Coalition for Innovative Media Measurement

When Metrics Fall Short:

The Case for Children's Media Measurement

July 2026

About CIMM

The Coalition for Innovative Media Measurement (CIMM) is a nonpartisan, pan-industry coalition of companies focused on cultivating and supporting improvements, best practices, and innovations in measurement and currency; data collaboration and enablement; and the use of new metrics and approaches to understanding the value of media. CIMM embraces the entire media and advertising ecosystem and prioritizes effective collaboration to deliver meaningful change.

About the Author

Emily Horgan is an independent media consultant and former Disney executive. She currently works across several international clients focusing on strategic development of kids' IP, distribution landscape analysis, brand marketing, franchise management, and digital anti-piracy intelligence.

She has undertaken extensive research and published analysis on the Netflix kids' strategy, including launching the Netflix Kids Content Performance Report which has clients from major streamers, toy companies, licensees, producers and distributors. She also has significant first-hand experience in SVOD and YouTube from her time at Disney.

Alongside her consulting work, Emily writes a Substack newsletter, *The Kids Streamer Sphere*, as well as serving as co-host on the Kids Media Club Podcast.

Foreword

Over the past decade, the children's media landscape has undergone a fundamental transformation. Where once young audiences gathered around television sets for appointment viewing of dedicated children's programming blocks, today's children consume content across a diverse, fragmented, and constantly shifting range of platforms, devices, and formats. YouTube creators are watched on television screens, animated series are streamed on phones, and gaming content is consumed interactively on tablets. What was once a relatively linear ecosystem has evolved into a fragmented, multi-platform digital marketplace, where video, games, social media, and interactive formats overlap and compete for attention.

While these shifts have opened new commercial opportunities and dramatically lowered barriers to entry for producers, they have also made children's media measurement significantly more complex. In an earlier era, there was confidence that measurement solutions could provide a comprehensive portrait of children's TV viewing through television panels and broadcaster data. Today, children's consumption spans linear channels, subscription streaming services, advertising-supported streaming, social video aggregators such as YouTube and TikTok, mobile apps, gaming platforms, and more. Each environment comes with different measurement methodologies, different data access restrictions, and varying levels of transparency. Measurement quality varies significantly across platforms, with substantial gaps in transparency.

These measurement challenges have far-reaching implications for children's media companies, advertisers and audiences — and carry broader cultural and policy implications. Age-appropriate content produced specifically for children can help to build literacy, empathy, and problem-solving skills and strengthens identity, inclusion, and shared democratic values. Moreover, the provision of content funded publicly or made available on ad-supported platforms ensures that all families, regardless of income, can have access to high-quality children's media. All of this requires robust, privacy-compliant measurement solutions.

This paper, commissioned by The Coalition for Innovative Media Measurement (CIMM), sets out to explore these issues. It has been developed through a truly collaborative process, synthesizing insights from across the children's marketplace, from major studios, specialist kids content businesses, streaming platforms, measurement providers, and policy experts to assess the current state of children's media measurement and to chart a path toward more effective solutions. In the course of our research, we spoke to over 30 industry professionals closely involved in programming and measurement of children's media, and benefited from a robust executive roundtable debate CIMM organized about the topic in April 2025.

The goal of this paper is to catalyze a positive, productive debate and to stimulate concrete actions that can support the children's media marketplace with measurement solutions that protect children's privacy while enabling the data-driven insights necessary to sustain a vibrant, diverse, and high-quality children's media ecosystem.

We're grateful to Emily Horgan for helping to facilitate the process and for providing her insights and expertise.

CONTENTS

Executive Summary

This paper makes a simple argument: Children's media consumption has shifted decisively into fragmented, platform-driven digital environments — but the measurement infrastructure has not kept pace. The result is a growing gap between where children spend time and where the industry has visibility. This measurement gap is now constraining investment, distorting incentives, and weakening the long-term sustainability of the children's media ecosystem. It represents a structural market misalignment with material economic consequences.

Children's media engagement has changed fundamentally during the last decade. Linear television's scheduled programming has given way to a large digital ecosystem in which young viewers navigate streaming services, YouTube channels, social video platforms, gaming environments, and mobile applications. While this evolution has expanded participation among creators, expanded content choices and stimulated content and advertising innovation, it has also created a fragmented landscape. Advertisers, content owners, and regulators now face a significant challenge — the traditional metrics and measurement systems that once provided insights into children's viewing habits no longer capture a comprehensive picture of their media consumption.

Measurement systems designed for the broadcast era are misaligned with today's fragmented digital ecosystem. Tools built for linear schedules and shared screens face structural constraints that make it hard to capture cross-platform, multi-device, long-tail consumption patterns, spanning TV, video and gaming. The result is a marketplace in which aggregate consumption continues to expand while standardized cross-platform visibility has deteriorated.

This matters. Measurement underpins commercial viability across the children's media ecosystem.

A Fast-Changing Market

There are approximately 73 million children in the U.S., representing just over one-fifth of the total population, distributed across five distinct developmental cohorts — babies, preschoolers, kids, tweens, and teens. Each group displays unique behaviors: co-viewing dominates early childhood, while gaming and short-form video define tween and teen usage.

Linear television, once dominant, now represents only a small minority of children's total video time. Premium streaming and YouTube together capture two-thirds of video viewing, with gaming commanding a separate, substantial share. The proliferation of digital distribution has expanded access for a long tail of creators serving specialized and developmentally distinct audiences.

As standardized visibility has diminished, CPM performance has weakened and capital allocation has become more risk-sensitive.

Why Children's Media Measurement Matters

Audience measurement functions as market infrastructure; when it becomes misaligned with consumption realities, capital allocation and creative investment deteriorate.

Measurement matters across three dimensions:

1. **Cultural and Public Service:** Measurement provides the evidence base for investment in quality, age-appropriate, diverse, and educational programming. Without improved industry-wide measurement, studios increasingly favor sequels, reboots, and legacy franchises over new IP, narrowing the creative pipeline. Content creators also face difficulty assessing whether they are adequately serving distinct audiences across platforms. In the absence of reliable cross-platform measurement, it becomes difficult to assess reach among underserved communities, diverse audiences, or educational segments.

2. **Commercial and Economic:** Children influence billions of dollars in household spend and represent long-term franchise value. Many brands are keen to invest in high-quality, brand-safe content that reliably meets the needs of families and children. For marketers and publishers, measurement is not merely a tool for optimization, it's the foundation of commercial viability. Advertisers and rights holders need reliable, privacy-compliant data to allocate budgets, greenlight investment in content, and assess ROI. In the current environment, advertising CPMs for children's content have declined, platform-based business models are challenging for many publishers and creators, and public service funding is shrinking. Distribution too has become dependent on complex ranking systems that can reward engagement metrics over educational or developmental value.

3. **Policy and Regulation:** Regulators depend on reliable industry measurement to understand market behavior and ensure compliance frameworks operate as intended. Where measurement gaps persist, enforcement becomes more difficult and market incentives become distorted. This dynamic creates a policy tension: restrictions that constrain measurement capabilities may inadvertently weaken enforcement mechanisms designed to protect children.

A Critical Need For Legal Clarity

Current measurement shortfalls are often attributed to COPPA restrictions; however, some industry stakeholders argue that statutory interpretation may be narrower than commonly assumed. COPPA restricts the tracking and behavioral profiling of children under 13, but does not prohibit household-level measurement or the identification of adult co-viewers. Some stakeholders contend that certain platform policy implementations may be more restrictive than statutory requirements strictly mandate. The 2019 FTC settlement targeted behavioral advertising directed at children, not the measurement of parents watching with them.

Children's media stakeholders are not seeking to track or behaviorally profile children. Rather, they are seeking clarity around the permissibility of privacy-compliant household-level and co-viewing measurement. Distinguishing between prohibited behavioral tracking and legitimate aggregate measurement is both legally important and commercially consequential.

Key Measurement Challenges

Given these dynamics, the industry faces five important measurement challenges:

1. Panels provide high-quality, consent-based data but lose statistical robustness under fragmentation. Sample sizes shrink to statistical irrelevance once divided by age cohort, platform, and content type, and co-viewing is poorly captured.
2. Big data sets — Smart TV ACR, set-top box data, and server logs — offer scale but rarely identify child viewers. Children are frequently absent from identity graphs due to limited device ownership, email usage, or individual account registration. If they're accounted for, indicators are reduced to binary presence/no presence by broad age bands.
3. Most video platforms provide limited visibility of children's viewing and media consumption, especially for children under the age of 13, resulting in data gaps across the ecosystem. Some industry stakeholders question whether current platform policies are more restrictive than strictly required by statutory mandate. While platforms understandably prioritize risk mitigation, there may be scope for clarification that distinguishes prohibited behavioral tracking from permissible household-level or co-viewing measurement.
4. A significant portion of children's media consumption now happens on gaming platforms, but these remain virtually unmeasured, especially for publishers looking for a joined-up view of consumption. No standardized program equivalence exists in the gaming market.
5. Economic incentives in ad tech often reward scale and reach rather than accuracy, compounding distortions across the supply chain. The accuracy of identity datasets on parental status is relatively low, with studies showing only 42% accuracy for identifying households with children.[1]

[1] Truthset, *Presence of Children Data Accuracy Analysis* (2025)

Executive Summary

Recommendations

This paper proposes that the industry explore three broad actions:

1. **Establish a Formal Cross-industry Children's Media Measurement Council or Taskforce:** This body would provide a coherent industry voice to shape policy discussions, pool expertise, and influence technical standards.
2. **Engage Major Platforms as Systemic Partners:** Advocate for structured stakeholder input into policy and monetization changes. Co-develop COPPA-compliant, privacy-preserving measurement solutions with independent vendors. Explore incentive structures and monetization models that align commercial performance with developmental and educational value.
3. **Assess the Potential for and Feasibility of Collaborative Measurement Initiatives that Could Support the Children's Media Ecosystem:** Effective measurement requires coordinated collaboration across platforms, publishers, advertisers, agencies, and independent vendors. The new Taskforce (or another industry body) should explore the scope for collaborative measurement initiatives that could support the children's media marketplace. For example, these initiatives could potentially include:

Establishing a Common Integrated Measurement Solution: Industry stakeholders could collaborate to fuse existing measurement tools and data sources into a single, hybrid framework. While imperfect, such an amalgamation could provide an interim, best-available cross-platform overview of children's media consumption — offering enough consistency and credibility for agencies, advertisers, and publishers to transact with greater confidence.

Building Support for Program-level Data Sharing: A recurring frustration is that many streaming services do not share program-level or content pass-back data. A practical step would be to secure greater transparency from premium streaming partners, ensuring that advertisers and agencies have visibility into where kids' ads are running. This would support both brand safety/suitability and more effective planning. The scheme could be constructed as a preferred partnership program, with strict safeguards and commitments.

Developing Bespoke Kids Media Measurement Frameworks: The industry could pursue a custom-built segmentation solution specifically designed for kids' media, acknowledging that this segment is fundamentally different from adult media. Such a framework would adapt standards to reflect privacy constraints, co-viewing dynamics (with recognition that parents serve as the primary economic buyers), and unique audience characteristics, rather than holding kids' media to the same benchmarks as general TV and digital measurement.

Developing a Synthetic Children's Population Dataset: This approach would leverage AI to develop synthetic data techniques which are able to simulate children's populations based on statistical distributions from census, survey, and panel sources. This could fill critical gaps where real data is restricted — such as YouTube viewing under 13 or gaming platform consumption — while preserving privacy. Synthetic modeling must be transparently documented, statistically validated, and independently audited to ensure credibility and avoid unintended bias.

The children's media market remains diverse, innovative and creative. Original digital-first IP like *CoComelon, Ryan's World, Ms. Rachel, The Guava Juice Show, PeaKeeBoo, Adopt Me!, Brookhaven RP* and *MeepCity* show that content created with kids in mind can capture the imaginations of all audiences. Consumption is more vibrant than ever, but the absence of robust, privacy-compliant measurement undermines both cultural value and the commercial sustainability of investment in children's IP. The industry now confronts a strategic inflection point: continued uncertainty will likely constrain investment, whereas coordinated reform can improve confidence and long-term sustainability.

The children's media ecosystem does not lack creativity, demand, or innovation. It lacks measurement infrastructure aligned with contemporary consumption patterns. Without reform, investment will continue to concentrate in low-risk franchises and challenging platform environments. With coordinated action, the industry can build a privacy-respecting measurement framework that supports sustainable investment, creative diversity, and long-term public value.

Chapter 1. The Children's Media Audience Today

The children's media audience is unique in its complexity due to its rapidly evolving sub segments. As of mid-2023, there were approximately 72.8 million children aged 0–17 in the United States. About 64% of U.S. households are classified as "family households," meaning a household containing at least one person related to the householder by birth, marriage, or adoption. Roughly 39% of these family households include at least one child under the age of 18, meaning that around 25% of all U.S. households have one or more children under 18. Four in five family households with a householder aged 35-39 included a child under the age of 18.[2]

Publicly available census data doesn't break this down specifically by households with children under age 12, but analyses of demographic age distributions suggest that children aged 0-11 account for approximately 60% of all minors (ages 0–17) and an estimated 15% of all U.S. households include at least one child under the age of 12.[3]

However, the children's media audience is extremely diverse. Industry practitioners commonly segment this audience into five distinct cohorts:

1. **Babies:** Ages 0-3
2. **Preschoolers:** Ages 2-5
3. **Kids:** Ages 6-11
4. **Tweens:** Ages 9-12 (overlapping with the kids segment)
5. **Teens:** Ages 13-17

Each of these cohorts has their own developmental, behavioral, and cultural characteristics that drive very different media consumption behaviors, and these behaviors have changed dramatically during the last decade:

→ Consumption of linear TV has declined, and is now very low, even negligible, for teenagers.

→ YouTube viewing is common across all cohorts, shifting from nursery rhymes through to gaming streams and influencers.

→ Gaming and short-form video (TikTok, Reels, Shorts) rise steadily with age, while co-viewing declines, with parents shaping early habits until kids shift to digital independence.

[2] United States Census Bureau, November 2024.

[3] For example, see Annie E. Casey Foundation's Kids Count Data Center.

Chapter 1. The Children's Media Audience Today

Figure 1: Children's Media Consumption Varies Widely by Age Cohort

Cohort	TV and Video Behaviors	Gaming Behaviors	Advertising Implications
Babies (0–3)	Mostly passive exposure to background TV; content like *CoComelon, Ms. Rachel* and *Sesame Street* on YouTube, streaming and PBS. Streaming is used for calming or co-viewing.	No structured gaming. May interact with sensory apps involving simple touch or sound-based play, often guided by parents.	Direct advertising is highly restricted due to COPPA. Marketing should target caregivers through family-safe environments and focus on trust, safety, education, and enrichment themes.
Preschoolers (2–5)	Heavy use of YouTube Kids, Netflix, Disney+, and PBS Kids. Increasing autonomy in choosing content, but still within parent-controlled environments.	Play simple mobile or tablet games, including educational. Game mechanics are basic, with no social interaction.	Brands must comply with advertising guidelines for young children.
Kids (6–11)	YouTube represents a substantial share of viewing (gaming, learning content, music, humor). Streaming platforms used for both animation and live-action series. Content selection is largely independent. Linear TV used mostly for family events.	Gaming becomes central: Roblox, Minecraft, and Nintendo Switch games are dominant. Social play emerges, with in-game chat and friend-based play becoming common.	Kids are highly engaged with content and characters. Brand safety is essential. Best practices include content adjacency, kid-safe game integrations, and toys/ merchandising linked to media franchises.
Tweens (9–12)	Peer-driven preferences emerge. Heavy consumption of YouTube Shorts, TikTok (if permitted), and influencer content. Binge-watching of episodic streaming shows is common, often on personal devices.	Gaming expands to Fortnite, FIFA, and competitive social games. Use of Discord, SNAP and interest in esports or streamers begins to grow.	Tweens respond to influencer culture and social belonging. Marketers should explore creator partnerships, esports sponsorships, and safe brand integrations into platforms used by this cohort. Parents still influence purchase decisions.
Teens (13–17)	Linear TV nearly disappears. Dominated by TikTok, Instagram Reels, YouTube, and long-form streaming (Netflix, Hulu, Disney+). Personal device viewing is the norm. Content preferences are diverse and identity-driven.	Gaming is immersive and social: FPS games, competitive online play, Twitch viewing, Discord communities. Esports fandom and creator loyalty are strong.	Teens are culturally literate and skeptical of overt marketing. Authenticity is critical. Successful campaigns involve peer-endorsed content, in-game activations, and community-focused storytelling. Household and brand trust remain important for large purchases.

Chapter 1. The Children’s Media Audience Today

Importantly, the US children’s audience is also ethnically diverse. Around 47.5% of U.S. children under 18 are white (non-Hispanic), 26.9% are Hispanic or Latino, 12-13% are Black or African American (non-Hispanic), and 6-7% are Asian (non-Hispanic).

Children’s cognitive development also varies significantly across these cohorts. Children under the age of 8 cannot reliably distinguish between advertising and content, children under 12 have a limited understanding of data collection and privacy implications, and adolescents have more sophisticated media literacy skills but remain vulnerable to manipulation.

These characteristics — a diverse, dynamic population with fragmented viewing behaviors across an array of platforms, devices, formats and services, and serious regulatory responsibilities — would pose significant measurement challenges even in a mature, stable industry. However, the children’s media industry has been anything but stable, having experienced a dramatic series of disruptive changes during the last 20 years.

Chapter 2. A Changing Children's Media Market

To understand the challenges currently facing the children's media industry, it's helpful to look back at the industry's dramatic evolution.

Growth and Consolidation (1990s — 2015)

The advent of kid-specific TV channels was brought on by the expansion of cable in the 90s, culminating in the launch of Cartoon Network, Nickelodeon, and Disney Channel. This provided a solid springboard for numerous family-oriented IP. By 2010, these channels had solidified with an international footprint creating a powerful ecosystem to launch franchises with worldwide appeal.

This era was characterized by relative measurement simplicity and commercial certainty. Ad-sales and Pay TV distribution deals unpinned lucrative and consistent revenue streams. Linear television provided established viewership metrics through standard panel-based measurement systems. With a limited number of distribution points and a concentrated ecosystem, producers, broadcasters, and advertisers enjoyed a measurement model that, while not perfect, offered reasonable clarity about audience behaviors.

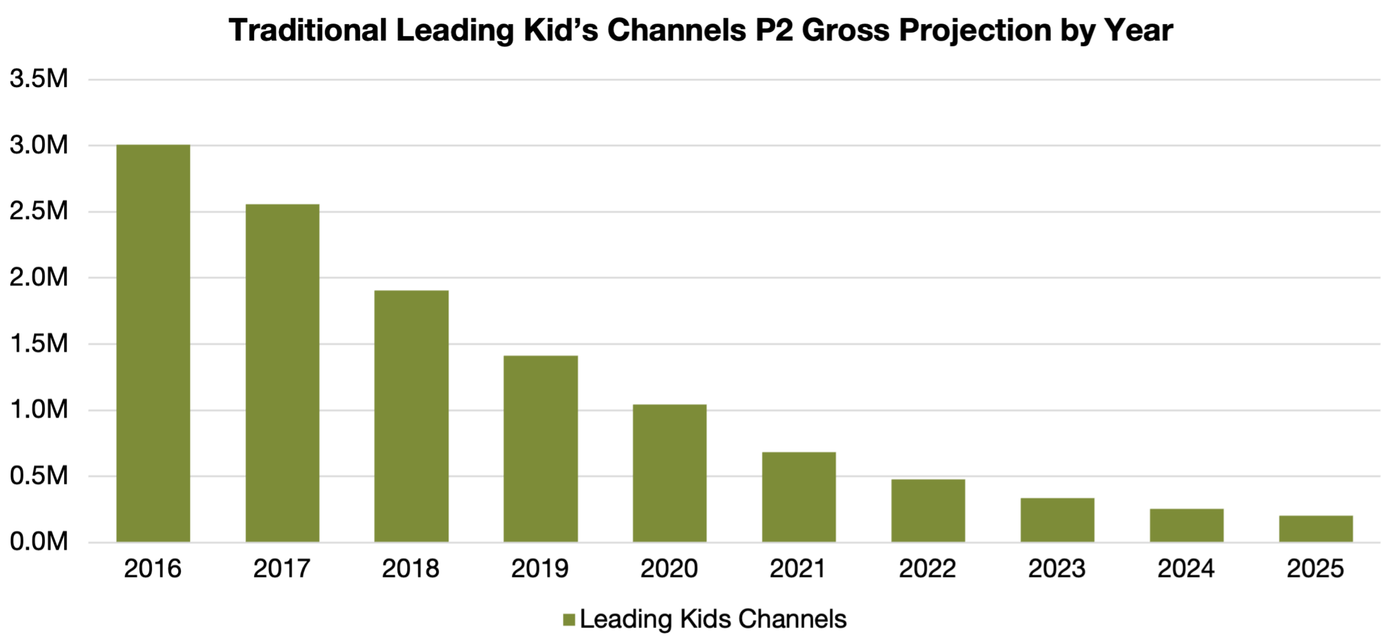
Viewing patterns were predictable, and programming strategies and playbooks became well-established. The business model was clear: build an audience through linear television, secure master toy deals, and expand the franchise through multiple seasons and consumer products.

For advertisers and marketeers there was certainty too. Linear ad spends would flow in line with the annual ad market, ramping up in the lucrative back-to-school through Christmas period. Although digital advertising was undoubtedly growing, the comfortable reliability offered by linear was far more appealing.

Re-distribution of Viewing and the Growth of Digital (2016 — Present)

Around 2016, a profound shift was becoming observable in the landscape. Digital platforms were capturing an increasing critical mass of children's attention. This inflection point marked the beginning of a precipitous decline for traditional kids' linear channels that would dramatically accelerate over the following years.

Figure 2: Kids' Channel Viewership, 2016-2025



Source: Nielsen

Chapter 2. A Changing Children's Media Market

YouTube emerged as the main beneficiary of television's decline, capturing the lion's share of children's attention as they migrated away from linear TV channels. Unlike other disruptive platforms that merely fragmented viewership, YouTube fundamentally transformed the content ecosystem by democratizing production and distribution. This transformation gave rise to the creator economy, where individual content producers could build massive child audiences without traditional gatekeepers. By the mid 2010s, children's content creators like *Ryan's World* (then *Ryan ToysReview*) were generating billions of views annually, while animation studios outside the traditional system, such *CoComelon* and *Little Baby Bum*, were building global audiences. YouTube was rapidly evolving into a comprehensive one-stop shop for the entire children's content value chain.

From 2019, the race to streaming would also intensify linear decline. Corporate media stakeholders would pivot priority focus to streaming through Disney+ (2019), HBO Max (2020) and Paramount+ (2022). By 2023, ratings for the once-dominant Disney Channel, Cartoon Network, and Nickelodeon had plummeted to approximately one-quarter of their 2016 levels. This represented a substantial structural contraction of the linear kids' television model that had defined the industry for decades.

The consequences were far reaching as the broader commercial model built around linear distribution came under sustained pressure. As corporate media companies revealed their D2C streaming ambitions, distribution revenue started to evaporate from both a platform and content point of view. Alongside this, TV advertising revenue also saw decline. These multiplying factors forced networks to reduce original programming budgets.

From a franchise point of view, the predictable path from broadcast success to consumer products became increasingly uncertain. International channel distribution, once a reliable growth engine, faced contraction as cable and satellite subscriptions declined globally. New digital business models were being invented via YouTube IP, but the opportunity for 360 degree franchise activation lagged behind as licensees and retailers remained reticent to commit to without a tried and tested strategy.

More fundamentally, the measurement certainty that had characterized the linear TV marketplace eroded. The concentrated, relatively transparent ecosystem gave way to a fragmented landscape where children's attention was distributed across multiple platforms, many with limited or no audience measurement disclosure. It was no longer possible to rely on a single set of metrics to evaluate success, and advertisers lost confidence in their ability to reach children's audiences at scale through traditional means. Alongside this, digital regulatory requirements also evolved, creating further ambiguity for advertisers on the way forward to reach family audiences.

These measurement limitations create cascading effects throughout the children's media ecosystem. Major studios and TV networks have strategically recalibrated.

> ***From a linear perspective we know that the reach is declining each year, so our goal is to win share of viewership with those still watching cable for each hour of the day – so very much a time spent viewing strategy. For our streaming business we are focused on broader reach hits and franchises that can drive subscriptions and then keep those kids within the platform with library content.***
>
> *– Senior Studio Executive*

This strategic pivot reflects the industry-wide challenge of adapting content strategies to a fragmented marketplace in which traditional success metrics are in the process of being reinvented and measurement has become far more challenging.

This transformation created significant measurement gaps. While the decline of linear viewership is well-documented, comprehensive measurement solutions capturing the full breadth of children's media consumption across platforms remain elusive. The industry now operates in an environment characterized by expanding consumption but declining standardized visibility.

Chapter 2. A Changing Children's Media Market

The Digital Media Market

Children's screen media consumption now encompasses:

- Linear television (broadcast and cable).
- Streaming services (Netflix, Disney+).
- Online video platforms (YouTube).
- Social platforms (TikTok, Snapchat, Instagram).
- Gaming environments (Roblox, Minecraft, Fortnite).
- Gaming technology (consoles, desktop, mobile).
- Music, audio, podcasting and audio-devices (tonies, Yoto).
- Mobile apps and websites.
- Out-of-home experiences.

This fragmentation creates fundamental measurement challenges that go beyond technical limitations to represent a structural transformation of the media landscape. Each of these environments has unique measurement approaches, metrics, and limitations. A child might engage with the same IP across multiple platforms in a single day — watching *Miraculous Ladybug* on Disney+, viewing clips on YouTube, and playing a *Miraculous*-themed game on Roblox — yet current measurement systems treat these as entirely separate activities.

This granularity becomes critically important when measuring content performance and effectiveness, as the engagement patterns of a preschooler watching *CoComelon* differ fundamentally from those of a tween engaging with content on Roblox. Developmental differences between between early childhood and adolescence create materially different consumption patterns.

> ***A 5-year-old and a 12-year-old are practically different species.***
>
> *– Senior digital media executive*

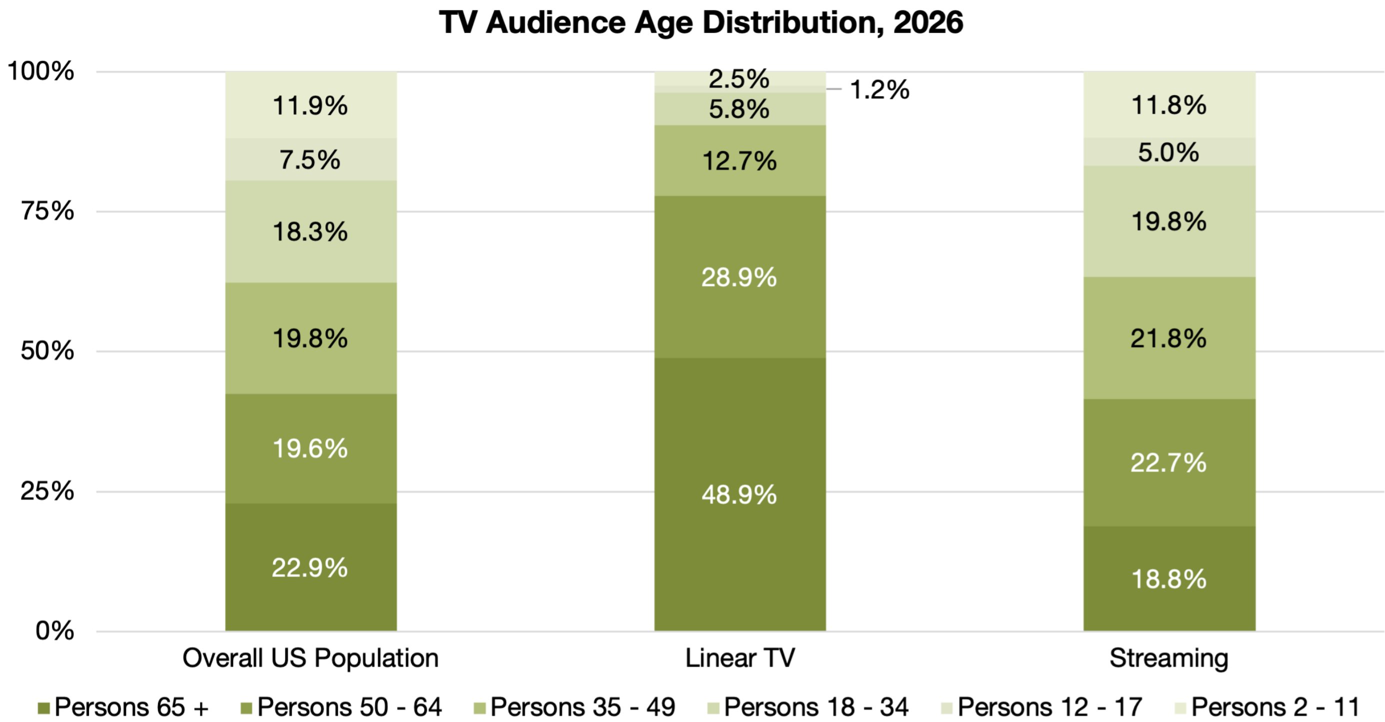
Total daily screen time for young children (ages 0-8) has increased from approximately 1 hour 44 minutes in 2005 to 2 hours 27 minutes by 2025, with mobile devices shifting from virtually no usage to dominating consumption patterns[4]. For tweens and teens, entertainment screen time has grown from around 6.5 hours daily in 2005 to 7.5+ hours by 2025, though this increase is modest compared to the fundamental shift in platform preferences.

Children's engagement with digital platforms is pronounced, representing 19% of streaming consumption and nearly a quarter of YouTube viewership[5]. These audiences demonstrate unique consumption behaviors, including high volumes of repeat viewing, extensive co-viewing with family members, and rapid migration between platforms and content formats.

[4] Common Sense Media, *Media Use by Kids Age Zero to Eight* (2025); Kaiser Family Foundation, *Generation M: Media in the Lives of 8-18 Year-olds* (March 2005).

[5] ibid

Figure 3: Children's Presence on Streaming Platforms



Source: Nielsen, National TV Panel and Streaming Meter Homes, January 2026

The most significant changes are not in total viewing time but in platform distribution. Traditional linear television, which dominated children's viewing in 2005, represented only around 6% of total viewing time for young children by 2025[6]. Streaming platforms and YouTube now dominate the landscape, accounting for 67% of video consumption (35% for streaming channels and 32% for YouTube), while short-form content on platforms like TikTok and YouTube Shorts represents an additional 16% of viewing time.

This platform fragmentation reflects broader changes in how children discover and consume content, shifting from scheduled programming blocks to algorithm-driven, on-demand experiences across multiple devices. The implications for measurement are profound, as children's attention is now distributed across an ecosystem that traditional television metrics were never designed to capture. While overall screen consumption has increased, the industry's ability to measure that consumption through standardized methodologies has weakened. Viewing that once occurred in environments with shared measurement standards is now distributed across platforms that use different data definitions, reporting structures, and disclosure policies.

[6] Common Sense Media, *The Common Sense Census: Media Use by Kids Age Zero to Eight* (2025).

Chapter 2. A Changing Children's Media Market

Figure 4: The Redistribution of Children's Screen Time

Metric	2005	2025	Key Change
Ages 0-8 Daily Screen Time	1h 44min (mostly TV)	2h 27min (mobile-dominant)	+43min, platform shift
Ages 8-12 Daily Screen Time	Part of 6.5h general media	5h+ entertainment screen	Separate tracking, higher usage
Ages 13-18 Daily Screen Time	6.5h entertainment media	7.5h+ entertainment screen	+1h increase
Mobile Device Usage (0-8)	~5 minutes/day	Dominant platform	Significant structural shift
Live TV Share (0-8)	~80-90% of video time	6% of video time	Dramatic decline
YouTube/ Streaming Share	Minimal	67% of video consumption	New dominant platforms

Source: Kaiser Family Foundation and Common Sense Media[7].

Beyond platform and device fragmentation, children's content interests have fragmented into increasingly niche categories and interests. Previously, a small set of popular programs captured the vast majority of children's attention, but today's landscape features:

→ Highly specialized content categories served by specialized YouTube channels.

→ Gaming communities built around specific titles or genres.

→ Influencer ecosystems catering to particular interests or demographics.

→ User-generated content that may exceed professional content in engagement.

[7] Kaiser Family Foundation, *Generation M: Media in the Lives of 8-18 Year-olds* (March 2005); Common Sense Media, T*he Common Sense Census: Media Use by Kids Age Zero to Eight* (2025); Common Sense Media, *The Common Sense Census: Media Use by Tweens and Teens* (2021).

> ***In preschool, children's viewing tends to be dominated by 10-15 major franchises. Once kids assume control of their viewing, their interests fragment so acutely that seeing any signal for what's hot or not is challenging.***
>
> *– Children's Media Specialist*

This fragmentation creates not just measurement challenges but fundamental questions about what constitutes success in children's media. Where traditional measurement could identify hits through ratings, today's fragmented landscape may feature content with passionate but relatively small audiences across multiple platforms — audiences that may collectively represent significant opportunity but are difficult to measure holistically.

The Democratization of Creativity and Content Development

The fragmentation of children's media consumption has been accelerated by the rapid democratization of tools for intellectual property development. Traditional barriers that once limited content creation to well-funded studios have largely dissolved through accessible animation software, consumer-grade production equipment, and AI tools that enable individual creators to produce broadcast-quality content.

Social platforms have eliminated distribution gatekeepers, providing direct access to global audiences without broadcast deals or streaming partnerships. This has created an explosion of diverse voices and niche content that can build passionate, sustainable fandoms around specific interests, cultural traditions, or unique creative approaches that major studios might consider too small to target.

The result is a children's media landscape that is more diverse and responsive to audience needs than ever before, but exponentially more complex to measure. Where traditional measurement could focus on a relatively small number of major properties, today's ecosystem requires tracking thousands of active creators and emerging properties across dozens of platforms, with success redefined beyond mass market appeal to include sustainable niche audiences and cross-platform community building. The volume of IP is likely to increase as AI-enabled production tools become more widely adopted.

Platforms Shape Content Discovery and Creation

The media ecosystem is increasingly shaped by diverse, platform-specific algorithms and economic models that drive strategies in directions that don't always align with audience interests, content quality, or measurement accuracy. These divergent incentives create structural problems that can undermine both content creation and effective measurement.

The major online video platforms rely strongly on personalization of search results and recommendations to help users find content and matching content t\o users. Ad-funded platforms also use personalized advertising to improve monetization.

Over time, the major platforms have developed proprietary algorithms designed to maximize specific business objectives, creating disparate incentives for content creators:

- YouTube rewards watch time, session length, and thumbnail click through rate, encouraging regular posting, elongated content and catchy thumbnails. YouTube also incorporates quality measures, as outlined in Google's best practices for kids and family content guidelines.
- TikTok prioritizes completion rate and virality, pushing creators toward hook-driven, short-form formats.
- Netflix weights initial 28-day performance heavily, disadvantaging content that builds audience gradually.
- Gaming platforms value engagement time and monetization opportunities, potentially at odds with educational value.

Chapter 2. A Changing Children's Media Market

The requirement to continuously feed platform algorithms creates pressures to prioritize quantity and algorithm optimization, rather than investing in content that might satisfy educational and other requirements. This is markedly different to public service media.

The resulting fragmentation of audience across platforms can create conflicting incentives that force content producers to make strategic compromises:

- Format fragmentation requires creating multiple versions of content at different lengths and styles.
- Platform-specific optimization may require content adjustments that compromise creative vision.
- Resource allocation becomes driven by platform algorithmic rewards rather than audience value.
- Brand consistency becomes difficult to maintain across platforms with different incentive structures.

Chapter 3. Why Children's Media Measurement Matters

Against this backdrop, it's important to be clear about why children's media measurement matters. Measurement serves a range of interconnected use cases across the children's media marketplace, supporting three sets of vital functions:

> ***Kids media measurement matters because it's how we show this audience counts. Families, especially young children, are massive consumers of content, yet they're often left out of the bigger measurement conversation. If we can't prove their engagement, we can't make the case for investing in quality, educational, and brand-safe content. And that's a real risk, especially as public funding dries up, and major publishers exit the space.***
>
> *– Senior Digital Media Executive*

1. Cultural and Public Service Functions

Children's media carries cultural weight. It plays a formative role in education, identity, and civic participation. Regulators and civil society groups depend on measurement to monitor exposure to sensitive categories of advertising, assess whether children are equitably served, and ensure that protections for vulnerable audiences are upheld. Accurate measurement ensures that policymakers, educators, and public service broadcasters have visibility into what children are watching, how, and on which platforms. This evidence base supports investment in culturally relevant content and helps ensure that children from all communities are adequately served.

In children's media, measurement serves as a critical proxy for audience satisfaction and preference, since traditional feedback mechanisms are limited by developmental capabilities and privacy restrictions. Viewership patterns and engagement metrics become the primary way young audiences communicate their content preferences, making accurate measurement essential for understanding whether programming truly serves its intended audience.

2. Policy, Regulation, and Safeguarding Functions

Regulation of children's advertising and media is a sensitive, high-stakes area. Authorities in the U.S. and internationally have established strict frameworks (COPPA, GDPR-K, Ofcom rules in the UK, etc.) to protect children's privacy and prevent exposure to inappropriate marketing. Effective enforcement depends on measurement. Without visibility into what content children consume, on what devices, and alongside which forms of advertising, regulators cannot properly safeguard audiences — or hold companies accountable.

> ***Kids' media deserves measurement that values trust, co-viewing, and positive impact, recognizing the family audience as one of the most powerful forces in media.***
>
> *– Senior Digital Media Executive*

3. Economic and Commercial Functions

Children represent a distinctive and valuable audience. They are influential consumers in their own right, driving direct demand for toys, games, clothing, and entertainment. Equally important, they act as powerful influencers on household purchasing decisions, from food and technology to travel and leisure.

In addition to this, children's content uniquely captures adult attention through co-viewing, particularly for children under eight where parents serve as primary content decision-makers and gatekeepers. This dual-audience dynamic creates significant advertising opportunities that current measurement do not adequately quantify.

Chapter 3. Why Children's Media Measurement Matters

For advertisers, accurate and privacy-compliant measurement is essential in justifying investments, allocating budgets effectively, and avoiding wasted spend. Marketers use measurement to target campaigns, optimize cross-platform reach and frequency, ensure brand safety, demonstrate compliance, and evaluate return on investment.

For content producers and distributors, measurement provides the data needed to secure financing, make programming decisions, and evaluate success across platforms. It helps them to understand the audiences they are serving, assess the performance of their programming, determine commissioning priorities, establish marketing and distribution strategies, and negotiate distribution and funding. When measurement signals become fragmented or inconsistent across platforms, the ability to evaluate the economic performance of children's content becomes more uncertain. This uncertainty can make studios, distributors, and advertisers more cautious in allocating capital to new children's programming, particularly when competing investment opportunities offer clearer performance signals.

> ***The measurement matters because it tells us what is working. We want to make kids happy, so by understanding what is generating viewership and resonating with certain age groups we can then invest in the type of content they love. Accurate measurement is their voice — it's kids telling us whether a show needs to be picked up for another season or not.***
>
> *– Senior Studio Executive*

The Consequences of Losing Visibility

The absence of holistic measurement carries significant consequences:

→ Failing confidence in the reasons for investing in quality children's content. Without proper measurement the case for continuing to invest in quality kids content is evaporating. Many established commissioners, both commercial and public, have already pulled back or restructured production commitments.

→ Regulatory blind spots: Without cross-platform visibility, regulators cannot accurately monitor children's advertising exposure, undermining trust and accountability.

→ Lost opportunities for innovation: Inadequate measurement stifles innovation and experimentation, making it harder to innovate effectively and to unlock the potential of new platforms, formats and viewing experiences.

→ Fragmented decision-making: With siloed datasets, content creators and advertisers are forced to make strategic choices based on incomplete information, which distorts investment flows and makes it difficult to deliver content that meets the needs of audiences across different platforms.

→ Misallocation of ad spend: Advertisers over-invest in visible platforms and under-invest in environments where children are highly engaged but poorly measured, such as gaming or apps.

→ Commercial disadvantages: Traditional broadcasters and content producers are left unable to prove their reach, weakening their leverage in negotiations with advertisers and distributors.

Chapter 4. Measurement Challenges in the Current Media Market

Today, the children's media measurement landscape comprises a patchwork of providers, covering different aspects of the ecosystem and providing powerful insights into the media consumption behaviors, preferences and attitudes of children. However, current solutions do not offer the comprehensive, cross-platform visibility that stakeholders increasingly require. Understanding the capabilities and limitations of these providers is essential for contextualizing the measurement challenges facing the industry.

The Problems with Panels

Panel-based measurement providers like Nielsen and Comscore offer some of the most established methodologies for understanding the media consumption behaviors of younger audiences. These providers segment children's audiences into distinct age brackets (typically 2-12 and 13-18), recognizing that a single kids demographic bucket can be misleading given the vast differences between a 6-year-old's media consumption and that of a 17-year-old.

> ***It is important to acknowledge that grouping exposures into a single "kids' demo bucket" can be a bit misleading. While measurement solutions attempt to deliver some delineation in kids' audience profile (in Nielsen's case, e.g. persons 2-11, or persons 12-17), it is evident that there is a large difference between the media consumption behaviors of a 6 year old, versus that of a 11 year old, or a 12 year old vs a 17 year old).***
>
> *– Senior Measurement Vendor Executive*

Panel methodologies offer significant advantages for children's measurement from a regulatory perspective. They are privacy compliant, securing explicit parental consent for tracking minors' viewing behaviors. This consent-based approach provides verifiable empirical data that becomes essential input for algorithms and models producing person-level audience estimations.

However, panel approaches face inherent limitations when it comes to understanding younger audiences in today's marketplace. Panels were designed for a broadcast world with a small number of high-reach channels. Children's media consumption is now fragmented across hundreds of TV channels, streaming services, YouTube offerings, gaming environments and other offerings. In a panel of 50,000 households, perhaps only 5,000 may have children under the age of 12 years old. Once you divide that across age cohorts (toddlers vs tweens vs teens) and then across platforms, sample cells shrink to single digits, statistically unstable for content- or advertiser-level reporting.

Moreover, when children's attention is fragmented across long-tail services, a single household's behavior can disproportionately affect results. This creates volatility in reported ratings and risks undermining trust among advertisers looking for stable, currency-grade measurement.

The distribution of viewing across different devices, with kids moving fluidly between TVs, tablets, phones, consoles, VR, and handheld gaming devices, often in the same day, compounds this fragmentation challenge, with most panel technologies (people-meters, router-meters, or app trackers) focusing predominantly on TV-centric viewing, leaving large blind spots in mobile and gaming consumption. Even when the device is known, it's hard to know who in the household is watching (e.g., child alone, child + parent co-viewing, or parent using the device).

Chapter 4. Measurement Challenges in the Current Media Market

> ***While panel-based solutions (particularly those involving people meters and button pushing) are a solid approach to capturing co-viewing, these methods are known to underestimate co-viewing rates. This is particularly challenging in respect of kids' measurement where younger demographic groups in particular are likely to be watching content with a parent, or with others. Ensuring measurement solutions recognize this bias and have the necessary compensating controls is essential in understanding unique reach calculations.***
>
> *– Senior Measurement Vendor Executive*

Gaming presents an additional set of challenges for traditional panel-based measurement solutions. Gaming environments like Roblox, Fortnite, and Minecraft account for huge shares of kids' screen time, but they are not linear media and don't fit panel-style logging. These environments are interactive, session-based, and user-generated, with no standardized program units to measure. Panels cannot observe or classify these experiences without direct partnerships with platforms. Platform-level data sharing practices vary significantly, limiting third-party visibility.

Maintaining a representative panel for children's media consumption is also challenging and expensive. Kids grow quickly through cohorts quickly (preschool → school-age → tween → teen). Panels must constantly recruit and replace children to remain representative. This constant churn makes it difficult to maintain longitudinal stability or calibrate trends reliably. Moreover, panel recruitment is especially challenging for some multi-ethnic audiences.

The result is that traditional panels can no longer provide stable, representative, or holistic visibility into kids' viewing, unless they are fused with large-scale privacy-preserving data sources and contextual reporting from platforms.

Big Data is not a Panacea for Children's Media Measurement

Across the wider marketplace, measurement providers are increasingly fusing panels with big data sets from Smart TV ACR solutions, set-top boxes, streaming services and ad servers to provide better visibility of viewing across a more fragmented media marketplace. Panels tell you who is watching (demographics, age, gender, household composition, etc.), while big TV data sets (ACR from smart TVs, set-top box data, streaming data, ad server logs) provide scale and granular insights into what was watched.

Identity spines (large-scale identity graphs or synthetic population backbones) are what link the two: they allow measurement providers to project panel-observed insights about who was watching onto the data about what was watched. This is at the level of individuals or households, connecting the person-level truth of panels to the massive but anonymous behavioral logs of big data. Identity spines and identity resolution are the glue of modern TV measurement, allowing panel findings to be upweighted and scaled to the entire population. Without identity resolution, the same household could be counted multiple times across different data feeds. Identity spines allow for deduplicated reach and frequency, by tying together exposures from different devices/platforms to a single household or person.

Identity resolution also allows TV exposure data to be linked to purchase data, CRM files, or third-party segments in a privacy-safe way, relying on hashed, anonymized identifiers or modeled synthetic households. This makes it possible to integrate disparate data sets while respecting laws like CCPA, GDPR, and COPPA (especially important when children may be present in the audience).

However, children can be hard to find in big TV data sets and identity solutions. Children under 12 years old generally don't have phones, email addresses, or subscription accounts in their own names. They are not bill payers or homeowners. They are largely invisible in ID-based data systems, making it hard to extend panel findings to population-level models. Big data sets may identify that children's TV programs were viewed in a particular house or on a TV, but they don't tell you who was in the room viewing.

Chapter 4. Measurement Challenges in the Current Media Market

Understanding YouTube Audiences

YouTube's first-party analytics represent both a positive and limiting children's measurement solution. The platform provides extensive data on an individual channel or network level including views, watch time, audience retention, traffic sources, and subscriber growth. However, regulatory compliance creates significant data discontinuities: YouTube Analytics only provides demographic data for users 13 and older due to COPPA restrictions, making it hard to understand viewing by the platform's substantial under-13 audience.

The only option is to focus on content performance metrics that lack audience context. Additionally, YouTube's measurement inconsistencies with other platforms — such as its 30-second threshold for view counting — complicate cross-platform measurement efforts.

The other limitation of YouTube measurement is that it's only available on a proprietary channel basis. Access to competitor performance or any benchmarking isn't natively supported. Third-party YouTube measurement solutions, provided by vendors like Tubular Labs, only go so far and don't generally cover the detailed key metrics that are known to drive decisions, like watch time.

However, providers face fundamental limitations stemming from their reliance on platform-reported metrics. They cannot verify unique viewers, provide demographic overlays, or access data beyond what platforms make publicly available. For children's content, this means identifying content themes and performance patterns without understanding audience composition or demographic engagement.

Gaming Platforms

Gaming platforms provide first-party data including daily active users, engagement time, in-game purchases, and content popularity metrics. However, gaming measurement for children faces significant challenges. Panels face structural limitations in capturing interactive gaming environments without platform-level integration, but privacy considerations limit demographic granularity. Platform analytics typically aggregate data across age groups without specific demographic detail, making it difficult to understand children's specific gaming behaviors and preferences.

The disconnect between gaming measurement and broader media consumption creates additional strategic challenges. Gaming platforms operate as isolated measurement environments with no reliable connection to video content consumption, despite gaming representing a significant portion of children's screen time and often featuring the same intellectual properties consumed across other media formats.

Independent gaming measurement providers track player counts, session length, in-app purchases, and retention metrics across various gaming platforms and titles. However, measurement remains highly fragmented across different gaming environments, with limited connection to broader media consumption patterns. Privacy restrictions on tracking younger players create systematic gaps in understanding how children engage with gaming content relative to other media experiences.

Social Media Measurement

Social media platforms provide first-party analytics including followers, engagement rates, reach, impressions, and video views. However, measurement of children's social media consumption faces systematic restrictions due to platform terms of service that generally limit official usage to users 13 and older. This creates a measurement void around widespread underage platform usage that significantly underrepresents actual consumption patterns.

The fragmentation extends beyond age restrictions to metric inconsistency across platforms. View definitions, engagement calculations, and reach methodologies vary widely between platforms, making cross-platform measurement and strategy optimization extremely difficult. Children's media companies operating across multiple social platforms must navigate entirely different measurement frameworks without reliable conversion methodologies.

Independent social media measurement providers focus primarily on engagement analysis, sentiment tracking, share of voice calculations, and brand mentions. For children's media measurement, these services provide very limited value, typically focusing on parents and adults discussing children's brands rather than direct audience measurement. The inability to track underage users, combined with challenges in connecting social metrics to broader media consumption patterns, limits the strategic value of third-party social measurement for children's content strategies.

Platform-level Advertising Tracking

Digital advertising platforms provide first-party measurement including impressions, clicks, video completion rates, and conversion tracking. However, children's advertising measurement faces severe restrictions due to COPPA and similar regulations that prohibit personalized advertising measurement for known child audiences. This creates systematic exclusion from performance-based advertising measurement, limiting the ability to optimize campaigns or demonstrate effectiveness when reaching families.

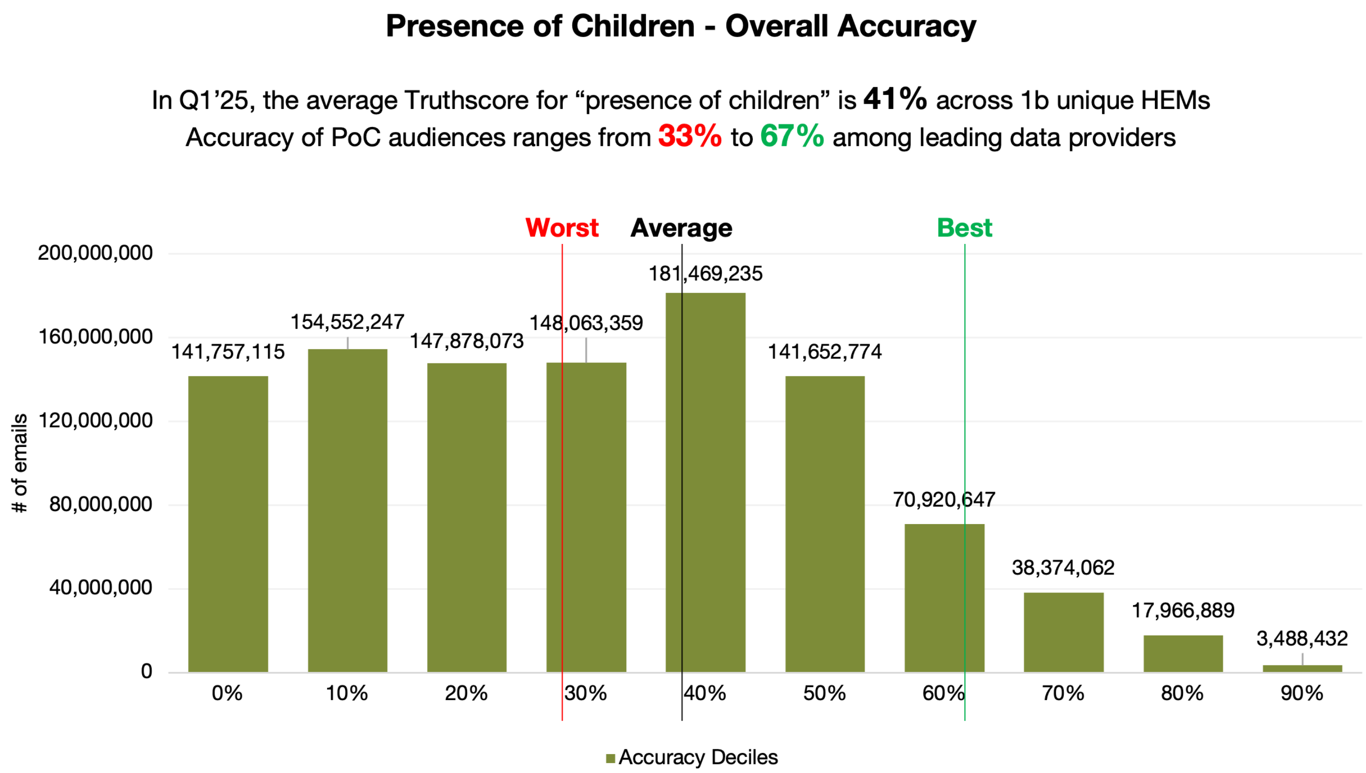
The regulatory constraints extend beyond measurement limitations to fundamental infrastructure incompatibility. Many standard advertising technology platforms are not designed for COPPA-compliant environments, effectively excluding children's content from programmatic advertising opportunities and performance measurement tools used throughout the rest of the industry.

Data Accuracy Challenges

Household-level inference and probabilistic methodologies rather than direct measurement may be sufficient for some purposes. However, these approaches also face accuracy challenges.

A Truthset analysis of over 4 billion U.S. consumer records from Q4 2024 suggests that accurately identifying whether a woman is a mother or has children in the home remains a struggle. Data for female consumers is correct 83.9% of the time, and for male consumers, it's accurate 82.2% of the time. But when it comes to identifying whether a female has children present in the home, accuracy plummets to just 36.5%. For males, the accuracy drops even further to 28.7%. Overall, the presence of children in a household is only correctly identified 42% of the time.[8]

Figure 5: Truthset Analysis of Presence of Children Datasets



Source: Truthset

[8] Truthset, *Presence of Children Data Accuracy Analysis* (2025)

Truthset's analysis also found that the accuracy of this data degrades significantly when activated in media or matched to other data sources, dropping by up to 50% with each match process.

What makes data accuracy challenging? Gender can often be inferred (though imperfectly) from first names, survey data, and consumer registrations, but parental status, by contrast, isn't systematically collected in most consumer-facing databases. Few people disclose in a form or transaction whether they have children, and when they do (e.g., loyalty program sign-ups, baby registry participation), the data is siloed, outdated, or incomplete.

Moreover, alongside childhood, parenthood is a time-sensitive status — a woman pregnant today, a father of a toddler tomorrow, and later a parent of teens. Data providers often fail to keep pace with how quickly these categories change. A household might subscribe to Parents Magazine or buy diapers for a few years, but those signals lapse as children age, leading to misclassification if the data isn't refreshed frequently. Many datasets infer "children in household" from purchases (e.g., toys, diapers, back-to-school items) or subscriptions, but these purchases might be for nieces/nephews, grandchildren, or gifts, not proof of children living in the home.

For men especially, data often fails: a male consumer might buy diapers once, which is logged as a "parent" signal, but it could have been a one-off purchase. This explains why accuracy for men (28.7%) is even lower than for women (36.5%).

Gender inference models are relatively mature (using names, third-party enrichment, etc.), but parenthood, by contrast, is inferred indirectly, often via predictive models rather than direct observation. This leads to a much higher error rate.

Many parental signals sit at the household level (e.g., census block data, household purchase histories). Linking those to an individual adult identity is error-prone, especially when multiple adults live together. As Truthset's analysis notes, each data match degrades accuracy by up to 50%, because probabilistic matches spread parental signals incorrectly across linked IDs. In some cases, data and identity providers rely on self-reported survey data, which is prone to underreporting (parents skip questions) or overreporting (to qualify for incentives). Retail signals also skew toward certain categories (e.g., baby products, toys), which bias models toward parents of young kids while missing parents of older children.

Some industry participants argue that these issues are exacerbated because economic incentives in the advertising ecosystem don't currently reward data accuracy. Data providers and targeting solutions are often rewarded or valued on their reach potential rather than precision.

It's common for marketers, agencies, or DSPs to benchmark data sources and segments by how many unique users they can reach (or addressability potential) rather than by how clean or validated those audiences are. Vendors often win on reach or match rates, all else equal, because that gives the client theoretical scale. Market incentives may prioritize scale and match rates over independently validated accuracy. Clean, high-accuracy audiences often come with lower coverage (fewer matched users), which reduces scale and statistical robustness for targeting. In competitive procurement, a vendor with 90% accuracy but only 5% reach may lose to one with 60% accuracy but 20% reach. There is a structural trade-off: as you tighten filters to improve accuracy, you also shrink addressable audience, which raises cost and fragility. These problems are compounded in multi-hop data chains (data provider → data aggregator → DSP → publisher).

On a related theme, many advertisers do not have independent or third-party audits of data accuracy; instead, they rely on vendor claims of match rates and coverage. Limited third-party auditing may reduce accountability incentives. Agency or tech-stack incentives may further reinforce this: agencies may prefer data that leads to larger commissionable media flows even if targeting is noisier.

Some vendors differentiate on accuracy and validation standards: premium audience providers, specialized identity vendors, and clean-room / "certainty score" solutions often try to differentiate on quality. So "volume over accuracy" is not universal. Pockets of the market are pushing back (demanding cleaner data, investing in measurement calibration, adopting "lift-based" rather than last-click models). But unless the economic incentives and measurement architectures shift (so that accuracy is a first-order value metric, not a secondary one), distortions are likely to persist.

For many advertisers, scale is a binding constraint; sometimes accepting noisier targets is a practical necessity when first-party data is thin. In some contexts (e.g. broad branding campaigns), approximate targeting is "good enough" if the signal is directionally correct; the fine margins may not matter as much. However, the challenges facing marketers looking to reach families are pronounced.

Summing up, parental status is difficult to measure because it is dynamic, context-dependent, and rarely declared in commercial datasets. Providers are forced to rely on proxies (purchases, subscriptions, surveys, household-level inference), which introduce systematic noise. The combination of weak signals, household ambiguity, privacy restrictions, and data degradation through matching explains why accuracy lags far behind gender classification.

In Summary: Measurement Challenges in Today's Market

The fragmentary nature of current measurement solutions creates several critical challenges that impact the entire children's media ecosystem:

→ **Incomplete Audience Picture:** No single provider offers comprehensive visibility into children's media consumption across all relevant platforms, creating systematic data discontinuities in understanding total reach, engagement, and audience behavior patterns.

→ **Metric Inconsistencies:** Different measurement methodologies, definitions, and calculation approaches across providers make it impossible to create equivalency across platforms or develop unified planning and optimization frameworks.

→ **Supply Chain Data Degradation:** Even when high-quality audience data exists at the source, accuracy deteriorates dramatically as information moves through media and advertising supply chains, particularly impacting targeting and measurement precision for children's audiences.

Chapter 5. Privacy Considerations in the Children's Market

The children's media measurement landscape is significantly shaped by regulatory frameworks rightly designed to protect children's privacy and safety online. While these regulations serve a valuable and critical role in safeguarding vulnerable audiences, they simultaneously create significant constraints on measurement capabilities, as well as unforeseen consequences on the broader ecosystem.

Privacy regulations are important and play a vital role. Children's audiences require special consideration due to their developmental vulnerability and legal status and, consequently, regulators in the EU and USA have generally placed a premium on children's privacy. Unlike adult audiences, children are recognized under law as requiring protection from data collection, behavioral tracking, and commercial manipulation. This protection reflects fundamental principles about childhood development, cognitive capacity, and the responsibility of society to safeguard young people as they navigate an increasingly complex digital landscape.

The regulatory frameworks governing children's media measurement stem from well-established research in child development that demonstrates children's limited ability to understand data collection, advertising intent, and long-term consequences of digital interactions. Children under 13, in particular, are recognized as lacking the cognitive development necessary to provide meaningful consent to data collection practices that are routine for adult audiences. The legal framework protecting children's digital privacy covers a wide range of issues — for example:

→ Privacy regulations (COPPA, CCPA, and state-level children's privacy laws) discourage companies from collecting or exposing children's information. Moreover, COPPA bars persistent identifiers for kids under 13.

→ Platforms like Google/YouTube and Meta apply strict age-gating and limit access to data on under-18s, which means advertisers can't get clean, direct parental data streams.

→ Some states (e.g., California, Connecticut) are extending heightened protections to teens under 17. This forces vendors to strip identifiers or suppress granular reporting, making it harder to tie panel observations to broader digital datasets without breaching privacy laws.

Children's Online Privacy Protection Act (COPPA)

The Children's Online Privacy Protection Act (COPPA), enacted in 1998 and substantially updated in 2013, remains the foundational regulatory framework affecting children's media measurement in the United States. COPPA restricts the collection, use, and disclosure of personal information from children under 13 without verifiable parental consent, imposing specific limitations that directly impact measurement approaches — these provisions include:

- Prohibition on persistent identifiers for tracking across sites/services.
- Restrictions on behavioral advertising and related measurement.
- Limitations on data collection without verifiable parental consent.
- Requirements for data minimization and purpose limitation.
- Significant penalties for non-compliance (up to $43,280 per violation).

It is essential to understand that COPPA restricts the tracking and collection of children's personal information — not household-level or adult audience measurement. Measuring adult co-viewers who watch children's content does not violate COPPA, as these adults are not subject to COPPA's protections. The law prohibits behavioral tracking of children under 13, not the measurement of parents and caregivers who view content alongside them.

Chapter 5. Privacy Considerations in the Children's Market

Many industry participants argue that YouTube's Made for Kids policies are more restrictive than COPPA requires. The FTC settlement targeted behavioral advertising directed at children, not the measurement of family viewing behaviors or adult co-viewers. Some stakeholders argue that certain policy implementations may be more restrictive than statutory requirements strictly mandate.

> ***One of the biggest challenges is the lack of PII, rightfully restricted under COPPA, but it also means we lose visibility not just into kids, but sometimes even their parents. That makes it incredibly hard to tell a full consumption story or prove outcomes. Advertisers want data. But in the kids' space, we're often left saying 'trust us,' and that's not sustainable.***
>
> *– Senior Digital Media Executive*

It is important to note a point of legal clarification here: measuring parents and adult co-viewers is COPPA-compliant. COPPA does not prohibit household-level measurement or the identification of adult viewers. The industry is not asking to track children; it is asking to measure family viewing. This distinction is both legally sound and commercially essential for the sustainability of children's media.

Similar protective frameworks have emerged globally, including the European Union's GDPR provisions for children (requiring explicit parental consent for data processing of children under 16) and the United Kingdom's Age Appropriate Design Code (requiring high privacy settings by default and prohibiting behavioral advertising to children under 18). California and other states are already extending protections to under-18 audiences, with proposed COPPA 2.0 legislation potentially raising federal thresholds to 16 or 17. If enacted, this would eliminate demographic measurement for teenagers 13-17 — one of the most commercially valuable youth audiences. These international standards reinforce the global consensus that children require enhanced digital privacy protection and remain very much in flux.

Measurement Implications

These protections create inherent tensions with traditional media measurement approaches. The very data points that enable audience measurement — persistent identifiers, behavioral tracking, demographic profiling — are precisely what these laws are designed to restrict when applied to children, but adult co-viewer measurement remains legally permissible and commercially necessary. This creates a fundamental structural challenge: the industry's need to understand and serve children's audiences conflicts with the legal and ethical imperative to protect them from the data collection required for such understanding.

The 2019 YouTube FTC settlement addressed violations of children's privacy and, on January 1st 2020, YouTube deactivated all MFK-related personalization globally, meaning ads served with MFK content could only target users based on context. These changes to YouTube's platform reduced revenue opportunities for children's content creators and limited the platform's ability to provide audience insights that could inform better content development or monetization of adjacent adult audiences.

Critically, the FTC settlement focused on protecting children from behavioral tracking, not on prohibiting measurement of adult co-viewers or family viewing patterns. The distinction between measuring family viewing and tracking children is not semantic. It is foundational to both legal compliance and commercial viability.

By extension, this development has also impacted the viability of YouTube as a sustainable revenue source for both kids creators and producers. Earnings for MFK creators on the platform have significantly decreased since the ruling, for large and small IP owners alike.

Understanding children as a protected, vulnerable audience fundamentally shapes how measurement should be approached. Rather than viewing regulations as obstacles to measurement, privacy rules should be seen as essential guardrails that require innovative, privacy-first measurement approaches. This means developing methodologies that can provide meaningful business insights while respecting the developmental needs and legal protections of young audiences. The challenge is not to circumvent these protections, but to innovate within them — creating measurement solutions that serve both the industry's need for audience understanding and society's commitment to protecting children's privacy and wellbeing.

The path forward requires clarity on what COPPA permits: household-level measurement and adult co-viewer identification are legally compliant and commercially necessary. The industry must advocate for measurement approaches that protect children while enabling the family-level insights essential to sustainable children's media. This is not about weakening privacy protections — it is about implementing them accurately, distinguishing between tracking children and measuring the families who watch with them.

Chapter 6. Implications — Creative and Commercial Challenges

The shortcomings of children's media measurement are not abstract; they have material implications for the economics and long-term sustainability of the sector. When investment decisions must be made without reliable signals about audience reach and engagement, studios, advertisers, and distributors may become more cautious in allocating resources to children's programming.

Children's content creators and media companies face major challenges. Current measurement approaches suffer from fundamental limitations that prevent accurate understanding of children's media consumption. Privacy regulations like COPPA, while essential for protecting young audiences, create systematic data discontinuities in measurement solutions and capabilities. Traditional panel-based measurement providers face challenges when reporting on viewing across thousands of channels, games and video clips, while limited panel sizes can lead to erratic reporting and systematic undercounting of co-viewing behaviors. Equally, children can be hard to find in bigger datasets - they tend not to be account holders, device purchasers or homeowners.

The fragmentation of consumption creates challenges across all measurement categories. No single measurement provider currently offers comprehensive visibility into children's cross-platform media consumption. Metric inconsistencies between platforms make unified measurement difficult if not impossible, while privacy compliance requirements systematically exclude children's content from programmatic advertising platforms.

These deficiencies affect every layer of the market — from content commissioning to advertising, distribution, and franchise management.

Creative Risk Aversion

Fragmented and unreliable metrics have contributed to increasing risk aversion among commissioners and studios. The inability to assess performance consistently across platforms has shifted investment away from original intellectual property (IP) toward established brands, sequels, and reboots. Educational or developmentally beneficial programming, which may deliver social value but not short-term engagement, is particularly disadvantaged when decisions rely narrowly on commercial metrics.

This has driven major media companies to scale back children's programming, despite recognizing its long-term audience value. This has resulted in a negative feedback loop: reduced investment narrows the range of quality options, leaving space for less regulated or lower-quality content to dominate.

Commercial Challenges

The commercial model underpinning children's media has contracted alongside measurement challenges. Revenue streams that once sustained robust content investment are under pressure, with measurement failures accelerating the decline.

Advertising, historically a cornerstone of children's media funding, has come under particular pressure, with industry participants noting:

- Reduced CPMs for children's content across digital platforms.
- Declining ad loads on children's linear television.
- Limited adoption of YouTube's Made for Kids content for advertising campaigns.
- The loss of compliant data from co-viewing adults on YouTube Kids.
- Shift toward alternative marketing approaches less dependent on direct media measurement.

The cumulative effect is structural: diminished revenues increase the risk of new content investment, which in turn reduces innovation and further weakens commercial returns.

Chapter 6. Implications — Creative and Commercial Challenges

The same commercial pressures have also impacted other funding models for children's content:

Content Licensing Pressure: Deal making in streaming is becoming increasingly disjointed, co-production models purvey, reducing this traditional revenue source.

Subscription Revenue Limitations: Children's-specific subscription services face high acquisition costs and churn challenges.

International Sales Compression: Global streamers' push for worldwide rights reducing territory-by-territory sales opportunities, and curtails brand activation on YouTube.

Consumer Products Headwinds: Retail challenges and increased competition in licensing, particularly challenged now with tariffs, create higher barriers for new IP.

Public Media Funding Decline: The contraction of public broadcasting support for children's programming has reduced a traditional revenue source that historically sustained educational and prosocial content development. This decline forces greater reliance on commercial models that require robust audience measurement for sustainability, creating additional pressure on already strained measurement systems.

Chapter 6. Implications — Creative and Commercial Challenges

Interconnected Impact

Creative risk aversion and commercial contraction reinforce one another in a negative feedback loop. Weak revenue streams deter bold creative bets, while formulaic content fails to excite audiences or attract advertisers, further accelerating revenue decline.

The absence of standardized, cross-platform metrics compounds this cycle. Commissioners cannot evaluate performance with confidence; agencies cannot optimize budgets; and franchise owners cannot measure cumulative impact. The result is strategic paralysis at precisely the moment when innovation and boldness are most needed.

Distribution Under Algorithmic Control

The distribution landscape for children's content has also undergone a significant structural shift from the scheduled programming blocks of linear television to the algorithm-driven environments of digital platforms, particularly YouTube. Where distribution was once primarily about leveraging an exclusive platform to fund content, then building out into FTA and broadcast to expand reach and support franchise opportunity, today's content must navigate complex ranking systems that determine visibility, promotion, and ultimately, success. This is coupled with dwindling commissioning budgets from established platforms, as well as full upfront fiscal responsibility sitting with the producer when developing for YouTube.

In some cases, algorithmic platform measurement systems often incentivize behaviors that don't align with quality or public service content creation for children:

- View count metrics reward clickbait thumbnails and titles over substantive content.
- Completion rate metrics can encourage artificially shortened content.
- Engagement metrics may reward contentious or emotionally manipulative content.
- Revenue metrics prioritize ad-friendly content over developmentally valuable content.

This fundamental gap in measurement creates a cycle where content optimization focuses on the metrics available rather than metrics that would truly measure success.

Franchise Management

The franchise business model represents the cornerstone of the children's media business, transforming creative content into long term, sustainable commercial enterprises that span multiple revenue streams and consumer touchpoints. What was once a relatively linear progression — from broadcast success to toy line to expanded merchandise — has evolved into a complex, multi-dimensional ecosystem requiring simultaneous management across platforms, formats, and commercial extensions.

In this ecosystem, traditional single-platform metrics often fail to capture the holistic performance of modern franchises. The most successful children's brands today, from *Peppa Pig* to *PAW Patrol, CoComelon* to *Bluey*, derive their value not from dominance in any single channel but from their cumulative presence across the media landscape. This cross-platform presence creates a measurement challenge that goes beyond content metrics to encompass brand awareness, affinity, purchase influence, and commercial performance. For rights holders, understanding these interconnected dimensions is crucial for strategic decision-making, yet increasingly difficult in a fragmented measurement landscape where the total impact of a property often exceeds the sum of its measurable parts.

Even successful, established children's franchises face measurable brand erosion without continuous content investment and audience engagement. Understanding when and how brand strength declines — and what content strategies effectively reverse this erosion — requires sophisticated longitudinal measurement that current systems struggle to provide. This challenge becomes particularly acute for properties that span multiple decades and need to continuously attract new young audiences.

Chapter 6. Implications — Creative and Commercial Challenges

Marketing and Advertising

Marketers trying to reach children's audiences face perhaps the most acute measurement challenges in the entire ecosystem. These organizations operate at the intersection of brand objectives, content platforms, regulatory frameworks, and audience behaviors — a position that requires comprehensive, accurate data to function effectively. Yet the fragmentation of children's media consumption has fundamentally undermined the measurement foundations upon which these agencies traditionally built their planning, buying, and optimization approaches.

Despite the promise of omnichannel video and seamless cross-platform multi-media storytelling, today's content companies and marketers find themselves working across a complex patchwork of platforms, formats, identities, and metrics. Each TV platform, Smart TV device environment, FAST aggregator, online video service, and social video platform exists in its own ecosystem, defined by distinct identity and measurement frameworks, buying mechanisms, targeting strategies and capabilities. As a result, advertisers looking to execute cross-platform TV and video campaigns need to juggle multiple touchpoints. A campaign might span a national TV network, multichannel TV services, Roku, YouTube, TikTok, and Samsung, but each platform speaks its own language and guards its data accordingly.

For marketers, the result is often a stitched-together campaign where audience overlaps are hard to see. While major agency groups have developed tools that can help clients work around these issues, there are no high-quality independent incrementality measurement tools covering the entire partner set. Randomized Controlled Trials (RCTs) are a high-confidence solution for determining incrementality across a single ad platform, product or tactic, but can take days or weeks to deliver real insights.

Where once a media plan could reliably reach the vast majority of children through a limited set of television channels with standardized metrics, today's landscape requires navigating an expanding universe of platforms, each with different audience measurement methodologies, targeting capabilities, and privacy restrictions. This fragmentation creates cascading challenges across the entire media planning and buying process, from audience definition and targeting to reach and frequency management, performance measurement, and optimization.

The increased complexity comes at a time when accountability pressures from clients have never been greater, creating structural accountability challenges: agencies are expected to deliver more precise targeting and measurement in an environment that makes such precision increasingly difficult. For marketers seeking to reach children's audiences ethically and effectively, the measurement gaps represent not just operational challenges but strategic limitations that impact campaign performance, budget allocation, and ultimately, return on investment.

Beyond measurement challenges, the children's media ecosystem faces systematic exclusion from standard advertising technology infrastructure. COPPA-compliant environments often cannot integrate with industry-standard ad tech platforms, programmatic buying systems, and performance measurement tools. This technological incompatibility means children's content is often excluded due to infrastructure incompatibilities rather than audience demand.

The Path Forward

Addressing these challenges requires solutions that provide consistent, comparable, and comprehensive measurement that acknowledges the unique characteristics of children's media consumption while respecting privacy requirements and regulations.

Reversing these dynamics requires investment in measurement that is consistent, cross-platform, and privacy-compliant — tools that reflect the unique consumption patterns of young audiences while enabling commercial sustainability. Without this, the cycle of creative risk aversion and revenue contraction will deepen, limiting innovation and undermining the diversity of content available to children.

Chapter 7. Recommendations — Actions and Initiatives

This paper has focused on assessing the measurement challenges currently facing the children's media market, at a time of tremendous structural change across the industry. Of course, many of the challenges identified in this study are not solely related to measurement but reflect the broader structural challenges facing the industry, as viewing becomes more widely distributed across a wider variety of platforms, services, devices and formats.

However, these challenges are undoubtedly amplified by current measurement limitations in the children's media space. Solving them requires a collaborative effort, delivering better technical measurement, clearer commercial narratives, and platform collaboration. We have outlined below three potential paths the industry should consider. If successful, we hope these recommendations can play a part in helping to move forward a more sustainable, dynamic and innovative kids' media ecosystem:

→ Establish a formal cross-industry Children's Media Measurement Council or Taskforce.

→ Engage major platforms as systemic partners.

→ Explore the scope for collaborative measurement initiatives that could support the children's media ecosystem.

1. Establish a Formal Cross-industry Children's Media Measurement Council or Taskforce

Children's media is undergoing a profound transformation. Once defined by appointment viewing of television channels, children's content is now spread across streaming platforms, social video, gaming, and user-generated ecosystems. Young audiences are highly engaged, but fragmented across environments with different rules, monetization models, and safety frameworks.

Despite the scale and importance of children's media consumption, there is no US-based trade body or coalition specifically dedicated to addressing the unique challenges of this sector. This absence is particularly visible in measurement: while adult media consumption is increasingly mapped through cross-platform solutions, children's data remains fragmented, incomplete, and in some cases inaccessible due to regulatory and privacy constraints.

The lack of a shared forum risks leaving children's media under-represented in policy debates, under-invested in by marketers, and under-measured by the industry's technical standards. No single company, whether studio, platform, or measurement vendor, can solve these challenges alone.

We propose to establish a new Children's Media Measurement Council or Taskforce to plug this gap, incorporating members of CIMM and the wider industry, with an inaugural meeting in Q2 2026 and a clear action plan for the rest of the year. A cross-industry Council would provide legitimacy and scale, enabling participants to pool expertise, articulate common needs, and influence technical standards and regulatory frameworks.

As well as making the case for children's media and encouraging responsible monetization strategies that balance commercial opportunity with child welfare, the new Council would work to support the development of measurement frameworks and approaches methodologies that capture children's media use across linear, streaming, social, and gaming, advocating for privacy-compliant approaches that satisfy regulators while enabling meaningful industry insights. The Council would work with the MRC and other bodies to establish technical guidelines specific to children's measurement and will explore new data partnerships and synthetic data techniques that preserve compliance while improving accuracy.

Establishing a cross-industry Children's Media Measurement Council or Taskforce is an opportunity to give the children's media sector a coherent voice, encouraging advertisers and platforms to support privacy-compliant and appropriate measurement tools that can support investment. The Council can also serve as a forum for supporting innovation at the intersection of business, technology, and regulation. By convening a coalition of studios, digital content leaders, agencies, marketers, platforms and measurement providers, the industry can collectively build the case for renewed investment in children's media, helping to secure its role as a vital, sustainable part of the entertainment and advertising ecosystem.

2. Engage Major Platforms as Systemic Partners

Video aggregators, gaming networks, and other platforms are a critical global distribution layer for kids' content, and many kids media companies seek greater systematic engagement to input into platform policies, monetization changes, and data guardrails. Creators, rights holders, and advertisers could productively engage with platforms to more effectively mitigate or manage platform risks:

- **Economic Disruption:** Policy changes that reduce creator revenue without formal industry consultation.
- **Strategic Misalignment:** Algorithmic and monetization shifts that occur without structured input from child-development experts or creators focused on quality and suitability.
- **Measurement Data Limitations:** Privacy-compliance restricts sharing data on under-13 audiences, but broader access to other audience metrics could benefit industry-wide planning, investment, and optimization.

The new Council would strive to work closely and collaboratively with the major platforms on a range of issues:

- **Policy Consultation:** Include children's media stakeholders in policy development that shapes content economics and visibility.
- **Measurement Collaboration:** Co-design COPPA-compliant, privacy-preserving signals and reporting with independent measurement providers to deliver decision-useful insights.
- **Creator Economy Support:** Explore revenue models that reward quality, suitability, and developmental value, above and beyond raw watch time.
- **Regulatory Coordination:** Engage regulators collaboratively to balance privacy with sustainable, transparent business intelligence.

3. Explore the Scope for Collaborative Measurement Initiatives that could Support the Children's Media Ecosystem

Effective measurement requires coordinated, cross-industry collaboration across platforms, publishers, advertisers, agencies, and independent vendors. The new Council should explore the potential for and feasibility of effective, privacy-compliant children's media measurement solutions that could meet the needs of industry stakeholders. For example, these solutions could include:

Establishing a Common Integrated Measurement Solution

Industry stakeholders could collaborate to fuse existing measurement tools and data sources into a single, hybrid framework. Such an integrated measurement solution would seek to bring together disparate measurement approaches — panel data, big data sets (ACR, set-top box, server logs), and content-level information — into an interim, best-available cross-platform overview of children's media consumption. It would not seek perfection, but rather provide the most credible and consistent view possible by blending complementary strengths:

- Panels supply depth, consent, and attitudinal granularity.
- Big data offers scale, coverage, and frequency.
- Platform data contributes contextual and content-level accuracy.

Potential problems solved:

- **Fragmentation**: Current solutions break down when analyzing small child cohorts across multiple platforms. A unified approach increases usable sample size.
- **Transaction confidence**: Advertisers and agencies can transact with greater confidence when working with a stable standard, even if imperfect.
- **Comparability**: Helps normalize metrics across TV, streaming, YouTube, gaming services, and other platforms, allowing children's media to be planned alongside adult audiences.

A common integrated measurement solution would likely require a governance framework (potentially via a neutral industry body) to ensure transparency, methodological disclosure, and oversight.

Building Support for Program-level Data Sharing

This initiative would seek to establish greater cooperation between streaming platforms and premium publishers to share program-level metadata and impression data. A preferred partnership program could be established where platforms agree to standardized data pass-backs under strict safeguards:

- Controlled access for accredited measurement providers and agencies.
- Anonymized, privacy-compliant data to avoid COPPA or GDPR violations.
- Alignment with brand safety and suitability taxonomies (e.g., IAB Tech Lab's Content Taxonomy).

Potential problems solved:

- **Opaque content distribution**: Advertisers currently lack visibility into where children's ads appear, complicating campaign planning and compliance.
- **Brand suitability**: Program-level transparency would help ensure ads align with age-appropriate content.
- **Campaign effectiveness**: Planners and researchers could better analyze which types of children's content drive attention and engagement.

This would help re-establish trust between buyers and sellers in an environment where opaque reporting undermines confidence.

Chapter 7. Recommendations — Actions and Initiatives

Developing Bespoke Kids Media Measurement Frameworks

Rather than holding children's media to adult-centric benchmarks, this initiative would develop a purpose-built measurement framework that reflects children's unique characteristics:

- Integration of privacy-by-design approaches that comply with COPPA and similar standards.
- Explicit modeling of co-viewing dynamics (e.g., parent + child households).
- Tailored metrics: "engagement intensity," "repetition factor," and "cross-household influence" may be more relevant than adult-oriented KPIs such as reach or frequency.
- Cohort-based segmentation (babies, preschoolers, kids, tweens, teens).

Potential problems solved:

- **Inappropriate benchmarks**: Current standards ignore the way children consume media differently (repeat viewing, short-form preferences, co-viewing).
- **Privacy conflicts**: A bespoke design acknowledges and integrates legal restrictions rather than attempting to retrofit adult standards.
- **Commercial clarity**: Studios, advertisers, and agencies gain decision-grade insights tailored to children's content, strengthening the business case for investment.

This framework could be developed collaboratively through the industry Council, with guidance from child development experts, privacy lawyers, and measurement vendors.

Developing a Synthetic Children's Population Dataset

Synthetic data techniques leveraging AI models can simulate populations of children and households based on statistical distributions drawn from census, survey, and panel inputs. Attributes such as age, household structure, device availability, and media behaviors can be generated and calibrated to match known distributions.

Applications could include:

- **Gap filling**: Where real data is unavailable (e.g., online video viewing for under-13s, gaming platforms), synthetic data provides a proxy.
- **Scenario modeling**: Test "what if" campaigns across TV, gaming, and social media.
- **Privacy preservation**: Enables research into sensitive populations without exposing any individual child's data.

Potential problems solved:

- **Regulatory blind spots**: YouTube's absence of demographic data under 13 and gaming's lack of standardized reporting can be partly filled with modeled simulations.
- **Cost and feasibility**: Obtaining granular, longitudinal child media data is expensive; synthetic approaches provide scalable alternatives.
- **Analytical flexibility**: Researchers can run experiments at scale without compromising real children's privacy.

A well-governed synthetic dataset, validated against real-world benchmarks, could become a shared industry resource, offering both practical planning tools and a safer path for innovation in children's measurement.

Future Areas for Exploration

Beyond these three major near-term initiatives, in the future the industry should consider exploring a range of opportunities for improvement, including:

- **Streaming:** Extend performance windows for kids' content; standardize co-viewing measurement; normalize completion and rewatch metrics across age cohorts.
- **YouTube:** Enable property-level aggregation of channel networks; enhance privacy-compliant demographic modeling; standardize kids' content categorization; support comparisons beyond views.
- **Gaming:** Define engagement metrics suited to interactive experiences; integrate with video measurement; develop privacy-compliant demographic modeling.
- **Short-form/Social:** Create age-appropriate engagement definitions; link short-form discovery to long-form consumption; measure family co-engagement.
- **Outcome-driven Content Measurement.** Move beyond "views" to quantify commercial impact and mission outcomes (e.g., toy sales, app installs, subscription starts, linear tune-in, learning objectives), enabling smarter greenlights and renewals.

Appendix — Stakeholder Case Studies and Contributions

Throughout the course of our research, we interviewed key stakeholders from across the kids' media ecosystem, and invited any relevant contributions for the study. Below are six inputs from companies working with kids' media measurement - either case studies, or structured research question responses.

Cricket Media

Overview: Cricket Media is a kids and family media company built for the digital era. For over 50 years, Cricket has created stories that spark curiosity, imagination, and connection. Following the acquisition of Sensical, Cricket now unites trusted magazines with streaming video, audio, and interactive experiences that help children explore their world safely and with wonder.

From print and video to podcasts and interactive play, Cricket designs experiences grounded in the science of child development that grow with kids, encouraging creativity, confidence, and critical thinking at every stage.

Cricket operates with a dual purpose: to delight kids with high-quality, age-appropriate content, and to support parents, educators, mentors, brands, and platforms in helping children explore their world safely and confidently, scaling impact through licensing, subscriptions, syndication, and strategic partnerships.

URL:	https://cricketmedia.com/
Response from:	Eric Berger, CEO

SENSICALSELECT YouTube Network (owned by Cricket Media)

- Tailored to focus on digital first, short-form creators.
- Curated to include well-known characters kids love, emerging trends, hidden gems.
- Powered by SENSICALMATCH — the industry's most sophisticated, data-driven, contextual targeting solution.
- Aligns product and brand messaging with safe, relevant content to drive incremental reach, reduce waste, and improve performance.
- Scope
    - 300+ metadata dimension.
    - 6M+ data points.
    - Average video completion rate (VCR) of 95%.

Case Study #1: Toy Promotion

Sensical partnered with a leading toy company and their agency to build momentum for a popular doll brand. The preschool campaign targeted content for girls ages 3-5 with a focus on encouraging imaginative play. SENSICALMATCHTM targeted nearly 7,000 contextually relevant content URLs aligned to themes such as fantasy, friendship, learning, and imaginative play.

The six-week campaign delivered an average 98% video completion rate (VCR) across CTV, desktop and mobile devices. Key results included:

- 47% ad recall, indicating strong memorability in a preschool audience.
- +18 point lift in brand affinity, driven by contextual alignment.
- 58% "very likely" to ask for the product, signaling high purchase intent.

Case Study #2: Theatrical Release

Sensical partnered with a leading studio and their agency to promote the release of an adventure-packed, kids and family movie. The campaign prioritized high-quality reach and attention during a narrow theatrical release window. Over three thousand URLs were activated for the campaign targeting content for kids 6-10.

SENSICALMATCHTM segments focused on key campaign themes and messages, includingadventure, bravery, perseverance, family and friendship, animals and nature. The three-week campaign delivered an average 97% video completion rate (VCR) across CTV, desktop and mobile devices.

Moonbug Entertainment

Overview: Moonbug creates global entertainment franchises. A franchise starts with the shows, worlds and characters and then comes to life in a number of ways: We distribute our shows on more than 150 video platforms globally including Netflix, Disney+, BBC iPlayer and YouTube Kids.

URL:	https://moonbug.com/
Response from:	Johanna Moscoso, Director of Audience Intelligence

Why does Kids Media Measurement Matter to Major Studios, Programmers and Kids Media Companies?

Kids media measurement matters because it's how we show this audience *counts*. Families, especially young children, are massive consumers of content, yet they're often left out of the bigger measurement conversation. If we can't prove their engagement, we can't make the case for investing in quality, educational, and brand-safe content. And that's a real risk, especially as public funding dries up and major publishers exit the space.

Beyond viewership numbers, what matters is understanding how content shapes family life today: how parents and kids experience it together, what role it plays in daily routines, and how that experience differs from past generations. When we can capture those dynamics, we start to see how this content drives decisions, influences spending, and builds loyalty. That kind of insight validates impact and gives us the foundation to keep creating and funding content families actually want and need. We're not just trying to justify one show or platform. We're trying to prove that this entire category deserves a seat at the table.

We want to understand how kids and families engage with content across platforms, how much exposure they have to non-COPPA-compliant environments, and ultimately, how we can elevate the standard for what they see. Without measurement, we're flying blind.

What Measurement and Monetization Challenges do You Grapple with?

One of the biggest challenges is the lack of PII, rightfully restricted under COPPA, but it also means we lose visibility not just into kids, but sometimes even their parents. That makes it incredibly hard to tell a full consumption story or prove outcomes. Advertisers want data. But in the kids' space, we're often left saying "trust us," and that's not sustainable.

On top of that, many of the industry's standard ad technologies just aren't built for COPPA environments. That means we're often excluded from performance buys or measurement studies, not because the value isn't there, but because the tech can't accommodate the privacy rules.

What's the Current State of Measurement? What is Available to You?

There's progress, but we still have a long way to go. Some partners have built large household panels that give us a directional view, sometimes even down to outcomes like sales lift, which is promising. But we need more flexibility, more scale, and more cooperation from the platforms that dominate kids' viewership, especially Google.

Right now, it feels like there are a few patches on the boat, but no one's fixing the whole thing. If the biggest platforms can build compliant solutions that protect kids *and* provide aggregated insights, the whole industry benefits.

What, if Anything, Could the Industry do to Address Some of these Challenges? What Would You like to See Happening?

This conversation is a great first step, but we need to go further. I'd love to see the formation of a dedicated coalition, one focused specifically on kids and family measurement. It should work in tandem with a policy group tackling the legislative side, because without access to the platforms and data we need, we're stuck.

There's a precedent here. Just like we've seen movements to support minority-owned media, we should rally around companies committed to making mission-driven, age-appropriate content for kids. That kind of alignment between values, business incentives, and policy could reshape the space for the better.

Nielsen

Overview: Nielsen is a global leader in audience measurement, data and analytics, shaping the future of media. Measuring behavior across all channels and platforms to discover what audiences love, we empower our clients with trusted intelligence that fuels action.

URL:	https://www.nielsen.com/
Response from:	Jonathan Wells, SVP Measurement Standards and Compliance

Kids audiences (which Nielsen defines as persons 2-18) are an important demographic cohort in relation to today's media consumption environment. As of April 2025, Nielsen's Gauge report shows that this demographic group represents 18.3% of the total Universe Estimate.

Children deliver significant viewership. For example, the Gauge report for April 2025 shows that kids demos comprise 3.4% share of linear viewing, but a much more significant 17.1% share of streaming consumption. Even more striking, kids have a 23.9% share of viewing to YouTube Main (indexing above the Universe estimate). Of course what this aggregate data doesn't reflect is the uniqueness of their consumption patterns; for example younger demos exhibit high volumes of repeat viewing.

From a measurement standpoint, quantifying kids' audience metrics presents a number of interesting challenges.

1. **Consent and Privacy**, especially on digital platforms. The most recognizable challenge stems from the rise in privacy regulations, many of which are specific to tracking users in the kids demographic cohort. As kids' media consumption moves more and more to on-line sources and streaming services, there are a number of specific legal and regulatory constraints that limit measurement companies' ability to use tracking technology to observe kids' media exposure across multiple platforms and screens. One of the most reliable solutions to this challenge is to secure explicit consent from parents to permit the direct measurement of children through more traditional panel-based approaches and metering solutions, but these remain expensive and dependent on panelist co-operation.
2. **Acknowledging and Accounting for Co-viewing**. While panel-based solutions (particularly those involving people meters and button pushing) are a solid approach to capturing co-viewing, these methods are known to underestimate co-viewing rates. This is particularly challenging in respect of kids' measurement where younger demographic groups in particular are likely to be watching content with a parent, or with others. Ensuring measurement solutions recognize this bias and have the necessary compensating controls is essential in understanding unique reach calculations.
3. **Establishing Measurement Scope**. The measurement challenge is much broader than just what's happening on the TV Glass. Connected Multiplatform viewing is the new normal! Kids are consuming much more than the "traditional" content delivered through linear and streaming services. Kids in particular are spending a lot of time watching User-generated content (UGC), particularly short-form video, and playing games. Nielsen data indicates that kids are spending over 2 hours a day on TikTok.
4. **Recognizing the Breadth of Behaviors in Kids Demos**. It is important to acknowledge that grouping exposures into a single "kids' demo bucket" can be a bit misleading. While measurement solutions attempt to deliver some delineation in kids' audience profile (in Nielsen's case, e.g persons 2-11, or persons 12-17), it is evident that there is a large difference between the media consumption behaviors of a 6 year old, versus that of a 11 year old, or a 12 year old vs a 17 year old).

All of these factors complicate the ability to easily understand what kids metrics actually reflect. Measurement companies who embrace the challenge of measuring kids' audiences need to be vigilant and transparent about addressing the errors and biases inherent in the raw measurement of these cohorts, while advertisers and publishers need to recognize the nuances any resulting metrics include when determining how to apply them to their own measurement use cases and outcomes.

Measuring kids is a great use case to illustrate why panels remain a key data source in any audience measurement service. The Nielsen Panel allows us to collect explicit parental consent to measure the viewing behaviors of individuals in the 2-17 age buckets. With this consent we can remain compliant with privacy regulation while still capturing the critical signals required to resolve identity signals for minors. These direct observations then provide a verifiable source of empirical data that are then input to the algorithms and models that produce persons-level audience estimations.

Paramount

Overview: Paramount is a major global media conglomerate that creates and distributes premium content across TV, film, and streaming, including content tailored for kids.

URL:	https://paramountglobalcontent.com/kids
Response from:	Pat Finnegan, SVP Multi-Platform Analytics

Why does Kids Media Measurement Matter to Major Studios, Programmers and Kids Media Companies?

The measurement matters because it tells us what is working. We want to make kids happy, so by understanding what is generating viewership and resonating with certain age groups we can then invest in the type of content they love. Accurate measurement is their voice, it's kids telling us whether a show needs to be picked up for another season or not.

With fragmentation of consumption where it is at this point, we need now, more than ever, an understanding of what is working and driving engagement. Effective measurement helps us understand what content can generate a wide reach and appeal but also what might be the more niche content that is resonating enough with its target audience that is causing a call to action — whether that be buying action figures or subscribing to our streaming service or tuning in to a premiere on linear. If we can gauge that this more niche content is energizing its fan base we can invest more in it with the hope that it could become a hit.

From a linear perspective we know that the reach is declining each year, so our goal is to win share of viewership with those still watching cable for each hour of the day — so very much a time spent viewing strategy. For our streaming business we are focused on broader reach hits and franchises that can drive subscriptions and then keep those kids within the platform with library content.

Precisify

Overview: Precisify (formerly known as Precise TV) empowers agencies & brands to achieve superior digital advertising outcomes by leveraging proprietary panels, AI models, intent signals and contextual data. As the only digital engine that makes $1 million work like $1.6 million Precisify is pioneering a new standard for digital advertising where every story finds its perfect audience.

URL:	https://www.precisify.com/
Response from:	Christian Dankl, Co-Founder and Co-CEO

Precise COPPA Compliant Measurement Solution — PACE (Precise Audience Content Evaluator).

The Precise TV Measurement solution uses probabilistic audience analysis (powered by proprietary media panel data and billions of data points), enhanced by AI and large language models. This measurement solution allows advertisers to understand if they are reaching the correct audiences in Gen Alpha and GenZ in a COPPA and GDPR-K compliant manner.

The Problem the Measurement Solution is Solving:

In the absence of behavioral, interest and audience targeting, demand side platforms can only use context for targeting. The vast majority of targeting in the under 13 years segment are using broad contextual packages or channel level targeting — both are primed for massive media wastage given these packages or channels are attracting often very broad audiences sometimes spanning over a decade in age. The same restrictions apply to post-campaign reports who are lacking under 13 years audience measurement. The product measures if you are reaching the correct audiences on YouTube, Mobile Gaming In-App environments and Influencer marketing.

How does PACE Work?

What sets PACE apart is Precise TV's proprietary audience panels, consisting of:

- Parents and kids aged 2-12.
- Parents and kids aged 13-17.

Combining the above panel data sets with billions of data points across YouTube and over 300,000 in-App environments, PACE applies advanced machine learning and AI modeling to predict audience demographics with a very high degree of accuracy.

"On average, PACE is reducing media wastage by 60% while helping brands target upwards of 90% of their intended demographics of under 17y" — Christian Dankl, Co-Founder & Co-CEO of Precise TV.

Case Study with Generation Media and their Client Panini

Generation Media was one of the first to adopt the recently launched PACE solution for YouTube and in-app advertising for its clients in industries spanning Entertainment, Toys & Games, Gaming and more.

"With PACE, we're able to ensure brands are reaching their core demographics with unprecedented precision, providing a new standard for transparency and accuracy in campaign effectiveness, and most importantly, helping make every media dollar count." — Luke Garden, Business Director at Generation Media.

The brand has already seen significant improvements in reaching its core audience of young trading card collectors.

"The improved targeting has directly impacted engagement and sales, ensuring that we reach the right kids and families who are most excited about our products." — Katie Gritt, UK Head of Marketing (Sport) at Panini.

Appendix — Stakeholder Case Studies and Contributions

Truthset

Overview: Truthset is an independent data science company that supercharges marketing data by increasing accuracy and eliminating waste, allowing marketers to fine tune their strategy and spend less budget to reach the right audience.

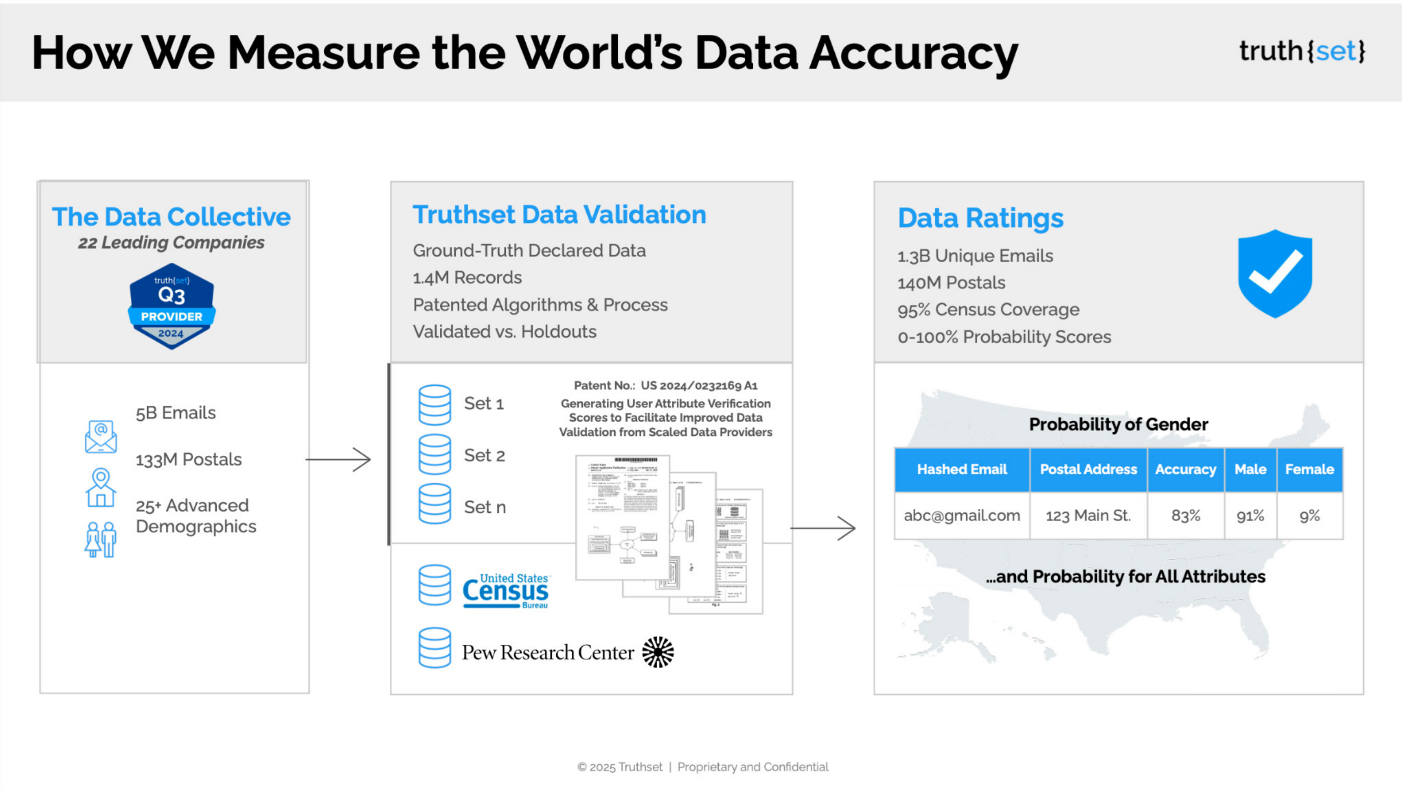
URL:	https://truthset.com/
Response from:	Kathryn Barnitt, Head of Data Science

Truthset has done work exploring the accuracy of third-party audience data regarding the **presence of children (PoC)** in households, using proprietary validation methodologies developed by Truthset. It highlights the key challenges in data reliability across the ad tech supply chain and offers actionable solutions for advertisers and data providers.

Data Validation Methodology

Truthset uses a patented algorithm to score the accuracy of HEM-keyed audience data by comparing it with declared, “ground-truth” validation sets. In total, Truthset analyzes 1.3 billion unique hashed email addresses (HEMs) and 140 million postal records to generate **Truthscores**, or **probability scores (0–100%)**, for over 25 demographic attributes, including PoC. These records are sourced from the **Truthset Data Collective**, consisting of 22 leading data providers.

Truthscores are then calculated for every HEM <> demographic or postal <> demographic combination. If a HEM receives a Truthscore of .92 for PoC, this means that particular HEM is 92% likely to have a child in its home.



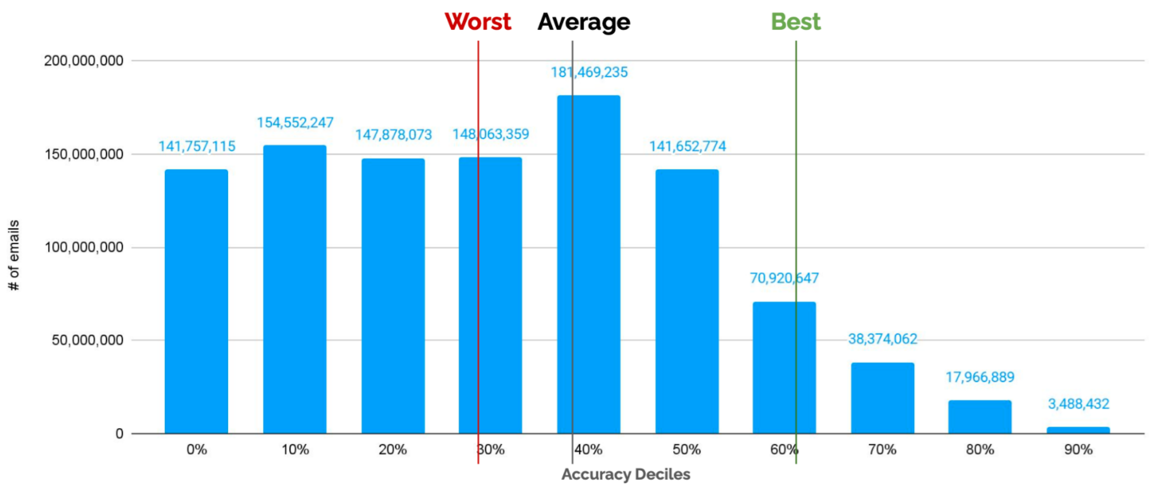
Appendix — Stakeholder Case Studies and Contributions

Findings on PoC Data Accuracy

- In Q1 2025, the **average accuracy score (Truthscore)** for "presence of children" was **41%**, measured across 1 billion HEMs.
- Avg. accuracy (avg. Truthscore) across providers varied dramatically, from **a low of 33% to a high of 67%,** with no consistent advantage based on provider size:
  - **"Jumbo" providers** (over 250M HEMs) averaged **41% avg. Truthscore**.
  - **Smaller providers** performed slightly better at **43% avg. Truthscore.**

Presence of Children - Overall Accuracy truth{set}

- In Q1'25, the average Truthscore for "presence of children" is **41%** across 1b unique HEMs
- Accuracy of PoC audiences ranges from **33%** to **67%** among leading data providers



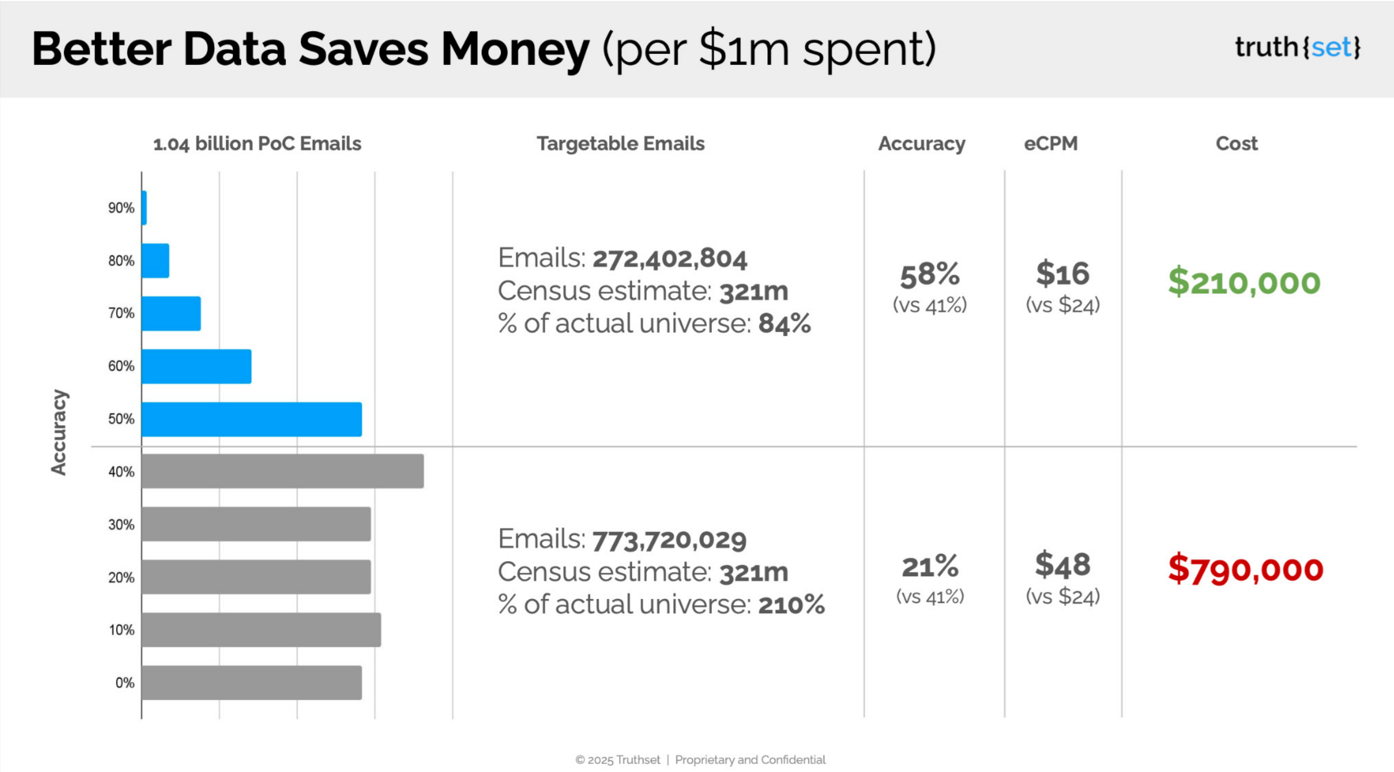
Data Accuracy Loss in the Supply Chain

These metrics were calculated for audience data at source – that is, they are demographic attributes directly keyed on HEMs. As data travels from source to activation in the ad tech Stack — through onboarding, device graphs, CDPs/DMPs, DSPs, and SSPs — **accuracy degrades significantly**. Error is further compounded and introduced by multiple matching and identity resolution layers.

Financial Impact of Inaccurate Data

Using inaccurate audience data for media buying is extremely wasteful. For example:

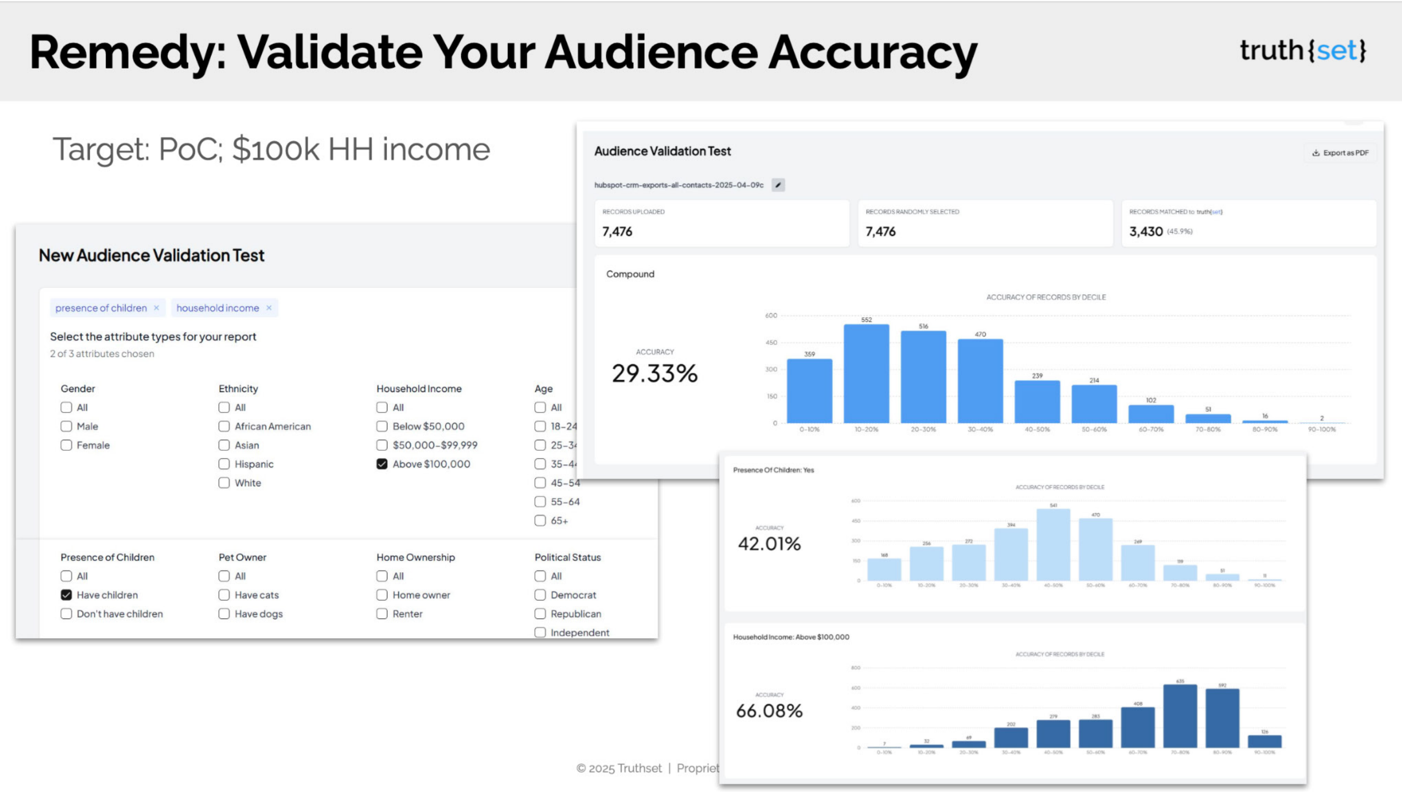
- At **41% accuracy**, a $1M campaign targeting individuals with children at home at a $10 CPM effectively wastes **$590,000**, with an **on-target CPM of $24.39**.
- In contrast, filtering out the least-accurate records (i.e., those with a Truthscore < .1) and using higher-accuracy data (avg. Truthscore of 58%) reduces eCPM to $16, cutting waste to **$210,000**.
- Conversely, using highly inaccurate data (i.e., those records with a Truthscore <.1, with an average Truthscore of 21%) results in an eCPM of **$48**, wasting **$790,000** of the same $1M spend.



Recommendations

To mitigate these issues, Truthset recommends:

1. **Validating audience data** prior to activation (through Truthset!).
2. Leveraging **multi-sourced, accuracy-rated people-ID audiences** curated from its Data Collective.
3. Targeting segments like PoC + $100K+ income households using **record-level validated data**, which delivers both **reach and accuracy**.



Conclusion

This presentation underscores the urgent need for the ad tech ecosystem to prioritize **data accuracy** — especially for sensitive segments like households with children. Through validation and smarter sourcing, advertisers can reduce waste, improve targeting efficiency, and ultimately drive better business outcomes.

Tubular Labs

Overview: Tubular Labs, the leader in global social video intelligence and measurement, provides a unified view of the passions and behaviors of audiences across YouTube, Instagram, Facebook, Twitch, and more. With the largest social video database covering more than 14 billion videos and 40 million creators, Tubular helps hundreds of household name brands, leading agencies, and the largest media properties grow their business and lead on social by anticipating trending content, new creators, and what's next in culture.

URL:	https://tubularlabs.com/
Response from:	Cara Medd, Customer Success

Why does Kids Media Measurement Matter to Major Studios, Programmers and Kids Media Companies?

Despite the limitations on ad and brand partnerships, measuring children's programming is still valuable because publishers and advertisers alike should know who's watching this content — and what they're watching next. Parents and caregivers are regularly tuning into children's content with the intended viewers. Understanding the larger graph of those interests can help tailor content programming and "also watches" sponsorships in ways that feel most relevant to the adult decision-maker.

Appendix — Stakeholder Case Studies and Contributions

What Makes Kids' Media Measurement Challenging?

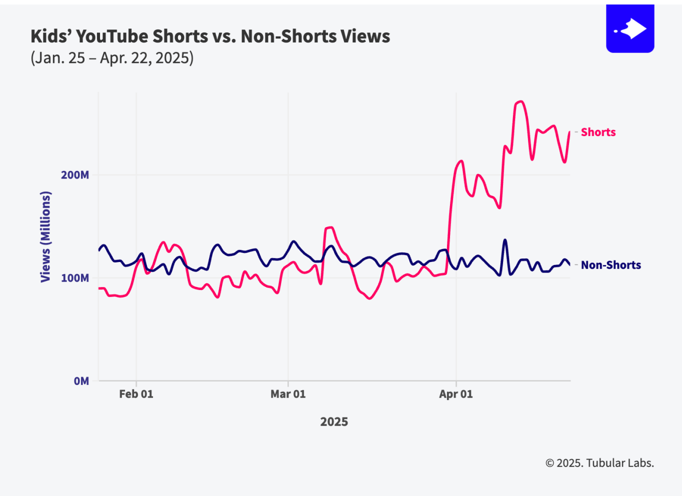
Kids media lacks the same brand opportunities and content triggers that work for older audiences, and the intended audience lacks the same sophistication as well. But metrics like watch-time and unique viewers can still provide valuable background on reach and engagement that reveal the power of kids content when up against other media options.

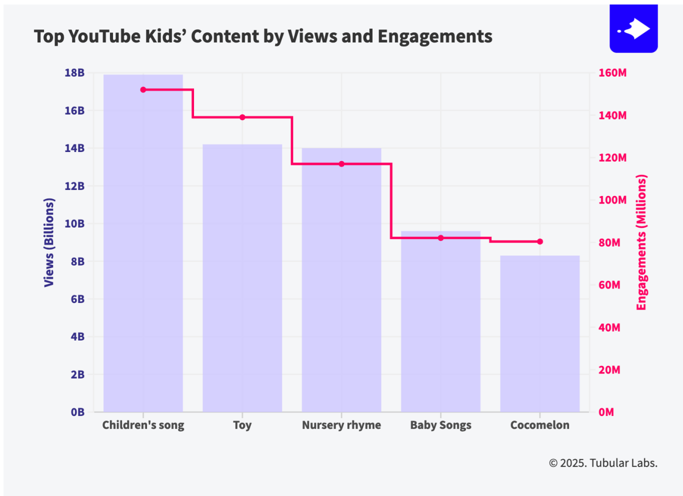
How is Tubular Helping Clients to Solve these Challenges?

TV-like metrics including watch-time and minutes watched help level the playing field to view kids' content creators as media companies with real reach. Tubular's extensive video intelligence dashboard also yields key insights around competitors, video duration, upload time and more that get creators and publishers to the heart of what's working and how they may want to adjust their content approach.

What, if Anything, could the Industry do to Address Some of these Challenges?

Develop a better understanding of social video beyond simple "views" that can lack nuance and fail to showcase the full scope of content reach — whether it's intended for children or not. Can also dig into specific video lengths and topics to understand how to get the best results with intended audiences.





Coalition for Innovative
Media Measurement