
Children's content review: update

Assessing the current provision of children's programmes on TV and online

About this document

This document provides an update on Ofcom's review of children's content, setting out our main findings and next steps.

Further details on the review including the Invitation to Contribute and stakeholder responses, can be found on Ofcom's website.¹

¹ <https://www.ofcom.org.uk/consultations-and-statements/category-2/childrens-content-review>

Contents

Section

1. Executive summary	1
2. Review background	6
3. Children's changing viewing habits	9
4. The role of PSBs in children's programming	14
5. Findings	17
6. Conclusions and next steps	29

1. Executive summary

Review background

- 1.1 Ofcom's review of children's content focuses on how the UK's public service broadcasters (PSBs) deliver a range of programmes to children at a time of changing audience habits and children's increasing viewing of videos on-demand and online.²
- 1.2 The review set out to assess how we might use the new power provided in the Digital Economy Act 2017 (DEA), which gave Ofcom a power to publish criteria for the provision of children's programming and, if appropriate, to set related conditions (e.g. quotas) on the licensed public service channels (Channel 3 services, Channel 4 and Channel 5).³
- 1.3 Our Invitation to Contribute⁴ summarised our evidence on children's evolving media use, the availability of children's programming, and industry trends. We asked for input on several questions on these themes. A range of broadcasters, producers and other industry stakeholders responded.
- 1.4 We have now reviewed these contributions, alongside our research on children's attitudes and use of media, and data on PSBs' investment in children's programmes. Here we provide an update on the review, summarising our main findings, conclusions and next steps.

Children's viewing habits have fundamentally changed

- 1.5 Children are not one audience, but several. They range in age from pre-schoolers to teenagers, and have diverse backgrounds, interests, expectations and behaviours. Children have a wide choice of what to watch and how to watch it, with a range of platforms, apps and video-on-demand (VoD) services available. Children are watching less live, scheduled television and more on-demand and online content. Between 2010 and 2017, television viewing dropped by 40% for children aged 4-9 and by 47% for children aged 10-15.⁵
- 1.6 The growth of on-demand and online services has brought many benefits, including a greater range of content from around the world and more freedom over when and how children and families watch it. YouTube is now used by 71% of 5-7s, rising to 90% of 12-

² The public service channels are those providing Channel 3 services, Channel 4, Channel 5, S4C and the BBC. While all BBC public service television channels are PSB channels, only the main channels of each of the other PSBs have this status. The commercial PSBs are those providing Channel 3 services, Channel 4 and Channel 5.

³ Section 90 of the DEA introducing new section 289A of the Communications Act 2003. Available at:

<http://www.legislation.gov.uk/ukpga/2017/30/part/6/crossheading/provision-of-childrens-programmes/enacted>

⁴ Ofcom, 2017. *Invitation to Contribute: Children's content review*. Available at: <https://www.ofcom.org.uk/consultations-and-statements/category-2/childrens-content-review>

⁵ Source: BARB. Network, average daily minutes per person of total TV.

15s,⁶ and almost half of households with children have Netflix.⁷ Our research shows these two platforms are older children's destination of choice for a wide range of content types, such as content that 'makes you laugh', 'gives you something to talk about with friends' or 'inspires you to try something new'.⁸

- 1.7 Children are still watching television programmes, both broadcast and online, but they are also dedicating time to new types of content. For example, many children watch 'unboxing' videos on YouTube, where toys are taken out of packaging and played with, or videos of people playing computer games or describing their morning routines.⁹
- 1.8 The evidence points to a structural shift in the viewing habits of young audiences – both *what* they watch and *how* they watch it. Understanding these habits and attitudes is challenging, with such a wide choice of content available across a large number of platforms – but with very little publicly available data.

Online viewing can bring benefits for children, but increases risks around viewing harmful material

- 1.9 While online platforms, such as video sharing sites and social media, offer flexibility and access to a wide range of content, they also pose greater risks to children. This is because these providers operate under a much lower level of regulation in the UK than broadcasters.
- 1.10 Given their rapid growth and the increasingly important role they play in young people's lives, we believe online providers should do more and be more accountable when it comes to guarding for the quality of content on their services, and helping to reduce the risk of exposing children to harmful material. This autumn, we will contribute to the ongoing debate about how independent regulation could play a role in helping to protect people, including children, when they are online.

The PSBs have a crucial role to play

- 1.11 The PSBs, with their broad purposes set by Parliament, have a special role to play for children in the UK. They are well-known and trusted voices and their programming is valued highly by audiences.¹⁰ Over two-thirds of children in the UK watch programmes on

⁶ Ofcom, 2017. *Children's and parents' media use and attitudes*, page 82. Available at: https://www.ofcom.org.uk/_data/assets/pdf_file/0020/108182/children-parents-media-use-attitudes-2017.pdf

⁷ Source: Ofcom Technology Tracker H1 2018 Base: all households with children (948).

⁸ Ofcom, 2017. *Children and Parents: Media Use and Attitudes Report*, section 7. Available at: https://www.ofcom.org.uk/_data/assets/pdf_file/0020/108182/children-parents-media-use-attitudes-2017.pdf

⁹ Ofcom, 2017. *Children and Parents: Media Use and Attitudes Report*, section 7.

¹⁰ Ofcom, 2018. *Media Nation UK: 2018*, page 5. Available at: https://www.ofcom.org.uk/_data/assets/pdf_file/0014/116006/media-nations-2018-uk.pdf

the PSB channels every week.¹¹ PSBs therefore have solid foundations on which to develop their plans for young audiences.

- 1.12 Continued investment by the PSBs in new, UK-made programmes for children matters. It is important that children have access to high-quality, original programmes that reflect their lives and help them navigate the world in a way that is relevant to them.
- 1.13 As a publicly-funded broadcaster that occupies a unique position in the UK media landscape, we expect the BBC to lead the way in this regard – and we increased requirements accordingly around programmes for children when we set the BBC Operating Licence in 2017.¹² Providing high-quality children's programmes cannot be left to the BBC alone, however, and the commercial PSBs should provide an alternative source.

Findings

- 1.14 There has been a continuing decline in PSBs' investment in original children's programming.¹³ The collective annual spend on new, UK-made children's programming on PSB channels has fallen from £116m in 2006 to £70m in 2017.¹⁴ The BBC remains the most significant player in terms of investment and hours across all children's genres.
- 1.15 The commercial PSBs' provision of UK children's programming varies:
- a) **ITV** has reduced the amount of new UK-made children's programmes on its main channel from 158 hours in 2006 to 47 hours in 2017. ITV also has a commercial children's channel, CITV, aimed at 6-12-year olds. Only a small proportion of the programmes on CITV shown in 2017 was new and UK-made.¹⁵
 - b) **Channel 4** does not show any new UK-made programmes made specifically for children. Channel 4 Corporation (C4C) has a duty to provide content that appeals to older children (which Channel 4 defines as aged 10-14) and showed 21 total hours of this in 2017.¹⁶
 - c) **Channel 5** has reduced the number of hours of new UK-made programmes primarily aimed at pre-school children from 150 in 2006 to 32 in 2017.¹⁷

¹¹ Source: BARB. Network. Reach criteria: 15+ consecutive minutes, full weeks used.

¹² Ofcom, 2017. *Operating licence for the BBC's UK Public Services*, page 44. Available at: https://www.ofcom.org.uk/data/assets/pdf_file/0017/107072/bbc-operating-licence.pdf. The full range of the BBC's requirements for children's programming came into effect in 2018. We will be reporting on their annual conditions and overall performance in autumn next year.

¹³ Ofcom, 2018. *Media Nation UK: 2018*. Available at: https://www.ofcom.org.uk/data/assets/pdf_file/0014/116006/media-nations-2018-uk.pdf

¹⁴ Source: Ofcom/broadcasters. Real term spend relates to broadcast TV and does not include any spend on online children's content. Figures do not include any third-party funding.

¹⁵ Source: Ofcom/ITV. In 2017 there was 58 hours of first-run UK-originated programming on CITV out of a total of 5257 hours.

¹⁶ Ofcom, 2018. *Channel 4 Corporation's 2017/18 Statement of Media Content Policy*, page 18. Available at: https://www.ofcom.org.uk/data/assets/pdf_file/0012/114402/Letter-Channel-4-Statement-Media-Content-Policy-201718.pdf

¹⁷ Source: Ofcom/Channel 5.

- 1.16 We have identified three specific areas of concern regarding current levels of programming provision for children:
- a) **There is a lack of original, high-quality programmes specifically made for older children across all programme genres.** Currently no PSB shows programmes specifically made for 13-15 year olds and three in ten children aged 12-15 feel there aren't enough programmes for children their age.¹⁸
 - b) **There is a limited range of children's programmes that help children to understand the world around them.** The BBC must provide news specifically for children and is currently the only provider doing so. There is very little factual programming broadcast by other broadcasters.¹⁹
 - c) **There is a limited range of original, high-quality children's programmes available that allow UK children to see their lives, in all its diversity, reflected on screen.** A third of children aged 8-11 believe there aren't enough programmes that show children who live in the same part of the country as them and 35% feel there aren't enough programmes that show children who look like them.²⁰

Conclusions

- 1.17 We consider there is a need for the PSBs to revitalise their approach to how and what they offer to young audiences.
- 1.18 That means creating more original, UK-made programmes that children value, with a particular focus on addressing the gaps we have identified. Amid heightened competition from online providers, it is in the broadcasters' long-term interests to create programmes that inspire and entertain audiences from an early age, in order to build lifelong relationships with them.
- 1.19 Due to the changing viewing habits of young audiences, we consider that setting quotas for children's programmes on the main commercial PSB television channels would not be an effective approach. To reach today's children and future generations, broadcasters need to exploit the opportunities presented by the internet to ensure young audiences have access to high-quality programmes, but in ways that suit and reflect their viewing habits.
- 1.20 We consider that broadcasters are well placed to explore new and innovative ways of reaching children, to provide content that they both want and need. Each PSB already has a range of portfolio and digital services, which provide a solid foundation upon which they can build.

¹⁸ Ofcom, 2017. *Children and Parents: Media Use and Attitudes Report*, page 97. Available at:

https://www.ofcom.org.uk/_data/assets/pdf_file/0020/108182/children-parents-media-use-attitudes-2017.pdf

¹⁹ In 2017, there was a total of 3 hours of programming classified as children's factual programming on ITV, Channel 4 and Channel 5.

²⁰ Ofcom, 2017. *Children and Parents: Media Use and Attitudes Report*, page 97

- 1.21 Taking account of the above, we have requested that the commercial PSBs each produce a plan setting out how they will increase their provision for children for our assessment, as detailed below.

Action and next steps

- 1.22 **We have written to ITV, Channel 4 Corporation and Channel 5, asking them to develop and share their plans to address our concerns.**²¹ It is in their commercial interests to attract young viewers now to create the audiences of the future. We expect the commercial PSBs' plans to set out how they will improve their provision for children, in terms of creative ambition, investment and genre mix, across their full range of services and platforms, and particularly to set out how they will exploit the internet.
- 1.23 As part of these plans, we want to see how the PSBs will build on their existing relationships with independent producers, distributors and platforms, or explore new creative partnerships with each other. We will continue discussions with the commercial PSBs over the coming months and expect to assess their final plans by the end of March 2019.²² We will then report on the resilience of these plans alongside our next Media Nations report in 2019.²³ We will factor in the effectiveness of these plans as part of the next PSB relicensing process.²⁴ In addition, we will look at the BBC plans to cater for children as part of our responsibilities under the BBC Charter and Agreement.²⁵
- 1.24 **We will build a deeper understanding of how children are using online content.** There are challenges in understanding how children and young people use online platforms, and there is little publicly available data.²⁶ We plan to undertake in-depth, qualitative research into the role of these platforms, including how children make choices between content sources, and how they navigate and make decisions about content once they are using them. This will inform our ongoing discussions with both the platforms and broadcasters. We will also host an event with children's advocates, academics, broadcasters and producers later this year to continue to drive forward the debate on how children of all ages explore their own identity through media and inform themselves about the world around them.

²¹ https://www.ofcom.org.uk/_data/assets/pdf_file/0025/116548/Open-letter-ITV-Channel-4-Channel-5.pdf

²² The Digital Economy Act (DEA) introduced a requirement for C4C to produce an annual Statement of Media Content Policy ('Statement') setting out how it delivered its remit over the course of the previous year and how it plans to do so in the coming year. In preparing the Statement, C4C must have regard to guidance issued by Ofcom and consult Ofcom. We will assess C4C provision for older children in reviewing their Statement in 2019.

²³ Media Nations is Ofcom's annual report on media trends. 2018 report is available here:

https://www.ofcom.org.uk/_data/assets/pdf_file/0014/116006/media-nations-2018-uk.pdf

²⁴ The licences of channels 3, 4 and 5 are due to expire in 2024.

²⁵ BBC, 2017. *Charter and Agreement*. Available at:

https://www.bbc.co.uk/bbctrust/governance/regulatory_framework/charter_agreement.html

²⁶ This document includes a summary of our existing quantitative research on children's use of and attitudes towards online platforms. Available at: https://www.ofcom.org.uk/_data/assets/pdf_file/0015/116520/Annex-Research-Childrens-Content-Consumption.pdf

2. Review background

Review purpose

- 2.1 Ofcom launched a review of children's content on 29 November 2017 to consider the current provision of programmes for children under 16 years old and changing audience habits. The review is framed within our broader PSB duty to consider whether 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.²⁷
- 2.2 The review also set out to assess how we might use the new power provided in the Digital Economy Act 2017 (DEA). The DEA gave Ofcom a power to publish criteria for the provision of children's programming and to set conditions on the licensed public service channels (Channel 3 services, Channel 4 and Channel 5) that we consider appropriate for securing that their provision of children's programmes meets the criteria.²⁸

Our work so far

- 2.3 Over summer 2017, we held a series of stakeholder discussions in Belfast, Glasgow, Cardiff, London and Manchester with a range of broadcasters and producers. These meetings provided the opportunity for us to hear views from a cross-section of the industry and to gather information, for example, on the complexity and challenges in funding productions, and how the nature of commissioning varies across broadcasters.
- 2.4 At the end of November 2017, we published an Invitation to Contribute, in which we set out a series of questions alongside a summary of our current understanding of children's attitudes and consumption of TV programmes, as well as data on current children's provision by the PSB broadcasters.
- 2.5 We received 19 responses to our Invitation to Contribute from a range of broadcasters, producers and other industry stakeholders. Full responses can be found on Ofcom's website.²⁹
- 2.6 The commercial PSBs' responses note the volume of content for children that they currently make available.³⁰ They are concerned that any regulatory intervention in children's programming could threaten their ability to deliver other PSB commitments, arguing that additional obligations would not be affordable unless balanced with

²⁷ Section 264(6)(h) of the Communications Act 2003. The public service broadcasters are those providing Channel 3 services, Channel 4, Channel 5, S4C and the BBC. While all BBC public service television channels are PSB channels, only the main channel of each of the other PSBs have this status.

²⁸ Section 90 of the DEA introducing new section 289A of the Communications Act 2003. Available at:

<http://www.legislation.gov.uk/ukpga/2017/30/part/6/crossheading/provision-of-childrens-programmes/enacted>

²⁹ Ofcom, 2017. *Invitation to Contribute: Children's content review*. Available at: <https://www.ofcom.org.uk/consultations-and-statements/category-2/childrens-content-review>

³⁰ ITV, Channel 4 Corporation, Viacom responses. All stakeholder responses available at:

<https://www.ofcom.org.uk/consultations-and-statements/category-2/childrens-content-review>

adjustments to existing ones, for example news quotas. The BBC, in its response, underlines the important role it plays in providing a wide range of content for children and notes that some commercial providers are increasingly providing content for UK children. The BBC also highlights the need for children's content to be easily found and consumed.³¹

- 2.7 The Commercial Broadcasters Association (COBA)'s response provides evidence to demonstrate that non-PSB commercial channels also invest in UK children's content for their channels, although this investment is often attributed to their non-UK channels.³² Unlike PSB channels, the majority of commercial children's channels are not available free-to-air.
- 2.8 Most other stakeholders express concerns about the level and range of current provision for children. Producers' industry bodies focus on the decline of investment in new UK content and the risks that this poses to the health of the children's production sector.³³ Civil society and academic stakeholders argue that quotas are needed to address this decline across a variety of genres, as they consider it important for UK children to see their lives reflected in TV content.³⁴ Many of these stakeholders also express disappointment that Ofcom does not have access to more detailed data regarding children's media attitudes and behaviour, particularly relating to what children consume online and the reasons why.³⁵

Research and data sources

- 2.9 Ofcom has a range of data and research which provided the basis for the Review. Primary sources were our annual reports on *Children and Parents: Media Use and Attitudes* as well as our monitoring of PSB output and investment.³⁶
- 2.10 The *Media Use and Attitudes* report shows that the types of content children are consuming, and how they are consuming it, are rapidly changing. Research conducted for the 2017 report included: 1,388 in-home interviews with parents and children aged 5-15; 677 interviews with parents of children aged 3-4; and an online study with 500 children aged 12-15.³⁷ We will shortly be publishing more recent data on 12-15s attitudes towards and use of news.

³¹ BBC response. All stakeholder responses are available at: <https://www.ofcom.org.uk/consultations-and-statements/category-2/childrens-content-review>

³² Commercial Broadcasters Association response.

³³ See e.g. page 3 of Pact's response.

³⁴ See e.g. page 9 of Jeanette Steemers response; page 3 of Public Media Alliance's response.

³⁵ See e.g. page 3 of VLV's response; pages 2-3 of the Children's Media Foundation's response.

³⁶ The figures used throughout this report for PSB output and spend refer to networked PSB content, excluding nations/regions content, S4C and BBC Alba programming. The portfolio channels of the PSBs, excluding those of the BBC, are not PSB channels. Figures also do not include spend and hours on any online-only content.

³⁷ Ofcom, 2017. *Children and Parents: Media Use and Attitudes Report*, Section 2. Available at: <https://www.ofcom.org.uk/research-and-data/media-literacy-research/childrens/children-parents-2017>. See Section 3 for more details on methodology.

- 2.11 This update also uses viewing data produced by the Broadcasters' Audience Research Board (BARB). Unless otherwise stated, figures quoted are for viewing of broadcast television, on a TV set, up to seven days after the first broadcast.³⁸
- 2.12 Our analysis of PSB investment shows a decline in investment dedicated to children's programmes but potentially an increasingly important role for third-party funding. Our latest industry data can be found in Ofcom's *Media Nations* 2018 report.³⁹
- 2.13 Responses to the Invitation to Contribute supplemented the data and evidence base outlined above, and together informed our view. This update summarises our main findings, conclusions and next steps.

³⁸ Ofcom, 2018. *Media Nations: UK 2018*, page 24. Available at:

https://www.ofcom.org.uk/data/assets/pdf_file/0014/116006/media-nations-2018-uk.pdf

³⁹ Ofcom, 2018. *Media Nations: UK 2018*.

3. Children's changing viewing habits

Children are a diverse audience of different ages, behaviours and needs

- 3.1 Our Invitation to Contribute highlighted that children are not one audience but several. They range in age from pre-schoolers to teenagers, and have diverse backgrounds, interests, expectations and behaviours. As children grow older, and move between different life and educational phases, their behaviours, needs and wants change with them.
- 3.2 This complexity is reflected in how different content providers, research programmes and measurement tools group young audiences in a number of ways. However, what is true across all ages is the fundamental shifts in their viewing habits. In this section, we focus on how these habits are changing, in particular the movement of young audiences to on-demand and online content.

Children are spending less time watching broadcast TV on a TV set

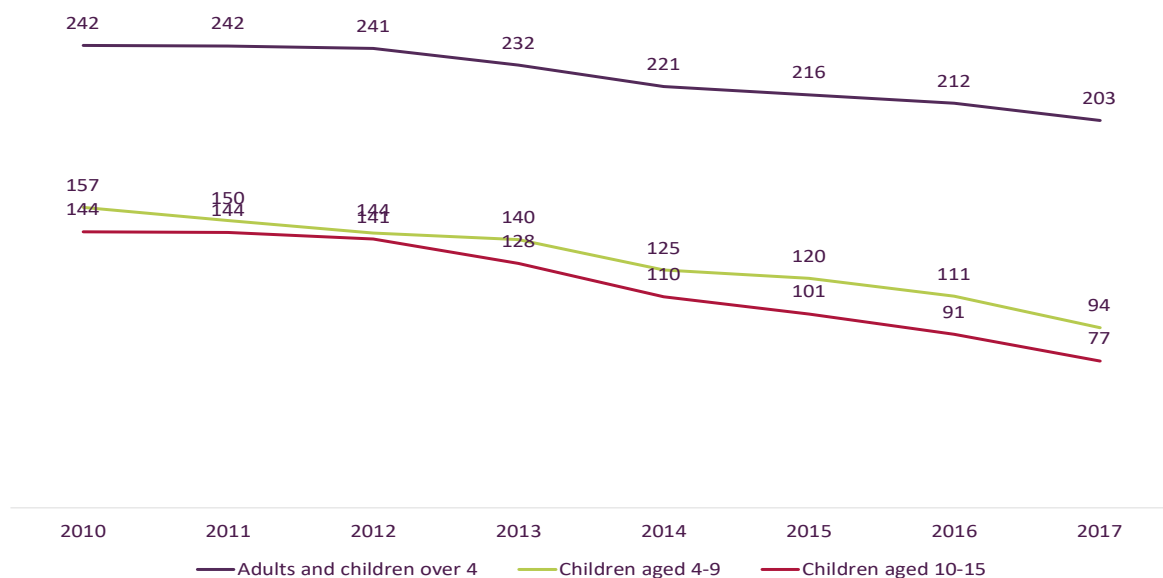
- 3.3 The amount of time children spend watching broadcast TV on a TV set is falling. BARB viewing figures indicate that, in 2017, children aged 4-15 watched ten hours of broadcast television a week, down by over seven hours per week since 2011.⁴⁰ The average weekly reach of broadcast TV for 4-15 year olds in 2017 was 82.5%, down almost ten percentage points from 2011.⁴¹
- 3.4 However, on top of the ten hours of broadcast television watched a week, children also watched an average of 23 minutes of catch-up programming between eight and 28 days after broadcast and also six hours of unmatched viewing a week. Unmatched viewing includes subscription video on demand (SVoD) like Netflix, apps on smart TVs, viewing broadcast programming after 28 days, DVDs and gaming. On average, per week, children's unmatched viewing increased by 24% compared to 2016.
- 3.5 As Figure 1 demonstrates, viewing for older children (10-15s) has fallen in recent years at a faster rate than other age groups. In 2010, 10-15s viewed 144 minutes a day of television, by 2017 this had almost halved to 77 minutes. This compares to an average of 94 minutes a day for 4-9s in 2017.⁴²

⁴⁰ Source: BARB. Network, average daily minutes per person of total TV.

⁴¹ Source: BARB. Network, average weekly reach %. Reach criteria: 15+ consecutive minutes, full weeks used.

⁴² Source: BARB. Network, average daily minutes per person of total TV.

Figure 1: Average total TV daily viewing by age group (in minutes): 2010-2017



Source: BARB. Network, average daily minutes per person of total TV.

3.6 Despite these changes, more than nine in ten children in all age groups say they ever watch TV on a TV set.⁴³ In our qualitative research, children also told us how important it is to spend time both watching and discussing TV programmes with their families and friends.⁴⁴

Children are increasingly watching content on a range of devices, and on-demand and online

3.7 The growth of on-demand and online services has brought many benefits to children, including a greater range of content and more flexibility over when and how they watch it.

3.8 While the TV set remains the most widely-used device for watching TV programmes, children are increasingly accessing content on a range of devices. In 2017, 58% of 5-15 year olds said they have used a device other than a TV set to watch television programmes, up from 45% in 2013.⁴⁵ Our research found that children aged 5-15 estimated they spend more time a week online (15 hours 18 minutes) or using their mobile phone (15 hours six minutes) than they do watching television on a TV set (14 hours).⁴⁶

3.9 The growth in access to smart phones and tablets, and increasing access to faster broadband speeds, is making it easier for young audiences to access on-demand and online

⁴³ Ofcom, 2017. *Children and Parents: Media Use and Attitudes Report*, page 52. Available at: https://www.ofcom.org.uk/data/assets/pdf_file/0020/108182/children-parents-media-use-attitudes-2017.pdf

⁴⁴ Ofcom, 2017. *Children’s Media Lives – Year 4 Findings*, page 22.

⁴⁵ Ofcom, 2017. *Children and Parents: Media Use and Attitudes Report*, page 51.

⁴⁶ Ofcom, 2017. *Children and Parents: Media Use and Attitudes Report*, page 22.

content providers.⁴⁷ Forty-five per cent of households with children have access to at least one SVoD service, with 38% of households with children having access to Netflix and 16% to Amazon Prime.⁴⁸

YouTube and Netflix are becoming increasingly important, especially for older children

- 3.10 YouTube is now used by 71% of 5-7s, rising to 90% of 12-15s. Of 12-15s, 48% say YouTube is the content brand they would miss the most, followed by 19% saying Netflix. Both 8-11s and 12-15s are also more likely to say they prefer watching YouTube to TV programmes on a TV set (40% vs. 18% for 8-11s, 46% vs. 15% for 12-15s).⁴⁹
- 3.11 YouTube and Netflix have become the destination of choice for many older children across a range of content types, such as content that makes you laugh (61% YouTube, 11% Netflix), gives you something to talk about with friends (58% YouTube, 18% Netflix) or inspires you to try something new (52% YouTube).⁵⁰
- 3.12 On-demand and online services provide an unprecedented range of content that enables young audiences to explore and share their interests. Children are still watching TV programmes both broadcast and online, but they are also dedicating time to new types of content. For example, 20% of children aged 5-15 watch 'unboxing' videos on YouTube, where toys are taken out of packaging and played with, and 39% watch videos of people playing computer games.⁵¹ Our research indicates that YouTube is not only a place to consume content, it is also a source of inspiration for children seeking to develop their creative hobbies or to learn more about current interests.⁵²
- 3.13 Children value being able to choose what they watch and online services provide children with a wealth of content from the UK and the rest of the world, available to watch on demand. Stakeholders note that children are independently seeking out content on online platforms and that YouTube may be especially good at providing content that reflects children's personal interests.⁵³

⁴⁷ Ofcom, 2018. *Media Nations UK: 2018* page 13. Available at:

https://www.ofcom.org.uk/data/assets/pdf_file/0014/116006/media-nations-2018-uk.pdf

⁴⁸ Source: Ofcom Technology Tracker H1 2018. Base: all households with children (948)

⁴⁹ Ofcom, 2017. *Children and Parents: Media Use and Attitudes Report*, section 7. Available at:

https://www.ofcom.org.uk/data/assets/pdf_file/0020/108182/children-parents-media-use-attitudes-2017.pdf

⁵⁰ Ofcom, 2017. *Children and Parents: Media Use and Attitudes Report*, page 92.

⁵¹ Ofcom, 2017. *Children and Parents: Media Use and Attitudes Report*, page 85.

⁵² Ofcom, 2017. *Children's Media Lives – Year 4 Findings*. Available at:

https://www.ofcom.org.uk/data/assets/pdf_file/0022/108283/children-media-lives-2017.pdf

⁵³ See e.g. Boom Cymru response page 3, Beano Studios response page 2, Mediawatch-UK response page 1, Girlguiding response page 4. Available at: <https://www.ofcom.org.uk/consultations-and-statements/category-2/childrens-content-review>

But we do not have the full picture of what children are watching online

- 3.14 The evidence we have reviewed points to a fundamental shift in the consumption habits of young audiences – both what they watch and how they watch it. We have provided a summary of key headlines from our research on how children value and use different content platforms, including Netflix and YouTube at Annex 1.⁵⁴
- 3.15 However, fully understanding children's viewing habits across all platforms remains challenging as there is very little publicly available data on these online platforms, in a way that is comparable or equivalent to the data we have on broadcast television use. We outline our research plans on this subject later in the update.

Online viewing could increase risks around children viewing harmful material

- 3.16 Many stakeholders suggest that parents have concerns about the safety and wellbeing of their child online.⁵⁵ Some also note that online providers operate under a much lower level of regulatory control in the UK than broadcast television⁵⁶ and expressed concerns about children consuming increasing amounts of unregulated, and potentially harmful, content online.⁵⁷
- 3.17 Linear TV is regulated in a way that online content is not; broadcasters must comply with the Broadcasting Code⁵⁸ which sets a range of standards including ensuring that content targeted at children, or broadcast before the watershed at 9pm, is appropriate for the youngest audiences. We would also note that providers of UK on-demand services must ensure that children can't access pornographic content and other content likely to seriously impair their development.⁵⁹
- 3.18 Some stakeholders highlight that some children may not make distinctions between different providers. For example, a TV programme on a TV set and a programme on Netflix or YouTube are for them the same type of content.⁶⁰ Children and parents are also not necessarily aware of how different providers and platforms offer different levels of protection, which could increase the risk of children viewing harmful content.
- 3.19 Given their rapid growth and the increasingly important role they play in young people's lives, we believe online providers should do more and be more accountable when it comes to guarding for the quality of content on their services, and helping to reduce the risk of

⁵⁴ Available at: https://www.ofcom.org.uk/_data/assets/pdf_file/0015/116520/Annex-Research-Childrens-Content-Consumption.pdf

⁵⁵ See, e.g., Beano Studios response page 2, CMF, Public Media Alliance response page 3, Mediawatch-UK response page 1. All stakeholder responses are available at: <https://www.ofcom.org.uk/consultations-and-statements/category-2/childrens-content-review>

⁵⁶ See, e.g., COBA response page 6, ITV response page 10, Viacom response page 5.

⁵⁷ See, e.g., Beano Studios response page 11, International Broadcasting Trust response page 11, Public Media Alliance response page 3, VLV response page 7.

⁵⁸ The Ofcom Broadcasting Code, Available at: <https://www.ofcom.org.uk/tv-radio-and-on-demand/broadcast-codes/broadcast-code>

⁵⁹ Ofcom, On Demand Programme Service Rules. Available at: <https://www.ofcom.org.uk/tv-radio-and-on-demand/broadcast-codes/broadcast-code/on-demand-programme-service-rules>

⁶⁰ See, e.g., Beano Studios response, page 4. Available at: https://www.ofcom.org.uk/_data/assets/pdf_file/0010/112213/Beano-Studios.pdf

exposing children to harmful material. This autumn, we will contribute to the ongoing debate about how independent regulation could play a role in helping to protect people, including children, when they are online.

4. The role of PSBs in children’s programming

The PSBs have a crucial role to play

- 4.1 The PSBs, with their broad purposes set by Parliament, have a special role to play for children in the UK. The PSBs’ strategies for children target a mix of different age ranges: Channel 5 shows children’s programming aimed at 2-7s; CBeebies is targeted at under 6s; ITV and CBBC target 6-12s; while Channel 4 Corporation (C4C) makes programming of appeal to older children, defined by C4C as 10-14s, and educational programmes for young adults, defined by C4C as 14-19s.
- 4.2 Collectively, the PSBs are well known and trusted voices in a rapidly changing media landscape and more than eight in ten (83%) parents and carers of children who regularly watch children’s PSB channels rated the provision of PSB children’s programming as important.⁶¹ While children’s viewing of TV on a TV set has declined, the PSBs’ share of that viewing has held up relatively well in recent years.⁶² Two thirds of children in the UK still watch some programming on the PSB channels every week.⁶³

It is important that PSBs deliver a range of quality content for young audiences

- 4.3 Public service broadcasting should ensure that audiences across the UK can freely access a wide range of new, UK content, which delivers important outcomes. The PSBs have a collective responsibility to deliver a suitable quantity and range of high-quality and original programmes for children and young people.⁶⁴ We considered to what extent the current provision delivers the PSB purposes, as set by Parliament, and the PSB characteristics, developed by Ofcom and summarised in Figure 2.⁶⁵

⁶¹ Ofcom, 2018. *Media Nation UK: 2018*, page 5. Available at:

https://www.ofcom.org.uk/_data/assets/pdf_file/0014/116006/media-nations-2018-uk.pdf

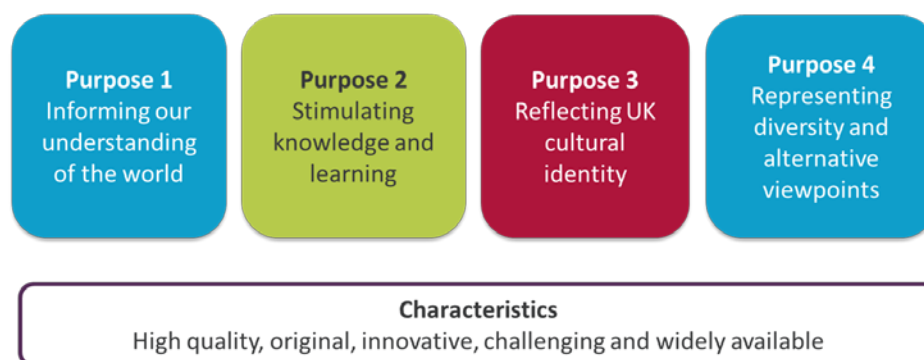
⁶² In 2010 PSBs collective share of 4-15 year olds was 48%, in 2017 this had fallen slightly to 42%. Source: BARB. Network. % share of viewing- all hours.

⁶³ 67%. Source: BARB. Network. Reach criteria: 15+ consecutive minutes, full weeks used.

⁶⁴ Section 264(6)(h) of the Communications Act 2003.

⁶⁵ These were first set out in Ofcom’s first PSB review. Ofcom, 2005. Ofcom Review of Public Service Television Broadcasting: Phase 3 – Competition for Quality, https://www.ofcom.org.uk/_data/assets/pdf_file/0017/15911/psb3.pdf, Section 1

Figure 2: PSB purposes and characteristics



- 4.4 Continued investment by the PSBs in new, UK-made programmes for children matters. It is important that children have access to high-quality, original programmes that reflect and are relevant to their lives. PSB content for children should reflect their life stages, aid them in forming opinions, expose them to diverse voices and introduce them to new interests and perspectives in an age and culturally appropriate way that is engaging and entertaining.
- 4.5 The PSBs primarily deliver programming for children through targeted channels or in scheduled time periods on mixed channels, as follows:
- i) The BBC has two children’s broadcast channels: CBBC aimed at 6 to 12s and CBeebies for 0 to 6s. The BBC also provides children’s programming on BBC Alba, and some on BBC One and Two.
 - ii) ITV simulcasts children’s programmes from CITV (a fully commercial channel aimed at 6 to 12s) between 6.00am to 9.25am on Saturdays and Sundays during winter, and to 8.25am from April to September.
 - iii) Channel 4’s remit requires the broadcaster to provide content of appeal to older children, which it aims to deliver through programmes in peak-time, pre-watershed slots on their main channel. These programmes cover themes that resonate with 10 to 14s but also appeal to a broader audience, such as *Ackley Bridge*.
 - iv) Channel 5 broadcasts children’s programmes under the ‘Milkshake!’ brand, aimed at pre-school audiences, from 6.00am to 9.15am every weekday, with a longer slot, generally 6.00am to 10.35am, on weekends.
- 4.6 The new power in the DEA applies to the commercial PSBs however the BBC, as the main provider of children’s programmes, is important context. We also note that S4C provides a range of children’s programmes in Welsh. S4C typically provides children’s programming on weekdays from 6.00am to 12.00am and 4.00pm to 6.00pm, 6.00am to 10.00am on Saturdays and 6.00am to 9.00am on Sundays, with programmes for children of all ages.
- 4.7 As a publicly-funded broadcaster that occupies a unique position in the UK media landscape, we expect the BBC to lead the way in producing high-quality children’s programmes. In the BBC’s Operating Licence, Ofcom has increased requirements on the BBC for children’s programming to ensure that children receive a minimum provision of

children's programming across different ages and genres.⁶⁶ We will look at the BBC plans to cater for children as part of our responsibilities under the BBC Charter and Agreement.⁶⁷

- 4.8 Providing high-quality children's programmes cannot be left to the BBC alone, however, and the commercial PSBs should provide an alternative source. Parliament sets out a collective responsibility for children's programming across the PSBs, this ensures some choice for viewers and creative competition.

Broadcasters tell us there are challenges in providing children's programming

- 4.9 Commercial broadcasters tell us that there is limited and falling financial return across all children's genres, and that investing in children's programming has become more high-risk over time. They argue that the economics of producing children's content are challenging in the current market, due to the limited commercial returns given the potential audience size and advertising restrictions.⁶⁸ C4C also note that privacy regulations protecting under 13s further limits the possibility of raising revenue from children's programming online. ITV states that it can be difficult to sell children's programmes internationally if the programmes are targeted specifically at a UK audience.⁶⁹
- 4.10 Some stakeholders argue that given the financial incentives of being able to resell content in other countries, UK content will become increasingly international and less representative if left to the market.⁷⁰
- 4.11 Many stakeholders voice support for a Government contestable fund which could provide some financial support for further investment in children's programming.⁷¹ The fund is envisaged as a pilot programme, making available £60m over three years.⁷² We understand that the Government will be setting out further details of the fund in due course.

⁶⁶ Ofcom, 2017. *Operating licence for the BBC's UK Public Services*. Available at: https://www.ofcom.org.uk/data/assets/pdf_file/0017/107072/bbc-operating-licence.pdf. Note: these requirements came into effect from January 2018 or April 2018 for financial year conditions.

⁶⁷ BBC, 2017. *Charter and Agreement*. Available at: https://www.bbc.co.uk/bbctrust/governance/regulatory_framework/charter_agreement.html

⁶⁸ See e.g. Beano Studios response page 10, Channel 4 response page 1, Viacom response page 3, ITV response page 14. All stakeholder responses are available at: <https://www.ofcom.org.uk/consultations-and-statements/category-2/childrens-content-review>

⁶⁹ ITV response page 14.

⁷⁰ See e.g. Pact response page 8.

⁷¹ See e.g. Animation UK response page 4, VLV response, page 3.

⁷² Department for Digital, Culture, Media & Sport, December 2017. *£60 million boost to UK children's television*. <https://www.gov.uk/government/news/60-million-boost-to-uk-childrens-television>. Accessed 17 July 2018.

5. Findings

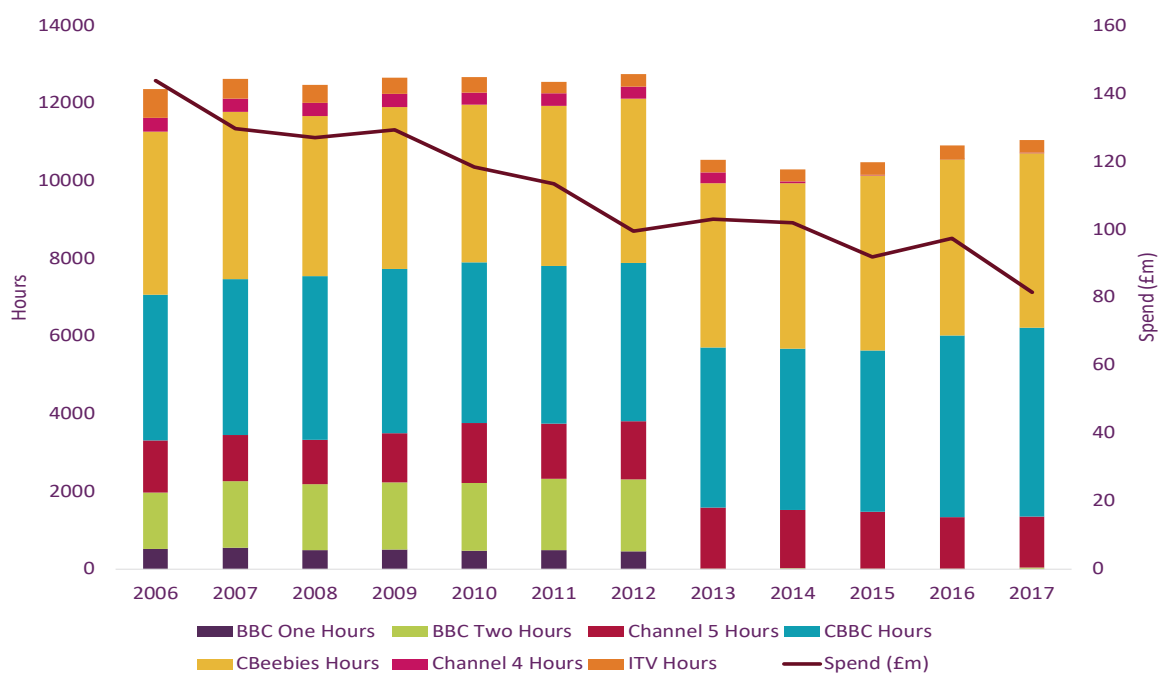
5.1 This section summarises our findings on the provision of children’s programming by the PSBs. We first discuss PSBs’ investment in children’s programming, the contribution of mainstream programming, and programming by age group. We then focus on areas of concern, having reviewed the evidence available, including responses from stakeholders to our Invitation to Contribute.

Investment in children’s programming continues to decline

5.2 The total investment in UK children’s programming on PSB channels has continued the decline seen over recent years. The collective annual spend has fallen from £144m in 2006 to £81m in 2017 in real terms.⁷³

5.3 The total amount of hours of children’s programming varies by PSB channel but overall has remained relatively stable since 2013.

Figure 3: Hours and spend on children’s programming on the PSB channels



Source: Ofcom/broadcasters Note: Output hours are based on slot times. Figures exclude children’s content broadcast on S4C and BBC Alba. Spend figures are in real terms.

⁷³ Source: Ofcom/broadcasters. Spend relates to broadcast TV and does not include any spend on online children’s content. These figures do not take into consideration contributions to the cost of production from third parties, such as overseas broadcasters and independent production companies, under co-production arrangements, which may to an extent account for the decline. Ofcom, 2018. *Media Nation UK: 2018*, page 45. Available at: https://www.ofcom.org.uk/_data/assets/pdf_file/0014/116006/media-nations-2018-uk.pdf

- 5.4 In part, these variations reflect different funding and regulatory models for each broadcaster. However, as summarised in the Invitation to Contribute, there are also a range of commercial and creative drivers that influence each broadcaster's current provision.⁷⁴

Mainstream programming continues to play an important role in children's viewing

- 5.5 In addition to children's programmes, children watch a range of general or mainstream programming provided by the PSBs. Just under two thirds (63%) of all children's viewing of broadcast television on a television set is to programmes not specifically made for children such as family programmes or programmes made for older audiences.⁷⁵
- 5.6 Family viewing is provided across the PSBs through a range of programme genres, from general entertainment through to sport. Programmes such as *The Great British Bake Off*, *Ant & Dec's Saturday Night Takeaway* and *Blue Planet II* prove to be particularly popular with children and families.⁷⁶
- 5.7 The importance of family viewing was also highlighted by a number of respondents to the Invitation to Contribute, who told us that mainstream programmes are valuable to children as they provide an opportunity for families to come together.⁷⁷ This is supported by participants in Ofcom's *Children's Media Lives* who told us that family viewing on the TV set was still valued and is often centered around particular programmes or timeslots.⁷⁸ Respondents also told us that mainstream programmes may play a particularly important role for older children, who tend to be more aspirational in their viewing and may seek out programmes aimed at older audiences.⁷⁹
- 5.8 However, given the different developmental needs and life experiences of children, we consider it is also important that there are relevant, age-appropriate children's programmes available. The following sections consider children's provision across three age categories: pre-school, 6-12 year olds and 13-15 year olds. We focus on provision on the PSB channels but acknowledge that some of this is increasingly made available on the broadcasters' VoD players and online.

⁷⁴ Ofcom, 2017. *Invitation to Contribute: Children's content review*, Section 5. Available at: https://www.ofcom.org.uk/_data/assets/pdf_file/0023/108284/Review-of-childrens-content.pdf

⁷⁵ Source: BARB. Network. 2017. Average daily minutes per person of total TV. Children 4-15.

⁷⁶ Source: BARB consolidated viewing. Children aged 4-15.

⁷⁷ See e.g. Beano Studios response page 2, ITV response page 7, VLV page 6. All stakeholder responses available at: <https://www.ofcom.org.uk/consultations-and-statements/category-2/childrens-content-review>

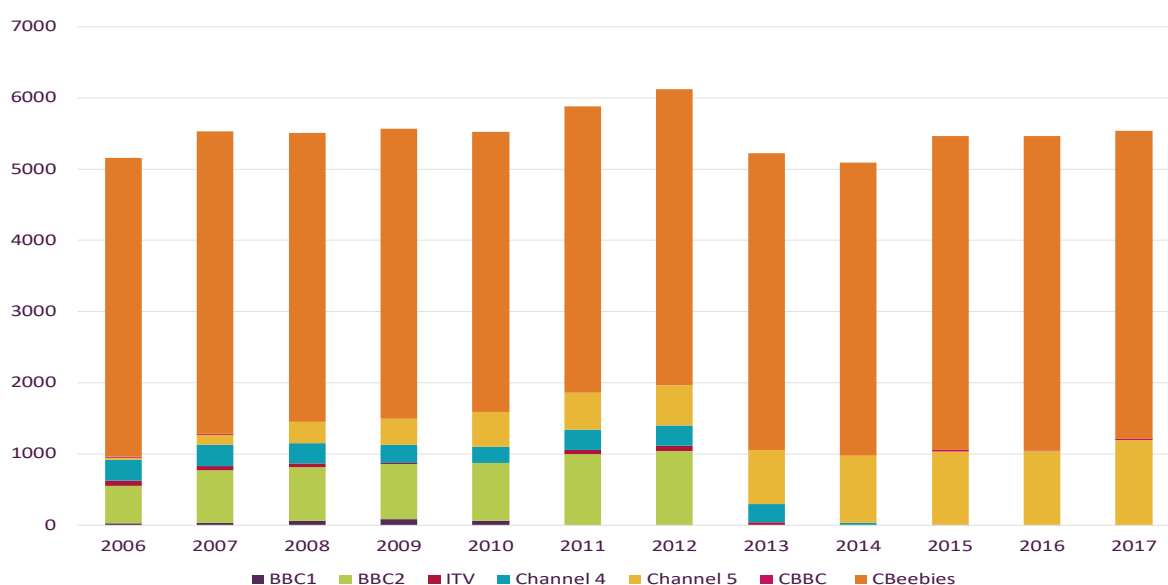
⁷⁸ Ofcom, 2017. *Children's Media Lives – Year 4 Findings*, page 22. Available at: https://www.ofcom.org.uk/_data/assets/pdf_file/0022/108283/children-media-lives-2017.pdf

⁷⁹ See, e.g., Pact response page 5, Beano Studios response page 1, Channel 4 Corporation response page 9.

The amount of content for pre-school children remains relatively stable

5.9 The amount of pre-school programming shown across PSB channels has been relatively steady since 2006. There were 5535 hours of pre-school content in 2017, accounting for over half of all children's programming on PSB channels.⁸⁰

Figure 4: Hours of pre-school programming on PSB channels



Source: Ofcom/broadcasters Note: Output hours are based on slot times. Figures exclude children's content broadcast on S4C and BBC Alba.

5.10 As Figure 4 shows, CBeebies and Channel 5 provide the vast majority of pre-school output. Under the BBC Operating Licence, the CBeebies channel must deliver a range of content which supports pre-school children in their learning.⁸¹ The BBC must also ensure that each calendar year there is at least 100 hours of first-run UK-originated programming on CBeebies and that at least 70% of its programming consists of original productions commissioned by the BBC.⁸²

5.11 Following its purchase of Channel 5 in 2014, Viacom voluntarily committed to broadcasting at least 600 hours of UK-originated children's programmes on Channel 5 until at least the end of its licence period in 2024.⁸³ Channel 5 airs children's programming under its 'Milkshake!' brand aimed at 2 to 7 year olds.⁸⁴ The total provision of children's

⁸⁰ There were 11,043 hours of children's programming in 2017.

⁸¹ Ofcom, 2017. *Operating licence for the BBC's UK Public Service* page 13. Note this condition applies to financial years as of April 2018. The full Licence is available at: https://www.ofcom.org.uk/data/assets/pdf_file/0017/107072/bbc-operating-licence.pdf

⁸² Ofcom, 2017. *Operating licence for the BBC's UK Public Service*, pages 15-16. https://www.ofcom.org.uk/data/assets/pdf_file/0017/107072/bbc-operating-licence.pdf. These requirements came into effect in January 2018.

⁸³ Viacom response, page 1. Available at: <https://www.ofcom.org.uk/consultations-and-statements/category-2/childrens-content-review>

⁸⁴ Channel 5, *Children's Programming*. <http://www.channel5.com/childrens-programming/>. Accessed 16 July 2018.

programming on Channel 5 has remained relatively stable, falling only slightly from 1342 hours in 2006 to 1316 hours in 2017. However, as the 'Milkshake!' brand has developed, a greater proportion of children's programming on Channel 5 now consists of pre-school programmes. The amount of pre-school programming on Channel 5 has risen year on year from 26 hours in 2006 to 1190 hours in 2017.

This programming is popular with pre-school children

- 5.12 Share of pre-school audiences viewing of both CBeebies and Channel 5's 'Milkshake!' timeslot have grown over the past decade. CBeebies' share of 4-6 year olds has grown from 12.4% in 2010 to 16.3% in 2017 while share among parents and carers with children age 0-3 has also grown from 8.1% to 9.3%.⁸⁵
- 5.13 Share of viewing of Channel 5's weekday 'Milkshake!' slot (06:00-09:15) has grown from 17% in 2010 to 25% in 2017 for 4-6 year olds and from 15% to 19% for parents/carers with children age 0-3.⁸⁶

A range of programming is available for pre-school audiences

- 5.14 Pre-school programming is a broad genre that encompasses all programming aimed at children under 6 years old, and so can include both animation and live action.
- 5.15 While a large proportion of pre-school programming consists of repeats (90% of children's programming on Channel 5 in 2017, and 97% on CBeebies), respondents to the Invitation to Contribute state that this is less of a concern for younger children, as younger children enjoy repeats of their favourite programmes⁸⁷, and as the audience refreshes so frequently.⁸⁸
- 5.16 'Milkshake!' programming on Channel 5 includes many short, animated programmes including British voices, with a number of these containing well-known, long-running British animated characters such as Peppa Pig, Fireman Sam, Thomas the Tank Engine, and Noddy. Programming on 'Milkshake!' also includes factual programmes such as *Milkshake Monkey!* and documentary series such as *The Secret Life of Puppies*.⁸⁹
- 5.17 96% of programming on CBeebies was classed as pre-school in 2017. Reflecting the BBC's unique role amongst the PSBs, regulatory measures are designed to support diversity and originality on CBeebies. Programming on CBeebies includes⁹⁰:

⁸⁵ Source: BARB, 2010 and 2017 calendar years, % share of viewing. Child audiences and HWC 0-3 (Housewife = decision maker of household spend. With children 0-3 = presence of children in home aged 0-3 (there could be other ages in home and the housewife is not necessarily the parent).

⁸⁶ Source: BARB, 2010 and 2017 calendar years, % share of viewing. Child audiences and HWC 0-3 (Housewife = decision maker of household spend. With children 0-3 = presence of children in home aged 0-3 (there could be other ages in home and the housewife is not necessarily the parent). Channel 5 excludes +1 but includes HD.

⁸⁷ Children's Media Foundation, page 4. All stakeholder responses available at: <https://www.ofcom.org.uk/consultations-and-statements/category-2/childrens-content-review>

⁸⁸ Pact response, page 8. Available at: <https://www.ofcom.org.uk/consultations-and-statements/category-2/childrens-content-review>

⁸⁹ Source: Ofcom analysis of 'Milkshake!' programming undertaken for weeks commencing 2 April and 30 April 2018.

⁹⁰ Source: Ofcom analysis of programming on CBeebies undertaken for weeks commencing 2 April and 30 April 2018.

- a) live-action drama series such as *Katie Morag* and *Apple Tree House*;
- b) live-action pre-school entertainment, including repeats of popular archive programmes such as *Show Me Show Me*, *Teletubbies*, and *In the Night Garden*, as well as newer programmes such as *Biggleton* and *Justin's House*;
- c) factual programming such as *Do You Know*; and
- d) pre-school animations such as *Rastamouse* and *Go Jetters*.

5.18 Overall, the provision of pre-school programming has held relatively stable in recent years and it is popular with children, parents and carers. The BBC is the largest provider of pre-school programming amongst the PSBs and we will consider its performance as part of our responsibilities under the Charter.

The total provision for children aged 6-12 has increased but viewing has fallen slightly

- 5.19 The BBC and ITV are the main providers of TV programmes for 6-12s. They provide this largely through their dedicated children's channels CBBC and CITV. CBBC is a PSB channel whereas CITV is a fully commercial channel. In this report we focus on provision on the PSB channels.
- 5.20 The total hours of programming on CBBC and ITV aimed at 6-12 year olds has increased from 4,424 hours in 2006 to 5,174 a year in 2017. This increase in hours can be largely explained by CBBC extending its broadcast schedules into the evening (for two further hours until 9pm) in 2016.
- 5.21 Total hours of programming on CBBC increased from 3,747 a year in 2006 to 4,849 in 2017.⁹¹ In 2017, ITV showed 325 hours of children's programming down from 677 hours in 2006, following the launch of CITV in 2006.⁹² This includes programming that is simulcast on CITV on Saturday and Sunday mornings.
- 5.22 As of January 2018, under the BBC's Operating Licence, each calendar year at least 72% of the total hours of programming on CBBC must be original productions commissioned by the BBC, with a minimum of 400 hours of first-run UK-originated programming.⁹³ First-run UK-originated children's programming on ITV has fallen from 158 hours in 2006 to 47 in 2017, with 1% of programming on CITV in 2017 being first-run UK-originated content.⁹⁴
- 5.23 We note children aged 6-12 share of viewing of CBBC has fallen from 7.3% in 2010 to 5.6% in 2017. While ITV's family programme performs well with children, ITV's share of children

⁹¹ These figures exclude pre-school programming.

⁹² These figures exclude pre-school programming.

⁹³ Ofcom, 2017. *Operating licence for the BBC's UK Public Service*. Available at:

https://www.ofcom.org.uk/data/assets/pdf_file/0017/107072/bbc-operating-licence.pdf

⁹⁴ Data provided by ITV. In 2017 there was 58 hours of first-run UK-originated programming on CITV out of a total of 5257 hours.

age 6-12 for its CITV simulcast has fallen from 6.3% to 3.8%. CITV's share of 6-12 year olds has risen slightly during the same timeframe from 2.4% to 2.9%.⁹⁵

There have also been changes in the choice and range of genres available to viewers in this age group

- 5.24 In addition to total hours and investment in programming for 6-12s, we also consider the range of current provision.
- 5.25 The BBC is required to provide mixed-schedule programming for pre-teens. The BBC's Operating Licence helps maintain this mix of genres on the channel by requiring that the BBC must ensure each year that on CBBC in each year, at least 1,000 hours are allocated to drama, 675 hours are allocated to factual programmes, and 85 hours are allocated to news.⁹⁶
- 5.26 On ITV, the total hours of children's animation have fallen from 423 in 2006 to 88 in 2017, while the provision of children's entertainment has increased from 51 hours in 2007 to 234 hours in 2017, with ITV commissioning programmes such as *Bear Grylls' Survival School* and children's game show *Spy School*. In 2017 there was no children's drama shown on ITV.
- 5.27 It is important that 6-12s have access to new, UK-made programmes in a range of genres, given the diversity in wants and needs of this age group and to ensure they are benefiting from PSB as Parliament intends.

There is currently a lack of programming specifically made for older children

- 5.28 Our data suggests that no PSB currently provides programming specifically made for 13-15 year olds. In our research, 30% of 12-15s told us that there are not enough programmes for children their age⁹⁷ and many respondents to the Invitation to Contribute express varying concerns about a lack in provision for older children, with several focusing on programmes for 12-15 year olds.⁹⁸
- 5.29 C4C has a duty to provide content that appeals to older children (which C4C defines as age 10-14), as opposed to being specifically for this age group. C4C's strategy is therefore to commission programmes that are of interest to 10-14 year olds but have mainstream appeal, and broadcast these programmes in peak pre-watershed slots on Channel 4. Titles broadcast in 2017 included *Lego Masters*, *Child Genius* and *Gogglesprogs*, all of which

⁹⁵ Source: BARB. Network. 2010 and 2017. 6-12 year olds. CBBC and CITV % share of viewing for all hours. ITV share for 06:00-09:25 weekends.

⁹⁶ Ofcom, 2017. *Operating licence for the BBC's UK Public Service*. Available at:

https://www.ofcom.org.uk/data/assets/pdf_file/0017/107072/bbc-operating-licence.pdf

⁹⁷ Ofcom, 2017. *Children and Parents: Media Use and Attitudes Report*, page 97. Available at:

https://www.ofcom.org.uk/data/assets/pdf_file/0020/108182/children-parents-media-use-attitudes-2017.pdf

⁹⁸ See e.g. Animation UK response page 3, COBA response page 13, International Broadcasting Trust page 11, Jeanette Steemers page 1, Messenger Davies, M response page 2, Personal Managers' Association page 5, Voice of the Viewer and Listener response page 4. Available at: https://www.ofcom.org.uk/data/assets/pdf_file/0023/116519/childrens-content-review-update.pdf

performed well amongst 10-14 year old viewers. In recent years, C4C has increased its investment in this type of programming. In 2017, it spent £7m and provided 21 hours (18 hours in 2016).⁹⁹

- 5.30 The BBC recently announced it would be making a range of new content for 13-15s to be shown on BBC iPlayer, in a drive to help fill a gap in provision for older children.¹⁰⁰ The BBC's intention is to make these available as 'bingeable' box sets.
- 5.31 We broadly welcome the initiatives from the BBC and C4C to increase investment to engage with older children and will monitor further developments. However, we are concerned by the limited provision currently available specifically for this group.

There is a limited range of children's programmes that help children understand the world around them

- 5.32 Across all age groups, we considered the range of programmes available to children and whether there were any themes or genres with limited provision. The Public Purposes set by Parliament provide a framework for us to do this.
- 5.33 In light of our analysis, we focused on the availability of content that supports young audiences to understand the world around them. News content from broadcasters is crucial in this regard. It can also help counter fake news and disinformation, by providing access to accurate and impartial information which is regulated under the Broadcasting Code. While some children will watch mainstream news and factual programmes, news programmes and factual programmes made specifically for children can explain current affairs in an engaging and age-sensitive way.
- 5.34 Ofcom research shows that traditional broadcasters, TV and radio, play an important role in news provision for children. TV is the most popular source of news among 12-15s who say they are interested in news (64%), and those 12-15s who use TV as one of their top news sources are also more likely to say that it is always or mostly reported truthfully (59%), compared to those who use social media, where 32% say this.¹⁰¹ We will shortly be publishing updated research on children's attitudes to news, which reflects these as continuing trends.
- 5.35 Several stakeholders suggest that there is not enough news and factual programming for children.¹⁰² The BBC has an obligation to show at least 85 hours of news programming on

⁹⁹ Ofcom, 2018. *Channel 4 Corporation's 2017/18 Statement of Media Content Policy*, page 18. Available at: https://www.ofcom.org.uk/data/assets/pdf_file/0012/114402/Letter-Channel-4-Statement-Media-Content-Policy-201718.pdf

¹⁰⁰ BBC Press Releases, 4 July 2018. *BBC announces new content for teens*.

<https://www.bbc.co.uk/mediacentre/latestnews/2018/teen-content>. Accessed 16 July 2018.

¹⁰¹ Ofcom, 2017. *Children and Parents: Media Use and Attitudes Report*, Section 10. Available at:

https://www.ofcom.org.uk/data/assets/pdf_file/0020/108182/children-parents-media-use-attitudes-2017.pdf

¹⁰² VLV response page 10, International Broadcasting Trust response page 10, Jeanette Steemers response page 5, Public Media Alliance response page 4. Available at: <https://www.ofcom.org.uk/consultations-and-statements/category-2/childrens-content-review>

CBBC each financial year. In 2017, 94 hours of news aired on CBBC (aimed at 6-12 year olds) via children’s news programme *Newsround*. None of the other PSBs provide news programming specifically for children.

5.36 Factual children’s programming also plays a role in supporting children’s understanding of the world through informative programming that presents concepts and ideas in ways children can understand. As with children’s news, outside the BBC there is a limited amount of factual programming for children. The BBC has an obligation to provide 675 hours of factual programming for children each year on CBBC.¹⁰³ On PSB channels other than the BBC, in 2006 there were 102 hours of children’s programming categorised as factual; in 2017 there were only three hours, all of which were on ITV.

Figure 5: Hours of children’s news and children’s factual programming on PSB channels



Source: Ofcom/broadcasters Note: Output hours are based on slot times. Figures exclude children’s content broadcast on S4C and BBC Alba.

It is important that UK children see their lives reflected on screen

5.37 When asked about the importance of content that reflects them and their lives, children aged 12-15 are most likely to say it is important that what they watch includes people their age (53%), followed by people doing the same sort of things that they/their friends do

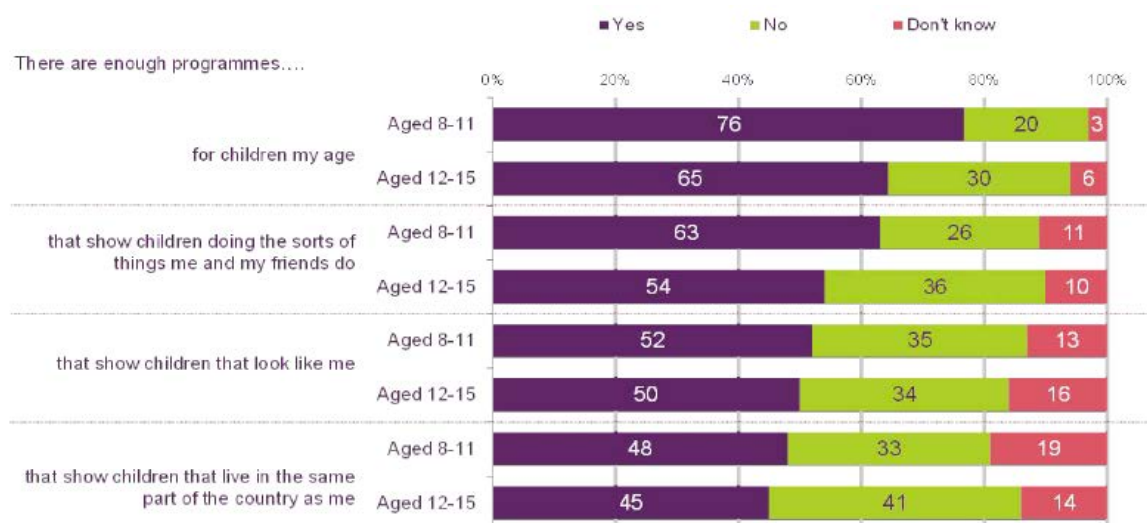
¹⁰³ Ofcom, 2017. *Operating licence for the BBC’s UK Public Services*, page 19. Available at: https://www.ofcom.org.uk/_data/assets/pdf_file/0017/107072/bbc-operating-licence.pdf

(49%), people living in the same part of the country as them (23%) and people who look like them (22%).¹⁰⁴

5.38 The importance of these types of content is supported by many stakeholders responding to the Invitation to Contribute. They assert that children’s content with a UK voice is important, as it helps children learn about their world, form a cultural identity, and develop their understanding of themselves and others.¹⁰⁵

5.39 However, a significant minority of children in the UK do not feel they are adequately represented on television. Forty-one per cent of children aged 12-15 and 33% of those aged 8-11 believed that there weren’t enough programmes that show children that live in the same part of the country as them, while 35% of children aged 8-11 (and 34% of aged 12-15) felt there weren’t enough programmes that showed children that looked like them.¹⁰⁶

Figure 5: Attitudes towards TV programmes among 8-15s



QC4A/B/C/D – I’m going to read out some things about the TV programmes that you watch. Which answer would you choose for each (prompted responses, single coded). Base: Children aged 8-15 who watch TV at home or elsewhere (488 aged 8-11, 467 aged 12-15). Source: Ofcom, Children and parents: media use and attitudes report 2017, page 97.

¹⁰⁴ Ofcom, 2017. *Children and Parents: Media Use and Attitudes Report*, Section 8. Available at: https://www.ofcom.org.uk/data/assets/pdf_file/0020/108182/children-parents-media-use-attitudes-2017.pdf

¹⁰⁵ See, e.g., Boom Cymru response page 2, International Broadcasting Trust response page 10, Máire Messenger Davies response page 2, Pact response page 8, Public Media Alliance response page 3, Sandford St Martins Trust response page 3, VLV response page 5. Available at: <https://www.ofcom.org.uk/consultations-and-statements/category-2/childrens-content-review>

¹⁰⁶ Ofcom, November 2017. *Children and Parents: Media Use and Attitudes Report*, page 97

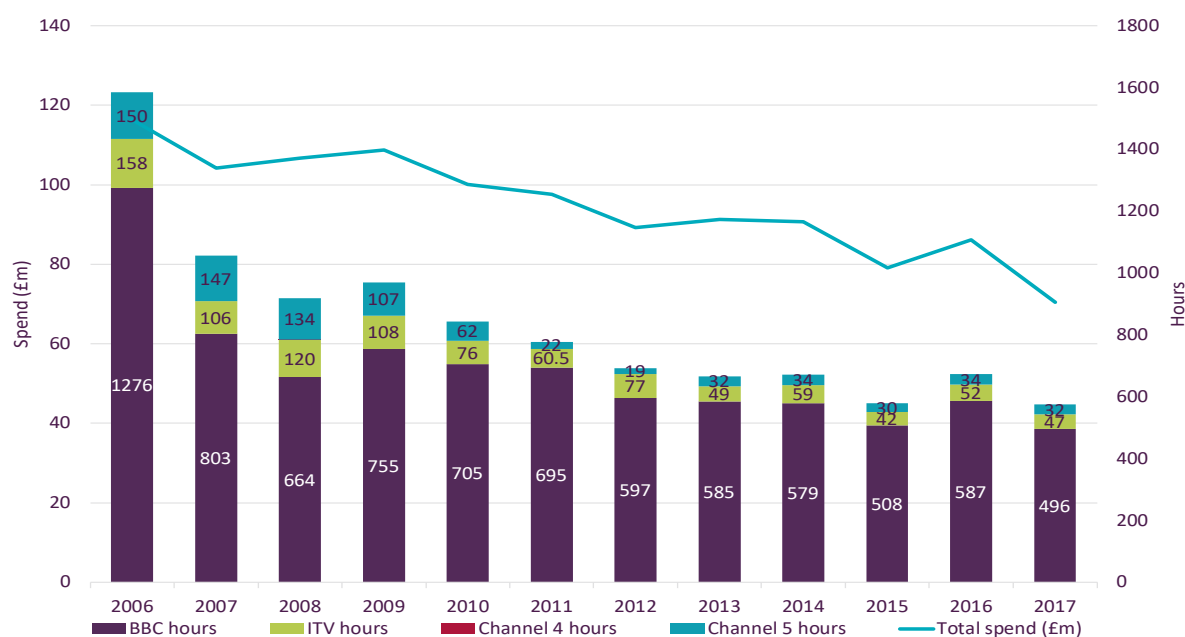
5.40 Feeling inadequately represented could be more acute among certain groups of children. In its response to our Invitation to Contribute, Girlguiding highlight that girls and young women do not feel adequately represented by what they see on screen.¹⁰⁷

UK-made children’s programmes are vital for the representation of UK children on screen, but provision is declining

5.41 UK-made programmes are an important proxy to ensure UK children see people like themselves represented on screen, though being UK-made does not guarantee that programmes will have a UK voice.

5.42 Many respondents to the Invitation to Contribute argued there is not enough investment in new UK programmes for children.¹⁰⁸ Stakeholders also told us that the high proportion of repeats of children’s programming on the PSB services underserves school-age children.¹⁰⁹ Our data shows that PSB investment in first-run UK-originated children’s programming has fallen significantly over the long term. In 2017 the PSB channels combined spent £70.4m on first-run UK children’s programming compared to £116.4m in real terms in 2006.

Figure 6: PSB spend and hours of first-run UK originated children’s programming



Source: Ofcom/broadcasters Note: Output hours are based on slot times. Figures exclude children’s content broadcast on S4C and BBC Alba. Spend figures are in real terms.

¹⁰⁷ Girlguiding response, page 2. All stakeholder responses available at: <https://www.ofcom.org.uk/consultations-and-statements/category-2/childrens-content-review>

¹⁰⁸ See, e.g., C4C’s response page 9, VLV response page 10, Public Media Alliance response page 3, Jeanette Steemers response page 1, Beano Studios response page 6.

¹⁰⁹ See, e.g., Pact response p8; CMF response p4.

- 5.43 This fall in investment is mirrored by a fall in hours of first-run originated children's programming as illustrated in Figure 6.
- 5.44 There is growth in third party investment across all genres (not exclusively children's) which may somewhat offset the decline in investment from the PSBs.¹¹⁰ We also note that there is investment in UK-made original content beyond the PSB channels, and COBA report that its members surveyed spent an average of £15.6m a year on a range of first-run, UK-children's programming, during the last three years.¹¹¹ However, our focus is on what is available to children on the free-to-air PSB channels.
- 5.45 The provision of first-run UK-originated children's programming varies by PSB, reflecting their different funding and regulatory models. Current provision is summarised below:
- a) The BBC is required under the Operating Licence to ensure that that each year there is at least 100 hours of first-run UK originations on CBeebies and 400 hours on CBBC.¹¹²
 - b) ITV has decreased the number of hours of new UK-made children's programmes on its main channel from 158 in 2006 to 47 in 2017. ITV also has a commercial children's channel, CITV, aimed at 6-12 year olds. Only a small proportion of the programmes shown on CITV in 2017 was new UK-made.¹¹³
 - c) Channel 4 does not show any new UK-made programmes made specifically for children. C4C has a duty to provide content that appeals to older children (which C4C defines as aged 10-14) and showed 21 total hours of such content in 2017.¹¹⁴
 - d) Channel 5 has decreased the number of hours of new UK-made programmes primarily aimed at pre-school children from 150 in 2006 to 32 in 2017.

UK children's drama can help children see their lives reflected back to them but there is no provision beyond the BBC

- 5.46 As outlined above, it is important that children see children like them on screen, with voices and accents like theirs, and in locations and doing activities that are familiar. The level of UK-made original programmes is one measure, as is the availability of a range of genres where children might see their lives reflected.

¹¹⁰ Ofcom, 2018. *Media Nations: UK 2018*, page 6. Available at:

https://www.ofcom.org.uk/data/assets/pdf_file/0014/116006/media-nations-2018-uk.pdf

¹¹¹ COBA response, page 3. Available at: <https://www.ofcom.org.uk/consultations-and-statements/category-2/childrens-content-review>

¹¹² Ofcom, 2017. *Operating licence for the BBC's UK Public Service*. Available at:

https://www.ofcom.org.uk/data/assets/pdf_file/0017/107072/bbc-operating-licence.pdf. We will be reporting on their annual conditions and overall performance in autumn next year.

¹¹³ Source: Ofcom/ITV. In 2017 there was 58 hours of first-run UK-originated programming on CITV out of a total of 5257 hours.

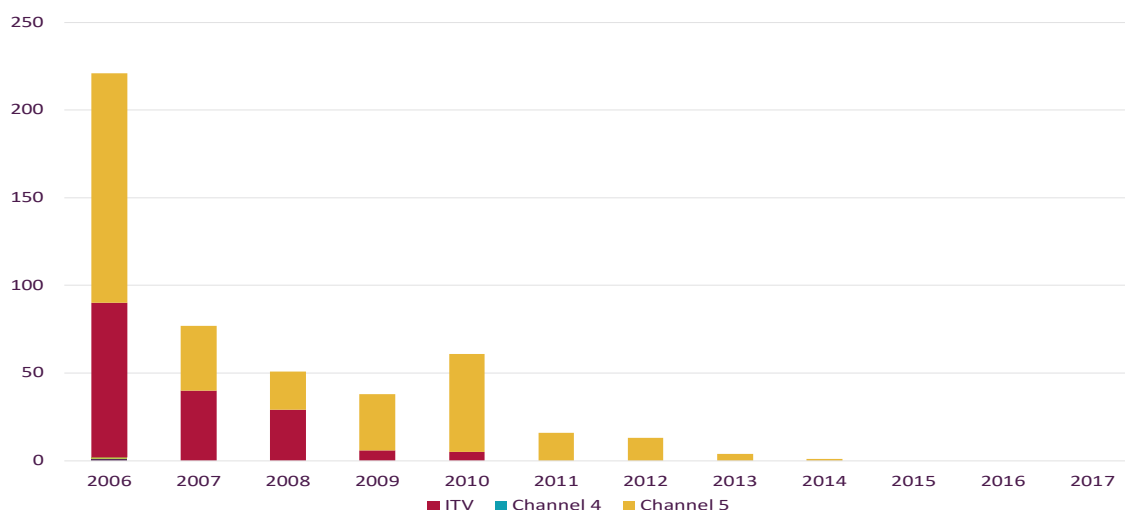
¹¹⁴ Ofcom, 2018. *Channel 4 Corporation's 2017/18 Statement of Media Content Policy*, page 18. Available at:

https://www.ofcom.org.uk/data/assets/pdf_file/0012/114402/Letter-Channel-4-Statement-Media-Content-Policy-201718.pdf

5.47 A range of genres can contribute to this representation of children’s lives on screen, including animation (for example, where UK voices and characters can feature) and live-action children’s entertainment. We focus here on live-action drama as many respondents to the invitation to contribute express concern that investment in UK children’s live-action drama was declining.¹¹⁵

5.48 The BBC Operating Licence requires that the BBC ensures that each year there is at least 1,000 hours of drama on CBBC. However, hours of children’s drama on PSB channels other than the BBC have declined to zero (see Figure 7 below). While there was over 200 hours of children’s drama broadcast on ITV, Channel 4, and Channel 5 combined in 2006, since 2015 there has not been a single hour shown on any of the three channels.

Figure 7: Hours of children’s drama on ITV, Channel 4 and Channel 5



Source: Ofcom/broadcasters Note: Output hours are based on slot times. Figures exclude children’s content broadcast on S4C and BBC.

5.49 UK drama and other real-live action programmes made for mainstream or family audiences can play an important role in allowing children to see themselves represented on screen. However, we believe that given the specific developmental needs and life experiences of children of all ages, that there are still strong arguments for programming made specifically for children.

¹¹⁵ See, e.g., COBA response page 9, Maire Messenger Davies, response page 9, Personal Managers’ Association response page 5, VLV response page 10, Boom Cymru response page 5. Available at: <https://www.ofcom.org.uk/consultations-and-statements/category-2/childrens-content-review>

6. Conclusions and next steps

We have identified three areas of concern in the current provision of children's programmes across the PSBs

- 6.1 It is important that there is relevant, age-appropriate content made specifically for children. Having reviewed a wide range of evidence, we consider there is a need for the PSBs to revitalise their approach to how and what they offer to young audiences. That means creating more original, UK-made programmes that children value, in particular in the following areas:
- a) The lack of original, high-quality children's programmes specifically made for older children across all programme genres;
 - b) The limited range of children's programmes that help children of all ages understand the world around them; and,
 - c) The limited range of original, high-quality children's programmes available that allow UK children of all ages to see their lives, in all its diversity, reflected on screen.
- 6.2 We set out in the following sections how we think the PSBs might respond to these concerns and what our next steps are.

It is important that PSBs continue to evolve to reflect young audiences' changing viewing habits

- 6.3 Amid heightened competition from online providers, it is in the broadcasters' long-term interests to create programmes that inspire and entertain audiences from an early age, in order to build lifelong relationships with them. This will help ensure that the benefits PSB bring, in terms of providing high-quality, original UK content for all, is continued for future generations.
- 6.4 Ofcom has an important role to play in helping the PSBs to adapt to the significant changes in the market and in audience behaviour. Due to the changing viewing habits of young audiences, we consider that setting quotas for children's programmes on the main commercial PSB television channels would be of decreasing relevance.
- 6.5 To reach today's children and future generations, broadcasters need to exploit the opportunities presented by the internet to ensure young audiences have access to high-quality programmes, but in ways that suit and reflect their viewing habits.
- 6.6 We consider that broadcasters are well placed to explore new and innovative ways of reaching children, to provide content that they both want and need. We want to support and encourage them to do this. Each PSB already has a range of portfolio and digital services, and this provides a good foundation on which they can build.

Action and next steps

- 6.7 **We have written to ITV, Channel 4 Corporation and Channel 5, asking them to develop plans to address our concerns as a priority.** We expect the commercial PSBs' plans to set out how they will improve their provision for children in terms of creative ambition, investment and genre mix, across their full range of services and platforms, and particularly to set out how they will exploit the internet.
- 6.8 As part of these plans, we want to see how the PSBs will build on their existing relationships with independent producers, distributors and platforms, or explore new creative partnerships with each other. We will continue discussions with the commercial PSBs over the coming months and expect to assess their final plans by the end of March 2019.¹¹⁶ We will report on the resilience of these plans alongside the next Media Nations report, to be published in summer 2019. We will factor in the effectiveness of these plans as part of the next PSB relicensing process.¹¹⁷ In addition, we will look at the BBC plans to cater for children as part of our responsibilities under the BBC Charter and Agreement.¹¹⁸
- 6.9 **We will build a deeper understanding of how children are using online content.** There are challenges in understanding children and young people's usage of online platforms and there is little publicly available data.¹¹⁹
- 6.10 We plan to undertake in-depth qualitative research into the role of these platforms, including how children make choices between content sources, and how they navigate and make decisions about content once there. This will inform our ongoing discussions with both the platforms and broadcasters. We will also host an event with children's advocates, academics, broadcasters and producers later this year to continue to drive forward the debate on how children of all ages explore their own identity through media and inform themselves about the world around them.

¹¹⁶ The Digital Economy Act (DEA) introduced a requirement for C4C to produce an annual Statement of Media Content Policy ('Statement') setting out how it delivered its remit over the course of the previous year and how it plans to do so in the coming year. In preparing the Statement, C4C must have regard to guidance issued by Ofcom and consult Ofcom. We will assess C4C provision for older children in reviewing their Statement in 2019.

¹¹⁷ The licences of channels 3, 4 and 5 are due to expire in 2024.

¹¹⁸ BBC, 2017. *Charter and Agreement*. Available at:

https://www.bbc.co.uk/bbctrust/governance/regulatory_framework/charter_agreement.html

¹¹⁹ This document includes a summary of our existing quantitative research on children's use of and attitudes towards online platforms. Available at: https://www.ofcom.org.uk/data/assets/pdf_file/0015/116520/Annex-Research-Childrens-Content-Consumption.pdf