

International Kids TV Trends

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In the era of digital, children are faced with an ever increasing choice of content, screens and platforms. After some significant increases over the last five years, the average time that children spend watching TV seems to be stabilising, with continued increases in some countries balanced by losses in others. The competition between local children's channels and their international competitors is fiercer than ever, while in many countries generalist channels retain a strong influence on children's TV viewing.

Taking figures from the latest edition of the **Kids TV Report**, this exclusive whitepaper is brought to you by **Eurodata TV Worldwide**.

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Kids' TV Consumption

Kids' TV Consumption

How much do they watch?

Over the first half of 2013, **North American** kids are still among TV's biggest fans. Both **US** and **Canadian** children continue to enjoy the small screen, with children 2-11 in the States watching on average 3 hours 33 minutes a day.

In **Europe**, children's TV consumption reached 2 hours and 21 minutes per day on average, although the time kids spend in front of the TV varies considerably by country. With 3 hours and 54 minutes on average, **Portuguese** children are the biggest consumers of television among the 13 countries studied. **Italian** children 4-14 watched seven minutes extra in comparison with 2012, bringing their time spent in front of the small screen to 2 hours and 49 minutes per day. In **Russia**, like in **the UK**, the children's TV viewing has slightly decreased compared to last year. However, they still were in line with European averages with respectively 2 hours 19 minutes and 2 hours 17 minutes a day among children 4-15. Once again, **German** children bring up the rear in terms of European TV consumption, but even if they watched the least TV, with 1 hour and 33 minutes, their TV consumption increased by 2 minutes compared to 2012.

Australian children aged from 5 to 12 years old saw their daily viewing time increase by 3 minutes compared to 2012 to reach 1 hour 51 minutes over the first semester 2013.

These differences are of course influenced by cultural norms and how television viewing by children is perceived and monitored by parents. The choice of content available, school hours and the general pattern of children's days are other important factors reflected in these diverse daily viewing times.



North America



Europe



Australia
(Regional)

Methodology:

Daily Viewing Time per individual among children demo over the period January-June 2013
Europe: Czech Republic, France, Germany, Italy, Netherlands, Poland, Portugal, Russia, Spain, UK
North America: Canada (English), USA

Channel Hopping

Local vs International



Focusing on a panel of 18 major territories, **local children's channels** lead the market in 13 countries, showing the power of well established local media groups among young viewers. Meanwhile, **Disney Channel** is the main challenger of local children's channels, placing itself as the best performing international kids' channel in 9 of the countries studied. **Cartoon Network** is powerful in Asia, ranking as the best performing international kids' channel in three Asian countries out of four studied.

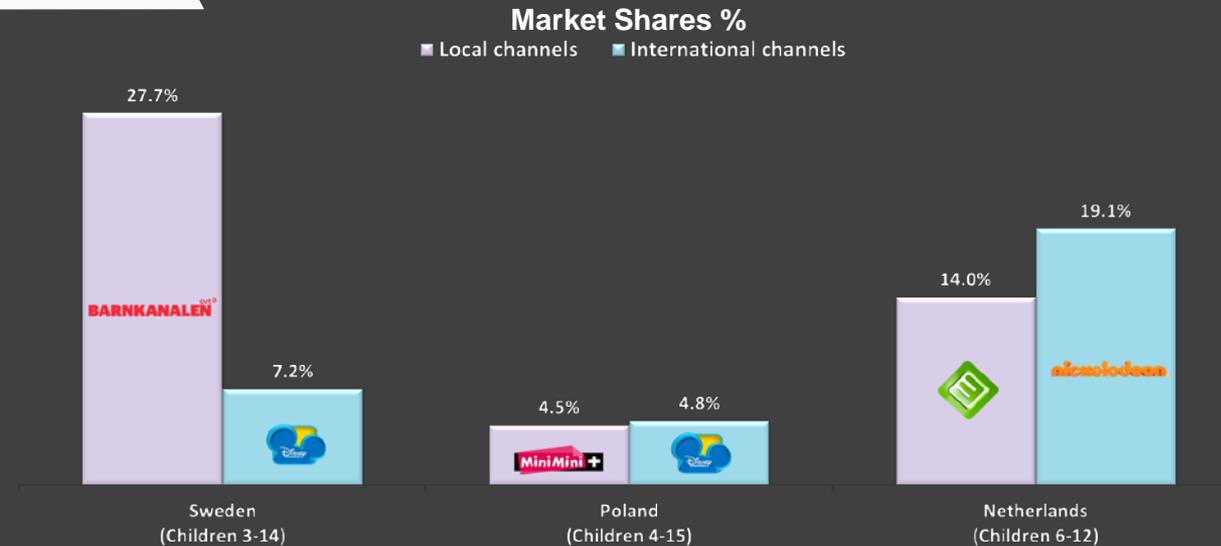
The dominance of local media brands can be in part explained by the fact that they often enjoy a privileged space on free DTT. However, the high proportion of local top channels is not necessarily a reflector of local content, as many have deals in place with major international producers, who are happy to use these platforms to reach the widest number of children.

Methodology:

- Countries studied: Jan-Jun 13 (Australia Regional, Canada English, Czech Republic, France, Germany, Italy, Netherlands, Poland, Portugal, Spain, United-Kingdom) Jul-Dec 12 (Denmark, Malaysia, Norway, Philippines, South Korea, Sweden, Taiwan)
- Measured channels only are taken into account

Channel Hopping

Country Zoom



In Sweden, the local kids' channel **SVT Barnkanalen** is very strong, with a 27.7% share on children 3-14, making it the best performing children's channel in this country. The second kids' net is **Disney Channel** with 7.2%, a gap of 20.5 points in terms of share. Local channels were also on top in Norway and Denmark, thanks to a winning mix of local productions and famous international shows. Local brands are likewise strong in English speaking countries (Canada / UK / Australia).

In some countries, there is fierce competition between local and international brands. For example, in Poland, it is **Disney Channel** that places itself ahead of **MiniMini+** with an extra 0.3 points in terms of share, a competition intensified by the fact that both channels are available on the same platform. In Italy, **Rai Yoyo** and **Boing** are neck and neck, with the former just ahead with 5.9% share on children 4-14 while **Boing** reached 5.4%. The latter channel, however, is something of a special case in Italy, being joint owned by the local Mediaset and the international Turner. Finally in the Netherlands, **Nickelodeon** was clearly ahead of the local channel **Nederland 3** with respectively a 19.1% and a 14% share on children.

Methodology:

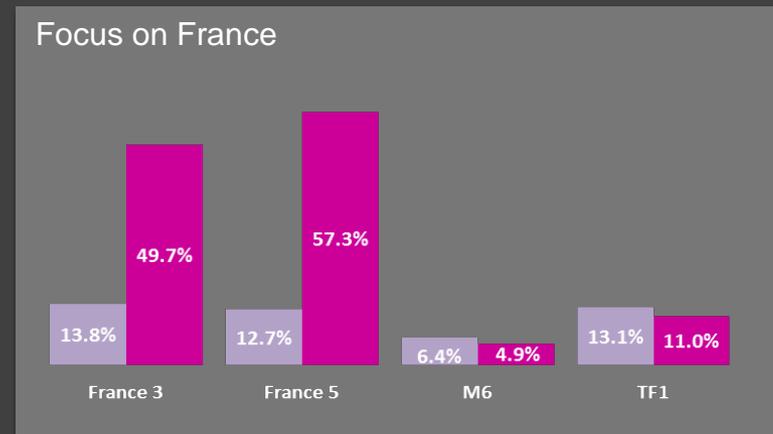
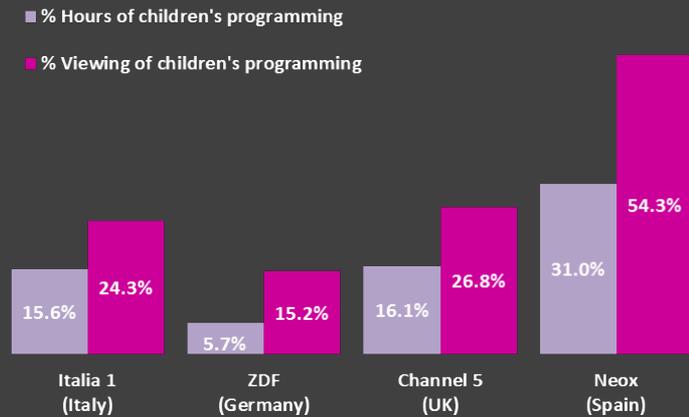
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The success of kids' programming on generalist channels

A comparison between the offer of children's programming on generalist channels and kids' consumption of it shows that many of these traditional blocks are still privileged destinations for kids' shows.

In the UK, thanks to its preschool morning block, **Milkshake**, Channel 5 manages to attract a lot of children to the channel. Kids' programming represents roughly 16% of the channel's schedule but almost 27% of kids viewing. This specific programming and the strategic choice of the morning slot participates in the success of the programs. Similar strategies have been developed by Italia 1 (Italy), ZDF (Germany), Neox (Spain) targeting specific demos with adapted slots.

For France, the landscape is quite different as only one children's channel is available for free. France TV thus offers a lot of kids' shows via generalist nets France 3 and France 5, which succeeded in attracting children to channels which normally have an audience profile focused towards older adults. For the main private channels (M6 and TF1) the consumption of kids programs is lower in comparison with the offer mainly because these channels also attract a lot of children in front of their family programs (entertainment, movies etc.), especially in access and prime time. This subsequently lowers the weight of kids' programming as part of children's total viewing.



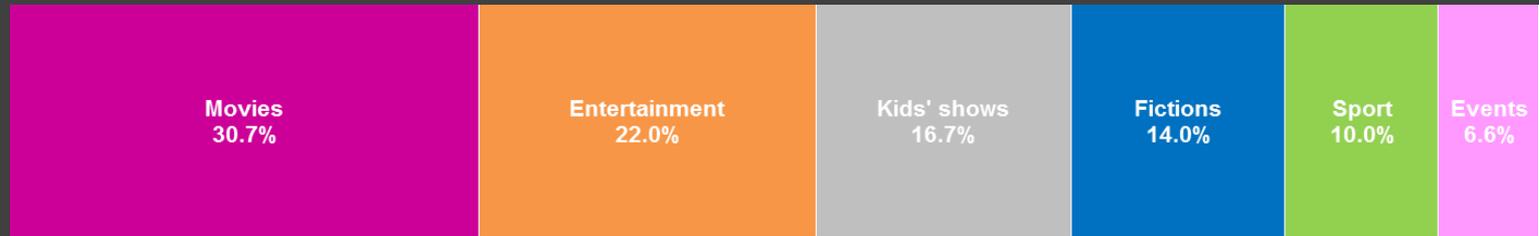


**Family viewing
still on top**

Family viewing still on top

Movies and entertainment lead the field

Best performing
genre in the
Top 10 all
programs



Taking a look at the 10 best performing programs (all genres combined) with children in 15 countries, movies and entertainment come out on top.

Movies take the lead with 30.7% of all programs in the top rankings. Globally, animated feature films make for huge hits on the small screen, making up 85% of the movies in the top 10s. Entertainment also found success with kids ahead of events, sport, fiction or even kids' shows.

The fact that movies and entertainment have a greater weight in the rankings than children's programs shows that watching together as a family is still the cornerstone of children's TV viewing. Even with the growing number of screens in our households, during primetime the different members of the family still come together to watch cross-generational TV, suggesting that the main screen in the living room has a long life ahead of it yet.

Events 6.6%
Sport 10.0%
Fictions 14.0%
Kids' shows 16.7%
Entertainment 22.0%
Movies 30.7%

Best performing genre in the Top 10 all programs

Taking a closer look at the top genre, movies, one of the most popular animated movies broadcast over the semester January-June 2013 was **Despicable Me**. Benefiting from the release of **Despicable Me 2** in the UK, ITV broadcast the first film in June 2013, the movie ranked as the seventh best performing program on children 4-15 over the semester, attracting 1 140 000 children 4-15 for a 43.8% share. In Australia, 7 Network used the same strategy and the movie placed itself as the second most watched program by children 5-12 over the semester. **Despicable Me** was a hit in French theatres and also on the small screen. The movie was the top program in terms of viewers 4-14 over the first half of 2013. The show reached 1.9 million children 4-14 and a 66.8% share (TF1).



Madagascar: Escape 2 Africa also met great success on TV, mainly in Eastern European countries. In the Czech Republic the movie ranked as the best performing program on children 4-14 broadcast during the first semester 2013 on Nova, it achieved a share of 67.2%. In Russia (CTC), Madagascar 2 was the third best performing program on children 4-15.

Children's taste for films on TV nonetheless varies significantly by country. In Russia, movies entirely dominated the top ten broadcasts among children, also taking a significant proportion of the ranking in Poland and the Czech Republic. In some countries, however, films were entirely absent from the top ten, as was the case in Canada and the Netherlands.

Events 6.6%
Sport 10.0%
Fictions 14.0%
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Entertainment 22.0%
Movies 30.7%



Best performing genre in the Top 10 all programs

Entertainment is the second most popular genre in the top ten rankings, taking 22.0% of the places. This presence was strengthened by major international brands, in particular talent quests and adventure reality series.

The Voice was one of the best performing programs in five out of the 15 countries studied. In France, the show broadcast on TF1 gathered a share of 56.9% among children 4-14 for its best performing airing. In the UK, **The Voice**, broadcast on BBC1, reached a 36% share on children 4-15 years old, placing itself as the fourth best performing show over the first semester of 2013. Children's love of the show has not been missed by broadcasters and has led to the creation of **The Voice Kids**. This featured among the top ten broadcasts of the semester among children in Germany (Sat.1) and the Netherlands (RTL4). In the latter the show was in fact the overall top program among kids over the period with a market share of 80.2% among 6-12s. Set for release in France, Spain, Belgium and Australia in the next few months, further international success seems assured.

Children also love watching real adventures on their screens, sharing victories and defeats with the contestants of **The Amazing Race** and **Survivor**. In Canada both shows were appreciated by young viewers and were in the top 10 of best performing programs among children placing themselves in sixth (CTV National) and 10th (Global Canada) position respectively. In France, **Survivor** (TF1) was the third best performing program with children 4-14 on the first semester of the year 2013. **The Amazing Race** (Channel 2) was also broadcast in Israel where entertainment performs particularly well. The show ranked as the number one program among children 4-11 with a share of 62.4%.





**What about
kids' programming?**

What about kids' programming?

Top genres conditioned by the offer

Animation has long formed the backbone of children's TV programming, and its continuing popularity among both broadcasters and viewers is borne out in an analysis of the best performing kids' programs by genre. With 62% of places among the top ten children's programs, cartoons still clearly provide the staple of children's TV diet.

This is partly due to the ease with which cartoons can be acquired as finished formats internationally, being at once less culturally specific and easier to dub than live action shows. Younger children find animation particularly appealing, with 86% of positions in the top rankings on the preschool target.

Older children, however, often have an appetite both for live action fiction and non-fiction dedicated especially to them, though the number of these titles appearing in the top rankings is often dictated by whether or not they are regularly scheduled on the most widely available children's channels.

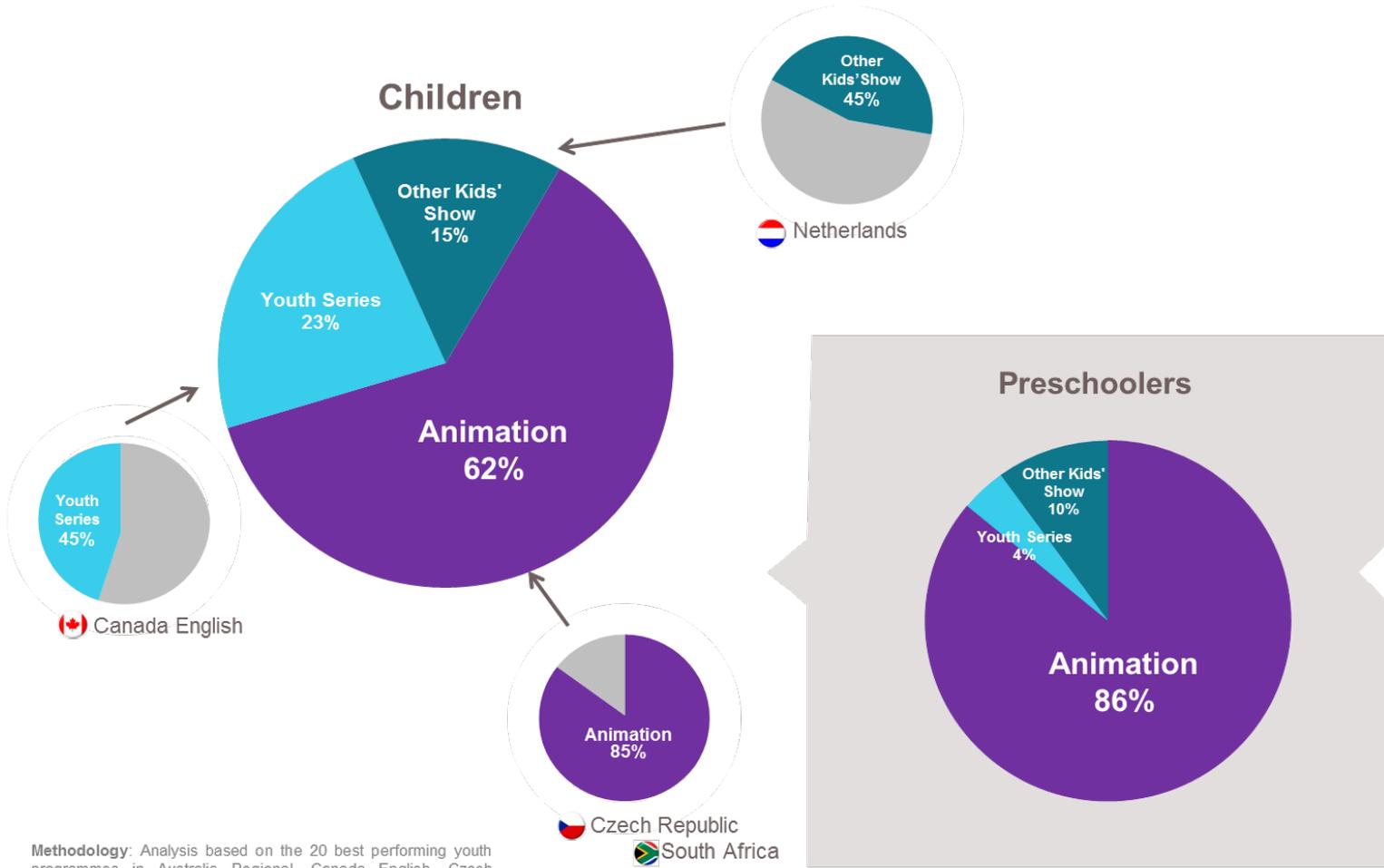
In the Czech Republic, for example, where relatively few viewers had access to dedicated children's channels, the best performing children's programs were all aired on the FTA generalist channel CT2. As this network mainly scheduled animation in its children's block, animation made up 85% of entries in the top ranking.

Meanwhile, in Canada, where the vast majority of children had access to a multichannel offer, the youth series of Disney and Nickelodeon helped the live action genre to take 45% of places in the top, mostly aired on YTV and Family.

In northern Europe, children's non-fiction is well established, often provided by the local pubcaster. This is the case in the Nordics and in the UK, but also in the Netherlands, where non-scripted formats accounted for 45% of the best performing children's programs, with news, science, cookery, game shows and kids' reality all on offer from Nederland 3.

What about kids' programming?

Top genres conditioned by the offer



Methodology: Analysis based on the 20 best performing youth programmes in Australia Regional, Canada English, Czech Republic, France, Germany, Italy, Israel, Netherlands, Poland, Portugal, Russia, South Africa, Spain, United Kingdom and United States (January – June 2013)

New and travelling hits

Lights, animation, action!

Boy skewing action animation has been a noticeable trend among the new titles expanding their influence in 2013.

Lego continued its success in this area with **Legends of Chima**, which ranked as the second best performing kids' show in Canada over the first half of 2013 (Teletoon Eng) and also among the top 20 children's shows in France among children 4-14 over the first half of 2013 (Gulli). Released in 2012, **Dragons: Riders of Berk** has been spreading its wings internationally over 2013, as the second best performing children's episode in the UK over the month of October 2013 (CBBC), while in November it was the number one show on Super RTL in Germany and the second on Boing in Italy. It was also among the best performing shows for Boing in Spain.

In November Mattel's new action animation **Max Steel** smashed into the top ranking for CITV in the UK. Its premiere episode on 11th November was easily the best performance for the channel over the month, with a 26.1% market share, among children 4-15, more than five times the channel average. In France, meanwhile, the show was launched in August, entering the national monthly top ranking directly in fourth place (Gulli). Another new hit for the channel in the same month was the recent Japanese anime **B-Daman Crossfire** which entered the top list in seventh place, an encouraging result as it starts its international roll out this autumn.



Max Steel



B-Daman Crossfire



Dragons: Riders of Berk



Legends of Chima

In live action youth series, broadcasters have been sticking to tried and tested formulae this year, with some successful launches for spin offs, as well as other titles making the most of established trends.

In the US, both Disney and Nickelodeon often find giving a new opportunity to existing sitcom characters is an efficient way to refresh the audience while retaining old fans. In this spirit, in 2013 Nickelodeon brought out **Sam and Cat**, featuring well-loved characters from previous hits ICarly and Victorious. The show was the number one kids' title in the US over the first half of 2013.

Meanwhile in the UK, the BBC was on the same tack. **The Dumping Ground**, the continuation of the Tracy Beaker story, and **Dani's Castle**, a spin off of Dani's House, were clearly the two best performing live action kids' series in the country



Power Rangers



Sam & Cat

over the first half of 2013 (both CBBC). **Dani's Castle** was also among the top performing programs in Australia, in third place in the ranking on children 5-12 (ABC3).

Power Rangers, meanwhile, is now in its 20th incarnation as **Power Rangers: Megaforce** and continues to draw in new viewers. The series ranked among the best performing children's episodes in both France (Gulli) and Italy (Boing) in November.

Telenovelas continue to draw viewers in Southern Europe, such as the recent Colombian import **Chica Vampiro**. Taking a lead from the supernatural teen fiction of recent years, the comedy follows a girl who has to decide at the age of 17 whether she wants to become a vampire like her parents or stay human. The titles entered the ranking of the top 20 performing episode in Italy over the month of November (Boing).



Chica Vampiro



Dani's Castle

New and travelling hits

Mixing learning and fun

Looking away from fiction, northern Europe continues to lead the way in terms of factual and entertainment kids' formats, with cookery and science two of the most popular themes.

The UK provides a wide variety of new factual and entertainment formats for kids which are generally warmly received. **Officially Amazing**, **Marrying Mum and Dad** and **Disaster Chefs** all entered directly into the top five over the first half of 2013 (all CBBC). While younger children's TV diet is generally more animation based, the second half of the year saw the launch of **Swashbuckle**, CBeebies first physical game show, which featured among the top ten best performing kids' episodes in the country over September on children 4-6.

In the Netherlands, among the long standing factual and entertainment hits a new launch marked itself out as the top kids' program of the first half of 2013: the **CupCakeCup** (Nederland 3). The competition, in which 9-12 year olds compete to make the best cup cakes, doubled the channel's average market share.

German children also enjoy a variety of non-fiction formats, although there are generally fewer launches in this genre than in the UK. Over the past few months several first time entries have been noted in the top rankings, with younger children aged 3-5 appreciating the cooking formats **Schmeckspllosion** and **Schmatzo – Der Koch-Kids-Club** (KiKA). Among older children 3-13, the new history show **Vollgas zurück** has also made a hit (Super RTL).

Meanwhile in France, a market generally almost totally dominated by animation, TF1 launched a short science format for its children's block, **TFouLab**, which entered the ranking of the top 25 best children's episodes in France in November.



Officially Amazing



CupCakeCup



TFouLab

Holiday Favourites

Original TV specials, a Christmas success story



The Gruffalo specials



Prep & Landing specials



Spike specials



Lost and Found short

To keep children in front of the TV and to immerse them in Christmas magic, channels often broadcast TV specials. While many children's TV series offer holiday episodes at this time of year, children are also able to enjoy original creations with characters making their debut on TV screens.

Prep and Landing, a typical Christmas special, was the most watched program in Portugal on the second semester of 2012. Broadcast on SIC, the program reached a 56.7% share and was watched by 289 200 children aged 4 to 14.

When this kind of holiday one-off makes a hit, a sequel is often not far behind. **The Gruffalo** and **The Gruffalo's Child** were broadcast in a lot of European countries in 2012. Aired on Christmas Eve in Germany **The Gruffalo**, (ZDF) gathered 225 900 children aged 3 to 13. In the UK, the special which aired on BBC1, attracted 302 800 children 4-15 on Christmas Day in 2012. **The Gruffalo's Child** reached a 62.2% share on 4-14 in Finland (YLE2) where it was the sixth best performing program (all genres combined) in July-December 2012. It also performed well in the UK with 602 100 viewers aged 4-15 (BBC1) outperforming the original **The Gruffalo**. The British animated film **Room on the Broom** premiered on Christmas 2012 and gathered more than 1.1 million children 4-15 on BBC1, raising hopes for another international success.

Holiday Favourites

Flagship properties boosted thanks to festive specials



The Smurfs : A Christmas Carol



Kung Fu Panda Holiday



Ice Age a Mammoth Christmas

For already well-loved TV and movie brands, the festive season is also a chance to boost their popularity with special episodes. The genre is not new, Disney's program *From all of us to all of you*, broadcast annually since 1958, is still a big hit in Nordic countries. In Sweden, the show, airing on Christmas Eve, was the best performing program on children 3-14 on the period July-December 2012 gathering an incredible average share of 99.3%. It also performed well in Denmark with a 72.7% share on children 3-14.

More recent TV specials from movies and series also reach high scores among children. *Kung Fu Panda Holiday* was broadcast on BBC1 for New Year's Eve and gathered 345 900 children aged 4-15 in the UK. In Portugal, *The Smurfs: A Christmas Carol*, broadcast on SIC, reached fourth place in the top ranking of the best performing programs (all genres combined) on children 4-14 over the period July-December 2012.

A lot of other famous brands have their own specials such as *Ice Age: A Mammoth Christmas*, *Shrek the Halls*, *Pink Panther: A Pink Christmas*. These episodes also help galvanize the audiences and the popularity of the properties uniting viewers in front of the TV for a special event.

Short and sweet... ...for the second screen

In recent months, series with short episode lengths (2-3 minutes) are becoming more and more evident among the top children's TV programmes throughout the world. Many of these titles have emerged from other media platforms, starting life as apps or webseries and afterwards finding a ready made audience on the TV screen. Popular examples in 2013 include **Barbie – Life in the Dreamhouse**, **Monster High** and **Angry Birds Toons**.

The hit game application by Rovio Entertainment found success on another screen this year. Launched in March 2013 as a short TV cartoon, it has featured among the top ranking monthly children's program rankings in France and Germany. A feature-length movie is being made for cinema release in 2016.

Angry Birds Toons

3rd Best episode in September 2013
France (Gulli) / Children 4-14



In 2013, we also saw hits in accessory and cross-platform series – brands are using alternative formats to extend the reach of their products. Such shorts can add an extra element to a brand, whether it involves pure fun or edutainment, as in the case of **Descubre con Tadeo** (see below) or **Jake and the Neverland Pirates'** spin offs **Playing With Skully** and **Mama Hook Knows Best**. In terms of entertainment, the telenovela **Violetta** keeps buzz going with **Violetta: Tu Sueño, Tu Música**, a home video singing competition in Spain. Both the series and the competition were among the 15 best performing children's episodes in Spain in September 2013.

Descubre con Tadeo

6th Best episode in September 2013
Spain (Boing) / Children 4-12



The Spanish cinema hit **Tadeo Jones** topped the Spanish box office for 5 weeks¹. Launched in July 2013, its edutainment shorts are present month after month in the Spanish top series rankings. A game on the PSVita is set for release this year.

- After a period of strong increases, **daily viewing times** among children fluctuated, with increases in some countries balanced by losses in others. North American children remain among TV's biggest fans.
- While **local children's channels** lead the kids' TV market in most territories, international challengers are providing ever increasing competition.
- Viewing **together as a family** remains important, and in most cases the very highest children's audiences were gathered by multi-generational shows, including entertainment and family movies.
- In terms of children's programming, **animation** remains in the lead when it comes to the top performing programming, however children's preferences are **strongly conditioned by the offer**. Live action and non-fiction are often consumed enthusiastically where available, especially by older kids.
- **Webseries and apps** made the crossover into successful TV formats, while a multiplatform presence becomes ever more important for TV brands.

About the Author

Eurodata TV Worldwide

Created by Médiamétrie, Eurodata TV Worldwide analyses and distributes programming and audience information, based on its partnership with the national institutes operating people meter systems throughout the world. Today, Eurodata TV Worldwide's database contains more than 5500 channels in more than 100 countries and provides exhaustive daily program information including: content, production, international distribution and the audience levels for targeted programs, all data emanating directly from the relevant authorized institute based in each country around the world. These data provide a range of services which help in the decision-making process of international professionals within the broadcasting world.

The Kids TV Report

Twice a year, the Kids TV Report brings together the latest key audiences and figures in international children's TV viewing. With five major European markets as standard and up to fifteen further territories available on request, the study includes: Daily viewing time by country; Market shares for channels offering children's programming; Top children's programs by country and channel among children and pre-schoolers; Mapping of volume and market share of kids' scheduling on generalist channels; Audiences by timeslot on children's channels; Audience profiles and most frequently scheduled shows and more....

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