
Children's Media Environment

Screen Time, Content and
Brand Safety Concerns



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EXECUTIVE SUMMARY

Parents are increasingly aware of the impact that screen time has on their children. There is heightened sensitivity about time spent with screens, the quality of the content, the quantity of marketing messages directed to children, and the unintentional exposure to content not appropriate for kids. The rise of streaming and the availability of hand-held devices has enhanced those concerns.

Recent studies have shown that parents don't consider all screen time to be the same. In fact, some believe television is the preferred medium, because it can be more easily co-viewed with the parent. This exposure to quality television content in a shared environment can have a positive impact on a child's development. But television viewing can vary greatly with respect to quality, educational value, and amount of advertising that children are exposed to. All these considerations impact parental decisions with respect to their children's screen time.

Our Research Study

To understand the attitudes and behaviors of the national television audience, the Sponsorship Group for Public Television partnered with Lightspeed Research to field a comprehensive study to gain insight into attitudes and behaviors as they pertain to television viewing, including children's television. Please see Appendix for more information.

Screen Time

"Screen time" has had negative connotations since the term was first coined in the early 1990s. Screen time includes time spent with television sets, DVD players, computers, smart phones, tablets and other mobile devices, as well as video game devices. Too much screen time has been associated with poor eyesight, obesity, inhibited emotional development, and level of happiness.¹ Some forms of screen time, however, notably children's educational television, have been praised for the ability to foster learning, especially when parents and children share the experience.

¹ Source: American Journal of Preventative Medicine, Reducing Children's Recreational Sedentary Screen Time, March 2016



With the growing availability of hand-held devices, the impact of screen time is a growing concern for parents.

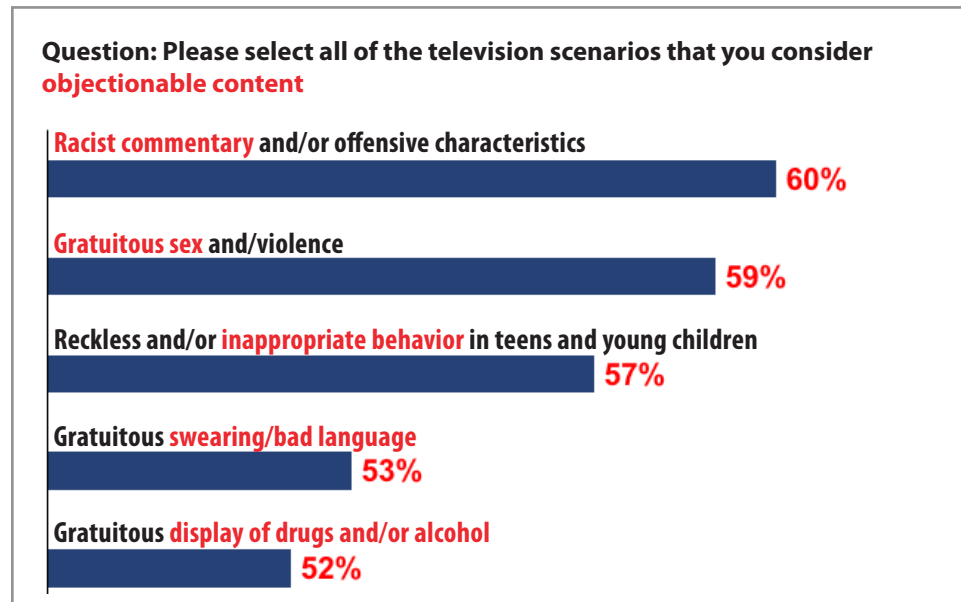


The American Academy of Pediatrics recommends limiting screen use for preschool children ages 2–5 to just one hour a day of high-quality programming. On average, the children in their study, released 1/28/19, were viewing screens two to three hours per day. Nielsen reported in Q2 2018 that children age 2–11 spend an average of 3 hours and 18 minutes with TV and TV-connected devices alone, indicative of a big jump in screen time for all screens combined.

Content Concerns With Online Video

Parents are concerned that more and more of children’s screen time is spent streaming content on smaller screens (tablets, smart phones). This time is often spent alone, without parental guidance and influence, with the potential of exposure to “objectionable content.” In our propriety study, we identified the attitudes of parents with respect to what they consider to be objectionable content that children may encounter during unsupervised screen time.

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 Parents are concerned about children’s exposure to objectionable content during unsupervised screen time.



Source: Lightspeed Research/SGPTV Viewer Attitudes & Behaviors Study | March 2018

YouTube’s Impact on Children’s Video Consumption

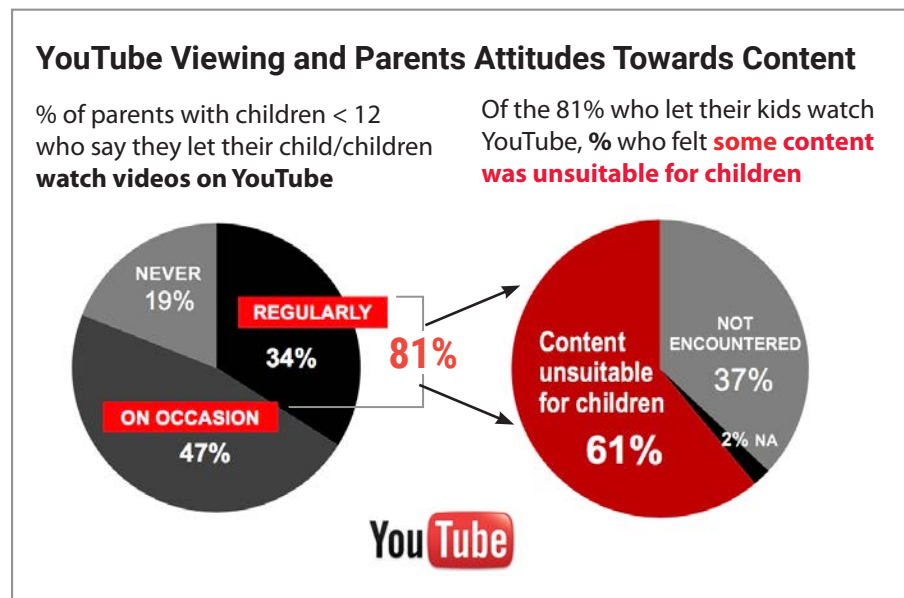
YouTube is the number one destination for short videos for adults and children alike. YouTube receives over 30 million visitors per day, with almost 5 billion videos viewed daily.



YouTube launched YouTube Kids in 2015 with curated videos and parental controls. Despite their efforts to provide a fun and educational viewing environment for children, YouTube has faced criticism from children’s groups for its use of algorithmic suggestions of videos that may result in inappropriate content being shown to children, as well as exposure to advertising that may be difficult for children to differentiate from programming content. And on March 1, 2019, YouTube announced it was disabling all comments in videos featuring children, over fears of “predatory comments” targeting children.

A June 2018 study from Pew Research confirms parents’ concern over YouTube viewing. Of those surveyed, 81% of parents say they let their child/children watch videos on YouTube, and 61% of those respondents (49% of all parents surveyed) say their child has encountered content they felt was unsuitable for children.

49% of all parents surveyed say their children encountered unsuitable content on YouTube.



Source: Survey of U.S. adults conducted May 29–June 11, 2018. “Many Turn to YouTube for Children’s Content, News, How-to-Lessons” Pew Research Center

TV: The “Good Screen”

The American Academy of Pediatrics recommends that parents take a more active role in choosing TV/video programming for their children that is age appropriate, non-violent, and ideally educational in nature.



They also recommend a shared experience: parents should watch with their young children and discuss what they've seen together.

Allison O'Keefe Wright, EVP Managing Director at Open Mind Strategy, and an expert on the Millennial market, shared insights in an article on MediaPost's The Marketing Insider (10/24/18).

"... it's ironic that the digital generation, the original 'digital natives,' are pretty anti-digital parents. Because they're concerned about digital disconnection, they view TV as the 'good screen.' TV has always been that screen everybody wants to hate when it comes to children, but now parents are so concerned about the digital environment, that TV is now OK."

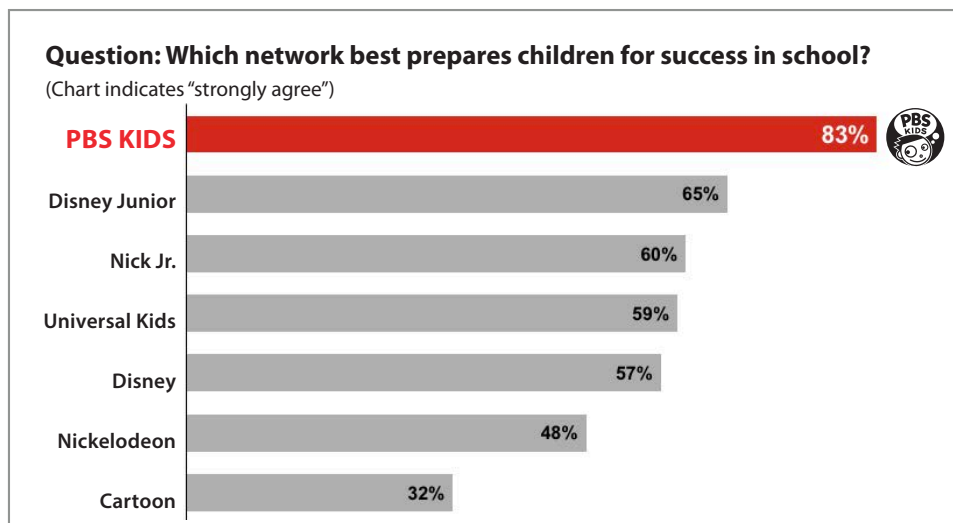
"The generation credited with the demise of TV now views it as the good screen, yet are underwhelmed by the lack of quality 'family content.' And where there is discontent, there is opportunity for brands and media producers to step up and produce a better product."



Millennials now view TV as the "good screen" for their children.

A Better TV Product for Children

Parents are seeking alternatives, and they are finding it in children's educational media. They recognize its positive impact on learning, creativity, social skills, and preparation for their child's success in school.



Source: Marketing & Research Resources Inc. M&RR, January 2019



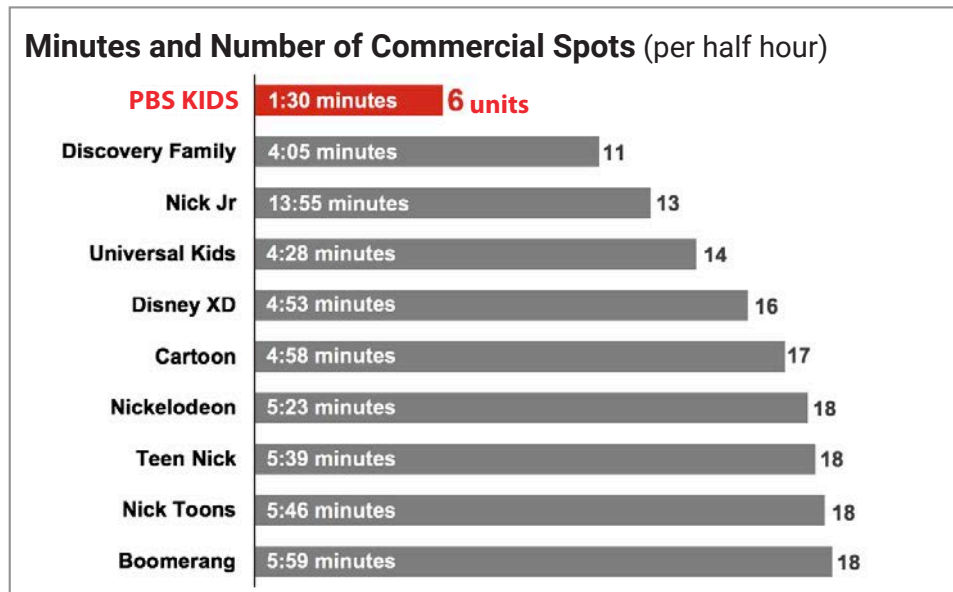
83% of parents feel PBS KIDS helps prepare children for success in school—far surpassing other children's networks.



Advertising Clutter on Kids TV Networks

Although there has been a lot of press about commercial networks taking action to decrease the amount of advertising, particularly in primetime, that strategy hasn't impacted children's programming.

A recent snapshot of the number of non-programming minutes in a typical half hour reveals the heavy commercial load in children's programming.

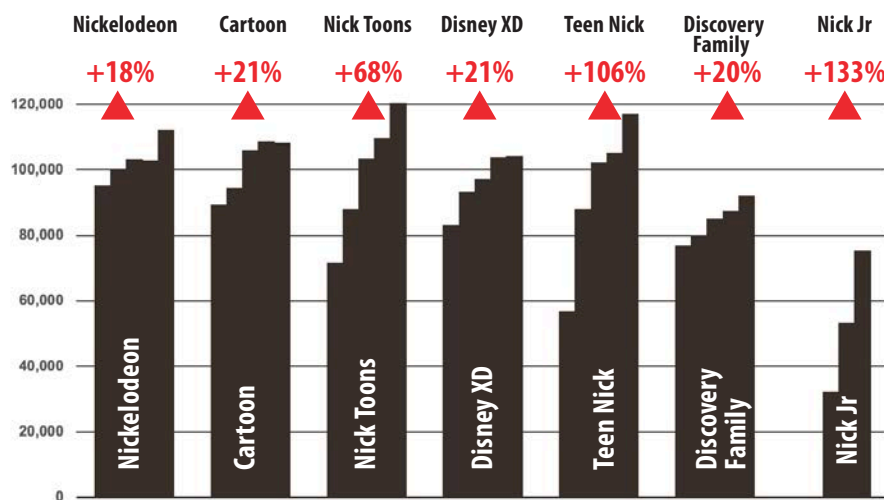


Source: Kantar Media, October 2018

Commercial clutter is actually much higher than it was just 4 years ago. The number of ad units has increased by an average of 36% from 2014–2018 for the seven most popular commercial kids networks.

Ad units in commercial children's programming have increased an average of 36% year over year from 2014 to 2018.

Ad Units on Commercial Networks 2014–18



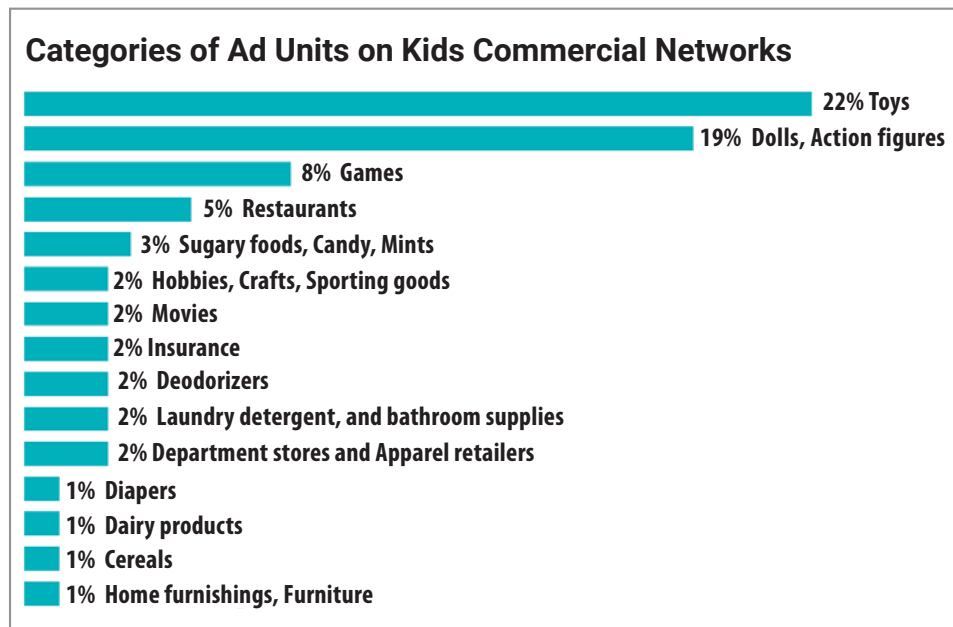
Source: Kantar Media



Product Messaging in Children's Programming

In addition to the overall volume of advertising directed to children, parents often take issue with the messages themselves, and in some cases, the products that are advertised. This is an especially vexing issue for parents as overly commercial environments can prompt excessive requests from their kids for products such as toys or sugary foods.

From September to December 2018, the top 3 product categories advertised on kids commercial TV networks were #1 Toys, #2 Dolls/ Action figures, and #3 Games. In October 2018, 49% of all ads were for products in these 3 categories.



Source: Kantar Media, October 2018

In December 2018, a toy manufacturer that was the top spender on the highest-rated kids network ran an astounding 1,977 ad units. Nielsen Ad Schedule Reach/Frequency tools reveal that the ad schedule reached 36% of all kids 2–5 living in U.S. TV households an average of 62 times!

Parents Search for Safe, Educational Choices

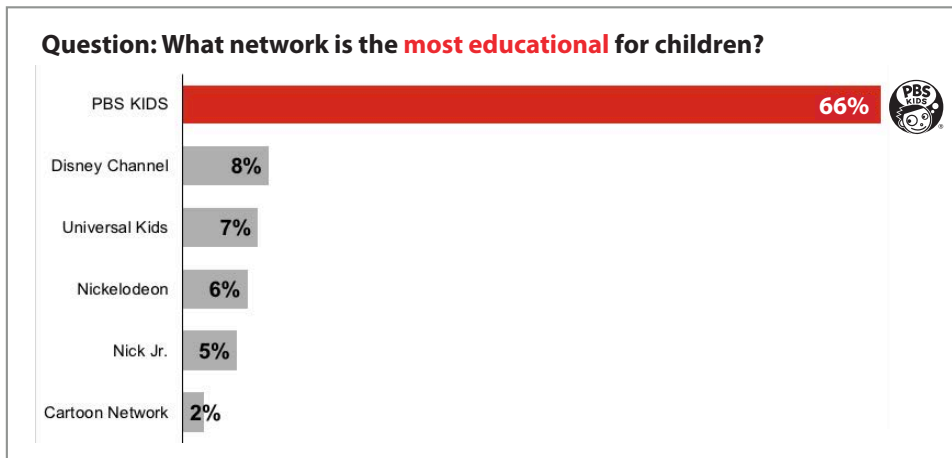
Parents are looking for safe screen time options for their kids, with content that is both entertaining and educational. For many, PBS KIDS is the preferred platform.



In October 2018, 49% of all ads on kids TV were for toys, dolls, action figures and games.



Parents view PBS as the leader in quality, educational content. New research shows that parents rate PBS KIDS the #1 educational media brand.



Source: Marketing & Research Resources, Inc. M&RR January 2019

Parents view PBS KIDS as the leader in key criteria that contributes to their child’s development.

I agree that the network I watch...	PBS KIDS	Kids Cable
Promotes positive social and emotional behaviors for children	94%	74%
Is a trusted and safe place for children to watch TV	94%	77%
Helps to improve reading, math, and social skills	91%	58%
Has a website that is a trusted and safe place for children to view additional content and play online games	86%	69%

Source: Lightspeed Research/SGPTV Viewer Attitudes & Behaviors Study | March 2018

Parents rate PBS KIDS as #1 in educational content, safety and trust.

Parents Appreciate How PBS Sponsorship Messages are Different

PBS protects its safe, non-commercial environment by ensuring that messages are targeted to co-viewing parents, and not to children. Elements such as hard-sell pricing and product claims are not permitted on PBS KIDS. This key difference between PBS KIDS and commercial kids programs is recognized and appreciated by parents. And, viewers understand that corporate sponsors of PBS KIDS programming provide financial support that fund production of the content they trust.



Parents have a positive attitude towards PBS and PBS sponsors

86% of parents say they are grateful to the corporations that sponsor PBS programs



84% of parents appreciate the clutter-free, non-commercial environment while watching PBS programs

Source: Lightspeed Research SGPTV Viewer Attitudes & Behaviors Study | March 2018

PBS KIDS Elevates Key Brand Attributes for Sponsors

This difference in the quantity and quality of sponsor messaging on PBS KIDS is reflected in the attitudes parents have regarding PBS sponsors. Key criteria such as product quality, trust and purchase preference are elevated for PBS sponsors. Ultimately, this increased trust and respect that viewers have for PBS sponsors leads to an increased likelihood to purchase.

Parents' Attitudes Towards Sponsors	PBS KIDS	Kids Cable
Has sponsors/advertisers that promote products that are beneficial to the healthy development of my child	83%	58%
I trust the sponsors /advertisers more than sponsors/advertisers on other children's networks	79%	54%
I prefer to buy from sponsors/advertisers of this network vs. sponsors/advertisers of other children's networks	68%	43%

Source: Lightspeed Research/SGPTV Viewer Attitudes & Behaviors Study | March 2018

Contact us

Visit our website SGPTV.org for more information about PBS Corporate Sponsorships. And contact us today to connect with a sales representative, call 800.886.9364 or email us at sgptv@wgbh.org.



The PBS Halo Effect: Parents' appreciation for PBS content transfers to PBS sponsors, leading to increased purchase intent.



APPENDIX

Research Methodology and Overview

This study was designed and implemented by SGPTV in partnership with Lightspeed Media. It is the latest in a series of studies commissioned by SGPTV to understand viewer opinions and attitudes about TV programming content, and advertisers/ sponsors that support that content. (2006, 2009, 2013, 2015, 2018)

The 2018 study was fielded March 19 – March 29, 2018.

- Respondents screened: Adults 18 years or older, reside in the U.S.
- Viewers of any of the following networks (past 30 days) were invited to take the survey:
 - ABC, CBS, Fox, NBC, CNBC, CNN, Discovery, ESPN, HGTV, History, Lifetime, MSNBC, National Geographic, TBS, TNT, USA.
- Total respondents: 5,105 nationally representative with age cells mirroring the U.S. population.
- Of 5,105 total respondents, 950 respondents with children under the age of 12 were asked questions specific to children's TV.
- Like the broader survey, we focused on both programming attributes and sponsorship/advertising attributes for PBS KIDS and five of the most popular commercial kids networks. (Cartoon Network, Nickelodeon, Nick Jr, Universal Kids/ Sprout, and Discovery Family). Specific questions emphasized childhood education and development as well as attitudes toward commercialism.

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