

MARKETING THAT APPEALS TO UNDER 18S

**Prepared for the Portman Group and the Independent
Complaints Panel by Kids Industries**

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23.05.2023

INTRODUCTION

The Portman Group is a social responsibility body and regulator for alcohol packaging, promotion and sponsorship in the UK.

Part of The Portman Group's area of focus – as detailed in the Code of Practice on the Naming, Packaging and Promotion of Alcoholic Drinks – is to ensure alcohol is promoted in a socially responsible way that does not particularly appeal to under-18s. An Independent Complaints Panel rules on complaints brought, in which brands contravene the code; many of these complaints relate to the protection of under-18s.

Kids Industries, a specialist research and marketing agency focused on the children's and family market, was invited by the Portman Group and the Independent Complaints Panel to provide insights on marketing techniques that are used to appeal to children and teenagers outside of the alcohol industry. This was to assist both organisations with the application of Code rule 3.2(h).

This training was undertaken on the 11th May 2023 and the following report was prepared as an accompaniment.

The document is divided into four sections:

1. **Child Development:** a topline overview of key developmental stages which shape how marketers create appealing products, services and campaigns for a young audience
2. **Trends in Kids Marketing:** three key trends Kids Industries considers to be important when thinking about how to attract children and young people
3. **Appealing to Kids:** the aesthetic elements of packaging which appeal to children, with reference to examples from FMCG brands targeted at children
4. **Considerations:** a summary of the things the Independent Complaints Panel could consider when determining whether an alcohol product is in breach of The Codes

1. CHILD DEVELOPMENT

Kids Industries uses a model called Ages and Stages, which allows us to consider the needs of children at different developmental stages when we create for them – be it a product, service or advertising campaign. This model is based on the work of Piaget et al.

Crammed into the age range 0–18 are three broad developmental shifts and 9 further developmental stages which are illustrated in Figure 1.

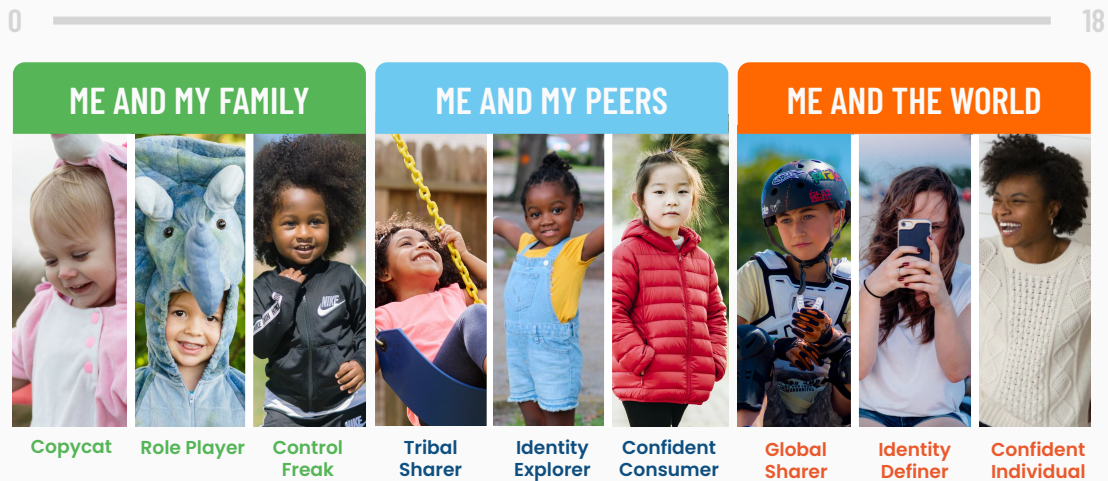


Figure 1: Ages and Stages Model

Every child develops at their own pace and when children reach each stage differs from child to child.

The three broad shifts are...

1. **Me and my family:** to start with it's all me, me, me – my reality, my family
2. **Me and my peers:** then it's about where do I fit in? Cultivating alliances in the playground, and deciding whether you're a fan of Pokémon or Star Wars
3. **Me and the world:** finally, this broadens out and it's about showing your personality to the world, often through social media – it's about sharing passions and a quest for likes

1. CHILD DEVELOPMENT

These developmental stages impact the sorts of entertainment brands and characters that children engage with (see Figure 2).

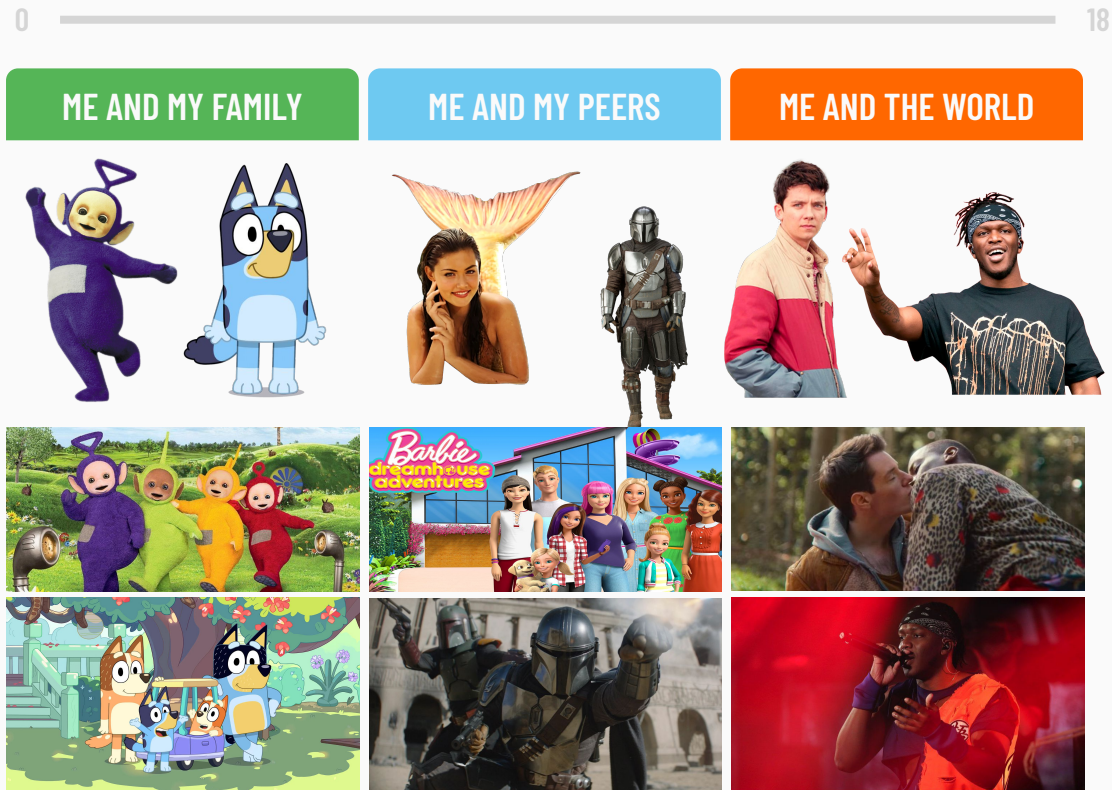


Figure 2: How content preference is shaped by developmental stage

Me and My Family

Children's content for under 7s is strongly focused on animation (though live action influencer created content on YouTube increasingly features). Parents and children alike have a strong need for safety from the content consumed and the characters viewed¹.

The TV shows **Teletubbies** and **Bluey** nicely illustrate what you need to produce to engage this audience.

The well established entertainment brand: Teletubbies, is currently having a resurgence. Taking place in a floral landscape populated by animals – its safe, psychedelic environment is aimed at attracting the attention of toddlers.

Bluey is an extremely successful animated show about a family of cartoon dogs who live in Australia: a mum named Chilli; the dad, Bandit; and their two daughters, Bingo and Bluey, roughly aged 4 and 6.

At the heart of the show is the magic and humour of play which is central to 3–7s. The domestic focus of the programme delivers on the feeling of safety parents and children crave, and the well-observed reality of family life connects with children and parents in equal measure.

¹ What Kids Buy, The Psychology of Marketing to Kids, Dan S. Acuff, 1999

1. CHILD DEVELOPMENT

Me and My Peers

Pre-teen or 'tween' children are particularly impressionable at this stage – attuned to peer opinions and preoccupied with building friendships. Post 6–7 there is an eschewing of things considered 'babyish'.

Childish fantasies in content are replaced by more 'realistic' fantasies which feature at least somewhat plausible possibilities e.g. Star Wars and Jurassic Park².

H2O: Just Add Water is also a good example of this. An Australian fantasy drama, it revolves around three teenage girls facing everyday teen problems – the twist being they are mermaids with powers over water. The focus on relationships shows the preoccupation of this developmental shift with friendships.

The Mandalorian, a Disney+ TV show in the Star Wars franchise, is also popular with this shift. The show follows a bounty hunter in his action packed escapades across space. It is live action, demonstrating the shift in this age group beyond animation, and toward character complexity, exemplified by the struggle between good and evil.

Me and The World

Early adolescence brings with it significant changes. Puberty and its biochemical and hormonal changes impact in a myriad of ways. Not least the capability for abstract thinking which amongst many other things alters humour and creativity, providing access to new and previously unexplored territory. Young people are able to challenge established belief systems and understand the subtleties of innuendo, sarcasm and irony³.

Early adolescence is a key period of identity formation which often results in a distancing of authority figures such as parents. Looking good, power, self-esteem, dating, and social acceptance are critical to the early adolescent. It's also a period of experimentation, from sexual identity to musical taste.

The types of content that resonate often explore themes of sexuality and romantic relationships.

Sex Education is a prime example of a TV show which connects with teenagers specifically because it focuses on issues of identity, friendship and sexuality but in a very funny and irreverent way.

YouTube has long been a place where teenagers have been able to find their tribe and connect with the world. **KSI** – a famous YouTuber, registered his first YouTube account in 2009 and built a following posting gaming commentary videos – he later diversified into vlog and comedy videos and has become a successful music artist.

² What Kids Buy, The Psychology of Marketing to Kids, Dan S. Acuff, 1999

³ What Kids Buy, The Psychology of Marketing to Kids, Dan S. Acuff, 1999

2. TRENDS IN KIDS MARKETING

There are three trends affecting kids marketing now which Kids Industries feel are particularly important when considering how to market to children. These are by no means exhaustive but we feel they are important contextual factors worthy of mention.

Control

Influence changes as a child ages. As you can see here (Figure 3) with the blue line, parents have almost complete control over children’s access to and interaction with brands in the first few years of life.

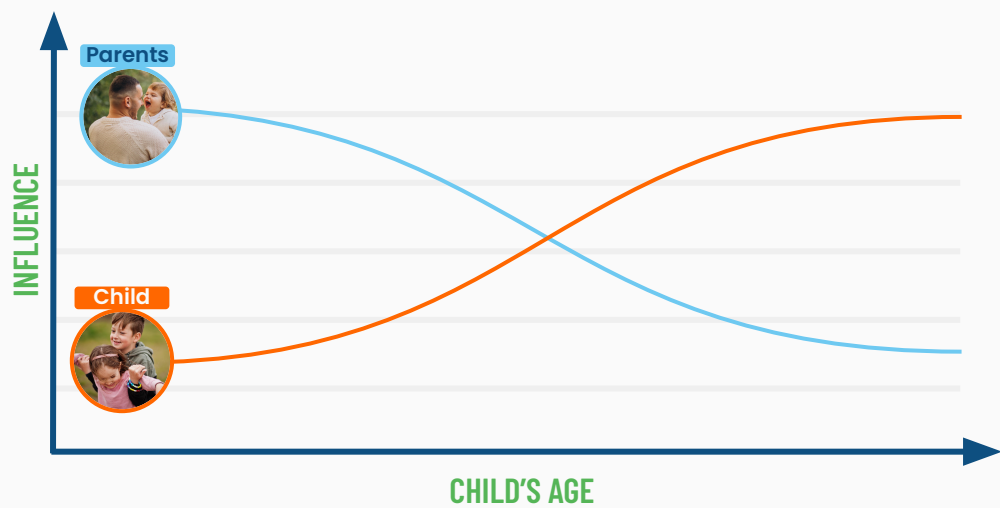


Figure 3: Increased information access mean control is shifting

As the orange line shows, a child’s influence grows over time as the parent’s impact on decision making diminishes. Where the lines cross is roughly the age of 7. The growing control of the child culminates in the teenage years.

Whilst it’s evident that parents have a role in children’s decision making, the role of parents in decision making is changing across the world; it’s diminishing sooner.

The ability of parents to monitor and influence the types of content their children engage with is reducing – kids have an independence through personal devices and intuitive digital platforms. ‘Helicopter parenting’ has been replaced by a more collaborative parent/child relationship in which there is greater trust.

The media habits of 4–6 year olds illustrate this strongly. As Figure 4 shows kids have significant access to digital devices which means brands can reach them directly sooner. The Kids Industries’ Global Family survey found 88% of 4–6s have access to a tablet in the UK, 51% a smartphone and 60% have access to a smart speaker⁴.

In addition to this they are using services that aren’t designed for them and that give them access to loads of content. 56% of 4–6s use YouTube and, concerningly, 9% use TikTok⁵. All of this means that children are choosing more content sooner; 84% of 4–6s choose half or more of the online video content they view and 79% choose half or more of their TV and streaming video content.

DEVICE ACCESS AND OWNERSHIP		CONTENT DECISIONS	
88%	have access to or own a tablet	84%	choose half or more of their online video content
51%	have access to or own a smartphone	79%	choose half or more of their TV and streaming video content
60%	have access to or own a smart speaker	75%	choose half or more of their audio content

Figure 4: Device and Content Access amongst 4–6 year olds

⁴ The Kids Industries Global Family Survey, 2022
⁵ The Kids Industries Global Family Survey, 2022



2. TRENDS IN KIDS MARKETING

Influencers

Children’s spheres of influence have expanded (Figure 5). Previously, parents, siblings and friends would prompt discovery and engagement with different brands. But now online influencers (e.g. YouTubers) play a huge role and are challenging these traditional spheres of influence, reaching families and children younger and younger. These figures are viewed like friends, build incredible loyalty and achieve global reach. Mr Beast is an apt illustration of this – a famous YouTuber, the launch of his burger restaurant attracted 10,000 people.

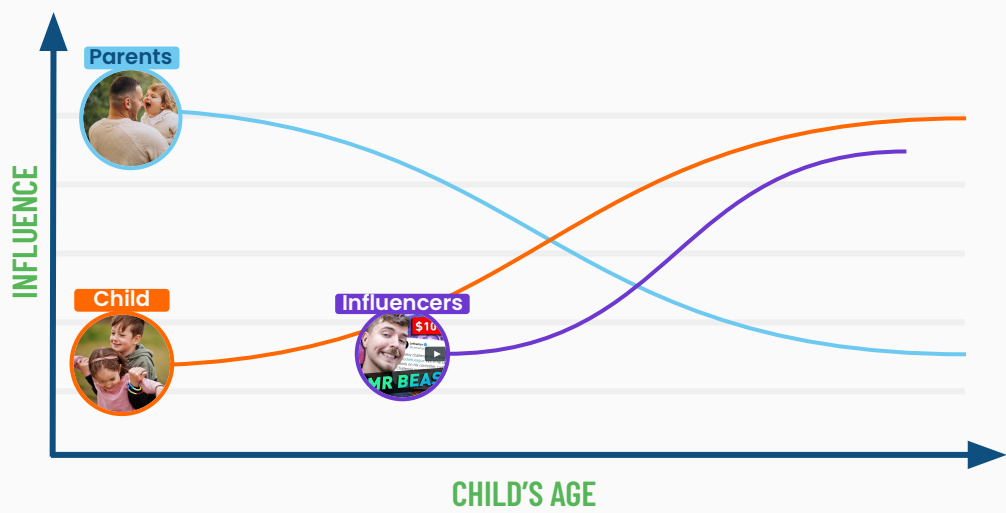
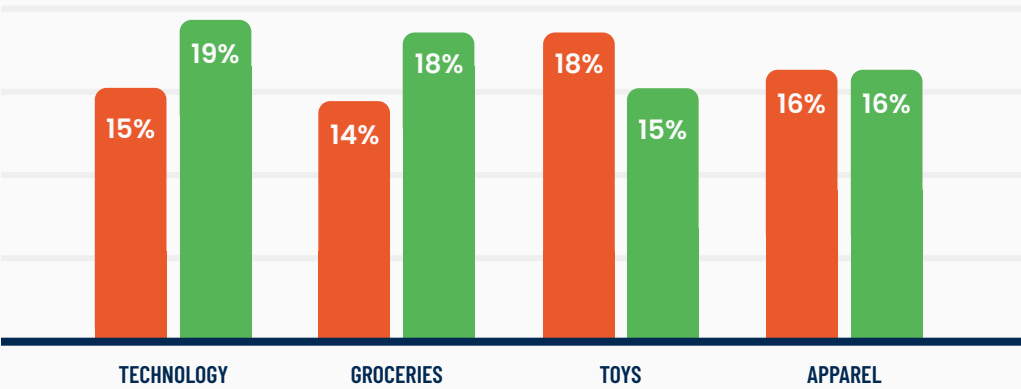


Figure 5: Children's Influences

The Kids Industries global survey found that influencers are beginning to rival friends and family as trusted sources of information. As Figure 6 shows, influencers now have considerable influence over product purchases from technology and groceries to toys and apparel.

INFLUENCERS NOW RIVAL FRIENDS AND FAMILY IN DECISION MAKING



Source: Kids Industries Global Family Survey
B8 "Thinking about products you have bought for your family / child in the last 12 months, (i.e. things you buy for the kids, not just for you or your partner as an adult), what has influenced the purchase of the following types of products?"
"Seeing influencer recommend it in a post or video" vs "Hearing about it from friends or relatives"
Base n = 500 (UK, families with children aged 4-13yrs)

Figure 6: Role of Influencers in product purchases



2. TRENDS IN KIDS MARKETING

Gaming

Gaming has become an increasingly popular activity – kids between 4 and 13 spend just under a sixth of their non school time gaming and it is equally popular with girls and boys⁶. Platforms and games like Roblox, Minecraft and Fortnite are extremely popular.

Online games are playing a growing role in brand discovery and frequently feature advertising and branded experiences. Whilst platforms like YouTube still have a key role to play in brand discovery for kids, gaming platforms are rising in prominence (Figure 7).



Figure 7: Driving Brand Discovery

Roblox in particular is popular with under 13s – it’s an example of a nascent metaverse experience: a virtual-reality space in which users can interact with a computer-generated environment and other users. Roblox isn’t a single game, it’s a gaming platform comprising millions of digital experiences to suit everyone’s tastes.

Roblox has its own distinct aesthetic. To the uninitiated, it can resemble the digital equivalent of a Duplo set; with blocky figures and roughly hewn pixelated worlds colliding in a chaotic mix of primary colour. For Millennials who have grown up with the polished graphics of console games, this seemingly more basic digital offering can seem very foreign but it’s deeply appealing to kids.

6 The Kids Industries Global Family Survey, 2022



3. APPEALING TO KIDS

The wide range of developmental stages that the age range 0-18 encompasses means children with them have very different expectations from products and packaging.

By way of example – if you consider headphones (Figure 8) targeting different ages and stages there are clear differences. At the younger end – the focus is on bright colours, customisation / personalisation and animal-like features e.g. unicorn horns etc.

As children develop, the propensity for brighter colours remains but there is more of a desire to fit in and a move away from what might be perceived as ‘babyish’ product features.

When children get into their mid-late teens they are as likely to favour ‘adult’ brands e.g. AirPods and more muted tones and aesthetics.

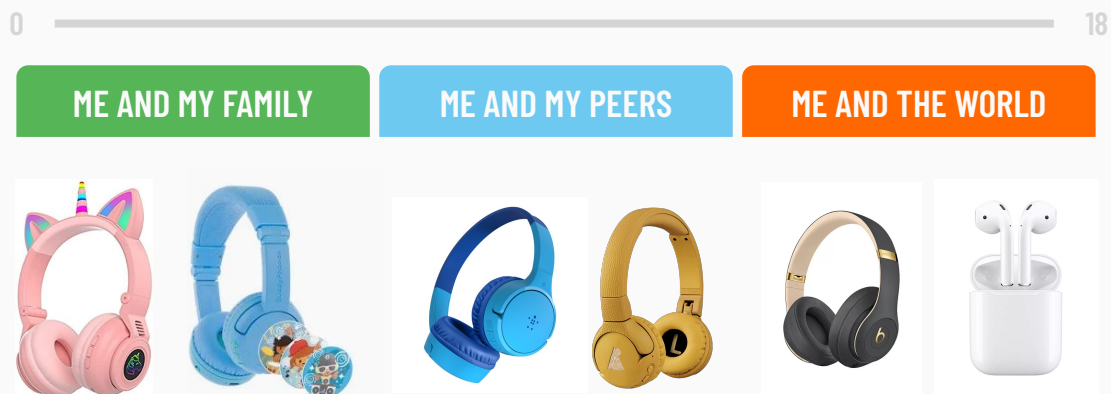


Figure 8: Headphones appealing to different age groups

Consistencies in packaging aimed at children

The majority of cases considered by the Independent Complaints Panel tend to be focused on packaging and so it is instructive to use FMCG packaging aimed at children as a starting point to discuss what attracts children. The packaging featured in Figure 9 is primarily aimed at under 7s and their parents.

The Code rule makes reference to packaging and promotions not having ‘particular’ appeal to under-18s. It is the opinion of Kids Industries that the decision about what constitutes ‘particular’ appeal should be made by looking at packaging as a whole and its various visual elements.



Figure 9: FMCG packaging aimed at children

3. APPEALING TO KIDS

Character

Characters and brand mascots play a significant role in attracting children to products.



Figure 10: Characters that appeal to under 7s

The characters in Figure 10 are geared to under 7s and demonstrate certain visual consistencies:

- **Cartoon-like:** children under 7 tend to favour animation / cartoons as opposed to live action and so all of the characters are cartoon-like
- **Animal or anthropomorphised:** children love animals so they feature heavily as do anthropomorphised foods
- **Exaggerated:** many of these characters seem excessively exaggerated to adults with oversized features (eyes, smiles, cheeks) and contorted expressions but the perceptual filter a child looks through is different – they are still developing so this exaggeration is appealing
- **Safe and approachable:** you'll note there are no corners or jagged teeth – children and parents alike are looking for safety and security. Also it's marked that all of the cartoon characters have very open and welcoming stances with arms wide open – encouraging the nurturing instinct in the child
- **Funny:** children under 7 aren't capable of sophisticated humour and so many of the characters are silly e.g. Frubes, to tap into this

The licensing industry is worth \$315+ billion globally and a significant proportion of that is items aimed at children and families⁷.

Entertainment characters are frequently used as a means of attracting children and parents to certain products – from Peppa Pig raisins to Minions drinks.

⁷ Licensing International, 2023

3. APPEALING TO KIDS

Colour & clarity

Young children – under the age of 7 – pay little attention to verbal messages, it's the visuals that matter. This is why Monster Munch's packaging is highly visually stimulating and a more adult brand like Kettle chips is much more paired down visually (Figure 11).



Figure 11: 'Child' vs. 'adult' packaging

Because of brain development someone under 7 is likely to fixate on one particular aspect of the visual as opposed to exploring the entire visual field – so in the case of Monster Munch that would be the unusual brightly coloured character at the centre of the packaging which pulls attention.

The keyline (or outline) on the character is also important for children to distinguish the object as they develop their visual perception skills. The thicker the keyline – the easier it is for a child to notice.

Young children tend to be most attracted to bright primary colours e.g. yellow, red, blue. This is a result of a number of factors:

The characters in Figure 10 are geared to under 7s and demonstrate certain visual consistencies:

- **Their cognitive development** – bright colours are particularly stimulating to their developing brains and easier to perceive
- **Emotional response** – bright colours evoke joy and feelings of happiness.
- **Limited attention span** – bright colours can attract their attention and keep them focused

That said, young children do also have an affinity for secondary colours like green, purple, pink and orange

More muted colours e.g. pastels, black, brown and grey are far less appealing to young children. As children grow older their cognitive abilities develop and so they develop a more nuanced approach to colour.

There are certain colours which children are programmed to react to. Sadly if you look at any toy aisle the differentiation between toys aimed at boys (tending to use blue) and those aimed at girls (tending to employ pink) can be stark. This artificial separation means that boys are more likely to gravitate towards blue and girls towards pink.

3. APPEALING TO KIDS

Creating great visuals for children in any media on any platform is not just about choosing bright colours though. If you look at **Figure 12** below, you'd think that Image 2 wouldn't attract the interest of a child because of the more muted colour palette compared to Image 1. However, the contrast in the luminance is higher than image 1 and this is apparent when you grayscale them. This contrast means children will pay attention to the image readily.

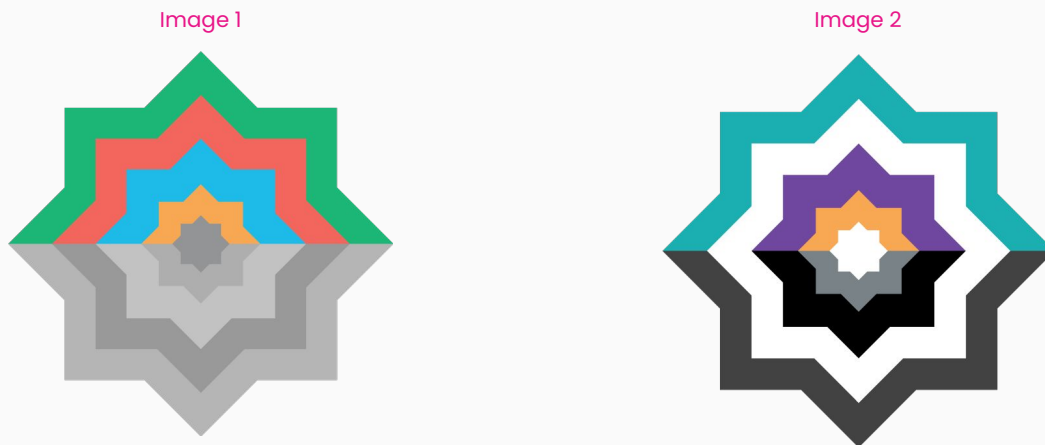


Figure 12 (Image 1; Image 2): Contrast

Name & Logo

Brand logos aimed at younger children tend to apply the following principles:



Figure 13: logos aimed at children

- Simplicity / brevity
- Play and fun e.g. onomatopoeic
- Bright primary text
- Chunky / cartoon-like font
- High contrast or thick outline

Collectability

Collectables are perennially popular with kids from trading card games (Pokémon) to football sticker sets and toys / dolls like Barbie and Hatchimals. Collecting is often used as a means of attracting children to buy certain food and beverage products.

Collecting changes as a child develops – between the age of 3 and 7 it's more about collation (more is more), but as a child gets older they become more discerning about what they collect. The child becomes focused on curation (quality over quantity) – ordering their collections and viewing them as a means of social connection.

YoYo Bear – the fruit based snack – leveraged children's desire to collect by including a collectable card in each of their packs. These became a big hit – such was the demand people were selling the cards on Ebay.

3. APPEALING TO KIDS

Flavour

Children have a genetic predisposition towards sugary / sweet and salty foods and flavours. They initially reject sour and bitter tastes. Similarly children favour fruit and candy-like odours.

Part of the recent consternation around the potential appeal of vapes to children is driven by the sickly sweet, fruity flavourings advertised on social media from pink lemonade to banana and mango.

Kids experience shifts in flavour as they grow:

- Kids under seven tend to like flavours that are natural, simple, and easy to understand. Classic flavours like vanilla, chocolate, and strawberry, and flavour combinations like peach blueberry tend to work well.
- Kids between eight and twelve prefer more exciting tastes. "Fantasy" flavours like superman ice cream or unique flavour combinations are popular in gum, beverages, and yoghurt.
- Teenagers prefer more adult flavours like coffee or chocolate. Chocolate flavours designed for younger kids tend to have more dairy notes, while chocolate for teenagers can include nuances like mocha or cappuccino and deeper, darker chocolates. Teenagers also like extremes like extra caffeine, spicy, or sour⁸.

⁸ Products that resemble foods and appeal to children – European Commission Putting vapes in plain packaging 'reduces their appeal to children', The Independent
Flavours for Children: Crafting Products that Appeal to Kids & Parents, FlavorSum

4. CONSIDERATIONS

Below Kids Industries has provided a summary of things that the Panel might consider when making their evaluations of what constitutes particular appeal to children:

Colour & clarity Is the colour of the beverage or packaging particularly bright e.g. a primary colour or bright secondary colour? Is the outline on aspects of the packaging particularly pronounced?	Character Are they using an animal or anthropomorphised product character? Is the character cartoon-like, exaggerated, safe and approachable or funny?	Name & logo Is the name simple, playful, onomatopoeic? Is the logo in a bright colour, chunky cartoon-like font or does it feature high contrast or a thick outline?
Collectability Does their packaging incorporate a collectable element which might engage children?	Licensing Are they partnering with a brand, character, personality or platform that has particular influence over children e.g. an entertainment character, influencer or gaming platform?	Flavour Is the flavour or odour of the beverage particularly sweet e.g. berry or chocolate flavoured?