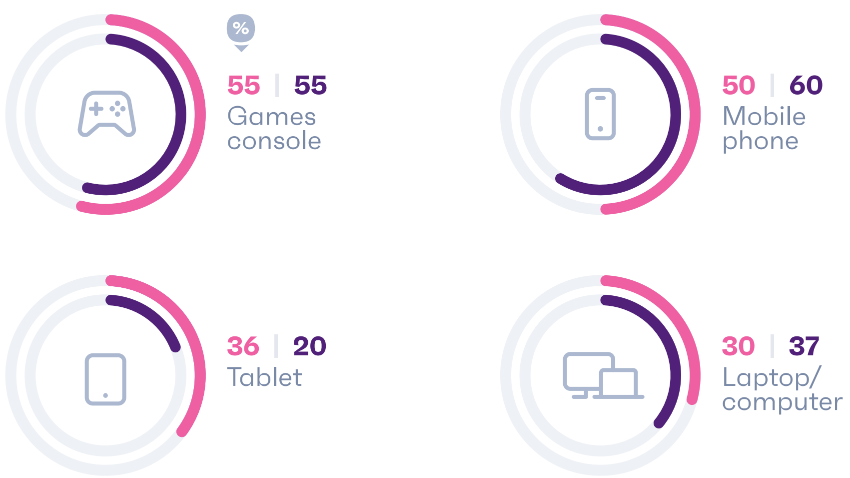
% of gamers (outside China) who say they play every day/most days



Kids' device preferences

15

% of gamers in each group (outside China) who say they play on the following devices



GWI Kids Q1 2022 14,080 gamers outside China aged 8-15

A look at Gen Alpha's gaming portfolio

Kids might be embracing the return of in-person activities, but they continue to spend much more time in the virtual world than most of us did at their age. And gaming is a dominant part of their digital lives. Outside China, over 1 in 4 kids say playing video games is what they spend the most time doing on weekends, which ranks ahead of watching TV/movies (18%), using social media (14%), and talking to friends online (6%). And regardless of the day of the week, you're more likely to find kids playing video games than seeing friends.

Compared to last year, the number of teen gamers playing daily (-5%) has fallen a little; the same is true of watching esports (-6%). But these drops are unlikely to weaken the industry, given how wide its reach is: outside China, the majority of 12-15s are gamers (81%), and this group tends to play at least most days (70% do).

And kids don't just stand out because of their high levels of engagement; their behaviors hint at continued change for the industry. Among adults, smartphones and PCs/laptops rank ahead of consoles by some distance. Among teens, the gap is much smaller, and PCs fall behind consoles. Many Gen Alphas don't have access to a smartphone, which is largely why 8-11s' device of choice is consoles for the time being. Though, there's a chance some of these behaviors will last and reshape the gaming landscape. In fact, the number of kids playing on consoles (+9%) has gone up since 2021, while the percentage using desktops has shrunk (-10%).

Some markets stray from these wider trends a little. For example, China's teens have the lowest monthly engagement figures (54%), as its government limits young gamers to **60 minutes** per day. Also, emerging markets like China and Malaysia mostly game via smartphone, and under-index a lot for using consoles. But on the whole, with more kids being interested in gaming (58%) than TV shows (55%) or sport (46%), it's clearly a very culturally important outlet for Gen Alpha – one that'll be a crucial channel for brand engagement going forward.

To many kids, gaming is about creating

Kids' franchise favorites mirror what they want from games; they also contrast with other generations. Adults prefer shooter and action adventure games, with *Call of Duty* and *FIFA* leading the pack. Their main reasons for **gaming** are ultimately to have fun, to pass the time, and to relax.

Meanwhile, kids are coming of age at a time when games like *Roblox* and *Minecraft* are well-established platforms, rather than disruptors. These games not only top Gen Alpha's leaderboard, they're growing more popular over time. *Roblox* has made the biggest jump, moving from 5th to 2nd place in the rankings since 2021. These games share some similarities; they both let players build worlds and go on adventures with others, and they've helped frame what kids want from gaming experiences.

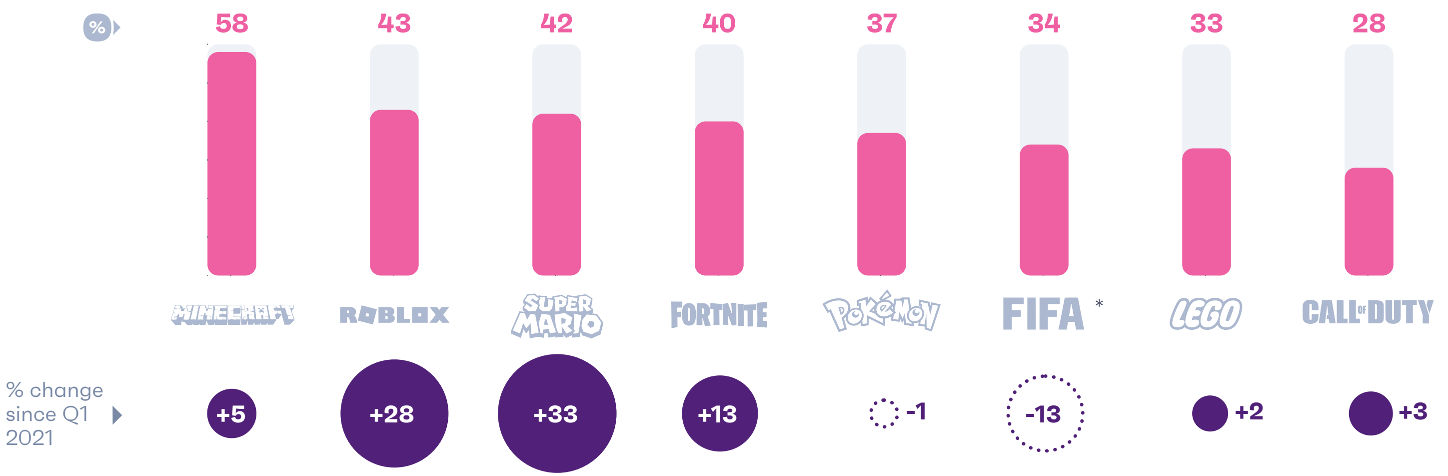
Opportunities for adventure and building/creating are the main qualities young players look for. Demand for the latter has also climbed by 7% since 2021, and we've seen an equal rise in the number of teens playing simulation games (e.g. real-life, building) within this timeframe. Kids clearly relish what these platforms bring to the table: the chance to think critically, learn new skills, and collaborate with others.

For brands, Gen Alpha's appetite for world-building games has flung open another door for community-based conversation. Compared to other 12-15s, *Minecraft* users are more likely to describe themselves as creative (+20%), social (+11%), and to say they use online social spaces to interact with brands (+27%). So, it's not just about meeting kids where they are and sparking conversation; these spaces allow brands to speak to a smaller, more engaged crowd and feed their appetite for self-development. **UEFA**, for example, has picked *Roblox* as the spot for its educational series. Alongside skills challenges, it aims to teach kids about soccer and shine a light on women's tournaments; and this example is probably just the tip of the iceberg.

Get to know Gen Z too. **Here's your global guide**

The trendiest of gaming titles

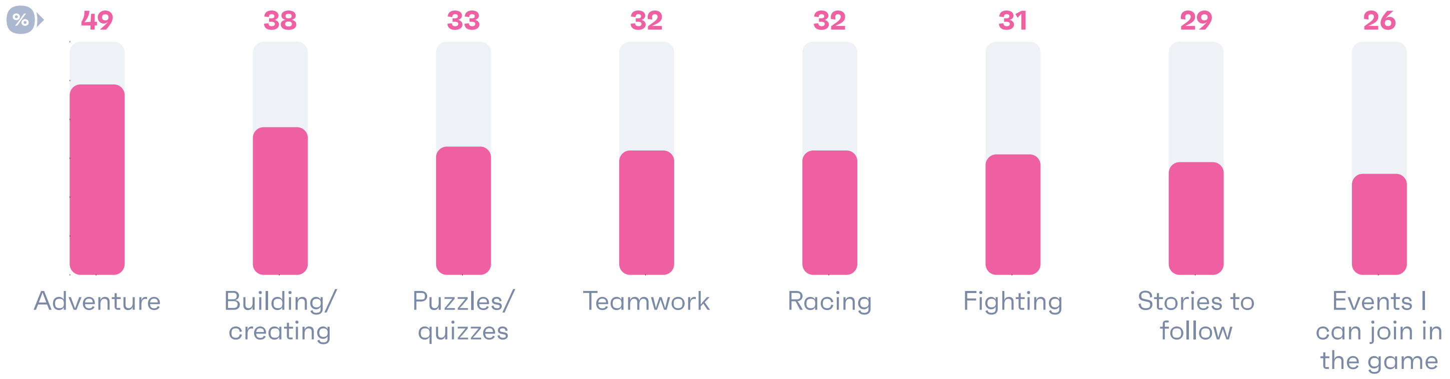
% of gamers in 14 markets who have played these games/played them in the last month



*select markets only

The more creativity, the better

% of players who want video games to include the following



GWI Kids Q1 2021 & Q1 2022 13,114 (Q1 2021) & 13,282 (Q1 2022) gamers aged 8-15

Games are already social hubs for next-gen consumers

Virtual social spaces aren't anything new – think *Second Life* or *World of Warcraft*. But the **metaverse** has been described by Mark Zuckerburg as the "next evolution of social connection", a concept that has Gen Alpha's name written all over it.

Today's kids are a focal audience for brands eyeing up opportunities in the metaverse, partly because they're already enthusiastic about in-game socials. Playing with friends is more common than playing alone, especially among 12-15s. More importantly, it's the general preference among kids, with under a fifth saying they'd rather play alone than with others. With ***Roblox*** having been described as the "most social ecosystem on the planet", Gen Alpha's experience with creation systems has not only sparked their imagination, but also prompted them to crave social interaction while playing: 48% of teen players want games to include either teamwork or events, rising to 56% among *Minecraft* users.

> While business leaders are speculating about the metaverse, our kids are already living in it

TINA MULQUEEN
CEO OF KINDRED MARKETING COMPANY

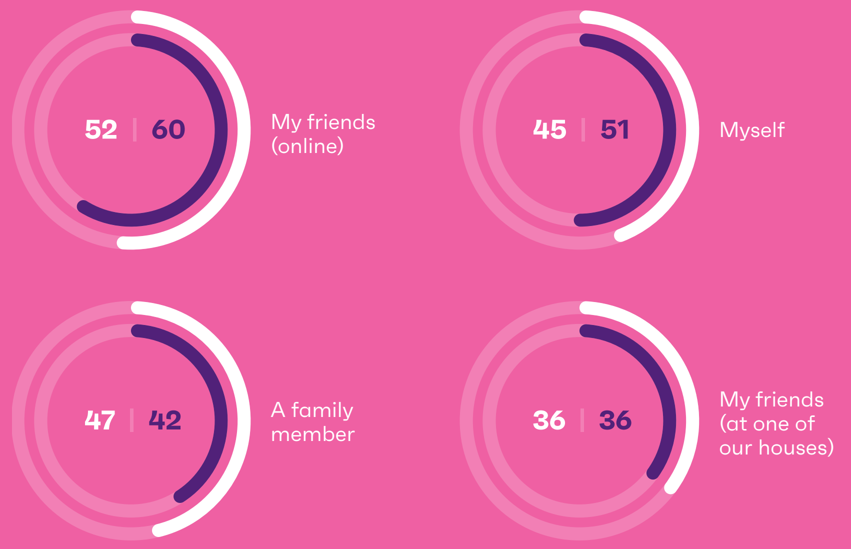
Many Gen Alphas like the social side of gaming

17

% of gamers in each age group who agree with the following

Gaming with friends is super common

% of gamers in each age group who usually play video games with the following



GWI Kids Q1 2022 15,240 gamers aged 8-15

As we've mentioned, kids have grown tired of the pressure to look perfect online. Lockdowns drove them to stare at their reflections more, causing what some call "**Zoom face**". Avatars offer a way around this: allowing kids to express their identity online, without being made to feel self-conscious. Our recent Zeitgeist study shows that 82% of adult gamers would rather be themselves than a persona when spending time online, whereas kids seem to be more enthusiastic about the latter: 29% say they like playing games as someone else, rising to a third among *Roblox* users.

Like players, brands will need to carefully map out their avatar, and prioritize customization settings when building a metaverse, as these characters underpin the social experience. Vans' ***Roblox*** offering shows how brands might design these spaces; it offers a huge skate park where users can mingle, take on challenges together, and fashion their own gear/skateboard. Ultimately, brands will need to have kids' online needs in mind when they contribute to these virtual worlds, as they keep pace with and inspire the evolution of tomorrow's metaverse.

Appendix

1. Has the coronavirus/COVID-19 pandemic made you worry about any of these things?

2. What do you usually do after school? • What do you usually do on weekends? (Saturday/Sunday) •

3. What is your favorite subject at school? (12-15 Only) •Which of these are you interested in? (12-15 Only)

4. What do you usually do after school? • What do you usually do on weekends? (Saturday/Sunday)

5. Which of these things are important to you?

---

6. What is your favorite way to watch movies? (Cinema/Movie theater) • Which of these do you listen to? (Podcasts) • Which of these are you interested in? (News, Podcasts) • In the last week (last 7 days), which of the following have you done online? (Read the news)

7. I like to watch TV shows that… / I like to watch TV shows that are about… • What sorts of TV shows do you watch?

8. Do you watch clips, programs or movies using any of these?

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9. Asked to Parents/Guardians. Which of the following device(s) can the child taking this survey use unsupervised?

10. Asked to Parents/Guardians. Which of the following do you do to protect your child's privacy online?

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11. Which of these have you used in the last week?

12. What are your main reasons for using social media?

13. Which do you agree with about social media? Which of these are you interested in? • What are your main reasons for using social media? Which of these have you used in the last week? (Last 7 days)

14. In the last week (last 7 days), which of these have you watched online?

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15. I play video games… (8-11 Only) / How often do you play video games? (12-15 Only) • I play video games on a… (8-11 Only) / What have you played video games on in the last month? (12-15 Only)

16. Have you ever played these games? (8-11 Only) / Have you played any of the games listed below in the last month? (Last 30 days) (12-15 Only) • When I play video games, I like them to have… (8-11 Only) / What do you like your games to include? (12-15 Only)

17. Which of these do you agree with about video games? • When I play video games I am normally playing against… (8-11 Only) / Who do you usually play video games with? (12-15 Only)

Notes on methodology

Introduction

GWI Kids explores the attitudes and behaviors of internet users aged 8-15 across 16 markets globally. This is done by interviewing both children and their parents/guardians, providing a complete picture of a child's actions and opinions as well as the context in which they live.

Our research

GWI Kids has been meticulously designed so that all questions are mobile friendly, and easy to understand. This means that there are no grids or long lists, which could easily lead to respondents getting confused or fatigued. The survey can be taken on the device the respondent feels most comfortable using, PC/Desktop, Laptop, Mobile or Tablet. The majority of questions are asked to all children, but some are asked differently to 8-11 years olds and 12-15 year olds respectively. The questions asked to younger respondents tend to be simpler and contain fewer options.

Additionally, age appropriate options are provided for each age group. We have a number of checks in place to ensure that the questions are being answered by the child in question, rather than by a parent/guardian on their behalf. We also employ routing to ensure that respondents are not asked questions which would be irrelevant to them. For example, if someone says they do not use any social networks, then they are not asked follow-up questions about this behavior.

Our quotas

To ensure that the GWI Kids sample is representative of the children aged 8-15 who use the internet, we set quotas on age and gender. These quotas are interlocking, meaning they are broken down into subgroups such as "Males 8-11".

Sample size by market

This report draws insights from GWI's Q1 2022 wave of research across 16 countries, with a global sample of 19,240 respondents.

Australia	1,010
Brazil	2,094
Canada	997
China	2,112
France	1,005
Germany	1,000
Italy	1,000
Malaysia	1,000
Mexico	1,007
Poland	1,000
South Africa	1,000
Spain	1,002
Sweden	1,003
Turkey	1,004
UK	1,000
USA	2,006

Internet penetration estimates among 8-15s 2021

GWI Kids represents children aged 8-15 who use the internet. It does not therefore overlap with GWI Core, which represents internet users aged 16-64.

Because children who do not use the internet are not represented in GWI Kids, it's important to remember that internet penetration rates vary significantly between the different countries included in the study (from highs of around 90% to lows of around 60%). Because of this, the demographic composition of the online population may look very different from one market to the next.

Where a market has a high internet penetration rate, its online population will be relatively similar to its total population. However, in markets with a lower internet penetration, those who do use the internet tend to be more urban and affluent than those who do not. This will be reflected in the GWI Kids sample; as such, the results shown in our platform will represent the mindsets, and contexts, of children who have access to the internet.

Internet penetration rates (GWI's Forecasts for 2020 based on 2018 ITU data)

The table is derived from data sourced from national censuses and international organizations, forecasted and adapted by GWI to fit the relevant age group.

	%
Australia	98
Brazil	86
Canada	99
France	97
Germany	99
Italy	87
Malaysia	97
Mexico	77
Poland	98
South Africa	73
Spain	98
Turkey	77
UK	97
USA	98

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countries

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brands

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