Representation, Integration and Diversity in Children's Media: Challenges and Opportunities

What are the main evolutions and specific challenges for school age children in European countries?

@TRT 11/2017

Christophe Erbes

INTRODUCTION AND PLAN

1. ME

2. (SCHOOL) KIDS / INTEGRATION

3. CONTENTS EVOLUTION

4. DISTRIBUTION FUTURE

5. EXAMPLES: FRANCE, UK

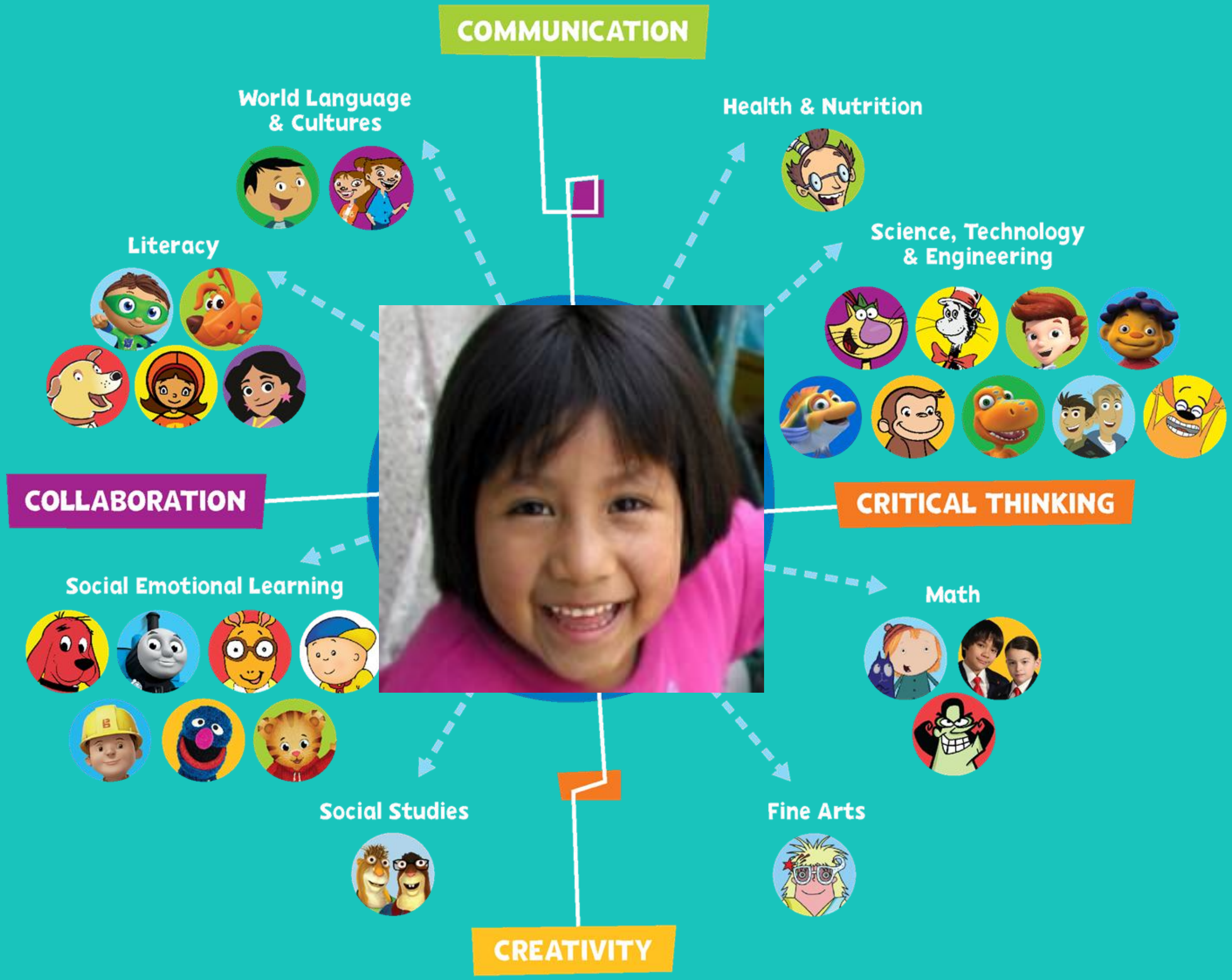
CANAL+

Me
Half French Half German – 2 cultures (+ Europe + US) NOT scientific POV but pragmatical observations
Former kids TV (Canal+, Sky Deutschland, SuperRTL, Nickelodeon, DisneyXD)
From Assistant to Head of programs and MD
Now consultant (Orange, Lagardère, UER, Ubisoft, MFG, TF1 international...)
Author (books, TV series, films, docs)
Host (Mip, Annecy, Cartoon, APD...)

nickelodeon

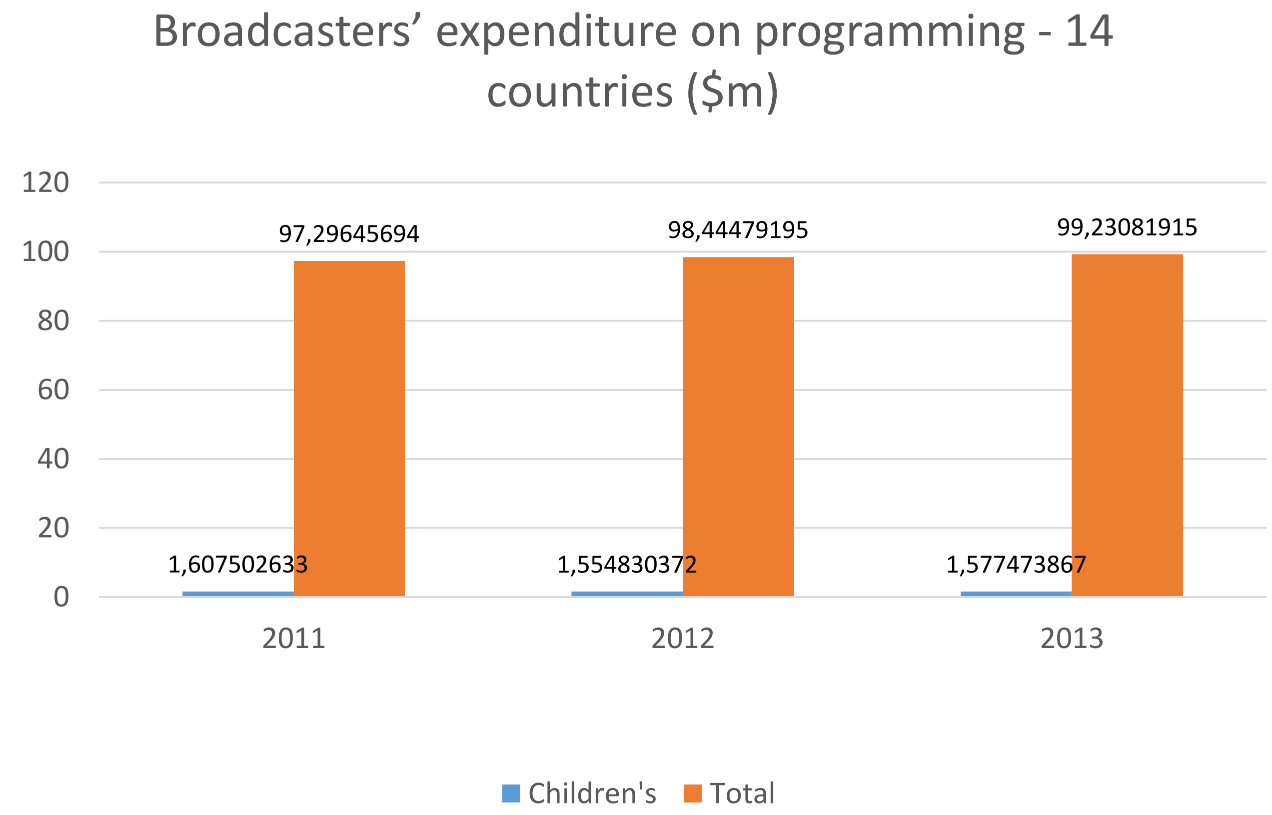
+ GKMC (Global Kids Media Congress)
2015: „In few years, what will be the best Kids TV/screens?“
2016 „Which content, when and where?
2017: „Virtual and real media kids toady and tomorrow“
12 speakers/presentations in 6 themed blocks incl. round-tables
60 participants, all Kids TV (pubcasters/private, national/international, pay/free)

The Whole Child



How important is Children's TV?
less than 2% of total programming expenditure!

Paradox as media has biggest impact but "Minority" (around 15%)
Many preconceived opinions & small economy...
Exceptions: Scandinavia (child = person), French "cultural exception" (1981), English speaking trade worldwide (BBC, Disney)...



Source: IHS TV Programming Intelligence

CHILDREN TARGET(s)

Fragmentation / INTEGRATION? DIVERSITY!

Challenge and chance: each kid is unique!

0-2

2-5 preschool

4-7 upper preschool / transition

(parents)

6-9

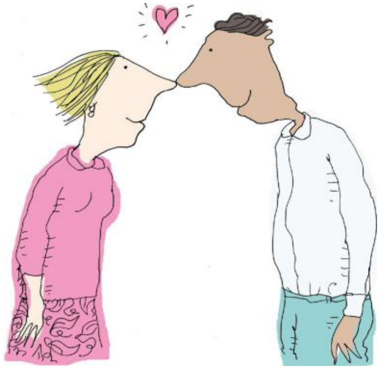
8-12

Boys / Girls

Market formats: 104x5‘, 39x7‘, 52x11‘, 26x22‘ - 2D / CGI / hybrid – Genres: adv/com/edu

Source: Eurodata TV Worldwide / Relevant partners – All rights reserved

INTEGRATION



How? Where?

Kids unique, curious („learning sponge“), non political?
Integration into...

- Family
- School
- National culture & society
- World culture (www, myth & tales, Disney...)

Source: Eurodata TV Worldwide / Relevant partners – All rights reserved

INTEGRATION

How?

References?

Getting older younger! (how to adress 8+? see www)

Role Models – parents, sibblings, friends, super heroes

Fragmentation (e.g. DisneyXD): Girls / Boys heroes

Local / Global (3 big networks, Youtube, Netflix...)

Advertising (consumerism, social „clichés“)

Source: Eurodata TV Worldwide / Relevant partners – All rights reserved

ADVERTISING and CHILDREN
(underlining pubcasters special role!)

- no kids advertising category! Comparatively small

- no kids products in top 15 investors

- UK BBC / ITV, PBS - USA

- Scandinavian ban / France in pubcaster 2018

- issues: confusion info/sales, obesity / nutrition

- big players Mattel / Hasbro, Lego, Ubisoft own productions

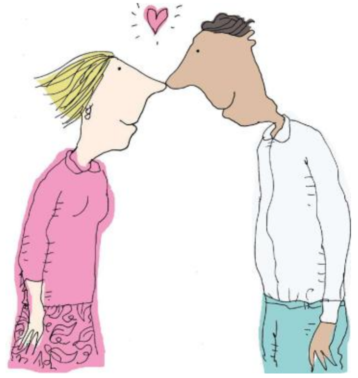
Investissements en communication des annonceurs en 2

	en M€	Parts de marché		Evolution 2014/
Total presse	2 620	8,8 %	24,9 %	- 8,1 %
quotidiens nationaux	*155*	*0,5 %*	*1,5 %*	*- 9,7 %*
quotidiens régionaux	*596*	*2,0 %*	*5,6 %*	*- 6,3 %*
hebdomadaires régionaux	*74*	*0,2 %*	*0,7 %*	*- 2,6 %*
magazines	*963*	*3,3 %*	*9,1 %*	*- 8,8 %*
presse professionnelle	*259*	*0,9 %*	*2,5 %*	*- 8,0 %*
presse gratuité d'annonces	*246*	*0,8 %*	*2,3 %*	*- 10,0 %*
presse gratuite d'information	*147*	*0,5 %*	*1,4 %*	*- 14,5 %*
collectivités locales	*181*	*0,6 %*	*1,7 %*	*- 3,0 %*
Radio	859	2,9 %	8,2 %	- 1,6 %
Télévision	3 853	13,0 %	36,6 %	+ 0,4 %
Publicité extérieure	1 326	4,5 %	12,6 %	+ 0,8 %
dont : *grand format*	*457*	*1,5 %*	*4,3 %*	*- 1,5 %*
transport	*370*	*1,2 %*	*3,5 %*	*+ 2,6 %*
mobilier urbain	*395*	*1,3 %*	*3,7 %*	*+ 1,5 %*
Cinéma	125	0,4 %	1,2 %	- 9,6 %
Internet	1 755	5,9 %	16,7 %	+ 5,2 %
achat d'espace	*689*	*2,3 %*	*6,5 %*	*+ 7,0 %*
liens sponsorisés	*1 066*	*3,6 %*	*10,1 %*	*+ 4,0 %*
Total médias	**10 538**	**35,6 %**	**100,0 %**	**- 1,4 %**
Annuaires imprimés et internet	977	3,3 %	5,1 %	- 5,8 %
Marketing direct	8 334	28,1 %	43,7 %	- 4,9 %
dont : *mailings et e-mailings*	*3 553*	*12,0 %*	*18,6 %*	*- 9,3 %*
imprimés sans adresse	*2 864*	*9,7 %*	*15,0 %*	*- 1,5 %*
Promotion	5 292	17,9 %	27,7 %	+ 1,6 %
Salons - foires	1 515	5,1 %	7,9 %	+ 1,0 %
Parrainage	832	2,8 %	4,4 %	+ 3,5 %
Mécénat culturel (hors fondations)	293	1,0 %	1,5 %	- 5,0 %
Relations publiques	1 842	6,2 %	9,7 %	+ 3,0 %
Total hors-médias	**19 085**	**64,4 %**	**100 %**	**- 1,7 %**
Total marché	**29 624**	**100,0 %**		**- 1,6 %**

Investissements nets 2014 - Source France Pub-Irep

Source: Eurodata TV Worldwide / Relevant partners – All rights reserved

INTEGRATION
IMMIGRATIONS



In Europe, different immigration times:

Earliest with (end of) colonial times (mostly UK & France – Africa, Asia): long tradition of integration and social issues

But historical strong intra national diversity

Eastern European politics & Industrialisation (within Europe South / North, Africa) - Assimilation „easier“ within Europe (M.Valls,A.Hidalgo...)

Recent immigration, mostly in Sweden & Germany

Role models are offered throughout TV landscape, kids and non kids

Source: Eurodata TV Worldwide / Relevant partners – All rights reserved

CONTENT TRENDS

Children representation?!

In 2017 in the countries studied by Eurodata TV Worldwide, the NoTa Kids service has identified the following four major themes :

1. Discovery of the outside world – DIVERSITY / INTEGRATION?

2. Children and their immediate family and friends

3. Imaginary worlds – for ALL (animals, fantasy...)

4. Play and fun come first! - END of 123/ABC, (hidden) social / emotional agenda (EQ), edutainment

Source: Eurodata TV Worldwide / Relevant partners – All rights reserved

What works best with kids overall ?

Programs featured in the top 3 shows all genres combined by country (July-Dec 2014, Jan-June 2014 for S. Korea)

Movies

#3 In Spain,
Toy Story 3
34.3% shr on Chl. 4-12
Antena 3 – 22:30-00:30

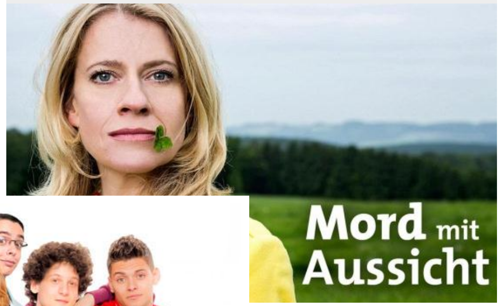
Series

#3 In South Korea,
Wang's Family
65.1% shr on Chl. 4-14
KBS2 – 19:45-21:00

Animation

#3 In Germany,
Yakari
45.9% shr on Chl. 3-13
Ki.KA – 19:10-19:25

The Wang Family KBS2



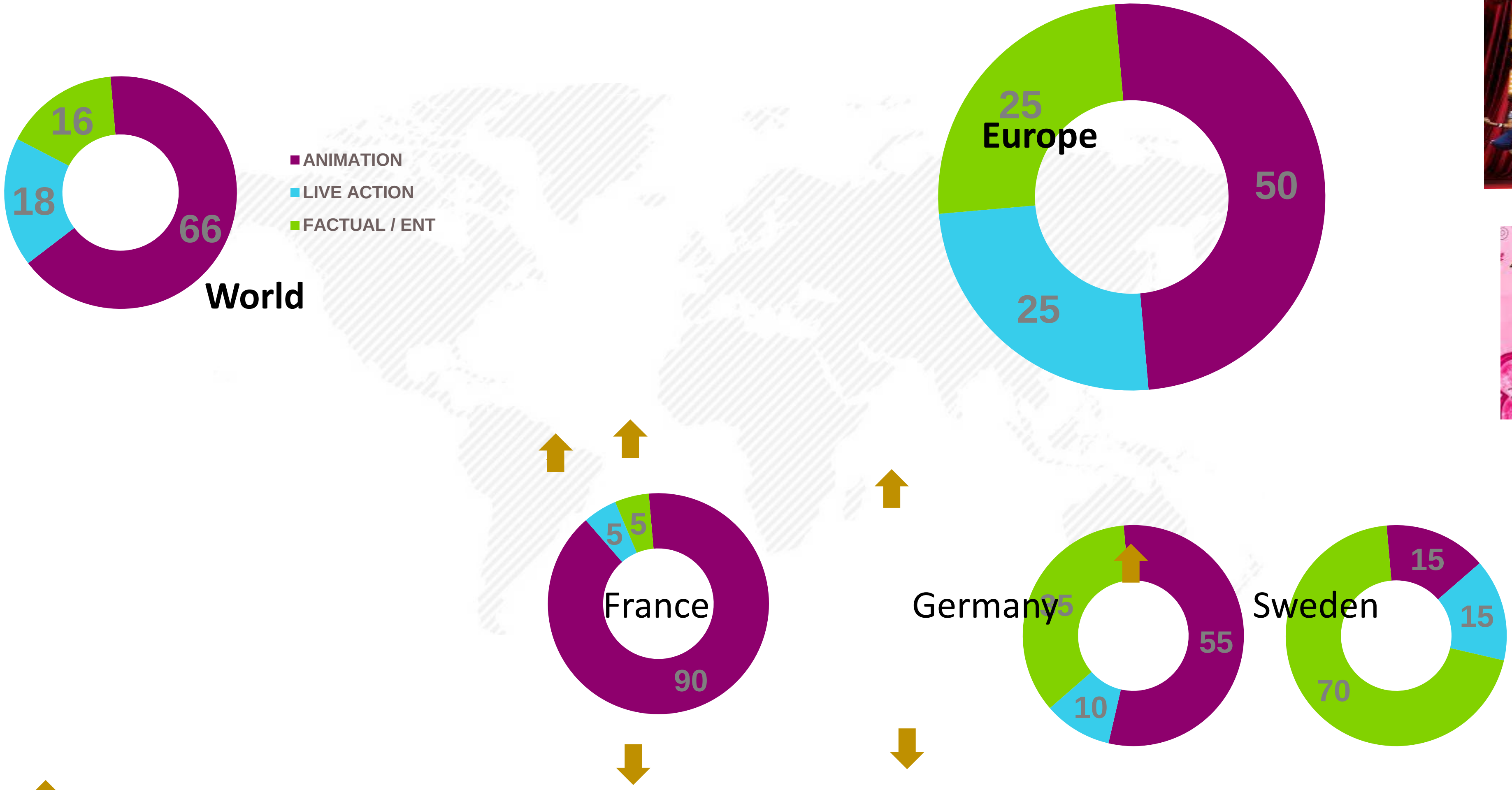
Pep's – TF1

Yakari – Ki.KA

Source: Eurodata TV Worldwide / Relevant partners – All rights reserved

Content diversity - kids' favorite shows by genre
Most direct cultural and social representation = Live action!

Programs featuring in the top 20 shows by country (July-December 2013)
Europe: France, UK, Germany, Italy, Spain, Portugal, Denmark, Sweden, Norway, Finland
World: Europe, Asia, USA, Canada, Australia, Russia, UAE, Israel

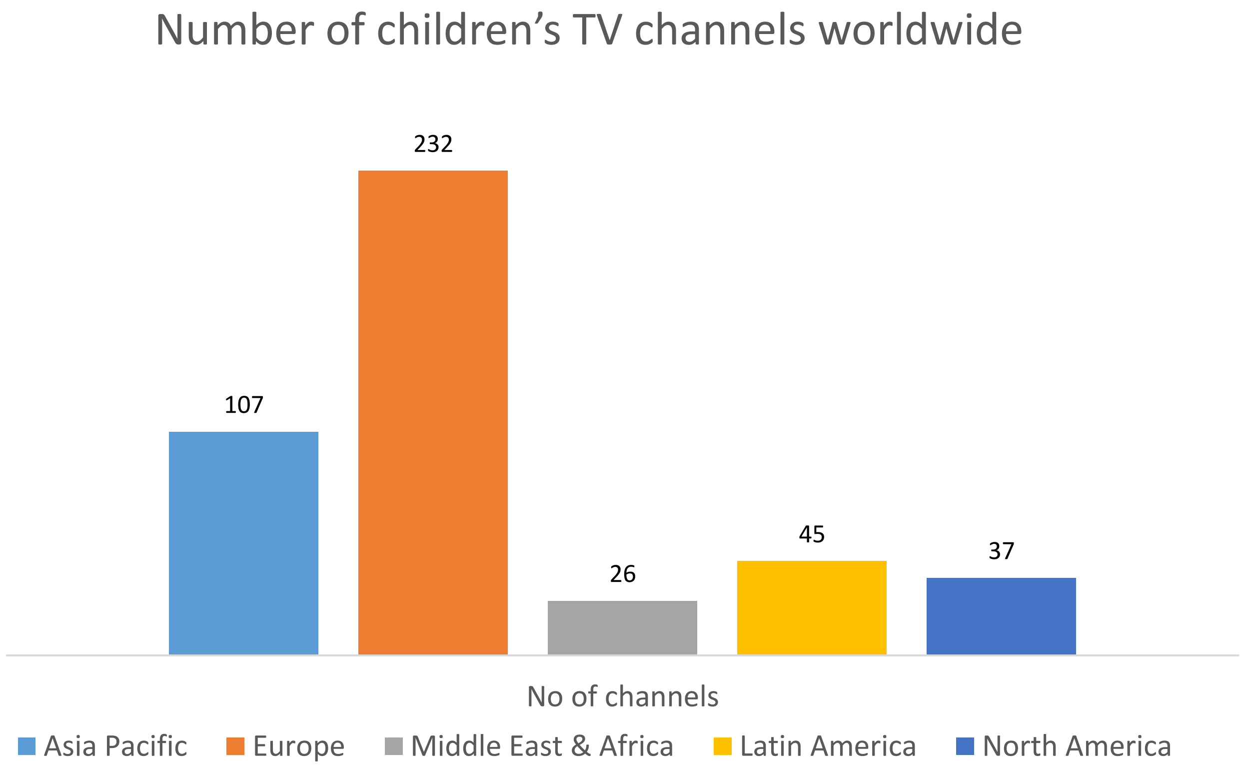


Trend between July-Dec. 2013 & July-Dec.2014

Source: Eurodata TV Worldwide // Relevant partners – All rights reserved

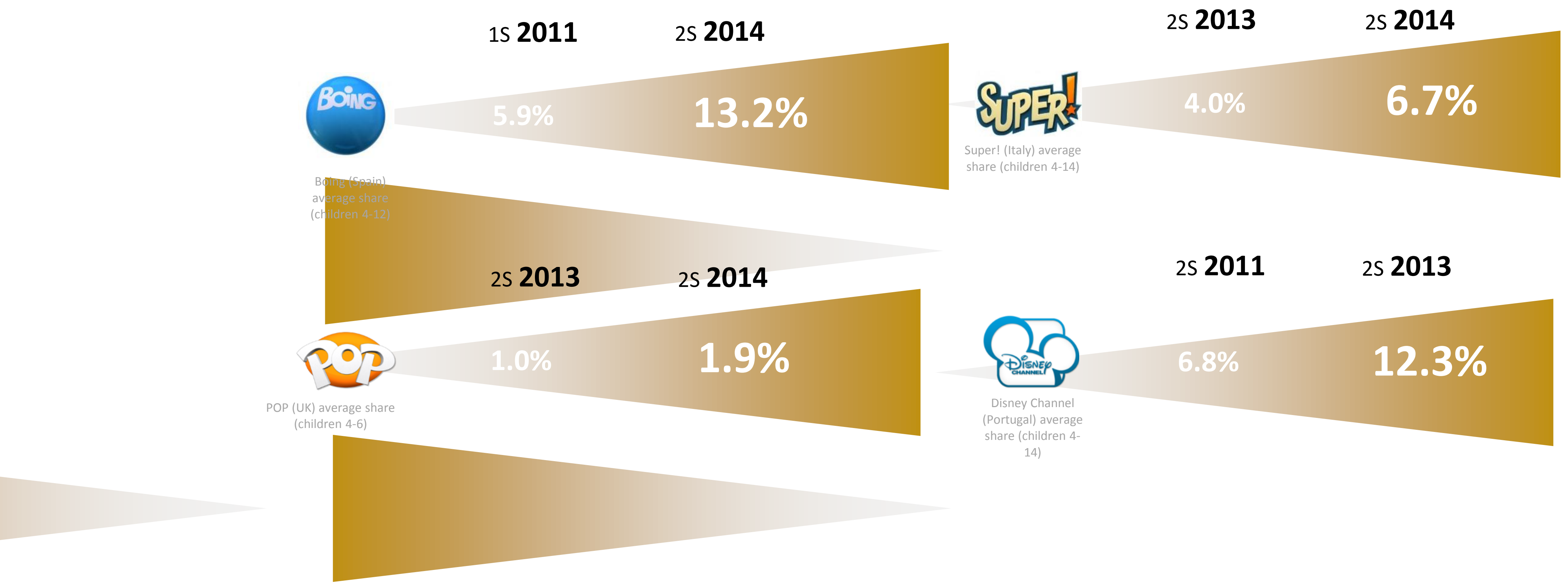
But still growth children's channels worldwide

447 according to IHS' count



Source: IHS TV Programming Intelligence

Continued growth of dedicated children's channels

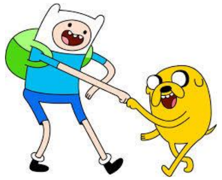


3 INTERNATIONAL KIDS NETWORKS

- Disney \$52,5B total – really 360° DISTRIBUTION POWER:
- TV \$23,3B (ESPN, ABC + 100 Disney Ch 95Msubs USA et 195Msubs international, \$12B subs + \$8,4B ad rev + \$1,9B TV/SVOD sales)

- Park \$16B, Studio \$7,4B, CP \$4,5B & Interactive \$1,2B
- Brand values: optimism, family -
- School kids: Live action for girls, super heroes (Marvel) for boys
- Nickelodeon: was kids first/centered

- But lost it when Disney live action took over and deals like PowerRangers / TMNT



- Cartoon Network : fun

But most LOCAL kids channels on top

#1 children's channel by market

Market shares (%) on broadcast slot (January-June 2014, July-Dec 2013 for Malaysia)

Children

Malaysia | Australia | France | Denmark | Spain

Preschool

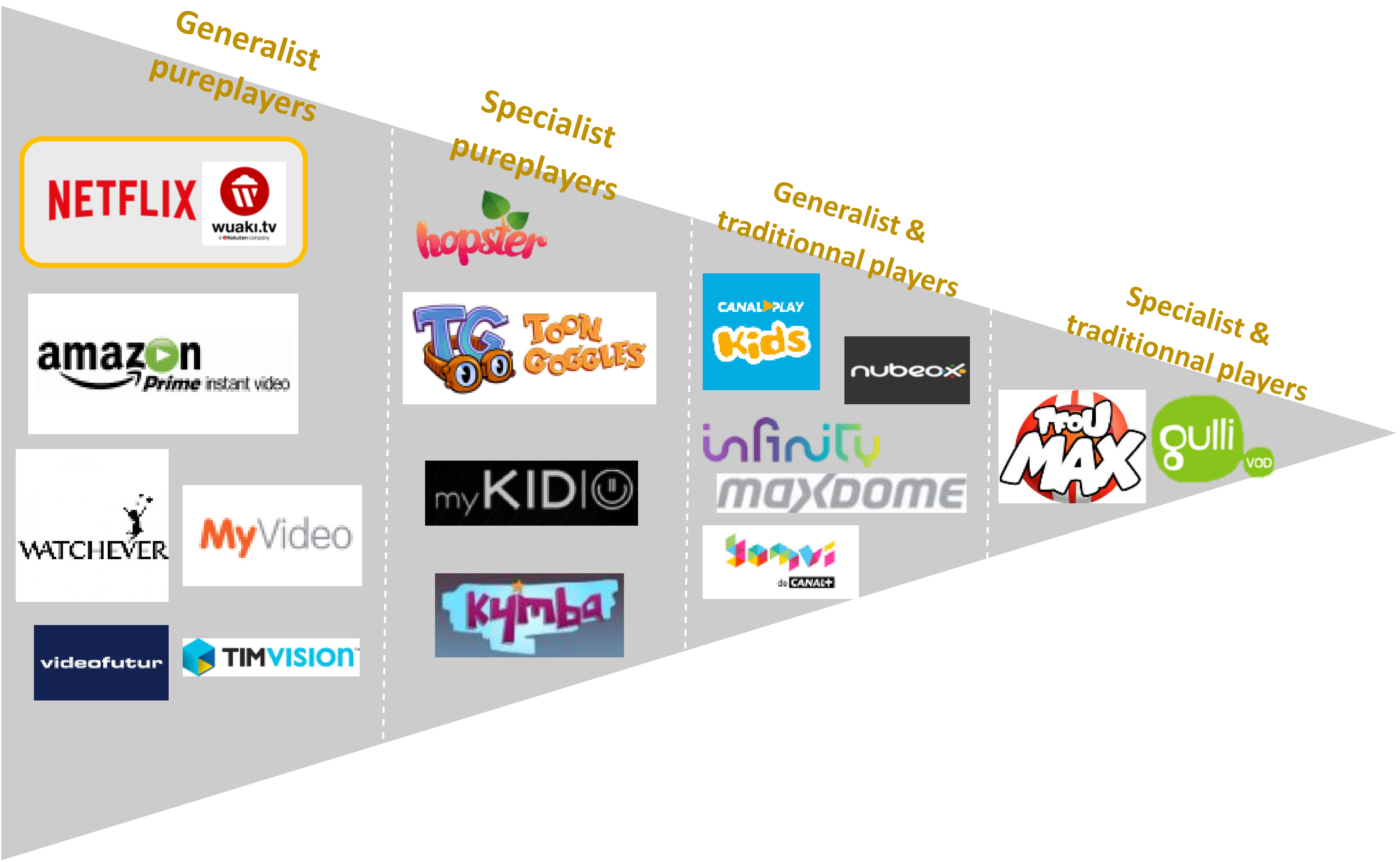
Karusel

Canada | Germany | Russia | UK | South Korea

NB : The market shares for Malaysia and South Korea are estimated on a program basis

Source: Eurodata TV Worldwide / Asia (except china) : Nielsen Television Audience Measurement / Relevant partners – All rights reserved

SVOD Kids contents offer further booming!



Source: Eurodata TV Worldwide / Relevant partners – All rights reserved

Pay / S-VOD growing & investing in exclusive content

Binge viewing / L&M issues / GLOBAL DISTRIBUTION

NETFLIX

amazon Prime instant video

Renewed for 3 season, emmy awards

Tumble Leaf

Just Add Magic

The Stinky and Dirty Show

The Adventures of Puss in Boots
Since January 2015

Par11tnerships: Dreaworks Animation

Richie Rich
Early 2015

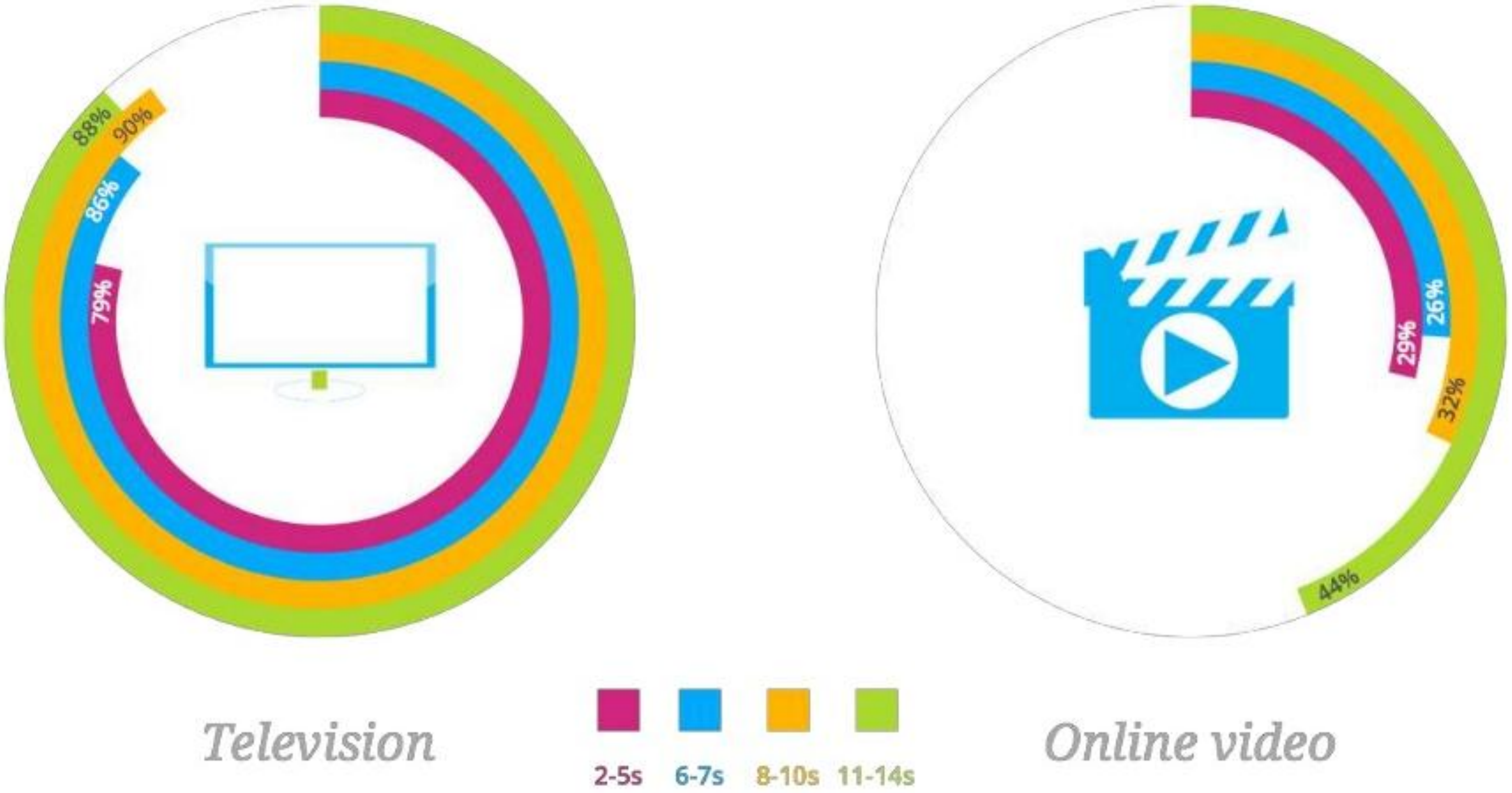
110Mio subs (47% in USA)
2,5 viewers/HH kids/family/double digit growth of kids audience
Kids = „sticky“, less churn (like PayTV)
50% kids content prod. outside USA/37 Netflix originals in 2017
“Roughly half members around the world regularly watch kids content / strong investment in kids programming,” Andy Yeatman, director global kids content Netflix. “We know kids love Netflix and that’s in part because they never really outgrow us. We program and recommend new TV shows and movies from preschool through their teen years and into adulthood.”
Future: 130Mio subs by 2020, leading with original content

100% pilot financing (200k) and audience testing!
Open the gates to sales platform for L&M?
Key criterias pay content: Choice, Security, Convenience, Control (for parents) no advertising (see Sky, CanalFamily)

Source: Eurodata TV Worldwide / Relevant partners – All rights reserved

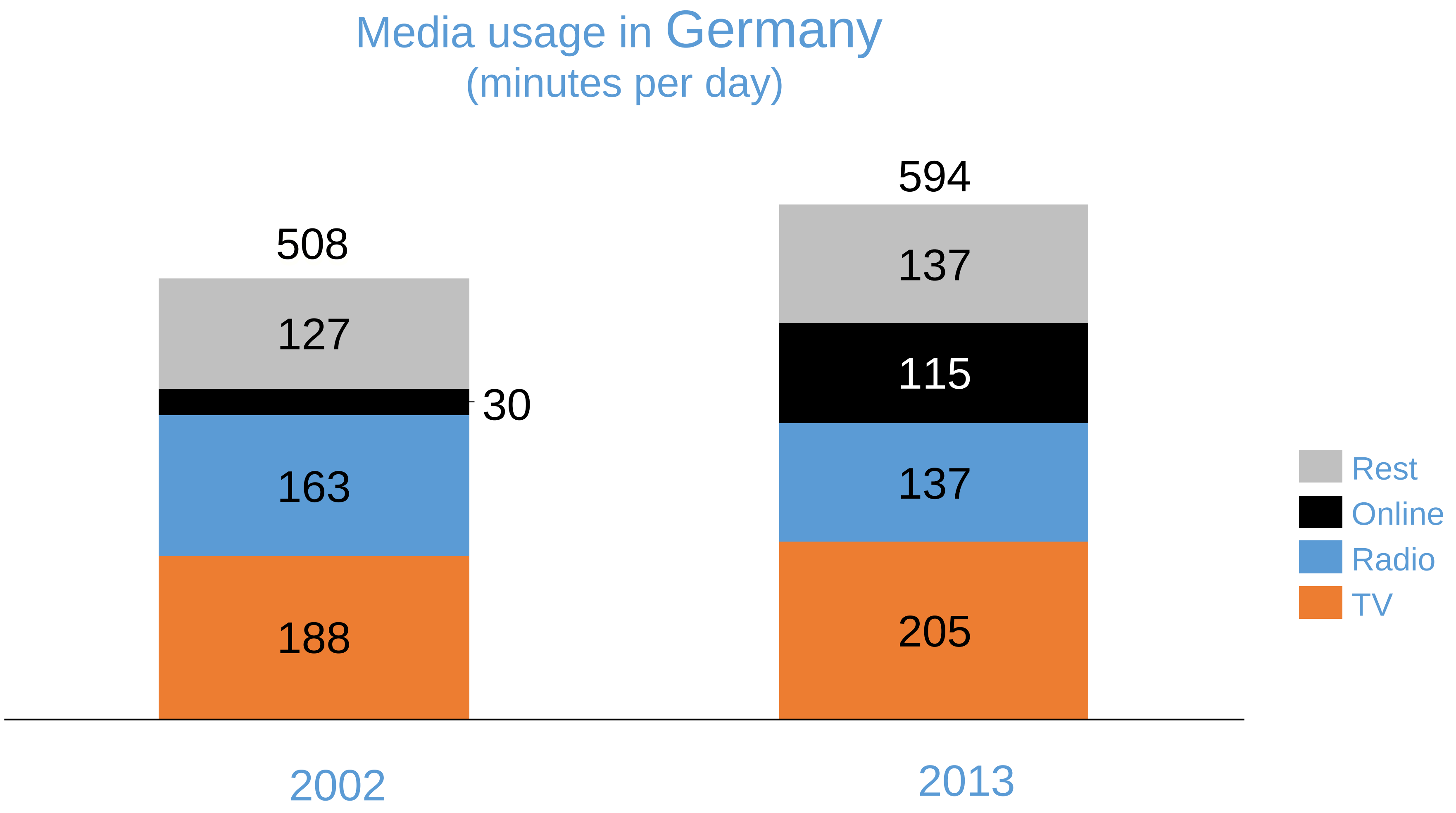
Kids media habits are quickly changing

Early adopters
29% of 2-5 year-olds and 25% of 6-7 year-olds are watching videos online everyday (US + UK)



Source: 2014 Study by Dubit and Sherbert with over 5,000 adults and children in the UK the US.
http://www.dubitlimited.com/blog/2014/07/07/how-young-early-adopters-share-new-entertainment/

Linear TV still increased but online “explodes”



Source: SevenOne Media, Research Flash No. 19, Mediennutzung 2013;

DECLINE OF LIVE TV VIEWING

Average number of minutes kids in EMEA spend watching TV daily

165Mio

2011

-12%

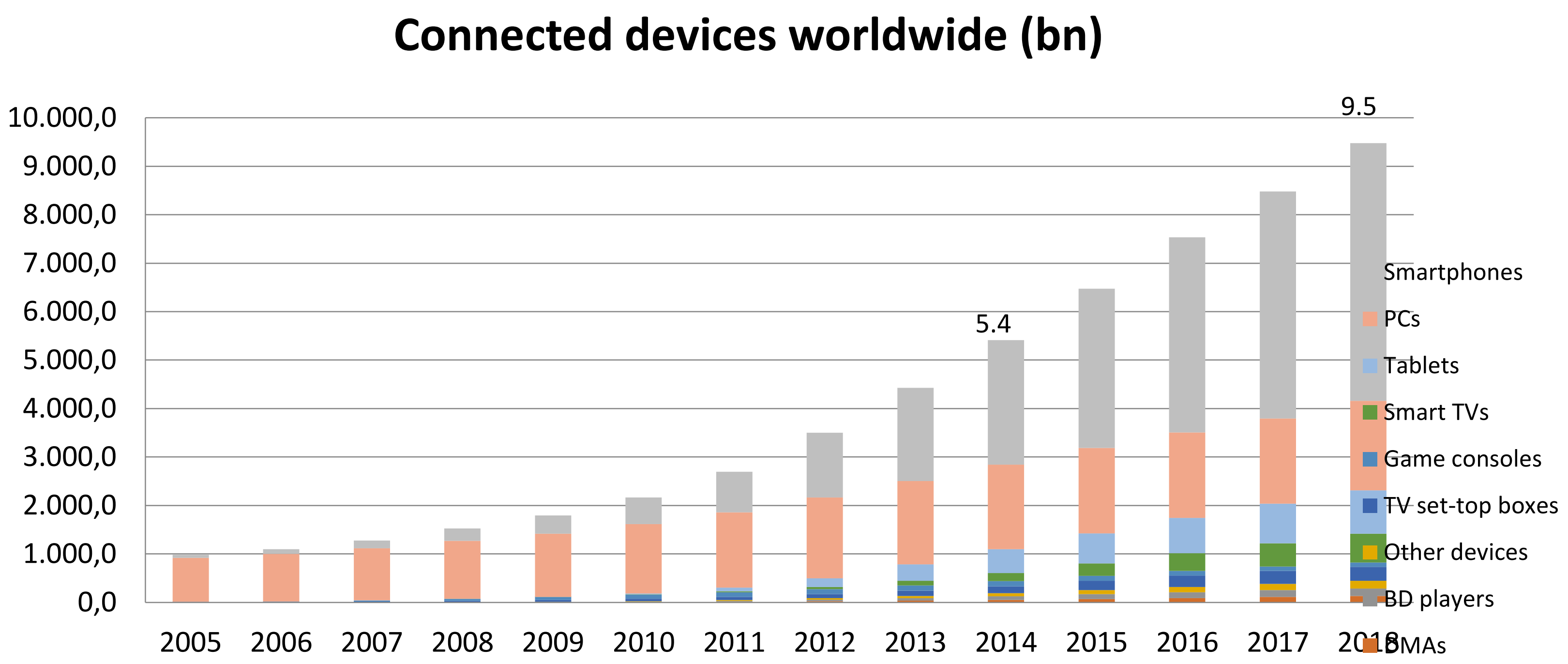
144Mio

2016

Viewing of all TV channels in 2016 vs. 2011 Avg. min. watched by kids daily

+/- 3% change since 2011 (except for Romania where we compare to 2012 due to changing panel supplier in 2011); Source: Local People Meters [UK (BARB), PO (Nielsen), ES(Kantar Media), GE (AGF / GfK), HU(Nielsen), RM (ARMA / Kantar Media), DK (TNS Gallup), SE (MMS), ZA (DSTVi), IT (Auditel / Nielsen); FR (Mediametrie Audience Measurement | Mediamat'Thematik) ; Universe: All Homes, FR (Pay TV) Kids age ranges vary per country: UK & PO: 4-15yrs., ES: 4-12 yrs., DE: 3-13 yrs., FR, HU,RM,DK,SW,ZA,IT, UAE: 4-14yrs; Time Band: All Day; Metric: Avg Min (All); Period: 2016

The number of internet-connected devices is multiplying (smartphones outgrowing PCs)



Source: IHS Broadband Media Intelligence

"Other" screens are everywhere

France

94.7%
of 4-14 in hh with **Computer**

64%
children 4-14 in hh with **Tablet**

UK

53%
of 8-11 year olds have a **TV** in their bedroom

62%
of 12-15 year olds own a **Smartphone**

USA

2011
52%
of 2-10 year olds own a **Smartphone**

2013
75%
of 2-10 year olds own a **Smartphone**

Norway

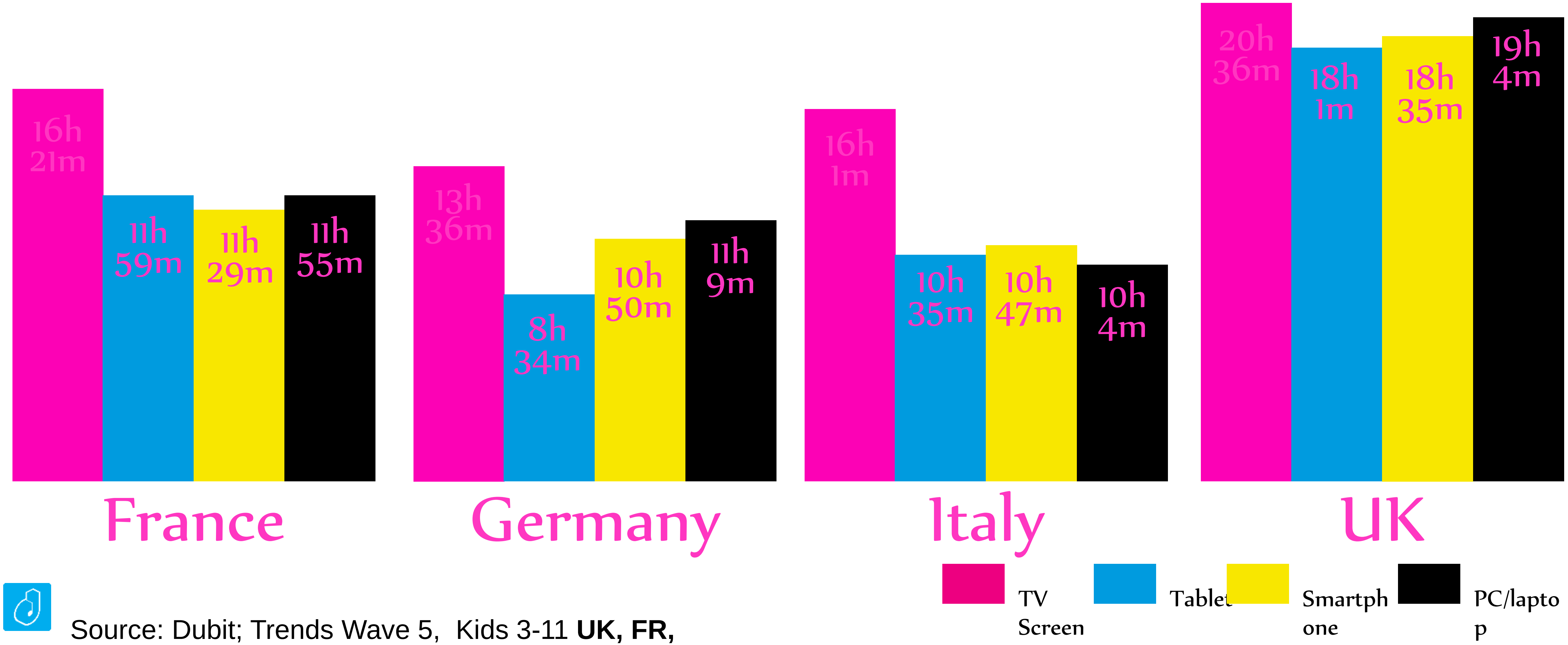
46%
of 3-11 own a **Smartphone**

26%
of 3-11 own a **Tablet**

Sources: Home Devices T4 2014 / Commen Sense Media 2013 / ITV/Tonight Survey / TNS Gallup – Media and Children Survey 201

Source: Eurodata TV Worldwide / Relevant partners – All rights reserved

WEEKLY SHARE OF TIME
KIDS 3-11



Source: Dubit; Trends Wave 5, Kids 3-11 **UK, FR,**

TOP ACTIVITIES ACROSS MOBILE DEVICES

Watching videos

41%

Playing games

44%

Messaging

36%

Source: Dubit; Trends Wave 5, Kids 3-11 **UK, FR, IT, DE**, Oct 16

CONTENT EVOLUTION
MULTIPLATFORM CONTENT DEVELOPMENT

LONG FORM

SHORT FORM

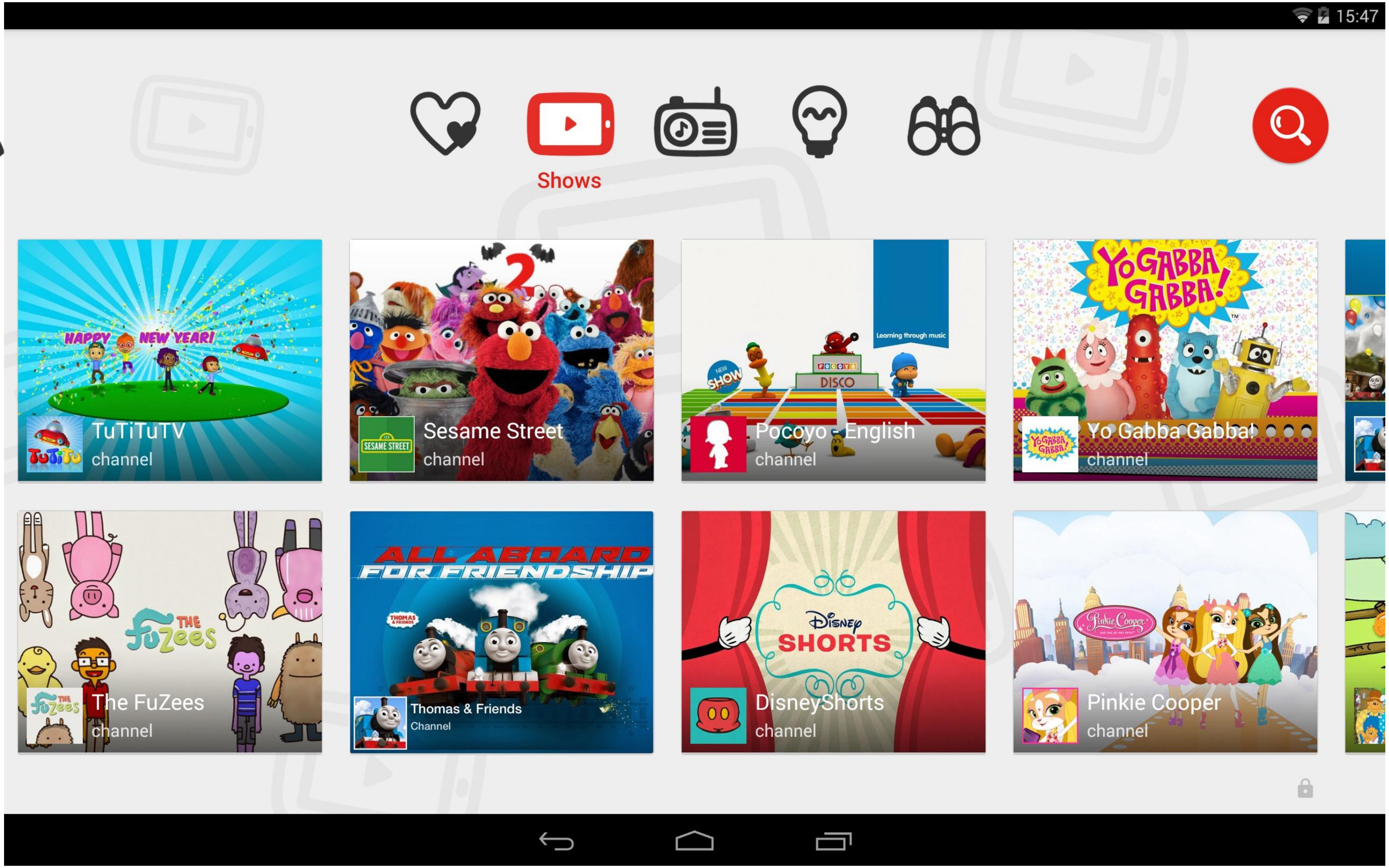
APPS GAMES

APPS GAMES

SHORT FORM

LONG FORM

YouTube KIDS



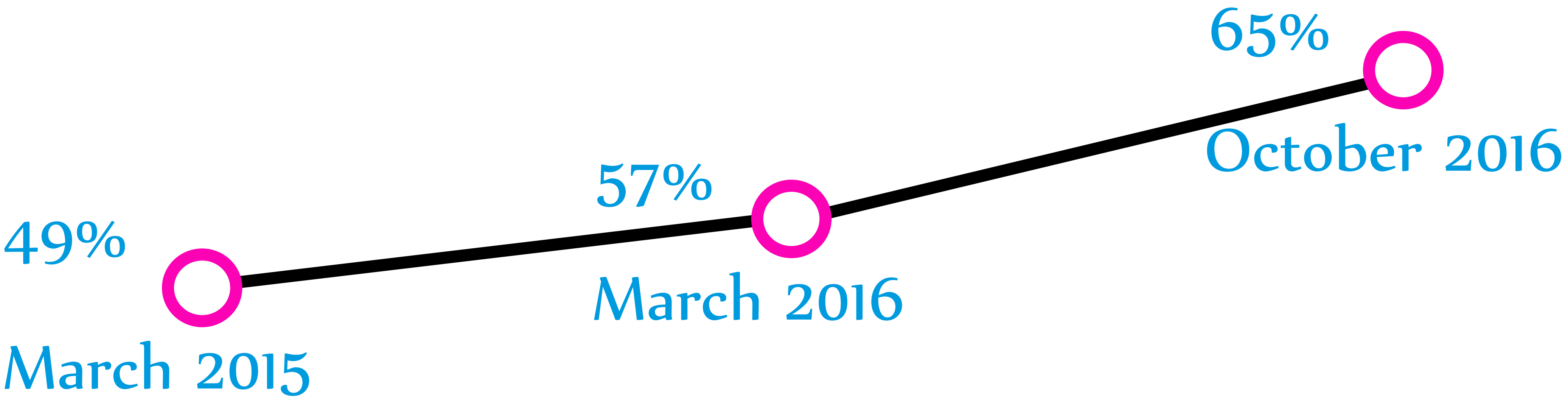
Google play

Available on the iPhone App Store

https://www.youtube.com/watch?v=OUmMAAPX6E8

YOUTUBE GROWTH

Kids 3-11 USING YOUTUBE ONCE A WEEK



Source: Dubit; Trends Wave 5, Kids 3-11 **UK,** Oct 16

Youtube main target 8-17?! SCHOOL KIDS?!

Half of YouTube's top 10 channels are for children, generating more than 1.8bn monthly video views

Exploding growth: +200% time spent on YouTube family content in 2014 (compared to +50% in general)
Educational videos views = 2 x animal videos views
On demand/interactive platform allows to build, create, engage, code

"About 65% of the channels that are surfaced here are not from the United States.
They are from around the world and have a global audience," Malik Ducard

Extending brands on YouTube (with TV): e.g. Furchester Hotel, Thomas &friends,

Establishing new brandson YouTube: VSAUCE 8,4mio subs, ASAP Science 3,5mio, 56' on LITTLE BABY BUM
One of biggest channels are UK animated nursery rhymes, generating millions €/month – 50% top 10 channels are animation
Phenomenos: UGC, YOUTUBERS and SHORTER FORMATS

YouTube Kids app started in USA: 8mio downloads in 2 weeks! Now around 20mio!
4,3 star rating and Nr2 free entertainment App on Android 4,0 and Nr1 free kids app on Apple)
Now in Europe and around the world? Mostly for preschool but what about 6+?
Free but myaybe soon freemium and Youtube Red (no add, exclusive content selection, exclusive coproduction)

Is Youtube a competitor for TV? Not yet: so far, good partnership and communication tool (e.g. VIOLETTA from Disney)
But next steps?!

BRAND PASSION

	1	2	3	4	5
	YouTube 23%	LEGO 23%	playmobil 16%	Candy Crush SAGA 13%	Barbie 8%
	LEGO 29%	WhatsApp 25%	YouTube 21%	playmobil 13%	Barbie 9%
	WhatsApp 41%	YouTube 26%	LEGO 21%	Candy Crush SAGA 14%	Barbie 12%
	YouTube 27%	LEGO 18%	WhatsApp 17%	Candy Crush SAGA 10%	Peppa Pig 7%

Source: Dubit; Trends Wave 5, Kids 3-11 **UK, FR, IT, DE**, Oct 16

MORE BRANDS
but more concentrated: harder to establish new hits

	March 2015	March 2016
Number of different brands	1005	1129
Top 5 brands (sum)	68%	76%

„Milestones“

Sesame street / Pokemon / Simpsons / Power Rangers / Teletubbies

Source: Dubit; Trends Wave 5, Kids 3-11 **UK,** Oct 16

BRANDS: Content & devices / 360° DISTRIBUTION

David Kleeman (Dubit)

ESTIMATION TV SALES – Not enough and shrinking!
Financing issues if not BIG market (USA) OR political support (e.g. France, China)

Exemple new series per half hour

TV licenses for **first cycle** (3-5 years) next cycles: 50%)

Western Europe	20k€	
Eastern Europe:	2k€	
Scandinavia:	4k€	
Northern America:	30k€	
South America:		5k€
Asia		3k€
Australia/NZ:		2k€
Total:		66k€

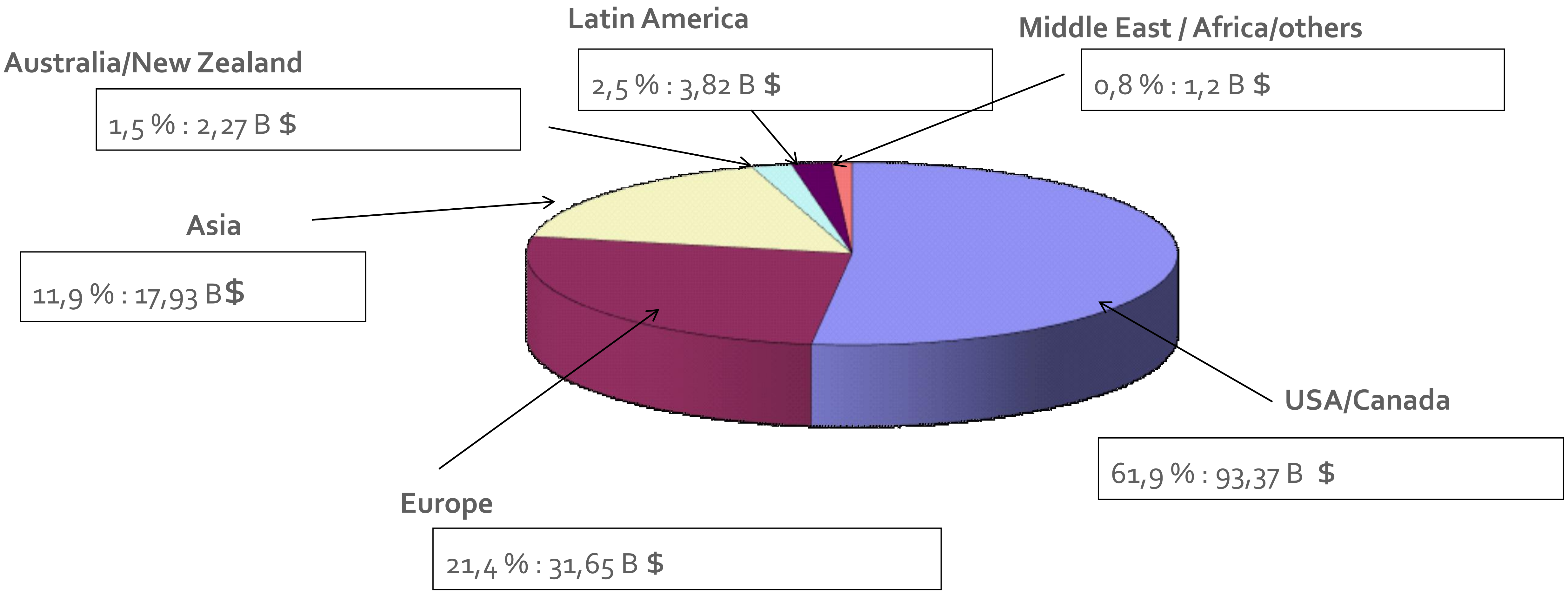
DVD/VOD for total **serie**:	USA:		250k€
	Australia:	70k€	
	Canada:	100k€	
	UK:		130k€
	ROW:	300k€	

Is LICENSING & MERCHANDISING the answer?

Important to establish brand – marketing – REVENUES (World wide TV licenses below production costs)

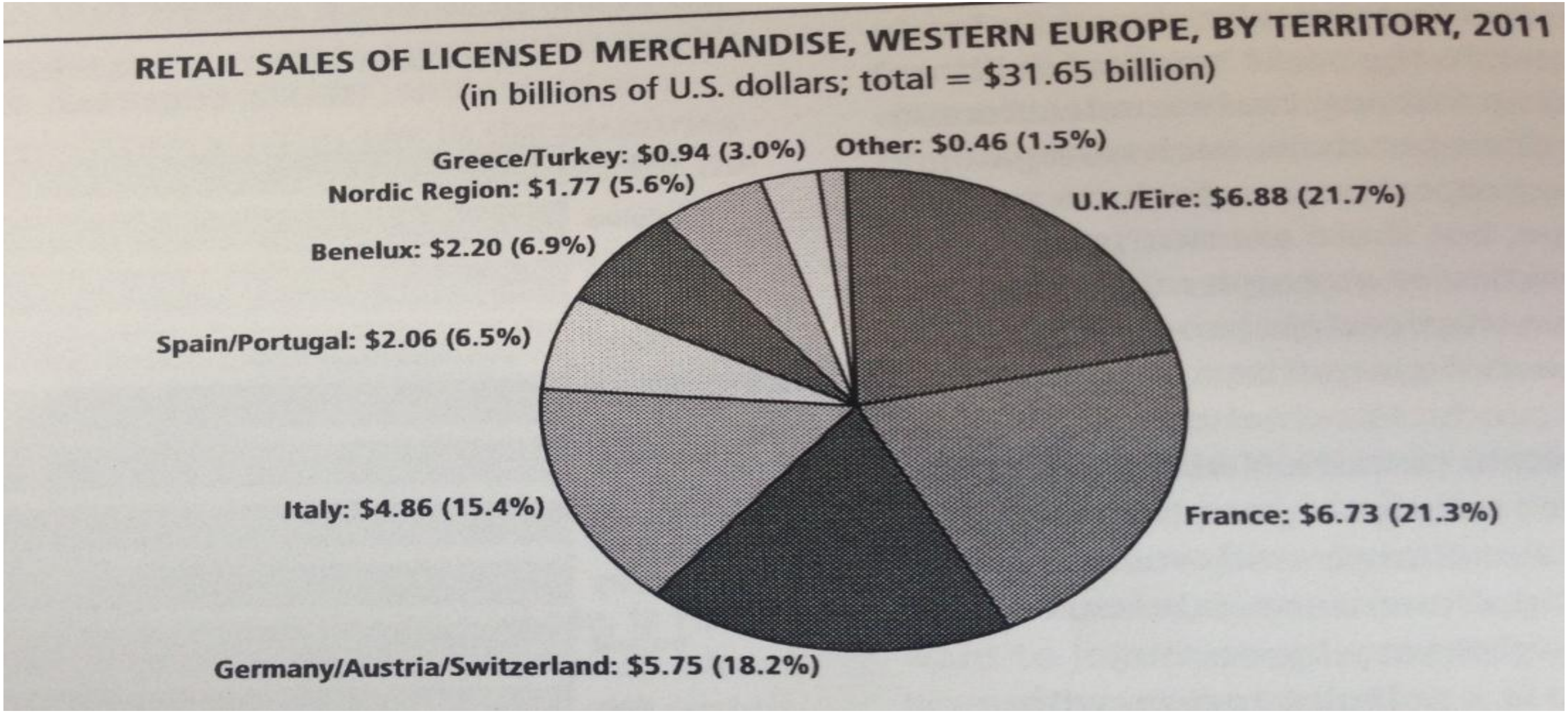
- But « lottery »! only 1% of projects got a L&M chance
- 185Mrds$ business in retail value (60% USA, 20% Europe, 20% ROW)
- e.g. HIT turnover 90% = L&M with classic preschool
- Agents global/local
- Disney!
- Mostly preschool Toy driven shows! (less school kids)

Geography of Global Licensing Market 150,8 B $



Sources : EPM Communication, 2011

A $31,65 billion European Market



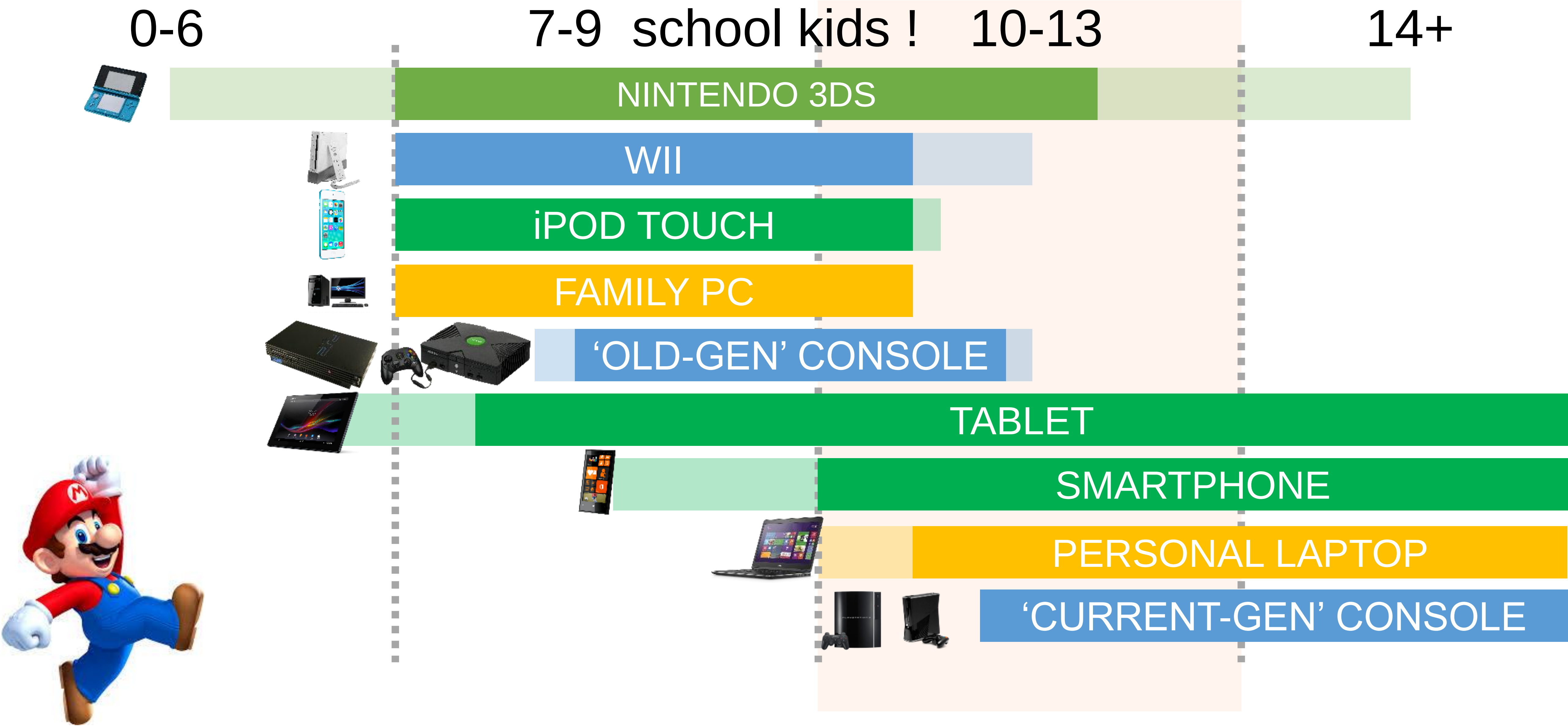
Sources : The Licensing Letter, 2011

AND GAMES?! Immersive learning through play

Hardware adoptions / “Tablets revolution“

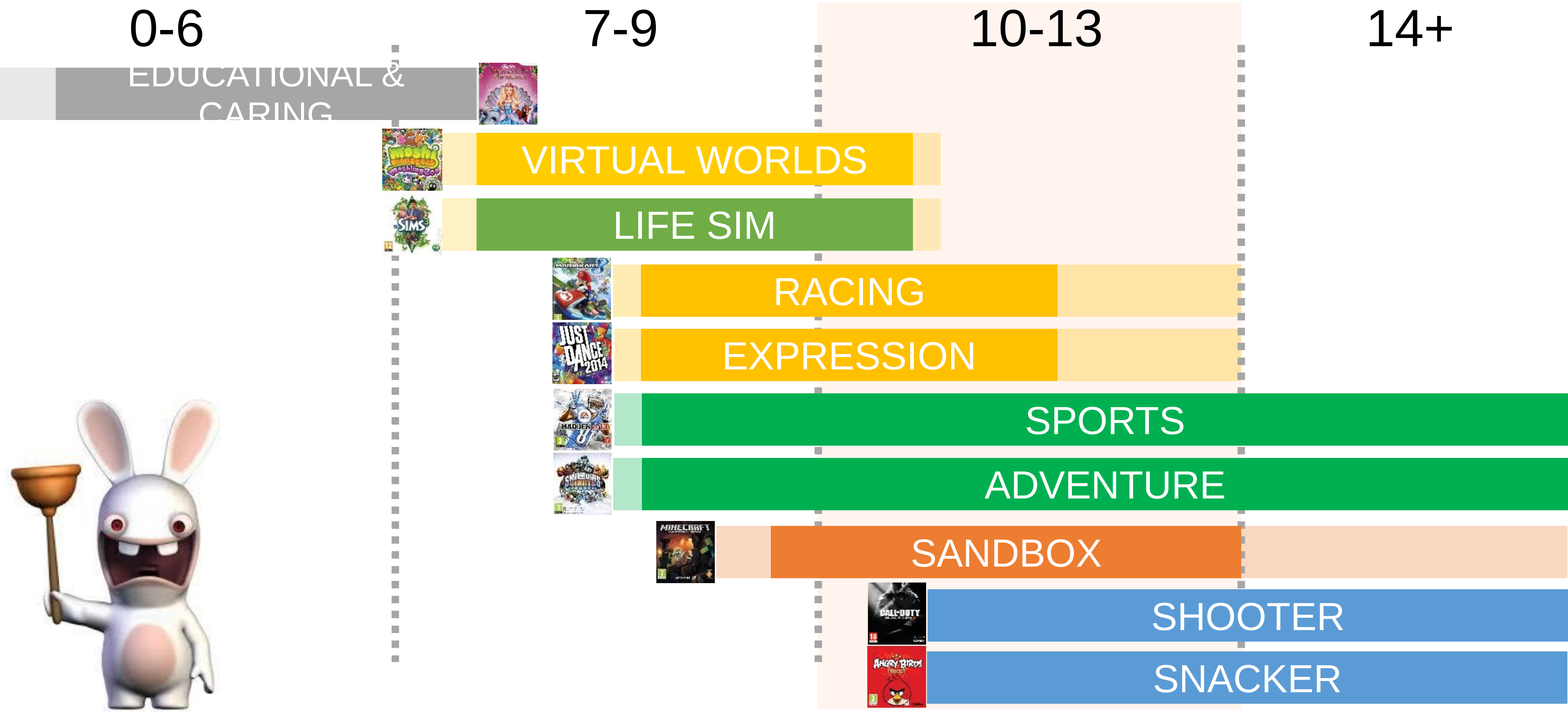
source

8-13 | GAME VISION & BAROMETER 2014 | 2013



“Software” adoption's phases
Serious games (diversity), School, Google education

source
8-13 | GAME VISION | 2013



Apps world for kids?!

Some good specialists – free, premium, freemium

And „major giants players“ like Rovio (Angry birds):

Industry shifts: The gold rush!

Total Active Apps: 1,561,851 (03/2015), Games submissions in 02/2015: 11,405 (407 every day!)

Most Popular App Categories

1.) Games (334,752)
2.) Business (158,258)
3.) Education (155,724)
4.) Lifestyle (129,833)
5.) Entertainment (105,838)

3 challenges 1.) Discoverability: Skyrocketing user acquisition costs
2.) Monetization: premium game market disappeared, winner takes it all + **“no money” in kids apps**
3.) COPPA (children’s – under 12 - online privacy protection act)!

Rovio’s Answers: breakout IP through games, leverage spin-offs and brand collaborations, publish 3rd party games, aim for a variety of target audiences, built a robust CPL business as a hedge against volability,
built a media unit so they can **control** the stories being told.

360°: games apps, TV series, Books/comics, big movie!

Distribution approach: Traditional (25 TV partners, Home entertainment & Connected platflorms) + own channel TOON.TV (**4billion views in 20 months**,15‘ and 5 videos per session, 50/50 mobile/tablet, **30% kids** / 30% teens / 40% adults)

EXAMPLE : KIDS TV IN FRANCE
Strong through legal obligation (quotas, TV licence, film funds…)

Canal+ group

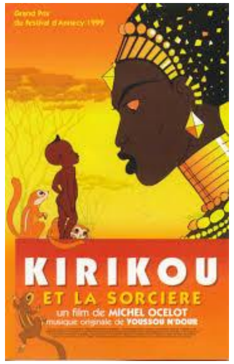
Disney group

TBS group

Lagardère group

Viacom group

Politically (law) forbidden :



ANIMATION IN FRANCE

ANIMATED MOVIES (CNC + TV windows)

Annual average of 28.7m admissions (2010-2014) to animation films in France (14% of all admissions - highest in Europe i.e. Gross Box office €1.3b)

4m for french animated films & 3m for other Eurorean + Average 5.6m to French animation film in the world

An average of 9.4 films per year, highest production capacity in the European Union.

But no French production has entered the Top 10 of animation films in 2014 by admissions in the country, the first national being Arthur et la guerre des deux mondes, which comes in 13th position. The film, produced in 2010, has accumulated over 4m admissions, 75% of them in France.

ANIMATION ON TV (Quotas)

Total volumes on animation broadcast on **TF1 (968)**, France 2(20), **France 3 (1089)**, Canal+ (222), **France 5 (1027)**, M6 (464)

Origins: 1.671h French, 1.296h US, 525h European, 473h others

ANIMATED TV SERIES

Around 450 hours animation produced in France - 60 series

Very diverse. Franco-french and international coproductions

UK less productions / US high % US

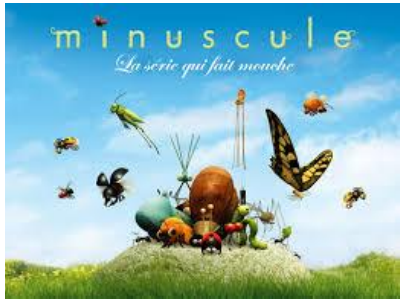
MANY ANIMATION PRODUCTION COMPANIES COPRODUCING

Folimage
Teamto
Gaumont
Cyber Group
Les films de l'Arlequin
Les Armateurs
Studio100
Millimages
2 minutes
Blue Spirit
Cottonwood Media
Dandeloo
Futurikon
GO-N
Je suis bien content
La station animation
Sacrebleu
Samka
Vivement Lundi!.............



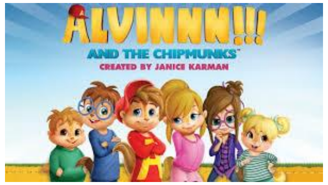





TV + CNC + Regional fund + tax credit > 60% Budget

French distributors (MG & 10-20%)



PGS

Specialist, commercial

Method: Iron man (FTV), Little prince (FTV / WDR 8M€!!) & Ladybug (**ZacToon** / Toei for TF1/Disney)

Djungle bunch (**TAT** for FTV), Alvin & Chipmunks

MILLIMAGES

Not only distributor but also studio, „charming“quality evergreen mostly preschool,

1 or 2 series/year

„Bestsellers“: Zoolane (100k€ ep, 24% CBeeBies (= max!), FTV, ZDF

Mouk (62x11‘, 6,2Mio€, France = 60% FTV/CNC) + Disney = 40% UK

Didou (sold successively -!-to ITV/BBC/NICK in UK!)

Didou

MOUK

SUPER RIGHTS

MEDIATOON

AWOL

TF1 INTERNATIONAL

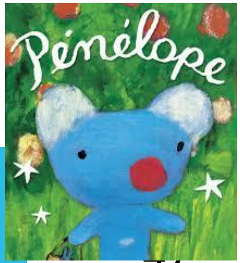
NEWEN

PLANET NEMO / ANKAMA

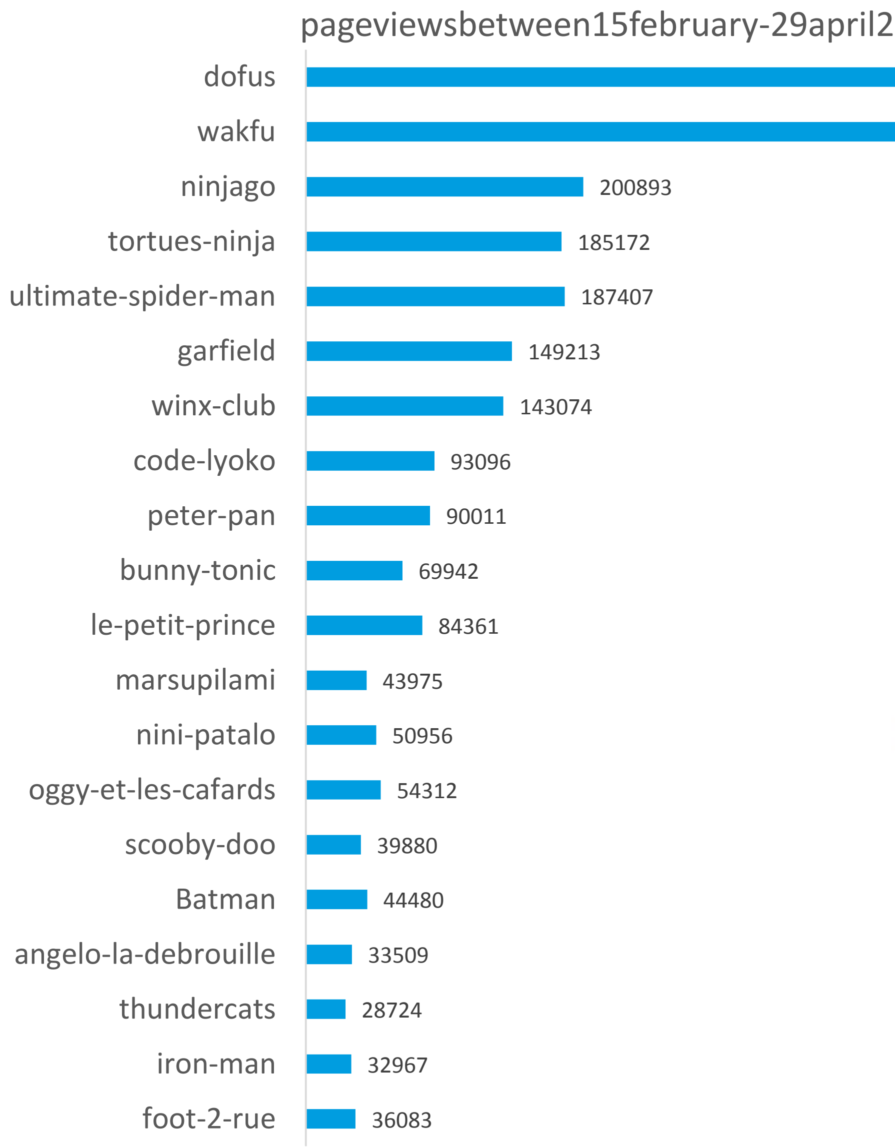
Specialist of Asia. Struggled and bought by ANKAMA.

(Bali, Mila, Manon, Petit lapin blanc,

Penelope, Big Idea (FTV, BBC, SVT)



Top 20 characters on F3.fr / School kids



EXAMPLE : BBC CHILDREN IN THE UK
CBBC and CbeeBies, increasingly digital

Why do we need iPlay?

The big audience challenges

Breadth	Retention	Affinity
Help kids and parents find our content more easily	Ensure kids stay with us - retain their time and attention	Remain relevant to kids and parents - retain their affection

BBC

Police Commissioner: "Hate crimes in rapid rise"

Childline anxiety calls spike as children express fears over global events

Almost two-thirds of children worry 'all the time'

In recent times children around the world have been exposed to an overwhelming increase in reports of **war**, **natural catastrophe, racism, gender intolerance** and a **rise in hate crime**. For children trying to make sense of the world these global events can be confusing and scary.

Sensational headlines, 24/7 news reporting, access to smartphones and social media mean that exposure to complex issues is increasing, promoting at best confusion and at worst fear among children and their families. Reports are also escalating about the levels of anxiety that children are experiencing in terms of bullying, self-image etc.

Childline anxiety calls spike as children express fears over global events

Almost two-thirds of children worry 'all the time’

Children are 'more likely to be bullied online than in the playground’

MEDIA LITERACY

Do school kids . . .

- Know how to spot **fake news**?
- Know how to respond to nasty comments online or more serious **threats**?
- Understand the **consequences** of what they post on social media?
- Know their **digital rights**?

DIGITAL RESILIENCE

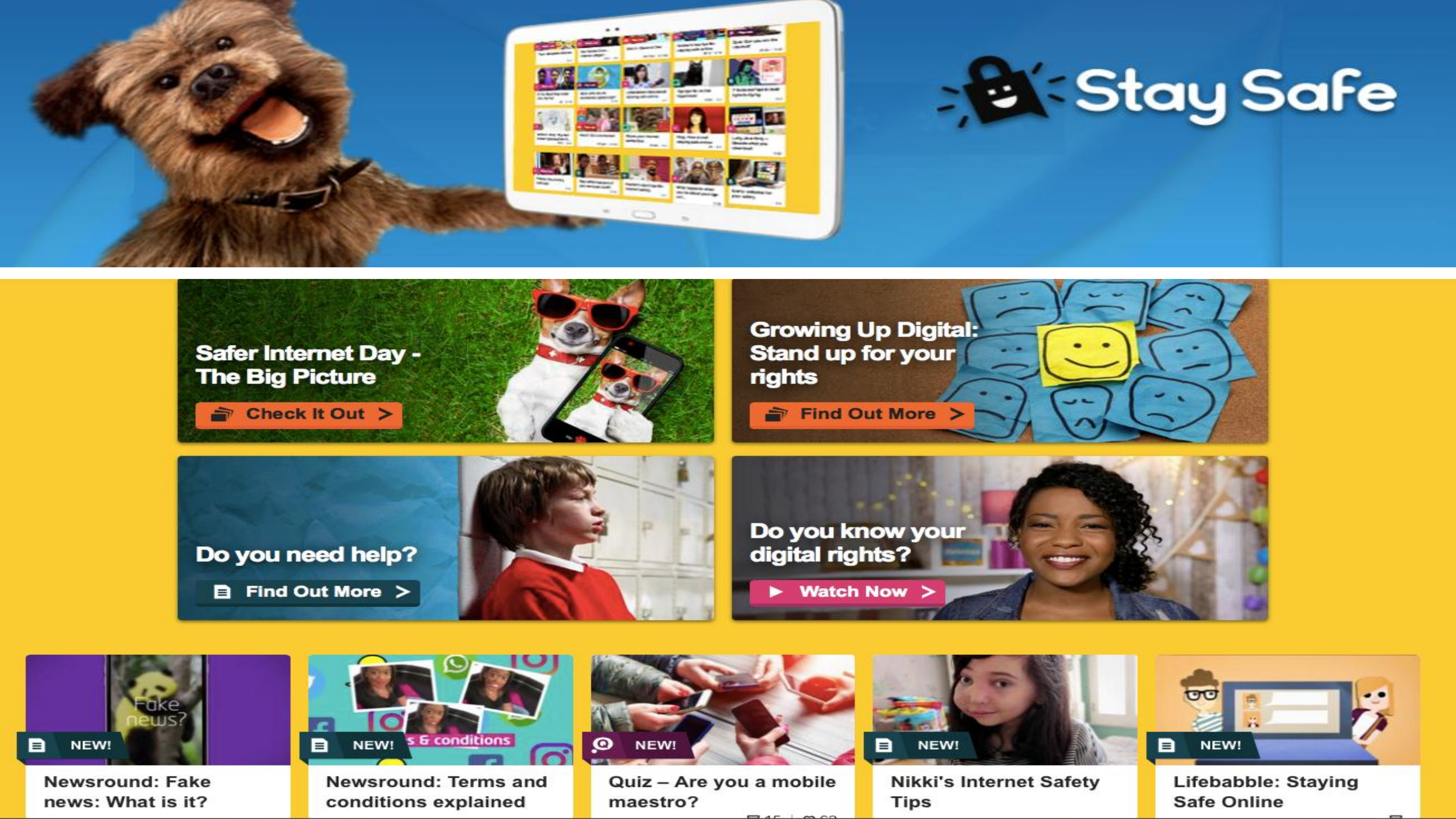
Internet Kids need to

understand when they are at risk online,

know what to do to seek help,

learn from experience

recover when things go wrong.


Stay Safe
Safer Internet Day - The Big Picture
Check It Out >
Growing Up Digital: Stand up for your rights
Find Out More >
Do you need help?
Find Out More >
Do you know your digital rights?
Watch Now >
Fake news?
NEW!
Newsround: Fake news: What is it?
s & conditions
NEW!
Newsround: Terms and conditions explained
NEW!
Quiz – Are you a mobile maestro?
NEW!
Nikki's Internet Safety Tips
NEW!
Lifebabble: Staying Safe Online

Further good luck & Teşekkür ederim

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