

A group of four young people, two men and two women, are gathered outdoors, looking at their smartphones. They are all smiling and appear to be engaged in a collaborative activity. The background shows a brick building with a red roof. The overall mood is positive and tech-oriented.

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Alpha Impact: **How Kids Are Shaping** **Media, Tech & Commerce**

This is a presentation about Gen Alpha



Gen Alpha: the generation born between 2010 and 2024 (and so now aged up to 15).

In some cases data about this generation is hard to find, so where it makes sense we make cautious use of data sets including older ages.

In the presentation, when we say:

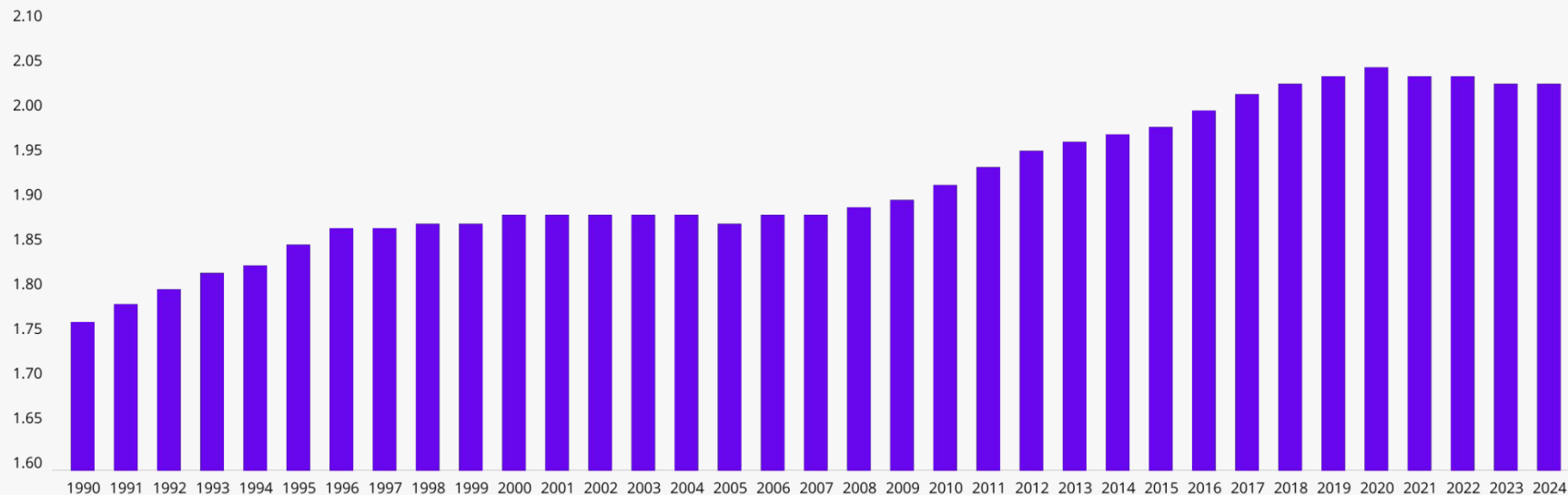
- 'Kids' we mean U13s
- 'Gen Alpha' we mean U15s
- 'Gen Z' we mean people aged 15 - 25
- 'Teens' we mean people between the ages of 13-17 unless otherwise stated. This includes some members of Gen Alpha and some of Gen Z.

Every kid is a member of Gen Alpha.

There are over 2bn U15s on earth

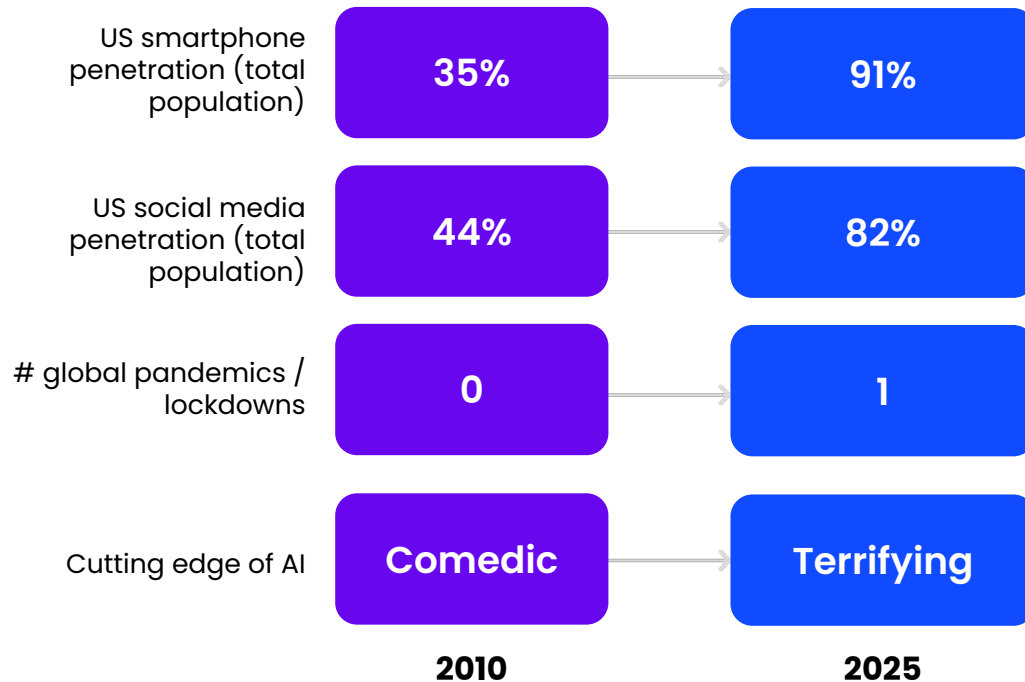
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Global U15 Population



A generation that's lived through interesting times... and may be pretty different as a result

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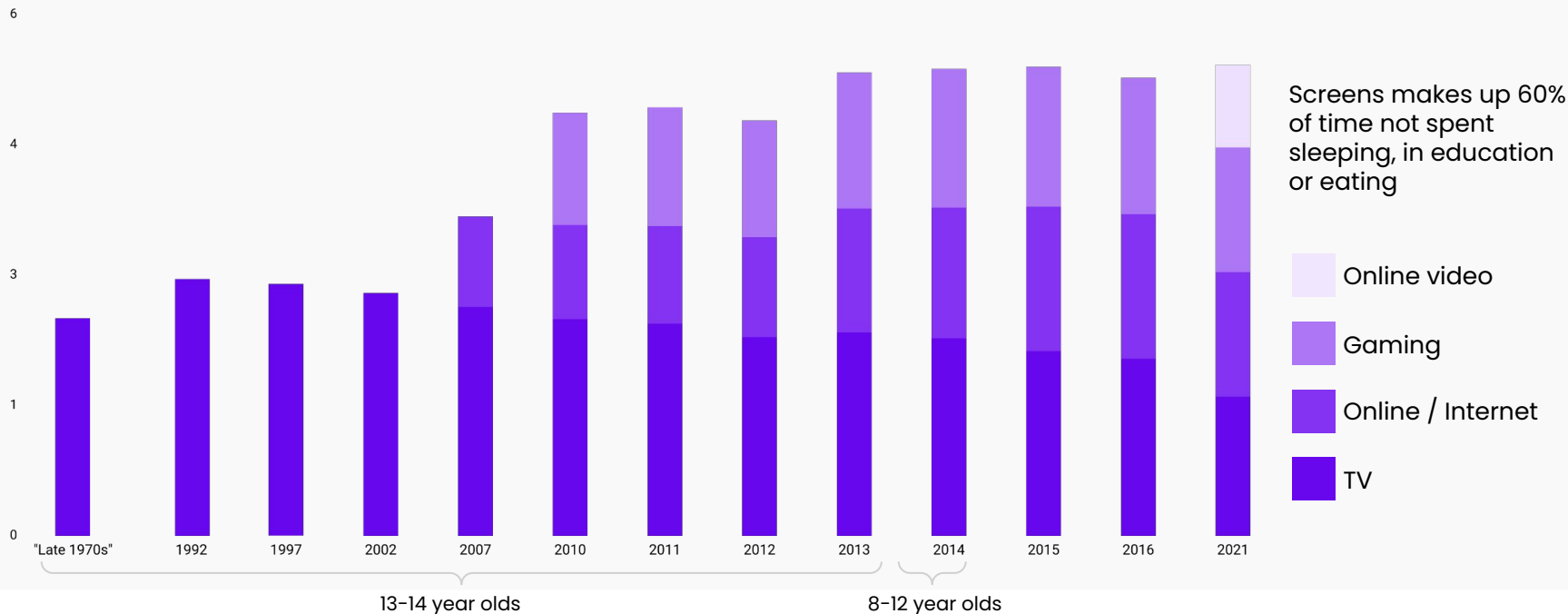
What happens if you raise a generation
while you're re-inventing the world?

1. **Tech, Regulation and the “Avatar Generation”**
2. **Attention Fragmentation and the End of “Kids TV”**
3. **“Dismissed as Toys” – Gen Alpha and the Future of Social**
4. **Shoppers and Makers**
5. **Gen A(I) and the Next Generation of Products**

All time high in screen time – although not that much more absolute time than a decade ago



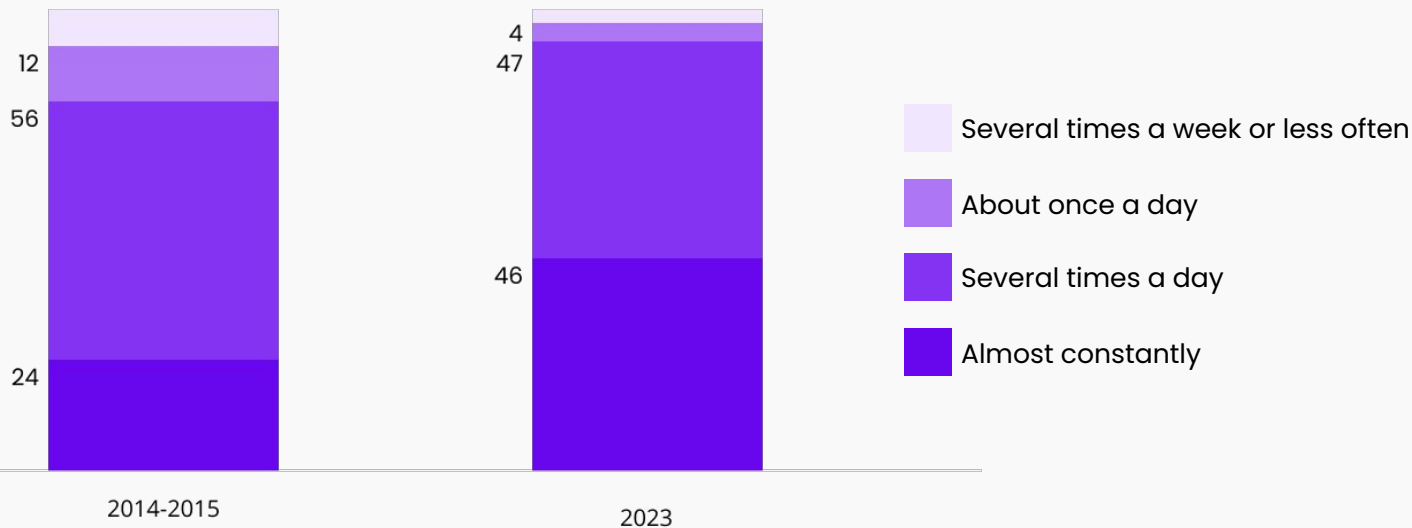
Average time spent with screens (hours), US 8th Graders / 8-12



But the change feels even more dramatic: half of teens say they are online “almost constantly”

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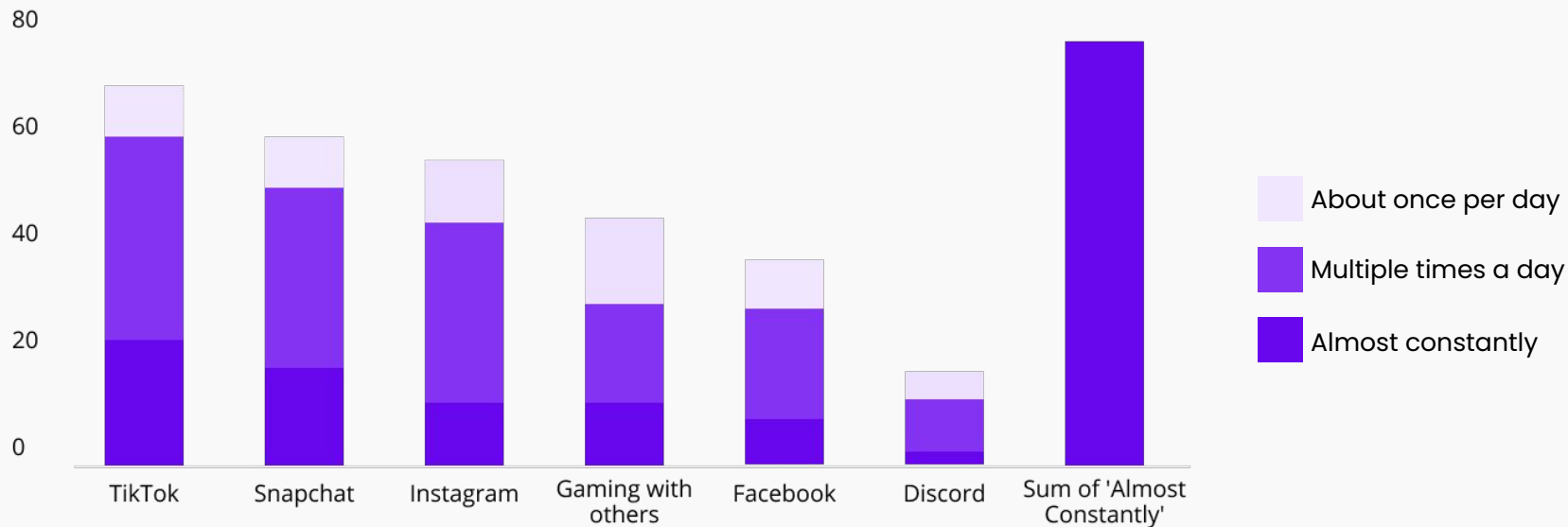
% of US Teens aged 13-17 who say they use the internet....



And a lot of that time is spent on social media...



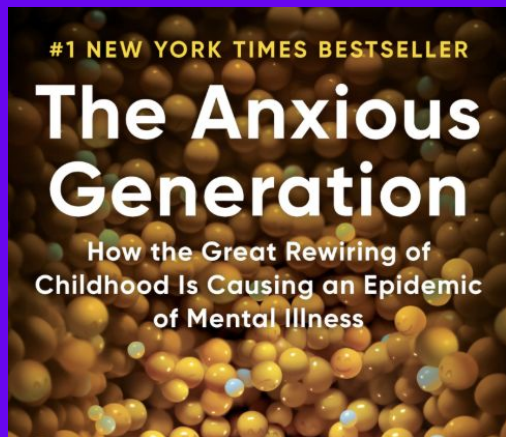
US Teen self reported social media usage (%)



We're worried!

"My claim is that the **new phone-based childhood.... is making young people sick** and blocking their progress to flourishing in adulthood. We need a dramatic cultural correction, and we need it now."

Jon Haidt, 2024, The Anxious Generation



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...not for the first time

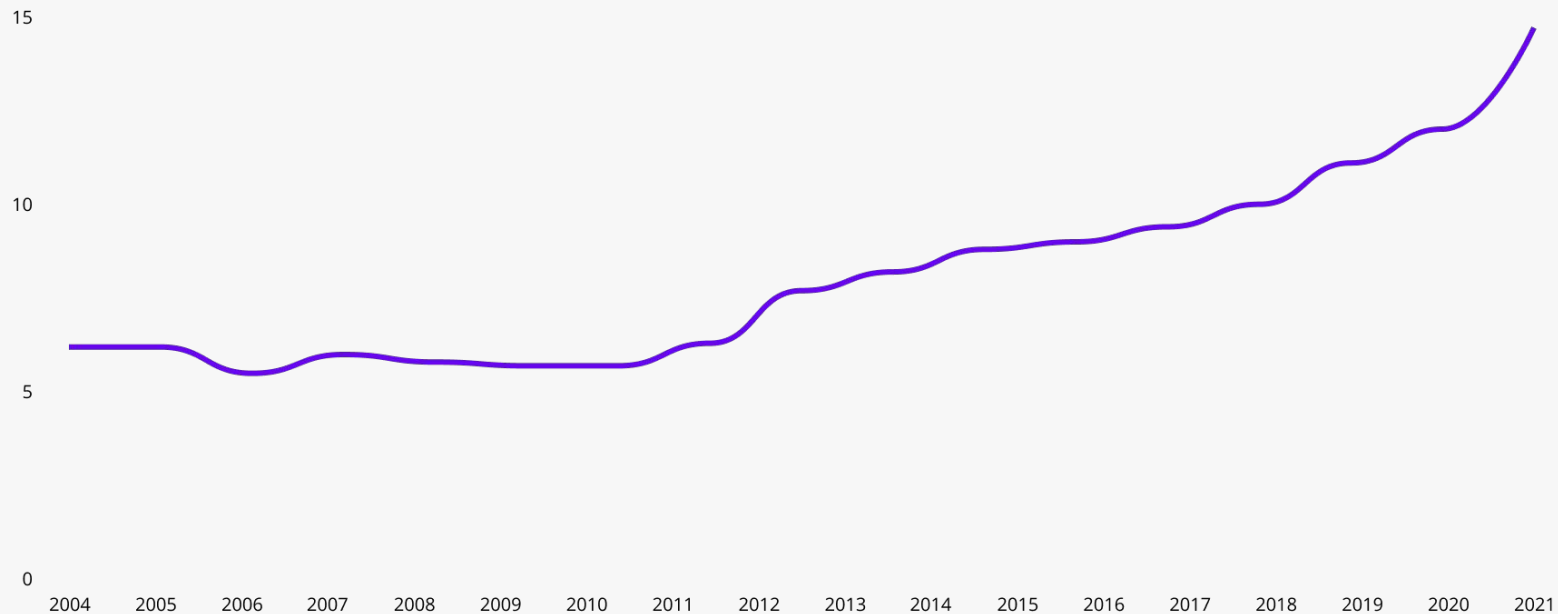
"Few parents are unaware of the lure of radio and of its effects upon the attitudes and ideals of children. **More and more parents are taking troubled note of the kind of radio to which their children have become accustomed...** They fear it is counteracting the best influences of home, church and school."

Dorothy Gordon, 1943, All Children Listen

This doesn't look great...



% Percentage of US youth ages 12–17 who had at least one Major Depressive Episode (MDE) with severe impairment in the past year



But do we really understand what's going on...?

There's broad agreement that child and adolescent mental health is not good - but much less consensus as to why...

Direct consequence of social media (and social news)?

Result of worse adult mental health & family stress?

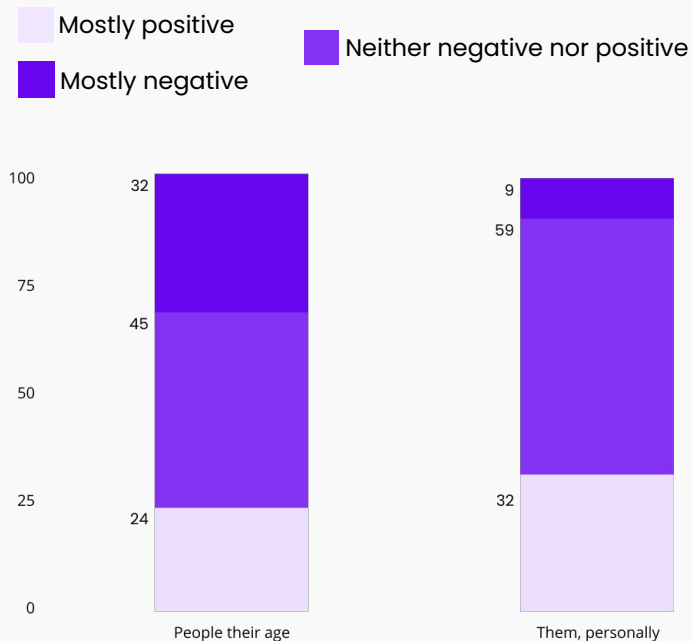
Better reporting / awareness?

Rising inequality?

Decline of play-based childhoods?

Simply asking Gen A strongly suggests social media is at least *part* of the problem

US Teen (13-17) assessment of social media effects ⁽¹⁾



And in particular....

57% of US girls using Snapchat have been contacted by a stranger in a way which made them feel uncomfortable ⁽²⁾

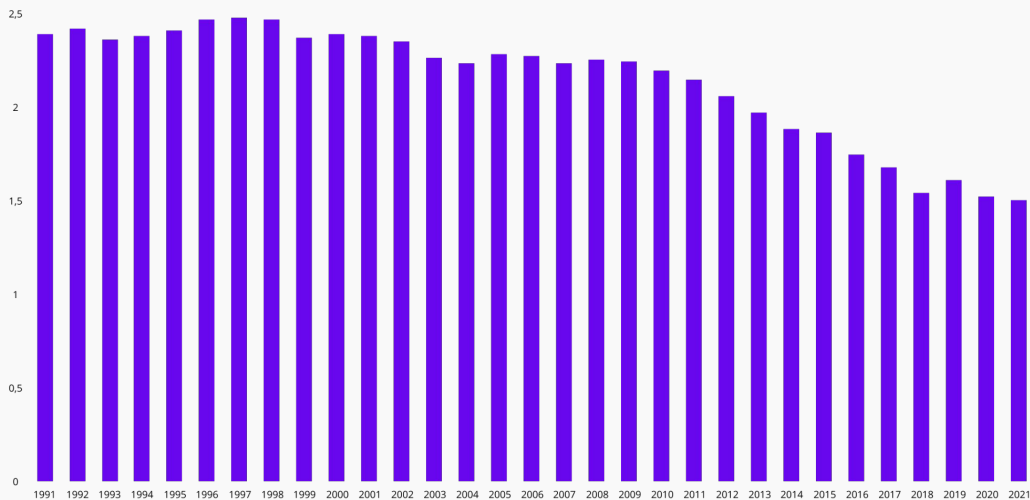
80% of US teens report that social media at least sometimes worsens 'appearance' pressure (vs 40% who say it sometimes helps) ⁽³⁾

44% of UK kids say they're worried they spend too much time on at least one online service ⁽⁴⁾

An “Avatar generation”? The more time kids and teens spend online, the less time there is out in the world



Weekly social outings, US 8th grade students⁴



Driving later

20% decline since 2010 in car trips by 17-20 year olds (UK)¹



Having sex later

32% decline between 2013 and 2023 high schoolers who have “ever had sex”²



Leaving home (a bit) later

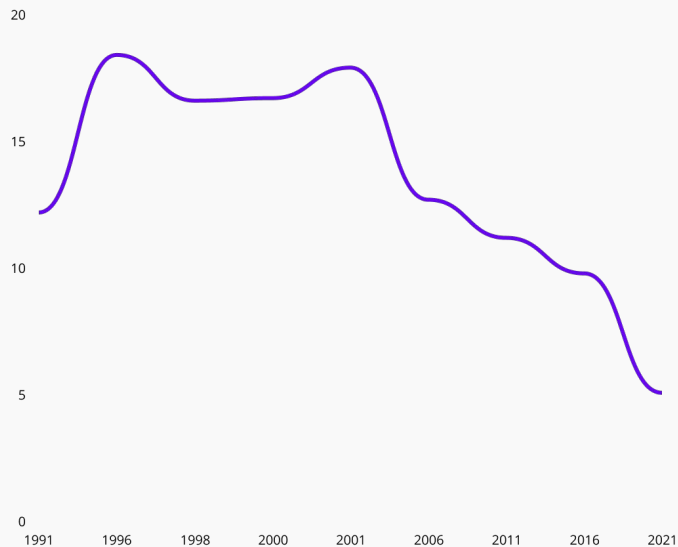
8% decline 2010 to 2024 in 18-24 year olds not living at home (from 47% to 43%)³

Some changes we like: longer term pattern of declining risky behaviour

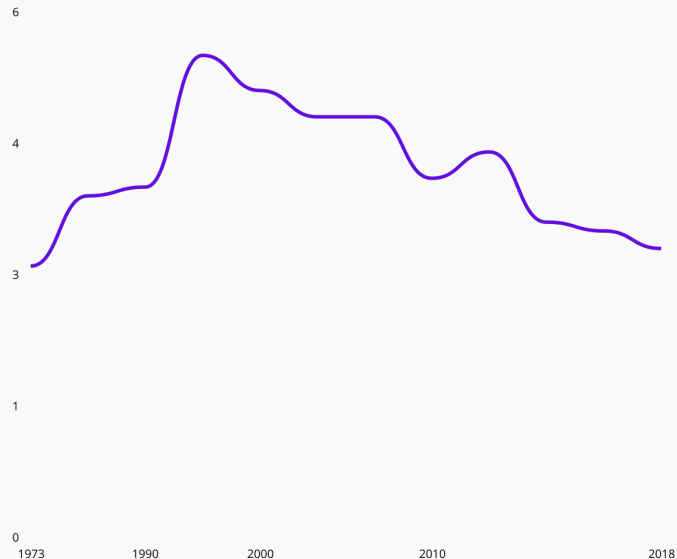


And the less you're "out in the world", the fewer opportunities there are to get into IRL trouble.

% of 10th graders reporting trying any drug other than marijuana in the last 12 months



Out of school suspension rates in K-12, %



We'd like to regulate something. But what?



Worry

**Social media
inherently
damages mental
health?**

**Too much screen
time?**

**Kids can be
approached by
strangers?**

**Some content kids
are consuming on
the internet is
harmful?**

**The average quality of
content kids are
consuming on the
internet is low?**

Potential
solve

Social media bans /
age limits

Time limits (but they
better include TV
too...)

Mandatory settings
for social features

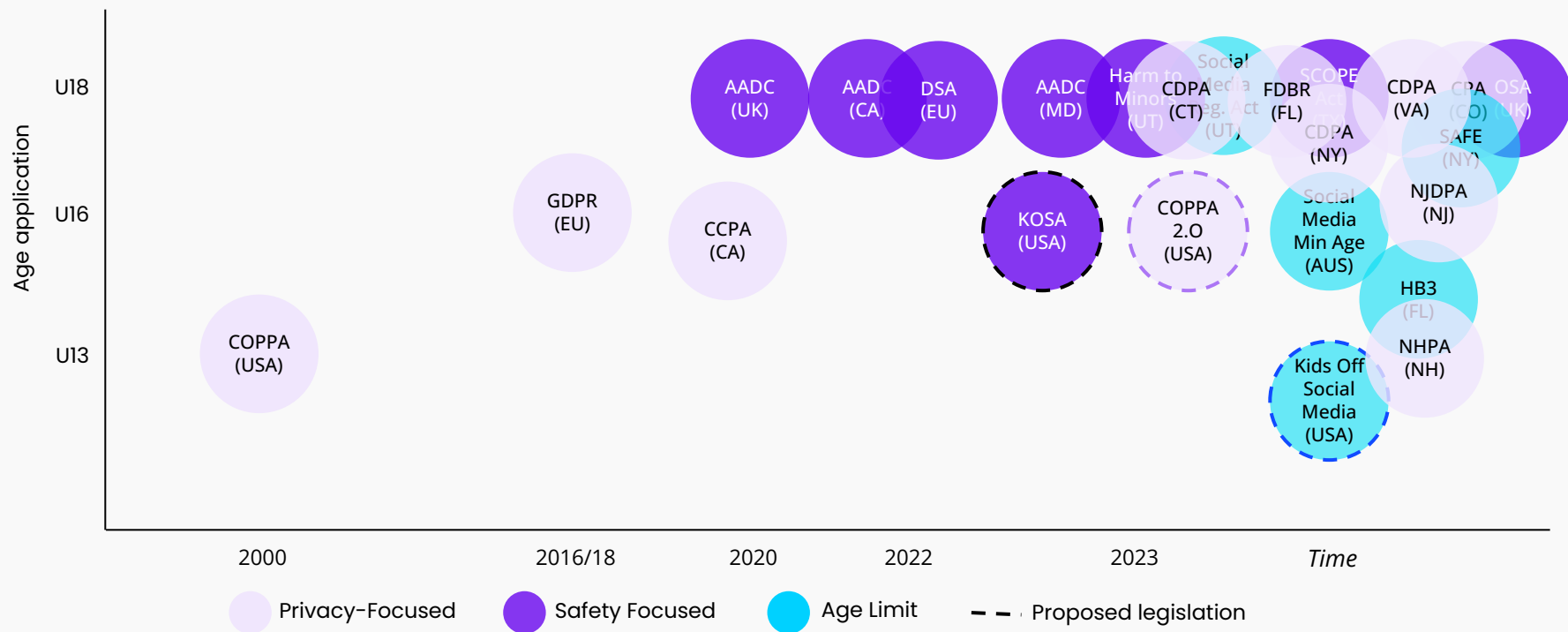
Age limits / limited
profile settings /
content moderation

Mandated content
policies??
(Really not clear this is
true)

A regulatory battle that's just getting started



Actual and prospective legislation impacting kids' online services



But none of this works
if we don't **rethink age
verification**

Create account
Step 2 of 5

Birthday

January 1, 2000

Continue

October	29	1997
November	30	1998
December	31	1999
January	1	2000
February	2	2001
March	3	2002
April	4	2003

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Everyone knows **kids aren't watching tv any more**

**But the consequences for loyalty and fandom
formation are underappreciated**

The choices kids make count. Life long fandoms are established before the age of 16

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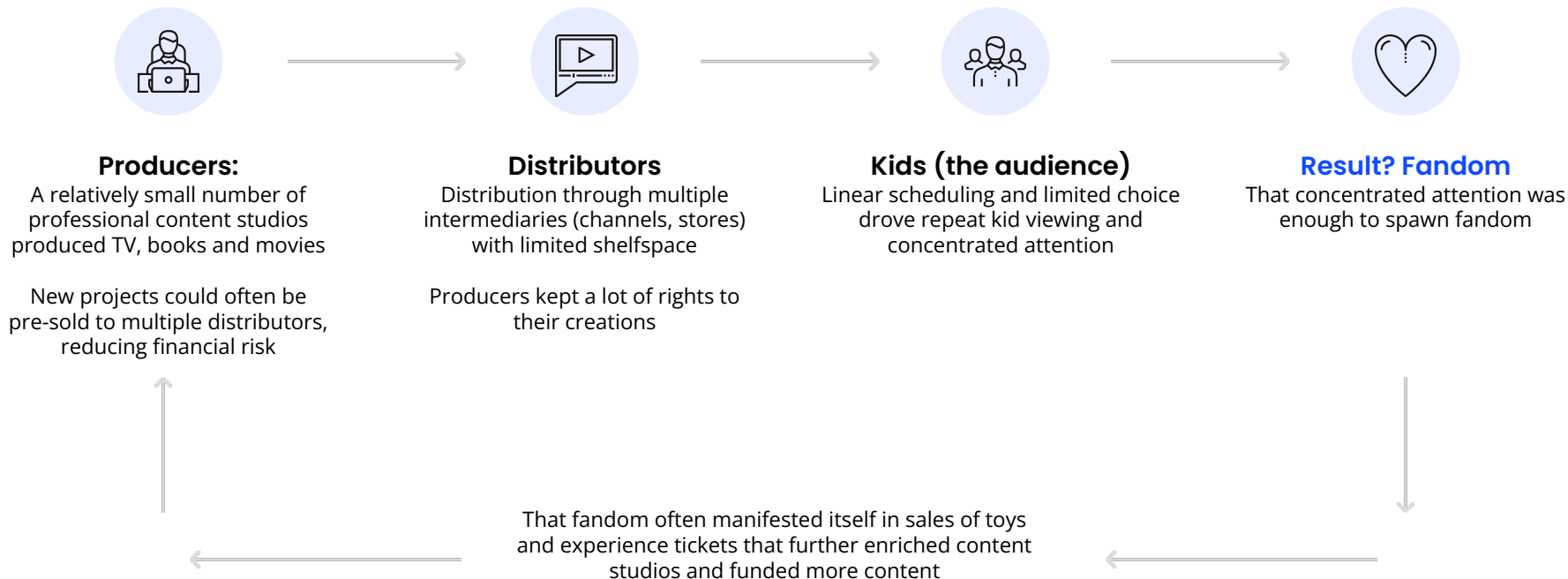
When did you...

- Fall in love with your favorite band?
- Adopt a sports team?
- Decide which brands were cool?
- Get into Marvel, or Star Wars or LOTR?

For most people, these decisions get made well before the age of 16...

Millennials and (most of) Gen Z grew up in an era when concentrated attention created concentrated fandoms

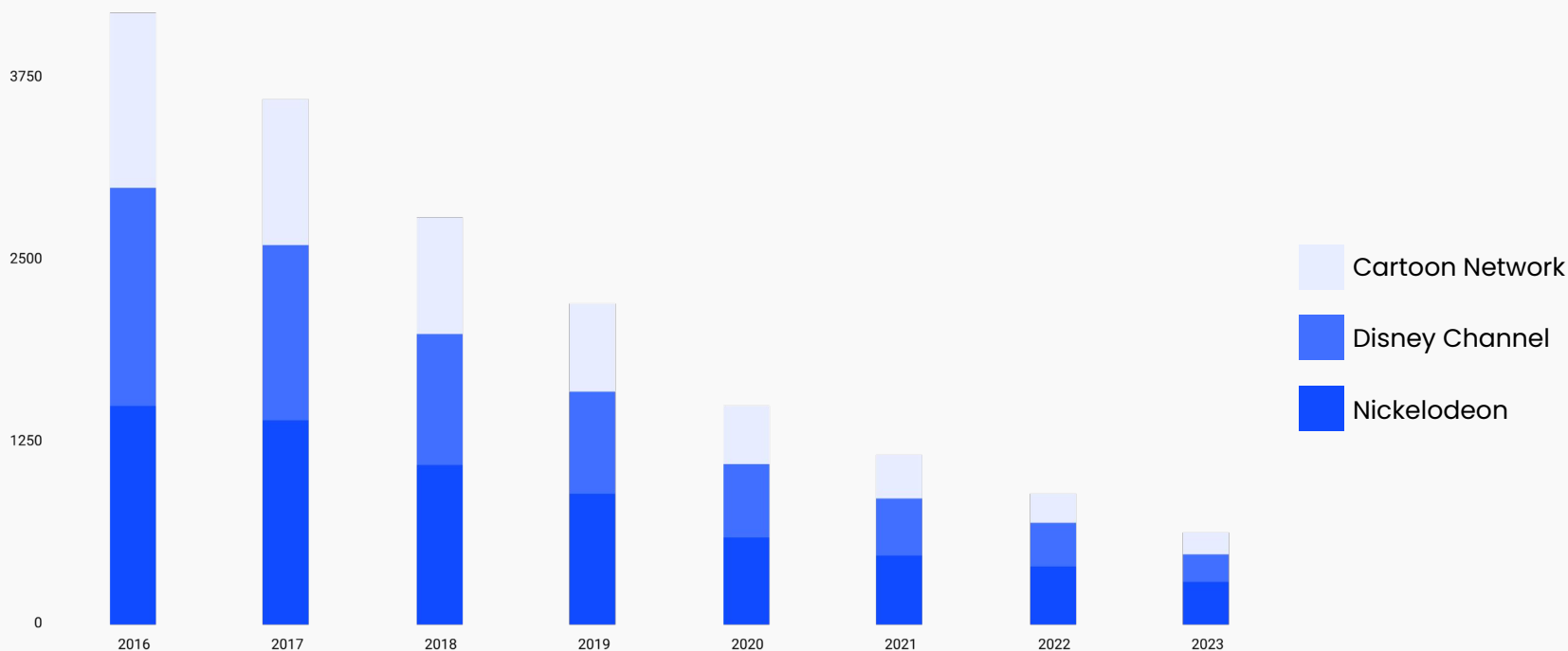
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Linear TV was a powerful vehicle for concentrated attention. No longer.

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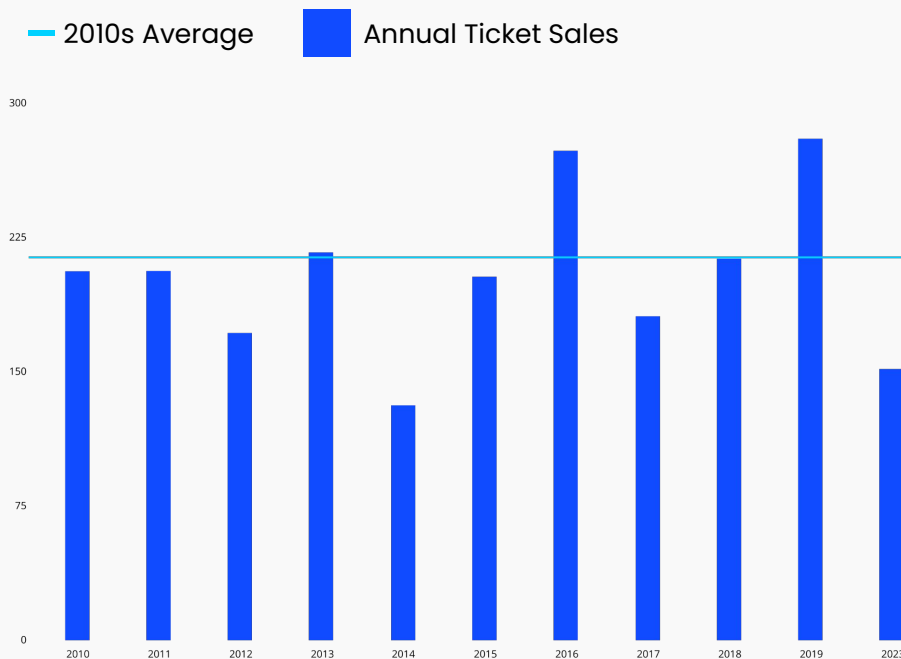
Nielsen ratings, selected kids' channels



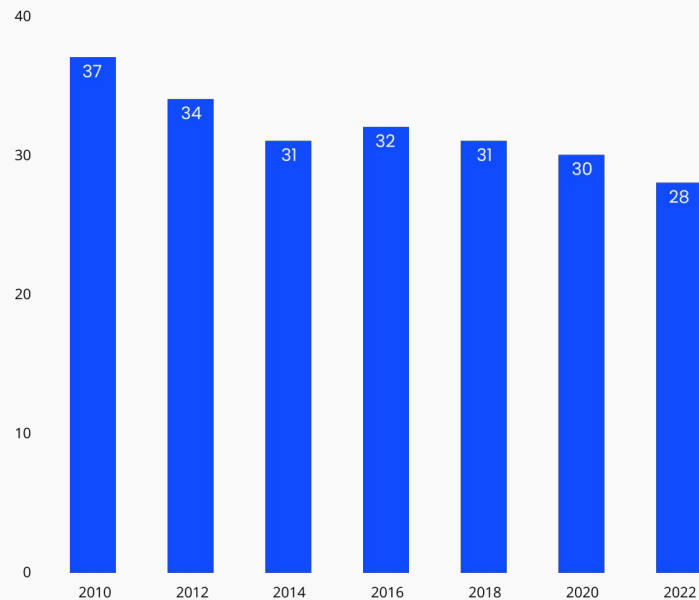
Cinema and reading aren't looking too good either



Ticket sales, kids fiction movies (m)

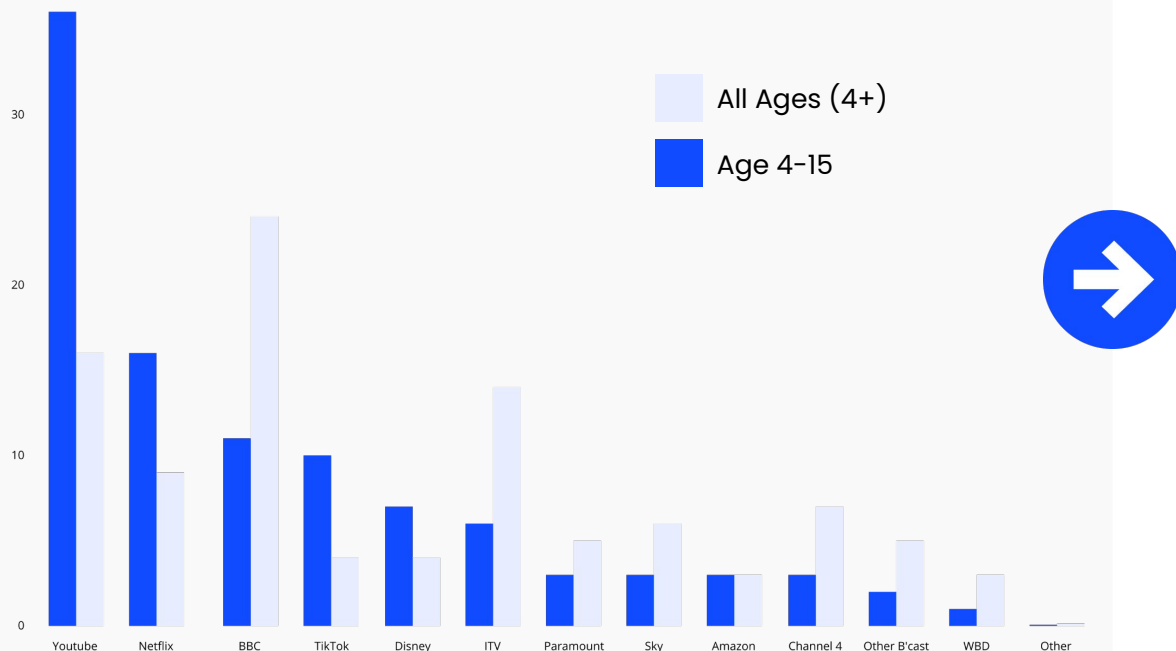


"Frequent Readers" as % of young people aged 6-17



Instead, “kids tv” is being replaced by general audience digital platforms, particularly YouTube

% of time spent watching video services, kids (4-15)
vs all ages and quotient kids to all ages, UK, 1H 2024

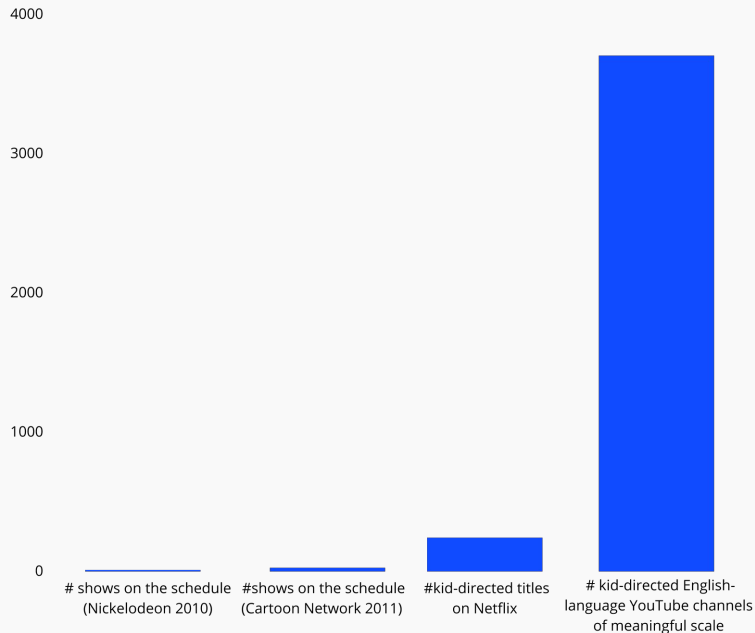


Kids' attention has shifted to a small number of global tech platforms which offer content for both kids and adults, with creator-led platforms like YouTube and TikTok wildly over-indexing

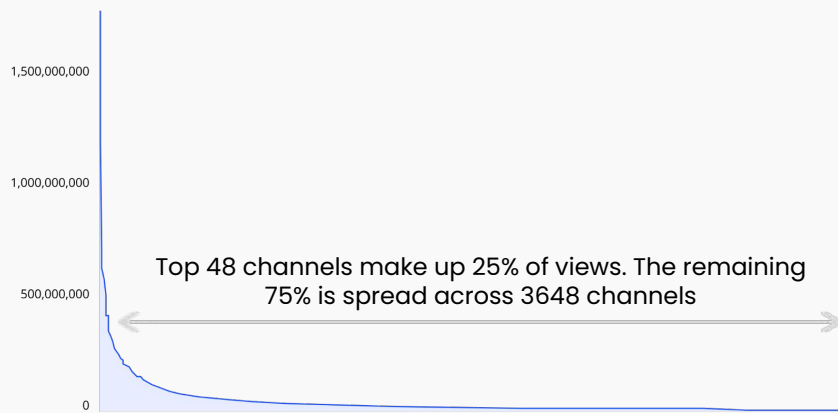
Gen A have a lot to choose from – resulting in very fragmented attention



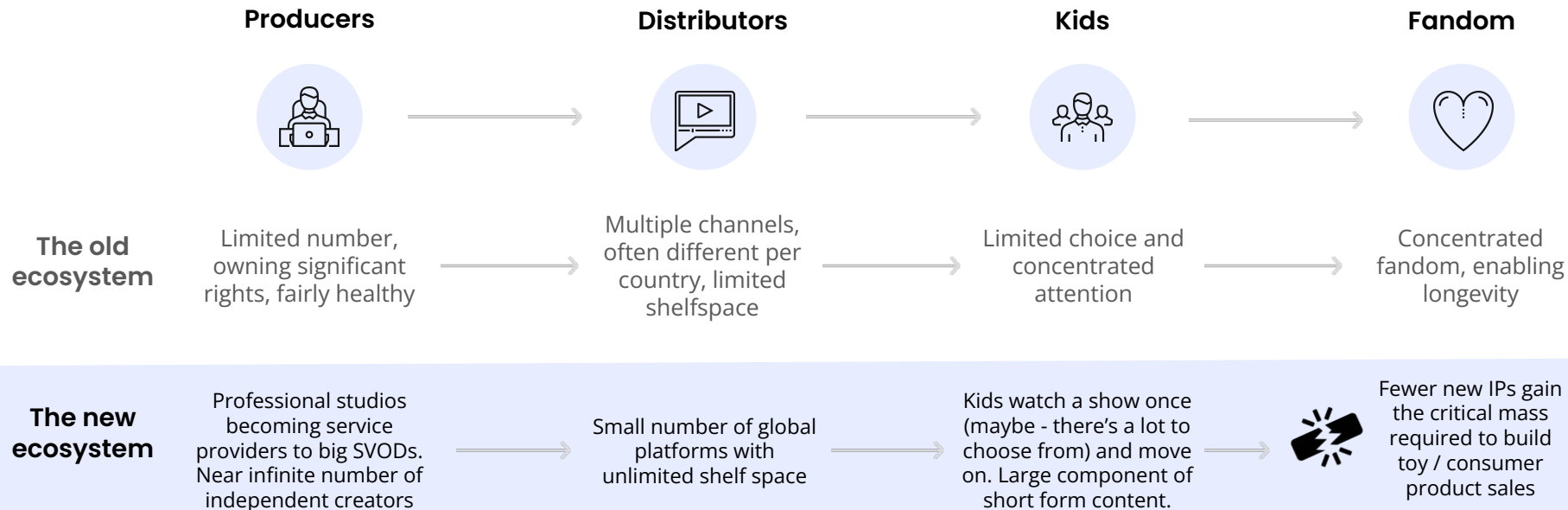
Available kid directed IPs, selected services



Kid-directed YouTube channels, by views

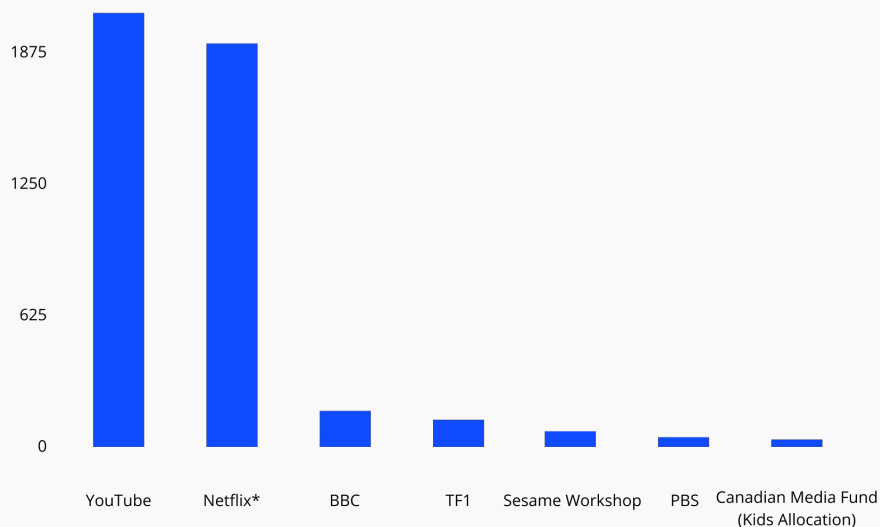


Driving a breakdown in the ecosystem of concentrated fandoms



Independent kids producers have lost market power as spend concentrates with global streamers

Annual kids content spend (\$m. estimated 2024)



Source: Company reports, SuperAwesome analysis. * Netflix assumes kids content 75% of the cost of other Netflix content

Children's TV In Crisis: Netflix, YouTube, BBC & Others To Be Summoned To Summit Exploring How To Resuscitate Genre In The UK

By [Max Goldbart](#)
December 6, 2023 1:00am



"Paw Patrol": UK execs worry kids are becoming "culturally swamped" by shows from outside the country. Nickelodeon/courtesy Everett Collection

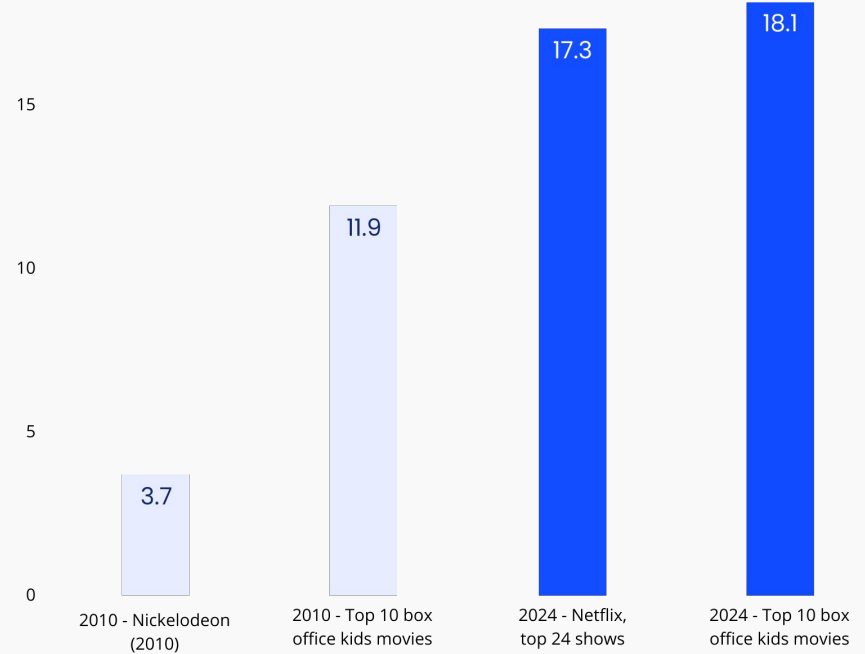
EXCLUSIVE: The biggest players in UK children's TV are being asked to attend a summit early next year to try and resolve grave funding issues amidst existential questions over the genre's future.

The Children's Media Foundation (CMF) has been preparing the summit for months including via a series of consultative meetings with all the major broadcasters, producer groups and lobbyists from August to October. The likes of Netflix and YouTube, which have been hugely influential in shaping the modern children's TV sector, will also be invited to attend. Organizers are concerned

It's getting harder to break new IP. Paradoxically, in a tech-forward world, we're reliant on 'old' IP

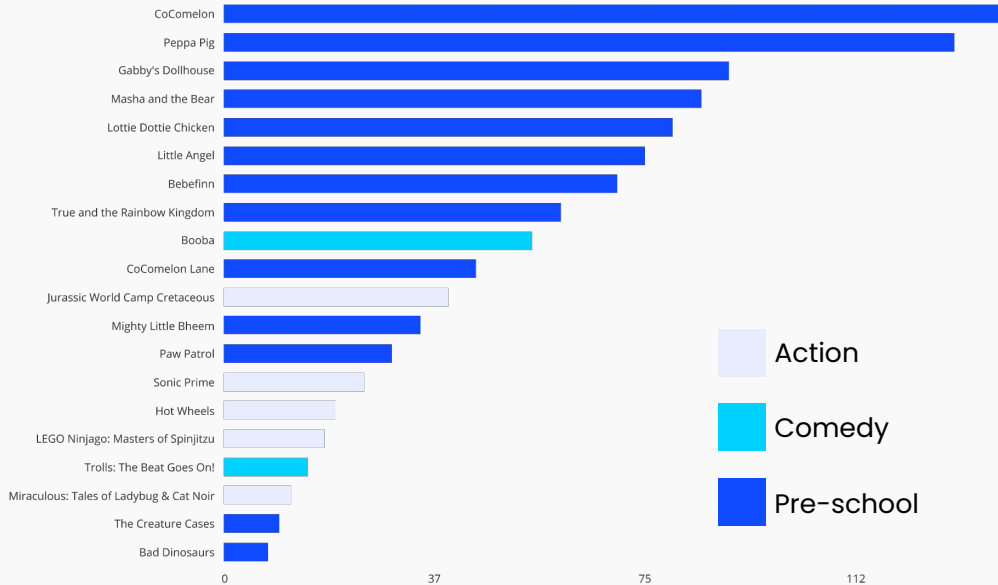
With new shows harder to break and content producers less able to take risk, fewer brand new IPs are being created

Years since creation of original IP, selected channels, 2010 vs 2024



At the key ages for fandom development, Gen A aren't watching "kids" content at all

Top Netflix U16 directed shows, by views, H1 2024



"Kids" has come to mean "pre-school" - over 80% of views for kids content on Netflix are for pre-school shows. Meanwhile, anecdotally at least, 11 years old are far more likely to be watching *Wednesday*...



We've entered a new era of fragmented fandoms

We asked a sample of US kids and teens what fandoms they felt “connected” to.

74%

named a fandom not referenced by a single other person in the survey

Awesome Intelligence, Fandoms Research, 2025

New IP is still emerging – but it looks very different

“Skibidi Toilet” - a YouTube originated series by a single creator, starring a human-headed, singing toilet. **65bn views so far.**

From this...

Creative control	Top-down and total
Storytelling	Planned and elaborate
Production value	High
Tone	Curated by few, to many
Production cycles	Long, but channel-dependent
Cross-media expansion	Slow and controlled with select partners
Content length	Long

To this

Loose

Emergent, fan-driven, lore-first

Low (but improving)

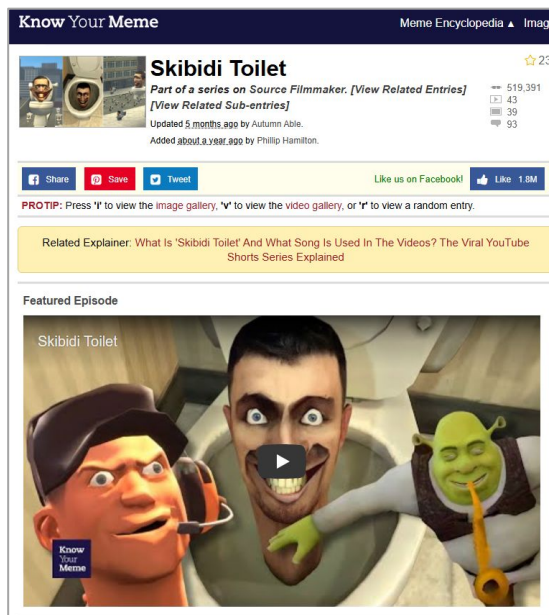
Anything goes.

Short (but getting longer)

Instant (through UGC)

Short (but getting longer)

Internet-native IP demands increasing levels of cultural savvy



Impacting more than just media – toy companies are finding there's not enough fandom amongst kids

The 'professional' content ecosystem isn't spawning enough IP that kids *love* rather than just watch, leaving toy companies increasingly reliant on nostalgia and older buyers

"This resilience in our business model has been years in the making, strategically shifting our mix towards games, digital, and IP licensing – the future of play.

This is where the consumer is heading, and *we're following our fans as they age up* and look for their favorite brands on digital platforms"

Chris Cocks, Hasbro CEO

FORBES > BUSINESS > RETAIL

Will Kidults Save The Toy Industry This Christmas?

Joan Verdon Senior Contributor @

Joan Verdon is a veteran retail reporter based in Northern New Jersey.

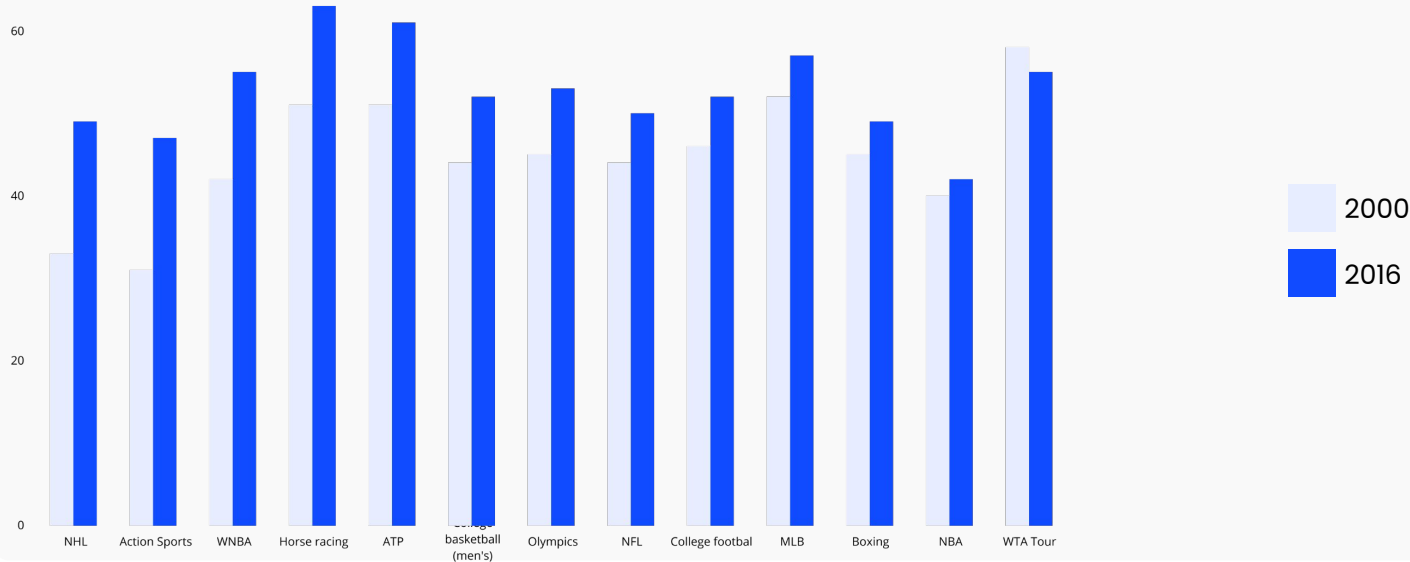
Follow



Dec 24, 2022, 12:16pm EST

Impacting more than just media (pt 2.) – sports franchises can't rely on TV to build fandom with the next generation

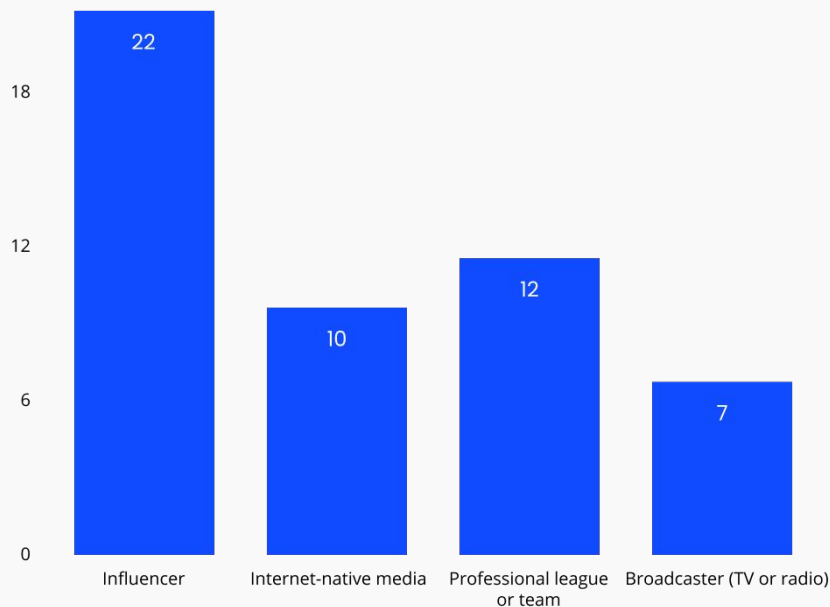
The average age of sports viewer on linear TV is only increasing...
Kid-directed YouTube channels, by views



And traditional players are far from guaranteed to dominate attention on new platforms



Influencers are the most popular YouTube sports content providers. Make up of the top 50 most watched kid-directed YouTube channels about sports



The soccer example:



@futcunch
Top ranked football channel, 188m 30D VIEWS



@premierleague
Second ranked football influencer, 101m 30D VIEWS

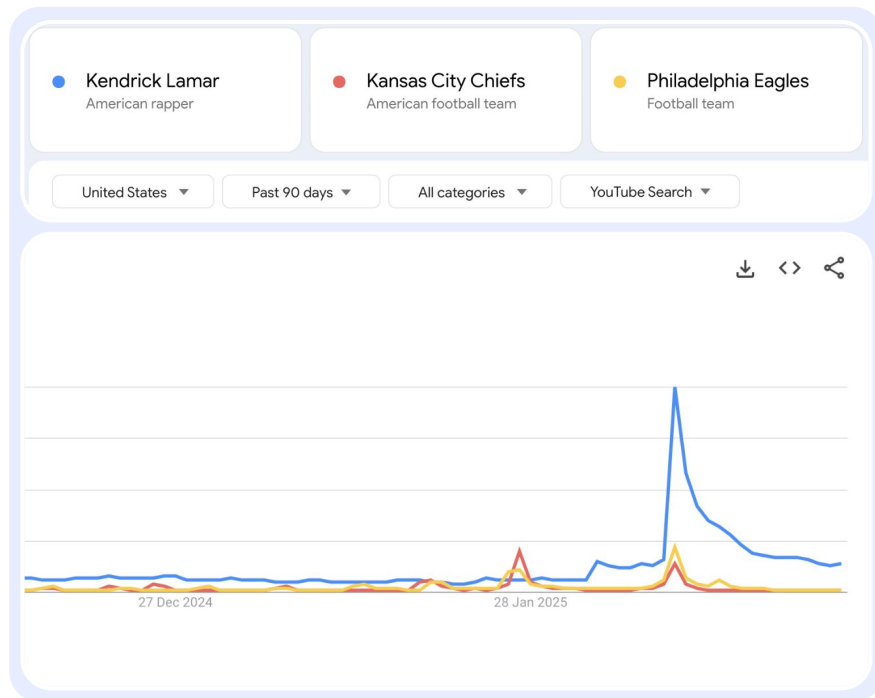
Who won the Superbowl?

Sport leagues are hacking a fragmented attention ecosystem by co-opting creators and influencers:

Kendrick attracted twice the search volume of either of this year's Super Bowl teams

While the Paul-Tyson fight was the “single largest acquisition moment” in [Netflix’s] history” ⁽¹⁾

But long-term, who's the star and who's the support act?



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Disruptive innovation is often dismissed as trivial

But pay attention to gen alpha's choices and behaviors and we can see the emerging contours of a very different social landscape

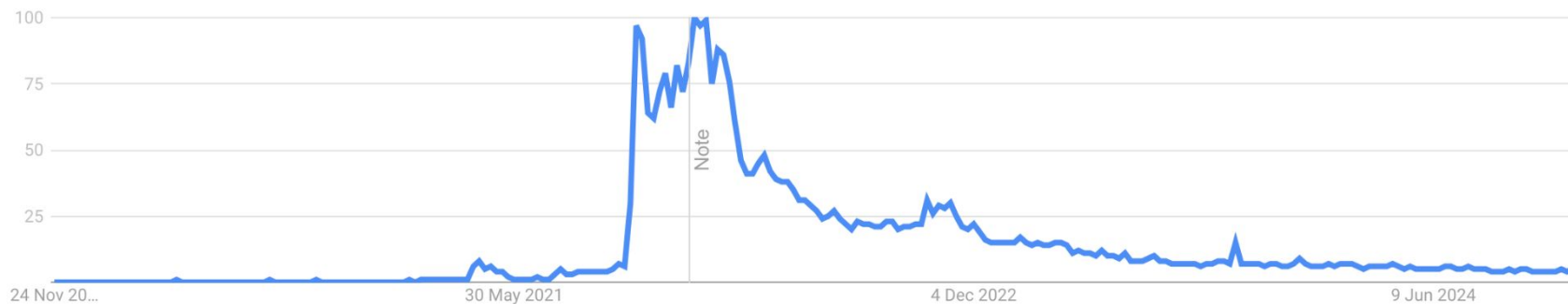


**“The defining quality of the metaverse
will be a feeling of presence”**

Mark Zuckerberg, Meta CEO, October 2021

The Metaverse is dead...

Interest over time ?



Or is it?

“The reason big new things sneak by incumbents is that the next big thing always starts out being dismissed as a ‘toy.’”

Chris Dixon, a16z

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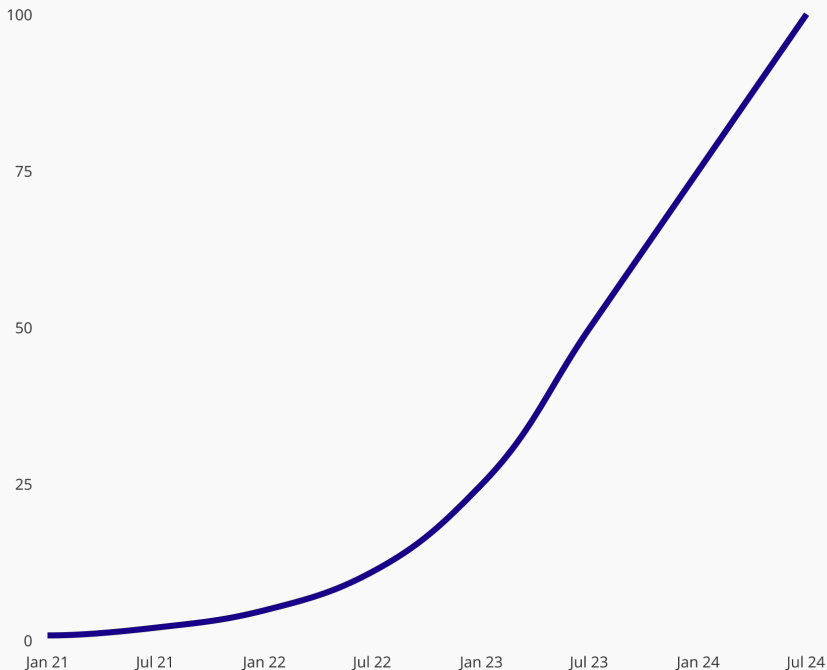
Source: [Chris Dixon](#).

Confidential – © SuperAwesome 2013–2025

“Dismissed as a toy” – Part one

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Gorilla Tag – a VR game largely played by kids – has grown into a sleeper hit
Cumulative revenues, \$m



“Many in the field, both inside and outside Meta, were hostile to Gorilla Tag because it didn’t look like their vision of VR success. When the market is talking, you should listen!”

[John Cormack](#)

“Dismissed as a toy” – Part two

“My assumption is that most devs think Roblox is for kids and so don’t bother playing it unless they have children in their lives.... Like many things made ‘for kids’ **it’s not taken seriously by adults**”

Josh Ling, [Adopt Me](#)

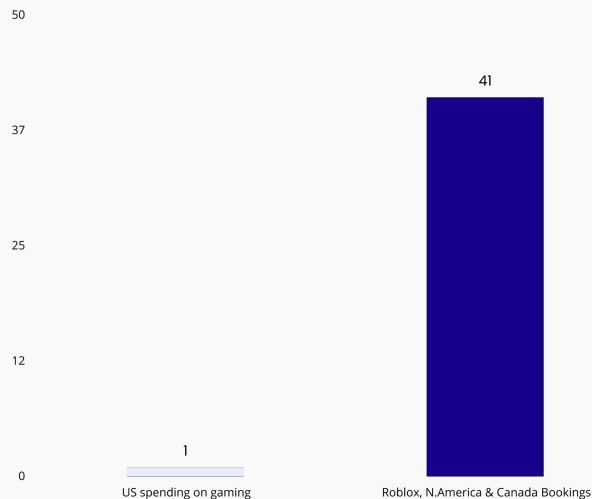


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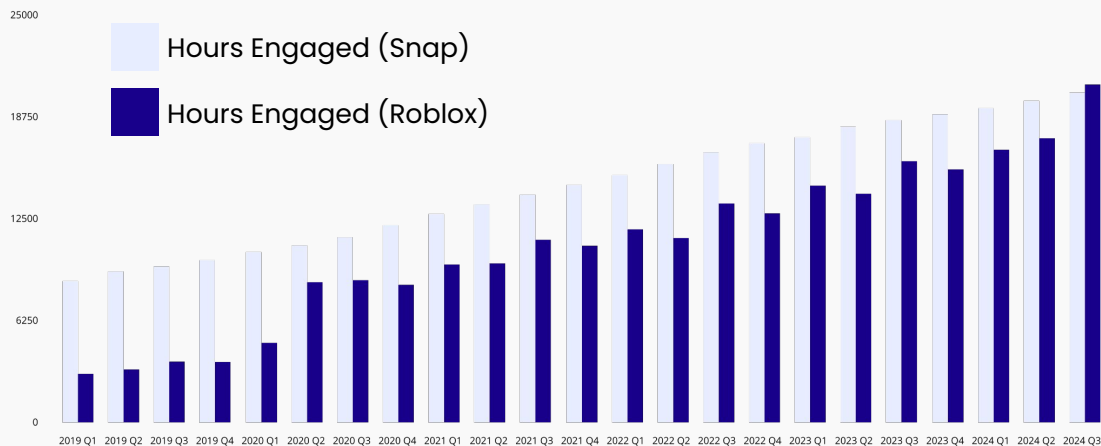
Roblox is beating out competition on both revenue and engagement



Compound annual growth in spending, 2020-23

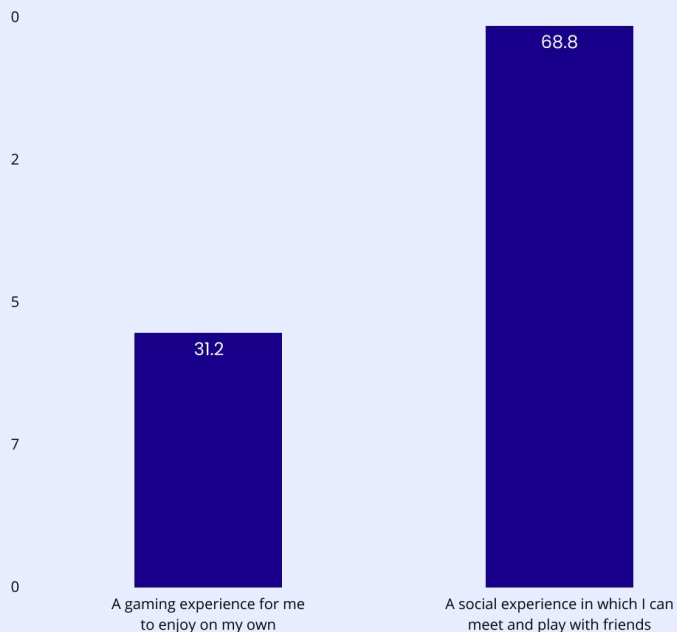


Quarterly hours engaged, Roblox vs Snap



An inherently social platform

Which of the following best describes how you view Roblox?



Source: [Bespoke Intel](#)

And it's... pretty good?



If you designed a platform to answer to Jon Haidt's criticism of social media it might look like Roblox

- Unstructured free play
- Creative
- No likes, shares or asynchronous reward
- No body image issues
- Anonymous by default
- "Off by default" direct messaging

**And it may not be 3D – but
there is a sense on which
Roblox users do enjoy “a
feeling of presence”**

“Over half (56%) of Gen Z respondents say styling their avatar is more important to them than styling themselves in the physical world (as compared to 42% answering a similar question last year)”

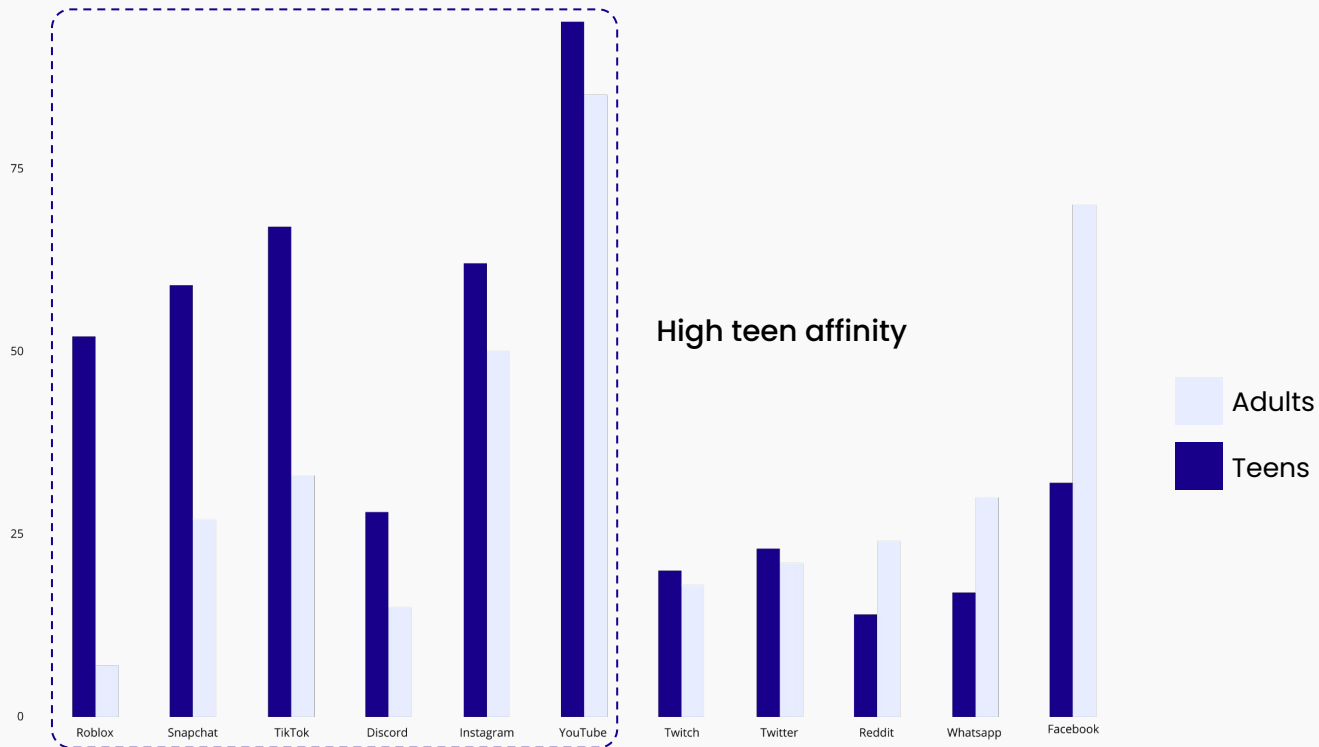
35% of young audiences in the US say they prefer an in game item over the real version of the same thing



Along with Snap and Discord, Roblox forms a key part of the teen social stack



Teen social: % of US teens using selected social platforms vs % of US adults



The age of semi-social media

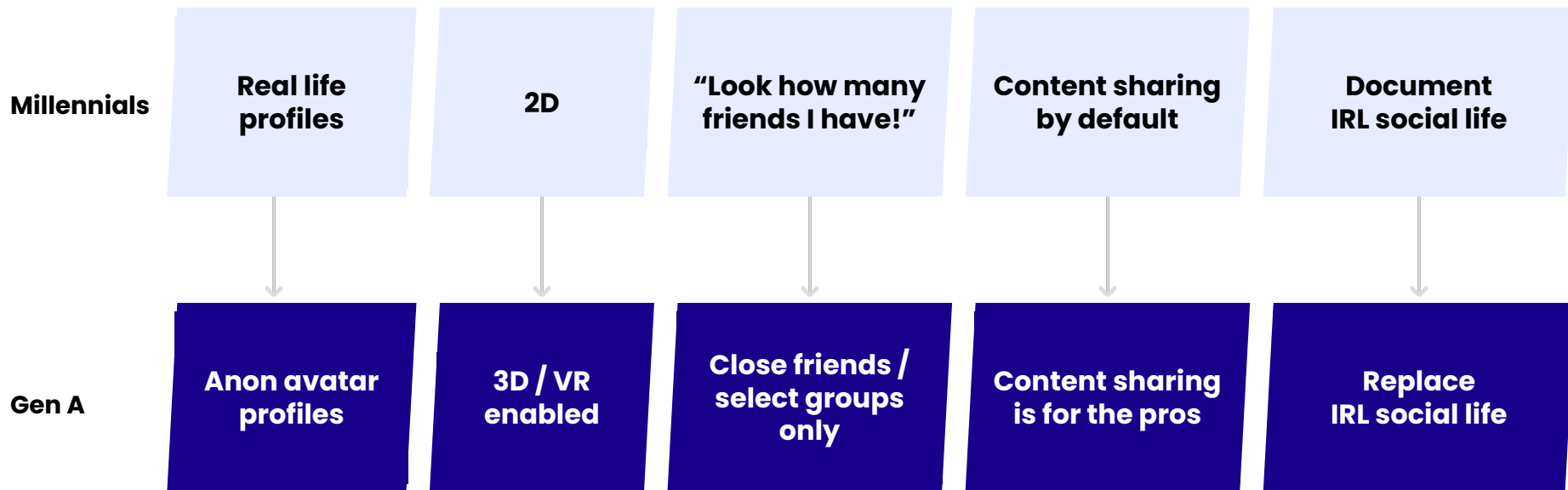
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“Continuing a trend seen... over the last few years... children’s caution about what they shared publicly online had further increased, with social interaction now confined mostly to chat apps and gaming.”

OFCOM, [Children’s Media Lives](#), 2024

Emergent social behaviours

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"Toys" for Christmas... (2024 edition)

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Top ranking | iOS - iPhone United States - Overall Last Update: (Dec 27, 2024 3:00pm UTC+8) | Data delivery schedule

Select objects to compare



Show change metrics



Change (Value) | Period over period

Free

View all

1		Block Blast! Hungry Studio	=
2		Meta Horizon Meta	^ 6
3		Amazon Alexa Amazon	^ 11
4		Frameo Frameo	^ 11
5		Aura Frames Aura Home	^ 13
6		mytonies Boxine	^ 19
7		TikTok TikTok Pte Ltd	v 2
8		YouTube: Watch, Listen, Stream Google	^ 2

Paid

View all

1		Heads Up! Warner Bros	=
2		Minecraft: Play with Friends Mojang	^ 1
3		Balatro PlayStack	v 1
4		Plague Inc. Ndemic Creations	=
5		Animal Crossing: Pocket Camp C Nintendo	=
6		Papa's Freezeria To Go! Flipline	^ 3
7		Geometry Dash RobTop	=
8		Bloons TD 6 Ninja Kiwi	=

Grossing

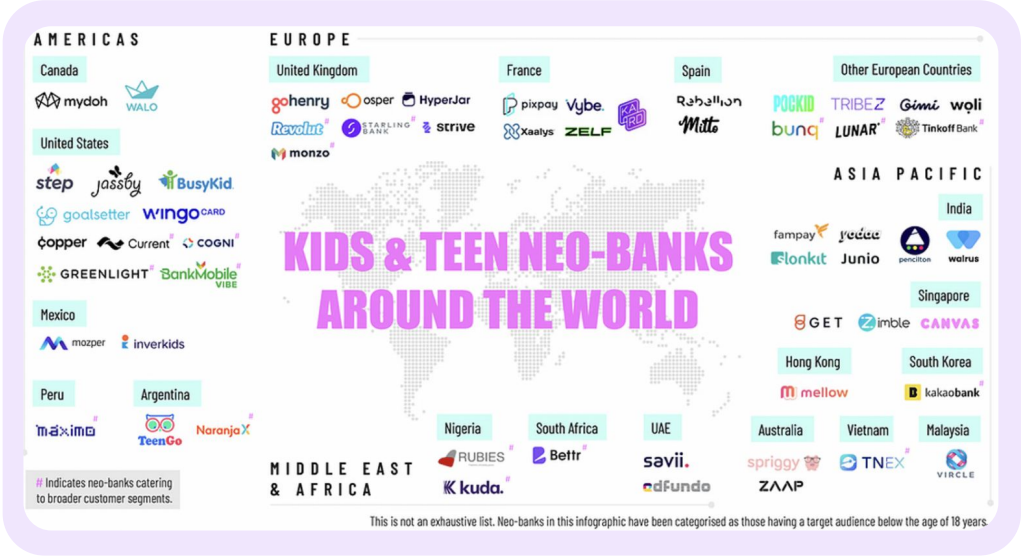
1		Roblox Roblox
2		TikTok TikTok Pte Ltd
3		YouTube: Watch, Listen, Stream Google
4		MONOPOLY GO! Scopely
5		Last War: Survival Onefun
6		Pokémon TCG Pocket Pokemon
7		Royal Match Dream Games
8		Max: Stream HBO, TV, & Movies HBO

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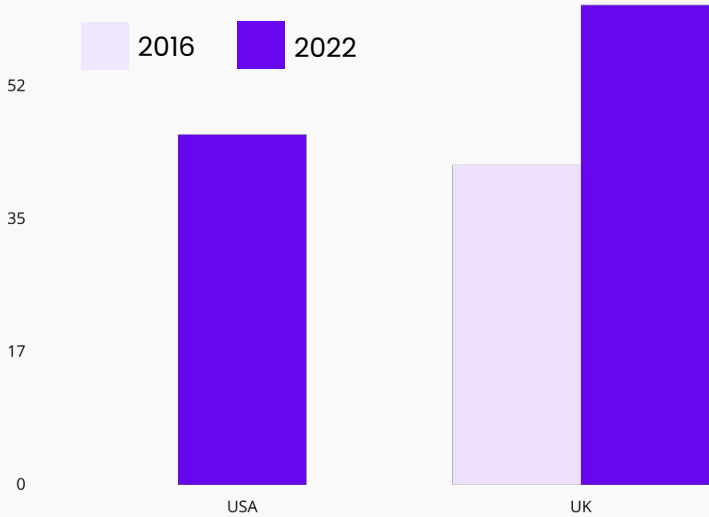
Gen Alpha are doing more online than ever before

**We're very focused on what they're watching. But
we tend to miss what they're **buying, making, and
selling...****

Kids are now pretty widely banked



Kid debit card penetration, US & UK



*Source: SuperAwesome primary research, n=292, UK Money & Pension Service

\$20bn in annual youth purchasing power in the USA & UK alone



	AGE	YEARS	PEOPLE	SPEND/HEAD/MONTH	OPPORTUNITY
USA					
	6-9	3	10770	\$25.00	\$3,231,000.00
	10-12	3	10770	\$50.00	\$6,462,000.00
	13-15	3	10770	\$65.00	\$8,400,600.00
					\$18,093,600.00
GBP					
	6-9	3	2100	\$26.00	\$655,200.00
	10-12	3	2100	\$26.00	\$655,200.00
	13-15	3	2100	\$39.00	\$982,800.00
					\$2,293,200.00
GRAND TOTAL					\$20,386,800.00

More than just pocket money: Making real money, increasingly online

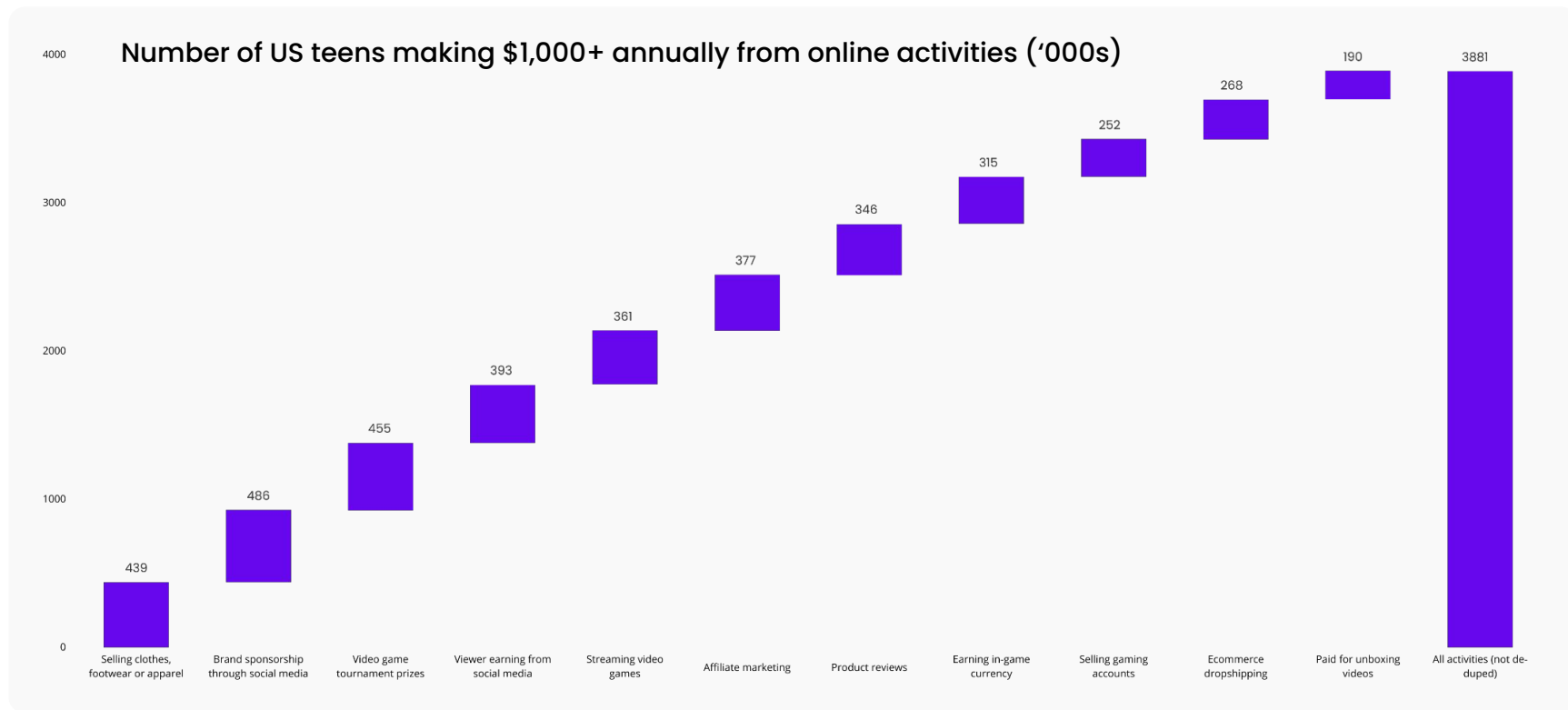


US monthly income by type, 6-18 year olds, 2021



C. 40% of earned income coming from online hustles or content creation

The creator elite: Around 10% of teens are making \$1,000+ a year



More than just purchase influencers: Two thirds of kids buy things independently

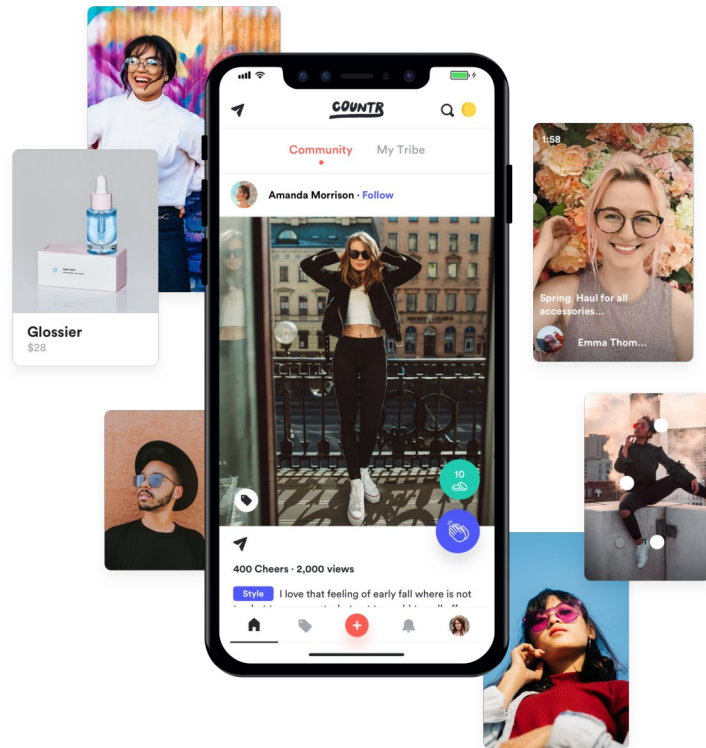
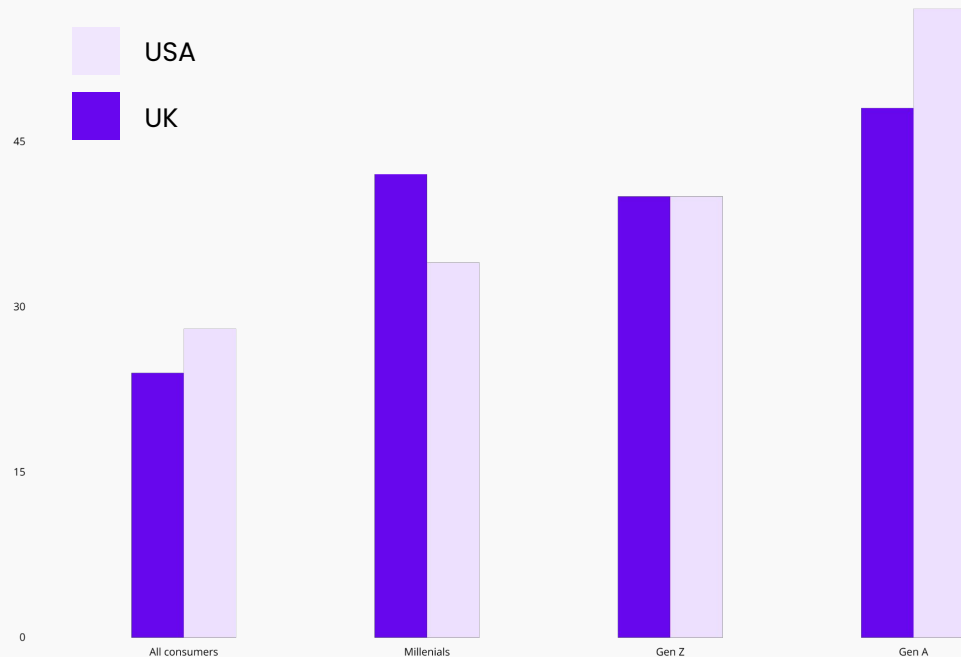


	8 YEAR OLDS		14/15 YEAR OLDS	
	USA	UK	USA	UK
% of children making payments independently	63%	62%	64%	71%
#1 place to buy	Physical Stores	Physical Stores	Social Commerce	Physical Stores
#1 method of payment	Cash	Cash	Debit Cards	Cash

How to spend it? the younger you are, the more discovery takes place via social

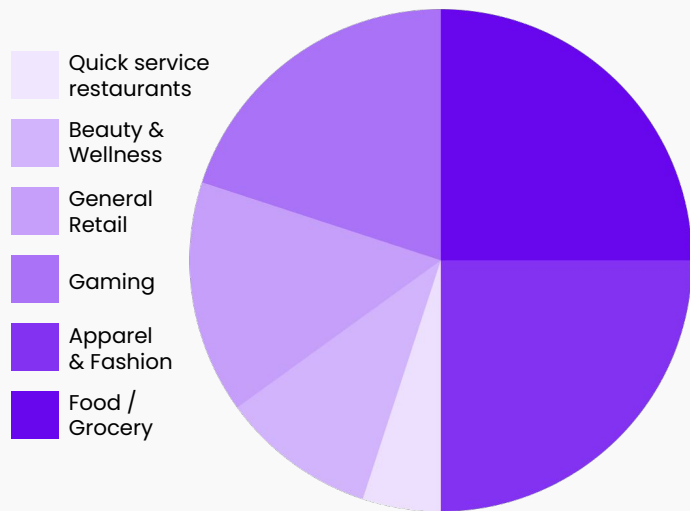
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AWESOME**

% who usually receive peak season deal information via social media

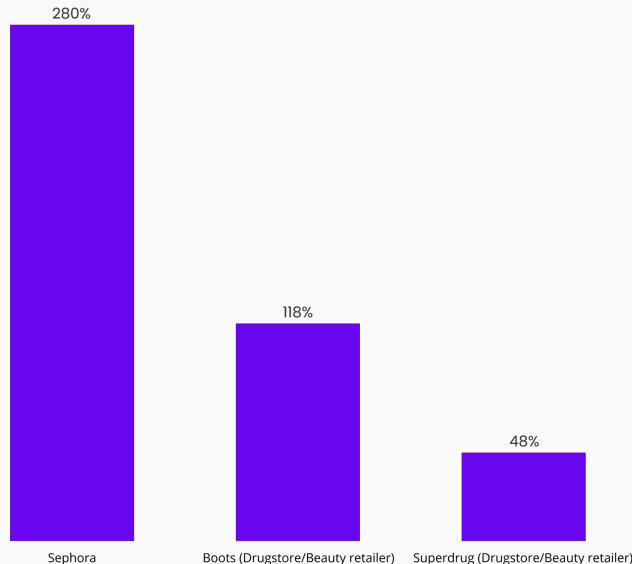


“Across all age and affluence groups there is a large focus on spending more on appearance”

Where kids (6-17, UK) are spending their money - top 20 merchants by category



Spend increases 2023-24 (UK kids and teens, 6-17) - selected retailers



Not for the first time, we're not quite sure how to think about this...

**SUPER
AWESOME**

B B C

Home News Sport Business Innovation Culture Arts Travel Earth Video Live

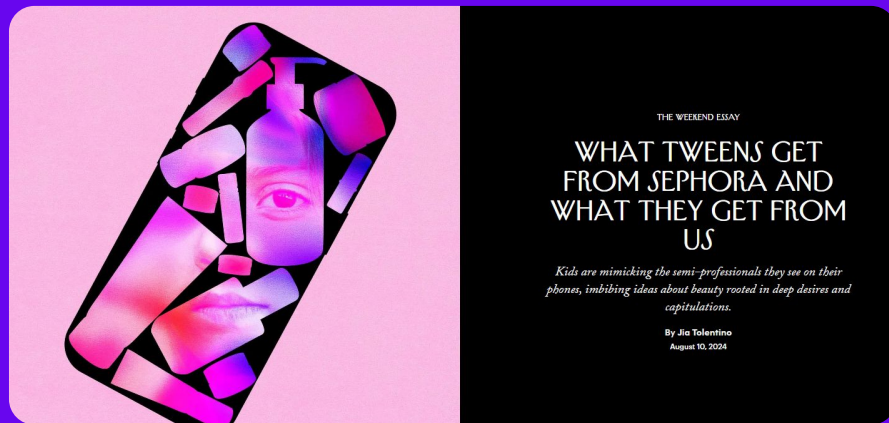
'Sephora kids' and the booming business of beauty products for children

22 January 2024

Share  Save 

Mia Taylor



Features correspondent



The 'Sephora kid' trend shows tweens are psyched about skincare. But their overzealous approach is raising concerns

By Paritja Kavilanz, CNN

6 minute read · Updated 8:48 AM EDT, Tue March 12, 2024



Chance to change the “playbook”?



Example behaviour:

**Kids take an IRL
behaviour online**



Things go off track...



**The industry starts to
build solutions**

PLAY

Kids start showing up in
games like Fortnite...

Epic fined over \$0.5bn by the
FTC ([link](#))

The LEGO Group and Epic Games Team Up to Build a
Place for Kids to Play in the Metaverse

ADVERTISING

Kids publishers need to
monetise through advertising

“Viacom, Hasbro and others
fined for ad tracking” ([link](#))

WPP and SuperAwesome announce global
partnership to ensure privacy and safety for
kids and families within online advertising

SOCIAL

U13s become regular users of
social networking

“Social media giants face
hefty fines.. under proposed
privacy measures for kids”
([link](#))

***Instagram, Facing Pressure Over Child
Safety Online, Unveils Sweeping
Changes***

(Still very early days for ‘solutions’)

1. Tech, regulation and the “Avatar Generation”
2. Attention fragmentation and the end of “kids TV”
3. “Dismissed as toys” – Gen Alpha and the future of social
4. Shoppers and makers
5. Gen A(I) and the next generation of products

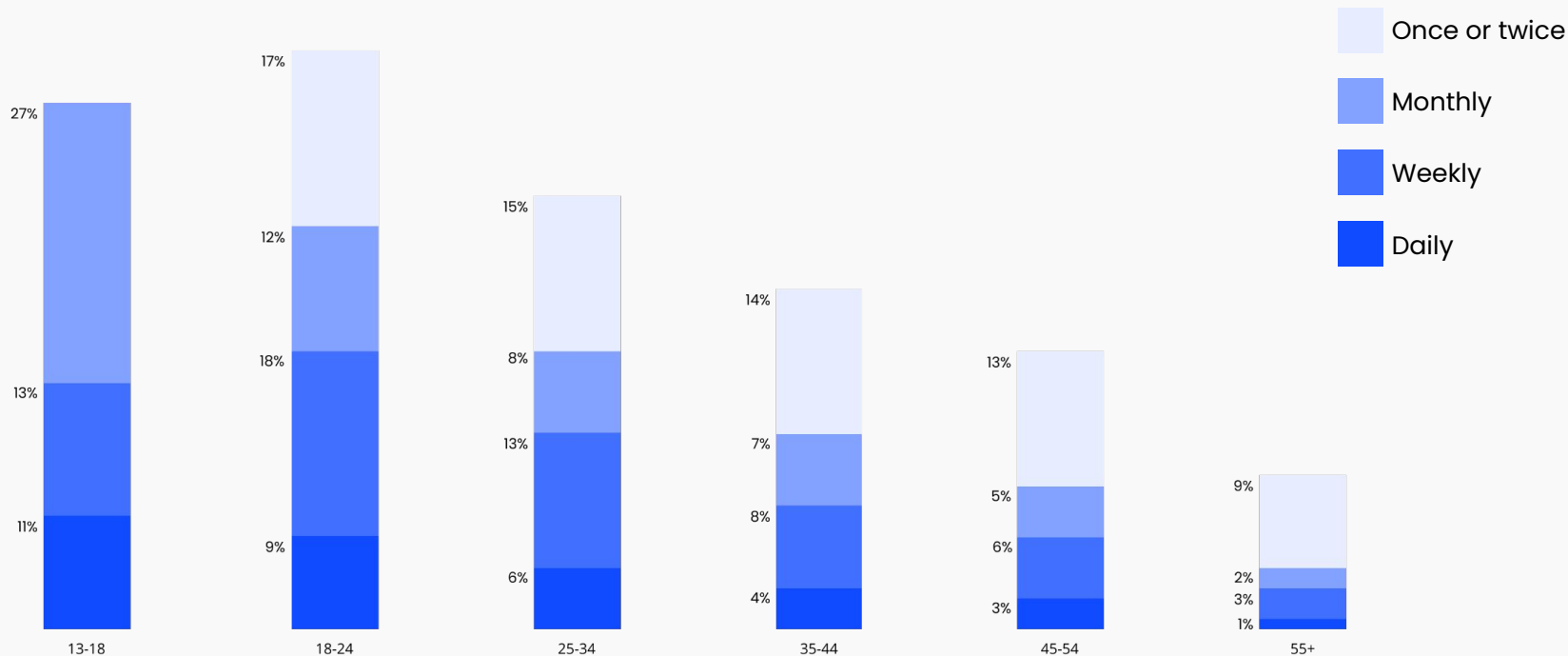
**New products break through when there's a
paradigm shift in technology, or big changes in
consumer attitudes**

Gen Alpha are experiencing both.
**What might that tell us about the products that
will win in the next 10 years?**

Start with AI: Gen A/Z are early adopters



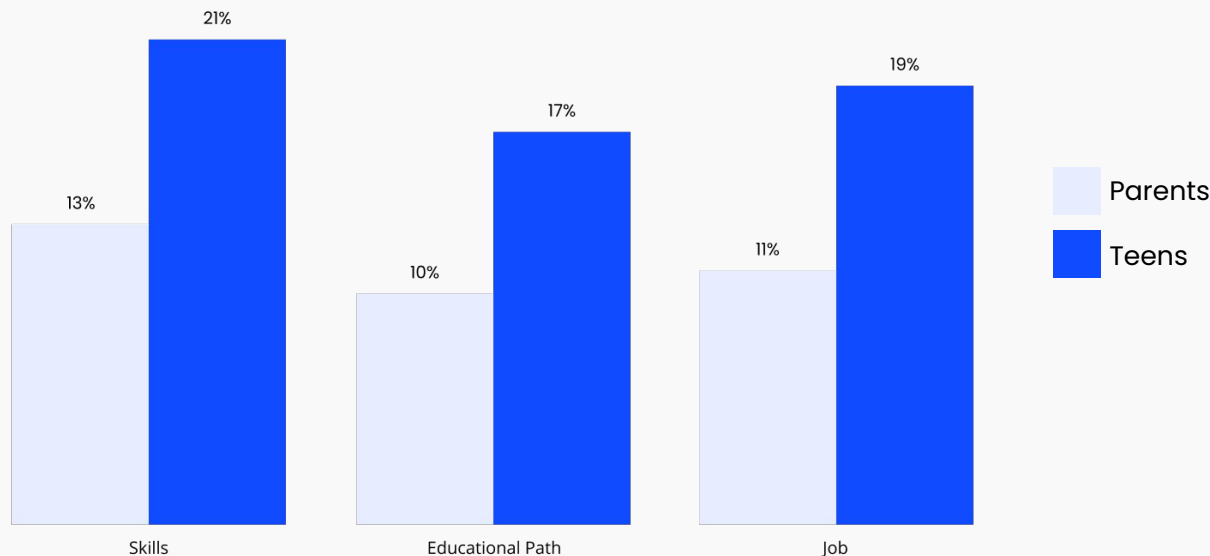
Gen AI Chat adoption by age



Still early – but teens are roughly twice as likely as parents to expect AI to change their future



% of teens and parents expecting Gen AI to change their future plans, by type of plan



Product market fit



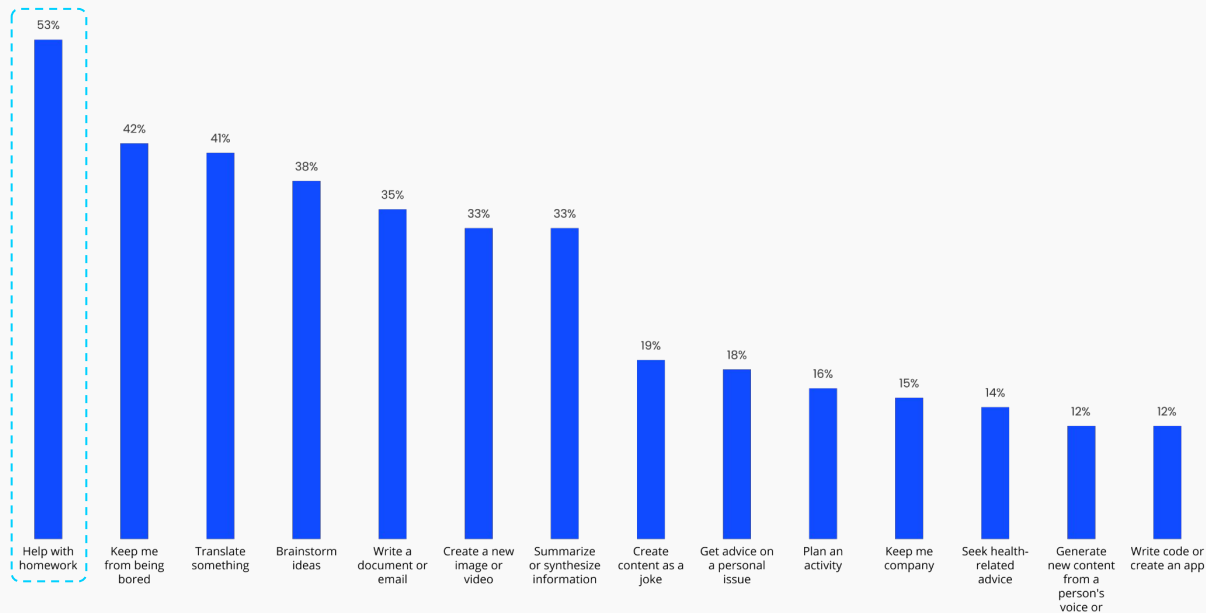
While analysts might wonder about Gen A use cases...

"We've had ChatGPT for 18 months, but what's it for? What are the use-cases? Why isn't it useful for everyone, right now?"

[Benedict Evans](#), April 2024

...for teens the answer is emphatically "Homework!"

Among teens who use gen AI, the percentage who have ever used it to assist them in the following ways...

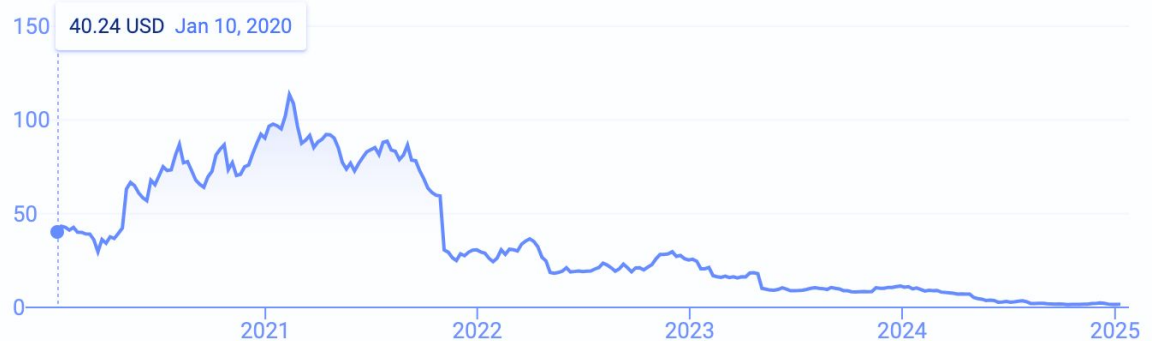


“The speed and scale of Google’s AIO rollout, and student adoption of generative AI products, have negatively impacted our industry and our business”

Nathan Schulz, CEO, [Chegg](#)

For a while, Chegg.com was the go to place for sample essays to help you ~~cheat on~~ be inspired for your homework. Then generative AI showed up....

Chegg share price, \$



Open	1.63	Mkt cap	180.45M	52-wk high	11.25
High	1.76	P/E ratio	-	52-wk low	1.34
Low	1.58	Div yield	-		

Over-indexing on social & content creation

Category	Total Teens	Total Parents	Teen/Parents	
Help with homework	53%	n/a		
Learn a new skill	n/a	22%		
Keep me from being bored	42%	n/a		Social
Translate something from one language to another	41%	39%	1.1	
Brainstorm ideas	38%	27%	1.4	
Write a document or email	35%	37%	0.9	
Create a new image or video	33%	24%	1.4	Content
Summarize or synthesize information	33%	30%	1.1	
Create content as a joke or to tease another person	19%	10%	1.9	Content
Get advice on a personal issue	18%	17%	1.1	
Plan an activity	16%	19%	0.8	
Keep me company	15%	7%	2.1	Social
Seek health-related advice	14%	20%	0.7	
Generate new content from a person's voice or image	12%	11%	1.1	
Write code or create an app	12%	12%	1.0	



Among teens and parents who use gen AI, the percentage who have ever used it to assist them in the following ways...

“No one will ever...”

**“Watch movies
on their phone”**

NETFLIX

“Buy a car online”



**“Meet their
partner on the
internet”**



**“Have friends
who aren't real...”**

character.ai

Making AI safer for the next generation – lots to think about...

Content

“Hey Chat, I think I might be transgender...”

How do we want this answered? How does that change for a 9 year old, a 13 year old and a 17 year old? When do we want AI to bring in trusted adults... and how does that fit with privacy requirements?

Bias

“Hey Chat, should we pass laws banning guns”

The right answer to some questions looks very different for different groups. How do we keep bias out of training data - and for some questions, what does bias even mean?

Safety

“Hey Chat, are you real...?”

How do we tell the difference between a chatbot and a real person - and when is each preferable? What’s in the “best interests” of a kid whose best friend is an AI agent? Does a kid understand AI’s limitations?

Privacy

“Is my personal data in your training set...?”

If a kid posts PI, are we sure it won’t make its way into model output? And if you tell your AI friend where you live - what happens to that data?

Generative AI could spark an explosion in Gen Alpha content creation

Default creator generation

Think of the “creator elite” already making \$1000+ a year

And unlike previous generations, Gen Alpha can sell to their peers

No gatekeepers

Increasingly the platforms for attention (YouTube, TikTok, Twitch) and consumption (Roblox, Fortnite, social commerce) are open (so long as you’re 13+)

Gen Alpha don’t need to ask anyone’s permission to create

Engagement being shaken up

VR, AR and the internet of presence offer the chance for Gen A to win in new mediums

Creativity at a premium

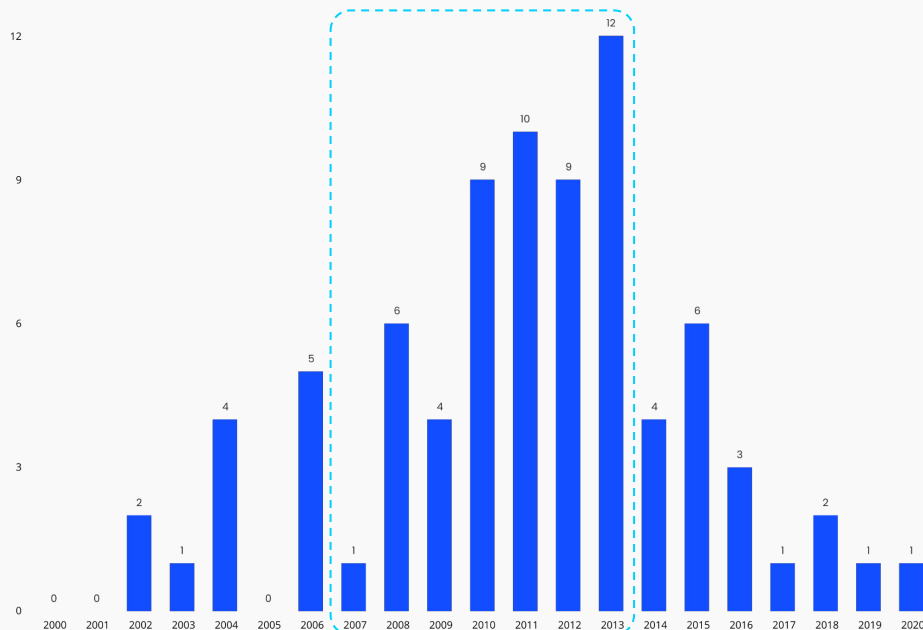
Gen AI makes it imaginable for one person to master both complex content creation and running a business back end

“In my little groupchat with my tech CEO friends there’s this betting pool for the first year that there is a one-person billion dollar company”

Sam Altman

That founder will likely be from Gen Alpha

Year of founding of companies started by the world's 100 youngest self made billionaires



Explosion of mobile resulted in a surge of new unicorns being founded - with the peak six years after the iPhone launched

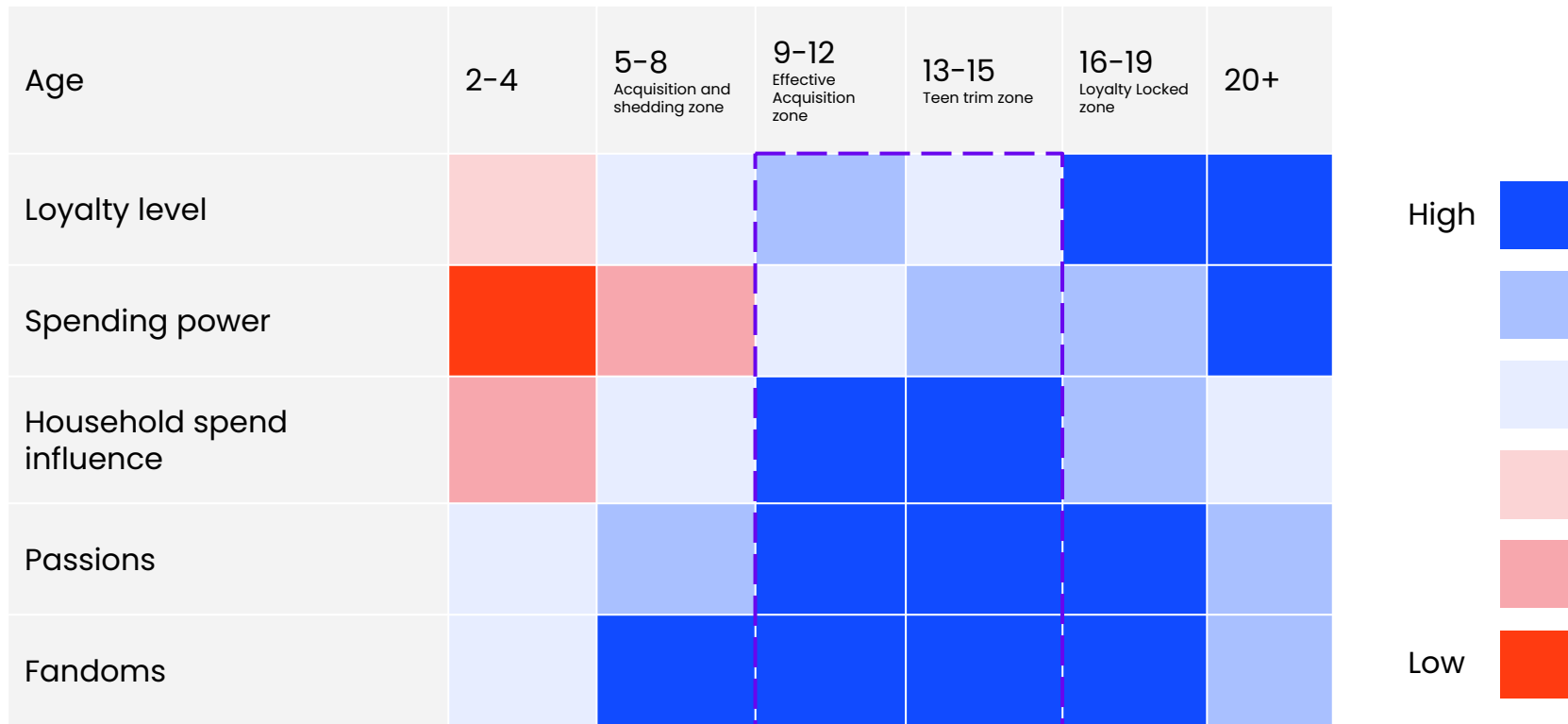
Six years after the launch of ChatGPT will be 2029 - when Gen A will be turning 18

Companies founded in the 6 years after the iPhone launch. 2013 launches include:



What tools is that founder falling in love with right now?

**SUPER
AWESOME**



Takeaways



1.

Fragmented fandoms

Gen A's attention is more fragmented than ever, and so are the communities of shared interest that define them. Brands need to re-tool their digital engagement strategies for a world which is more fragmented, community-owned and memetic than ever before.

2.

The Semi-social stack

Relative to previous cohorts, Gen A are over-indexing on social platforms which are anonymous, game-first, 3D (and sometimes VR). Brands need to design community and creator strategies for a new social paradigm.

3.

An Explosion of Gen A(I) Creativity

Gen AI will see us reinvent digital engagement at least as profoundly as the shift to mobile, and will further accelerate the shift towards creator-media. Get ready for a world in which Gen AI propels Gen A to take their place hyper content creators in their own right.



SuperAwesome helps brands responsibly and meaningfully engage youth audiences across their digital universes



Awesome Intelligence

The world's first youth-audience and data recommendation platform.

Enabling brands to understand their under-18 audiences' interests and motivations in order to effectively connect with them where they are.



AwesomeAds

Engage youth audiences at scale with **+155B available monthly impressions** across mobile, web, in-game, CTV, YouTube and YouTube Shorts.

AwesomeAds provides creative services, measurement, and optimization using safe data gleaned from every platform kids & teens are in.



Gaming

We empower brands to deliver safe, exciting, and insights-driven gaming programs, whether it's custom integrations, skins, UGC or other in-game opportunities.



Creators

Deliver high-engagement creator content with fully managed talent partnerships.



Authors:

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