

Is Kids' Preferred TV Content Changing?

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Is kids preferred TV content changing?

About this report

There's always been fascination with the tricks and tweaks that media moguls use to build and entrench their big kids' brands and properties.

In the 1980s, US cable channel TBS scheduled its shows to start at :05 and :35 past the hour so they'd stand out in the TV Guide. Disney has long shown an incredible ability to build a 'universe' around its properties. More recently, Netflix has perfected the enticement to binge view, thereby dominating the viewer's life, and the game Fortnite has managed to schedule its audience without ever needing a schedule.

Right now, in the middle of a transitional period for how audiences receive content, you have to wonder what the future of kids' TV will look like and how current networks and brands can prepare for it.

Historically, the way to get ahead was to create, curate and schedule highly-appropriate content. Would Ted Turner's 5-minute-shift hack work now? Probably not; in fact, there may no longer be hacks. Now, it's all about spend (Netflix) and scale (YouTube).

Will there ever be another brand that sustains across multiple generations, like Nickelodeon or Cartoon Network, or are modern entities destined to rise and fall as brief trends, like Loom Bands or Fidget Spinners?

The traditional media firms that used to be the glue holding generations together are now under threat from more generalist platforms, and even games like Minecraft and Fortnite.

Kids media, just like that for grown ups, has been going through a period of maturation, as it readies itself.

Whether the content kids engage with on TV is changing?

About Dubit

First a little bit about Dubit, focused solely on kids since our inception in 1999.

In 2015, we introduced our global media tracker - Dubit Trends - covering more than a dozen key media markets around the globe. In 2018, we added China, Mexico and the Nordic markets. Unless stated otherwise, the data referred to in this report is for 2-15 year olds.

The survey is conducted in April and October 2018, and interviews over 14,000 children aged 2-15 and their parents every year. The results are released over the subsequent months.

To say that kids' media is complex is an understatement. Knowing what kids do isn't enough; Dubit's research considers how, where and why kids choose and consume content. Most importantly, we explore what these behaviours mean for:

- Content creators developing and extending their narratives across platforms;
- Distributors finding and retaining audiences;
- Schedulers and programmers signposting their brands, and seeking to “own” particular moments in their audiences' lives; and
- Marketers creating purchase intent, when so much is free.



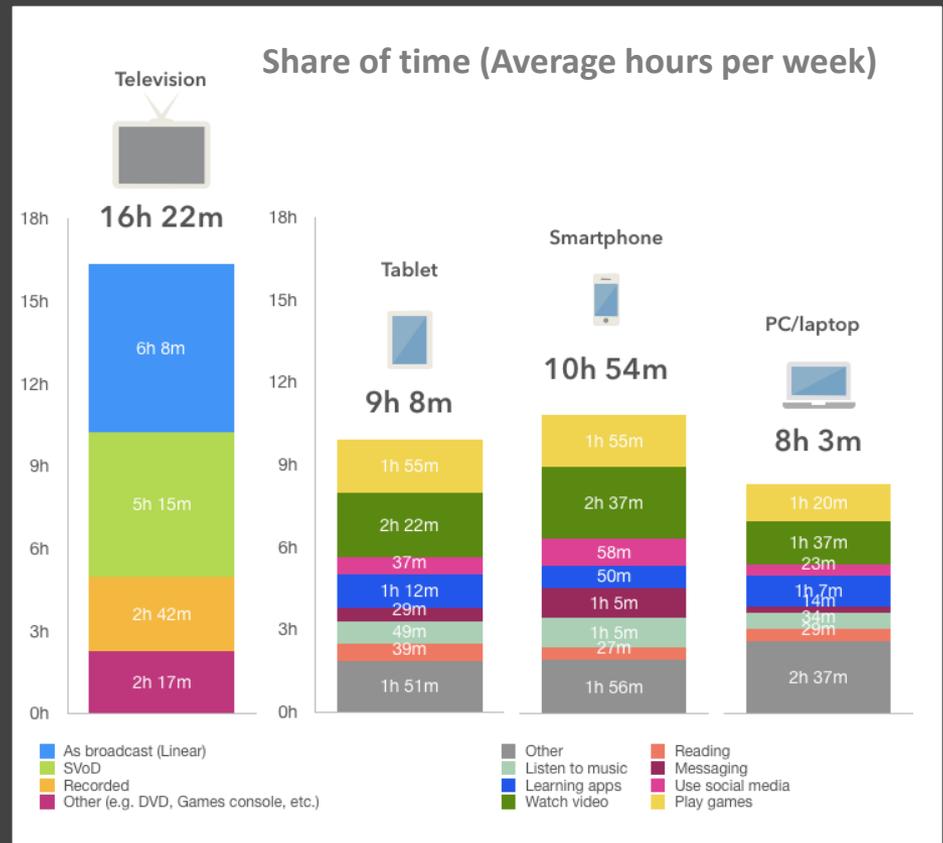
Device usage

Globally more time is spent using a television than other screens

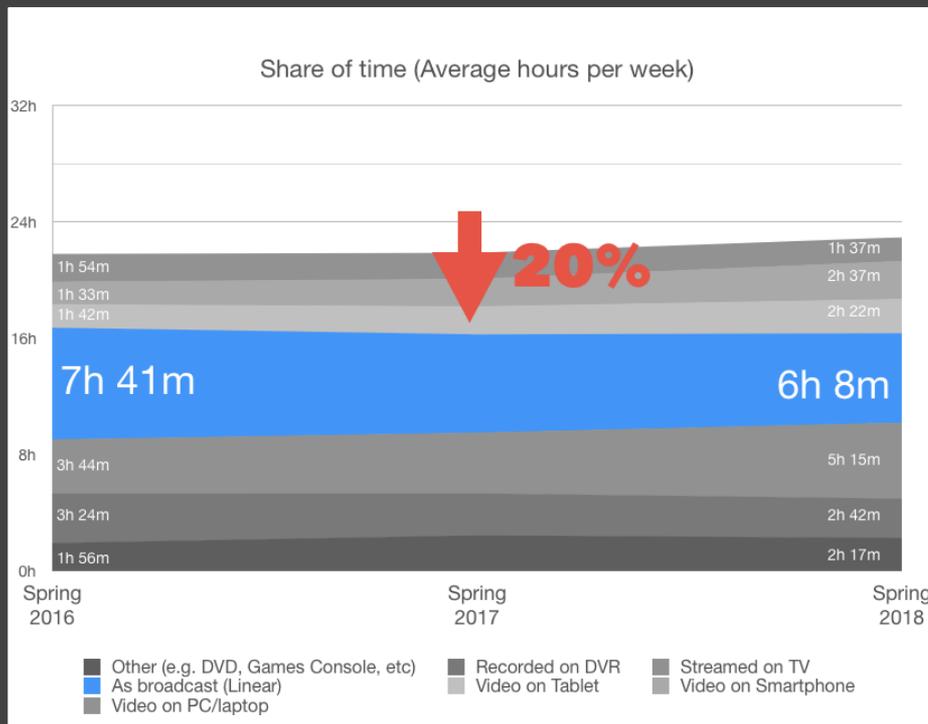
It's often said that television is in decline. Indeed, there are aspects for which that's true (to be covered in subsequent slides), but TV still accounts for nearly as much time as tablet and smartphone *combined*, every week.

Kids' time spent on tablets and smartphones is dominated by playing app games and watching video. As they get older, smartphone use shifts increasingly to social and messaging.

On average, 8-10 year olds spend an average of 2 hours 8 minutes, and 11-15 year olds spend 4 hours 46 minutes, with social networks and messaging services.



The decline of kids' linear TV...



Globally, since the Spring 2016 Trends survey, *linear television's* share of time has fallen by a fifth.

The biggest decline in linear viewing is among 2-4 year olds, an audience that goes largely un-measured by television ratings services. Audience measurement begins at different ages in different countries - in the UK it starts at age 4. Amongst these pre-schoolers there has been a 25% drop in the time spent watching linear TV. Given that these young consumers of content are not developing linear viewing habits, the question is, will they ever?

In our latest data, 8-10 year olds are the biggest consumers of linear television, but with a move away from dedicated children's channels in favour of more generalist channels.

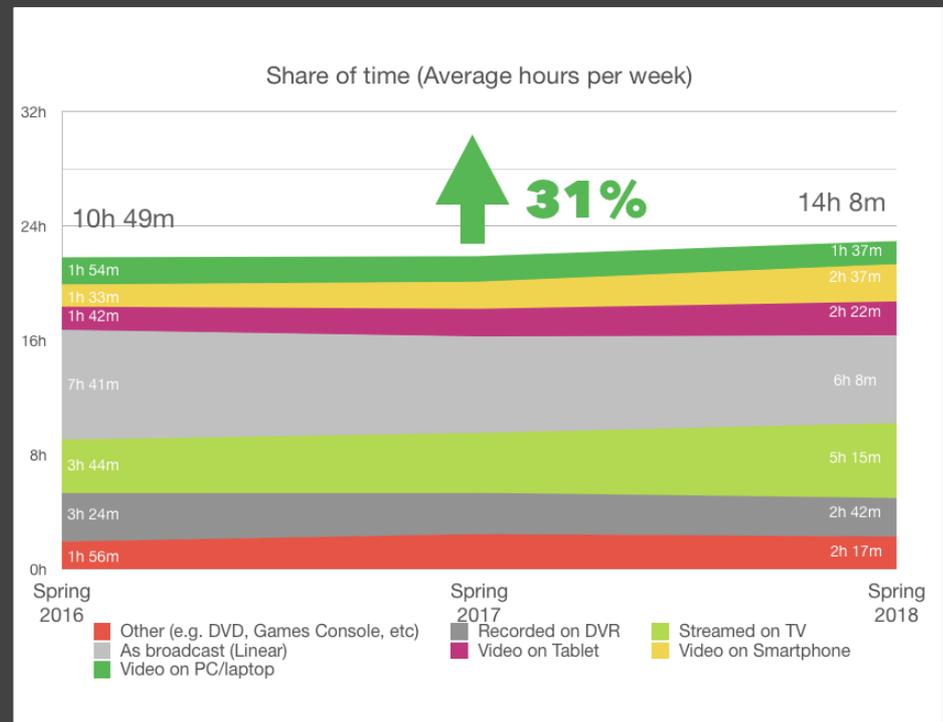
...but total video is growing

Despite a 20% decline in linear viewing, kids are actually watching *more video in total*. This has been driven by the rapidly accelerating growth of streaming across screens. Because kids have more access points for video than ever before (i.e. smart TVs, streaming devices, games consoles, etc.), they can get the content they want, when they want it, on whatever screen they choose - but they prefer the television.

In Spring 2016, kids spent on average 10 hours 49 minutes per week streaming video. Two years later that has increased to an average of 14 hours and 8 minutes per week (up 31%).

37% of time spent streaming video is on a television.

This means the average time spent watching video in total has increased by 29 minutes per week since Spring 2016 to 22 hours and 21 minutes – that’s over the 3 hours per day on average.



Video and games are the most common activities on tablet and smartphone



A greater *proportion* of kids use game-play apps on tablets and smartphones, but the greatest amount of *time* goes to watching video on mobile connected screens (see slide 4).

The type of video they watch on mobile screens is not the same as what they watch on TV, though. Most TV video formats are exactly what you'd expect - entertainment, dramas, comedy, animation, factual, etc.

On tablet and smartphone, more children watch unboxing, video related to games they currently play, celebrities and YouTubers, and how-to/instructional videos. On smartphone, short-form video dominates with UGC, fails, trailers and clips being watched the most.

Kids are on all devices across the week

Across ages, globally, watching television is still very much a daily habit whilst use of other devices is more sporadic during the week. However, as smartphones age-down they are becoming more of a daily habit.

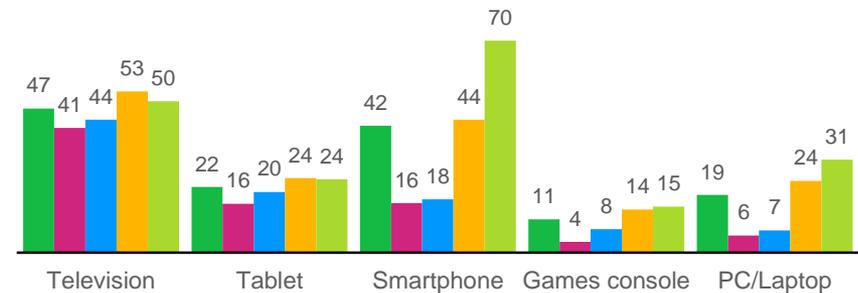
Smartphone activities differ from what children do on tablets. Much smartphone time goes to playing app games and watching videos, followed by use of messaging services like WhatsApp and social Networks like Snapchat and Instagram.

Content makers need to consider how video will be seen; growing smartphone viewing requires repurposing content for the best small-screen experience.

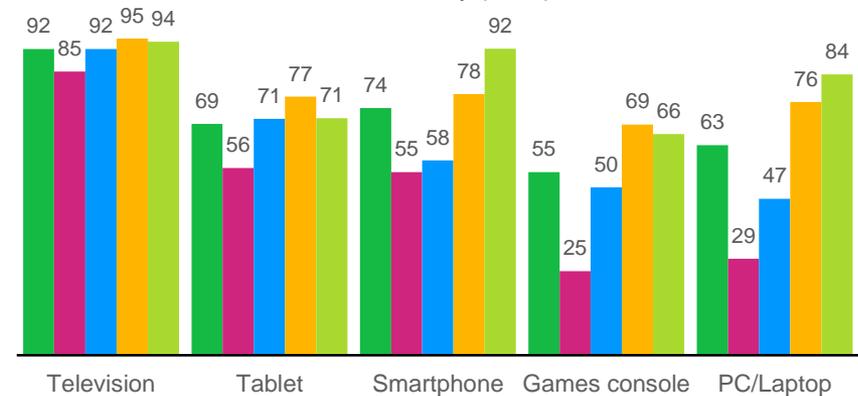
In use across the week, the television is still the 'king of devices' (just about), but many kids are as likely to be using a tablet or smartphone for entertainment, or even a games console.

Frequency of use

Use daily (in %)



Use weekly (in %)



■ Total ■ 2-4 ■ 5-7 ■ 8-10 ■ 11-15

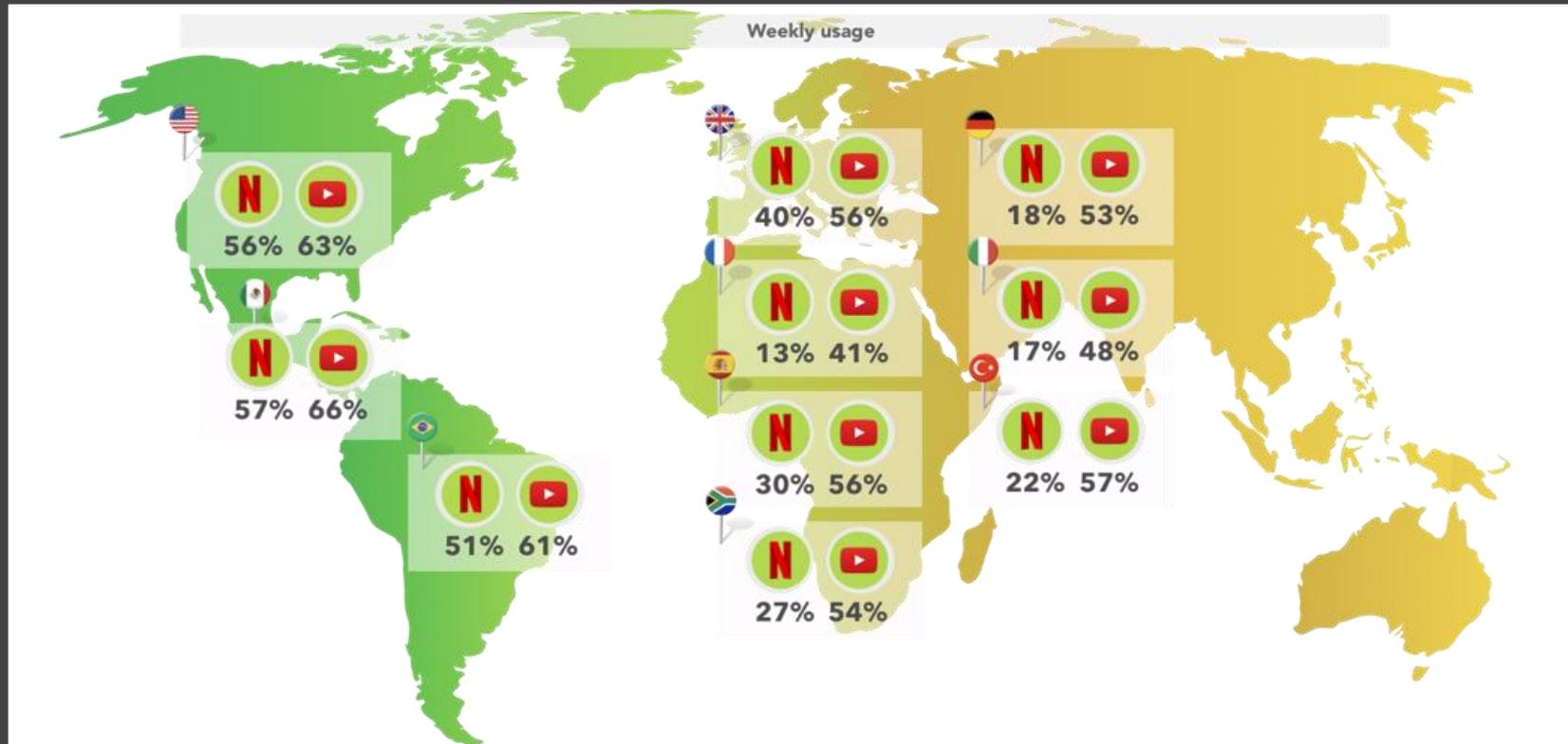


**Video platform
usage**

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YouTube is everywhere, but Netflix dominates SVoD



Netflix has commissioned and acquired a large library of kids content. In English speaking markets it is the dominant SVoD player, generally ranking second in terms of weekly use behind YouTube. In non-English speaking areas, it's somewhat less used by kids. Often, this is due to a lack of locally-commissioned content. Dubbing something from English into a local language is no substitute to something that originates in a country with strong social and cultural values.

Netflix and YouTube are now so far ahead of legacy media brands and channels; with their massive content libraries and, in the case of Netflix, budgets. They have become the dominant players for video on tablet and smartphone.

Netflix announced just recently plans to borrow another \$2bn to fund original content. It's going to be hard for broadcasters to lure kids from Netflix to their own platforms.

Despite having access to massive amounts of content everywhere and anytime, children still complain they can't readily find new things they love. They (and their parents) want content curators, and this is where broadcasters have an advantage. They are skilled at curating and promoting scheduled.

If Netflix showcased its children's content in a free and curated unique app for under-13s, it would be a huge concern for broadcasters.

With fewer TVs in households, children are co-viewing shows with parents. This has the effect of 'aging down' generalist channels.

Broadcasters need a new content strategy to keep kids in the driving seat on the big screen

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DirecTV Launches Kids App

Offers 100s of Movies and Shows Appropriate For Younger Viewers

Sky partners with Common Sense Media to bring peace of mind to parents

Virgin Media has announced it is launching a brand new Virgin TV app just for kids.

Providing a fun, easy-to-use and safe environment for some of Virgin TV's youngest users with no ads and no in-app purchases, the app lets kids enjoy the widest range of cartoons and TV shows alongside fun games and picture books all in one place. The app will be available for free to customers on a Fun bundle or above.



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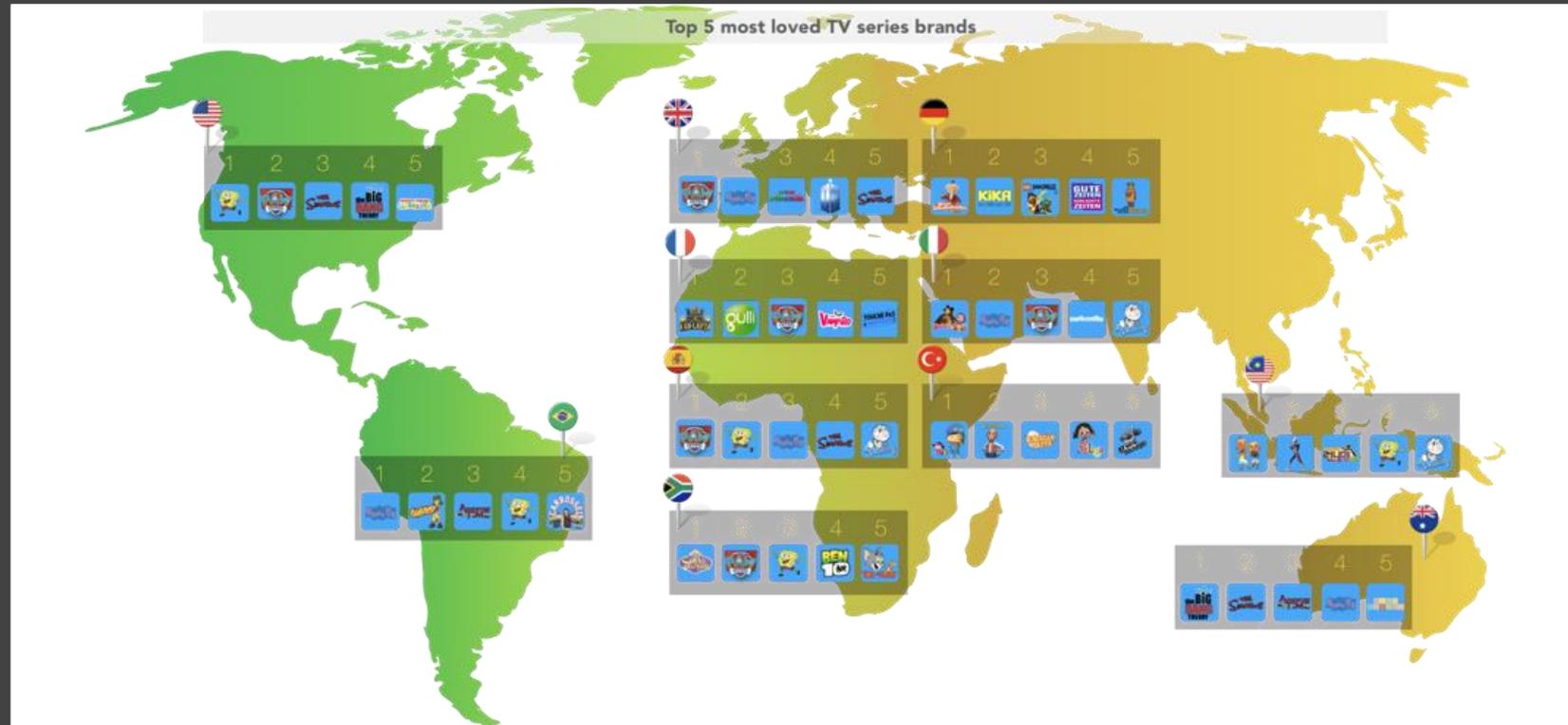
Disney Set to Launch Direct-to-Consumer Services

Acquires majority ownership of BAMTech

Jon Lafayette - Aug 8, 2017



**Content
consumption**

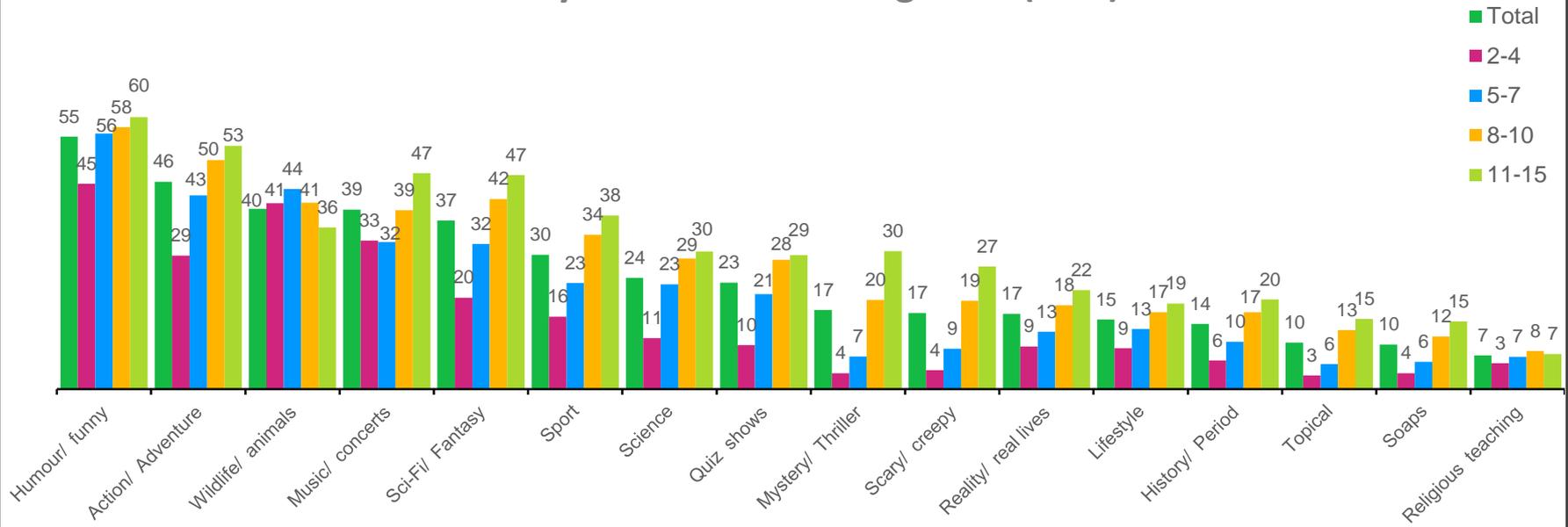


Pre-school brands still dominate lists of the most popular shows/series. At older ages, *SpongeBob SquarePants*, *Scooby Doo* and *The Amazing World of Gumball* still lead the way.

In many countries, heritage kids' series retain their popularity year after year. *Sending Mit Der Maus* (Germany), *The Sandman* (Germany), *Upin and Ipin* (Malaysia) and *Pepee* (Turkey) still capture big audiences.

Until now, linear TV had been key to these brands' dominance. Now, series originating first on Netflix (e.g. *True and the Rainbow Kingdom*, *Trolls*, *Boss Baby* and *Stranger Things*) and YouTube channels like *WildBrain* and *Little Baby Bum*, (which purchased recently by Moonbug for an estimated US\$7.8m-11.1m) are capturing big audiences.

Likability of entertainment genres (in %)



Across all ages, “funny” ranks as the most liked genre. Action/adventure is second most popular (driven by 8-15 year olds). Kids of all ages love animals and wildlife – at the younger end this is likely to be can be YouTube videos of kittens playing, while older kids watch content like Shark Week on Discovery.

Music covers a host of content types, from nursery rhymes and sing-a-longs at a young age to music videos and concerts for teens. Amongst pre-teens and teens, sci-fi/fantasy and sport come to the fore, and teens move into mystery/thriller and scary/creepy stuff.

As kids get older, they develop personal passions and interests, and this is reflected in their preferred entertainment genres, which begin to diversify.

The fragmentation of humour

As previously stated, humour – slapstick, character and sitcom, or really anything that makes audiences laugh - is kids' most liked genre. Content creators know this, and have always included funny elements in their productions, even shows that aren't purely comedy. Evergreen series like *Scooby Doo* mix genres.

Now, we have evidence that humour has become even more fragmented. Newer approaches embrace farce, parody, screwball and highbrow. Each appeals to a specific audience sector. Over the years, Cartoon Network has built its brand and a loyal audience around 'random humour'.

Even popular games include humorous elements. Fortnite users can purchase and use dances like 'Take the L' and 'Orange Justice' (the latter based on a video of kid dancing that was uploaded to YouTube). Some of these may make adults cringe, but they get kids laughing and talking about the game away from the screen.



Slapstick



Character



Sit-com



Farcical



Screwball



Spoof



Highbrow

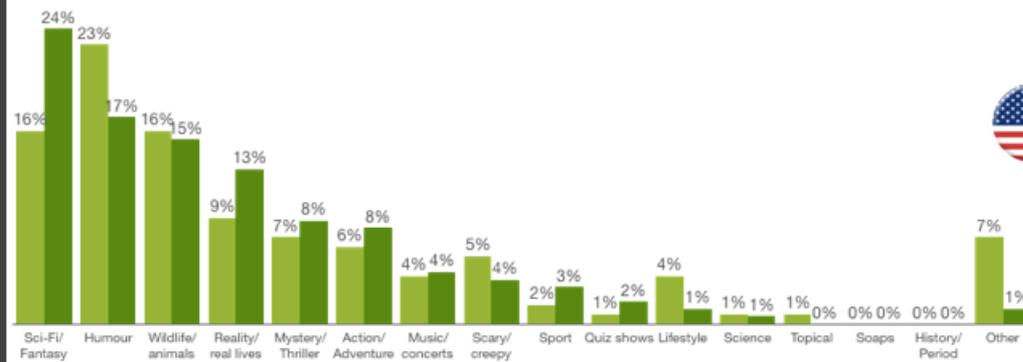
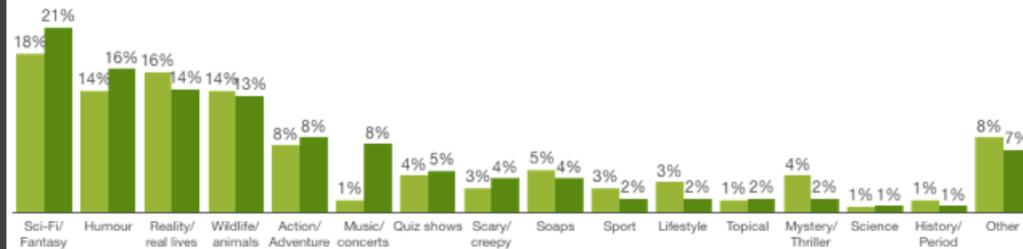


From Fortnite

Engagement with genres differs from what they say they like

Engagement with entertainment genres

Spring 2015 Spring 2018



In every Trends study, we look for brands and content kids love, by asking them to name their three favourite TV shows of the moment (unprompted). Each show is categorised by its primary genre. Here, we chart the US and UK results, comparing data from our very first Trends study in April 2015 with the latest results (April 2018).

What children say they like and what they actually like aren't necessarily the same. For example, 'sci-fi/fantasy' (everything from fairies and elves to superheroes and the paranormal) is the fifth most-liked genre, but comes out on top in actual usage and has shown dramatic growth in engagement over the last three years in the US.

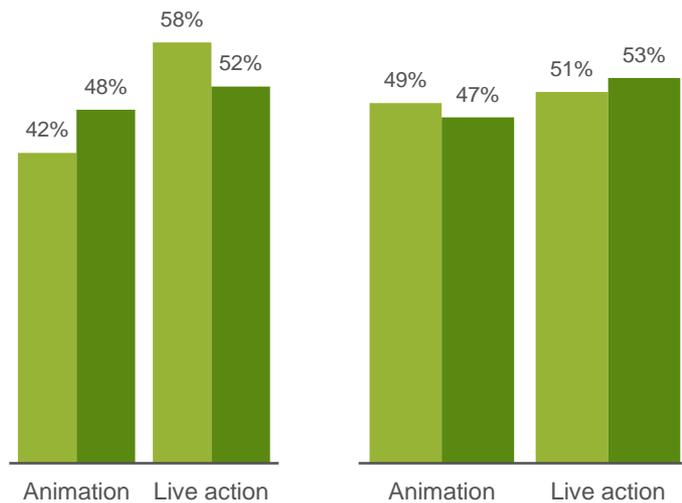
'Reality/real lives' (e.g., *Love Island*, *Survivor* and *I'm a Celebrity*), too, performs better in practice than in theory. The genre ranks eleventh in likability, but third in the UK and fourth in the US among specific favourites.

Many shows that define kids' preferred content genres are found on generalist channels and services.

Engagement with video formats



■ Spring 2015
■ Spring 2018



Asked to name their favourite shows, kids' lists are weighted toward animation. The reality is quite different. Amongst pre-schoolers, animation is dominant but by the pre-teen years, there's a clear, growing preference for live action.

Data analysis for the shows/series they've engaged with reveals differences between young audiences in the UK and US.

UK kids are engaging more with live-action series than with animation. Strong public service brands for children may play a part in this with CBeebies, CBBC and CITV offering breadth and depth in their output. Series about the natural world, arts and crafts, dramas, "how-to's" (cooking or make-and-do) are often live action.

The increased score for animation is likely driven by blockbuster pre-school cartoons like *PAW Patrol*, *PJ Masks* and the ever-present *Peppa Pig*.

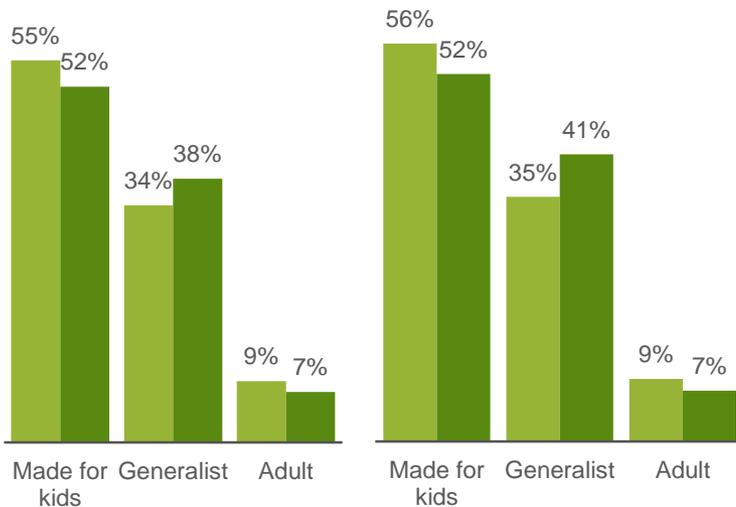
In the US, the gap between animation and live action is relatively small, but we have seen an increase in engagement with live action.

Kids still watch more shows/series made specifically for their age group

Made for kids versus generalist content



■ Spring 2015
■ Spring 2018

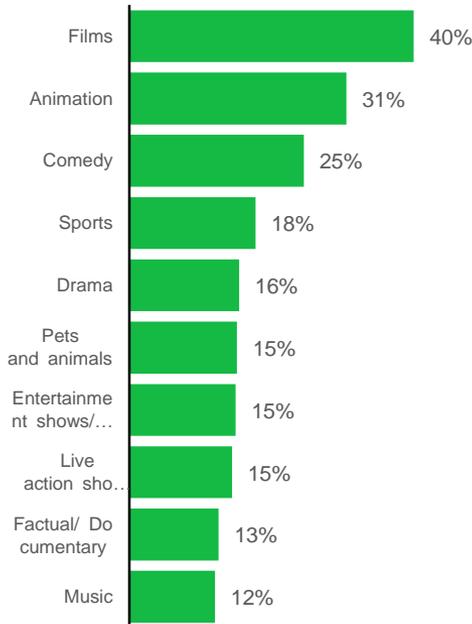


Compared to three years ago, the proportion of generalist shows with which kids engage has increased, matched with a decline in the proportion that are made specifically for kids.

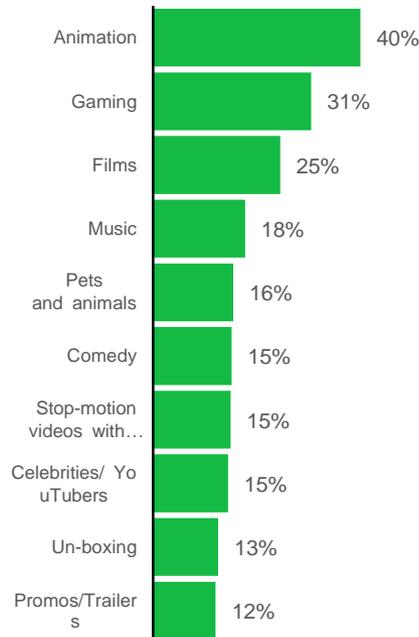
There may be a number of reasons. In many homes, there is a hierarchy of control over the television. Often, a parent chooses something they want to watch, which means kids have to go along with the parent, or use a tablet or phone, instead.

That said, kids cherish family occasions, when they can do something with mum and dad. This doesn't just mean going out somewhere, but also watching family-appropriate reality TV shows like *Bake Off* or shiny-floor shows like *Dancing with Stars*, or binge-watching a Netflix series all together.

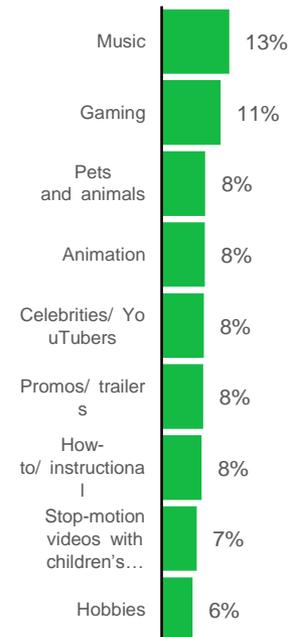
The bigger the screen the longer the content (generally)



On a television the established formats of comedy, drama, entertainment, animation. are still consumed the most. Shiny floor shows, reality TV and formats that facilitate co-viewing are especially popular.



Tablets seem to bridge traditional and newer video formats. Children are watching emerging formats such as gaming and stop-motion videos where children's toys are the main character. They are also watching cartoons, films and comedy on tablets.



Whilst we know that smartphones are ageing down we still don't find many 2-7 year olds who have one of their own. Therefore it's 8 year olds and above who are using the device. The video they are consuming tends to be more 'social' in nature as they follow their favourite celebs, share and watch clips and keep in touch across social platforms. The smartphone provides their 'social feed', which means a lot of short, 'snackable' content like music videos.



**Factors influencing kids
content consumption**

Quality of content

While we often talk about “quality content,” it appears that today’s young audiences don’t interpret quality the same way industry does. Kids focus less on production values and more on whether they relate to the content.

A broadcaster will spend a number of years creating a new show. It will be developed with a strong narrative, defined characters and have brand consistencies.

In contrast a YouTuber is sitting in a ‘cupboard’ producing, launching and getting feedback on a video within 24 hours. So every 24 hours they are learning more and more about their audience. One effect of this learning is that they iterate it back into their content.

So in the one year that a kids’ channel brand takes to produce a series a YouTuber has produced 365 pieces of content and had 365 ‘conversations’ with their audience base. In contrast kids channels don’t have a single real data point. Ratings don’t help a broadcaster, as they aren’t received until several dozen episodes are in the can.

Like a race between the tortoise and the hare. However, there is only 1 tortoise but millions of never resting hares.



Kids get locked into a gaming and video loop



On average, kids spend more time playing games and watching video on tablets and smartphones than any other activity (and this doesn't take into account the amount of time older kids spend playing console games).

When kids play *FIFA*, *Angry Birds*, *Fortnite* or *Roblox*, they will sooner or later 'get stuck', unable to progress without help. If they are playing app games, help is just a screen-tap away from the plethora of YouTubers who do walk-through or how-to gaming videos. Kids will watch one or more videos until they are confident they know how to get around the problem.

They go back to the game with the knowledge gained from the video, successfully complete the level, and move on until they get stuck again

...and so the virtuous cycle continues, with not a kids TV channel in sight.

The importance of accessible peers

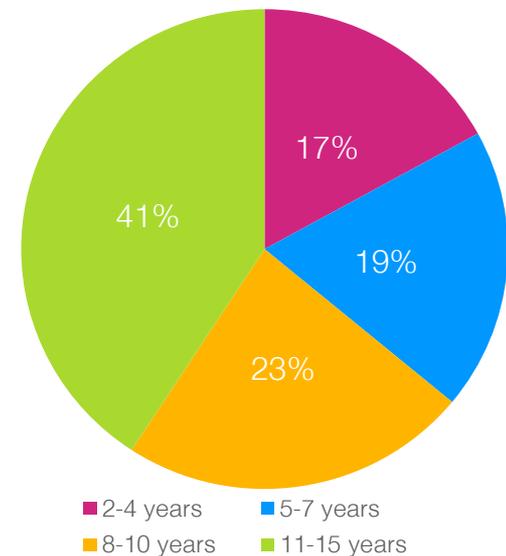
Now that YouTube has overtaken TV for teens (and is heading that way for younger kids), it can be hard to understand why YouTubers have such a powerful hold over kids.

An individual with a webcam and internet connection doesn't have the same editorial guidelines and production constraints as TV companies. They can comment instantly on news or pop culture; they can even take their fans on holiday with them. Parents may not see the appeal, but for kids it's all about being in the moment.

Many offer some type of expertise that kids are interested in, such as style tips or video game strategy – knowledge that provides social currency with friends or on the playground. Parent and children use videos to discover arts and crafts ideas, leading to quality time together, inspired by the screen.

If a kid can pick up a tip from a YouTuber on how to complete a level in a game before a school-friend, then it was time well spent.

YouTube
(Reach Profile %)



How do you get older kids to watch linear television?

Top 10 shows for children aged 10-15 (22 July 2016 to 21 July 2017)

Rank	Programme	Viewers	Shares (%)	Broadcaster
1	I'm a celebrity... Get me out of here	922,900	77.69	ITV
2	New Year's Eve Fireworks	850,500	71.79	BBC One
3	Britain' Got Talent	831,200	71.33	ITV
4	The Great British Bake Off	798,900	62.95	BBC One
5	The X Factor	587,100	46.39	ITV
6	Ant & Dec's Saturday Night Takeaway	580,100	52.86	ITV
7	One Love Manchester	576,100	62.89	BBC One
8	Doctor Who	540,000	38.22	BBC One
9	Strictly Come Dancing	517,500	48.19	BBC One
10	Planet Earth II	481,000	39.25	BBC One

Source: BARB/All homes. Only the top-ranked episode in a series is included

Actually they are coming to linear television, but not always the made-for-children content. Data from BARB, the UK's audience measurement standard, reveals that the most-watched TV shows for kids aged 10-15 from July 2016-17 were generalist shows on generalist channels. Using data for the wider 4-15-year-old demographic, the most watched made-for-kids shows are only reaching an audience of 180,000-200,000 by transmission time. Our Trends data shows that 8-10-year-olds are watching more generalist content, including soaps, 'shiny floor shows', reality series like *Love Island*, *Bake Off* and *I'm a Celebrity*. These top-rated shows all propagate social or co-viewing and generate conversation between family and friends.



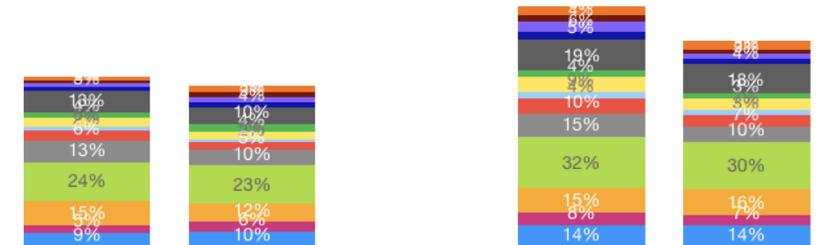
**Responding to changing
audience behaviours**

The importance of Fanatomy [fan-a'-tə-me]

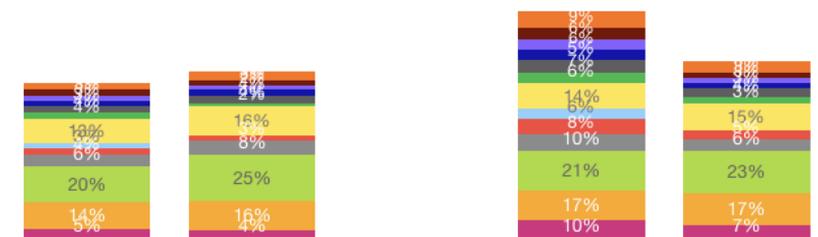
Cross-platform consumption



Star Wars - Cross platform consumption



Harry Potter - Cross platform consumption



- Watch on a television
- As a video/computer game
- A magazine
- Event (e.g. exhibition, live show)
- Watch online
- As a gaming app
- A toy
- An app that isn't a game
- Watch on DVD
- As a movie/film
- A book
- Music
- A board game
- Theme Park Attraction

YouTubers tweak their content to make it most relevant to the audience, but TV, film and books have been doing this for years.

The amount of sub-narrative and pre-text that exists for brands like Star Wars and Harry Potter means there is no end to the content that kids can explore.

They then create and extend the official narrative, based on their own interpretation of the themes and storyline. The theatrical release or final print issue may be the populist consumption, but what is left on the cutting room floor creates the fan.

YouTube has become the foremost gathering place where not only clips made from what was left on the cutting room floor are posted and followed by cuttings from every fan with a unique, often strongly-held opinion.

Think of it as a 'crowdsourcing of floor cuttings'. Just like with Fortnite and Minecraft the universe becomes 'exothermic'.

Kids have specific needs at different times of the day



Throughout their daily lives, kids have ‘moments’ where they have specific needs and desires to fulfil.

In the morning, before school, they want to be entertained whilst eating breakfast, but haven’t got much time. A film or hour-long series is out of the question, but short cartoons or videos are perfect.

In the afternoon, kids get home after a day full of lessons in school, and need time to ‘chill out’ before even thinking about studying or doing homework. This used to be the time when they turned on kids TV, and in many countries, generalist channels actually turned over their schedules to children’s TV.

Today, this time is as likely to be used to play Fortnite, watch their favourite YouTuber, or catch up on social media, as it is to watch Nickelodeon or Cartoon Network.

Is this a circular issue, though? If channels forgot how important this time of day is in kids’ lives, and reduce or stop their kids’ blocks, the audience drifted to other platforms.

Kids and parents want stuff to do together at the weekend. Where once they’d rent a DVD and order take-away pizza, and more recently they’d watch a film on-demand, now it’s as likely they’ll watch a shiny floor or reality TV show on a generalist channel.

The television set is now a communal place. We’ve found that 6-11-year-olds are least likely to be in control of what is watched, and so they get up at 6 am, just so they can choose what to watch on the family screen. Find the times when 6-11s have the remote control, and be there for them.

This report started by talking about how media owners created and built the big kids' brands, and how tricks and tweaks helped media moguls entrench their brands.

1. Kids don't flick through the channels

There was a time when kids would flick through the channels with a remote control, looking for something they wanted to watch and pausing when they saw something familiar or interesting. This was how they often found new shows/series. Now, with so many access points to video content they want to watch, they less often come across new shows or casual interests. It means new shows need more signposting at the times they are watching and on other media.

2. Generalist content aging down

Fewer televisions in households means families are coming together more often to watch a show. Often it's reality TV or 'shiny floor shows' but not always. Natural history series like *Planet Earth II* are great examples of other generalist successes. Lifestyle series like the BBC's *Top Gear* have successfully facilitated 'dad and lad' time. More recently we have kid extensions of reality series, e.g. *The Voice Kids* and *Junior Bake-off*. Thus, kids are spending more time with generalist shows on generalist channels. If these kid extensions were found on kids channels, perhaps families would come together to watch them there.

3. The importance of breadth and depth

One criticism of streaming services is they're all 'cartoons' with no texture. Curated channels have the advantage not only to time content to the available audience, but also to blend genres and formats. They mix animation and live-action so as to ensure one format doesn't dominate. Recently, linear channels have been behaving like SVoD services, with marathons and take-overs, but the result is that the channel no longer demonstrates the breadth and depth of content that kids love.

4. The importance of heritage

Not all the content kids engage with is new. A new property only proves its success if it can sustain for over time. Brands that have been around 10, 20, even 50 years are as loved by today's kids as they were by their grandparents. In the past, heritage brands nearly always started in film, toy or TV. But as digital brands like Angry Birds mature, increasingly heritage brands will have a digital origin. Heritage brands are important because they have the ability to facilitate occasions when parent and child come together.

5. There's much to learn from video games

Game franchises have the power to captivate audiences. Fortnite, like Pokemon Go and Minecraft before it, fast became a cultural phenomenon. There's a lot legacy media can learn from this game that satisfies kids' needs so readily. It's 'snackable' (there's another game starting in moments), it's social (you can interact with friends), it's familiar (it borrows the best elements of other games) and it balances scarcity and ubiquity (like streaming, you're never more than moments from what you want).

About the Author

Adam Woodgate

Adam has worked in broadcast media and publishing for almost 30 years, having worked for London Weekend Television, BBC Worldwide, Guardian Media Group, Immediate Media Co. and Emap plc (now Bauer). He has had roles in editorial, production, content creation, marketing and insight. Solid experience in large scale quantitative projects as well as in-home immersions and co-creations. He has consulted on numerous projects for Fox International Channels, Sky Media, Channel 4, Viacom, Sony Pictures Television, RAI, BBC Worldwide.

He currently heads up Dubit Trends - the largest global children's media trends tracker, now covering 14 countries. He works closely with broadcasters, publishers, media buyers and content creators, advising on strategy based on media consumption and emerging trends.

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