Public Service Broadcasting Report 2013: Annex

Information pack F: Children's Report

Research Document

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1 Executive summary

This report is an annex to Ofcom's 2013 *Public Service Broadcasting (PSB) Annual Report*, providing data and analysis on public service broadcasting for children. The report covers the period from 2006-2011[1], and considers the provision of children's programming by the PSBs, namely BBC One, BBC Two, ITV, Channel 4, Channel 5, CBeebies, CBBC and S4C. Delivery of PSB has been assessed in three areas: spend and broadcast hours; viewing; and parental opinion of PSB delivery. In order to put these findings in context, the report also looks at:

- market developments across the children's broadcasting sector;
- provision by the commercial children's channels;
- the impact of an increasingly multi-media landscape on children's attitudes to and consumption of television content; and
- where possible, it takes account of the analysis and historical data (1998 to 2006) published in Ofcom's report *The Future of Children's Television Programming* (2007).

The changing market context

There have been a number of changes in the children's broadcasting market during the period 2006-2011 that provide important context for our analysis.

- **Access to children's channels increased**: As digital switchover (DSO) neared completion, the proportion of children who had access to digital television grew to 95%[2]. Furthermore, the majority of households with children (65%) had access to pay TV[3].
- **Total hours of children's programming on the PSBs remained stable**: BBC One and Two taken together, Channel 4, and Channel 5 have all remained broadly stable, while ITV has scaled back provision by almost two-thirds (60%).
- **Total hours on the main five PSBs are set to decline**: In May 2012 the BBC announced its decision to stop broadcasting children's programming on BBC One and BBC Two after DSO completion, as these channels contributed only a fraction of the reach and viewing achieved by its dedicated children's channels, CBeebies and CBBC.[4]
- **Hours of first-run originations for the PSBs halved**: Each of the PSBs has seen a reduction in first-run originations; from a combined 1,584 hours in 2006 to 778 hours in 2011. CBeebies is the only PSB channel to have increased its first-run originated hours over the period, while CBBC first-run hours increased between 2007 and 2011.
- **Total hours on the commercial children's channels increased** as first-run originations decreased between 2010 and 2011.

[1] This period has been chosen to provide a 5 year trend of children's PSB provision.
[2] Source: Children's and parents' media use and attitudes survey (Ofcom, 2011).
[3] Technology tracker (Ofcom, Q1, 2012).
[4] http://downloads.bbc.co.uk/bbctrust/assets/files/pdf/review_report_research/dqf/final_conclusions.pdf p.12

Additionally, there have been a number of interesting developments, including the requirement under the Digital Economy Act for Channel 4 to provide relevant media content for 14-19 year-olds, which could lead to increased content for this traditionally under-served age group.

There is also some indication that the commercial children's channels increased spend year on year on first-run originations, which could help provide greater choice of UK programmes[5].

How children's viewing has changed

It is not just the children's TV market that has changed; there have also been some notable shifts in children's viewing habits, particularly among older children.

The C*hildren's media use and attitudes* research (Ofcom, 2011) among 5-15s showed that:

- Television continues to play an important role in the lives of all children, although this is more pronounced for younger children.
- Watching TV was still the most frequently undertaken daily media activity for all age groups, and the television was the device most likely to be missed by children. However, the internet and mobile phones have become increasingly important to 12-15 year-olds, both in terms of time spent and the importance placed on the device.

BARB viewing data for children aged 4-15 shows that:

- Children spent 17 hours per week watching television in 2011.
- Just over two-thirds of children's TV viewing time in 2011 was spent watching content other than children's programming (referred to as 'adult airtime' in this report).[6] This proportion was higher for older children (80% for 10-15 year-olds).
- Children spent less than half of their time watching the PSB channels (46%), with more than half (53%) of all viewing in 2011 spent on the commercial multichannels.
- In 2011, the majority of time children spent watching children's programmes was on the commercial children's channels (59%).
- Viewing to children's programmes on the main five PSB channels decreased from 20% in 2006 to 7% in 2011. This is in the context of a decline in children's programming on the main PSBs, and increased choice of channels available on the Freeview and pay-TV platforms.
- With the completion of DSO, the availability of CBeebies and CBBC has increased, as has the proportion of time spent watching children's programming on these channels, rising from 23% in 2006 to around one third (34%) in 2011.
- In 2011 pre-school was the most watched type of children's programming, representing 30% of viewing to children's programming.[7] It was followed by animation (27%) and drama (20%). Factual represented just 6% of viewing to

[5] Source: COBA 2012 Economic Impact Report [http://coba.org.uk/coba-latest/coba-latest/2012-economic-impact-report].
[6] Programmes aired during adult airtime is defined as all airtime excluding programming on dedicated children's channels and children's programming slots on the main five PSB channels.
[7] Across all children's channels and slots on the PSBs and commercial children's channels.

children's programmes. This pattern varied by age; younger children tended to watch more pre-school, and older children more drama.

- According to analysis by Attentional research agency, children's viewing indicated a preference for UK-based[8] children's programming. While UK-originated content represented just 20% of total hours of children's programming on air in 2011, it represented almost half (45%) of the time children spent watching children's content.

The views of parents

Ofcom's research with parents shows that children's PSB continues to be valued by the majority of parents. In 2011, 81% of parents/carers[9] rated children's PSB as important.

In terms of delivery, CBBC and CBeebies scored highly on providing a wide range of high-quality UK-made programmes for children (81% and 71% of parents respectively). These results contrasted with lower scores for BBC One and Channel 5 (53% and 45% respectively).

Children's PSB provision in spend, hours and range

This part of the report considers PSB spend, broadcast hours, and range of programming. (Note: all spend figures are stated in 2012 prices).[10] Using these measures, this report has identified the following changes in children's PSB provision between 2006 and 2011:

Less money

While total children's hours have remained relatively stable, total spend by the PSBs decreased in real terms; from £136m in 2006 to £106m in 2011. The decrease was mainly due to a reduction by ITV, which scaled back producing original children's programming and focused predominantly on repeats for CITV, its dedicated children's channel. However, there was an increase in spending by the BBC; from £88m in 2006 to £102m in 2011.

- The main 2013 PSB Annual Report, which includes 2012 figures, shows that spend on total children's programming further declined; by 13% year on year to £92m. In 2012 spend by the BBC decreased 14% year on year to £88m, while the commercial PSBs saw an increase of 21%, although from a small base (from £3.4m to £4.2m).

- The decline in BBC spend is likely to be a result of late commissioning of programmes in the financial year, not captured in the PSB Annual Report which reports by calendar year.

Since 2006, PSB spend on children's first-run originated programmes has dropped by 17%, to £91m in 2011. This is driven by a 93% decrease by the commercial PSBs taken as a group (ITV/C4/C5) from £33m to £2m. The BBC, however, increased spend by 15% over the same period, from £77m to £89m.

In 2011, of all PSB spend on first-run originated content, the BBC contributed 98%, making it overwhelmingly the main investor in new children's content across the PSBs.

[8] UK programmes include both *new* and *repeated* UK programming, whereas analysis elsewhere in the report the focus is on *new* UK programming only, described as first-run originated content. Also, Attentional data is sourced from BARB whereas Ofcom's internal analysis is based on broadcaster returns.
[9] Source: Ofcom's PSB Tracker 2011 among parents/carers whose children watch children's programming.
[10] The data and information expressed in this report have been adjusted for inflation. It is important to adjust for inflation when comparing nominal data at different points in time because with inflation, increases in nominal figures may simply reflect higher prices rather than increased production or purchasing power. We have used the 2012 Retail Price Index (RPI) to maintain consistency with the figures published in the main 2013 PSB Annual Report.

Decrease in hours of first-run originations and increase in repeats

While the total number of hours of PSB children's content remained broadly similar between 2006 and 2011 (about 12,500 hours), the proportion of those hours that were repeats increased as first-run originations dropped. In 2011, 91% of children's content across the PSB channels was repeats, compared to 84% in 2006.

First-run originated hours on the PSB channels more than halved (51%) from 1,584 in 2006 to 778 in 2011. This drop was driven by decreases by all the PSBs. The BBC saw a collective drop of 46% across its channels, whereas ITV decreased by 61% to 61 hours and Channel 5 dropped by 85% to 22 hours.

However, CBeebies almost doubled its first-run originations; from 92 hours in 2006 to 137 hours in 2011 (although, as indicated in the main PSB Annual Report, this has dropped back to 103 hours in 2012). CBBC hours declined sharply from 2006 to 2007, but between 2007 and 2011 hours they increased at a compound annual growth rate of 27%, to 421 hours in 2011 (and increased further in 2012 to 435 hours).

Continuing decline in hours of first-run originated PSB drama and factual content

Taking the PSBs as a whole, each genre, with the exception of pre-school, has seen a decline in first-run originated hours between 2006 and 2011.

Since 2006 drama output declined by just over a third (36%) while factual programming declined by two-thirds (63%). Only 66 hours of first-run originated drama content were broadcast by the PSBs in 2011, entirely by the BBC. Across the PSBs, the BBC was also the only producer of children's news, and overwhelmingly the main provider of factual programming; ITV/ITV Breakfast contributed only one hour of the 197 hours of first-run factual programming in 2011.

The reduction of first-run originated drama and factual content is part of a longer trend identified as problematic in Ofcom's 2007 report *The Future of Children's Television.*

First-run originated entertainment also fell by two-thirds (66%) from 2006-2011. In 2006 entertainment made up 39% of children's first-run hours by the PSB channels. In 2007 this fell to 27%, after which there was a levelling-off, and in 2011 it remained at 27%.

A potential shift towards fewer first-run originations at a higher cost

Between 2006 and 2011, the BBC's cost per hour on first-run originations increased from £61k in 2006 to £128k per hour in 2011. This is due to a change of strategy over this period where the BBC changed the genre mix of programming to concentrate on fewer, bigger and better programmes.

Increase in programming on dedicated children's channels

There has been a migration by the BBC to showing new programming on CBeebies and CBBC – which are the only dedicated children's channels with a PSB remit.

In 2011, there were also 27 commercial children's channels on air, including CITV on free-to-air, and a range of channels from The Turner Group, The Walt Disney Company and Viacom available on pay-TV platforms.

From 2006 to 2011, total hours on the commercial children's channels increased by 32% to 104,030 hours, as first-run originations decreased by 48% to 340 hours.[11] Overall, 98% of content in 2011 was repeats, compared to 95% in 2006.

Total spend by the commercial children's channels in 2011 was £53m, an 11% increase in real terms on the previous year, but a 4% reduction since 2006.

Ofcom does not measure spend on first-run originations by the commercial children's channels. However, data from COBA, the industry body for commercial broadcasters in the UK, suggests there was a year-on-year increase in spend on first-run originated commissions.[12]

S4C

The number of hours of first-run Welsh-language children's programming increased by 8% from 2010 to 2011.

S4C's dedicated children's slot *Cyw* specialises in programming for pre-school children. In 2010 S4C branched out to provide programming for older children, commissioning programmes aimed at 7-15 year-olds. *Stwnsh* offers a range of programming aimed at older children and teenagers, including titles such as *Gwylltio* and *Y Sqwad*.

In July 2013, S4C announced that it would allocate £4m over a four-year period to invest in digital projects aimed at children and young adults.[13]

Summary

In summary, the annex shows that despite increased time online, television remains the most popular media activity for children. The hours of PSB first-run originated children's programming halved between 2006 and 2011, while spend dropped by 17% in real terms; with drama and factual programmes, among other genres, seeing decreases. The main five PSBs' share of viewing of children's programming decreased from 20% to 7%. However, CBeebies and CBBC increased their share to 34%. And parents continue to place high value on the delivery of children's programming by these two dedicated children's channels. Children's appetite for UK-made programming is demonstrated by the figures: while 20% of total children's hours, across all channels, is UK-made content, this constituted 45% of time spent watching children's programming.

[11] These figures are based on hours of first-run in-house and commissioned productions. They exclude co-productions or repeats of UK programmes shown first by other broadcasters (i.e. secondary rights content). Includes channels by Baby Network Ltd, ITV plc, Nickelodeon UK Limited, The Walt Disney Company, Turner Broadcasting and BFTV Limited. Excludes BBC digital channels and CSC Media Group Limited.
[12] Source: COBA 2012 Economic Impact Report. These figures are based on UK in-house and external commissions for channels that are members of COBA. The report also shows additional spend on co-productions and secondary rights in 2011.
[13] http://www.s4c.co.uk/abouts4c/annualreport/acrobats/s4c-annual-report-2012.pdf

2 Introduction

Purpose of this report

This report is an annex to Ofcom's 2013 *PSB Annual Report*, providing data and analysis on public service broadcasting for children. The report covers the period from 2006-2011[14], and considers the provision of children's programming by the public service broadcasters (PSBs). For the purposes of this report, delivery of PSB has been defined by assessing three areas: PSB spend and broadcast hours; viewing; and parental opinion of PSB delivery.

In order to put these findings in context the report also looks at:

- market developments across the children's broadcasting sector;
- provision by the commercial children's channels;
- the impact on viewing behaviour of an increasingly multi-media landscape; and
- where possible, takes account of analysis and historical data from 1998 to 2006 published in Ofcom's report *The Future of Children's Television Programming* (2007).

The *PSB Annual Report* provides an evidence base which allows Ofcom to consider the extent to which the PSBs have delivered the PSB purposes.[15] There have been a number of important changes in recent years in the way PSBs and the broader market are providing children's content, as well as changes in children's media consumption. We have therefore undertaken more detailed analysis in this area, to understand the impact of these changes.

Ofcom's duties relating to PSB and children's programming

Children's programming is programming that has been specifically produced for and targeted at children. This report looks at the state of children's PSB programming in the UK.

Ofcom has a duty to assess the designated public service broadcasters, taken together, in terms of their delivery of the public service purposes as set out in the Communications Act. These purposes can be summarised as[16]:

- to deal with a wide range of subjects;
- to cater for the widest possible range of audiences – across different times of day and through different types of programme; and
- to maintain high standards of programme-making.

In relation to children's programming, Ofcom is required to consider whether the PSB services, taken together, include what appears to Ofcom to be "a suitable quantity and range of high quality and original programmes for children and young people." (s264(6)(h)[17])

[14] This period has been chosen to provide a five-year trend of children's PSB provision.
[15] Ofcom is required under the Communications Act to assess delivery of PSB by carrying out a review every five years. The Department for Culture, Media and Sport has announced its intention to amend this duty so that a review would only be conducted at the discretion of the Secretary of State and has put draft legislation to make this amendment before Parliament. For more information see https://www.gov.uk/government/consultations/changes-to-ofcoms-statutory-duties-and-functions
[16] See section 264 of the Communications Act for the full wording and more detail on these.

The designated public service broadcasters are: the BBC, including its children's channels CBeebies and CBBC; ITV, although not ITV's designated children's channel CITV[18]; ITV Breakfast; Channel 4; Channel 5 and S4C[19].

The delivery of children's programming varies by PSB broadcaster.

a) The BBC Charter and Agreement defines CBeebies as 'a channel providing a range of programming to educate and entertain very young children' and CBBC as 'a mixed-schedule channel for pre-teen children'. The BBC Trust sets out the channels' remit and obligations, including any targets, in more detail in their respective service licenses.

b) S4C is a wholly Welsh-language channel that offers a range of programmes for younger and older children as well as programmes for teenagers.

c) The Communications Act 2003 brought in a change to statutory requirements in the provision of children's programming by the commercial PSBs. There are no longer specific requirements that an individual commercial PSB fulfils a set number of hours of children's programming. Instead, Ofcom is required to consider whether the PSB services, taken together, include what appears to Ofcom to be "a suitable quantity and range of high quality and original programmes for children and young people." However, Ofcom has not been given powers to direct PSBs individually or collectively to broadcast a suitable quantity and range of high quality original programmes for children and young people.

d) Channel 4's public service remit requires it to provide programming which "makes a significant contribution to meeting the need for the licensed public service channels to include programmes of an educational nature and other programmes of educative value." Additionally, the DEA 2010 introduced a particular duty for Channel 4 Corporation to provide media content for older children and younger adults.

[17] Since the 2003 Communications Act, Ofcom is no longer responsible for ensuring that an individual commercial PSB fulfils a set number of hours of children's programming. It is for PSBs themselves to decide what to deliver in terms of children's programming.
[18] In 2007 ITV reduced the amount of children's programming on its main channel, but continued to show programmes on its dedicated children's channel CITV which was launched in 2006. Since CITV does not have a public service remit, it is not included in analysis of PSB provision in children's channels.
[19] The Welsh Authority has the statutory responsibility to provide S4C Digidol (digital) services for viewers in Wales.

3 Children's television – the changing market context

This section describes how the availability of children's television programming has changed between 2006 and 2011. It considers the availability of children's programming on the main five PSB channels (BBC One, BBC Two, ITV, Channel 4 and Channel 5); the dedicated BBC children's channels (CBeebies and CBBC); and the commercial children's channels.

Between 2006 and 2011 the children's offering on the main PSBs decreased greatly

a) Between 2006 and 2011 the children's offering on the main PSBs decreased.

b) The drop was driven by reductions by ITV when it scaled back children's programming on its main channel in 2007. Since 2010, ITV's contribution in terms of first-run investment and hours on the main channel has been negligible. ITV/ITV Breakfast's provision of first-run originations has dropped from 158 hours in 2006 to 61 hours in 2011.

c) Between 2006 and 2011 BBC One and BBC Two increased total hours of children's programming; but within this, reduced the hours of first-run originations from 563 to 137 hours.

   i) The overall reduction of children's programming on the main PSBs is set to continue, due to the BBC's recent decision to no longer air children's programming on BBC One and BBC Two. In May 2012, the BBC announced that following digital switchover completion in October 2012,[20] it would no longer air children's programming on BBC One and BBC Two, as these channels contributed only a small fraction of the reach and viewing achieved by its dedicated children's channels, CBeebies and CBBC. The BBC now delivers all of its children's provision via these two channels.

   ii) The BBC's decision to stop children's programmes on BBC One and BBC Two was made in the context of a clear commitment to children's content indicated by its decision in 2009 to protect spend on children's programming and to allocate an additional c£26m over 2009-2012. In *Delivering Quality First (2011)*, which outlined the BBC's plan for how it could best deliver the highest quality programmes and content to audiences until the end of the Charter in 2017, the BBC stated its intention to protect its increased children's UK originations budget from any reductions. (Note: The BBC Trust is currently undertaking its second service review of children's TV, due for publication in autumn 2013).[21]

d) By contrast, Channel 5's provision has remained stable over the period and it continues to air its 6:00am to 9:00am *Milkshake* slot for pre-schoolers. First-run hours, however, have fallen significantly; from 150 hours in 2006 to 22 hours in 2011.

e) Channel 4 continues to air some pre-school programming every morning on its main channel.

[20] http://downloads.bbc.co.uk/bbctrust/assets/files/pdf/review_report_research/dqf/final_conclusions.pdf p.12
[21] http://www.bbc.co.uk/bbctrust/news/press_releases/2013/childrens_services.html

PSB dedicated children's channels: CBeebies and CBBC

a) From 2006 to 2011, CBeebies continued to offer a range of programmes for very young children, and CBBC for children up to 12 years old. While the total hours broadcast remained stable over the period, hours of first-run originated programming decreased on CBBC (from 621 hours in 2006 to 421 hours in 2011), whereas hours on CBeebies increased from 92 to 137.

The BBC remains the main PSB provider of first-run children's programming

a) The BBC contributed around 90% of the PSBs' first-run originated programmes in 2011, compared to 80% in 2006.

b) The long-term trend paints a starker picture of change in provision; back in 1998 the BBC's first-run originated programmes represented just 37% of new UK programming shown by the PSBs.

The commercial children's channels have reduced their hours of first-run originations

a) Between 2006 and 2011 the number of commercial dedicated children's channels in the UK has remained relatively stable, at around 27. (This is against a long-term trend of large-scale growth in the number of commercial children's channels, from four channels in 1998).

b) Over this period, the growth area was in the number of free-to-air commercial children's channels. At the start of 2006 there were no free-to-air commercial children's channels; by 2011 there were six:

    i) ITV's dedicated children's channel, CITV, launched in 2006 offering programmes for children aged up to 11. The majority of its content has been archive programming. It commissioned very few new originated programmes between 2006 and 2011, and in 2010, CITV commissioned an animated series, its first for five years.

    ii) Between 2006 and 2011 six channels owned by CSC Media Group were launched (i.e. Pop, Tiny Pop, Tiny Pop +1, Pop Girl, Pop Girl +1, and Kix!).

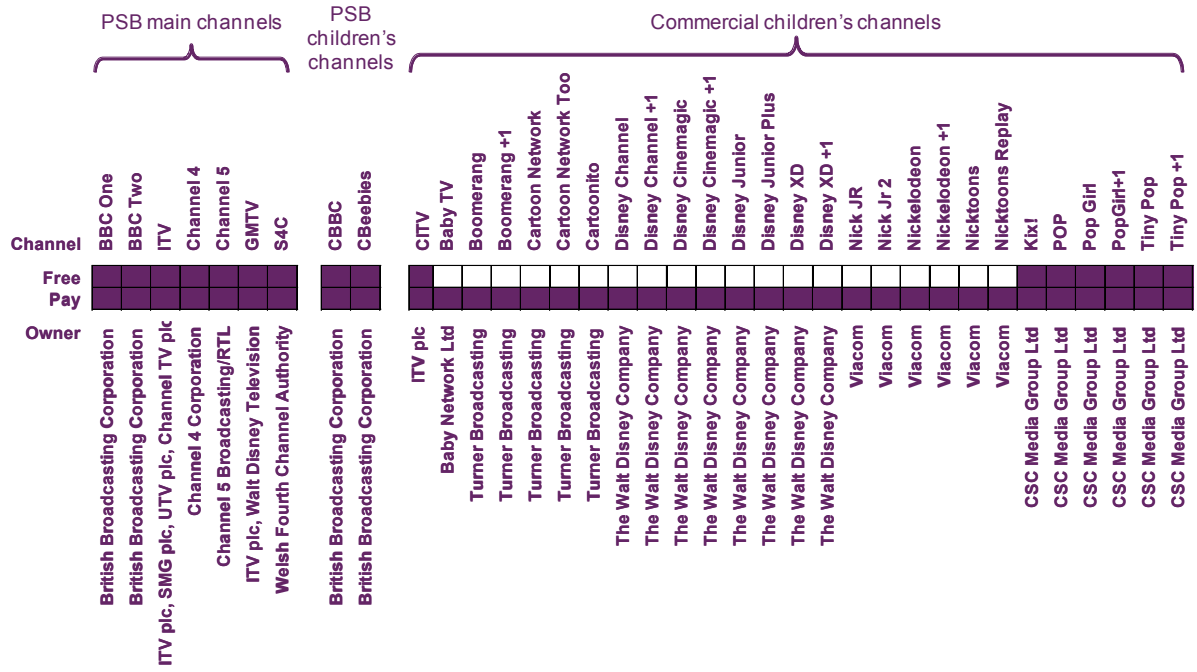
c) The majority of commercial children's channels continued to be offered on pay-TV platforms. Most are owned by three US-owned, global media companies: The Walt Disney Company, Turner Broadcasting, and Viacom. Over this period, the vast majority of programmes on these channels continued to be predominantly of US origin.

d) Ofcom data indicate a decrease in hours of first-run originated programmes aired by the commercial children's channels[22] from 654 in 2006 to 340 in 2011 (down 48%). But total hours are higher than in 2006; increasing by 32% from 78,933 hours to 104,030 hours.

[22] Includes Baby TV, Baby First TV, CITV, Nick Jr., Nick Jr. 2, Nickelodeon, Nicktoons TV, Disney Channel, Disney Cinemagic, Disney Junior, Disney XD, Boomerang, Cartoon Network UK and Cartoonito.

Figure 1 below summarises the availability of children's programming and channels in 2011 across the children's broadcasting sector.

Figure 1: Dedicated children's programmes by channel, by platform: 2011



Source: BARB 2011, all children 4-15.

4 Spend on children's programming

Key points

Total spend on children's programming in 2011 by the PSBs decreased by 22% in real terms compared to 2006, bringing the total to £106m.

The drop is driven by a large decrease by the commercial PSBs, which collectively decreased spend from £48m in 2006 to just £3m in 2011. By contrast, the BBC increased spend in real terms from £88m in 2006, to £102m in 2011.

Between 2006 and 2011, PSB spend on children's first-run originated programmes has dropped by 17% to £91m. This has been driven by a decline in spend by the commercial PSBs; from £33m in 2006 to £2m in 2011. Over the same period, BBC spend on children's programming has risen in real terms from £77m in 2006 to £89m in 2011.

The BBC's cost per hour for children's first-run originations doubled between 2006 and 2011, as it changed the genre mix of programming to concentrate on fewer, bigger and better programmes.

Total spend by the commercial children's channels on children's content stood at £53m in 2011, a 15% year-on-year increase in real terms.

To set PSB spend on children's programming in context, we open this section with an analysis of the PSBs' spend on all network programming, split by programme genre. We then look at PSB spend on total and first-run originated children's programming between 2006 and 2011. The section finishes with a brief snapshot of spend by the commercial children's channels[23].

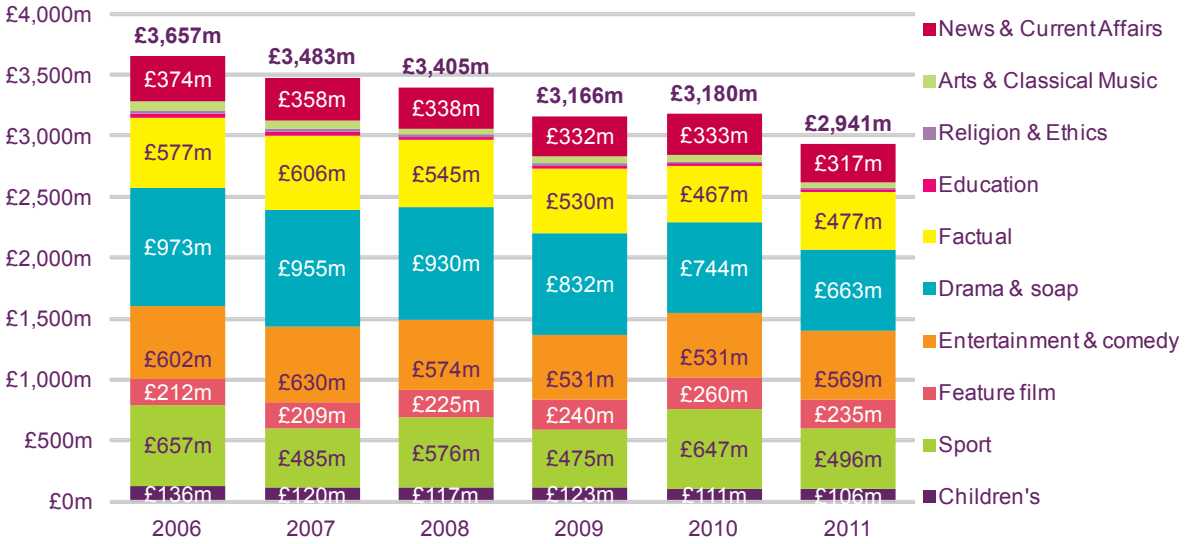
From 2006 to 2011 PSB spend on children's programming has declined at a greater rate than overall PSB spend

PSB spend on network programming has been gradually declining in real terms since 2006 at a compound annual growth rate (CAGR) of -4% to reach £2,941m in 2011 (see Figure 2). Over the same period, the children's genre experienced a decrease in spend at a CAGR of -5%, to reach £106m in 2011.

Spend by each of the PSB broadcasters varied over this period. BBC spend across all genre categories decreased by almost a fifth (19%), but as shown in Figure 3, spend on children's programming increased by almost a sixth (16%) to £102m in real terms.

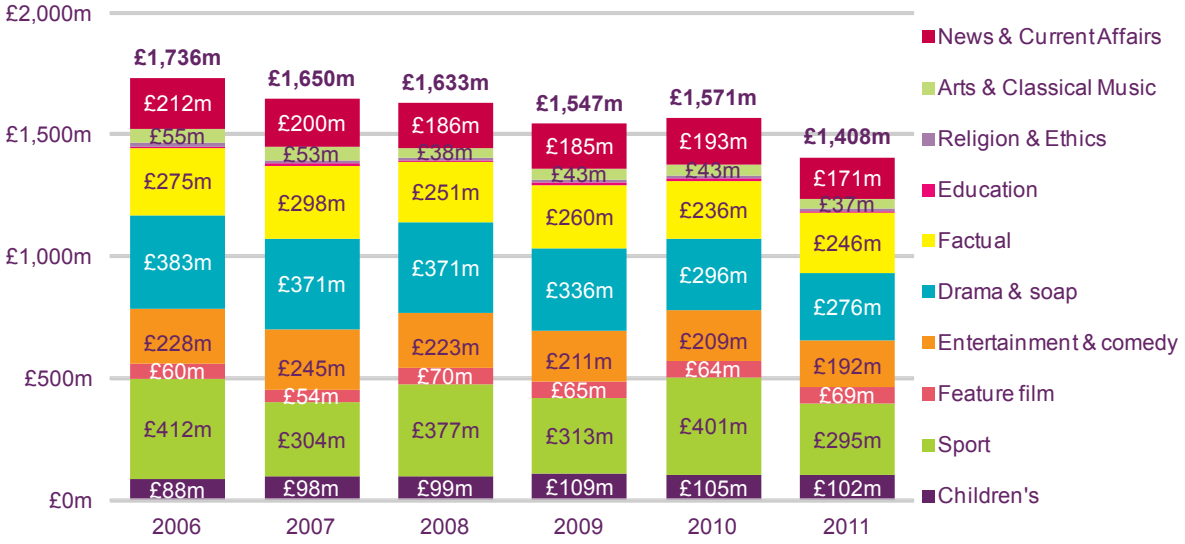
[23] Ofcom does not currently collect first-run spend data from the commercial children's channels as its powers do not extend to this level on the grounds that it is not proportionate for Ofcom to do so.

Figure 2: PSB network programme spend, by genre: all hours



Source: Ofcom/broadcasters. Note: figures are expressed in 2012 prices. Figures include PSB services: BBC One, BBC Two, BBC Three, BBC Four, CBBC, CBeebies, BBC News, BBC Parliament, ITV, ITV Breakfast, Channel 4 and Channel 5. The analysis does not include S4C, BBC Alba or BBC HD. Figures exclude nations/regions programming.

Figure 3: BBC network programme spend, by genre: all hours

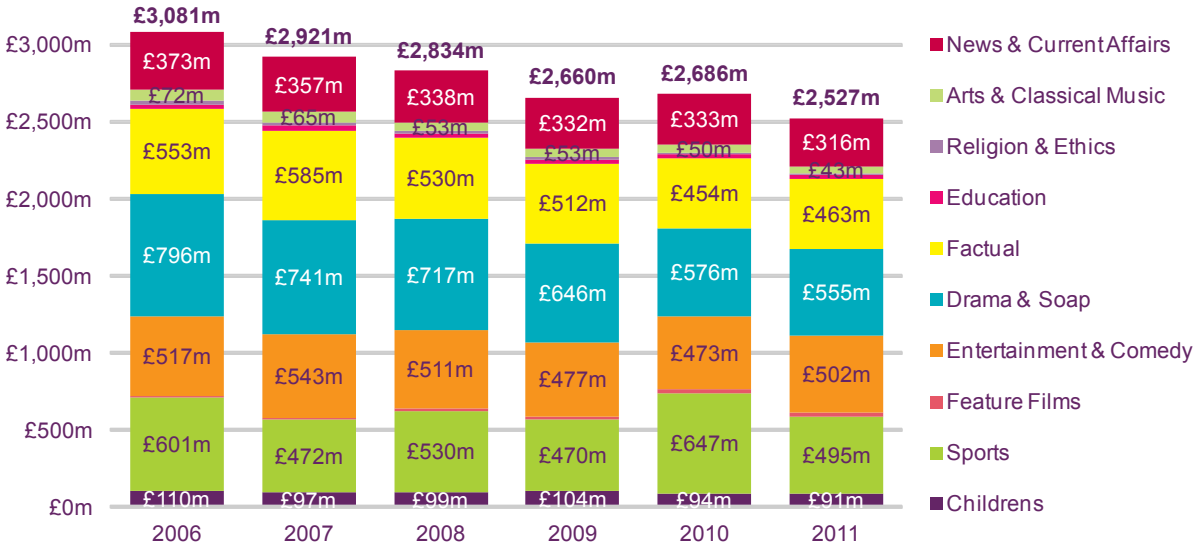


Source: Ofcom/broadcasters. Note: figures are expressed in 2012 prices. Figures include : BBC One , BBC Two, BBC Three, BBC Four, CBBC, CBeebies, BBC News, BBC Parliament. The analysis does not include S4C, BBC Alba or BBC HD. Figures exclude nations/regions programming.

PSB spend on first-run originated children's content declined at a greater rate than spend for all hours of children's programming

Figure 4 below shows that PSB spend on first-run originations declined by 18% in real terms between 2006 and 2011 to £2,527m. Over the same period, spend on first-run originated children's programming also dropped by a similar rate (-17%) to £91m in 2011.

Figure 4: PSB network programme spend, by genre: first-run originated hours



Source: Ofcom/broadcasters. Note: figures are expressed in 2012 prices. Figures include PSB services: BBC One, BBC Two, BBC Three, BBC Four, CBBC, CBeebies, BBC News, BBC Parliament, ITV, ITV Breakfast, Channel 4 and Channel 5. The analysis does not include S4C, BBC Alba or BBC HD. Figures exclude nations/regions programming

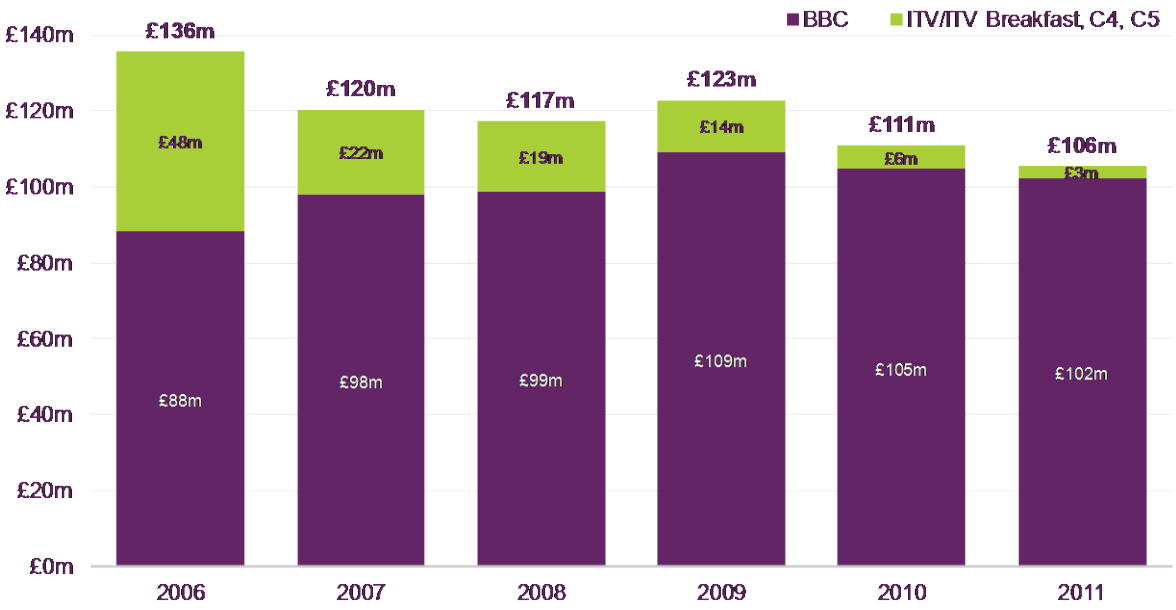
Commercial PSBs contributed only 3% of total spend on PSB children's programming in 2011

The drop in total spend on children's content in real terms since 2006 is driven by a large decrease by the commercial PSBs, which collectively decreased their spend from £48m in 2006 to just £3m in 2011. This decrease is mainly attributable to ITV substantially reducing its investment in children's programming as it scaled back its offering on its main channel.

The commercial PSBs' financial contribution to children's programming has been gradually decreasing over a number of years. In 2006 the PSBs collectively contributed over a third (35%) of all PSB spend on children's programming, compared to just 3% in 2011. To see the changing landscape of children's programming over the long term, see Figure 6.

By contrast, the BBC has increased spend in real terms; from £88m in 2006 to £102m in 2011. In 2011, the overwhelming majority of PSB spend on children's programming came from the BBC (97%).

Figure 5 PSB spend on children's genre, all hours: 2006-2011



Source: Ofcom/broadcasters. Note: figures are expressed in 2012 prices. ITV includes ITV Breakfast. BBC channels do not include BBC HD. CITV is excluded.

PSBs' total spending on children's programming in 2011 is 36% lower than in 1998
The long-term trend shown in Figure 6 more starkly depicts the decrease in spend by the commercial PSBs; from £89m in 1998 to £3m in 2011. Over the same period the BBC increased its spend from £75m to £102m.

The peaks in BBC spending between 2002 and 2004 are attributable to the launch of CBeebies and CBBC, in 2002, which stimulated increased investment in content to fill the schedules of these dedicated children's channels.

Figure 6: PSB spend on children's genre, all hours: 1998-2011

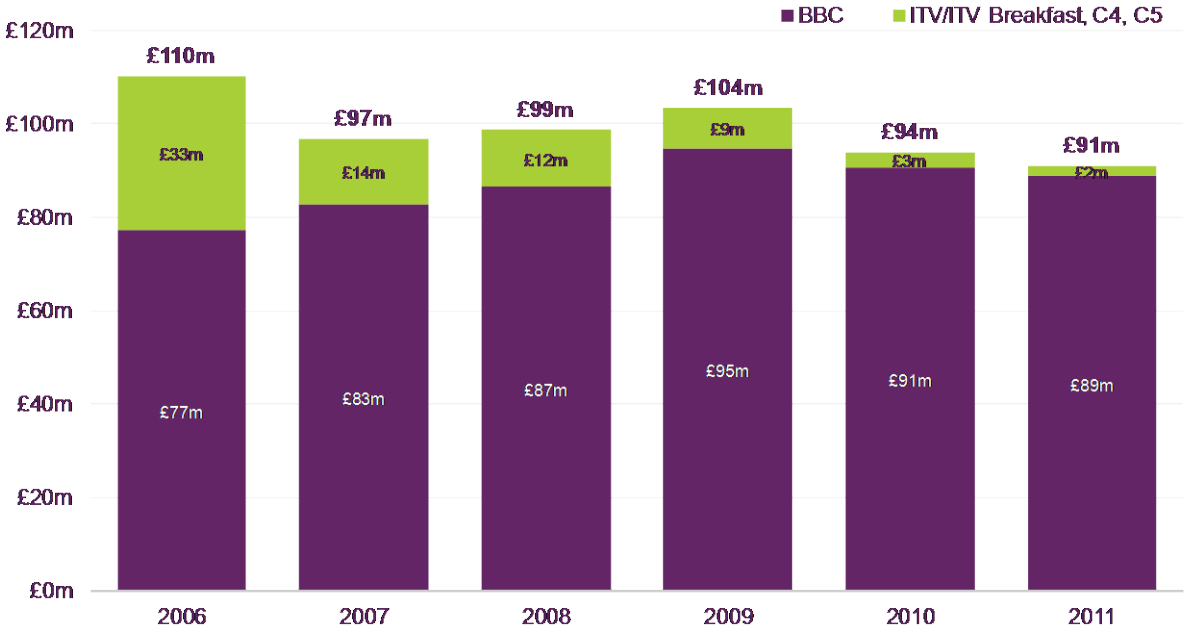
Source: Ofcom/broadcasters. Note: figures are expressed in 2012 prices. ITV includes ITV Breakfast. BBC channels do not include BBC HD. CITV is excluded.

Between 2006 and 2011, PSB spend on first-run originated programmes dropped by 17%

Investment in first-run originated programming mirrored the reduction in spend of all programming. Once again, the decline was driven by the commercial PSBs, which reduced spend on first-run children's content from £33m in 2006 to £2m in 2011. In contrast, the BBC increased its spend on first-run children's programming from £77m to £89m over the same period.

In 2011, PSB spend on first-run children's content represented 86% of total PSB spend on children's programming in that year.

Figure 7: PSB spend on children's programming, first-run originated hours: 2006-2011



Source: Ofcom/broadcasters. Note: figures are expressed in 2012 prices. ITV includes ITV Breakfast. BBC channels do not include BBC HD. CITV is excluded.

PSBs' spend on first-run originations dropped from £136m in 1998 to £91m in 2011

The long-term trend shown below clearly illustrates the large drop in spend by the commercial PSBs. Spend stood at £73m in 1998, declining by 97% to £2m in 2011. By contrast, the BBC increased first-run spend on children's content from £62m to £89m over the same period.

In 2011, the BBC contributed 98% of total first-run spend on children's programming, compared to just 46% in 1998.

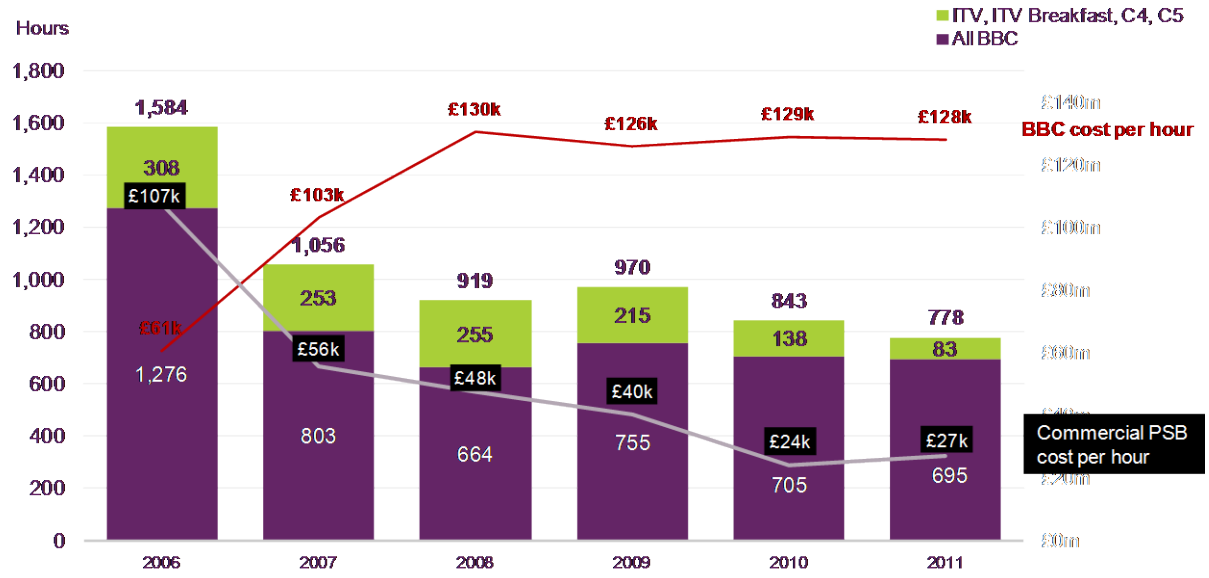
Figure 8: PSB spend on children's programming, first-run originated hours: 1998-2011

Source: Ofcom/broadcasters. Note: figures are expressed in 2012 prices. ITV includes ITV Breakfast. BBC channels do not include BBC HD. CITV is excluded.

The BBC's cost per hour for first-run originations doubled between 2006 and 2011 as the BBC tried to vary its genre offering of children's programming

While spend on first-run originated children's content increased between 2006 and 2011, the number of hours of this type of programming deceased. In 2011 the BBC cost-per-hour figure had almost doubled since 2006 (from £61k to £128k), which suggests that the BBC was spending more money on fewer productions over this period. This is in line with the BBC's *Putting Quality First*[24] and *Delivering Quality First*[25] initiatives, publicly announced in December 2010 and January 2011, with the aim of producing fewer programmes, but of higher quality, and therefore more expensive to produce.

Figure 9: PSB cost per hour, children's genre, first-run originated hours: 2006-2011



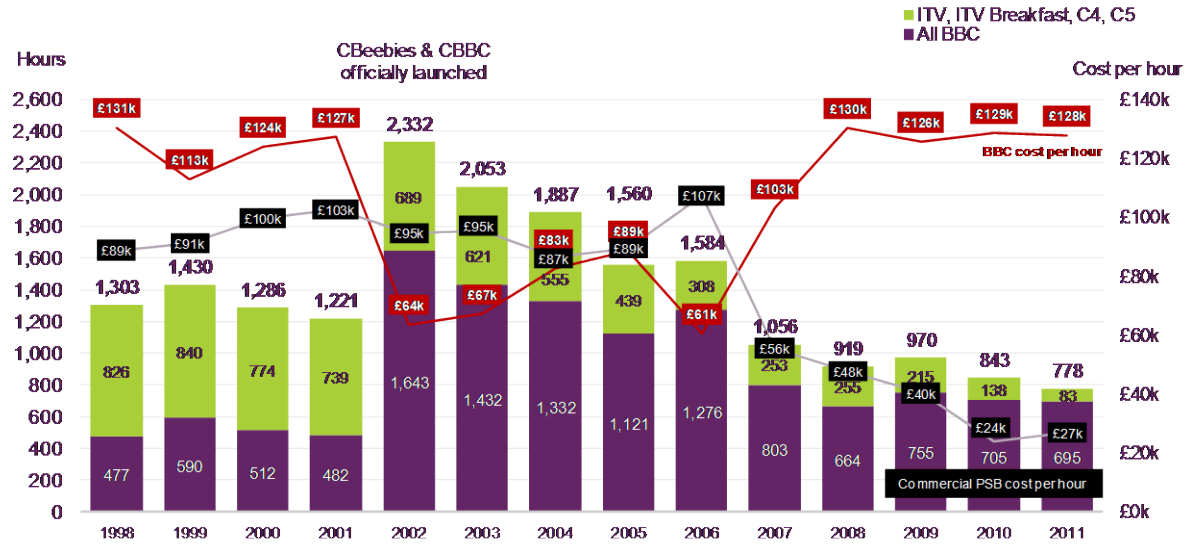
Source: Ofcom/broadcasters. Note: Spend is given in 2012 prices. Output and spend on the CITV channel is excluded.

[24] http://www.bbc.co.uk/bbctrust/assets/files/pdf/review_report_research/strategic_review/final_conclusions.pdf
[25] http://www.bbc.co.uk/pressoffice/pressreleases/stories/2011/01_january/13/delivering_quality_first.shtml

BBC cost per hour returns to the high levels seen in 1998

A comparison with 1998 levels of spend and hours shows that the BBC's 2011 cost per hour(£128k) had returned to its 1998 level (£131k). In contrast to this, cost per hour for the commercial PSBs in 2011 was 70% less than in 1998, and in 2010 it was the lowest it had ever been over the 13-year period.

Figure 10: PSB cost per hour on children's programming, first-run originated hours: 1998-2011



Source: Ofcom/broadcasters. Note: figures are expressed in 2012 prices. ITV includes ITV Breakfast. BBC channels do not include BBC HD. CITV is excluded.

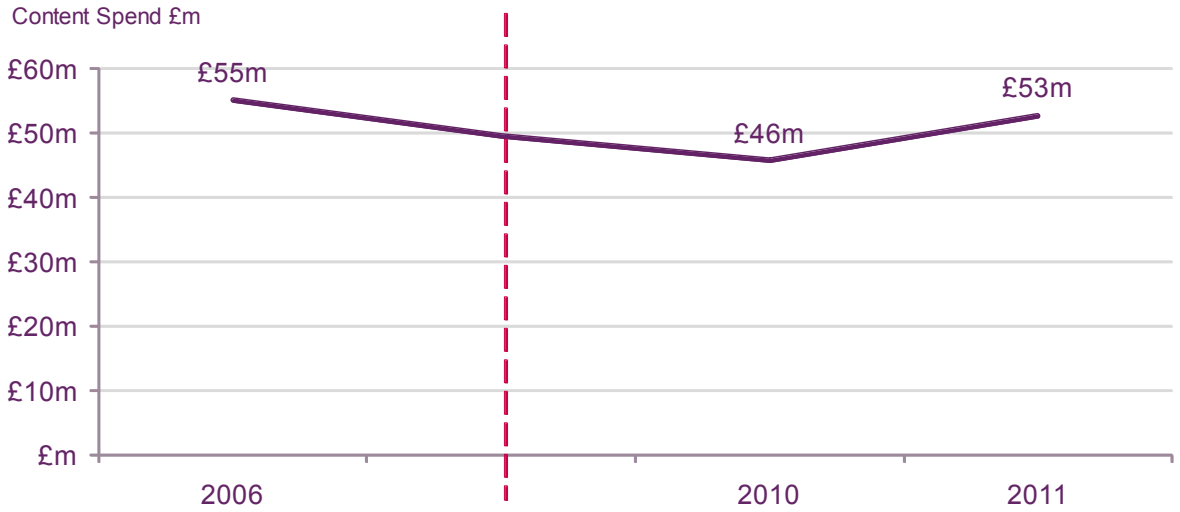
Commercial children's channels' total spend on children's content up 15% year on year

In 2011, Ofcom's broadcaster returns show that £53m[26] was spent on children's content across the commercial children's channels; up 15% on the previous year, but showing a 16% decline from 2006 in real terms.

We are unable to break this data down into spend on first-run originations, acquired programming or repeats as we do not collect these data for the commercial channels.

[26] As with the spend figures on the PSBs above, this data does not include so called 'deficit funding' such as investment from UK secondary rights.

Figure 11: Content spend by children's commercial multichannels: 2006 – 2011



Source: Ofcom/broadcasters. Figures expressed in 2012 prices. Note: Includes Baby TV, Baby First TV, CITV, Nick Jr., Nick Jr. 2, Nickelodeon, Nicktoons TV, Disney Channel, Disney Cinemagic, Disney Junior, Disney XD, Boomerang, Cartoon Network UK and Cartoonito.

Other industry sources reporting on children's programming include the *2012 Economic Impact Report* by COBA.[27]

While Ofcom's methodology for analysing UK children's content differs from that of COBA,[28] COBA's overall analysis suggests increased year-on-year spend on first-run originated content.

The COBA report suggests that, aided by the increase in advertising revenue between 2009 and 2011, the growth in spend over this period is due in part to broadcasters replenishing their stocks after spending cuts in 2009.

[27] COBA (the Commercial Broadcasters Association) is the industry body for commercial broadcasters who invest in the UK, independent of public funding or incentives. It represents multichannel broadcasters in the digital, cable and satellite TV sector.

[28] This third-party data is based on spend by COBA member, and does not include spend by CITV. The definition of spend differs from that used by Ofcom in a number of ways including – it is based on commissions not transmissions, it includes co production and secondary rights spend and is expressed in nominal not real terms.

5 Hours of children's programming

This section considers the number of hours of children's programming provided by the PSBs in terms of total and first-run originations between 2006 and 2011. It finishes with a snapshot of the hours offered by the commercial children's channels.

Summary of key points

Total hours of PSB children's programming increased slightly, from 12,336 hours in 2006 to 12,547 hours in 2011.

PSBs' hours of first-run originations halved; from 1,584 hours in 2006 to 778 hours in 2011.

Since 2007, around 90% of children's programmes on the PSBs has been repeated content.

Between 2006 and 2011, total hours on the commercial children's channels increased by 32%, as first-run originations decreased by 48%.

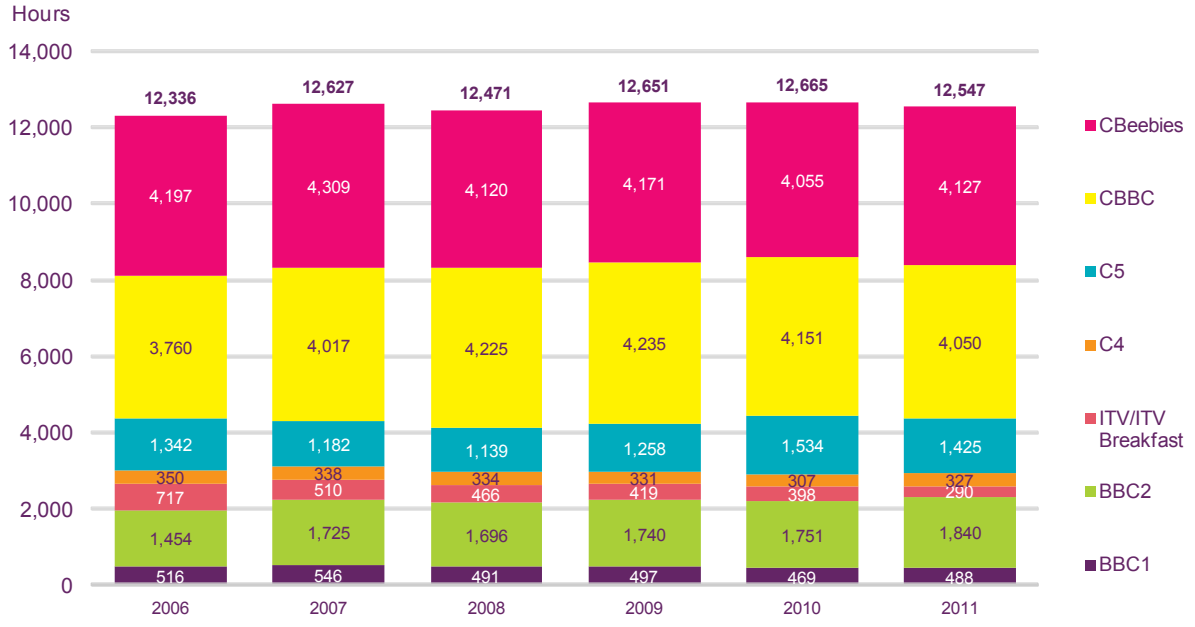
Hours of PSB children's programming

Total hours of PSB children's programming increased slightly from 2006 to 2011

In 2006 the PSBs as a whole broadcast a total of 12,336 hours of children's programming; this figure has increased slightly, to 12,547 hours in 2011.

Figure 12 below shows that this small increase is driven by the BBC channels and Channel 5. By contrast, ITV's output has dropped from 717 to 290 hours, and Channel 4 has declined from 350 to 327 hours.

Figure 12: PSB output, children's genre, all hours: 2006-2011



Source: Ofcom/broadcasters. Note: Spend is given in 2012 prices. Output and spend on the CITV channel is excluded.

Since 1998, total hours of PSB children's programming have increased; from 4,495 in 1998 to 12,547 in 2011

The large increase in total hours over this period was driven by the launch of the BBC's dedicated children's channels, CBBC and CBeebies, in 2002 (see Figure 13). Furthermore, BBC One and BBC Two increased their hours of children's programming from a combined total of 1,532 in 1998 to 2,328 in 2011. Channel 5 also increased its hours from 987 to 1,425 over this period.

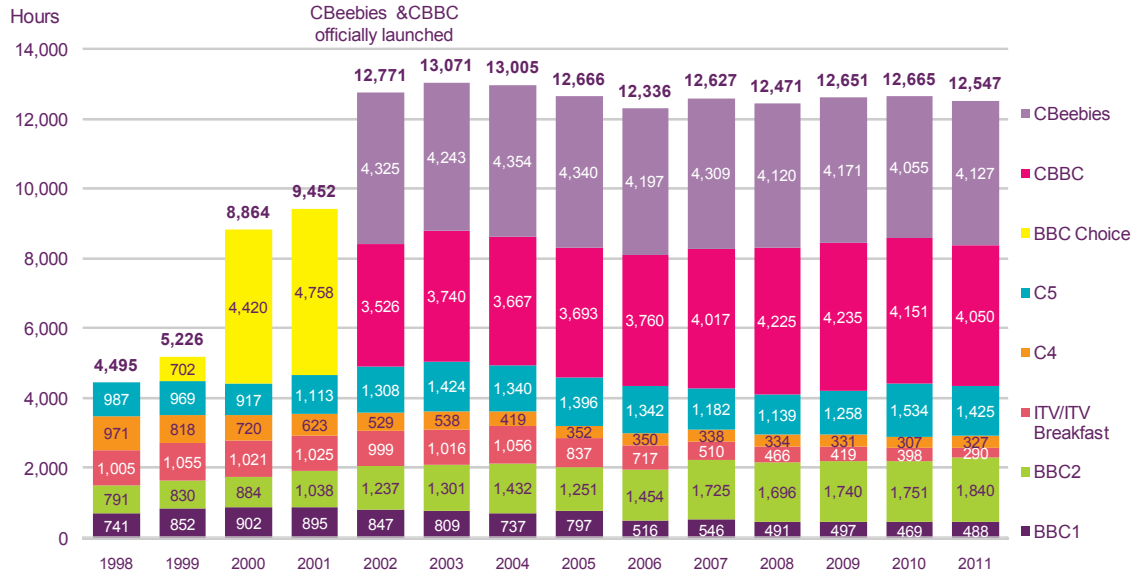
By contrast, ITV has seen a sharp and substantial decline; from 1,005 hours in 1998 to 290 hours in 2011, a reduction of 71% over the past 13 years. Two years after closing its in-house children's production centre in 2006, ITV publicly stated, in its 2008 *Statement of Programme Policy,*[29] its intention to reduce the number of hours broadcast on the children's slots on its main channel. [Note: ITV launched its dedicated children's channel, CITV, in 2006, which aired 3,132 hours of children's programming in 2011]. As the channel does not have a PSB remit, it is not represented in the chart below. However, it is included later in this section in our analysis of the commercial children's channels.

Channel 4 has also reduced the number of hours of children's programming by two-thirds compared to 1998 levels.

An implication of these shifts in provision has been an increased reliance on the BBC to deliver children's programming. In 1998 the BBC represented just over a third (34%) of total hours of PSB children's programming. In 2011, this figure rose to 84%, making the BBC overwhelmingly the main provider of PSB children's content.

Between 1999 and 2001 the BBC launched BBC Choice; the BBC's first digital-only channel. Though not a dedicated children's channel, it did air children's content, initially at weekends and then also daily during the daytime. These programmes were transferred to the CBBC channel when it was launched in 2002.

Figure 13: PSB children's programming, all hours: 1998 to 2011



Source: Ofcom/broadcasters. Note: Spend is given in 2012 prices. Output and spend on the CITV channel is excluded.

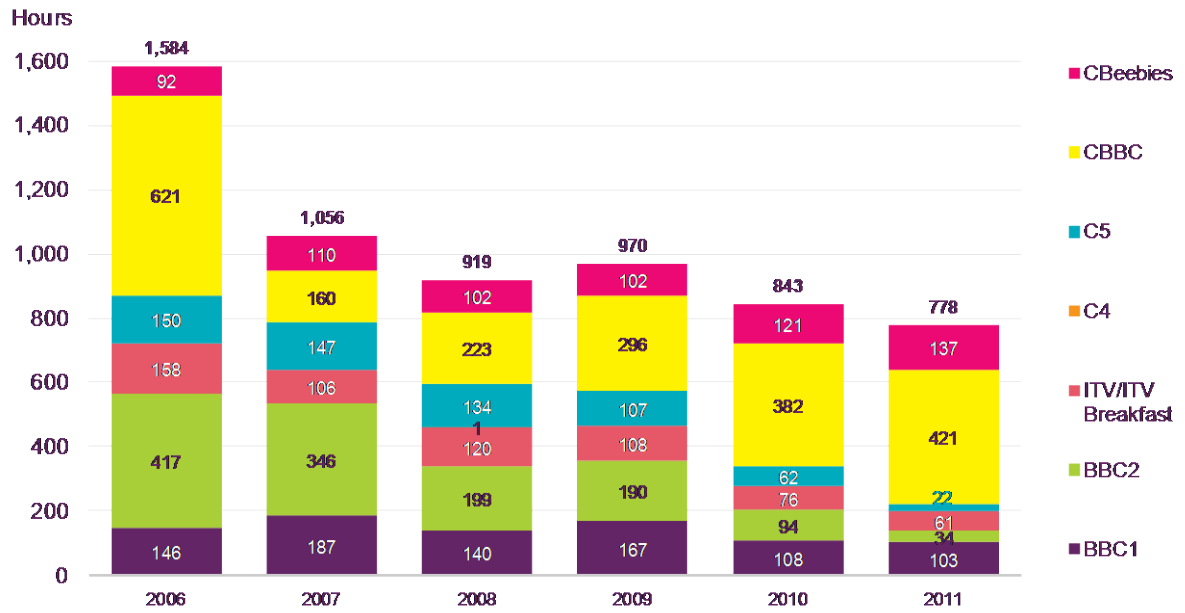
[29] *See ITV's Proposals for Children's Programming on* http://stakeholders.ofcom.org.uk/broadcasting/tv/children-itv/

PSBs' hours of first-run originations halved between 2006 and 2011

Hours of first-run originations halved between 2006 and 2011; from 1,584 hours to 778 hours, driven by decreases across all the PSB channels, with the exception of CBeebies. The BBC saw a collective 46% drop across its channels, whereas ITV decreased by 61% and Channel 5 by 85%.

The biggest five-year reduction across the PSB channels was for BBC Two, where hours fell from 417 in 2006 to 34 in 2011; a reduction of 92%. By contrast, since 2007 CBBC has gradually increased its hours of programming, to reach 421 hours in 2011. This 421 hours represented over half (54%) of all first-run originated hours for children's programming across the PSBs. Similarly, CBeebies' hours have almost doubled (up by 49%) to 137 hours over the same period.

Figure 14: PSB children's programming, first-run originations: 2006-2011



Source: Ofcom/broadcasters. Note: Spend is given in 2012 prices. Output and spend on the CITV channel is excluded.

Hours of PSB first-run originations are 40% down on 1998 levels

Over a 13-year period, first-run originated hours have decreased by 40%. Figure 15 below shows that in 1998 the PSBs provided 1,303 hours of first-run originated programming for children; by 2011 this stood at 778 hours.

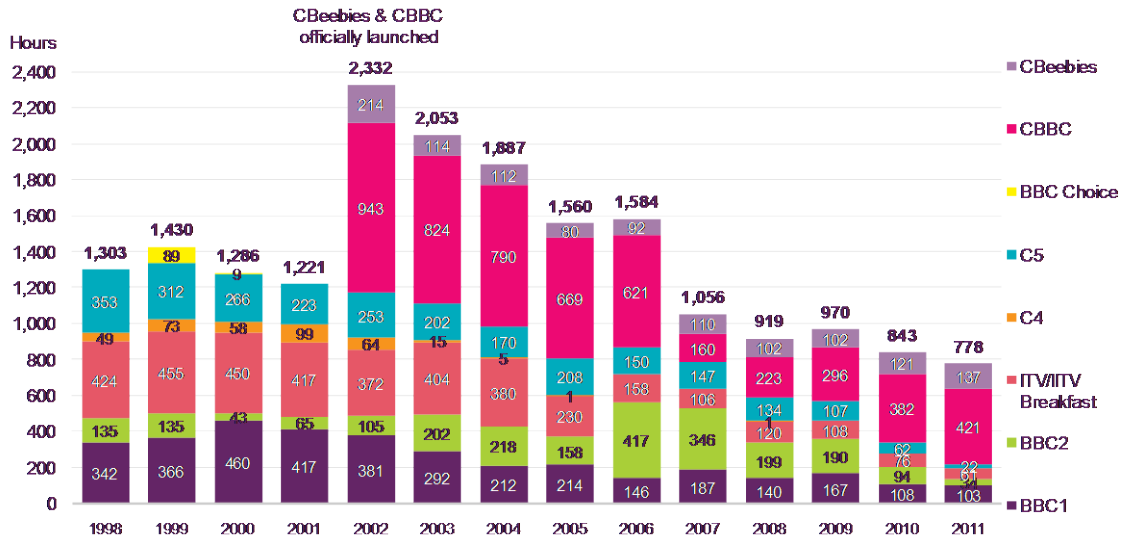
Channel 4 and Channel 5 started reducing their first-run children's content as early as 2000/2001. In 2011 they contributed 0% and 3% respectively to new UK PSB programming for children. ITV's output has declined from 424 hours in 1998, when it contributed around a third of new PSB programmes, to 64 hours in 2011; representing only 8% of first-run originated children's content across the PSBs.

Across its channels, the BBC has seen a long-term increase in the number of first-run originated programmes; from 477 in 1998 to 695 in 2011. Within this, there has been a shift from provision on BBC One and BBC Two to a focus on its two dedicated children's channels, CBBC and CBeebies.

- Since the launch of both channels in 2002, CBeebies' first-run originated hours have decreased from 214 to 137 hours in 2011, while CBBC hours decreased from 943 to 421 hours. The high number of first-run hours in 2002 was necessary to fill the new schedules on each channel. Since then, hours of new UK content have varied each year, with small year-on-year increases on each channel (13% and 10% respectively).

In 2011, 89% of all PSB first-run originations emanated from the BBC, compared to 37% in 1998, which means that the BBC is now overwhelmingly the main provider of new UK-made PSB children's content.

Figure 15: PSB children's programming, first-run originated hours: 1998-2011



Source: Ofcom/broadcasters. Note: Spend is given in 2012 prices. Output and spend on the CITV channel is excluded

First-run original children's programming has more than halved since 2006

The proportion of first-run original children's programming has more than halved since 2006 while the number of repeats has increased by 10%. In 2011, 91% of all children's content on the PSBs was repeated content, compared to 84% in 2006.

It is worth noting that repeats themselves are not necessarily a negative aspect of children's programming. For example, pre-school children can enjoy and benefit from watching the same programme more than once, as this reinforces concepts and ideas conducive to their development. Furthermore, in a digital world of 29 dedicated children's channels (see Figure 1), repeats can offer children over pre-school age the chance to watch programmes they may have missed. However, channels airing such a high volume of repeated content may struggle to retain the attention of older children, for evidence suggests that the majority of older children tend to watch more 'adult' content compared to programmes that specifically fall within the children's genre. For more information on this see Figure 42.

Figure 16: Children's output on PSB channels, all hours: 2006-2011

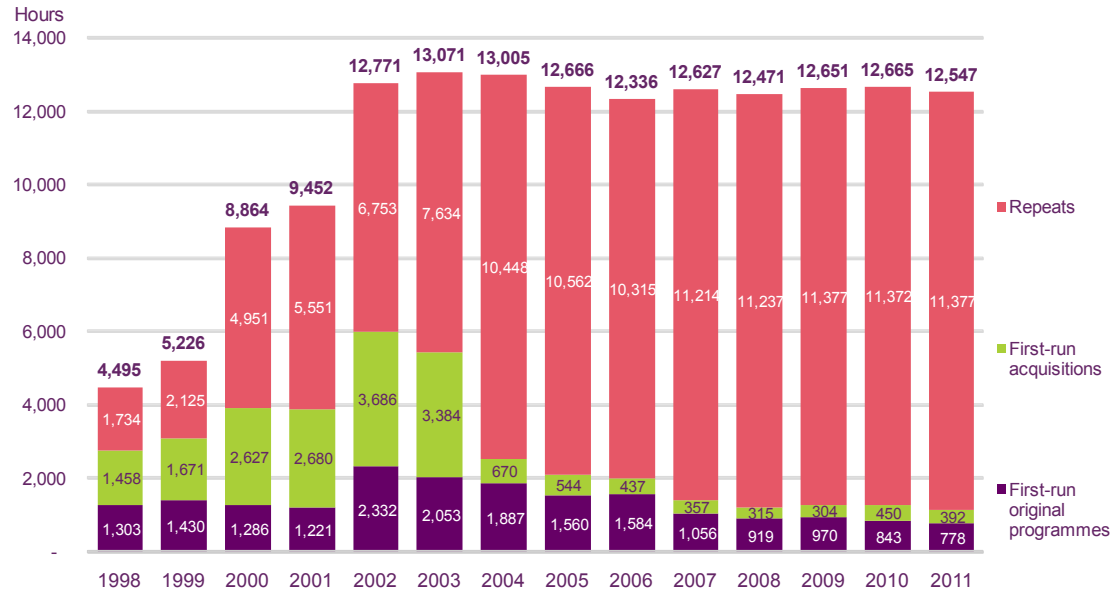
Source: Ofcom/broadcasters
PSB Channels included: BBC One, BBC Two, ITV, Channel 4, Channel 5, CBBC, CBeebies. CITV and S4C are excluded.

The proportion of repeats on the PSB channels has grown from 39% in 1998 to 91% in 2011

The long-term reduction in first-run originations coincides with a decrease in first-run acquisitions and an increase in the number of repeats. In 2011, 91% of children's content across the PSBs was repeats, compared to 39% in 1998. Concomitantly, the proportion of first-run originations dropped from 29% in 1998 to 6% in 2011.

Figure 17 shows that in 2002 there was growth in first- run originations, acquired content, and repeats, which can be attributed to the launch of CBeebies and CBBC that year. By 2004 this pattern had settled, and since then the majority of children's output has consisted of repeats, with first-run originations and acquired output falling year on year.

Figure 17: PSB children's programming, all hours: 1998 to 2011



Source: Ofcom/broadcasters. PSB Channels included: BBC One, BBC Two, ITV, Channel 4, Channel 5, CBBC, CBeebies. Excluded: CITV and S4C

In 2011 there were 29 dedicated children's channels available on TV. This number includes channels available free-to-view as well as those on pay-TV (see Figure 1). According to Ofcom's estimates, the number of total hours broadcast across these 29 channels totalled 112,207 hours; an increase of 17% on the previous year. Over the same period, as total hours increased, first-run originated hours decreased by 40%.[30]

[30] Includes CBBC, CBeebies, CITV, Baby TV, Boomerang, Boomerang +1, Cartoon Network, Disney Channel, Disney Channel +1, Disney Cinemagic, Disney Cinemagic +1, Disney Junior, Disney XD, Disney XD +1, Nick Jr., Nick Jr. 2, Nickelodeon, Nickelodeon +1, Nicktoons, Nicktoons Replay

Hours of children's programming on the commercial children's channels

The section below provides a snapshot of provision by the commercial children's channels.

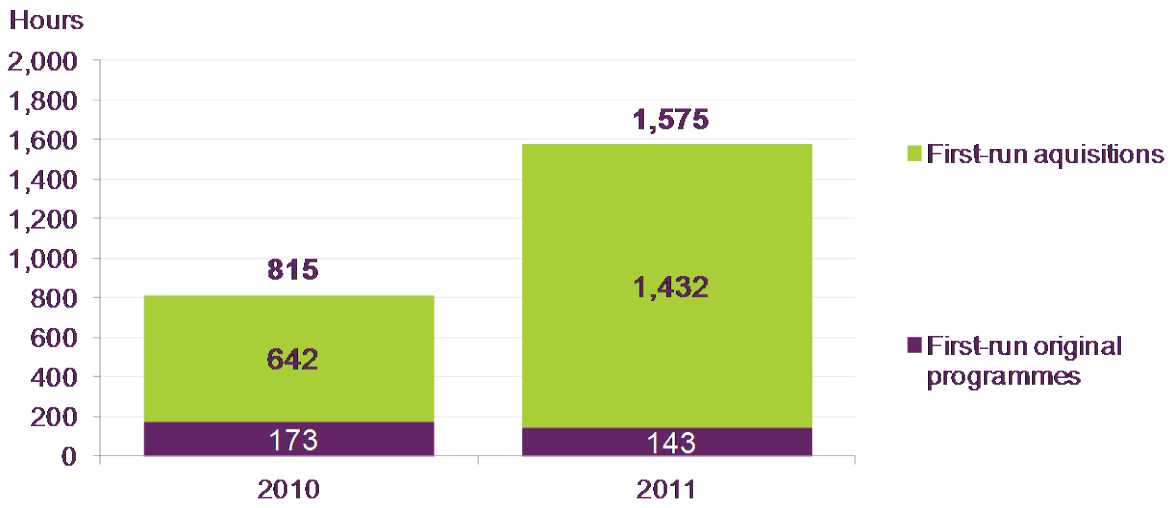
Between 2010 and 2011, total hours on commercial children's channels increased by 26% as first-run originations decreased by 17%

Based on data collected by Ofcom from the commercial children's channels[31], in 2011, 0.1% of total children's hours broadcast on the commercial children's channels were first-run originations, compared to 0.2% in 2010.

According to the data, between 2010 and 2011, total hours on these commercial children's channels increased by 26% as first-run originations decreased by 17%. However, first-run acquisitions increased by 123% year on year (see Figure 18). The big year-on-year increase in first-run acquisitions meant that the total number of first-run hours (original and acquired) increased by 93% between 2010 and 2011.

In 2010, we estimated that 1% of all programming on the commercial children's channels was first-run (both original and acquired) compared to 2% in 2011. As we have seen with the PBSs, the commercial children's channels appear to have a high output of repeated content. The 2% figure for first-run programming is, however, considerably lower than the proportion for the PSBs, (9% in 2011). However, the total number of hours broadcast on the commercial children's multichannels is almost seven times greater than what is broadcast on the PSB children's channels.

Figure 18: Estimated commercial children's channels hours of programming: 2010 – 2011



Source: Ofcom/broadcasters.
Note: This is based on the following channels: Baby First TV, Baby TV (both launched in 2011), Boomerang UK, Cartoon Network UK, Cartoonito, CITV, Disney Channel, Disney Cinemagic, Disney Junior, Disney XD, Nick Jr., Nick Jr. 2, Nickelodeon, Nickelodeon HD, Nicktoons TV.

[31] Based on the following channels: Baby First TV, Baby TV (both launched in 2011), Boomerang UK, Cartoon Network UK, Cartoonito, CITV, Disney Channel, Disney Cinemagic, Disney Junior, Disney XD, Nick Jr., Nick Jr. 2, Nickelodeon, Nickelodeon HD, Nicktoons TV.

6 Range of children's programming

This section considers the range of children's programmes provided by the PSBs at a sub-genre level. It looks at the proportion of hours that are dedicated to children's news, factual, entertainment, drama, animation and pre-school programmes.

Key points

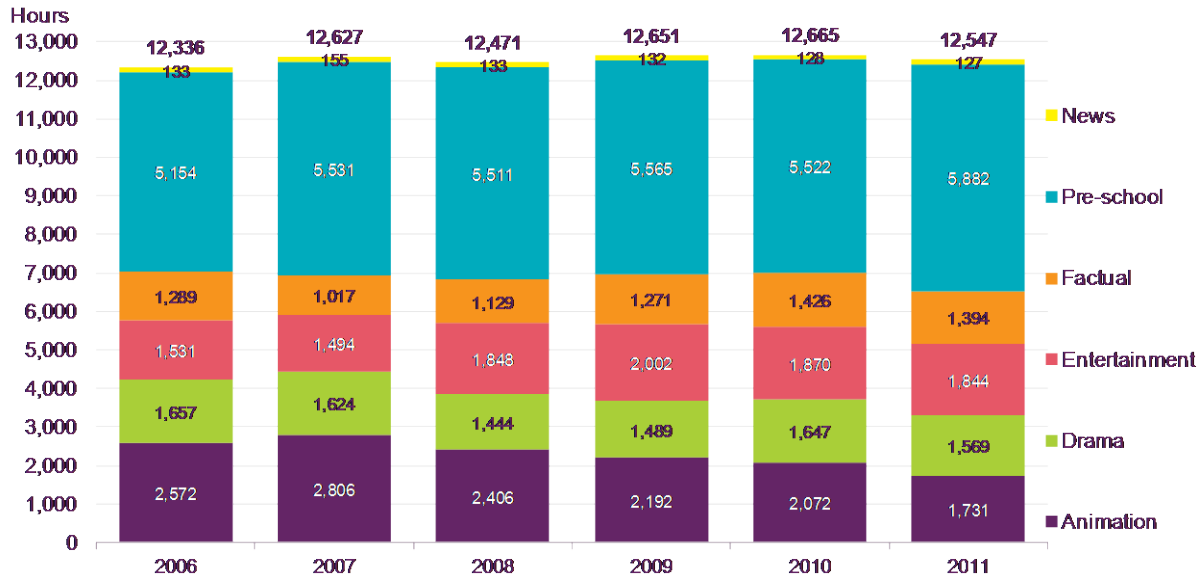
The proportion of children's sub-genre hours has remained broadly similar between 2006 and 2011.

Taking the PSBs as a whole, other than pre-school, each children's sub-genre saw a decline in first-run originated hours between 2006 and 2011.

In 2011, the BBC was the sole PSB broadcaster of new UK children's drama and news programming.

Between 2006 and 2011 the number of hours of children's output remained broadly similar. The proportion of output for the sub-genres also remained largely consistent over the five-year period, though there was a notable decline in animated content and an increase in the hours of pre-school programming.

Figure 19: PSB output, all children's hours by sub-genre: 2006-2011



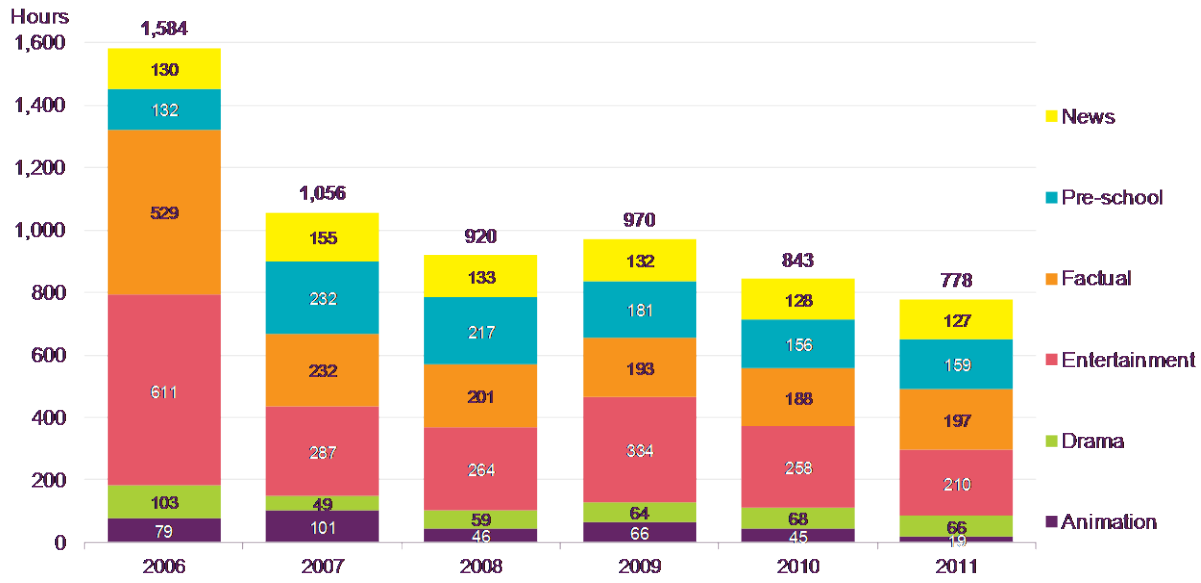
Source: Ofcom/broadcasters. PSB Channels included: BBC One, BBC Two, ITV, Channel 4, Channel 5, CBBC, CBeebies. Excluded: CITV and S4C.

Each children's sub-genre saw a decline in first-run originated hours between 2006 and 2011

Within the context of a 51% decline in hours of first-run originations on the PSBs as a whole, each children's sub-genre, with the exception of pre-school, experienced a reduction in hours between 2006 and 2011. Pre-school was the only sub-genre to have increased its number of first-run hours, which went up 20%, from 132 hours in 2006 to 159 hours in 2011.

Entertainment output declined by two-thirds (66%) while factual programming declined by a similar amount (63%).

Figure 20: PSB output, children's genre, first-run hours by sub-genre: 2006-2011



Source: Ofcom/broadcasters. PSB Channels included: BBC One, BBC Two, ITV, Channel 4, Channel 5, CBBC, CBeebies. Excluded: CITV and S4C.

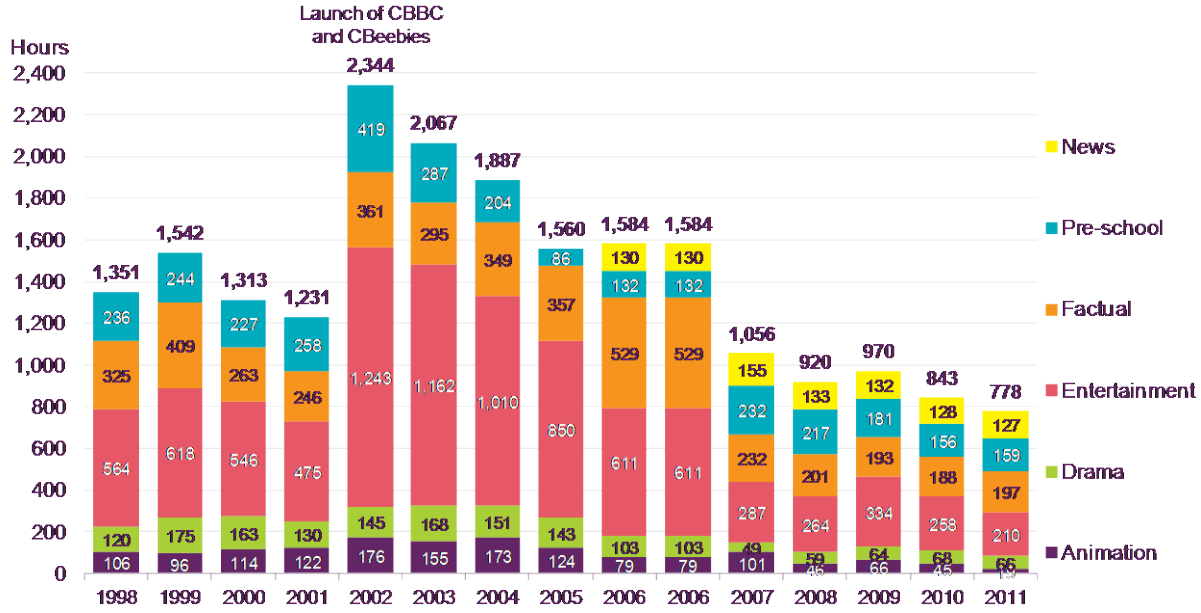
Between 1998 and 2011, children's animation and entertainment experienced the biggest relative reductions in first-run originated hours (82% and 63% respectively)

In 1998 the PSBs broadcast 1,351 hours of new UK programming for children, offering a range of genres, consisting of 42% entertainment, 24% factual, 17% pre-school, 9% drama and 8% animation. Figure 21 below shows that since then, the range and quantity has changed substantially.

The proportion of entertainment and factual first-run originations shown by the PSBs has remained broadly the same from 1998 to 2006. From 2006 onwards there was a dramatic shift; the volume of both sub-genres reduced considerably after 2006, and by 2011 the proportions of entertainment, factual and pre-school content were more or less equal.

All sub-genre categories experienced a reduction in hours over this period. The biggest reduction was in the number of hours of new UK animation, which declined by 82%; from 106 hours in 1998 to 19 hours in 2011 (in the face of vast competition from the US-owned children's channels, whose main output is animation). Pre-school, which was the least affected sub-genre, saw its first-run hours reduced by a third.

Figure 21: PSB children's programming, first-run hours by sub-genre: 1998-2011



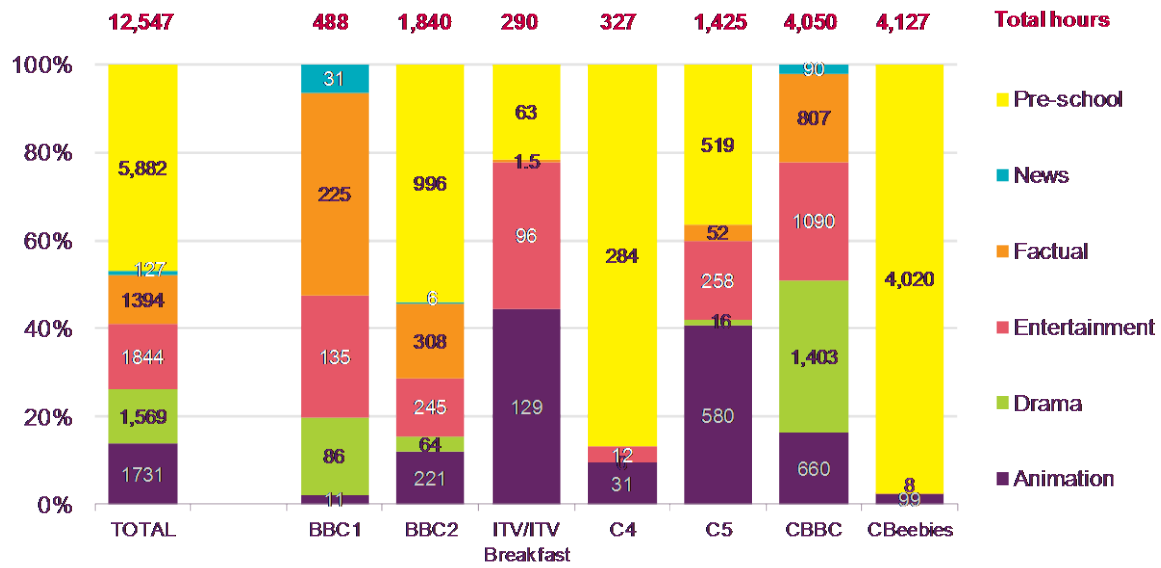
Source: Ofcom/broadcasters. PSB Channels included: BBC One, BBC Two, ITV, Channel 4, Channel 5, CBBC, CBeebies Excluded: CITV and S4C.

In 2011 almost half of all PSB children's programming was pre-school.

Figure 22 shows the proportions of hours, by sub-genre, shown on each of the PSB channels in 2011.

The majority (47%) of all children's programmes broadcast on the PSBs in 2011 were pre-school, with over two-thirds (68%) of the output coming from CBeebies.

Figure 22: PSB output, children's genre, all hours, by sub-genre and channel: 2011



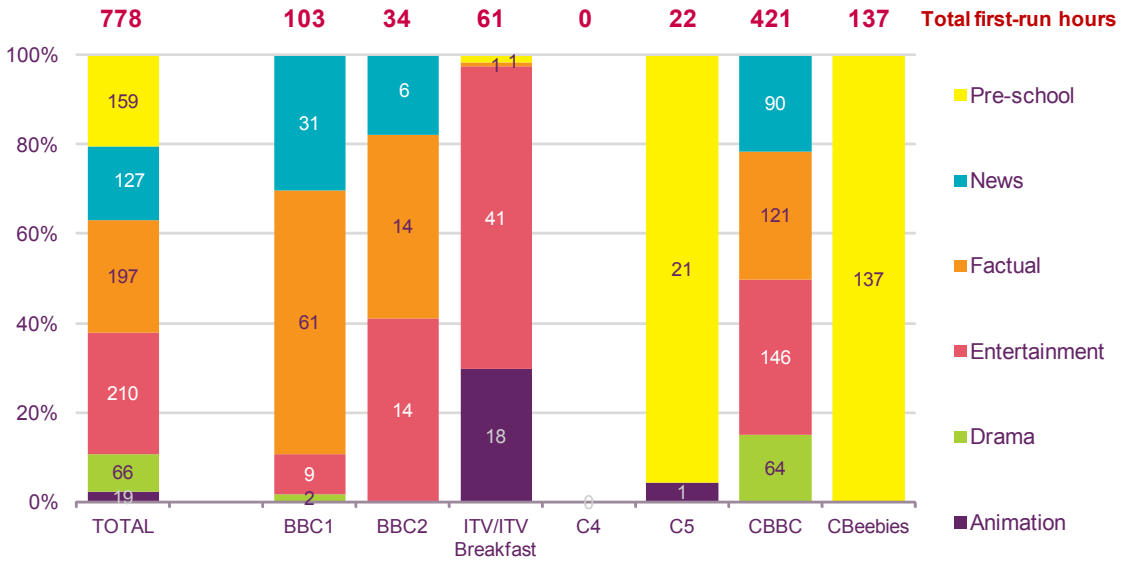
Source: Ofcom/broadcasters. PSB Channels included: BBC One, BBC Two, ITV, Channel 4, Channel 5, CBBC, CBeebies Excluded: CITV and S4C.

By 2011, the BBC was the sole PSB broadcaster of new UK children's drama and news programming

In 2011, across all the PSB channels, only 66 hours of first-run originated drama was broadcast entirely by the BBC. Across the PSBs, the BBC is also the only broadcaster of children's news, and overwhelmingly the main provider of new UK factual programming; ITV/ITV Breakfast contributed one hour of first-run originated factual programming in 2011.

The 61 hours of new UK programming on ITV consisted of entertainment and animation, whereas Channel 5 showed 22 hours of new UK programming mainly dedicated to pre-school.

Figure 23: PSB output, children's genre, first-run hours by sub-genre and channel: 2011



Source: Ofcom/broadcasters. PSB Channels included: BBC One, BBC Two, ITV, Channel 4, Channel 5, CBBC, CBeebies. Excluded: CITV and S4C.

UK and non-UK children's programming

Summary of key points

In 2011, 20% of all children's content aired by the PSBs and commercial children's channels, taken as a whole, was of UK origin (first-run and repeats).

In 2011 the commercial children's channels showed just over 20,000 hours of UK children's programming (new and repeated) whereas the PSBs showed just over 10,500 hours.

In 2011 the PSBs showed a range of UK programming, of which more than half was pre-school (52%), followed by UK drama (13%), UK factual, (13%), UK entertainment (12%) and UK cartoons (8%).

Similarly, for the commercial children's channels, the majority of UK programming was pre-school (42%) followed by UK drama (17%).

In 2011 the commercial children's channels showed a lower proportion of UK factual programming compared to the PSBs (4% of their total UK content versus 13% for the PSBs). However, they showed a slightly higher proportion of UK drama (17% of total UK content compared to 13% by the PSBs).

Children aged 4-15 showed an appetite for UK children's programming: 45% of children's programming watched by 4-15s in 2011 was UK-originated, while only 20% of total output across the children's genre (by PSBs and multichannels) was UK-originated.

The annual data that Ofcom receives from the commercial children's channels does not provide hours of first-run originations split by the children's sub-genres (e.g. animation, pre-school, etc). In order to build a picture of the range of UK programming on these channels together with the programmes offered on the PSB channels, Ofcom commissioned TV research agency, Attentional, to provide this analysis using BARB data for the 2011 period. The following section presents findings from this analysis. It opens with an overview of total hours and total viewing by UK and non-UK origin, and moves on to assess the levels of provision by children's sub-genre.

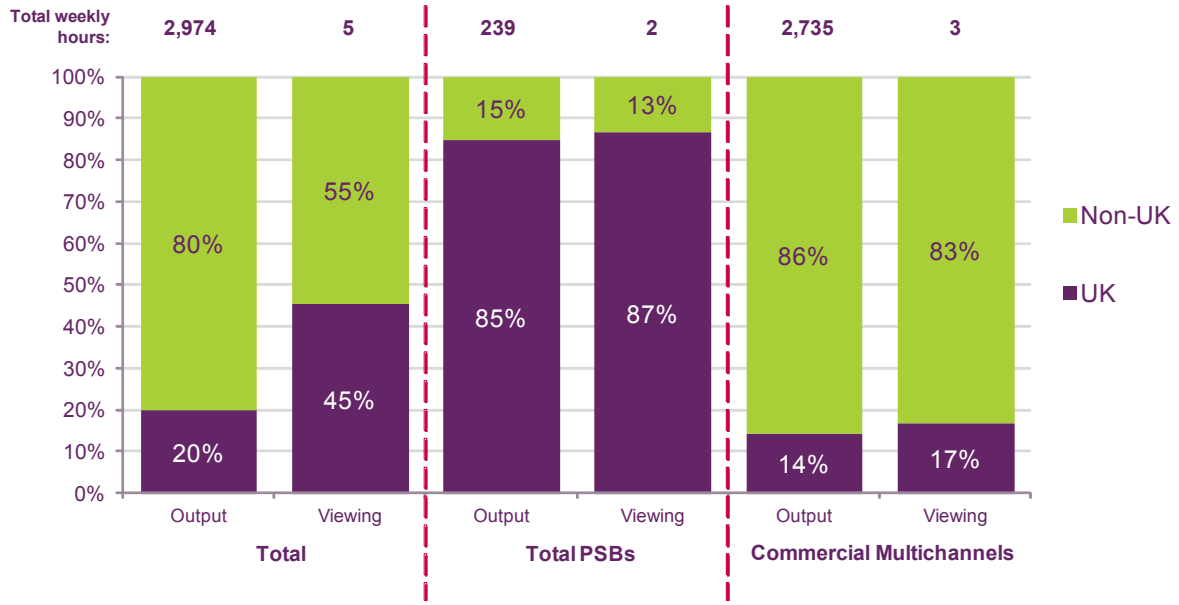
Note: The definitions of UK programmes and children's sub-genres do not exactly match those used earlier in this report, as they come from two different data sources; BARB and broadcaster returns. In this section UK programmes include both *new* and *repeated* UK programming, whereas the analysis in Section 6 focuses on new UK programming only, described as first-run originated content.

In 2011, the vast majority (80%) of children's programming was not made in the UK

In 2011, the overwhelming majority (80%) of children's programming across the total sector was international, while 20% was UK-made content (see Figure 24).

Analysis of the PSB channels shows that in 2011 85% of children's programmes were UK-made. Most of the programming on the commercial children's channels was non-UK children's content; it was predominantly of US origin, as the majority of channels are owned by three US companies: The Walt Disney Company, Turner, and Viacom.

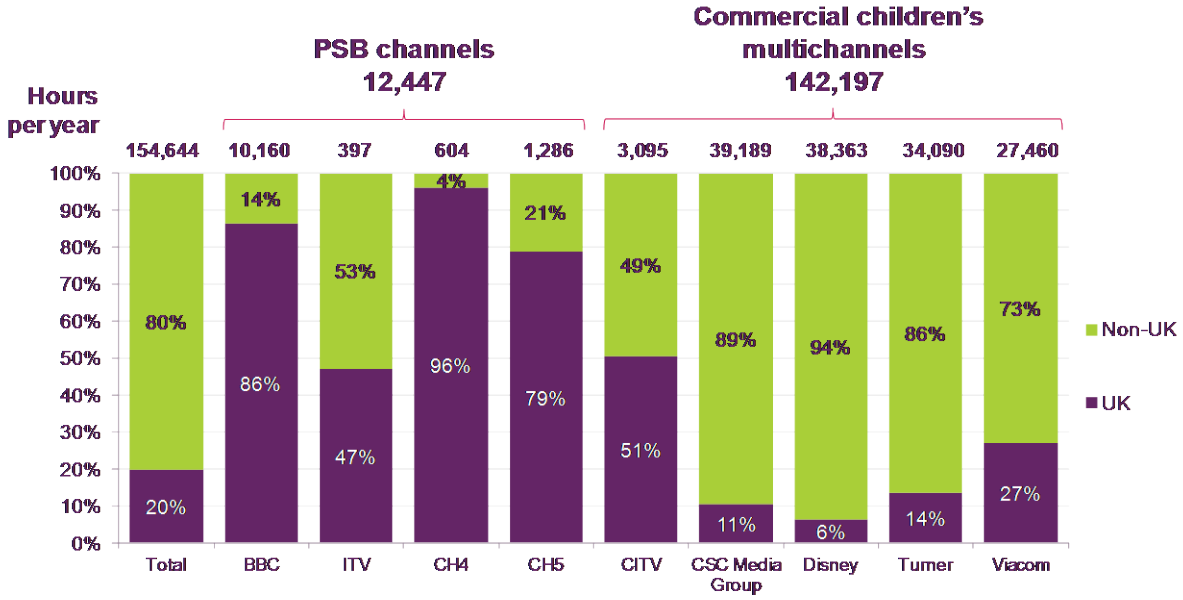
Figure 24: Proportion of output and viewer hours in 2011, by UK and non-UK programme origin: children 4-15



Source: Attentional / BARB (Programmes with BARB code "Children's," Demographic Children 4-15)

The BBC was by far the main contributor of PSB UK children's programming, representing 83% of UK programming shown by the PSB channels. Figure 25 below shows that in 2011 86% of the BBC's total hours across BBC One, BBC Two, CBeebies and CBBC were UK-made. Conversely, ITV's proportion of UK content was much lower than the other PSB broadcasters, representing only 2% of total PSB UK productions in 2011. Similarly, just over half (51%) of all children's content aired on ITV's dedicated children's channel CITV was of UK origin.

Figure 25: Total children's programming: hours of UK versus non-UK programming: 2011



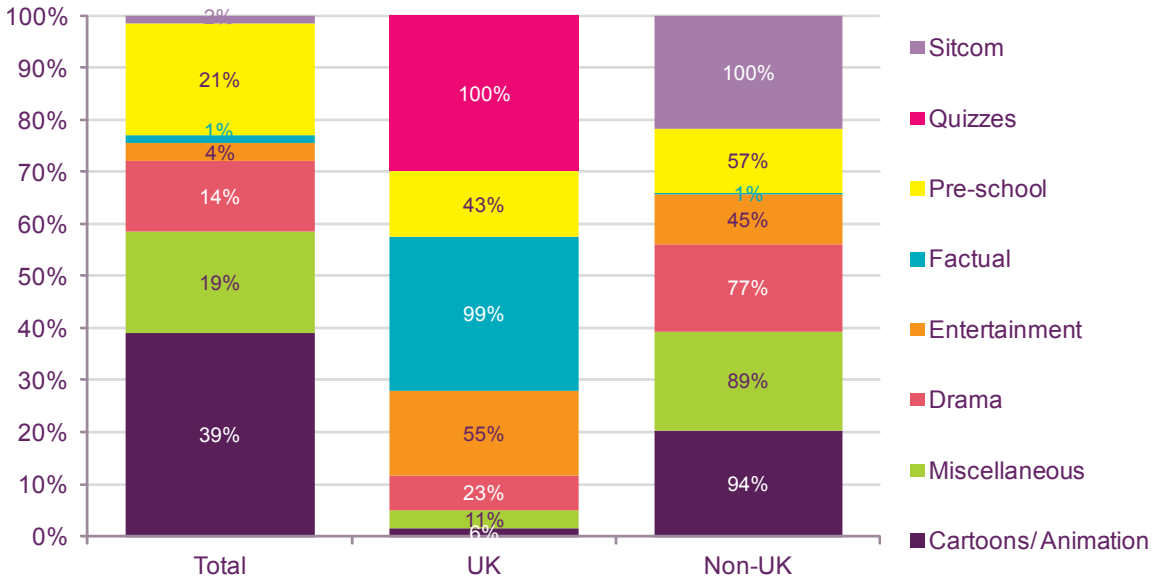
Source: Attentional / BARB (Programmes with BARB code "Children's," Demographic Children 4-15). Ofcom/ broadcasters.

Figure 26 shows children's content shown in 2011 by sub-genre. Across the total UK children's market, the majority of programming was cartoons/ animation, followed by pre-school (39% and 21% respectively). The overwhelming majority of animated programmes shown on UK television in 2011 were not produced in the UK. In fact, only 6% of animated content in 2011 was of UK origin.

Factual programming, which represented only 1% of total children's content in 2011, was predominantly produced in the UK. Pre-school programming, which represented 21% of the total children's market in 2011, was more evenly split by UK and non-UK production (43% and 57% respectively).

Drama, which represented 14% of total children's programming in 2011, was largely of non-UK origin (77%). Only 23% of total UK-produced programming in 2011 was in this genre.

Figure 26: Proportion of output of children's programming, by UK and non-UK programme origin: 2011

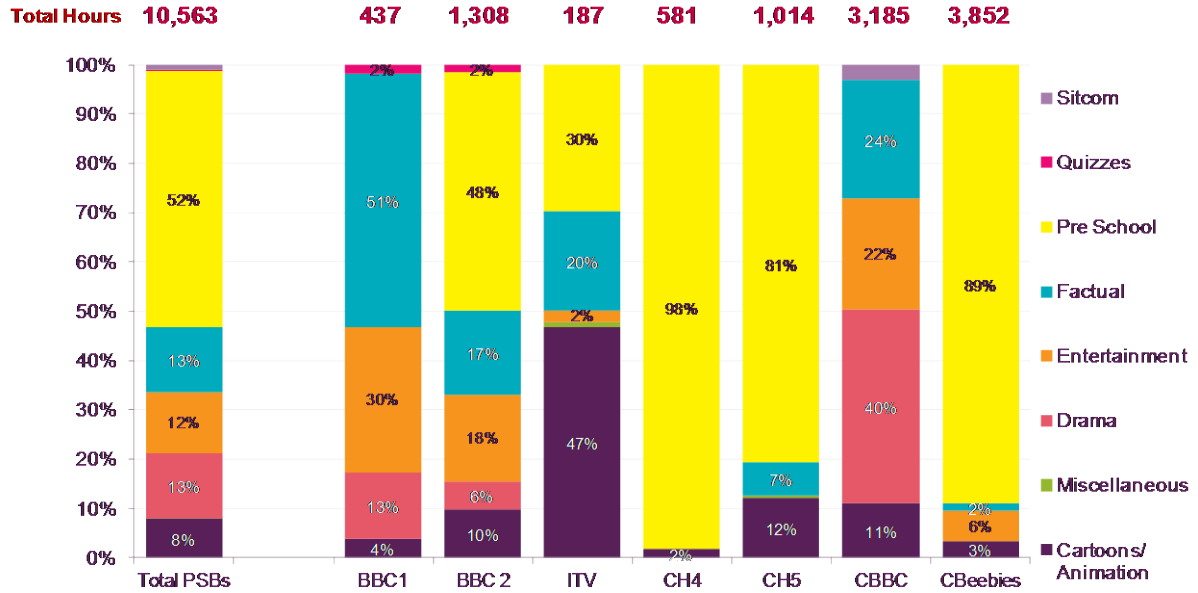


Source: Attentional / BARB (Programmes with BARB code "Children's," Demographic Children 4-15). Ofcom/ broadcasters.

Figure 27 shows the distribution of UK output, by children's sub-genres, for each of the PSB channels in 2011. Taken as a whole, these channels showed a range of UK programming, of which the majority was pre-school (52%), followed by drama (13%) and factual (also 13%), entertainment (12%) and cartoons (12%).

In 2011 the BBC channels broadcast a range of sub-genres on BBC One, BBC Two and CBBC, whereas the vast majority of programming on CBeebies was pre-school content. In 2011 UK drama was solely produced by the BBC, and predominantly aired on CBBC, where it comprised 40% of the total UK output for the channel.

Figure 27: PSB children's programming: proportion of UK output by subgenre: 2011



Source: Attentional / BARB (Programmes with BARB code "Children's". Ofcom/broadcasters.

In 2011, 14% of all content aired by the commercial children's channels was of UK origin

The commercial children's channels broadcast just over 20,000 hours of UK children's programmes in 2011. This is almost double the total UK hours shown by the PSBs, which was just over 10,500 hours (see Figure 27 above).

The commercial children's channels showed a lower proportion of UK factual programming (4% of UK content) compared to 13% by the PSBs. However, 17% of UK content broadcast by the commercial children's channels in 2011 was UK drama, compared to 12% by the PSBs.

Of the commercial children's channels, ITV-owned CITV aired the largest proportion of UK content in 2011 (51%) (see Figure 25 above). However, the number of hours produced by CITV is only a fraction of what is broadcast by the big three US companies and their portfolio of children's channels. In 2011, the majority of UK content broadcast by CITV was cartoons/ animation (36%) and pre-school (24%). UK drama and UK factual programming on CITV represented 13% and 14% respectively, and included titles such as *My Parents are Aliens* and *The Worst Witch* (drama), as well as *Art Attack* and *Wannabes* (factual).

Viacom-owned channels (e.g. Nickelodeon, Nick Junior, Nicktoons) aired the second largest proportion of UK content (27%) (see Figure 25 above). Figure 28 below shows that this was largely driven by pre-school programmes such as *Peppa Pig*, *Bob the Builder* and *Ben and Holly's Little Kingdom* shown on Nick Junior. UK-produced drama programmes were the

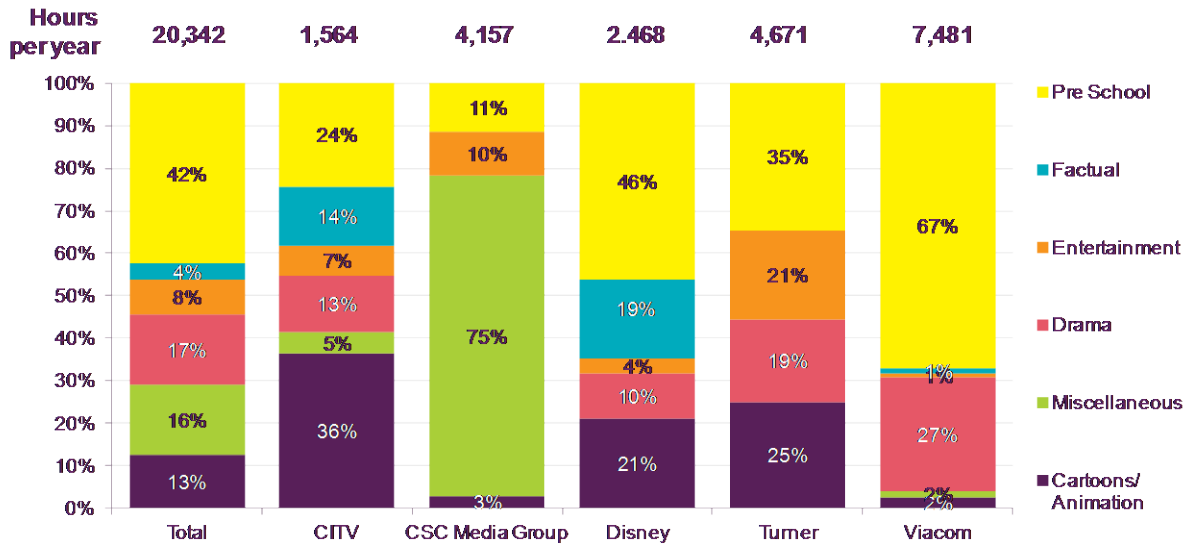
second most- aired UK content type on the Viacom channels, with programmes such as *Genie in the House*, *Summer in Transylvania* and *The House of Anubis*.

The Turner-owned channels (e.g. Cartoon Network, Cartoonito, Boomerang) aired the third-largest proportion of UK-produced content (see Figure 25 above). They broadcast a range of genres, of which UK pre-school was the most popular (35% of UK content). The proportion of UK entertainment, drama and animation was fairly evenly split in 2011. However, the UK drama figure for Turner is slightly misleading; on closer analysis only one UK-produced drama, *My Spy Family*, was broadcast in 2011 on the Boomerang channel. It is very probable that the high proportion of UK drama on Turner is due to a high volume of repeats.

The CSC Media Group channels (e.g. Kix!, Pop, Tiny Pop) collectively broadcast 11% of UK-produced output in 2011 (see Figure 25 above). Three-quarters of the content on these channels has been classified as 'miscellaneous', which includes programmes such as *Pop Party*, *Sports Lab* and *Learn to Dance*.

Of the US-owned channels. the Disney channels (e.g. Disney Channel, Disney Junior, Disney XD), aired the smallest proportion of UK content in 2011, almost half of which was pre-school (46%). Although the proportion of UK-produced factual programming on the Disney channels seems rather high (almost a fifth of total UK output by the broadcaster), it is solely comprised of Disney's *Art Attack*. The high proportion is, again, likely to be driven by a high volume of repeats.

Figure 28: Proportion of commercial children's channel output, by UK programme origin: 2011



Source: Attentional / BARB (Programmes with BARB code "Children's").

Recent market developments in the provision of UK children's programming by the commercial children's channels

CITV

Between 2006 and 2010 CITV did not commission any new UK programmes. In 2010 it commissioned its first new series in five years, animation show *Fleabag Monkeyface*. ITV's website outlines its current commissioning plans for CITV "*We commission and acquire a range of programmes aimed at children up until the age of about 11. When commissioning*

we do not tend to generally fully fund so co-pros are completely the norm here. We are looking to focus on shows for 4-9 year-olds and live action and animation"[32]

Viacom

Viacom has commissioned, or co-produced, a range of UK children's programmes for its Nickelodeon channels. An example of Viacom's UK drama is *The House of Anubis;* this programme marked a change in commissioning strategy for Viacom, which had previously produced UK drama only for its UK-based channels. *The House of Anubis* was the first Nickelodeon series to be produced in the UK, and the first original UK drama programme commissioned by Nickelodeon since 2002; it was aired first in the US, in 2011, followed by the UK.[33] Its success is reflected in the UK audience figures, which ranked it the number-one UK-produced programme on the channel in 2011.

Other recent UK commissions from Viacom include new episodes of *Peppa Pig*; drama show *Summer in Transylvania*; and pre-school shows *Ben and Holly's Little Kingdom* and *Humf*. However, most of these programmes are not first-run originations, but have either been co-produced or bought to air on these channels.

Turner

In 2007, Turner set up an animation studio in the UK for European creative development. Programmes produced include: *The Amazing World of Gumball*, *Hero: 108* and *The Furry Pals*. The first programme to be commissioned, *The Amazing World of Gumball (*launched May 2011), was the most-watched UK-produced programme on Cartoon Network/Cartoon Network Too in that year. Unlike drama programmes that tend to have limited international or secondary revenue potential, Turner's UK-produced content conforms to the economic model for animation which allows programmes to be re-purposed and exported internationally, as well as securing merchandising deals. In 2011, the majority of UK-produced programmes aired on the Turner channels were pre-school and animation. Some UK-produced Turner programmes, including the *The Amazing World of Gumball* and *Hero: 108* have been exported back to their US network. This is a very rare occurrence among the US-owned channels, which tend to show US content on their channels broadcasting in the US.

Disney

Disney's recent UK commissions include the football programme *Goalmouth*; animation *Jungle Junction*; and *Next X,* - a pan-European extreme sports programme for Disney XD channel.

[32] Source: http://www.itv.com/commissioning/digital-channels/
[33] Produced in Liverpool by Lime Pictures.

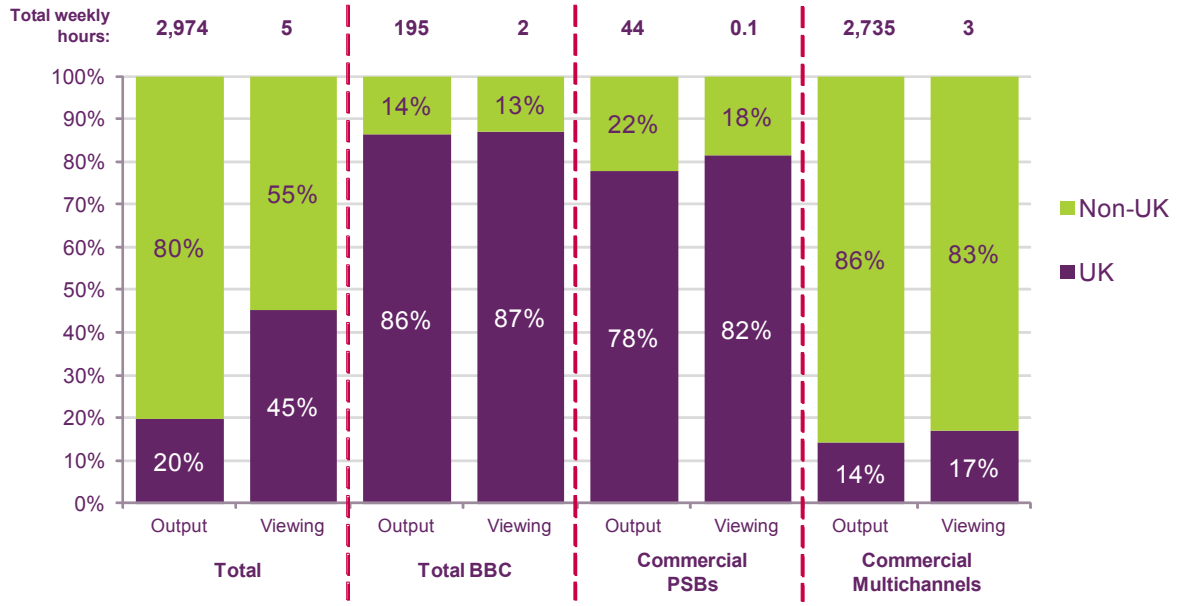
Children show appetite for UK-made children's programming

The Attentional research enabled us to compare the number of hours of UK content broadcast with the amount of time children aged 4-15 spent watching this content.

Figure 29 below shows that 45% of all children's content consumed by children aged 4-15 in 2011 was of UK origin, despite the fact that only 20% of children's programmes aired on TV were of UK origin. This suggests that there is a demand for UK children's programming.

The PSB channels are the main providers of UK children's content, but the high volume of output broadcast by the children's commercial multichannels brings the overall UK output total down to 20%.

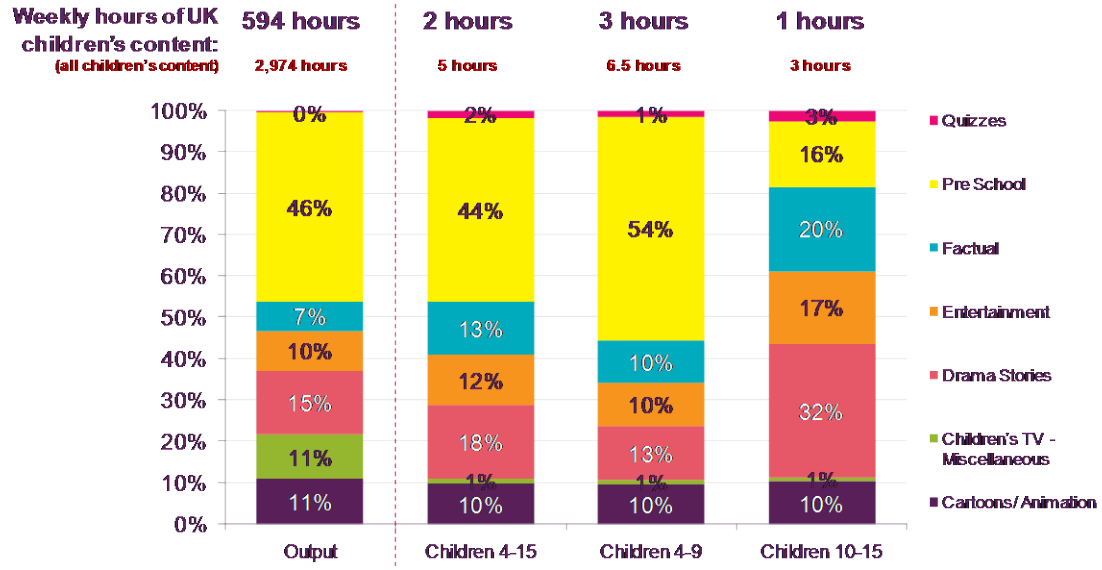
Figure 29: Proportion of output and viewer hours, by UK and non-UK programme origin, children 4-15: 2011



Source: Attentional / BARB (Programmes with BARB code "Children's," Demographic Children 4-15)

Figure 30 shows further analysis by children's sub-genre by age. Children aged 10-15 watched fewer dedicated children's programmes than younger children (aged 4-9) (3 hours and 6.5 hours respectively in 2011). Older children also appeared to have an appetite for UK-produced drama and factual programming: over one-third (32%) of time spent watching UK programming was to UK drama, while 20% was to UK factual content. By contrast, younger children spent the majority of their time watching UK pre-school content (54%), although they also show an appetite for UK drama (13%) which was the second most-viewed sub-genre for 4-9 year-olds.

Figure 30: Hours vs. viewing: UK children's content, by sub genre: 2011



Source: Attentional / BARB (Programmes with BARB code "Children's," Demographic Children 4-15)

7 Children's television viewing

Children (aged 4-15) spent 17 hours a week watching television in 2011. Of this, almost a third (6 hours) was spent watching children's programmes.

Children spent nearly half of their viewing time (48%) watching the commercial multichannels in 2011.

In 2011, more than half (53%) of the time that children spent watching the children's genre was spent watching the commercial children's channels.

Live TV was still the preferred method of watching television in 2011; only 14% of TV viewing was time-shifted by children aged 4-15.

In 2012 two-thirds of households with children (66%) had access to pay-TV at home.[34] As of October 24th 2012, following digital switchover, all children with a TV at home have access to the free-to-air digital channels. Children now have a vast array of channels to watch (both free-to-air channels and those available via pay-TV) which is leading to a reduction in the time spent watching the main five PSB channels.

This section opens by considering children's media use, and attitudes to television, radio, the internet, phones and games consoles, based on the results of Ofcom's 2012 media literacy research.[35] It then presents BARB[36] findings in terms of the amount of time children spend watching all TV, and the different channels watched, over the period 2006-2011. It finishes with an analysis of the time children spend watching children's programming.

Television continues to play an important role in the lives of all children, although this is more pronounced for younger children

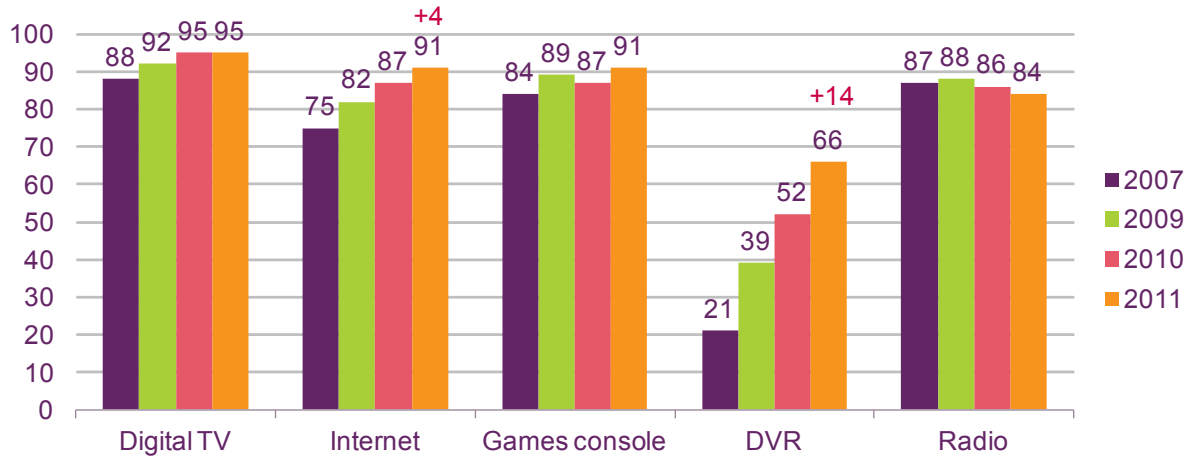
Results from Ofcom's media literacy survey (2012) among children aged 5-15 shows that television continued to play an important role in children's lives, particularly for those aged 5-11. For 12-15 year-olds, however, while television continued to be widely used, it is increasingly competing with both mobile phones and the internet for children's time and attention.

All children have access to a TV at home

The data show that television continues to be one of the media devices most easily available to children. In 2011 all children aged 5-15 (100%) claimed they had access to a television at home.[37] In addition, as shown in Figure 31, in 2011 nearly all children (95%) claimed to live in a household with a digital television service, an increase from 88% in 2007. Digital television had the highest penetration of all the media devices that we looked at, although between 2010 and 2011 it remained flat, while the internet and DVRs both saw significant year-on-year increases.

[34] Ofcom's technology tracker, wave 2, 2012, households with children.
[35] Ofcom's media literacy tracker was conducted in spring 2011. It was a quantitative tracking survey conducted in 2009, 2010 and 2011.1,717 in-home interviews with parents and children aged 5-15 were conducted from March to April 2011, with 2,071 interviews conducted with parents and children aged 5-15 in April to May 2010 and from September to October 2010. In 2009, 2,131 in-home interviews with children aged 5-15 and their parents/carers were conducted from April to May and from September to October.
[36] Analysis of children's television viewing habits sourced from BARB, the UK's television measurement panel. Findings are provided for children aged 4-15 as well as the subgroups aged 4-9 and 10-15.
[37] http://stakeholders.ofcom.org.uk/binaries/research/media-literacy/oct2011/Children_and_parents.pdf p.20

Figure 31: Access to key platforms in the home, 5-15s: 2007–2011



QP3A/B/G/H – I'm going to read out a list of different types of equipment that you may or may not have in your home, and which your child may or may not use (prompted responses, single coded)
Base: Parents of children aged 5-15 (3696 aged 5-15 in 2007, 2131 aged 5-15 in 2009, 2071 aged 5-15 in 2010, 1717 aged 5-15 in 2011) - significance testing shows any differences between 2010 and 2011.
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

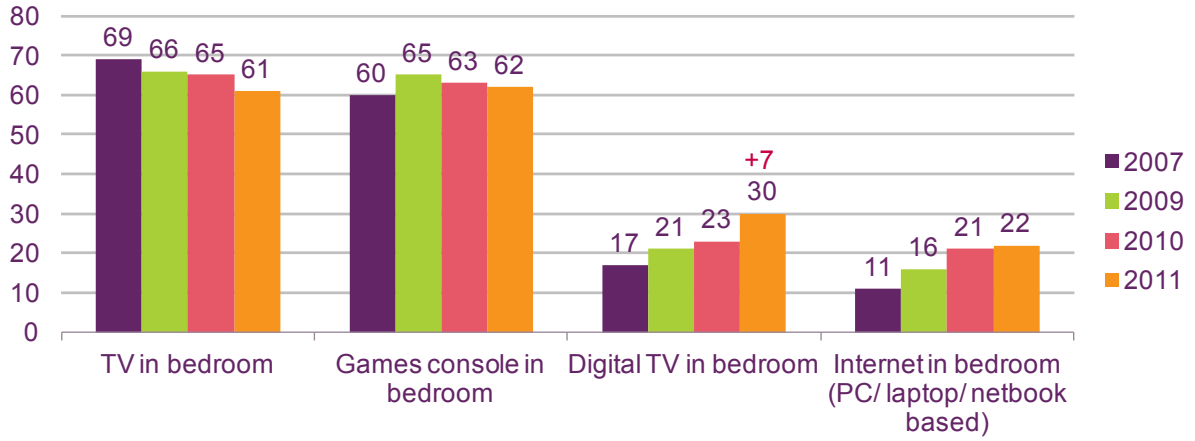
The number of children with a TV in their bedroom has declined

For many children, television is no longer just a family or communal experience. Around three in five children in 2011 claimed to have a television in their bedroom. However, this seems to be changing. There has been a significant downward trend in having a television in the bedroom since 2007, falling from 52% to 45% for 5-7s, from 69% to 61% for 8-11s and from 81% to 74% for 12-15s.

Looking specifically at digital television, the number of children who claimed to have a digital television in their bedrooms increased from 17% in 2007 to 30% in 2011.

It is also worth noting that not all of the televisions in children's bedrooms are used for watching television. Previous waves of this research have consistently shown than many of the TVs in children's bedrooms are used for purposes other than viewing TV content; such as playing games through a console or viewing DVDs. This is increasingly likely to be the case now that digital switchover has been completed and many non-digital televisions will not be able to receive a television signal.

Figure 32: Media in children's bedrooms, 5-15s: 2007–2011



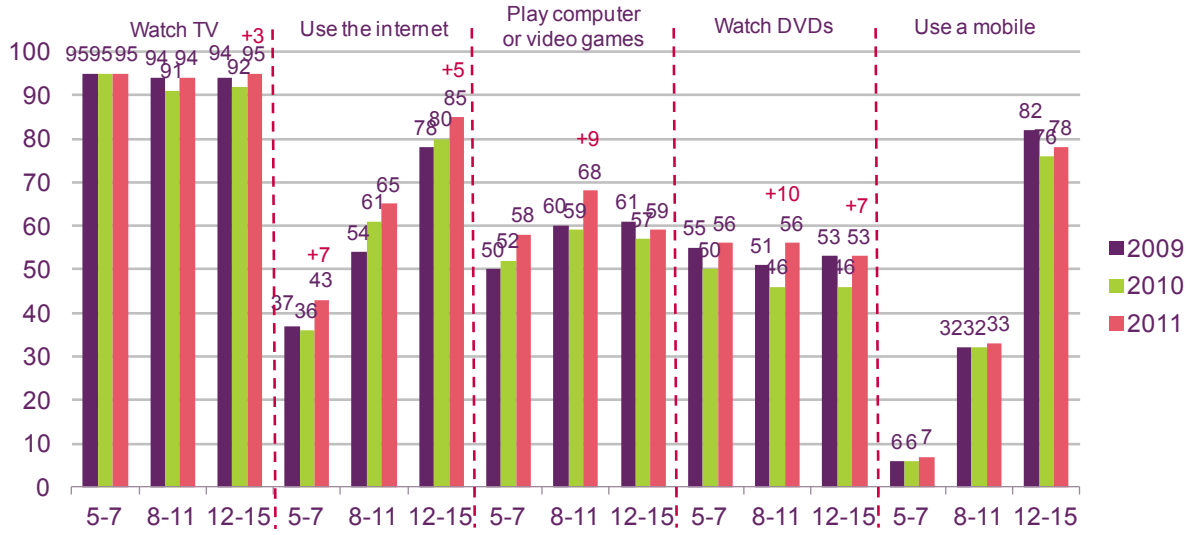
QP3A/H/I/K– I'm going to read out a list of different types of equipment that you may or may not have in your home, and which your child may or may not use. (prompted responses, single coded)

Base: Parents of children aged 5-15 (3696 aged 5-15 in 2007, 2131 aged 5-15 in 2009, 2071 aged 5-15 in 2010, 1717 aged 5-15 in 2011). Significance testing shows any change between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March – April 2011

Watching TV is the most regularly undertaken media activity among all age groups

As well as being one of the most available media devices, television continues to be one of the activities undertaken most regularly by children. Almost all children watched television every day; more than participated at least daily in any other media activity. For 12-15 year-olds, however, using the internet and using a mobile phone were also very popular daily activities, with daily use of the internet increasing by five percentage points between 2010 and 2011; to 85%.

Figure 33: Regular media activities undertaken, by age: 2009–2011

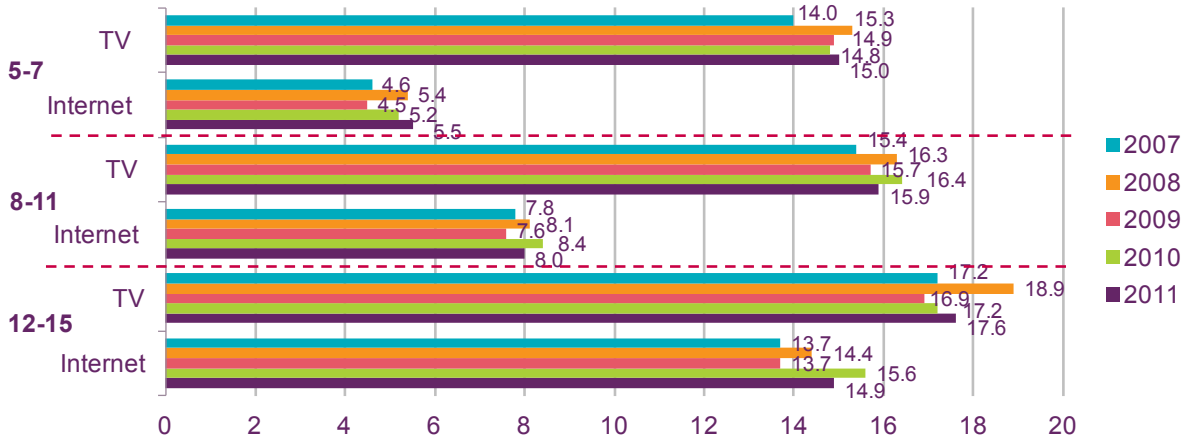


QC39A– Which of the following do you do almost every day? (prompted responses, multi-coded)
Base: Children aged 5-15 (576 aged 5-7 in 2009, 558 aged 5-7 in 2010, 573 aged 5-7 in 2011, 774 aged 8-11 in 2009, 760 aged 8-11 in 2010, 586 aged 8-11 in 2011, 781 aged 12-15 in 2009, 753 aged 12-15 in 2010, 558 aged 12-15 in 2011) – significance testing shows any differences between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

The internet is becoming increasingly important for 12-15s

Claimed time spent on television, and internet consumption, across an average week for all age groups found that television remained dominant. However, while this dominance remained strong both for 5-7s and for 8-11s, the internet showed signs of becoming increasingly important for 12-15 year-olds (see Figure 34).

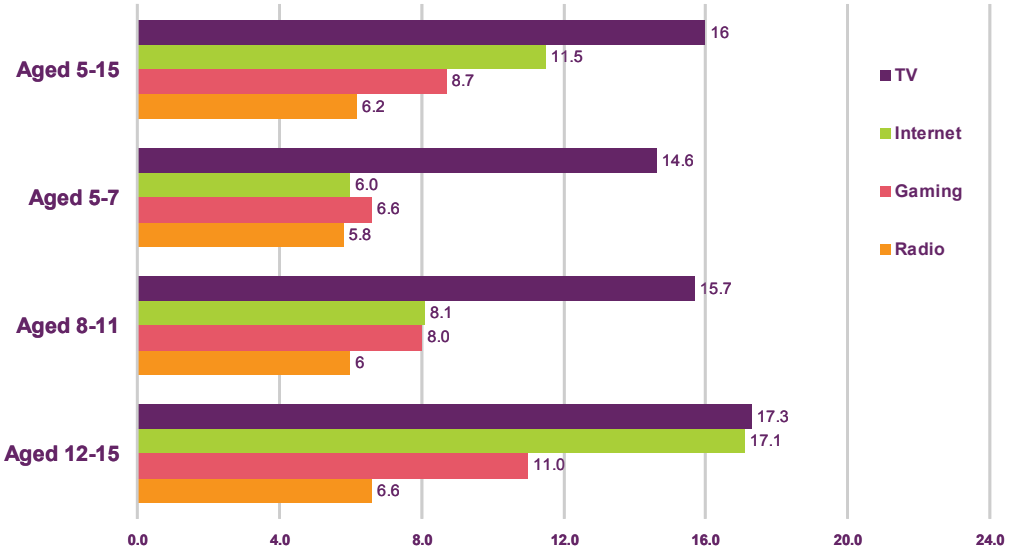
Figure 34: Estimated weekly hours of television and internet consumption, by age: 2007–2011



QP8A-B/ QC3A-B – How many hours would you say he/ she spends watching TV on a typical school day/ on a weekend day? (spontaneous responses, single coded)
QP23A-B/ QC12A-B – How many hours would you say he/ she spends using the internet at home on a typical school day/ on a weekend day? (spontaneous question, single coded)
Base: Parents of children aged 5-11 who watch TV at home and use the internet at home and children aged 12-15 who watch TV at home and use the internet at home (VARIABLE BASE) – significance testing shows any difference between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

This trend continued into 2012 as Figure 35 demonstrates; 12-15s spent 17.1 hours online in 2012, a significant increase from the 14.9 hours in 2011 (see Figure 34). This increase meant that in 2012, for the first time, 12-15s spent as much time per week using the internet as they did watching television.

Figure 35: Weekly hours using various media, internet users aged 12-15: 2012



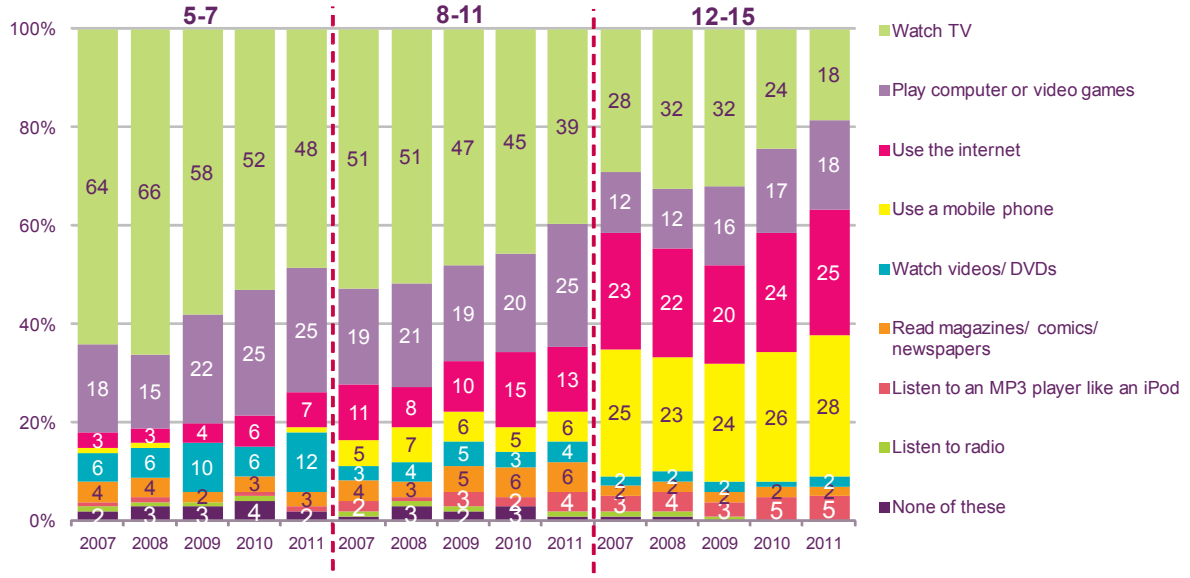
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March 2012
QP11A-B/ QC3A-B/ QP22A-B/QC8A-B/QP29A-B/QC13A-B/QP37A-B/QC45A-B – How many hours would you say he/ she spends [USING MEDIUM] on a typical school day/ on a weekend day?)
Base: Parents of children aged 5-11 who use each medium at home and children aged 12-15 who use each medium at home (VARIABLE BASE) - significance testing shows any change between 2011 and 2012

12-15s are more likely to say they would miss their mobile phones and the internet than TV

For 5-7s and 8-11s, television remained the media activity that the majority of children said they would miss the most. However, the proportion of both groups citing television gradually declined between 2007 and 2011, while the proportion citing computer games and the internet increased slightly.

Although the 12-15 age group spent most of their time watching television (see Figure 34 and Figure 35), this is not the media activity they would miss the most if it were taken away. The most-missed media activity for this group was using their mobile phone, followed by playing computer games, with television coming in a joint third alongside the internet.

Figure 36: Media activity children would miss the most: 2007–2011



QC39B – Which one of the things you do almost every day, would you miss doing the most if it got taken away? Base: Children aged 5-15 (985 aged 5-7 in 2007, 563 aged 5-7 in 2008, 576 aged 5-7 in 2009, 558 aged 5-7 in 2010, 573 aged 5-7 in 2011, 1354 aged 8-11 in 2007, 748 aged 8-11 in 2008, 774 aged 8-11 in 2009, 760 aged 8-11 in 2010, 586 aged 8-11 in 2011, 1357 aged 12-15 in 2007, 755 aged 12-15 in 2008, 781 aged 12-15 in 2009, 753 aged 12-15 in 2010, 558 aged 12-15 in 2011) – sig testing show any difference between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Children's PSB continues to be valued by the majority of parents. According to Ofcom's *PSB Tracker*, in 2011 81% of parents/carers rated UK children's PSB as important.

Figure 37: Parents' opinions on the importance of children's PSB

NB in 2010 the question was asked as part of the main Importance and Delivery section along with the other statements. In 2011 it was asked in a separate children section, after the questions on overall satisfaction had been asked. In 2010 channels asked about were BBC One, BBC Two, ITV1, Channel 4, Five, Cbeebies and CBBC. In 2011 BBC Two, ITV1 and Channel 4 were not included.

Source: Ofcom PSB Tracker 2011. Extent to which the characteristics is important, where 10 means 'extremely important" and 1 means "not at all important" (% rating 10/9/8/7)
Base: 2010 – All in Sample A (3569); 2011 – All whose children regularly watch any of those channels BBC One, Channel 5, CBeebies, CBBC, S4C regularly (363)

CBBC and CBeebies scored highly on delivering a wide range of high-quality UK-made programmes for children. In 2011 81% of parents whose children watched CBeebies regularly scored the channel 7-10 out of 10 on this statement, while 71% of parents whose children watched CBBC scored the channel 7-10 out of 10.

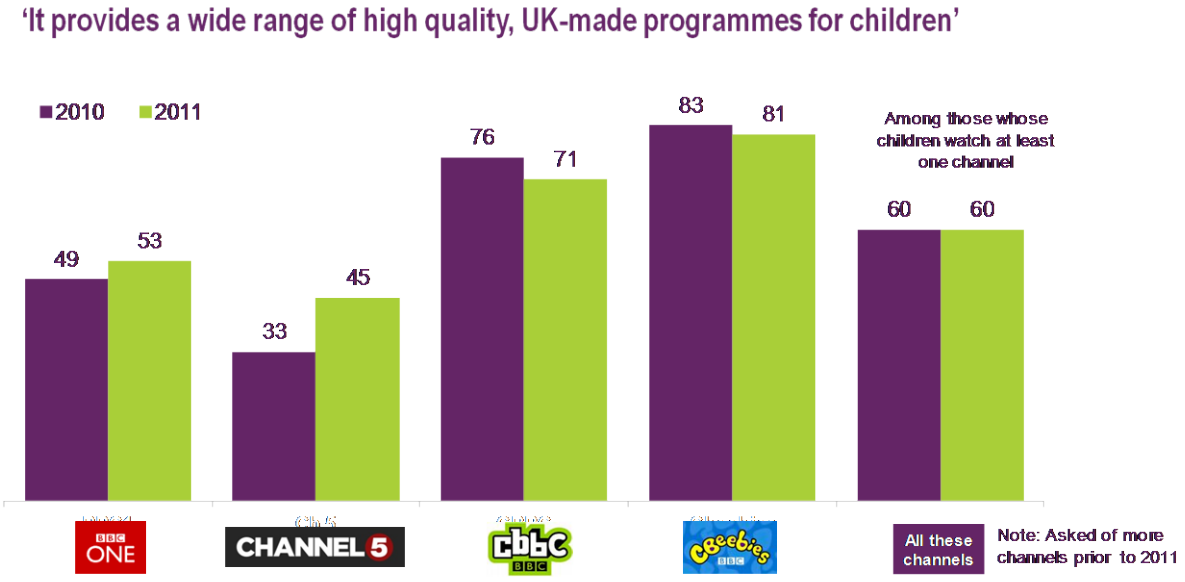
These results contrasted with lower scores for BBC One and Channel 5:

- Over half (53%) of parents/carers whose children watched children's programming on BBC One gave it a top-box score (between 7-10) for delivering high-quality UK content for children. Forty-five per cent of those with children who watched children's programming on Channel 5 gave it a top-box score (see Figure 38).

- Parents/carers of children aged 12-15 who watched UK children's content on Channel 4 were asked to rate the channel, but the base size was small (under 100) so the results should be viewed as indicative only.

    - 65% of parents thought it was important for Channel 4 to provide content for this age group
    - 44% gave it a top-box score on delivering UK children's programming for older children.

Figure 38: Parents' opinions on the delivery of children's PSB



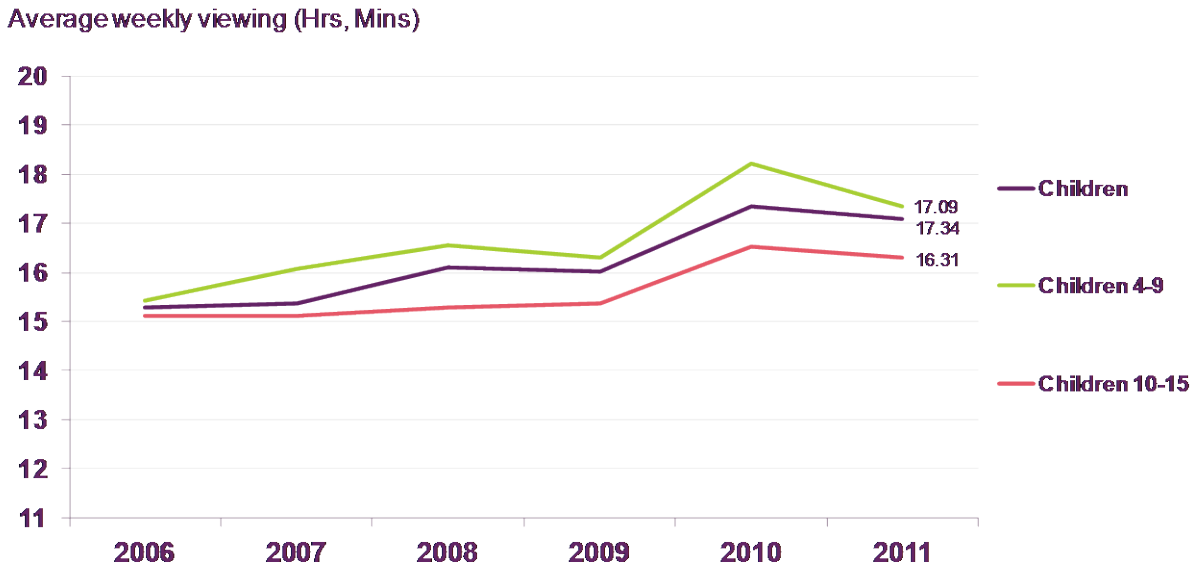
Source: Ofcom PSB Tracker 2011. Extent to which the purpose/characteristics applies to the channel(s), where 10 is the highest score and 1 is the lowest. (% rating 10/9/8/7)
Base for 'all children's' PSB channels': All respondents whose children regularly watch at least one channel (1448, 363)
Base for individual channels: Those whose children are regular viewers of each channel featured (CBBC = 805,180 CBeebies = 782, 218 BBC One = 906, 155 Channel Five = 574, 89)

The rest of the viewing section is based on BARB data (BARB is the UK's television measurement panel). This section looks at children's overall viewing, viewing to specific channel types, children's viewing within adult and children's airtime, and viewing by sub-genre.

Television continues to be an important medium for children – time spent by children watching TV has gradually increased since 2006

According to BARB, children (4-15s) spent just over 17 hours per week watching television in 2011. The data suggest that children's viewing may have increased after a period of stability between 2006 and 2009 when it stood at around 15.5 hours per week. Trend comparisons must be made with caution due to the introduction of a new BARB measurement panel in January 2010.

Figure 39: Average hours of weekly viewing, by age: 2006–2011



Source: BARB. NB: new BARB measurement panel was introduced in January 2010)

Despite an increase in take-up of digital television recorders, 86% of children's time spent watching television is spent on live TV

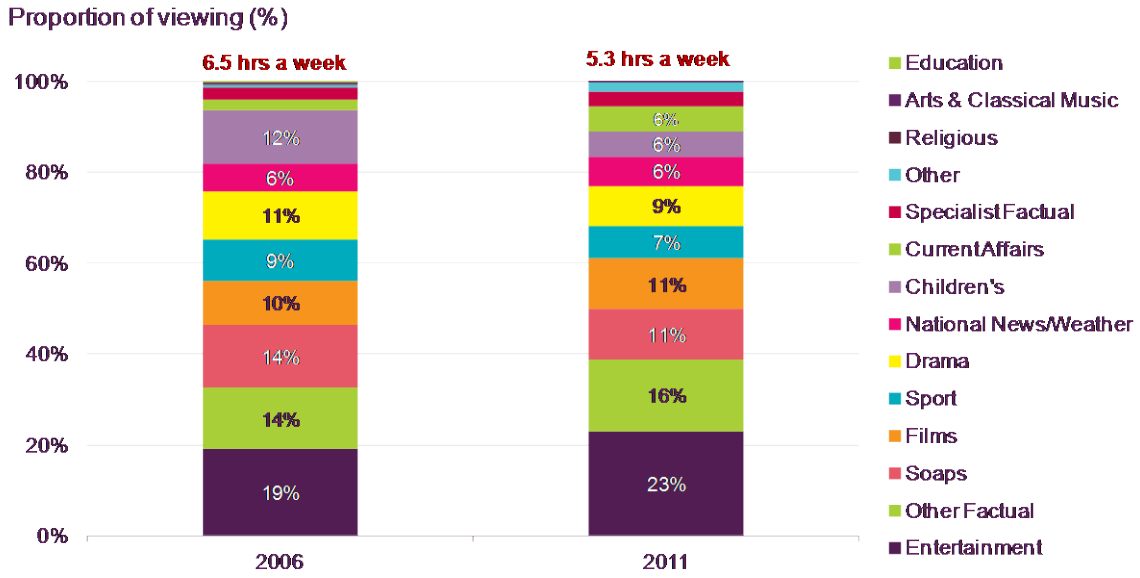
Live TV was still the main method of watching television for children (4-15s). BARB results show that 86% of the time children spent watching TV in 2011 was spent watching live TV. This has remained broadly level since 2006. By channel, the proportion of time-shifted content watched by children in 2011 was highest for BBC One and Channel 4, whereas the majority of time spent watching CBeebies and CITV was live.

Entertainment was the most popular genre across the five main PSB channels

Children watch a wide range of programme genres on television. In 2011, across the main PSB channels, the most popular genre was entertainment (representing 23% of total time spent watching the main PSBs), followed by 16% of time spent on other factual, 11% on soaps and 11% on films.

Viewing of the children's genre across the main PSB channels has halved since 2006, while viewingof entertainment has increased by four percentage points over the same period (see Figure 40 below). The drop in viewing of children's programming is likely to be driven by the decrease in children's hours offered on these channels over this period.

Figure 40: Viewing by genre on the main five PSB channels, all children 4-15: 2006 vs. 2011



Source: BARB, All children (4-15), Network. Main five PSB channels (BBC One, BBC Two, ITV, Channel 4, Channel 5). Network viewing-excludes nations/regions programming.

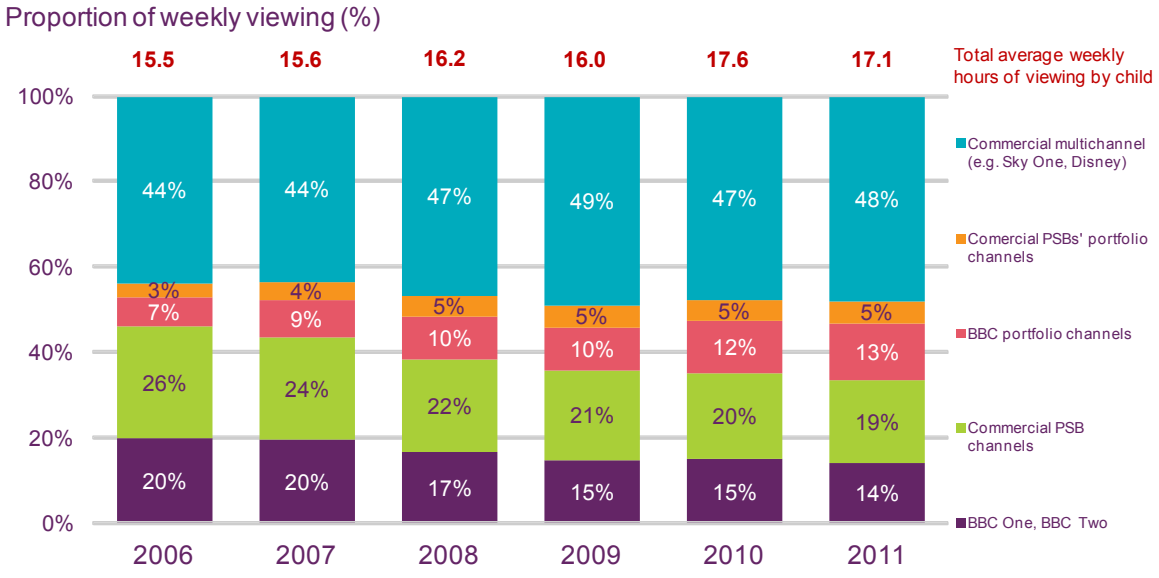
Children spend over half of their time watching the commercial multichannels

While nearly a third of children's total viewing time is spent watching the main five PSB channels, on average, children generally spend more time watching programmes on the commercial multichannels.

In 2011, children spent the greatest proportion of their time watching the commercial multichannels (48%). This has remained broadly level over the past five years. Viewing to BBC One and BBC Two combined has declined gradually, from 20% in 2006 to 14% in 2011, while viewing to the BBC digital channels increased from 7% to 13% over the same period.

The increase in viewing to the BBC portfolio channels was even greater among younger children; 15% of 4-9 year-olds watched the BBC digital channels in 2011 compared to 9% of 10-15 year-olds.

Figure 41 Children's total weekly viewing, by channel type: 2006–2011



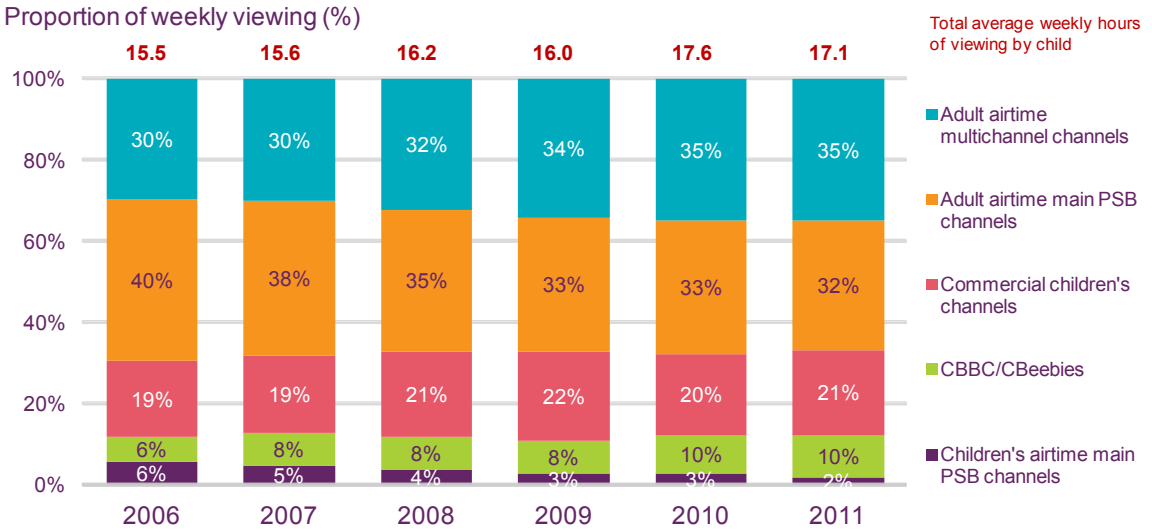
Source: BARB 2006-2011, all children 4-15

Over two-thirds (67%) of children's total viewing takes place in 'adult' airtime

Overall, children spent an average of 5.8 hours watching children's airtime in 2011.[38] This is an increase since 2006 (4.6 hours) and is in line with the increase in TV viewing overall over the period.

Children continued to spend more time watching non-children's programming than programming produced specifically for them. Overall, two-thirds (67%) of children's total viewing took place in 'adult' airtime; this has remained fairly stable since 2006.

Figure 42: Children's weekly viewing in adult and children's airtime: all children 4-15



These results differed by age of child and by the TV platform received at home:

- In 2011, older children aged 10-15 spent more time viewing in adult airtime (81%) compared to 4-9 year-olds (55%). This is likely to be because older children stay up later to watch TV, and are growing out of watching dedicated children's channels.

- Children in digital terrestrial television (DTT) homes spent more time watching TV in adult airtime (71%) than did children in digital satellite and cable homes (64% and 65% respectively). These figures suggest that the greater availability of children's programming in cable/ satellite homes can lead to greater time spent watching children's content.

Figure 43 below shows that the PSB channels ITV and BBC One still command the biggest shares of viewing, which is likely to be driven to an extent by family viewing of programmes such as *Doctor Who*, *Britain's Got Talent*, *The X Factor* and *I'm a Celebrity*... which consistently achieve the highest children's audiences among all ages (see

Figure 44).

Figure 43 also indicates that children's viewing to the commercial multichannels differs by age group; younger children (4-9 year-olds) tended to watch more dedicated children's

[38] Children's airtime consists of the children's programme slots on the main terrestrial channels and the dedicated children's channels on the digital platform. Adult airtime consists of all the main terrestrial channels excluding the slots when children's programmes are shown, combined with all digital channels except for the dedicated children's channels.

channels, whereas older children (10-15 year-olds) preferred to watch channels aimed more at younger adults (E4, BBC Three, Sky1, Dave, etc)

Figure 1: Top 15 channels among children, by share: 2011

Children 4-9			Children 10-15		
Channels		Share %	Channels		Share %
1	ITV1 (SD+HD)	11.1	1	BBC1 (SD+HD)	12.7
2	BBC1 (SD+HD)	11.0	2	ITV1 (SD+HD)	12.5
3	CBeebies	5.8	3	CH4	5.5
4	CBBC	4.6	4	Disney Channel Total	5.4
5	CH5	4.6	5	CBBC	5.0
6	CH4	4.4	6	BBC3	3.4
7	Disney Channel Total	3.7	7	CH5	3.3
8	CITV	3.0	8	E4 Total	3.3
9	Disney Junior Total	2.3	9	BBC2	3.2
10	BBC2	2.3	10	ITV2 Total	2.9
11	Boomerang Total	2.2	11	Sky 1	2.7
12	Nick Jr Total	2.2	12	Nickelodeon Total	1.8
13	Nickelodeon Total	2.2	13	Dave Total	1.7
14	Disney XD Total	2.0	14	Film4 Total	1.3
15	Sky 1	1.7	15	Disney XD Total	1.2

Source: BARB, 2011

Figure 2: Top 15 programmes among all children 4-15: 2011

Title		Channel	Date	Start time	End time	000s	Rating (%)	Share (%)
1	DOCTOR WHO	BBC1 (SD+HD)	25/12/2011	18:59:47	19:58:09	1921	22.5	50.3
2	BRITAIN'S GOT TALENT	ITV1 (SD+HD)	07/05/2011	20:00:45	20:59:38	1820	21.4	65.1
3	THE X FACTOR RESULTS	ITV1 (SD+HD)	11/12/2011	19:29:00	21:29:40	1762	20.6	60.6
4	THE X FACTOR	ITV1 (SD+HD)	10/09/2011	20:15:00	21:15:09	1757	20.6	62.4
5	THE GRUFFALO'S CHILD	BBC1 (SD+HD)	25/12/2011	18:31:32	18:57:28	1611	18.8	47.5
6	I'M A CELEBRITY - GET ME OUT OF HERE!	ITV1 (SD+HD)	03/12/2011	21:31:45	22:31:07	1572	18.4	64.6
7	COMIC RELIEF	BBC1 (SD+HD)	18/03/2011	18:58:55	21:59:04	1557	18.4	57.9
8	BRITAIN'S GOT TALENT RESULT	ITV1 (SD+HD)	04/06/2011	21:29:55	22:01:39	1542	18.1	59.6
9	EASTENDERS	BBC1 (SD+HD)	25/12/2011	21:01:11	22:02:34	1402	16.4	45.2
10	THE ROYAL WEDDING (BBC)	BBC1 (SD+HD)	29/04/2011	08:00:01	13:39:05	1400	16.5	51.2
11	CHILDREN IN NEED	BBC1 (SD+HD)	18/11/2011	19:29:03	21:59:05	1391	16.3	47.6
12	THE X FACTOR STANDBY FILLER	ITV1 (SD+HD)	12/11/2011	20:14:30	20:26:14	1280	15.0	42.7
13	NEW YEAR LIVE	BBC1 (SD+HD)	31/12/2011	23:53:20	24:14:42	1263	14.8	56.9
14	FILM: KUNG FU PANDA (2008)	BBC1 (SD+HD)	18/06/2011	18:36:26	19:58:15	1254	14.7	48.5
15	STRICTLY COME DANCING	BBC1 (SD+HD)	17/12/2011	19:00:15	20:06:18	1205	14.1	37.4

Source: BARB, 2011

Viewing to the children's genre

The analysis below takes a closer look at levels of viewing to the children's genre.

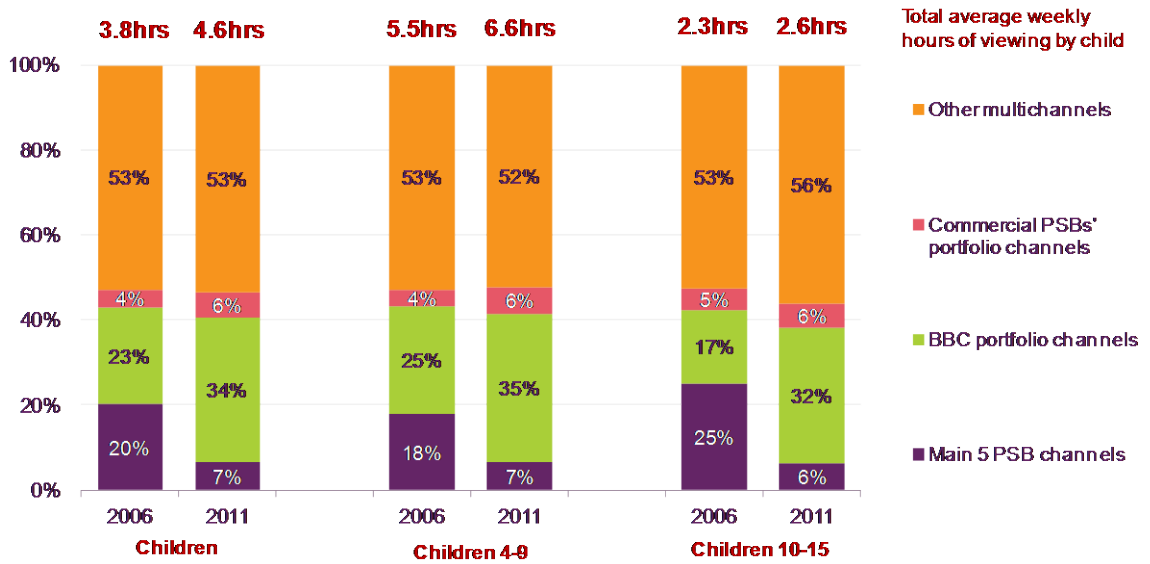
More than half of the time that children spent watching the children's genre was on the commercial children's channels

Children's viewing to the children's genre on the main five PSB channels has continued to decline since 2006; the 20% of time spent watching children's content in 2006 dropped to just 7% in 2011. This is in line with the reduced amount of first-run originated children's programming aired on ITV and BBC One and Two over this period.

As digital switchover progressed, the availability of CBBC and CBeebies increased, and the share of children's viewing of the children's genre on these channels rose; from 23% in 2006 to 34% in 2011. This shift is evident across all age groups, but is greater among older children, whose share of viewing increased from 17% in 2006 to 32% in 2011.

In 2011, more than half of the time that children spent watching the children's genre was spent watching the commercial children's channels, with little change over the five-year period. However, the PSB channel portfolio has a smaller offering of dedicated children's programmes than that which is available on the commercial multichannels, where there is not only more content available, but some of the channels broadcast 24 hours a day.

Figure 43: Share of viewing to the children's genre, by channel group,:2006 vs. 2011



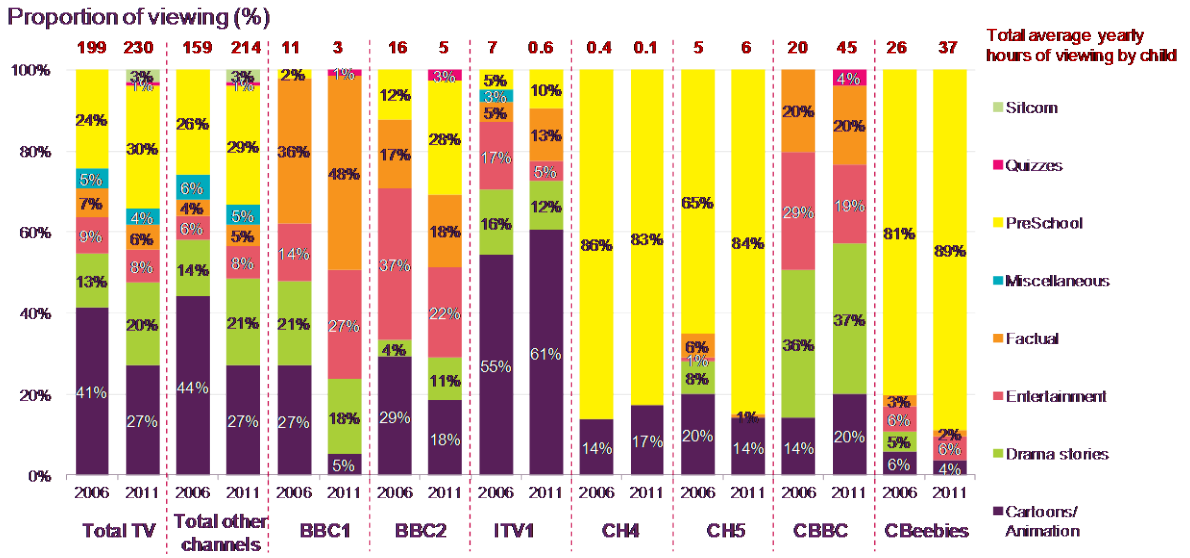
Source: BARB, Children (4-15), 2006: Network Plus, 2011: Network. Main five PSB channels (BBC One, BBC Two, ITV, Channel 4, Channel 5). BBC portfolio channels (BBC Three, BBC Four, CBBC, CBeebies). Commercial PSBs' portfolio channels (ITV+1, ITV2, ITV3, ITV4, CITV, C4+1, E4, More4, Film4, C5+1, 5, 5USA)*
Based on total minutes of viewing to Children's. See Definitions: PSB genres analysis.
New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution.

Viewing of children's drama increases most over a five year period

In 2011, just under one-third (30%) of all viewing within the children's genre was spent watching pre-school programmes, followed by cartoons/ animation at 27% and drama at 20%.

Cartoons/ animation had the biggest decrease (14 percentage points) over five years, while drama viewing increased by 7pp to 20%. This was the biggest increase across all the children's sub-genres between 2006 and 2011, and it appears to suggest a growing appetite for children's drama among children aged 4-15.

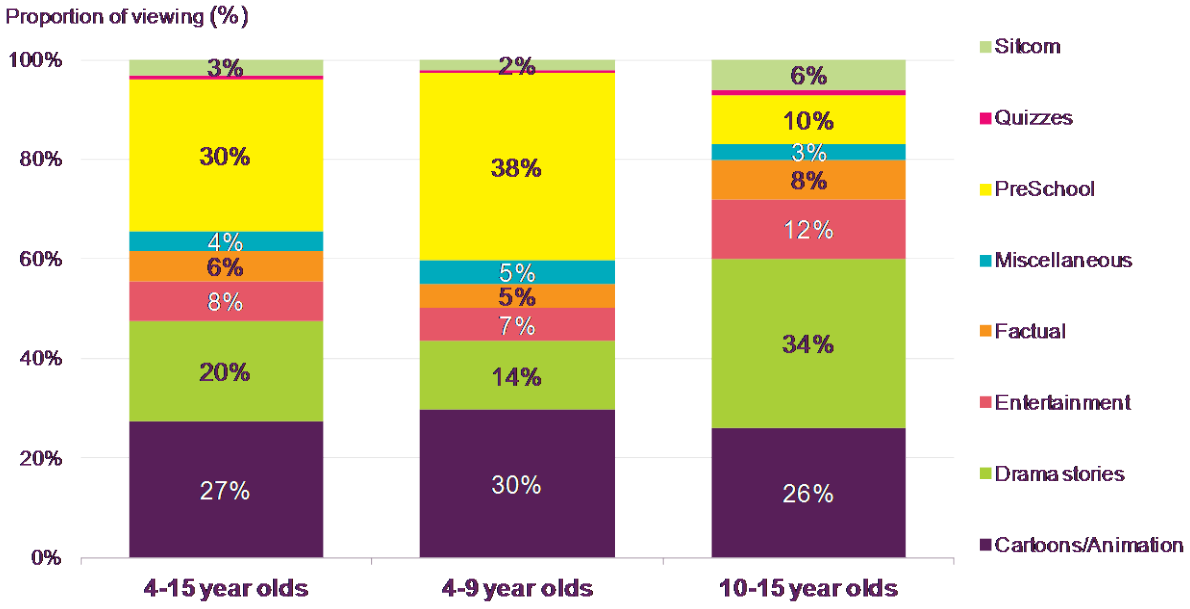
Figure 44: Children's viewing of the children's genre, by sub-genre, all children 4-15: 2006 vs. 2011



Source: BARB, All children (4-15), Network. Based on total minutes of viewing to 'Children's'.

In 2011, pre-school programmes were more popular with younger children (38% of viewing to the children's genre) whereas older children spent the majority of their time watching children's drama programmes (34% of time spent watching children's content among 10-15 year-olds was to drama programmes – see Figure 47).

Figure 45: Children's viewing of the children's genre, by subgenre and age: 2011



Source: BARB, All children (4-15), Network. Based on total minutes of viewing to 'Children's'.

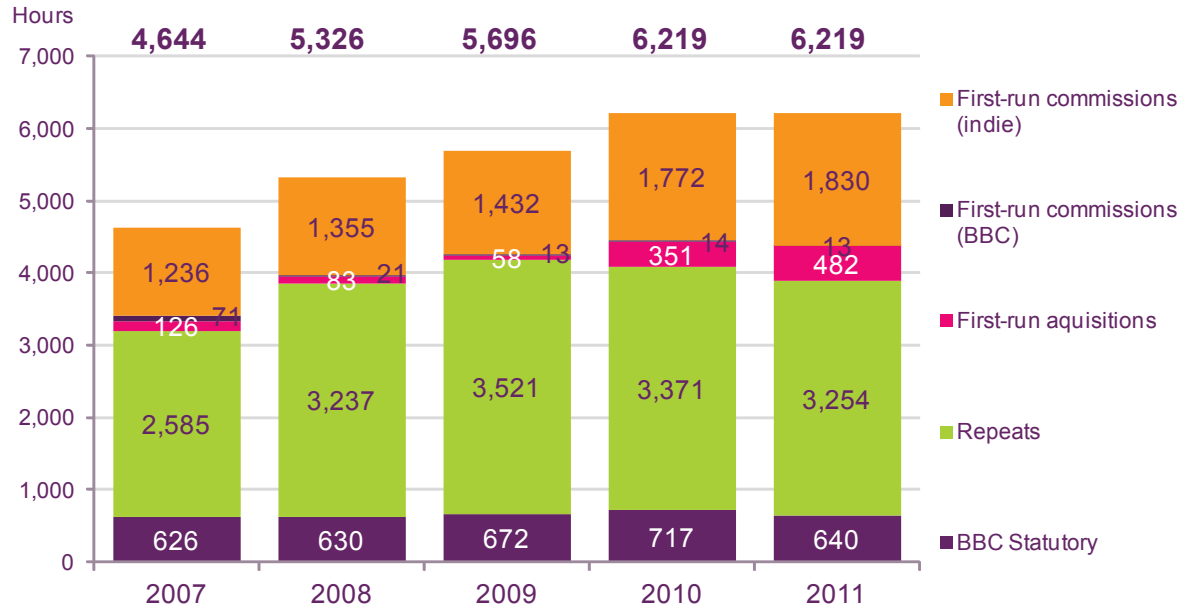
8 S4C

Sianel Pedwar Cymru (Channel 4 Wales) is more commonly known as S4C. It is a Welsh-language public-service channel that features a wide range of programmes. The following section outlines S4C's overall output, and specifically its provision of children's content.

In 2011 the total number of hours broadcast by S4C was 6,219 hours. Repeats made up the majority of the channel's output in 2011 (52%). Although repeats decreased by 3% year on year, over a four-year period repeats have increased by just over a quarter (26%).

The number of first-run acquisitions saw the biggest relative increase across the categories (37%), bringing the 2011 total to 482 hours; this has increased threefold since 2007. First-run independent commissions also increased by 3%; from 1,772 hours in 2010 to 1,830 hours.

Figure 46: Welsh-language output on S4C, by hours and type; 2007–2011



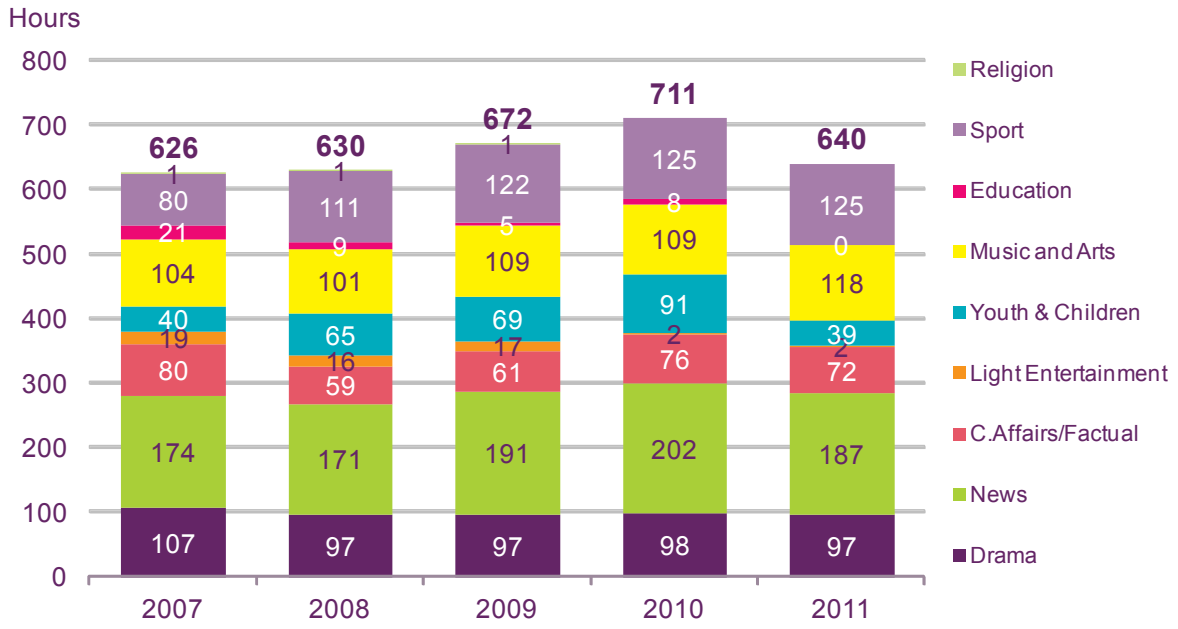
Source: S4C Annual Report 2007 – 2011.
(http://www.s4c.co.uk/abouts4c/authority/e_annualreports.shtml)

The BBC has a statutory obligation to provide S4C output across a range of genres, which is funded out of the BBC's licence revenue.[39] The 2011 obligation was to provide S4C with ten hours of output per week (520 hours per year) which the BBC exceeded by 120 hours in 2011, totalling 640 hours.

However, between 2010 and 2011 the number of BBC hours of children's programming fell by more than half (-57%).

[39] Strategic Partnership Deed of Agreement between the BBC and S4C, renewed in 2011.

Figure 47: BBC statutory hours for S4C; 2007–2011



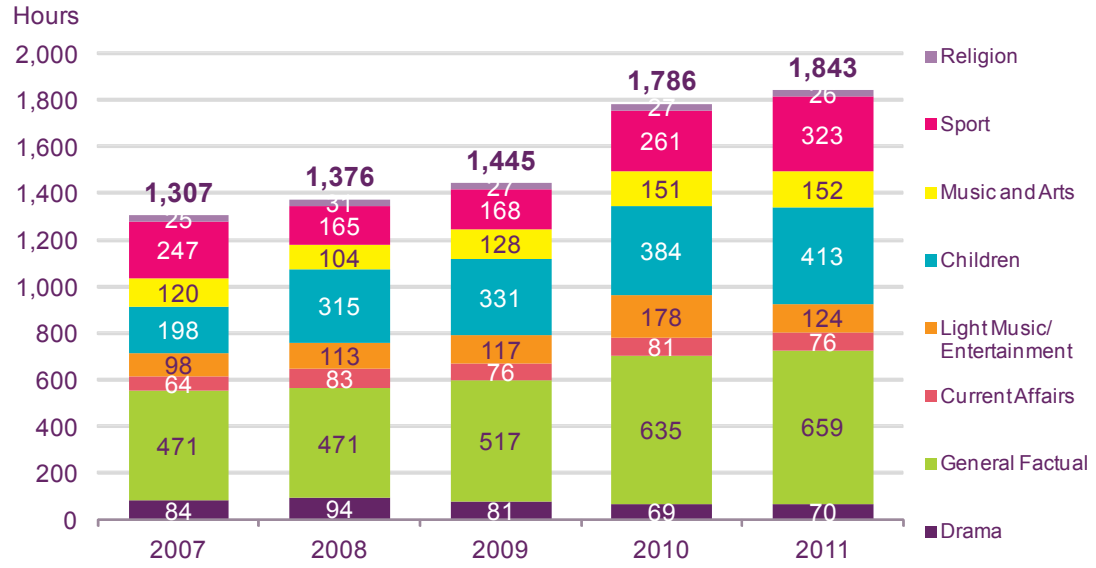
Source: S4C Annual Report and Accounts 2007 – 2011 Note: BBC statutory hours for S4C are reported by calendar year in the S4C Annual Report. The financial value of the BBC's contributed programming is reported by financial year. (http://www.s4c.co.uk/abouts4c/authority/e_annualreports.shtml).

The number of first-run Welsh-language commissions in 2011 increased by 3% year on year, up by over two-fifths (41%) since 2007. In terms of overall first-run commissions, with the exception of current affairs, light music and entertainment, and religion, all genres saw annual increases in the number of first-run hours broadcast, with total first-runs increasing from 1,786 hours in 2010 to 1,843 hours in 2011.

The number of hours of first-run Welsh-language children's programming also increased by 8% year on year. In 2008, S4C invested more in children's programming after launching a Welsh-language series for children; *Cyw*. This was behind the big increase in Welsh-language children's output in 2008 (up 59% from the previous year) which has continued to increase each year since 2007.

S4C initially specialised in programming for pre-school children, but in 2010 branched out to encompass older children by commissioning 156 hours of original programming per year, aimed at 7-15 year-olds. While *Cyw* provides programmes aimed at younger viewers, *Stwnsh* offers a range of programming aimed at older children and teenagers, which includes titles such as *Gwylltio* and *Y Sqwad*.

Figure 48: First-run hours of S4C Welsh language programming; 2007 – 2011



Source: S4C Annual Report and Accounts 2007 – 2011. First-run commissions. (http://www.s4c.co.uk/abouts4c/authority/e_annualreports.shtml).

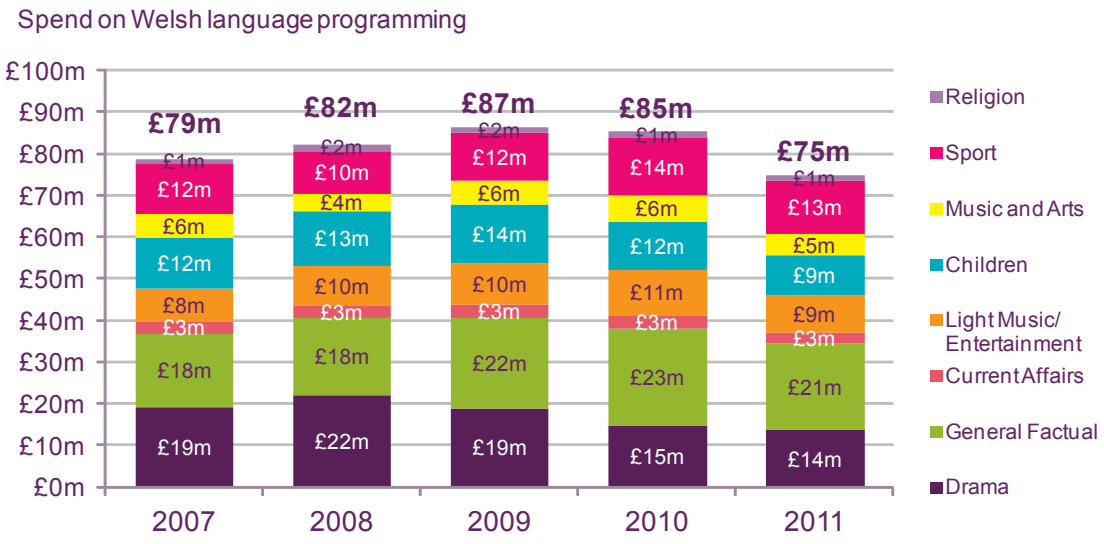
Spend on, and hours of, Welsh-language output

S4C spent £75m on first-run commissioned programming in 2011[40]; a 12% year-on-year fall in real terms (see

Figure 51). All genre categories experienced a year-on-year decrease in real terms, including spend on children's programmes, which decreased by 19%. Spend on Welsh-language children's programming also decreased by 29% between 2007 and 2011; from £12m to £9m in real terms, giving it the second biggest relative decrease, after drama, over this period.

In July 2013, S4C announced that it would allocate £4m over a four-year period to invest in digital projects aimed at children and young adults.[41]

Figure 49: Spend by S4C on first-run Welsh-language programming: 2007 – 2011



[40] £75m excludes the BBC's 2011 statutory contribution.
[41] http://www.s4c.co.uk/abouts4c/annualreport/acrobats/s4c-annual-report-2012.pdf

Source: S4C Annual Report and Accounts 2007 – 2011. All figures expressed in 2012 prices. (http://www.s4c.co.uk/abouts4c/authority/e_annualreports.shtml).

Glossary

Acquired programmes Purchased or bought-in programmes which have not been produced or commissioned by the broadcaster.

Adult airtime Comprises all the main terrestrial channels excluding the slots when children's programmes are shown combined with all digital channels except for the dedicated children's channels.

BARB (Broadcasters' Audience Research Board) The pan-industry body that measures television viewing.

Children's airtime Comprises the children's programme slots on the main terrestrial channels and the dedicated children's channels on the digital platform.

PSB survey Quantitative survey conducted BDRC Continental on PSB provision. It includes questions on children's PSB among parents.

COBA The Commercial Broadcasters Association is the industry body for commercial broadcasters who invest in the UK, independent of public funding or incentives. It represents multichannel broadcasters in the digital, cable and satellite TV sector.

Commercial children's channels Commercial channels dedicated to the broadcast of children's content (does not include CBBC and CBeebies).

Commercial PSBs ITV/ ITV Breakfast, Channel 4 and Channel 5.

Dedicated children's channels All channels dedicated to the broadcast of children's content (includes CBBC and CBeebies).

Digital terrestrial television (DTT) Means digital television which is currently most commonly delivered through the Freeview service.

DVRs Digital video recorders.

First-run original First-run original programmes are defined as transmissions first shown in the UK on that channel.

Original programmes These are programmes which are commissioned from the broadcasters' in-house facilities or commissioned from independent production companies.

PSB channels BBC One, BBC Two, ITV/ ITV Breakfast, Channel 4, Channel 5, S4C, CBBC, CBeebies, BBC Three, BBC Four, BBC Parliament, BBC News.

PSB main channels BBC One, BBC Two, ITV/ ITV Breakfast, Channel 4, Channel 5.

PSB Public service broadcasting.

Repeats Are second and subsequent broadcasts of the same programme on that channel are counted as repeats. Programmes that are simulcast on two channels at the same time are only counted once. Programmes which were first shown on one channel and then rebroadcast on another channel are counted as repeats for the first showing on the second channel. Within a channel group, for example the BBC, a programme shown first on CBBC and subsequently on BBC Two is considered a repeat on BBC Two. Repeat levels on BBC One and BBC Two are affected by premiering shows on the digital channels.

Sub-genres The types of children's programmes: pre-school, drama, factual, entertainment and animation.

Time-shifted viewing Defined in BARB analysis as viewing of programmes recorded and subsequently played back within seven days of broadcast, as well as viewing after pausing or rewinding live TV. Viewing any catch-up TV player services through the television set, including those accessed through apps on smart TVs and games consoles, and any viewing on a laptop or personal computer connected to the television set, are also captured, if the content has been broadcast live in the last seven days. Viewing outside the seven-day window is not measured at the time of analysis.