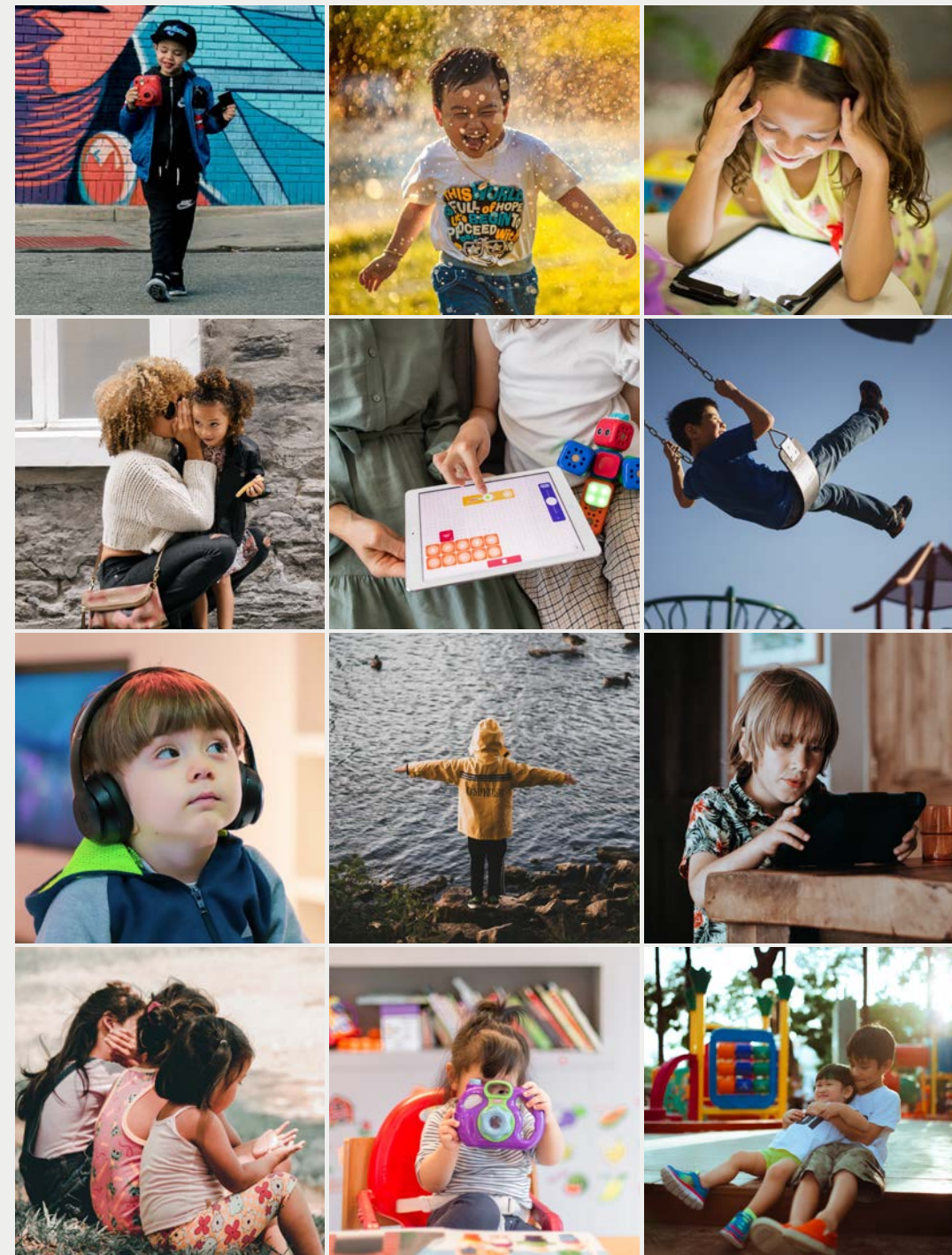




THE KIDS' ENTERTAINMENT EVOLUTION

Changing Content Preferences
in a Post-Pandemic World

UTA IQ // August 2022



Navigating the Kids' Entertainment Landscape

Across entertainment, Gen Alpha (ages 12 and under) is turning up and tuning in. In fact, this generation will reach more than two billion globally by 2025 to become the largest generation in history.¹ Realizing the power of this demographic, creators, studios, and brands have begun doubling down on strategies and investments to attract and engage them. With this in mind, UTA IQ set out to explore the kids' entertainment landscape by revealing Gen Alpha's behaviors across a myriad of media, as well as the topics most important to them and their parents today.

When it comes to topical interests for kids, there's a balance of gravity and levity. The significance of addressing serious topics like climate change and mental health is offset by the importance of fostering creativity and play. Moreover, while young kids' digital usage is soaring across streaming, gaming, and social media, there's also a need for more time spent with tactile play, screen-free entertainment, and in the great outdoors. These trending topics, in tandem with Gen Alpha's increased viewership and listenership, signal substantial growth of and future opportunities in kids' entertainment.

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¹ McCrindle, Understanding Generation Alpha, 2020

Methodology

The Kids' Entertainment Evolution: Changing Content Preferences in a Post-Pandemic World was produced by UTA IQ, the analytics, research, and digital strategy division of United Talent Agency, through a combination of data analysis and trendspotting techniques, including:

- Surveying 1,000 U.S. parents with kids ages 3-12 in June 2022
- Leveraging third-party audience data tools and platforms
- Synthesizing publicly available data from secondary sources, such as Pew, NPD, and Common Sense Media
- Additional desk research into relevant brand examples and entertainment news

Kids' entertainment consumption is surging



STREAMING

↑ **43%**

increase in viewing hours for kids' TV series on Netflix, Hulu, Amazon, and Disney+ from 2019 to 2021.¹



MUSIC

↑ **16%**

increase in the average number of people listening to artists who have released kids-focused music on Spotify since 2021.²



SOCIAL MEDIA

↑ **15%**

increase in viewership of the top 10 monthly kids' content on YouTube from January 2022 to June 2022.³



PODCASTS

50%

of U.S. kids ages 3-12 listen to podcasts, of which 32% listen at least weekly.⁴



GAMING

73%

of U.S. kids ages 8-11 play video games most days, if not every day.⁵

Core topics are driving media consumption *



**EDUCATION &
DEVELOPMENT**



**PHYSICAL &
EMOTIONAL HEALTH**



**CREATIVITY
& PLAY**



**DIVERSITY &
REPRESENTATION**



**TECH &
ANTI-TECH**



**NATURE &
CLIMATE CHANGE**

94%

say it's important that kids' entertainment promotes learning and education.

93%

consider it important that kids' entertainment tackles emotional and mental health.

92%

seek out activities, content, and experiences that encourage their kids to be creative.

82%

believe it's important that kids' entertainment focuses on diversity and representation.

74%

state their kids' screen time doesn't bother them if it's productive and/or educational.

72%

feel it's important that kids' entertainment addresses climate change.

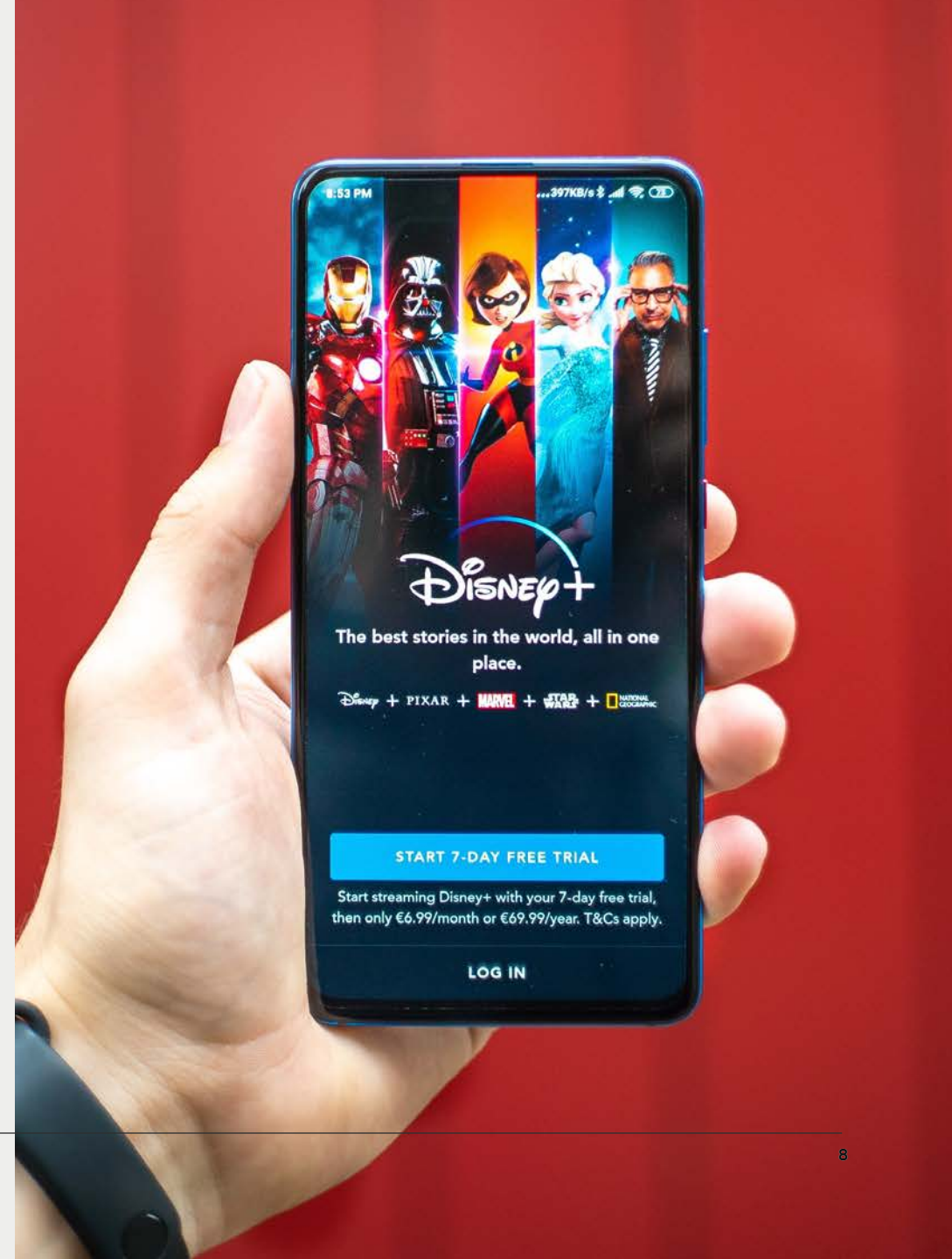
SECTORS

Streaming

58%

**increase in demand for
children's streaming content**
from January 2020 to
September 2021.

Source: Parrot Analytics



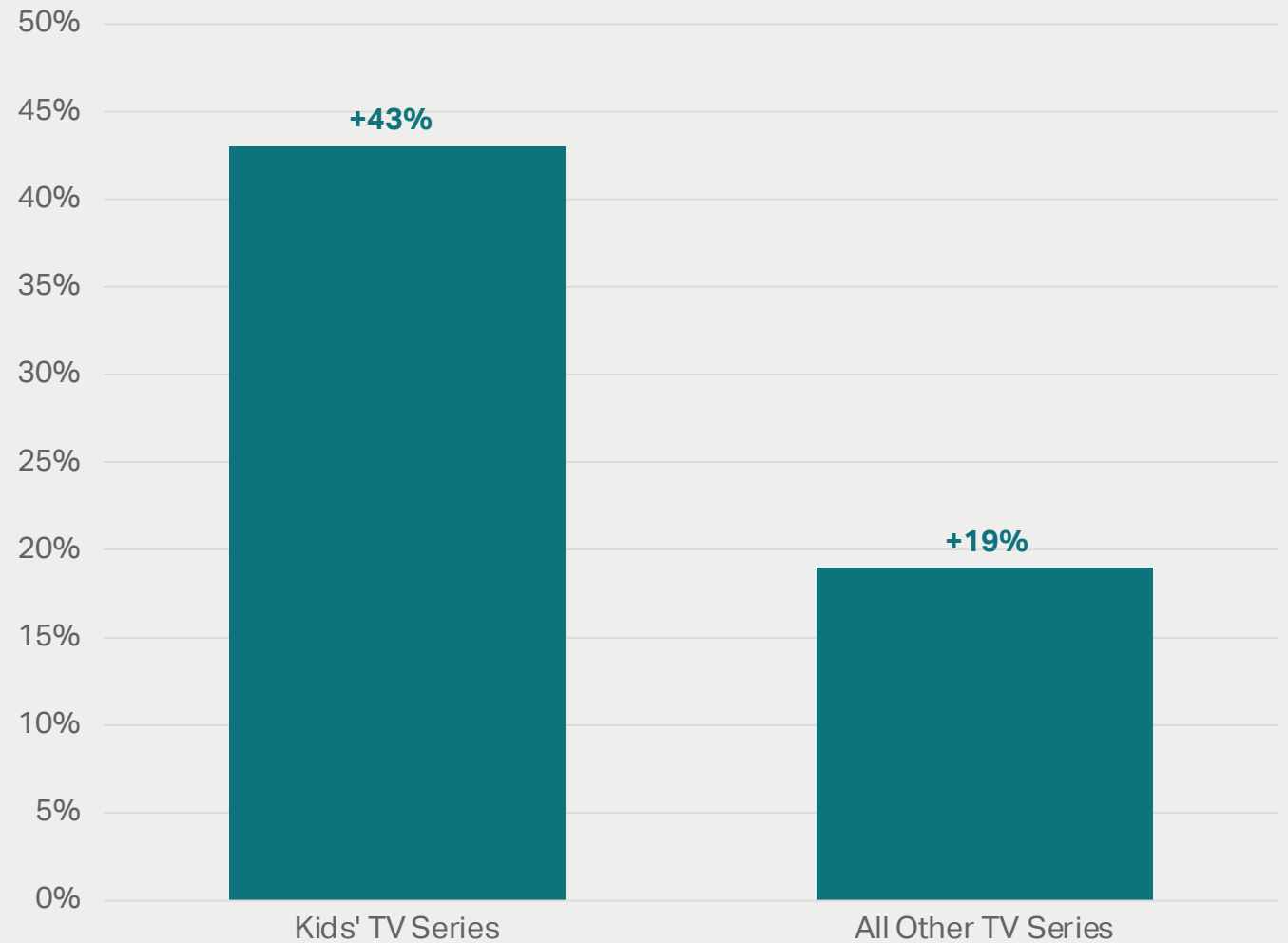
Soaring Viewership

While time spent streaming skyrocketed overall throughout the pandemic, viewership of children's shows grew even more rapidly. According to Nielsen, there was a 43% increase in viewing hours of kids' TV series on Netflix, Hulu, Amazon, and Disney+ from 2019 to 2021, compared to a 19% increase in viewing hours for all other types of TV shows on these streamers during this same period.

With kids' viewing hours on Netflix, Hulu, Amazon, and Disney+ increasing 2.5 times more than all other types of shows from 2019 to 2021, it's no wonder *Variety* has [claimed](#) that kids' television has become the most heated front in the streaming wars.

What's more, while children's viewing hours on these four streamers increased from 2020-2021, viewing hours of all other shows not specific to the kids' space decreased during this timeframe.

Increase in viewing hours for TV series overall on Netflix, Hulu, Amazon, and Disney+ from 2019 to 2021



Industry Confidence

Viewership of kids' movies has likewise exploded on streaming platforms. Four of the top five films on Netflix for all of 2021 were for children, according to Nielsen, including *Mitchells vs. The Machines*, *Vivo*, *We Can Be Heroes*, and *Home*.

While repeat viewing and families' slower-than-average return to movie theaters impact these results, streamers recognize the high demand for family-friendly films is not just a passing trend. In fact, their investments indicate continued confidence in the space, as Netflix has made one of its biggest title acquisitions to date with the [Roald Dahl library](#). Additionally, [Dr. Seuss Enterprises](#) is working with bankers to determine the value its IP would offer streamers, and it will undoubtedly be a major win for any buyer given that it's the #1 literary license in the U.S. by print sales, according to NPD BookScan.



4 of 5

of the top films on Netflix in 2021 were kids' titles

"Kids content used to be perceived as a tool to stop users from cancelling streaming accounts. Now it's a key driver for new user growth."

— Axios, November 2021

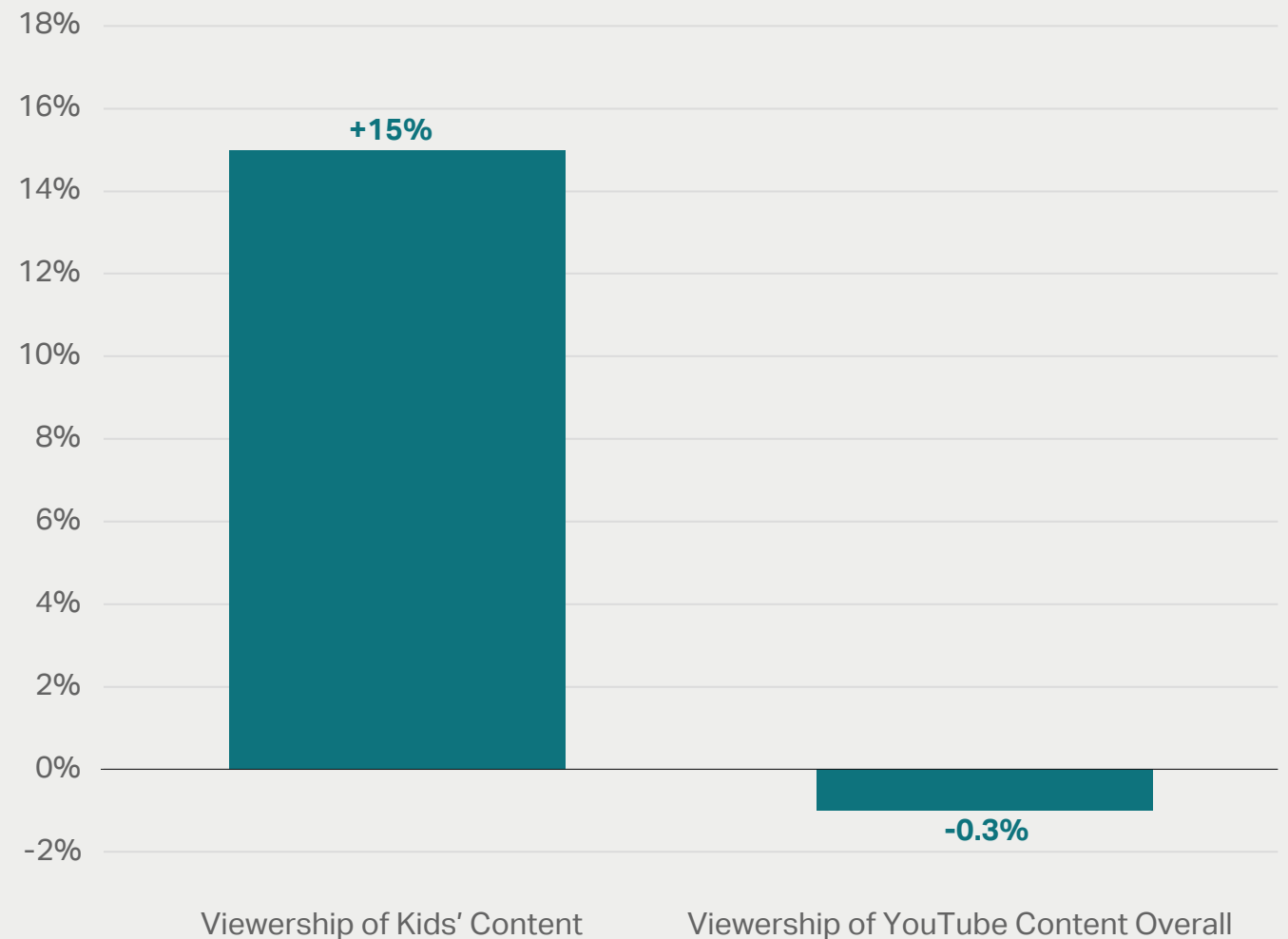
Social Media

Taking Off on YouTube

Viewership of kids' content on YouTube is surging at a significantly faster rate than viewership of content overall on the platform. In fact, there have been 9.5 billion more views of the monthly top 10 kids' content over the past six months than the six months prior — a 15% increase. Comparatively, viewership of the monthly top 10 YouTube content channels overall has slightly decreased during this same period.

This surge in kids' viewing on YouTube comes as no surprise given that 85% of U.S. children ages 2-12 watch videos on YouTube, per research from [Giraffe Insights](#). This is higher than the percentage of U.S. kids in this age range who watch content on streaming platforms (71%) and twice as much as those who watch TV via broadcast (41%).

Change in viewership of the monthly top 10 content channels on YouTube over the past six months¹

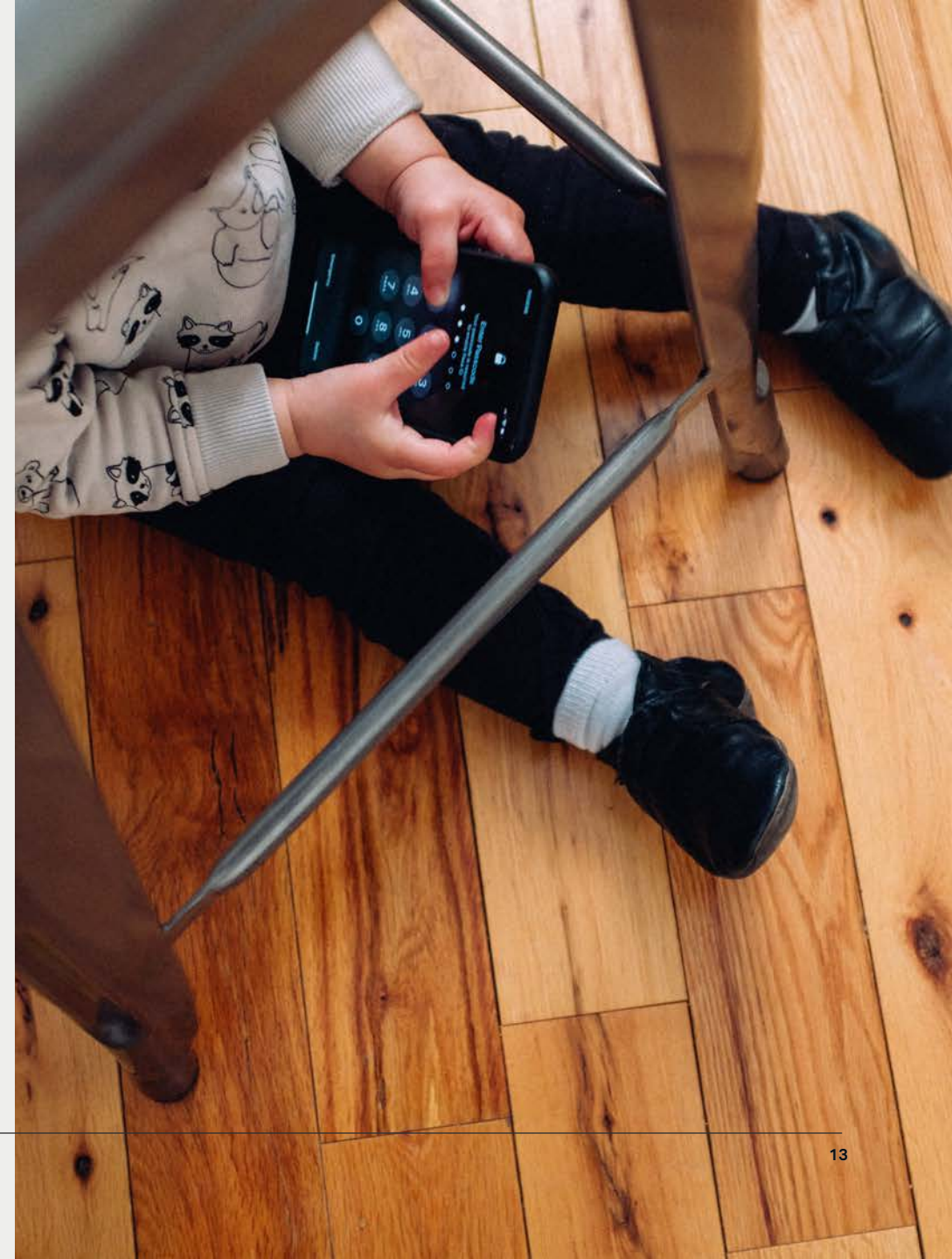


¹Monthly viewership from January 1, 2022 to June 30, 2022 compared to the six months prior.

53%

of U.S. parents would like
to see **safer social
platforms for their kids.**

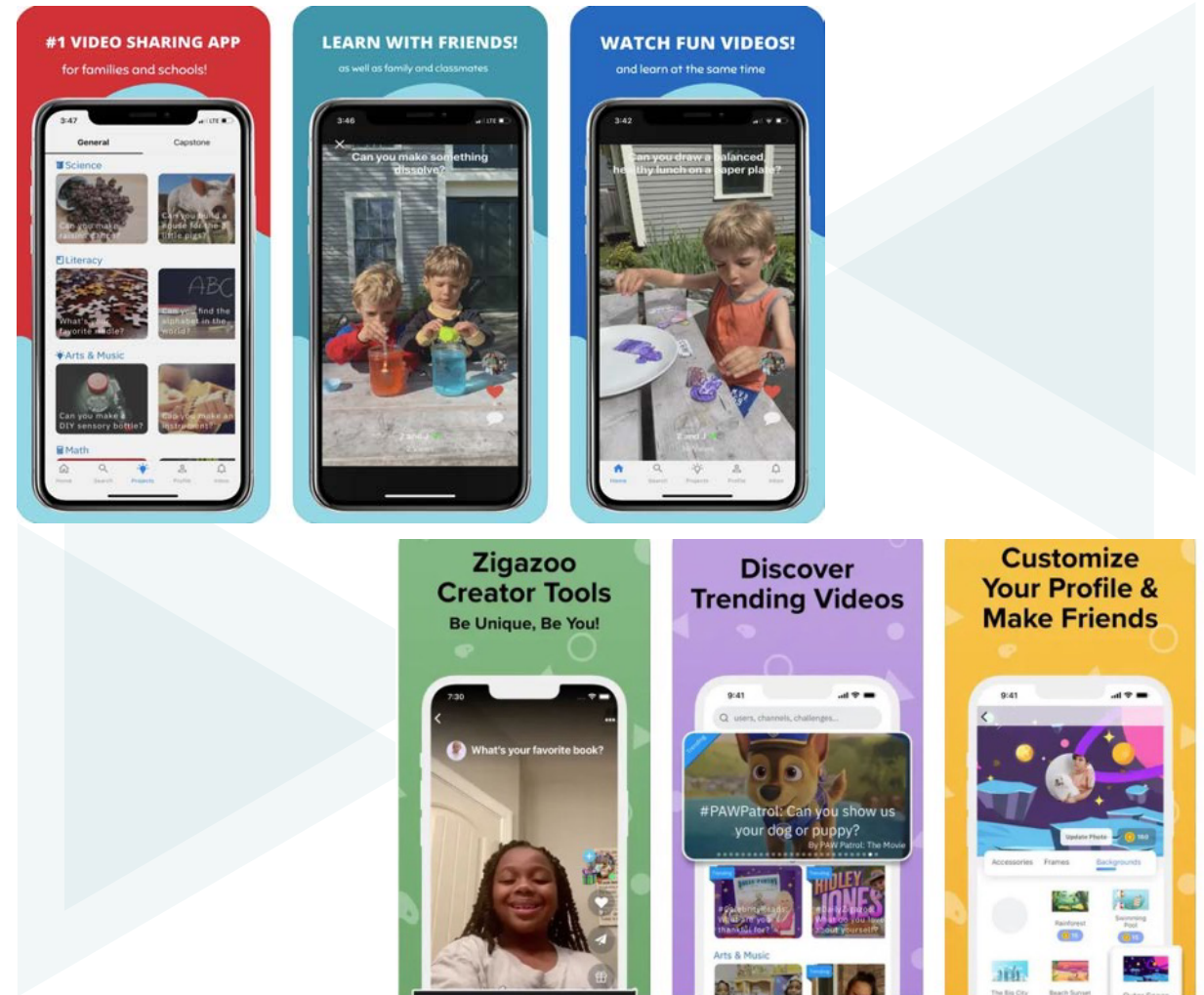
UTA IQ survey among U.S. parents with kids ages 3-12, June 22-29, (n=1,000)



Kids-Specific Platforms

Traditional social media platforms are acting to improve internet safety for kids. As part of its #BeCyberSmart initiative, TikTok released new [online safety tips](#), some of which help to keep kids and teens safe on the app. Meanwhile, Meta rolled out more [parental controls](#) and [age verification processes](#) for Instagram.

As concerns around kids' internet safety continue, many parents are turning to made-for-kids social media platforms, where parental controls, age restrictions, and content moderation are considered from conception. Zigazoo, a short-form video platform that's on a mission to help kids develop safe and healthy online habits, is among the most notable of these new platforms. It's won over [celebrity investors](#), including Serena Williams, the D'Amelio sisters, Jimmy Kimmel, and the NBA.

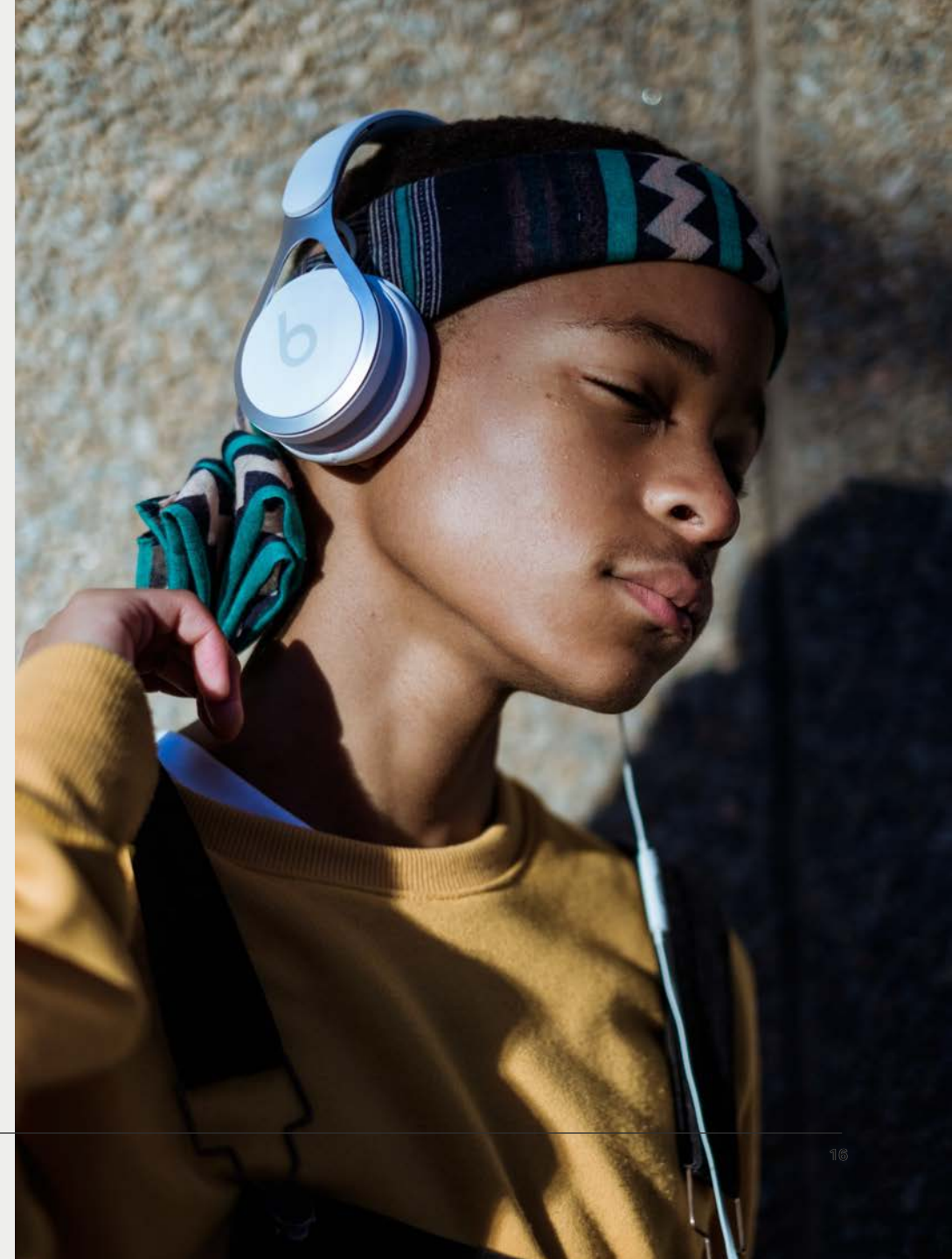


Podcasts

50%

of U.S. kids listen to
podcasts; of those, 32%
listen at least weekly.

UTA IQ survey among U.S. parents of kids ages 3-12, June 22-29, (n=1,000)

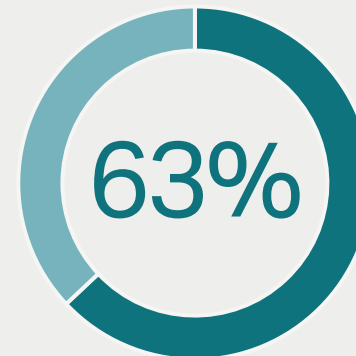
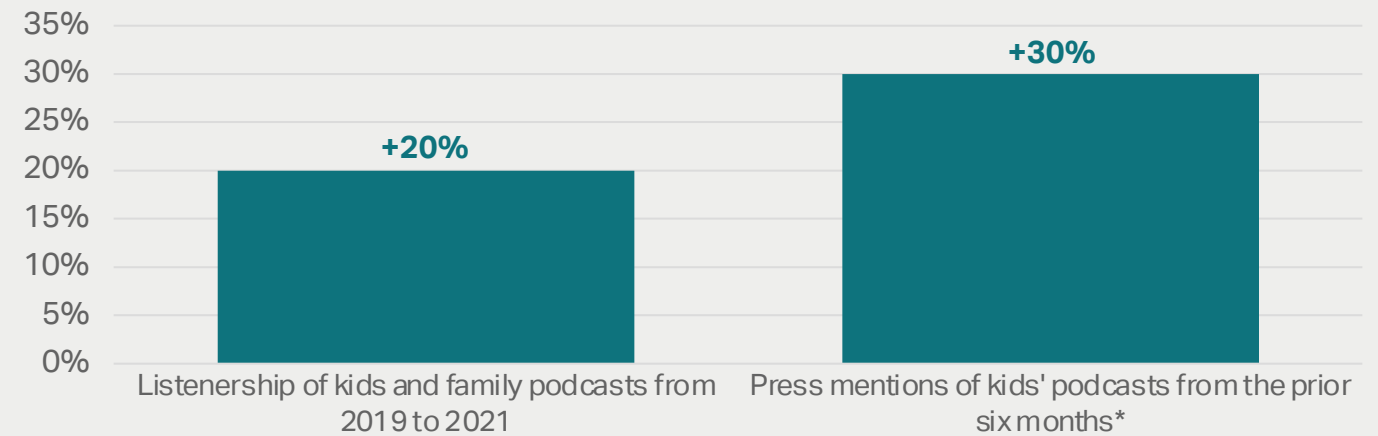


Booming Market

As kids' time spent streaming soars, there's a greater need for screen-free entertainment, thus fueling the ascending market for children's podcasts.

According to NPR and Edison's [2021 Spoken Word Audio Report](#), the kids and family podcast category has experienced a 20% increase in listenership since 2019. This growth stands to reason given the rise in kids' titles and the surge in press mentions about them, as well as parents' encouragement of the medium. In fact, nearly two-thirds of parents who indicate that their kids listen to podcasts do so with their children, per [The Kids Listen](#).

The Rise of Kids' Podcasts



of U.S. parents listen to kids' podcasts with their children

*Press mentions from January 1, 2022 to June 30, 2022 compared to the six months prior.

Increased Investment

As kids' podcast listenership grows, more companies are venturing into the category. Last fall, Wonderly, the Amazon-owned podcast studio, launched Wonderly+ Kids, a subscription service on Apple Podcasts. Earlier this year, Apple partnered with Common Sense Media to curate collections of podcasts for kids, and iHeart teamed up with Collab Inc. to launch Creativity, a kids' podcast network.

At the same time, other forms of kids' entertainment are being turned into podcasts, such as *CoComelon*, *Arthur*, and *American Girl*.

Based on the rise in kids' titles, the Ambie Awards, which recognizes top podcasts and talent, has added a children's category this year.



Gaming

66%

**increase in press mentions
regarding children's gaming**
from January 2022 to June 2022.*

*Compared to the six months prior



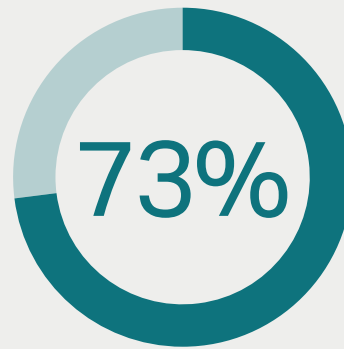
Get in the Game

Gaming is integral to Gen Alpha life, ranking as their favorite pastime, according to [Cassandra](#). Its importance is further reflected by the frequency with which they play games; three-quarters of U.S. kids ages 8-11 play video games most days, if not daily, per [GWI](#).

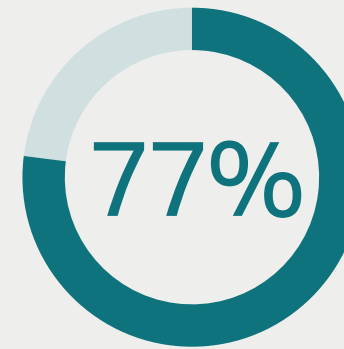
Already, eight in 10 U.S. parents with kids ages 8-15 play video games with their kids weekly, according to [Entertainment Software Association](#), and they are encouraging their kids to play more. New research from [OnePoll](#) finds that the majority of U.S. adults believe that kids playing video games helps them develop fundamental skills, and three in five feel that gaming should be incorporated into school curricula. Given the benefits they find from gaming, such as promoting problem solving, creativity, and unstructured play, gaming is poised to continue rising in popularity and usage.

#1

pastime among U.S. kids ages 7 to 12



of U.S. kids ages 8 to 11
play video games most
days, if not every day



of U.S. parents of kids ages
8 to 15 play video games
with their kids weekly

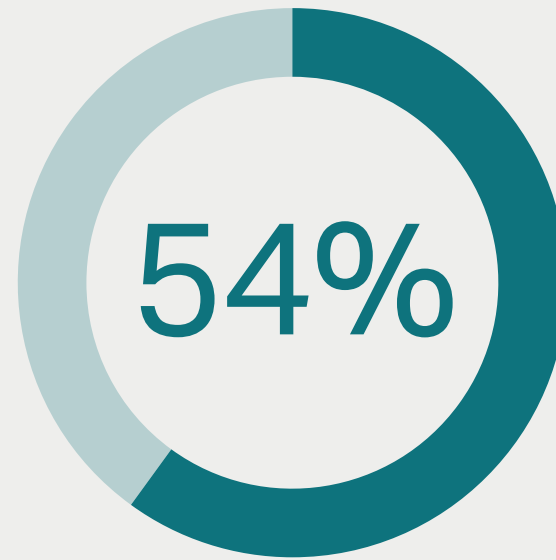
"If Millennials had Facebook, and Gen Z have TikTok, we can call Alphas the Minecraft or Roblox generation."

— GWI

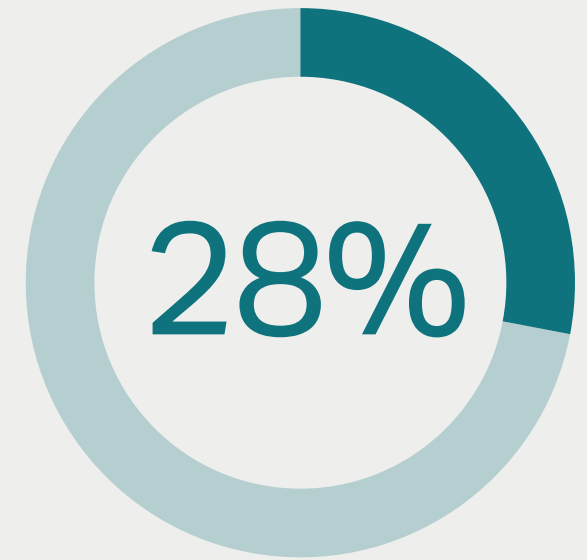
Building the Future of Games

Recognizing how vital gaming is to kids, brands are focusing on games as a growth marketing channel. Earlier this year, Amazon Kids+ teamed up with pocket.watch to offer original kids' games, while Mattel announced to investors that digital gaming is one of its priority areas. Sony and LEGO are likewise confident in the future of this space, having made a \$2 billion investment in Epic Games, while Spin Master's digital games' revenue increased by 57% in Q4 of 2021 compared to the same period the year prior.

In particular, open-ended games are most coveted by Gen Alpha. Specifically, over the past year, the largest increase in demand among U.S. kids ages eight to 15 is for games that allow them to create/build, such as Roblox and Fortnite, according to [GWI](#). This suggests that games promoting creativity and unstructured play are likely to experience continued growth.



of Roblox's users worldwide are 12 or under¹



growth in usage of Roblox among Gen Alpha from Q1 2021 to Q1 2022²

Sources:

¹Roblox's 2021 Data Report

²GWI Kids Q1 2021 & Q1 2022 Report among U.S. kids ages 8 to 15, (n=15,237 in 2021), (n=15,925 in 2022)

Music

48%

of U.S. parents would like to see
**more music-based products
and content for their kids.**

UTA IQ survey among U.S. parents of kids ages 3-12, June 22-29, (n=1,000)



Turning It Up

With the global phenomenon of music-based kids' IP like *Baby Shark* and *CoComelon*, it's clear that the market for children's music is booming with no end in sight. Indeed, according to data from Chartmetric, Spotify experienced a 16% increase in the average number of people listening to artists who have released kids-focused music from 2021-2022, making the kids' category the second-highest in unique listener growth across major genres, only behind Latin.

To meet demand, music labels are expanding their presence in kids' entertainment through partnerships with children's brands. In 2020, Universal Music Group announced an exclusive deal with LEGO to help children explore their creativity through play and music, while Warner signed a global music licensing deal with Mattel to serve as the sole distributor of the toy brands' catalogue of 1,000+ songs and collaborate on the creation and distribution of new music.

Growth in Kids' Music Listenership on Spotify from 2021-2022

#2

highest unique listener growth across major genres¹

↑ 16%

increase in the average number of people listening to artists who have released kids-focused music

¹ Chartmetric Genre Comp Set: Latin, Hip-Hop, Rock, Pop, and Electronic

Modernizing Music

Artists are seizing the opportunity to enter the kids' music market with their own creative ventures. Electronic musician Marshmello has a brand called Mellodees that infuses EDM beats into kids' songs that educate and inform. Questlove and Black Thought of The Roots produced music for Disney+'s new show *Rise Up, Sing Out*, which tackles real-world issues for kids. Rapper Ludacris created children's platform KidNation, which features music videos of young kids rapping positive lyrics among its offering of educational resources.

Emerging music-based kids' brands are also benefitting from these passionate young listeners. For instance, Gracie's Corner, which offers educational nursery rhymes modernized as hip-hop songs, has amassed more than 772,000 followers across social media since launching in April 2022. Its most popular track, the "[Phonics Song](#)," has generated more than 440 million views on TikTok in July 2022 alone.



"In the big business of music for kids, parents are the final frontier. There is fertile ground (and perhaps more longevity) in the possibility of making something they'll enjoy alongside their kids."

— *The Guardian*, June 2022

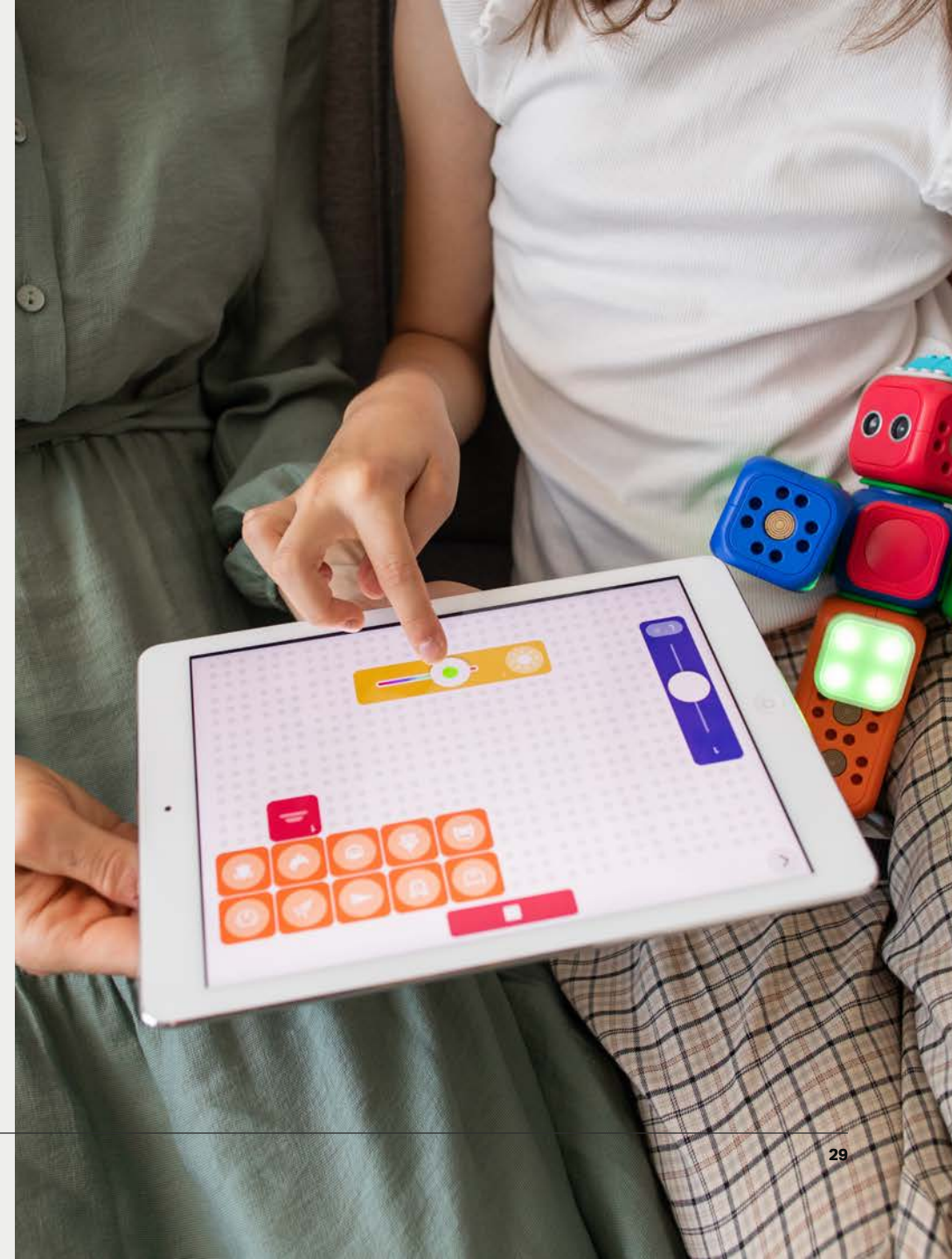
SUBJECTS

Education & Development

94%

of U.S. parents say it's important
that kids' entertainment **promotes
learning and development.**

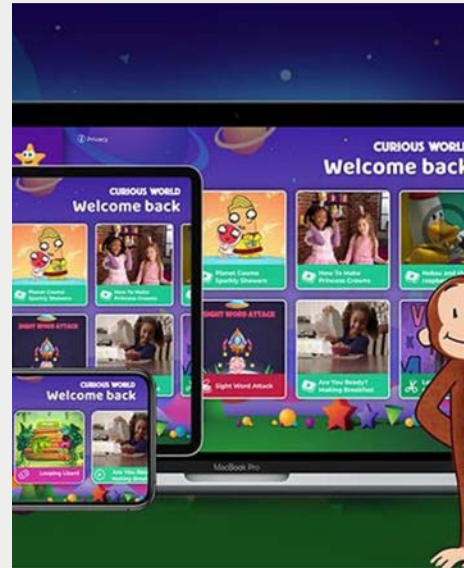
UTA IQ survey among U.S. parents with kids ages 3-12, June 22-29, (n=1,000)



New Curricula

The pandemic drastically impacted education for children. A 2020 survey by [The Education Trust](#) found that nearly nine in 10 parents were worried about their children falling behind academically due to pandemic school closures, or more distressing than their financial and socioemotional concerns. Their worries were realized when an assessment of 1.6 million U.S. elementary school children by [McKinsey & Co.](#) found that students fell behind by an average of five months in math and four in reading by the end of 2021.

This circumstance has given a boost to the e-learning, or online learning, market. A 2021 survey of parents by “playlearning” app [LingoKids](#) found that almost 70% of parents relied on learning apps to help their children keep up with their studies. Further, LingoKids has tripled its number of users since the start of the pandemic.



EdTech Expansion

With children at varying skill levels, educational platforms like Curious World enable parents to personalize subject matters and formats to their child's needs. Moreover, the metaverse presents enormous opportunities for the edtech market. Apps like VR Expeditions 2.0 already enable teachers to take students on virtual field trips to 360 different cities.



Bite-Size Lessons

As attention spans continue to shrink, microlearning and nanolearning are picking up traction. BBC's Bitesize and TED-Ed have leaned into short lessons for years, but TikTok has amplified the shift. Teachers have a significant presence on the platform with videos using #TeachersofTikTok being viewed 29 billion times and videos using #LearnonTikTok garnering 317 billion views to date.



Watch & Learn

A [2021 study](#) of kids who watched PBS kids' program *Molly of Denali*, which teaches informational text skills, found that the more time children spent with the show, the better their abilities, thus demonstrating the tangible benefits of educational digital media. HBO Max is also leaning into edutainment with its *Looney Tunes* revival, *Bugs Bunny Builders*, by combining children's interest in building and design with the Human-Centric Learning Curriculum.

Schools of Thought

Early childhood education increasingly reflects topics and values touched on throughout this report.

For instance, the number of forest kindergartens and outdoor preschools in the U.S. has doubled from 2017 to 2020, per [Natural Start Alliance](#).

Outdoor education is said to improve sensory skills, problem solving, and anxiety. With a heightened need for these benefits and parents' newfound appreciation for the outdoors (see Nature & Climate Change section), this is bound to continue leveling up.

The pandemic's effect on children's mental health also furthers the importance of Social Emotional Learning (SEL) to improve kids' emotional communication and empathy skills. According to [Verified Market Research](#), the global SEL market is projected to reach \$65 billion by 2028. From edtech platforms to toy companies, brands are integrating SEL lessons and activities into children's offerings.



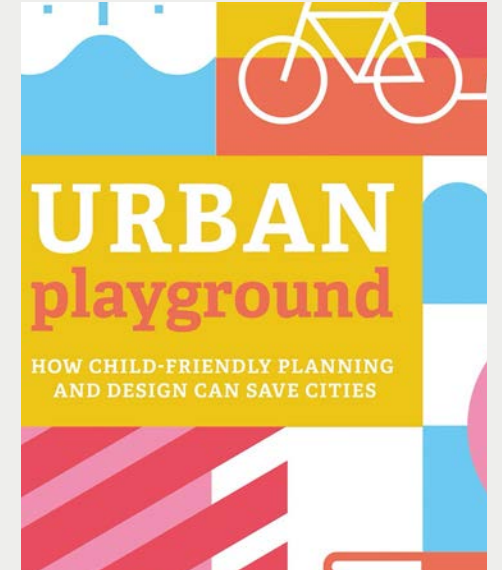
Montessori Momentum

TikTok is popularizing the Montessori method, which is designed to foster independence in children; there are more than 2.8 billion views of the hashtag #Montessori on the platform. Most of the videos are of parents sharing easy tips and recommendations to help prepare their Gen A children to be self-sufficient. This year, the virality of *Old Enough!* on Netflix, a '90s Japanese reality show where young children go on errands by themselves for the first time, sparked parental debate over children's autonomy.



Social Emotional Learning (SEL)

Educational resource companies and toy brands alike often offer a social-emotional development category. Consider brand Hand2Mind, which in addition to providing learning guides for literacy, math, and STEM, also features SEL activities, such as feelings journals and mirrors.



Playful Learning Landscapes (PLL)

In 2020, nonprofit Brookings launched Playful Learning Landscapes City Network to transform public urban spaces into fun, educational opportunities, something Philadelphia does each summer when it shuts down hundreds of streets to create playgrounds and activity centers for kids. Author Tim Gill explores the benefits of these initiatives in his new book *Urban Playground*.

Physical & Mental Health

70%

of U.S. parents say their kids
don't get enough exercise.

Source: The Harris Poll and Nestle Water, January 2022



Phys-Ed Encouragement

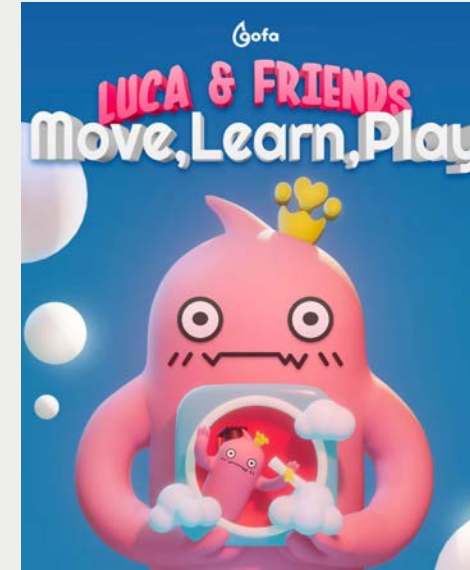
Health concerns are growing as children's screen time increased during the pandemic. Conversely, participation in team sports decreased. In fact, a report by the [Aspen Institute](#) from September 2021 revealed that nearly three in 10 U.S. parents whose children played sports pre-pandemic said their kids didn't want to return to the main sport they played; on top of this dwindling interest, nearly one in four state that their child's health decreased either greatly or slightly since the start of the pandemic.

However, parents are still trying to get their kids outside and active. [OnePoll](#) found that 75% of U.S. parents said creating memories of playing outdoors with their child is a top priority and they believe that their kids' physical health (72%) and mental health (60%) would be positively impacted with more outside play. This emphasis on outdoor activity is reflected in the toy market. Of U.S. toy sales in the first four months of 2022, outdoor and sports toys was the largest category with \$1.3 billion in sales, per [NPD](#).



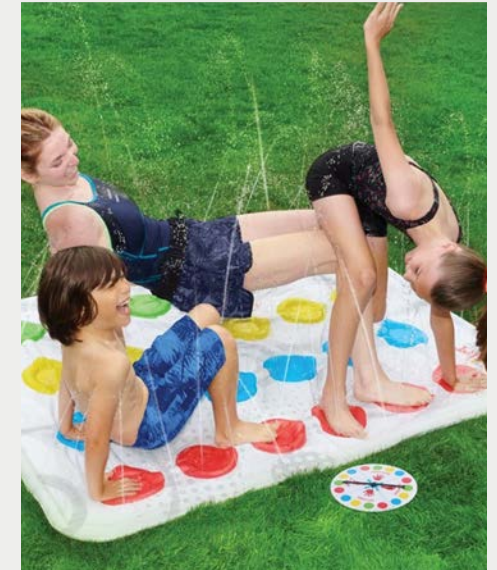
Wheels Up

While team sports are on the decline, independent ones, like bicycling, skateboarding, scootering, and roller skating, are growing. According to the Aspen Institute, [bicycling](#) became the third most popular sport for kids in 2020, up from 16th place pre-pandemic. Roller skating has taken off on TikTok —videos using the hashtag [#rollerskating](#) having been viewed 7.8 billion times with usage growing 63% from June 2021 to June 2022.



Digital Fitness

Cosmic Kids Yoga, which boasts 1.3 million YouTube subscribers, posts guided yoga classes often in collaboration with kids' entertainment properties like *Sonic* and *Frozen*. Kids' edutech platforms are also focusing on fitness, from GoNoodle's engaging physical movement and mindfulness courses to Luca & Friends' AI-powered app using immersive games to gets kids moving.



Outdoor Active

Toy brands are making outdoor play a priority. Hasbro partnered with WowWee to turn its indoor games into outdoor activities, like a sprinkler-infused *Twister* and *Crocodile Dentist*, while B4 Adventures released 4Fun ChangeUp portable system that comes with six different large bag-toss game boards like tic-tac-toe and shuffleboard.

93%

of U.S. parents consider it
important that kids'
entertainment **addresses
emotional and mental health.**

UTA IQ survey among U.S. parents with kids ages 3-12, June 22 - June 29, 2022, (n=1,000)



Emotional Awareness

The pandemic has exacerbated the mental health crisis among kids as they became disconnected from classmates, friends, and organized activities. It follows, then, that a [New York Times](#) survey from April 2022 found that 94% of U.S. school counselors said their students were showing more signs of anxiety and depression than before the pandemic, and 88% noticed students having more trouble regulating their emotions. This is of particular concern to parents. According to a 2022 survey by [On Our Sleeves](#), 93% of U.S. parents say it's important to talk about mental health with their kids; however, only 41% know how to do so.

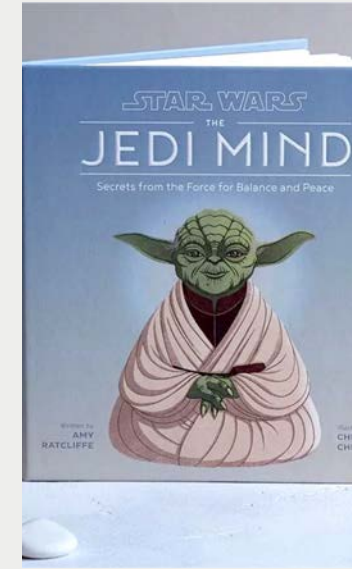
Given these grim statistics, mental health has become a central topic of kids' media and entertainment, from toys that help children express their feelings to content that promotes mindfulness and meditation.



LEGO's Build Big Feelings
The toy brand posted a helpful guide for parents on how to use LEGO blocks to create an open dialogue about their kids' feelings.



Turning Red Many Moods of Red Panda Toy
Based on the Disney film in which the main character's overenthusiasm turns her into a red panda until she regains her composure, this plush toy helps kids express excitement and then calm down using activated soundbites from the movie.



The Jedi Mind
The Star Wars franchise uses the Jedi Code to engage young readers in practices such as breathing, posture, and meditation.



Goodnight, World!
Meditation app Headspace partnered with Sesame Street on a podcast of bedtime stories to help children calm their minds and bodies for a better night sleep.

Nature & Climate Change

85%

of U.S. parents say it's
important to them that their child
spends time outside.

OnePoll survey among U.S. parents of kids ages 5-13, March 19, 2021, (n=2,000)



Nature Nurturing

As the pandemic turned the outdoors into a much-needed respite, a profound appreciation for nature has taken root. The [National Parks Service](#) received 297 million recreational visits last year, up 25% from 2020. Further, [L.L.Bean](#) reported that in 2021, sales of kayaks and family tents jumped 128% and 53%, respectively, while [NPD](#) reports that nationwide sales of camping equipment climbed to \$605 million in June 2020, a 31% increase from the previous year.

Outdoor brands are tapping into parents' admiration for nature, such as The North Face, which hosted a free online summer camp with hands-on outdoor activities for families, and REI's collaboration with West Elm on a stylized camping collection that came with a podcast of campfire stories for families to enjoy together. Now, more children's products and entertainment are calling kids to the great outdoors.



Mud & Bloom

This monthly subscription box for three- to eight-year-olds is full of seasonal gardening and nature craft activities, as well as educational materials on animals, plants, insects, and birds.



The Campground Kids

This five-book series follows a family's action-packed adventures while camping in different national parks.



American Girl

This doll brand's 2021 Girl of the Year was Kiera Baily, who spends the summer at her aunt's wildlife sanctuary in Australia learning about animals and their surrounding environment.



Crate&Barrel x Jane Goodall Institute

The kids' furniture and décor collection celebrates wildlife and the environment, including a playhouse replica of Goodall's research camp.

72%

of U.S. parents feel it's important
that kids' entertainment
addresses climate change.

UTA IQ survey among U.S. parents of kids ages 3-12, June 22-29, (n=1,000)



Environmental Empowerment

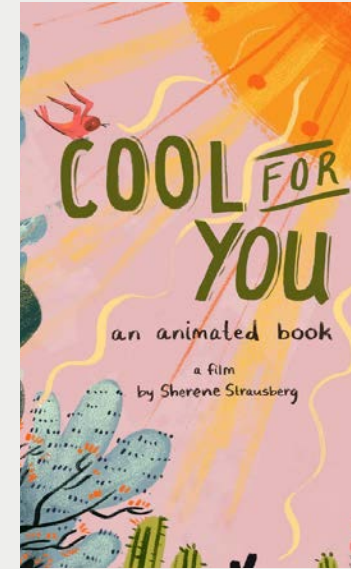
Young people are experiencing chronic stress about climate change, often referred to as “eco-anxiety.” Organizations from the [World Economic Forum](#) to [National Geographic](#) have highlighted the severity of this issue among youth, while a 2020 survey of child psychiatrists in England [found](#) that more than half (57%) are seeing children and young people distressed about the state of the environment. This reality was even reflected in *Big Little Lies*’ second season when Renata Klein’s seven-year-old daughter was rushed to the hospital for a panic attack after learning about climate change in school.

As children become exposed to climate change discourse earlier than ever, there’s a need to infuse it with positivity and hope. Kids’ entertainment is increasingly broaching this topic in a productive way; indeed, sales of children’s books related to the environment grew by 69% between 2019 and 2021, according to [Nielsen](#).



SeaBelievers

This forthcoming animated, musical TV series follows characters as they take action around environmental issues. It’s the first character line to be a member of global organization 1% for the Planet.



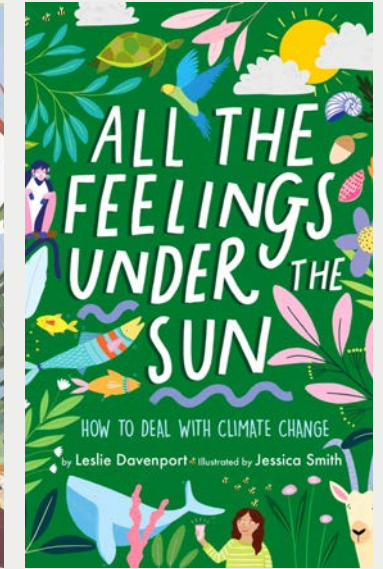
Cool For You

This animated short film based on the titular book explains global warming to children through different characters, families, animals, and plants.



Old Enough to Save the Planet

This illustrated book features 12 real stories of child activists across the globe who are making strides in saving the planet.



All the Feelings Under the Sun: How to Deal With Climate Change

This book seeks to help kids work through their anxiety around the environment.

Tech & Anti-Tech

74%

of U.S. parents say their kids' screen time doesn't bother them if it's **productive or educational.**

UTA IQ survey among U.S. parents with kids ages 3-12, June 22 - June 29, 2022, (n=1,000)



Tactical Tech

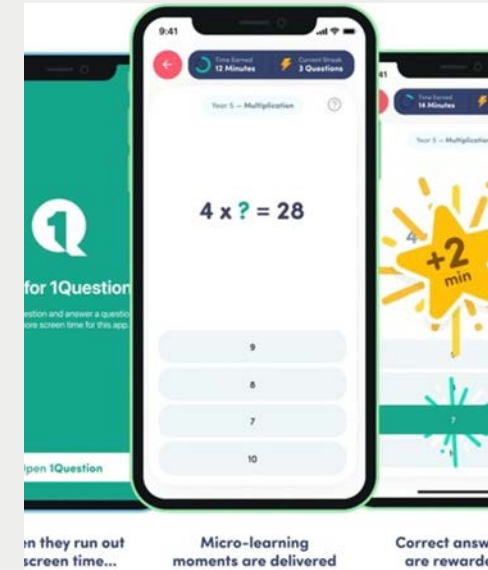
With tech ever-present in kids' lives, parents are seeking to make their kids' time with it as purposeful and productive as possible. Nearly all U.S. kids under 10 (98%) have access to a smartphone or a tablet in their home and 45% have a device of their own, according to [The Common Sense Census](#). There's simply no escaping tech; rather, parents need to learn how best to navigate it to benefit their children.

This mindset is leading parents to keenly evaluate what's "good" and "bad" screen time, so entertainment creators and brands would do well to focus on creating kids' content, products, and services that fall on the "good" side of the equation. In addition to the emphasis on educational kids' content, there's a rise in tech that invites kids' participation. Indeed, 56% of U.S. parents would like to see more interactive entertainment for kids.¹ Additionally, there's an emphasis on tech that helps them form healthier digital habits and safely prepares them for future technology developments.



Interactive Tech

Entertainment companies are offering content that invites kids as active participants. In June, Readyland launched the first books that readers can talk to by pairing printed kids' titles with Alexa. Likewise, audio company Pinna, aimed at kids ages 3-12, recently launched the first voice-activated interactive podcast. Netflix is also expanding its interactive shows for kids, with the recent release of *Battle Kitty*.



Healthy Tech

There's a white space for technology that serves as "digital nutrition for kids" by helping them manage how much time to spend with tech and how to do so in beneficial ways. New mobile game 1Question recognizes this opportunity; users earn screen time by answering educational questions, thus only rewarding them with additional tech time if they are productive first.



Future Tech

Brands are creating safe, informative resources and spaces for kids to learn about what's next in tech. For instance, Crypto Kids Camp teaches kids about everything from AI to VR using hands-on games and activities, while Hatch Kids by Camp K12 lets kids build 3D games, AR/VR apps, and metaverse experiences without any prior coding experience.

¹ UTA IQ survey among U.S. parents with kids ages 3-12, June 22 - June 29, 2022, (n=1,000)

92%

of U.S. parents say that compared to pre-pandemic, they now **seek out more screen-free activities, entertainment, and/or content for their kids.**

UTA IQ survey among U.S. parents with kids ages 3-12 , June 22 - June 29, 2022, (n=1,000)



Anti-Tech Appreciation

Even with the focus on more productive and meaningful screen time, parents continue to worry about their kids' digital dependence. As of early March 2020, one-third of U.S. parents felt their children spent too much time using smartphones or playing video games, according to [Pew](#). Then, pandemic-induced quarantine and virtual classrooms amplified their concerns. Repeating the study in April 2021, Pew found that 42% of U.S. parents felt this way about their kids' usage of smartphones.

With screen time among U.S. tweens (ages eight to 12) rising by 17% from 2019 to 2021, according to [The Common Sense Census](#), there's a greater need for low-tech and no-tech alternatives to entertain kids. This is spurring the market for screen-free toys and entertainment, from the surge in kids' podcasts (cited earlier in this study) and emphasis on outdoor activities, to audio storytelling toys and screen-free coding solutions.



Audio Storytelling Toys

Toniebox, Yoto, and Lunni lead the growing market for audio storytelling toys. Each are specifically designed as low-tech, screen-free devices for kids to hear narratives, much like books on tape. Kids simply put a figurine on top of the device or insert cards into a slot to play specific stories.



Screen-Free Coding

Parents are gravitating towards and even crowdfunding items that help kids learn the fundamentals of coding without adding to their screen time. For instance, last fall, an engineer at Google launched a successful Kickstarter campaign for *Little Hackers*, a print book that guides kids through coding principles. Likewise, Buildy Bots, another Kickstarter success story, teaches kids to code with an entirely physical toy.

Creativity & Play

92%

of U.S. parents seek out activities, experiences, and/or content that **encourage their kids to be creative.**

UTA IQ survey among U.S. parents with kids ages 3-12, June 22 - June 29, 2022, (n=1,000)



Creative Control

While parents and brands typically emphasize STEM skills to prepare kids for the future, creativity is essential too, especially in reaction to today's technology-driven world. In fact, the World Economic Forum's [*Future of Jobs Report*](#) cites creativity as one of the three most important skills children will need to thrive.

What's more, as kids grow up amidst a bleak state of the world, it's more important than ever to encourage creativity as a tactic for problem solving and a way to inspire hope and joy. This focus is seen through brands' efforts to foster creativity, such as giving kids tools and platforms to use their imagination.



Brand Creativity Camps

Brands are hosting free camps for kids to do creative art projects alongside others. For instance, craft retailer Michaels offers an in-store and online summer camp for kids, aptly named Camp Creatology, where attendees can make a different art project each day. Additionally, Apple has brought back its in-person kids' camp after a pandemic hiatus; this year, kids and families can visit stores anytime from late June to late August to make digital comic books.



Kid Creative Directors

Brands are also giving kids creative license over their products and services by appointing them to official positions where their imaginative ideas can be heard. Last year, LEGO launched a search for its first Kid Creative Director, a position open to seven to 17-year-olds to participate in creative workshops to help conceive future content. Similarly, Sun-Maid invited kids ages six to 12 to join its first Board of Imagination, a role to work with employees and fuel creative thinking.

88%

of U.S. parents believe that,
amidst current events,
**kids' play and fun have
become more important.**

UTA IQ survey among U.S. parents with kids ages 3-12, June 22 - June 29, 2022, (n=1,000)



Prioritizing Play

It's difficult for kids to simply be kids today given the seriousness of the world. While parents want to educate their kids about heavier topics with which they will need to contend, from climate change to mental health, they also want their kids to be able to escape the stresses of modern life. As such, parents are making a concerted effort to ensure that their children have ample time for activities and entertainment that provide pure enjoyment and fun for fun's sake.

This desire is evidenced by the global popularity of feel-good kids' shows. In analyzing the online activity of kids' content in November 2021, such as social media interaction and video views, [Parrot Analytics](#) found that kids' feel-good shows were nearly twice as much in demand than the average kids' show. Similarly, when it comes to toys, parents and kids are flocking to products that let kids enjoy themselves without rules or structure, as well as those that provide excitement and anticipation through surprises.



Open-Ended Play

Products that encourage free play and let kids explore without a wrong or right way of doing so are resonating. For instance, the app Pok Pok enables kids to learn through digital toys that grow with children as they age up and possess a multitude of ways to play with them.



DIY Activities

Playtime is involving kids in the construction of toys, much in the vein of the slime creation craze. Spin Master has created a [Future of Play site](#), which provides guidance on how kids can create their own toys. Additionally, this August, Tech Deck, known for its miniature skateboards, is releasing a DIY Concrete Kit, so kids can make their own ramps and skateparks.



Surprise & Delight

With the state of the world taking a heavy toll on kids, there's been strong demand for toys that fulfill their need for pure wonder and amazement. This is most evident with the viral popularity of 5 Surprise Mini Brands' balls filled with toys. In fact, it was [the best-selling collectible toy of 2021](#) and the brand experienced 365% growth from 2020 to 2021. Other brands have likewise found surprise tactics to be a hit; Mattel offers a "Color Reveal" version of Barbie and Hot Wheels cars, where kids dip them in water to see what color they will get.

Diversity & Representation

82%

of U.S. parents believe it's important that kids' entertainment **tackles diversity and representation.**

UTA IQ survey among U.S. parents with kids ages 3-12, June 22 - June 29, 2022, (n=1,000)



Conversation Starters

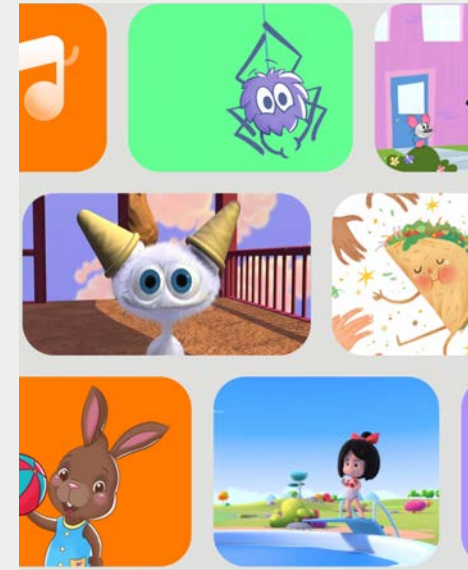
An increasingly diverse U.S. population has raised the stakes for representation. In fact, more than 50% of kids in the U.S. are multicultural or nonwhite, per the U.S. Census Bureau, and parents are desiring more inclusive media that reflects this. According to [Common Sense Media's 2021 *The Inclusion Imperative Report*](#), 70% of U.S. parents say it is important that their children are exposed to content that helps them learn more about their own culture, religion, or lifestyle. Additionally, 78% want media that teaches children about cultures, religions, and lifestyles different from their own.

Inclusive content can help families discuss topics that may otherwise be hard to broach. Indeed, the study cited above found that 57% of parents say that the media their child consumes has prompted conversations about diversity, illustrating the important role entertainment can play in families' lives.



Sulwe

Lupita Nyong'o's best-selling children's book *Sulwe* tells a story about colorism and self-esteem through a main character who has darker skin than anyone she knows. The actress read the book on Netflix's 2020 series *Bookmarks*, which featured Black celebrities and artists reading children's books by Black authors about the Black experience. Last year, Netflix also announced it's turning the book into an animated musical.



Encantos x 3Pas Studios

Purpose-driven storytelling platform Encantos curates audio, video, books, and games from creators that represent a diverse range of subjects and perspectives for children eight and under. Recently, the company announced a partnership with 3Pas Studios to develop children's entertainment IP, including animated series, consumer products, and publishing, that's culturally authentic and relatable.



Miniland

Storyed play brand Miniland creates toys that assist diversity, integration, and emotional education. For example, its Family Diversity Blocks, named one of *Good Housekeeping's* Best New Toys of 2022, help parents and teachers speak to children about different family models that exist today through customizable blocks and activity cards.

Increased Visibility

Representation in media has real-world benefits that influence how children form perspectives about themselves and others. Indeed, two in three U.S. parents believe that the media has a major impact on how their kids treat others, per [Common Sense Media](#). Thus, it stands to reason that more than 80% of parents say it is important that the content their children see teaches them to accept people who don't look like them and their families.

In addition to characters that are racially diverse, representation spans disability, gender identity, and sexual orientation. Research by [Insider](#) found that while 2019 marked the highest number of newly-confirmed animated queer and gender-diverse characters in a single year of TV, more than 90% of LGBTQ+ characters in animated kids' programming are behind a paywall. As such, representation is not only about content that's inclusive and diverse, but also accessible.



ND Stevenson

ND, or Nate, is the non-binary cartoonist and animation producer of *She-Ra and the Princesses of Power*, which ran on Netflix from 2018-2020, winning the GLAAD Media Award for Outstanding Kids + Family Programming in 2021. His new animated show based on his graphic novel *Nimona*, which features an identity-fluid main character voiced by Chloë Grace Moretz, is set to release on Netflix next year.



Brown Toy Box

The company's mission is to ensure Black children see positive depictions of themselves in the toy isle. Additionally, Brown Toy Box wants to be an early entry point for Black children to explore STEAM activities and future careers to inspire the next generation of innovators. Its assortment of toys can be found at Target and on Amazon.



Barbie

Mattel continues its diversity and inclusion efforts with new dolls in its Barbie collection. This year, it introduced the brand's first Barbie with hearing aids and a Ken doll with the skin condition vitiligo. According to the company, when it released a Black Barbie doll with vitiligo in 2020, it became one of the best sellers in the U.S. that year.

