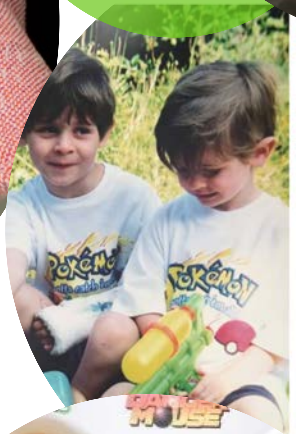
Is Kids' TV at a Turning Point?

About me...



About Sony...

Sony Pictures UK Kids' Networks

TARGETING:
4-6
GENDER NEUTRAL

TARGETING:
6-10
GENDER NEUTRAL

TARGETING:
7-11
BOYS

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Where We Are

+70% share of Freeview kids market
Reaching 3m kids every month

POP channels available in every home

Freeview · sky · PlayStation · Freesat · Virgin media · BT TV · TalkTalk

…and on demand via PS4, websites, mobile/tablet apps and TVs

POP kids are 33% more likely to discover content via TV ads vs average child in the UK*

Source: BARB/TechEdge, Share of Freeview market = commercial impacts Kids 4-15, Jan-Dec 17

*Source: Kids' UK Media Tracker, Dubit (2017)

*BARB / Monthly Reach / 2017 / 4+ / All Platforms

Sony Kids

POP #1 COMMERCIAL UK KIDS' CHANNEL

Reaching almost 3 million kids per month*

>70% share of Commercial Kids' Freeview market (commercial impacts)

#1 FTA Commercial Kids' group

BUILD DIGITAL PRESENCE

Launched mobile app – Pop Fun, PS4 Pop app, YouTube Channels and YouView and Freeview Players

Background

Kids are Literally Spoilt for choice.

The greatest change in Generation Z and now Generation Alpha's viewing is the fantastic array of choices with a proliferation of platforms, services and channels competing for their attention.

The age when children get their own smartphone is ageing down, often meaning tablets being passed down to younger children. This is having an impact on behaviours on mobile connected devices

As well as playing app games and watching video, they use tablet and smartphone to record 'moments', e.g. take photos or screenshots. As they get older they use social and messaging services to share with friends

Using the television is less of a daily habit amongst pre-school children. This has impacted on the amount of time 4-6 year olds spend watching linear content on a television

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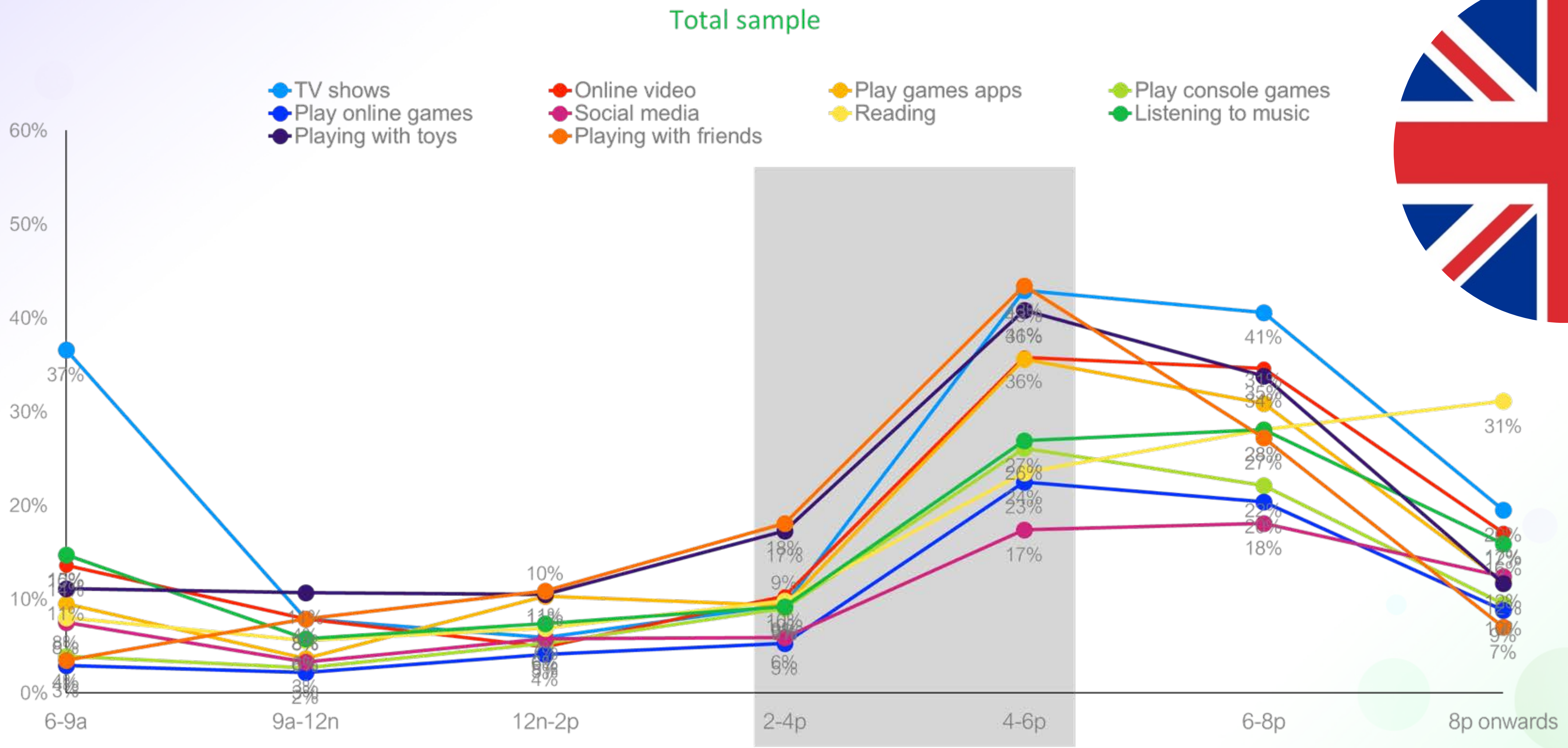
Kids need help structuring their media day



Source: Dubit Trends. AQ5.3. Now we'd like you to tell us the times of day that you normally do [text-sub: your child normally does] these activities. (Base: US Wave 6 2024)

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Kids have more control over what they're watching.

Where previously, TV was the primary access point for video content and was policed by the parent, kids now have their own personal means of access through smartphones and tablets which have become the nucleus of younger children's media ecosystems

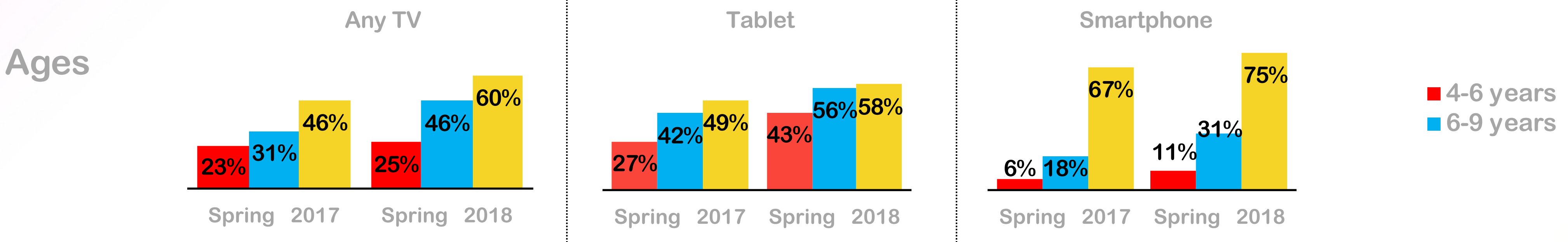
The growth of services like YouTube has reduced the degree to which parents control their kids' content consumption. Parents are bemused by the crazes created by YouTube, from watching videos of your favourite gamers playing Fortnite to kids making slime; all of this seems far removed from the more 'traditional' TV programming they grew up with

One key change to note is the cross-market decline in linear TV viewing among kids. While linear TV remains a core activity for kids, and reach remains high, time spent is in long-term decline. Part of the explanation for this is a substantial rise in consumption of YouTube, a platform which generates almost religious devotion amongst kids

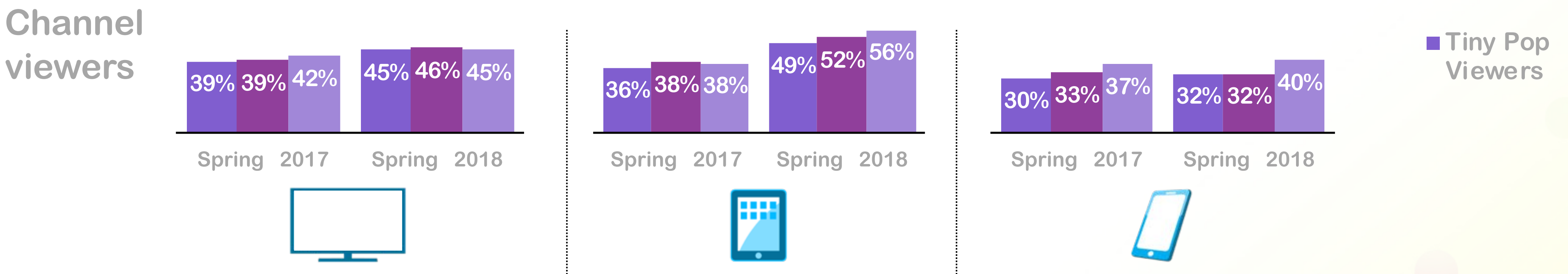
Kids have their own individual entertainment microsystems. Kid-centric services like YouTube allow kids to focus solely on their favourite interests, ensuring that the content they see is increasingly personal and specific to them

Device Ownership

Both tablet and smartphone ‘ownership’ is ageing down. Significantly more 4-6 year olds have their ‘own’ tablet. Growth in smartphone is outpacing growth in ‘ownership’ of tablets amongst 6-9 year olds.



Amongst channel viewers, ‘ownership’ of screens is considerably higher than a year ago (with the exception of smartphones amongst POP viewers), with most growth seen for tablets



Source: Dubit Trends. AQ1. As a child, which of these devices do you have access to/have one of your own? (Base: UK Wave 8 4-6 years old 255 6-9 years old 330 10-15 years old 447 4-15 years old 949 Tiny Pop Viewers 185 POP Viewers 167 POP MAX Viewers 83) R2335 - Sony Multi-market Trends (UK) Wave 8

Kids are increasingly wedded to entertainment properties rather than TV channel brands

Kids are fuelling their fandom of individual entertainment properties via multiple touchpoints and platforms. In this environment, channel brands struggle to cut through. The days when entertainment properties could exist and thrive exclusively on linear TV are gone.

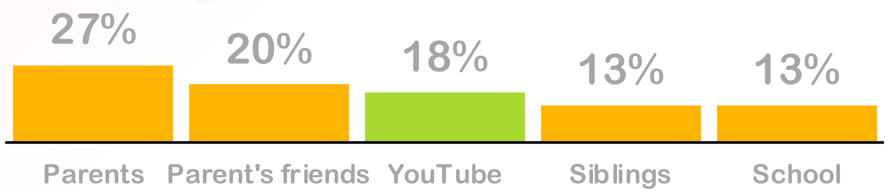
FORTNITE BATTLE ROYALE

Except some platforms that are brands in their own right!

YouTube has evolved into a 'place' of discovery

%

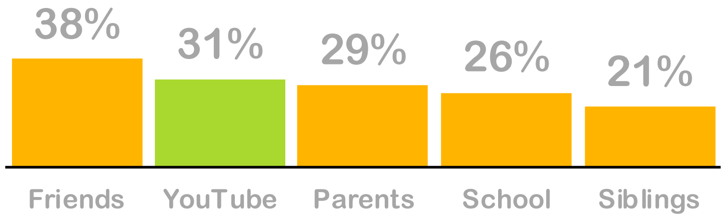
2-4 year olds



Searching for content is rare, so parents key

%

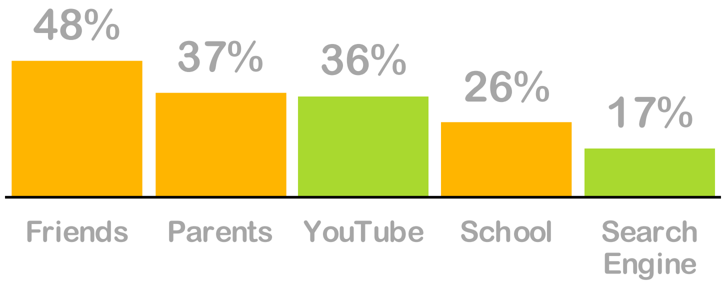
5-7 year olds



Searching for content through trusted sources

%

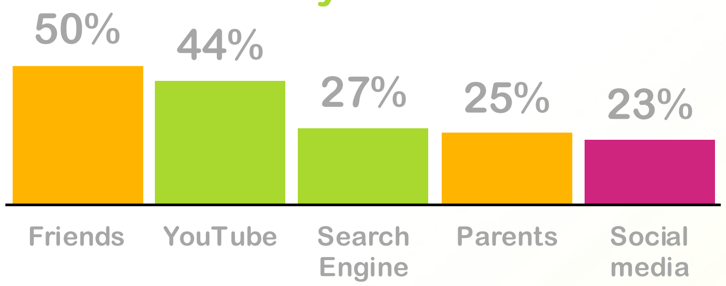
8-10 year olds



YouTube is number one and search engines enter the mix

%

11-15 year olds



Finding new content becomes social currency

Source: Dubit Trends. CQ3.3 Which of the following have you used to find out more about something new to watch, read or play? (Base: UK Wave 9 -4 (253) 5-7 (256) 8-10 (251) 11-15 (384))

Owning YouTube and Social Media

Kids just want great content and don't understand why they can't watch everything they want to, everywhere, at any time!

Strategy

A real understanding of where your brand needs to be should be present from the very beginning. Make sure you have the rights you need and the funding necessary to create the suite of assets that's right for you.

360

Do you need a game, would character profiles, singalongs or shorts and value to your brand and help build its profile? It's more efficient and cheaper if you plan and schedule these alongside your main production schedule from the outset.

Strategy

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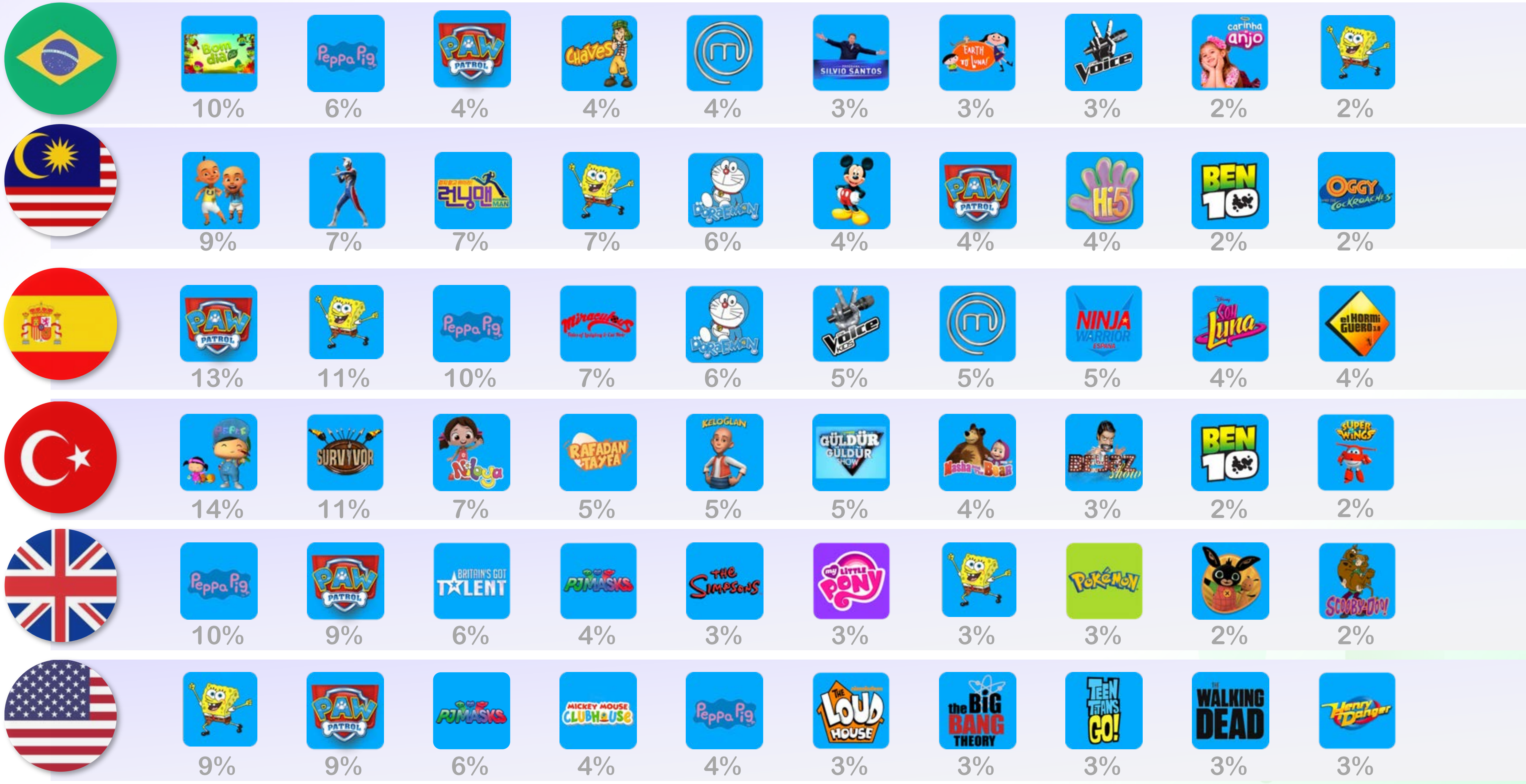
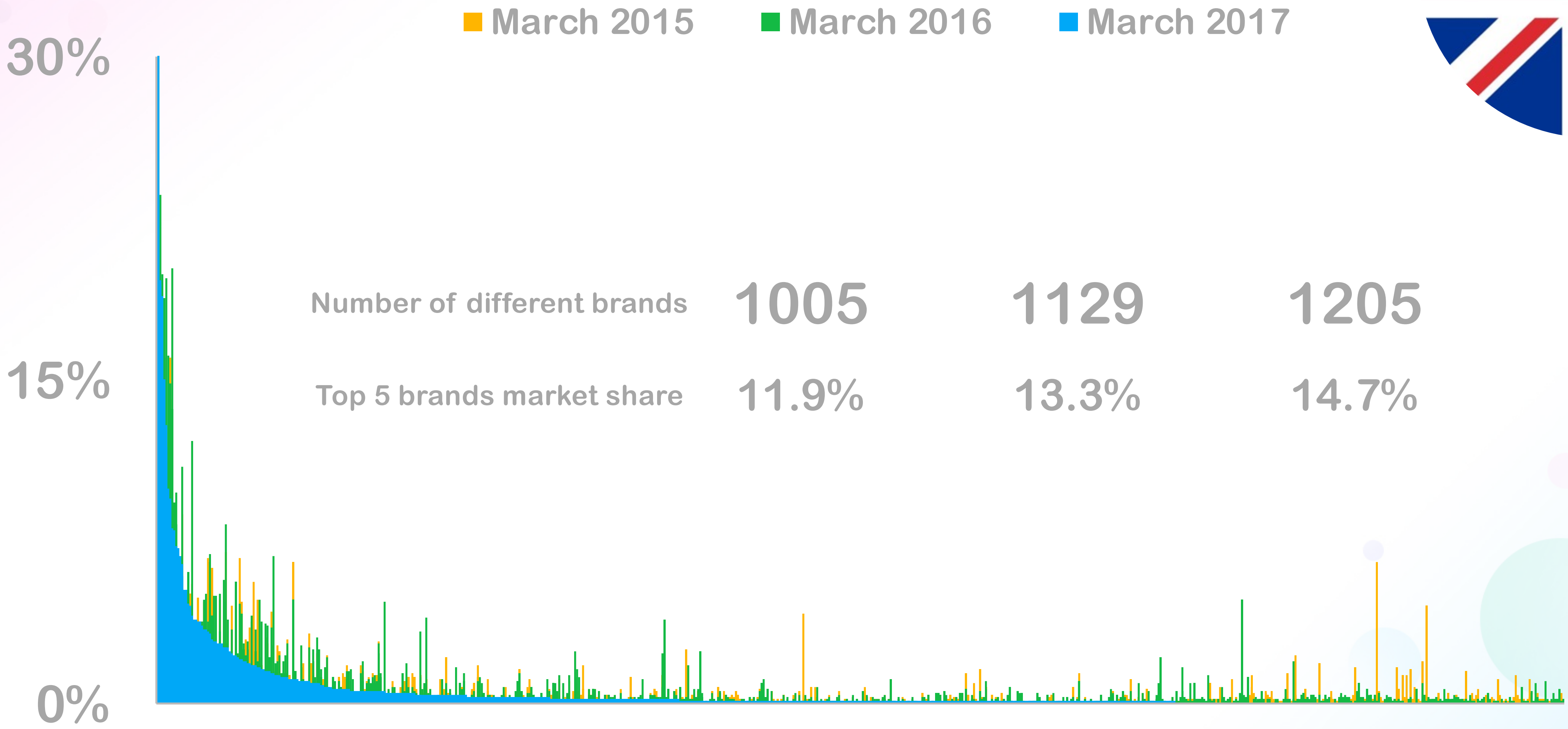
It’s harder than ever to launch a new show



Long tail, fat head



	March 2015	March 2016	March 2017
Number of different brands	1005	1129	1205
Top 5 brands market share	11.9%	13.3%	14.7%

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Building a Brand

It might not be how you think…

Three of the biggest brands in the world – Peppa Pig, PJ Masks and Paw Patrol were new properties – how did their creators build them into the global successes they are today?

Pay real attention to detail across all of the Creative and Editorial components – equal attention must be paid to all elements of production, starting with proper development, strong scripting, rigorous design and great animation.

And don't forget the Voices and Sound Design!

There's safety in numbers – finding like-minded partners (co-production, financial, platform or toy) helps spread the risk and provide useful alternative production view-points. However, making sure that one creative has the last word is the difference between success and failure!

Give the audience a chance to "discover" your show. Marketing is key in a world of too much choice – making a great show is only the start of building a successful brand. Plan and strategise (and budget) from the outset – be prepared to change and adapt your plans as you go

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Other Production Tips