

The Children's Media Summit '24 endorses the following analysis of the impact of changing audience behaviour on the children's media industry and UK society.

Ahead of the summit, the Children's Media Foundation undertook a series of roundtables with producers and broadcasters of children's content, including the BBC, ITV, C4, C5, Sky, Pact, Animation UK and the UK Children's Media Plan, which informed this analysis.

We believe that the current media lives of children and young people are contributing to the 'crisis of childhood' which is reflected in young people's mental well-being, engagement with society and culture, and formation of values.

As Ofcom has reported, the children's audience has significantly shifted its viewing to online platforms which has reduced the number of young people watching linear public service channels. By 8 years-old, the majority of UK children have their own mobile phone, providing unlimited access to a wide range of media content on largely unregulated platforms including YouTube, TikTok and Roblox.

While children have more choice than ever before - and there are many examples of good children's content online – this shift has also led to a dramatic increase in the consumption of age-inappropriate content and generic or US-focused content, rather than content focused on the needs of a UK audience.

In parallel, Ofcom has identified that, as a result of the economic pressures on PSBs, the wider free-to-air market, and increased competition for viewing and income, there has been a reduction in the volume of regulated, UK-originated content made for children and young people that reflects their lives and our shared values.

Children are forced to navigate the pressures and complexities of an adult-focused media life and content which is not tailored to their needs, with little support from age-appropriate and culturally relevant content specifically designed for young people in the UK.

We believe the decline in the availability and discoverability of culturally relevant content for young people impacts on their individual and shared UK identity and contributes to a sense of isolation with increasing levels of anxiety and mental health challenges.

There is a vital role for positive, age-appropriate and culturally-relevant content to support children and young people. We can help them cope with the unique challenges they are facing allowing them to thrive in the changed media landscape. Under the prevailing market conditions, production and distribution of such content needs additional support.

We believe today's children's audience should be given access to the same range of culturally relevant, trusted and life-affirming content that was made available to previous generations, in a form and on platforms that reflect the way children and young people live today.