

Changing media landscapes – How do public broadcasters world- wide react to these changes?

Programme makers worldwide were asked how they react to the changing media usage and habits of children.



*Alice Webb,
BBC Children's
(CBBC; until
March 20th,
2020), UK*

At BBC Children's we have found that our audience

expect to find their favourite content everywhere – TV, web, on-demand and mobile. Our purpose is to reach all UK children with British-made public service content, and in 2017 we implemented a strategy called Kids 2020 to help us achieve that on all platforms.

A lot of work has gone into our websites and apps. For our youngest 0-6 audience we have created a suite of 4 apps that meet all their development needs – *Get Creative*, *Go Explore*, *Storytime* and *Playtime Island*. This approach reflects the increasing usage of tablets we are seeing among this age group. For 6-12s the CBBC website has led, particularly via games which relate to our TV programming and through *Newsround*. Our web stories are now as popular as *Newsround*'s TV bulletins. We have maintained our mix of all genres across TV programming, but have had to carefully consider the number of titles we commission. The UK linear TV channel market was already intensely contested, but now with on-demand we are competing with the whole world. Too many titles risks nothing cutting through, and we

have to invest to meet the audience's increased expectations of production values and format quality. However, our learning is that when you get it right children will want to watch the content again and again.

Our critical platform for the future is BBC iPlayer. We see our audience moving ever more to on-demand, as the growth of Netflix, YouTube and others demonstrates. All our TV shows are available on iPlayer, plus we have already made a small amount of programming just for this platform – and we intend to do more in the future. It's a journey that we are still at the beginning of. Some of our programming does appear on other global platforms such as Netflix, whether via sales or co-production arrangements. We have clips from our programming and other short-form content available on YouTube, but we do not put up whole episodes.

We have changed a lot, and will continue to do so – but our core mission is still to delight and inspire children with our content, wherever and however consumed.



*Morten Skov
Hansen,
DR Medier
Ramasjang og
Ultra, Denmark*

In Denmark one thing is always constant when it comes to children's media: The world of children's media is ever changing. This can be triggered by new competitors entering the market, a shift in children's

media behavior, new technologies or political demands. But as a public service broadcaster we always need to adapt to these changes to secure that we stay relevant for the target group and stand out in the market. With the abundance of content, the role of public service is more than ever put on the edge.

Since 2012 the viewing patterns in Denmark have changed dramatically. The media use has become more fragmented and digital. Since 2012 the oldest kids' daily time spent on linear TV has decreased by 76%. Netflix and YouTube are now major players in the market and at the same time kids' access to mobile phones has changed their habits and preferences.

As a consequence of the altered media use DR is closing the linear channel for the oldest kids and moving the offering fully digital. At the same time, we are changing our target group definition. DR Ultra is our channel brand targeting the oldest kids. It used to have the 7- to 12-year-olds, now we aim for the kids between 9-14. DR Ultra used to be an omnibus offering with every genre of content, now we are a brand with a clear promise. Going more digital, we have narrowed our content offering to fiction, factual, and kids news. We have built strong sub-brands with high volume. We have daily news and our fiction series *Klassen* (*The Class*, III. 1) publishes 3 episodes every week all year round. All this from the belief that we can't afford to be irrelevant in periods. We always need to be top of mind with content and a brand that the oldest kids relate to.



Screenshot of Klassen © DR

Ill. 1: The series *Klassen* is broadcast with 3 episodes per week to stay top of mind with the target group

The digital approach to our kids offering has influenced all aspects of what we do and how we do it. A good story is still a good story. But we need to understand the full user journey. In the old world of linear TV, kids would watch your flow of programs. Now they actively have to search for it, choose it and stay tuned.

Our ambition is to be the one brand that Danish kids know the best, understand their world and follow their preferences. We want to build our offering and brand on the uniqueness of being a super local Danish offering. We can't compete with Netflix or Disney when it comes to budgets, but we can be the most local and relevant offering in the market.



Dr. Astrid Plenck,
KiKA, Germany

The German (children's) media market is, and has always been, distinctive: it is more conservative

and more traditional than others, and is characterised by high quality. Linear TV usage is still relatively stable; non-linear offerings are used to supplement linear TV, or in connection with it. Nonetheless, children's media usage times are changing at the expense of linear TV.

KiKA's contents offer both children and families successful brands from the public-service children's portfolio. We supplement these with new offerings which carry our values:

interest in participation and interaction, we are creating products that invite participation, e.g. topical live programmes on themes such as climate protection, feature-length shows such as *Dein Song [Your Song]*, the *KiKA LIVE Adventsshow* or participatory activities linked with the tenth birthday of our multimedia pre-school offer *KiKANiNCHEN*.

60% of our target audience have access to a smartphone or tablet that they can use autonomously. The fact that kika.de is one of the top 3 children's websites confirms that what we are doing is right: linear series are being consumed on a mobile or time-delayed basis via our website or apps. At the same time, we find that children are watching or "binge-watching" non-linear contents on an increasingly linear basis. Nonetheless, children have very different and very specific requirements when it comes to the respective platforms. This is why we selectively provide – in the form of KiKA-TV, kika.de, kikaninchen.de, the pre-school and the media centre app, as well as our social media presences – coordinated touchpoints with platform-specific content.

The *KiKANiN-CHEN* app is a protected space that 3- to 6-year-olds can explore safely when they are out and about. The app invites children to play, discover and learn. It has already

diversity, guidance, the concept of democracy, knowledge and fun are the central themes and motivations we anchor in all our products.

In order to serve the increasing

been downloaded over 600,000 times. The positive reviews show how much users like the offering and how far it meets "their" needs in terms of creative play and independent activity in a digital world.

The KiKA-Player (Ill. 2) is our latest curated offering. This app, with its service functions for children and parents, has been downloaded over 400,000 times. The fact that user numbers are continually increasing for all offerings shows that KiKA is focusing on the right touchpoints and has designed its offerings with the needs of its target group in mind. We regularly test our apps in conjunction with children and within families so that we can learn more about usage competencies and scenarios. In doing so, we are not only building on the media literacy of the target group but are also continually fostering it.

KiKA is the first educational broadcaster for children and is Germany's favourite children's channel. It is important to remain relevant within the linear space, whilst at the same time also consolidating non-linear, interactive products. Our aim is to generate enthusiasm for our offerings via popular platforms such as YouTube, where we can target users who, up until now, have used our original KiKA products either only very little or not at all. The video platform provides a taster of selected KiKA programming and is a product interface for platform-specific content. In accordance with our commercial contract, we license selected content



Ill. 2: KiKA's video products are available free of charge and ad-free via KiKA-Player on smartphone and tablet

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to streaming platforms. Here too, via our content, we aim to get users excited about KiKA's own offerings, which offer much more than the streaming providers do.

Content design is actually dependent on the platform and the usage scenario. Why does a user choose to engage with particular content? Whether someone wants to watch a LOLLYWOOD film on television on the couch, or live-streamed, or on KiKA-Player on a tablet in bed, nothing changes in terms of the representation form of the film. It is different if users are looking for a quick diversion, e.g. on the school bus, or are researching a particular question for a presentation. In such situations, users are looking for short, concise and relevant content. This is why we provide discrete platform-specific content that meets the needs of the target groups and the respective usage situations.

Our development areas are:

1: Research usage situations, motivations and patterns; increase proximity and emotionality via participatory, interactive and platform-specific elements so that KiKA remains target-group-specific and relevant to children of different ages – across all platforms 24/7.

2: Incorporate internal and contract-specific public-service media responsibility into each digital product, and commit to monitoring values and added value in order to also ensure that we are also “the” public-service quality children’s brand in the digital world.

Takako



Nakamura,
NHK, Japan

Under the drastically changing media environment, NHK Educational Channel has been

consciously shifting our contents, not only offering passive viewing experi-

ences to children viewers, but also enhancing their interactive experiences.

As a public broadcaster, it is important for us to invite young viewers to the world beyond the screens rather than just making them glued to them.

To enhance interactivity, we have increased contents in which children can participate in, for example quizzes or games via data broadcasting. This means that by clicking certain buttons on the remote control, a programme, which is embedded in the bandwidth of broadcasting, responds to the clicking and the children are able to transmit data through the TV screen. Especially since the early 2000’s we have produced interactive game shows to which real-time access is possible. One game show makes it possible for children throughout Japan to step up collaborative efforts to help characters of the programme. Regarding school programmes, we let children have active discussions after watching the shows by posing open-ended questions instead of just cramming knowledge into children’s heads (e.g. *Think Like a Crow*, Ill. 3).

We have developed some apps and produced short clips to adjust to diversified screen devices. We produce short clips from longer programmes to utilize the clips in school classes. For the much younger target group, up to 7 year old children, our apps provide contents that are valuable as catalysts for creating plays in children’s daily lives. To make great use of mobile devices which can reach various children, such as those who are hospitalized, some clips are designed to bring joy even without sounds. Some of our children’s shows can be watched on NHK’s YouTube



Screenshot of *Think Like a Crow* © NHK

Ill. 3: By asking open-ended questions *Think Like a Crow* encourages the children to discuss the addressed issue after the show and draw their own conclusions

channel and we are enhancing the quality of online services on our own website.

I imagine that every public broadcaster has been struggling with creating new values in the rapidly changing media environment. To deal with this difficult situation, NHK Educational Channel has been trying to include more diversified values for younger children viewers, such as values of challenged children or children from different cultural backgrounds, even though those values are what we have been very conscious of as a public broadcaster. In that sense, more importance should be put on keywords such as “inclusive” or “universal” when creating contents in our channel.



Marney
Malabar,
TVO, Canada

A significant change over the past couple of years which TVOkids has noticed is a

change in children’s attention spans with regards to program durations. Our audience is looking to consume shorter and shorter content, it seems our young audience of 2- to 8-year-olds want bite-size offerings. Whether TVOkids is co-producing or acquiring content, what was 11 minutes is now 7 minutes, 7 minutes is now 5 minutes and presently even a 5-minute episode starts to feel long. Another super

positive change TVOkids has noticed recently is the acceptance of diversity in more than one form. TVOkids looks to greenlight and acquire programs which represent diversity of cultural, gender, body size and diversity thought in all our programming choices. This request is no longer a unique request but rather one that is becoming authentic and baked into more and more properties we are being pitched.

Currently TVOkids does not have a streaming app but we do stream our broadcast programs 24/7 on our ad-free YouTube channels as well as on tvokids.com. TVOkids has rights to only stream content in Canada which means all content is geo-blocked for Canada only. When we premier a new series we launch on all channels on the same day, episodes as well as any HTML5 activities produced to support the series. In general, we know from data, our audience watches content approximately for 4 to 6 minutes when watching an 11 min episode. Basically, once clicked if the program is one of our more popular programs 50% of the program will be viewed. This knowledge has informed the creation of shorter programs. Diversity of platforms and accessibility of playlists has influenced the duration of programs. We have successfully created “20 minutes / 30 minutes / 60 minutes playlists” which seem to hold our viewers’ attention for a longer viewing window but we look to commission shorter shows due to online consumption trends.

TVOkids has in-house game developers who have always produced innovative, quality online experiences for tvokids.com users. Over the past couple of years, that team has been focusing on games for classroom use and we have been working with our co-production partners producing HTML5 games and online activities to extend the brand and learning opportunities of TVOkids original programming. Some of these games and activities are also apps. In our experience, best interactive experience typically

comes from games designed by digital media game designers/producers who work directly with TVO’s in-house digital team. It is critical that games are tested with children at the various stages

of production and that the user experience is different than what was experienced when viewing video content. On tvokids.com we still have games developed 10 years ago that continue to perform which reminds us of the importance of creating truly good games. A good gaming experience is truly what a child is looking for when they come to play online at tvokids.com.

As the numbers on our linear channel continue to decline due to cable cutting TVOkids YouTube channel’s popularity is growing. Last year 2 of our YouTube channels received YouTube’s Silver Play Button for 100,000+ subscribers, considering the fact that TVOkids YouTube channel is ad-free and we have no paid promotion this achievement is quite remarkable!



*Linda Simensky,
PBS KIDS, US*

At PBS KIDS, our mission is to create shows that are both smart and funny for kids between the ages of 2 and 8. We know the best way to engage kids is through humor, entertaining stories, and well-developed characters who reflect our audience’s interests and experiences. Children are born curious about the world, which is why our characters role-model the kinds of things you can do with that curiosity: ask questions, connect with others, explore new things, and have



Screenshot of YouTube © PBS

Ill. 4: Extending series onto other platforms: agent Olympia from *Odd Squad* (PBS) has her own YouTube channel *OddTube*

adventures along the way. To achieve this, we have been open to any format for our shows, although most of what we’re pitched is animation. We have been specific about the length. Most of our shows are half hour shows, either 2 11-minute episodes or 3 7-minute episodes.

Our philosophy regarding the development of content has not changed drastically in the last 15 years. We have always been open to hearing producers’ ideas and we believe there are many ways to approach what kinds of content we are looking for. However, our sense of how and where our viewers will be watching has changed completely. We used to think about our content as being television programming. Now we think of it as narrative content that can be streamed anywhere, on any device. A viewer can watch several episodes of the same series on a streaming platform, watch their local PBS station or can watch a livestream of what’s running on the PBS KIDS Channel.

As we have considered the new platforms that have emerged, we have made sure our content is wherever kids are watching. We have both a video app and a games app. We are on most platforms. Most of our shows are available on Amazon, and many are also available on YouTube. At one time, we ran mostly clips of series on YouTube, but over time, we have seen that our viewers prefer full episodes. Beyond that, we have jumped boldly into the world of experimentation. We

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have extended some of our series onto other platforms, such as *OddTube*, where a character from the show *Odd Squad* has her own crazy YouTube channel (Ill. 4). Ruff Ruffman, of *Fetch! With Ruff Ruffman* fame, found a new job hosting a YouTube science series. We are currently experimenting with an integrated game and video series based on a book.

We produced some PBS-branded nursery rhymes for YouTube, and they have gone over well, so we will probably produce more. The viewing patterns for all these platforms are shifting as the viewership grows, so we are watching what happens and can change our strategies as needed. We are currently working on a broader content strategy moving forward. The biggest piece of this is turning out to be our need to do research. There is so much we still don't know about what impact these new platforms will have on length of episodes, educational impact, or even humor. It is clear that no matter what we do, we need to remain flexible.



*Aldana Duhalde,
Pakapaka
(until January
31st, 2020),
Argentina*

For the Public Media System of Argentina it is today very important to strengthen its nationwide traditional broadcasting with an online and mobile offer. Therefore, it has developed Cont.ar, the free platform with all its new content and archives. Since online and mobile viewing has also increased considerably in Argentina in the past few years, for the national children's channel Pakapaka, Cont.ar brings new possibilities to offer children various genres for various target groups at any time and any place, free of any charge. Pakapaka started as a cable service in 2010 under the Ministry of Education and was closely related to education

and schools. Programs reached their audience not only via broadcasting, but also via a school distribution dynamic. Today Pakapaka is evolving to become a more general public children's channel, still with educational and cultural objectives, but using other ways and narratives to connect and interact with its audiences.

For instance popular media platforms are increasing in importance in Pakapaka's distribution strategy, such as YouTube (300,000 subscribers) and Facebook (200,000 subscribers). The mentioned Public Media System is pushing forward the national online platform Cont.ar as the country's response to the penetration of international platforms such as Netflix or Disney. It is important to share that the majority of Cont.ar content in the section "infancia" (childhood) is created by or comes from the archives of Pakapaka.

Regarding the new proposals, in 2019 the flagship for kids 7-12 is *Paka-Data*, a daily 5-minute news update and a special weekend edition, realized in cooperation with the international news for kids network WADADA. This is an important step for the channel to connect with journalistic stories especially constructed for kids, which does not only come from the context of the country, but from outside of Argentina and from all around the world. Another initiative is the participation in the international series *The Day I Became Strong* (created by Dr. Maya Götz) - short films based on childhood memories to foster resilience -, which includes 4 local stories produced by Pakapaka offering our own landscapes, characters and possibilities of production. For the preschoolers,

Pakapaka is developing *PakapakaPAK*, a daily magazine that presents a mix of short inspirational and educational items. In this challenge, Pakapaka is cooperating with the global preschool project "EBU item exchange", in which broadcasters from Europe, Africa and Asia exchange preschool items. Soon children in Argentina will have access to stories and ideas of peers in their own country, Latin America and the world.

In times of an acceleration of the migration phenomenon, one of our urgent goals is to connect kids no matter where they come from and help them to develop empathy for others and their different realities. Therefore connecting children is a key aim of the channel. One of our recent productions, *Cazadores de Sonidos* (*Sound Hunters*, Ill. 5), tries to do this not only through the verbal language but also by addressing a sensorial dimension of listening and being with others. This program is possible thanks to new technologies that allow the co-creation process despite the huge distances that define Argentina's geography. The "mission" is to create a national map of sounds and songs developed by kids all over the country, but this map has more to do with feelings than with frontiers. ■



Screenshot of *Cazadores de Sonidos* © Pakapaka

Ill. 5: For *Cazadores de Sonidos* (*Sound Hunters*) children collect music, songs and sounds to create a map of Argentina's sounds and songs