

## **CHILDWISE: Monitoring the Change**

By Jenny Ehren

**The 2015 CHILDWISE Monitor Survey <sup>1</sup> reflects a changing landscape in children’s digital media consumption. For starters, more kids now own a tablet than a laptop, and more 11 to 16 year olds can upload a picture to the internet, than can boil an egg.** CHILDWISE have been studying media consumption and purchasing behaviour among children aged five to 16 for more than twenty years. We have tracked the rapid growth of the internet and subsequent connected technology, and we have watched closely as an online eco-system has emerged, permanently changing the way in which children and young people consume media.

**It is now easier than ever to access information, as well as to share content with peers.** Mobile technology has made communication more convenient, whilst also transforming the humble mobile phone into a sophisticated hub of information and entertainment. Our technology has become ‘smarter’, allowing more and more devices to connect to the internet – whilst content is continually refreshed, and can be accessed anywhere, at anytime. Nowadays, most children have never been a part of a world where the internet is not omnipresent – and as a result, they engage with technology differently.

*“I basically live on the internet. It's just amazing. But if it goes down e.g. my router stops working or there's high traffic, then I just cry inside.” Boy, age 15*

*“The internet is my life, I literally love the internet. Whoever created the internet deserves a prize because they are super cool. It makes me happy and helps me connect with people who I wouldn't be able to talk to if it wasn't for the internet.” Girl, age 11*

*“It's the new generation of communication and fun. But it can cause more trouble than its worth sometimes e.g facebook, instagram, twitter...” Girl, age 13*

**CHILDWISE Monitor data illustrates how children’s media use is in a process of continual change.**

Traditional television viewing is declining and internet use is rising. Mobile phones are becoming increasingly pivotal among older children, whilst tablets dominate the attention of younger children, despite only gaining prominence in the last few years. Households have transformed since Monitor first began, from having just a television set, to four or five different devices – PCs, mobile phones, laptops and now tablets have all become commonplace, with some of the older gadgets now declining.

**In 2015, the majority of children now have their own computer or tablet, phone, games console and television** – but console and television ownership is falling, and phones are static, though more of these are now smart phones. Tablet ownership continues to grow, although this too is slowing. Parents have thrown their weight behind tablets because they are controllable – a tablet can be given or taken away to reflect good or bad behaviour, in a way that is not possible with a conventional television set or computer. Apps can be purchased as rewards, and, with the growing use of tablets in primary schools, there are strong perceived educational advantages. One in three children aged five to seven now have their own tablet, double the number recorded a year ago. For older children, where patterns of technology use are already established, the tablet is slower to displace existing allegiance to a laptop or smartphone, especially among teens. Mobile phones are increasingly used for internet access, and are the main way of listening to music among older children.

*"My **tablet** is my favourite because I love to play on all my apps and go on YouTube. Otherwise it would be my TV but I've got BBC iPlayer already so it would be pretty boring because my tablets got games, YouTube and more." Girl, age 11*

*"I can't live without my **iPad** because I can FaceTime people on it, message people on it, listen to music on it, go on the internet, watch things on it, go on my apps e.g. instagram, snapchat. I cannot live without my music and social network sites"*  
*Girl, age 12*

*"I have tried not watching **TV** for a day but I couldn't, I was soooooo bored. So I just have to have it because it entertains me" Girl, age 10*

*"I love my **phone** and without it I feel like a nobody." Boy, age 14*

*"My **mobile phone** is barely out of my hand. I use it a lot just on social media such as whatsapp, snapchat, facebook, instagram etc." Girl, age 15*

*"I've got so used to coming home doing homework and going on my **games console** that it just wouldn't feel right without it. Also I wouldn't know what to do with myself as my parents would be on their tablets and there is nothing on the TV." Boy, age 13*

*"I love my **xbox**, I always play it. I would rather have fun playing online on Call of Duty: Blacks Ops 2 with my friends, than watch TV all day" Boy, age 12*

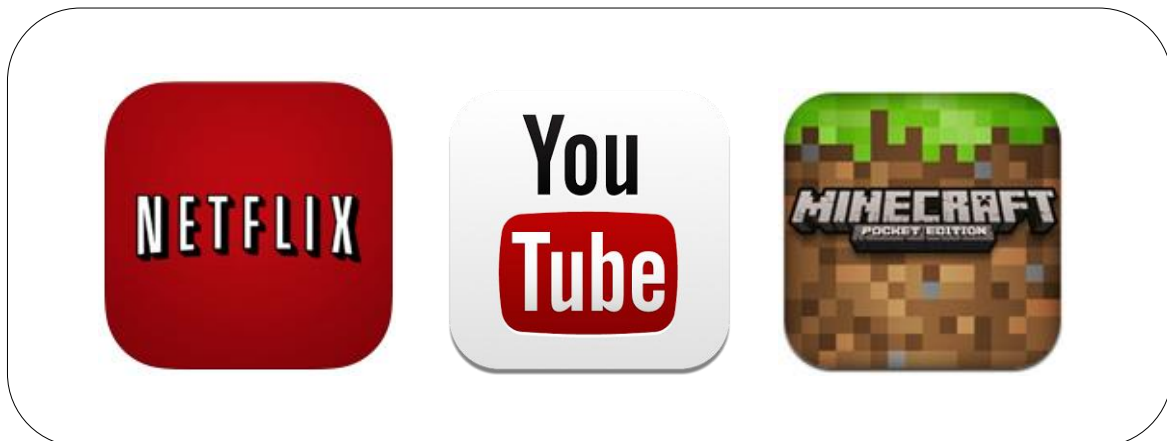
**With traditional television viewing in decline, children have drifted away from mainstream television channels, in favour of paid for on demand, via services such as Netflix. The majority now watch TV via alternative devices, though the television set is still the preferred method for most. But television should definitely not be written off prematurely,** and there should be no doubt that it still plays a very important role in the media lives of children. The resurgence of Hollyoaks, The Big Bang Theory and EastEnders, and the enduring appeal of Friends, have given a greater focus in the last year, while cult series such as The Walking Dead and The 100 catch the attention of older children.

**But as new technologies come and go, the fundamental principles of what engages children remain static. Children will always look for an element of play and entertainment in any new technology or media they adopt, and this is evidenced by the two biggest hits from last year – YouTube and Minecraft.** Both are linked with the further rise of tablet and smartphone ownership among children, and the trend for internet access to emulate the ubiquity previously enjoyed by television. TV viewing still occupies the greatest amount of their time, but internet use is steadily closing the gap.

**YouTube is the top favourite website for boys and girls across the age range,** displacing Facebook among all bar the oldest girls. Two in three children visit each week. Past concerns about the risks of encountering unacceptable material on YouTube have largely disappeared, with parents of even the youngest children now happy to let them use this to access their favourite television programmes, music, games, demos and vloggers. YouTube is increasingly the place where they will go to search out information and online material; in the same way that Google Images superseded Google as the search portal of choice, YouTube has now taken this a step further.

**By contrast, Facebook has long lost the primacy that it enjoyed a few years ago.** It remains a must-use utility for most older children, but now sits alongside Instagram, Snapchat, and to a lesser extent Twitter, as a place to keep in touch and share experiences with friends. The growing popularity of vloggers, such as Zoella and Alfie Deyes, is in part an extension of this diffusion. These sites give teens a chance to tune in to the thoughts and antics of others not so dissimilar to themselves, and feel part of a wider community (which is reassuringly hard for adults to comprehend).

**Minecraft is widely popular for boys and girls across the age range, with children engaging across a range of channels and equipment** – playing the game on computers, tablets, consoles and smartphones, watching demo videos on YouTube or uploading their own, talking to friends as they play, and also reading the growing range of print manuals and other books that feature the game. Part of the initial attraction, especially for older children, has always been the sense that this is a collaborative and user-directed game, comparatively non-commercial by today’s online standards and with an anarchic slant. It is a game that each user can adapt to their own personal preferences, encompassing design and building, challenge, competition, communication, and much more. However the user profile is becoming ever younger, and the recent sell-out to Microsoft has been greeted with concern by some hard-core users, worried that commercial imperatives will change the game.



**Despite the ever-increasing use of the internet and modern technology by children across all ages, the printed book continues to hold a place in their lives.** There are signs that print, alongside other old technologies, is fighting back and adapting to ensure survival. Most children read books for pleasure, although only a minority do so every day, and children’s titles have seen great success this year. Seven out of the ten top selling titles across the market are children’s titles, and an eighth - Guinness World Records - is largely aimed at this age group.

**Links with internet, film and television are key drivers.** Four of these top titles are Minecraft manuals, plus the latest books from David Walliams (well known from TV), Jeff Kinney (Wimpy Kid originated as an online series), and young adult writer John Green (The Fault in Our Stars, released as a film last year). These three writers have another ten titles between them in the top one hundred. Vloggers Zoe Sugg (Zoella) and Alfie Deyes both had books in the top thirty as well. Last year, seven out of the ten top titles sold in the UK were children’s books, underlining the strength of this sector of the publishing industry.

**Magazines have failed to emulate this resilience however, with sales and readership falling year on year.** Apart from football magazines among boys, this year's only success is Marvel, acquired and relaunched by Disney and capturing readership among girls as well as boys. **The ephemeral nature of magazines makes them an easy target for the wide range of internet sites that offer similar material, often for free, for any child who chooses to look online.** Sharing a magazine in the playground or on the school bus has given way to pocket games, music, or sharing posts and pictures on social media via their mobile phones.

**As we move into the future, there can be little doubt that children will continue to spend more and more time on the internet,** particularly as growing numbers acquire devices that are 'always online', such as smartphones and tablets. Connectivity has become a fundamental need for young people, and whilst this remains, there is little sign of the technological revolution reaching its end.

Our latest report – **Connected Kids**<sup>2</sup>, highlights the progressions of the last 20 years, using past data to make predictions on how children will interact with technology in the future. Below are some of the themes that we believe are likely to emerge in the coming years.

#### **In the next two years...**

Recent trends indicate that over the next couple of years, children's use of the internet is likely to overshadow the time they spend watching television. Traditional TV viewing continues to decline at a steady rate, whilst hours spent online will increase. The internet enables children and young people to seek out their own content, and as such, we expect the use of on-demand services such as Netflix to become a routine activity. We also expect Smart televisions to be widely adopted, further enabling children to find the programmes they want to watch rather than be restricted by linear television listings.

#### **In the next five years...**

The next five years could mark a period of convergence for the technology that is currently in use. The recent release of the 'phablet' – a mobile device designed to combine or straddle the form of a smartphone and a tablet, could become a popular gadget for children and young people. Televisions are likely to be internet-connected in some format, allowing for the streaming of content from portable devices to the big screen, whilst Cloud technology will further encourage an environment where children and young people will expect to be able to access their files and information anywhere and on any device.

#### **In the next ten years...**

Looking further into the future, children will have little understanding of a world without the internet. The 'internet of things', a concept in which many household objects communicate and share data using Wifi, could become an accepted norm – whilst having appliances which *cannot* be controlled using a smartphone or some kind of online dashboard may be seen as dated and old fashioned.

Wearable technology is likely to have progressed significantly by this point. Most children will have some form of wearable tech., be it a smart watch, smart glasses or a virtual reality headset. Whether these devices will be used to the same degree as mobiles and tablets currently remains unclear.

**Endnotes**

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<sup>1</sup> **CHILDWISE Monitor Survey** – a comprehensive annual research study with more than 2,000 children and young people aged 5-16, across the UK. The study looks at children’s media consumption and purchasing behaviour, and at aspects of their wider life. Children are interviewed in via the CHILDWISE schools panel <http://www.childwise.co.uk/reports.html#monitorreport>

<sup>2</sup> **CHILDWISE Connected Kids Report** – highlights the progressions of the last 20 years, using past data to make predictions on how children will interact with technology in the future. <http://www.childwise.co.uk/reports.html#specialreports>