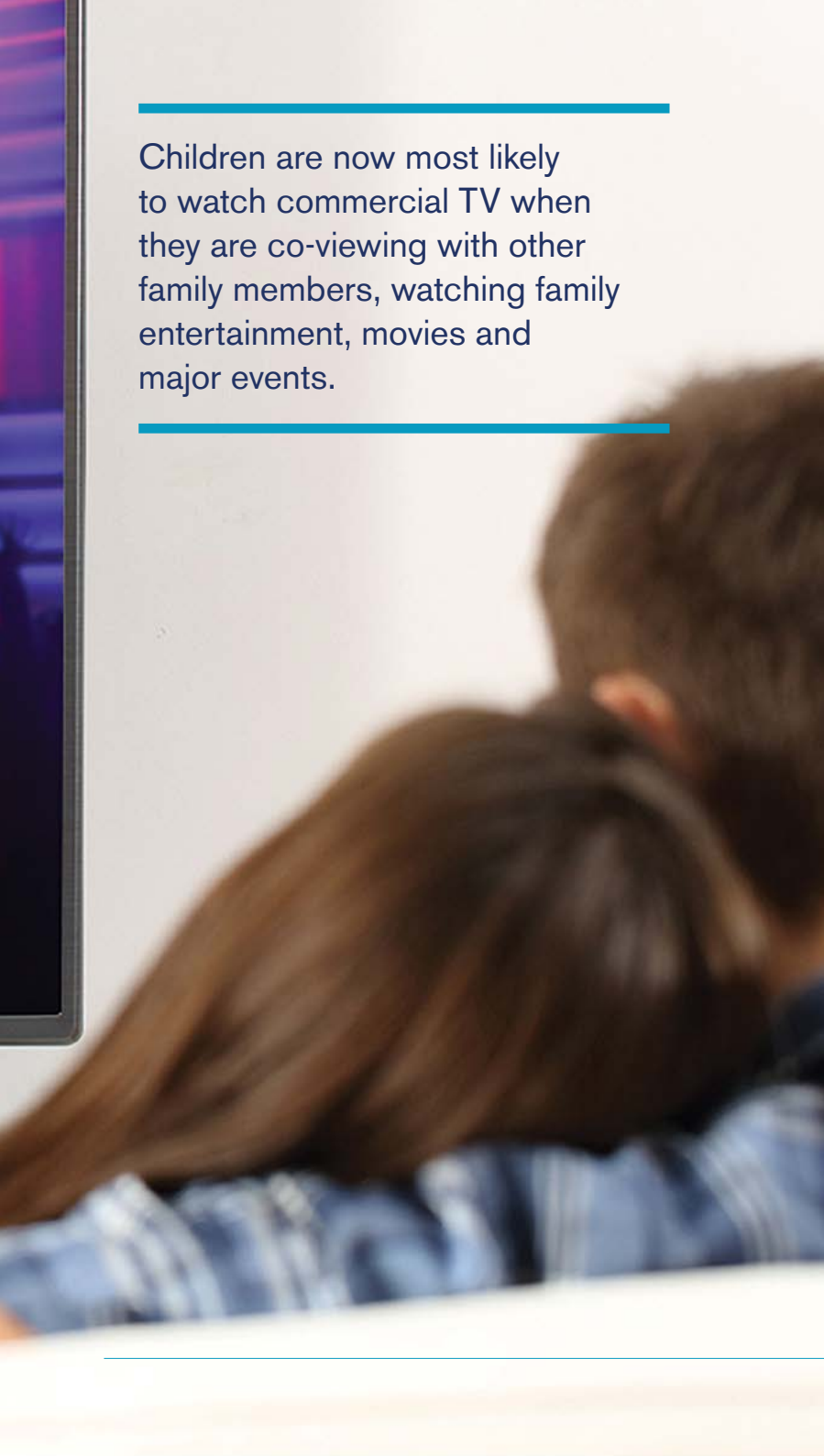




Changing views:  
**Australian kids and  
commercial television**







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Children are now most likely to watch commercial TV when they are co-viewing with other family members, watching family entertainment, movies and major events.

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# Introduction

There's a dizzying array of data available about the habits of Australian television watchers. To help inform policy and business decision makers – and the public – this report focuses on how children are watching free-to-air commercial TV.

The key finding is that far fewer kids aged 0 to 13 are watching child-specific programs (classified as C or P)<sup>1</sup> on free-to-air commercial TV than they once did. This is despite the fact commercial broadcasters are meeting their regulatory obligations and delivering hundreds of hours of children's content each year, most of which is locally produced.

These shows regularly win awards and are easy to access, but unfortunately kids simply aren't watching them. The reason is that they (or their parents) prefer to access children's TV through aggregated platforms such as ABC Kids and Nickelodeon on pay TV. Or they find TV-style content where and when they want it from streaming and internet services like Netflix and YouTube, or the many options available on the Internet at large.

Even where a free-to-air broadcaster has created a channel focused on children's programming – as Nine has done with 9GO! Kids since late 2016 – audiences have been relatively small.

Children still watch plenty of free-to-air commercial TV, but they engage with it differently. Children are now most likely to watch commercial TV when they are co-viewing with other family members, watching programs such as family entertainment shows, movies and major events.

These programs regularly attract hundreds of thousands of children because they engage a wide family audience through entertaining narratives and rich storytelling that is crafted to appeal to all ages.



<sup>1</sup>C denotes children's programming for those aged 5–13 years. P denotes programming for preschool children, aged 0–4 years. However, the ACMA used the 0–14 demographic in its recent study into children's viewing. This causes some variation in the data quoted throughout this report.

## A different era for C and P content

### Remember Skippy?

Back in the 1960s and 1970s when many of the rules governing Australian television content were established, children had little choice about what shows they could see and when. This ensured there were large audiences for what are now classified as C (for children aged 5–13 years) and P (for preschool children aged under five years) programs on commercial TV.



**Round the Twist**  
1992–1993 –Seven  
**280,000**  
Average Audience



**Hi-5**  
2001 – Nine Network  
**330,000**  
Average Audience

### Networks are delivering C & P content but children are not watching

Today, commercial free-to-air broadcasters collectively deliver more than 1,170 hours of C and P programming for children every year. However, the number of kids watching these shows has dropped dramatically compared to earlier decades.

Here is a snapshot of the audiences for some locally produced and critically acclaimed children's shows screened on commercial free-to-air TV in 2017.



**Imagination Train**  
Channel 9GO!  
**8,000**  
Average Audience (0–14)



**Scope**  
Channel ELEVEN  
**4,000**  
Average Audience (0–14)



**Beat Bugs**  
Channel 7two  
**1,000**  
Average Audience (0–14)

### Big child audiences for family entertainment

When children watch commercial free-to-air TV, it's now mainly for family-friendly entertainment programs and major events.



**Masterchef Australia**  
Channel Ten  
**219,000**  
Average Audience (aged 0–14)



**Australian Ninja Warrior**  
Nine  
**287,000**  
Average Audience (aged 0–14)



**Little Big Shots**  
Seven  
**182,000**  
Average Audience (aged 0–14)

# The new reality in detail

## Average audiences for C and P sharply down

Free TV asked the television audience measurement group OzTAM to analyse audiences for programs classified as C and P broadcast on any commercial free-to-air TV channel in the calendar years of 2010, 2013 and 2016.

The analysis reveals that on average very few children are watching programming classified as C and P released on commercial free-to-air TV.

- In 2010, 14% of C and P programs attracted an average of more than 25,000 children aged 0–13 years.
- By 2016, only 7% of C and P programs had an average audience of 0–13 year olds that was higher than 25,000 and 79% of programs had an audience of below 10,000.
- Further, in 2016, all pre-school programs had an average audience in the 0–13 year old bracket of less than 10,000.

Numerous C and P shows screen to fewer than 1,000 children on commercial free-to-air television.

On average, C and P programming is reaching 0.2% of the potential target audience of all Australian children with access to the services. It is clearly no longer serving that audience.



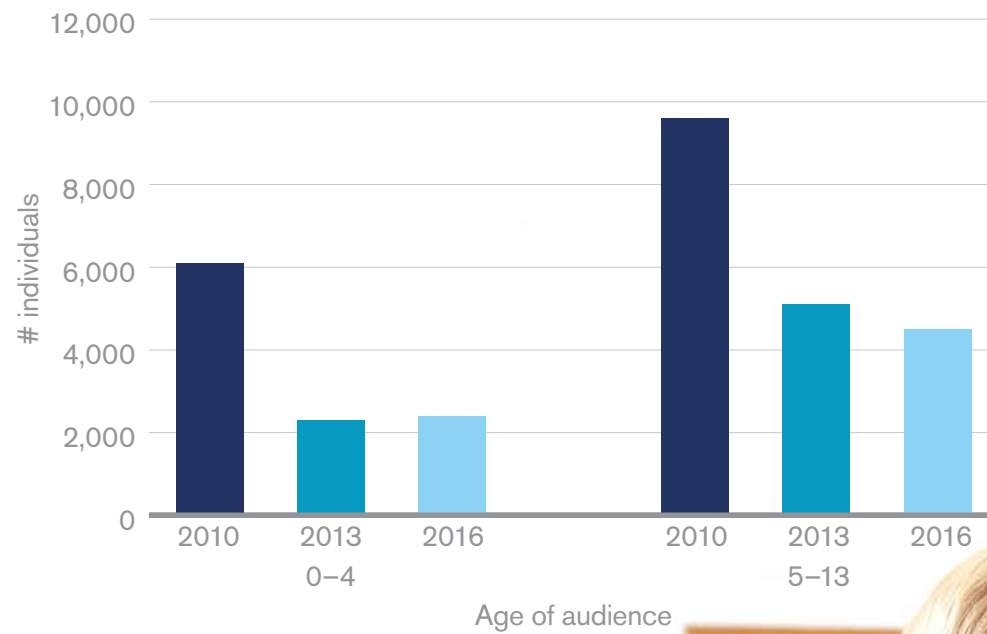
C and P programming is reaching only

0.2%

of the potential target audience of all Australian children



### C and P audiences numbers are low and declining



Source: OzTAM analysis for Free TV, completed mid-2017. See Appendix for further detail.



## Audience numbers for specific C and P shows

The following table shows the average audiences for a range of C and P programs shown on commercial free-to-air TV in 2016. A number of these shows have won awards in recognition of their high quality. They are also readily accessible at suitable times on broadcasters' multi-channel services. Even so, they are gaining very small audiences. In 2016 the average C/P program on commercial TV attracted an average audience of only 2,400 0–4 year olds and 6,800 5–13 year olds.

This trend is being seen even for 9GO! Kids which was launched as a dedicated destination for children in December 2016 and has been promoted heavily. While this effort is seeing 9GO! secure C and P audiences higher than the other commercial channels, the total audience numbers are still extremely low by free-to-air standards, and lower than those for the ABC children's channels. It's also notable that the two highest rating programs, Maya the Bee and Dogstar: Christmas in Space, were movies.

## Award-winning programs

TV shows made in Australia for kids by commercial free-to-air broadcasters consistently win industry awards.



**Beat Bugs** (Seven) won best children's services at the 2016 AACTA awards and has been nominated for a Logie award and a number of daytime Emmy Awards in the US.



**Dogstar: Christmas in Space** (Nine) won the award for best 2D animation at the prestigious 2017 Asia Pacific Apollo Awards. The show was the sequel to the first two successful Dogstar series, comprising 52 half-hour children's animations.



**Get Ace** (Ten) won first prize for best animation at the 2014 Australian Writers' Guild Awards, been sold internationally and also won awards for its musical content.



**Mako: Islands of Secrets** (Ten) won Best Children's Television Program at the 2015 Australian Teachers of Media (ATOM) awards, and was a finalist in the 2016 ATOM awards and 2016 Screen Producers Australia Awards.

Name	Average Audience (0–13 years)	Timeslot	Program Type
<b>Pre-school Programs</b>			
Crocamole	2,000	● 0930	▲
Imagination Train	7,000	● 0900	▲
Jay's Jungle	1,000	● 0800	▲
Lah-Lah's Adventures	1,000	● 0800	▲
Larry The Lawnmower	2,500	● 0800	▲
William & Sparkles' Magical Tales	7,000	● 0900	▲
Wurrawhy	4,000	● 0930	▲
<b>Children's Drama – First release and Repeat</b>			
Barefoot Bandits	4,000	● 0700/0730 ● 1000 ● 0800	▲
Beat Bugs	1,000	● 0730	▲
Bottersnikes & Gumbles	1,000	● 0730	▲
Buzz Bumble	21,000	● 0730	▲
Captain Flinn and the Pirate Dinosaurs	29,000	● 0730	▲
Dennis and Gnasher	30,000	● 1100	▲
Dogstar: Christmas in Space	35,000	● 1800	▲
Get Ace	5,000	● 0700	▲
Hairy Legs	1,000	● 0730	▲
Heidi	14,500	● 1100	▲
Kuu Kuu Harajuku	4,500	● 0730	▲
Lexi & Lotti: Dynamic Detectives	2,500	● 0700	▲
Maya the Bee	46,000	● 1800	▲
Mako: Island of Secrets	3,500	● 1000	▲
Pirate Express	22,000	● 1130	▲
Sally Bollywood: Super Detective	1,000	● 0730	▲

Name	Average Audience (0–13 years)	Timeslot	Program Type
Sam Fox: Extreme Adventures	5,000	● 1000 ● 0800	▲
Tashi	2,000	● 0730	▲
The Day My Butt Went Psycho	22,000	● 0730	▲
The Skinner Boys	23,000	● 0730	▲
The Wild Adventures of Blinky Bill	1,000	● 0730	▲
The Woodlies	1,000	● 0730	▲
Vic The Viking	5,000	● 0730	▲
<b>Other C programmes</b>			
Baby Animals In Our World	6,000	● 0730/0800	▲
Crunch Time	11,000	● 0730/0800	▲
Flushed	1,000	● 0700	▲
It's Academic	2,000	● 0700/0730	▲
Kitchen Whiz	13,000	● 0800	▲
Match It	1,000	● 0700	▲
Move It	14,500	● 0730	▲
Scope	4,000	● 0830	▲
Totally Wild	3,000	● 0800 ● 0800	▲

#### Timeslot

Weekdays ●

Friday ●

Saturday ●

Sunday ●

Monday – Wednesday ●

Monday – Friday ●

Monday – Sunday ●

Thursday – Friday ●

#### Program Type

Pre-School ▲

1st release – C Drama ▲

Repeat – C Drama ▲

1st release – C non Drama ▲

Repeat – C non Drama ▲

# Why are child audiences declining?

One theory often put forward to explain why fewer children are watching children's programming on commercial free-to-air TV is that they can't find the programs on the new multi-channel services offered by the networks – 7TWO, 7mate, ELEVEN and 9GO!. Another theory is that the programs are not offered at times that suit kids.

These theories don't stand up to scrutiny. First, providing multi-channel services lets commercial broadcasters create kids' destinations for times of the day that are suitable for children. In fact, C and P programs are all at regular times when the child audience is most likely to be available, including weekdays before and after school and weekends for C and mornings for P programs.

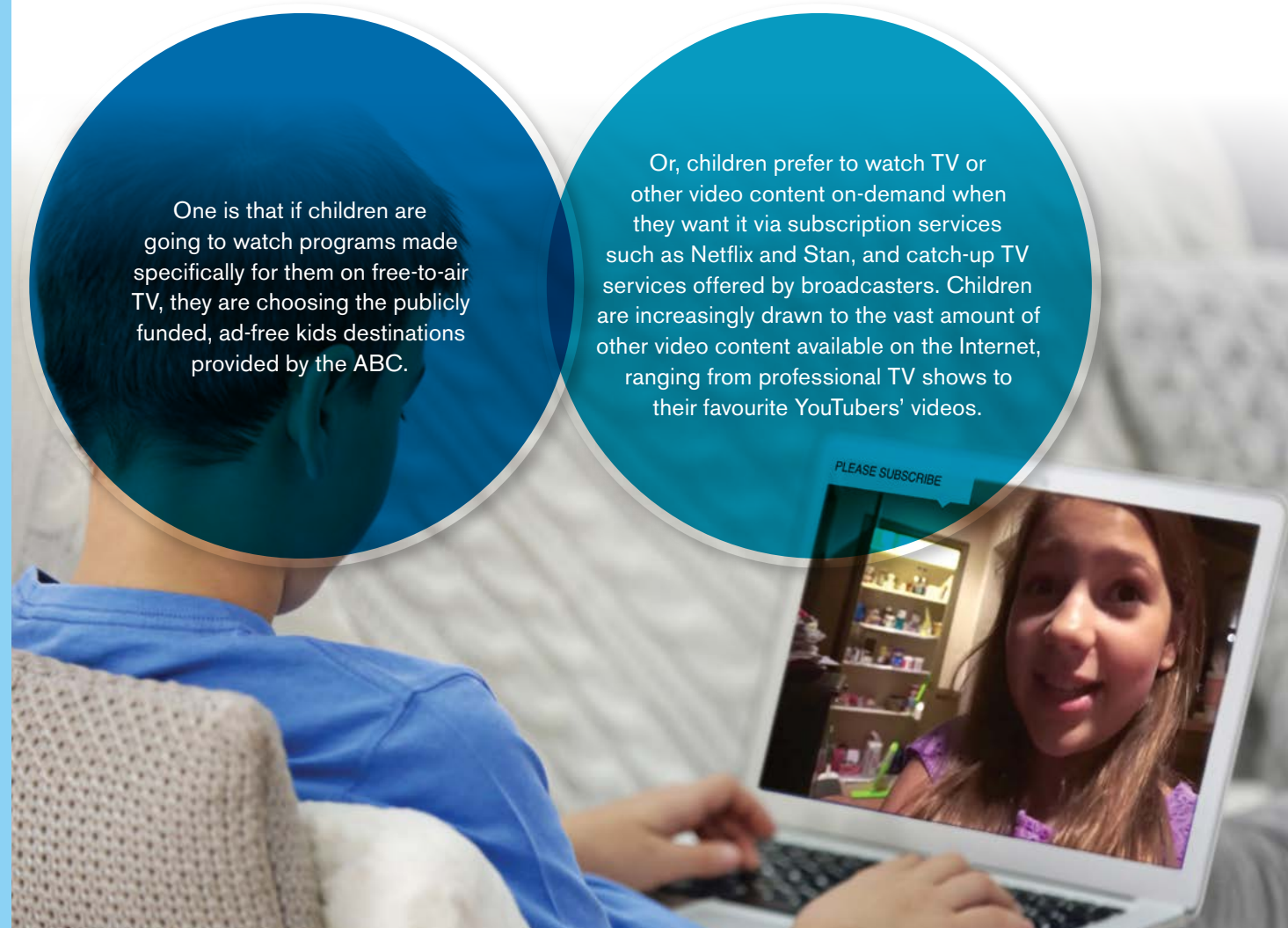
Even better, programs are much less likely to be 'displaced' on multi-channels by news events or other urgent interruptions. This used to happen regularly when children's programming had to compete with all other content on broadcasters' primary channels.

Secondly, the success of the ABC's dedicated services for children – especially ABC Kids – shows kids and their parents are happy to watch multi-channel services.

**So, what's happening? Our analysis shows, supported by recent findings by the Australian Communications and Media Authority, that children are showing two strong preferences:**

One is that if children are going to watch programs made specifically for them on free-to-air TV, they are choosing the publicly funded, ad-free kids destinations provided by the ABC.

Or, children prefer to watch TV or other video content on-demand when they want it via subscription services such as Netflix and Stan, and catch-up TV services offered by broadcasters. Children are increasingly drawn to the vast amount of other video content available on the Internet, ranging from professional TV shows to their favourite YouTubers' videos.



# Children do watch commercial TV for other entertainment, often with their families

The most popular programs on free-to-air TV among kids aged up to 14 are entertainment shows including *MasterChef Australia*, *The Voice* and *My Kitchen Rules*. These programs attracted audiences of between about 150,000 and 220,000 children in 2016.

These programs are produced in Australia, generating jobs and providing invaluable production experience for thousands of Australians both on- and off-screen. These popular programs also deliver a range of major social and cultural dividends, including telling rich Australian stories, communicating a strong sense of Australian culture and identity, providing inspirational and aspirational Australian narratives and encouraging family co-viewing.

## Top 10 programs watched by children (0–14 years) on free-to-air channels in 2016

Rank	Program	Channel	Origin	Level 1 Description	Audience (0–14)
1	MasterChef Australia	TEN	Australia	Reality TV	219,000–121,000
2	The Voice	Nine	Australia	Light Entertainment	219,000–139,000
3	I'm a Celebrity... Get Me Out Of Here!	TEN	Australia	Reality TV	206,000–120,000
4	The Block	Nine	Australia	Reality TV	194,000–124,000
5	My Kitchen Rules	Seven	Australia	Reality TV	189,000–148,000
6	Play School Celebrity Covers	ABC2	Australia	Children's	177,000
7	You're Back in the Room	Nine	Australia	Light Entertainment	177,000–129,000
8	The Wiggles Meet The Orchestra	ABC2	Australia	Children's	177,000
9	Ben & Holly's Little Kingdom	ABC2	UK	Children's	174,000–131,000
10	Despicable Me 2	Seven	USA	Movies	170,000

Source: OzTAM, *Children's television viewing and multi-screen behaviour*, ACMA, August 2017.

Top programs on free-to-air TV, 1 January 2016, 5 city metro. Consolidated. Note: Top 10 programs have been derived from a condensed top 75 programs list, where programs with multiple entries have been removed and ranked on the highest rating episode, indicating a range in average audience figures for all episodes that appeared in the top 75. Sporting programs have been excluded.

I am just thinking of my own viewing habits with my own children. My 13-year-old loves to watch *MasterChef* – he watches it every night, and he wants me to sit down and watch it with him when I am home. My 11-year-old sits there and watches *The Voice* and turns his chair around and dongs the buzzer and all the rest of it, and he wants me to sit there. But I cannot remember them watching other children's TV programs.

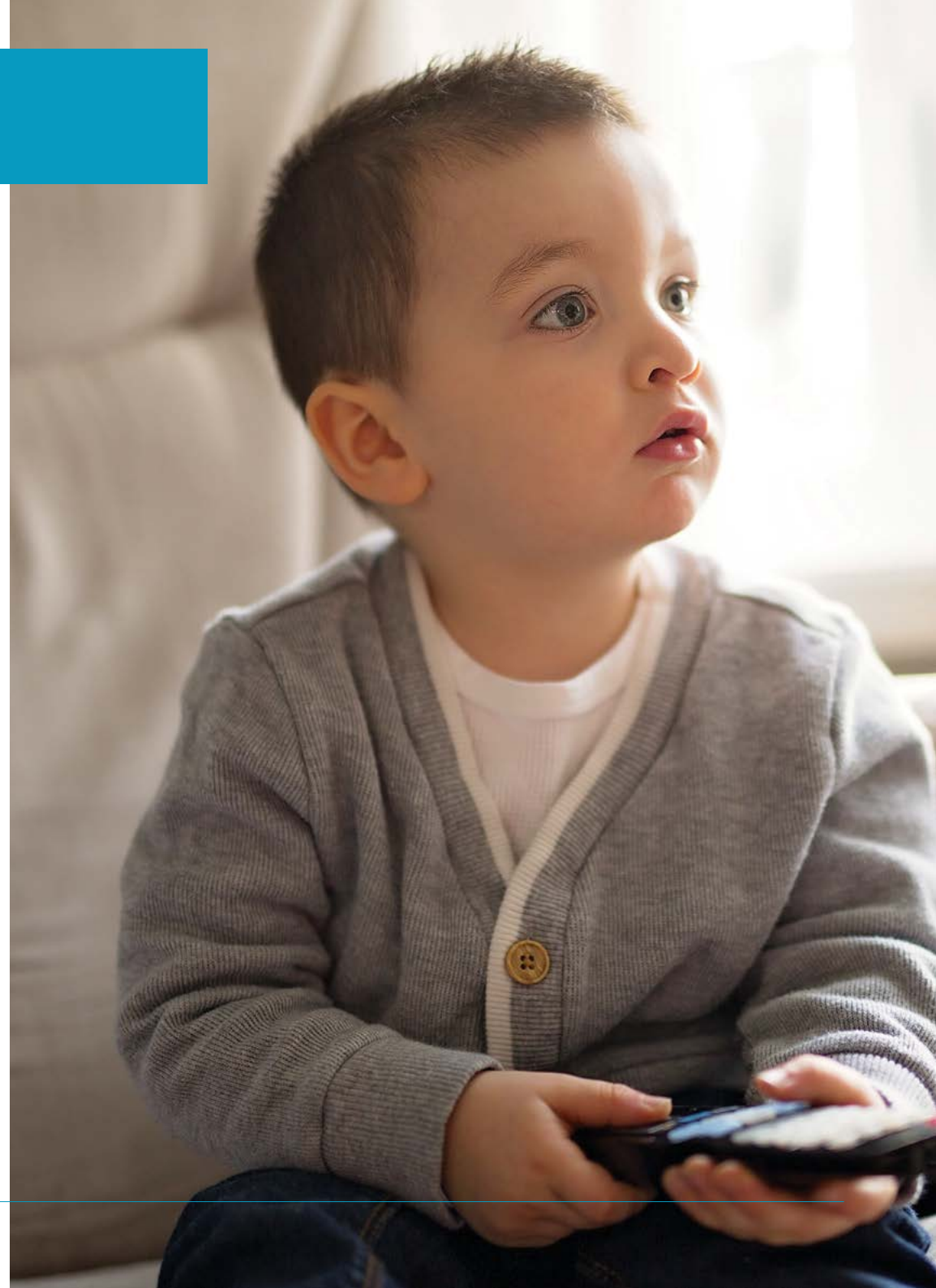
**Mr Luke Howarth** MP, Chair, The Standing Committee on Communications and the Arts, 20 July 2017, during inquiry into the growth and sustainability of the Australian film and television industry.

# ABC dominates kids' TV, especially for preschoolers
















Where children are watching children's programming on free-to-air broadcast television in Australia, it's almost always on the ABC.




This reflects the national broadcaster's decision to create two ad-free channels as dedicated destination services for children's programming: ABC Kids (previously ABC2) and the more recent ABC ME for older children and teens. ABC ME was originally launched as ABC3 in 2009, supported by specific government funding.

It's notable that all the top-rating programs below are for younger children watching on ABC Kids. Like Nine with 9GO!, it is proving hard for any free-to-air broadcaster to attract teenage viewers in the era of on-demand TV and near-infinite Internet options.



### Top 15 children's programs watched by children 0–14 years on FTA TV, 2016

Rank	Program and time	Channel	Origin	Average AUD	TARP %	No. of episodes <sup>^</sup>
1	<i>Play School Celebrity Covers</i> – 	ABC2	Australia	177,000	5.6	1
2	<i>The Wiggles Meet The Orchestra</i> – 	ABC2	Australia	177,000	5.7	1
3	<i>Ben &amp; Holly's Little Kingdom</i> – 	ABC2	UK	174,000	5.6	1
4	<i>Teacup Travels</i> – 	ABC2	UK	152,000	4.9	62
5	<i>Go Jetters</i> – 	ABC2	UK	150,000	4.8	112
6	<i>Hey Duggee</i> – 	ABC2	UK	147,000	4.7	122
7	<i>Ben &amp; Holly's Little Kingdom</i> – 	ABC2	UK	142,000	4.5	187
8	<i>Peg + Cat</i> – 	ABC2	USA	139,000	4.4	91
9	<i>Octonauts</i> – 	ABC2	UK	138,000	4.4	360
10	<i>The Gruffalo</i> – 	ABC2	UK	137,000	4.4	1
11	<i>Peppa Pig</i> – 	ABC2	UK	137,000	4.4	365
12	<i>Hoot Hoot GO!</i> – 	ABC2	Australia	135,000	4.3	97
13	<i>Thomas and Friends: Misty Island Rescue</i> – 	ABC2	UK	135,000	4.3	1
14	<i>Peter Rabbit</i> – 	ABC2	UK	135,000	4.3	362
15	<i>Bob The Builder On Site: Trains &amp; Treehouses</i> – 	ABC2	UK	132,000	4.2	1

Time Key	
AM	
PM	
Evening	

Source: OzTAM, *Children's television viewing and multi-screen behaviour*, ACMA, August 2017. Average audience, 1 January and 30 December 2016, Sun – Sat, 5 city metro. Consolidated. Note: Programs with multiple entries have been removed and ranked on the highest rating episode.

<sup>^</sup> Number of episodes – for programs with multiple episodes, the audience and TARP is an average across all episodes (as calculated by OzTAM).

# The new options children watch most

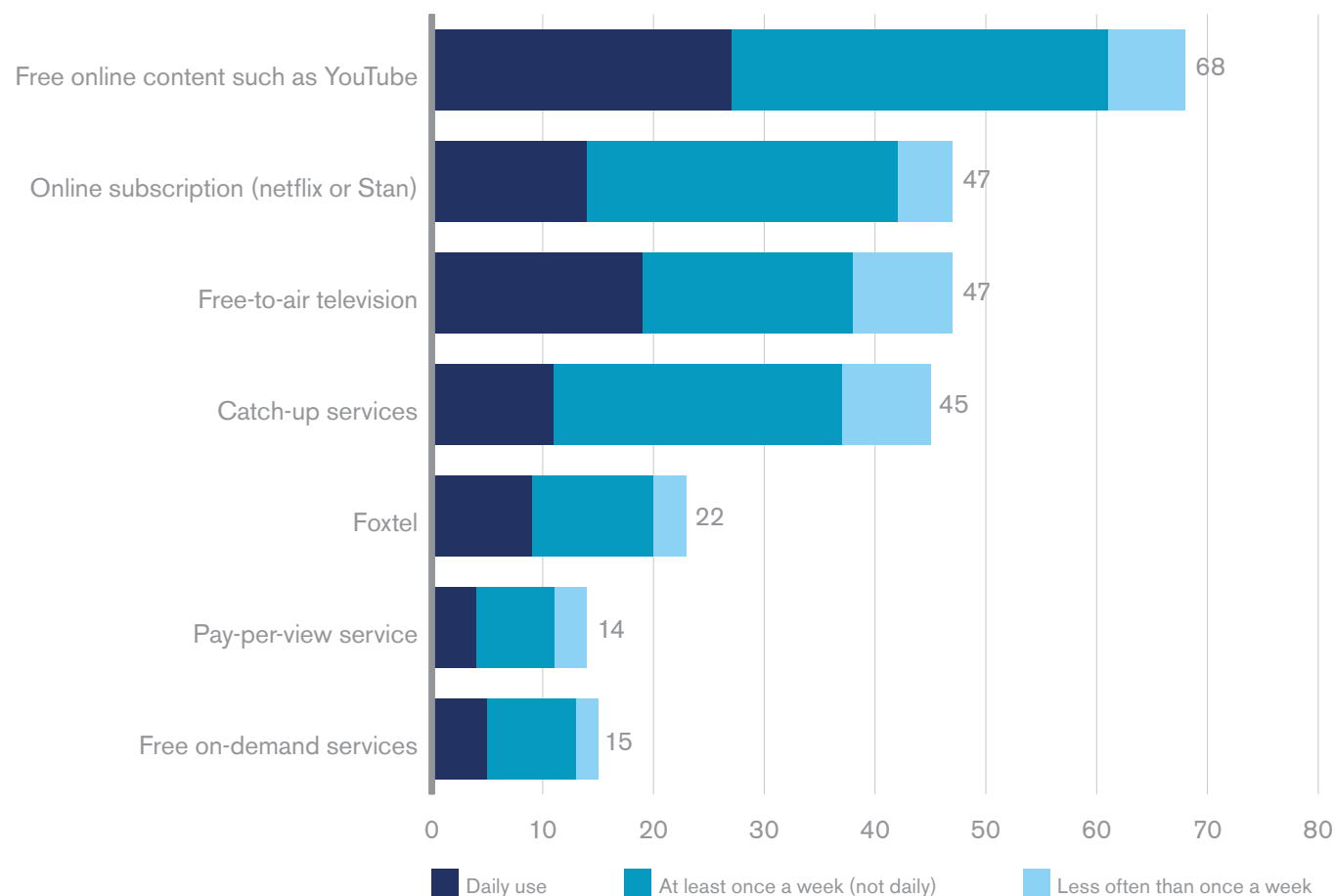
Today's kids are more likely to watch children's programming on the Internet – especially on YouTube – than free-to-air television of any kind. They're also more likely to find it via an on-demand subscription service such as Netflix or Stan than traditional TV.

In terms of catch-up TV, in the month of September 2017, *Peppa Pig: The Golden Boots* and *Fireman Sam Special: Heroes of the Storm* were in the Top 20 of shows watched on these services in Australia. Both recorded video player measurement (VPM) ratings of more than 100,000. (The VPM score is calculated by dividing the total minutes played by the content length, resulting in something equivalent to average audience.)

By comparison, viewing rates for C and P shows available on free-to-air catch-up services were almost negligible. For example, shows like *Imagination Train*, *Magical Tales* and *Hiccup & Sneeze* all had VPM averages of less than 100.

In addition, a recent survey of parents and guardians by the Australian Communications and Media Authority (ACMA) found that 68% of children aged 0-14 watch children's programs on demand for free over the internet, from sites such as YouTube and nearly half use online subscription services like Netflix or Stan.<sup>2</sup>

Platforms used to watch children's programs, by frequency



Source: Children's television viewing and multi-screen behaviour, ACMA, August 2017.

Base: Selected child aged 0-14 who in a typical week watches children's television programs, movies, videos or DVDs, as reported by their parents, guardians and carers (n=1,259). Includes 'can't say' and non-responses. Note: Data may not add up to displayed totals due to rounding.

<sup>2</sup> Children's television viewing and multi-screen behaviour, ACMA, August 2017, p20

# The digital devices children use

The ACMA report also showed just how many digital devices children use to access video content. While the traditional TV remains first choice, kids aged 0–14 now use an average of 3.2 devices to watch children's programs. Within that age range, their tendency to use multiple types of devices increases as they get older.

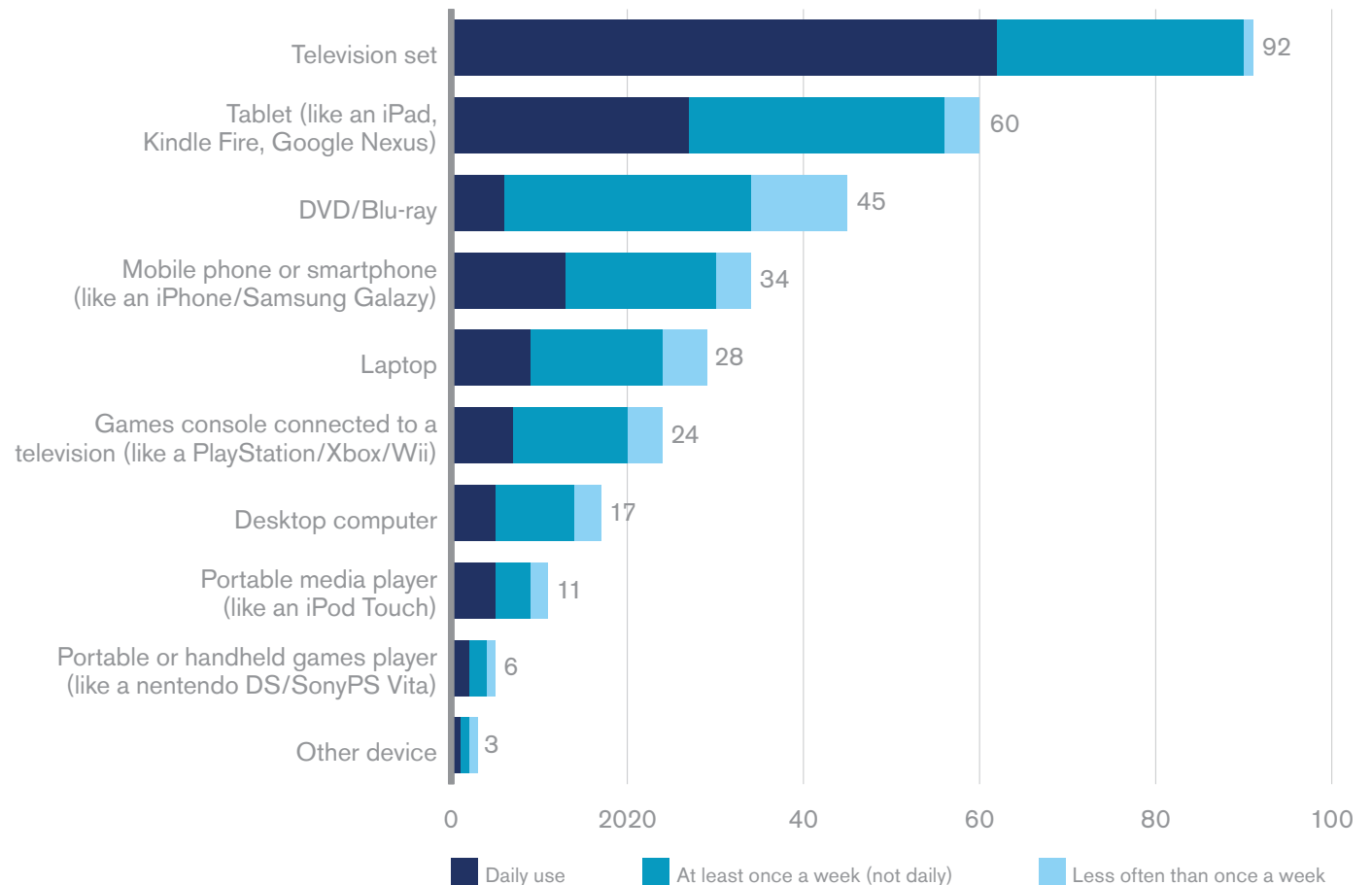


Kids aged 0–14 now use an average of

# 3.2 devices

to watch children's programs

## Devices being used to watch television in 2017



Source: Children's television viewing and multi-screen behaviour, ACMA, August 2017.

Notes: Base – selected child aged 0–14 who in a typical week watches children's television programs, movies, videos or DVDs, as reported by their parents, guardians and carers (n=1,252). Excludes 'can't say' responses.

# Summary

This report shows that children's consumption of commercial free-to-air programming has changed radically over the past decade – and is a long way removed from the days when hundreds of thousands of Australian kids sat down simultaneously to watch the latest episode of *Skippy*.

Other reports show that total 'screen time' is up for children. However, the number of kids aged up to 13 watching C and P programming on commercial free-to-air TV has more than halved since 2005. When kids do watch commercial free-to-air TV in large numbers today, it's to see general family entertainment shows and major events.

Despite these trends, commercial free-to-air broadcasters are still required to screen a collective total of at least 1,170 hours of programming annually for children aged up to 13, to meet C and P quota obligations imposed by the government.

The government is currently reviewing how content is regulated in Australia. The free-to-air TV industry welcomes this review and believes there is a particularly urgent need to reform the regulation of children's television to better align to kids' viewing behaviours. Today's outdated and ineffective settings need to be replaced to ensure kids are served by a strong and sustainable television industry that delivers programming in the formats they prefer.

**For further detail, please see Free TV's submission to the review.**

...there is an urgent need to reform the regulation of children's television... to ensure Australian children are served by a strong and sustainable television industry that delivers programming in the formats they prefer.



# Appendix 1

## Average and highest audiences, and average TARPs for C- and P-classified programs broadcast on commercial free-to-air TV in 2010, 2013 and 2016

	2010	2013	2016	2010	2013	2016	2010	2013	2016	2010	2013	2016
	Total Individuals			Ppl 0–4			Ppl 0–13			Ppl 5–13		
Average audience	61,500	28,900	15,200	6,100	2,300	2,400	15,500	7,400	6,800	9,600	5,100	4,500
Highest audience	268,000	171,000	89,000	24,000	13,000	16,000	58,000	30,000	46,000	41,000	25,000	31,000
Average TARP	0.4%	0.2%	0.1%	0.6%	0.2%	0.2%	0.6%	0.3%	0.2%	0.6%	0.3%	0.2%
Average audience less than 10,000	8%	35%	51%	83%	99%	97%	23%	78%	79%	51%	82%	84%
Average audience less than 25,000	16%	67%	84%	100%	100%	100%	86%	95%	93%	98%	99%	97%
Average audience less than 50,000	37%	82%	93%	100%	100%	100%	99%	100%	100%	100%	100%	100%
Average audience less than 75,000	70%	92%	99%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Average audience less than 100,000	89%	92%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
	Total Individuals			Ppl 0–4			Ppl 0–13			Ppl 5–13		
	2010	2013	2016	2010	2013	2016	2010	2013	2016	2010	2013	2016
Average audience	61,500	28,900	15,200	6,100	2,300	2,400	15,500	7,400	6,800	9,600	5,100	4,500
	Total Individuals			Ppl 0–4			Ppl 0–13			Ppl 5–13		
	2010	2013	2016	2010	2013	2016	2010	2013	2016	2010	2013	2016
Average TARPs	0.4%	0.2%	0.1%	0.6%	0.2%	0.2%	0.6%	0.3%	0.2%	0.6%	0.3%	0.2%
	Total Individuals			Ppl 0–4			Ppl 0–13			Ppl 5–13		
	2010	2013	2016	2010	2013	2016	2010	2013	2016	2010	2013	2016
Programs with average audience less than 10,000 viewers	8%	35%	51%	83%	99%	97%	23%	78%	79%	51%	82%	84%

Source: OzTAM research, completed in mid-2017. This focused on audiences for programs classified as C (for children aged 5–14 years) and P (for preschool children aged under five years) broadcast on any commercial free-to-air TV channel in the calendar years of 2010, 2013 and 2016. OzTAM reviews 122 programs in 2010, 83 in 2013 and 67 in 2016.

