



The international perspective

The future of children's programming research report - Online annex

Research annex

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Overview: the international perspective

1.1. Summary of findings

- Children's television markets internationally have been shaped by two underlying trends: the increase in multichannel penetration and the growing number and popularity of dedicated children's channels. In 2006, the vast majority of households in Germany (98%), Sweden (87%), Canada (81%) and the USA (86%) had multichannel television. The UK is now approaching these markets, with a 79% take-up rate, while multichannel penetration in France (46%) and Australia (41%) is lower.
- In 2006, the UK had the highest number of dedicated children's channels among the countries surveyed, with 18 channels (excluding time-shifted channels). France had the second highest level of dedicated provision, with 17 channels, followed by the USA with 15.
- As the number of children's channels grows, viewing is migrating away from the main channels. The relative decline was highest in the UK, where children's viewing of the main five terrestrials fell by nearly a third between 2002 and 2006. The highest absolute decline, of 23 percentage points, was in Sweden. The declines were slowest in Canada and the USA – the two markets where dedicated channels have long dominated children's viewing.
- In countries with historically high multichannel penetration, dedicated channels dominate children's viewing, suggesting that this is the likely direction for the UK market. The top three dedicated children's channels accounted for 42% of all children's viewing in Germany and the USA in 2006, while in Canada 38% of children's viewing went to the top three children's outlets. In comparison, in the UK the top three dedicated children's channels (CBeebies, CBBC and Disney Channel) jointly attracted 8.5% of children's viewing in 2006).
- The overall provision of children's programmes on the main channels in the UK (4,252 hours in 2006) is similar to that of France (4,191 hours) and above that of Germany (2,843 hours), Sweden (2,267 hours), Australia (3,968 hours) and the USA (3,723 hours).
- The UK trend of declining children's output on the main commercial mixed-genre channels is echoed in other markets. In Germany, the main commercial channels showed 46% fewer children's hours in 2006 (1,603 hours) than in 2001. In France, commercial free-to-air channels reduced output by 22% since 2001, to 1,441 hours in 2005. Similar trends can be seen in Sweden and the USA. Despite a 12% fall since 2002, the UK had the highest level of provision to children on its main commercial channels at 2,437 hours in 2006.
- Broadcaster spend on children's television in the UK (£149m in 2006, excluding spend on repeats) was below estimated spend in the USA (£183m), but significantly above all other markets surveyed. Broadcasters in France (£74m) and Germany (£73m) are estimated to have spent half as much as UK broadcasters. Estimated broadcaster funding levels are lower in Canada (£43m), Australia (£38m) and Sweden (£16m).
- UK broadcasters had a relatively high share of originations, accounting for 73% of the total broadcaster spend on children's television. This was below that of their US (80%) and Canadian (77%) counterparts but above that of German (71%), French (54%) and Swedish (52%) broadcasters.

- Our data suggest that the children's production sector in the UK is more dependent on broadcaster funding (75% of funding in 2006 although this varies by sub-genre) compared to some other markets. For example, in Canada, only 30% of funding for children's programmes comes from broadcasters, with the rest accounted for by a combination of government funding, foreign and co-production spend, private investment and other industry funds.
- Our estimates show that the total amount of public funding (across all types of intervention including provision by public broadcasters) of children's television varies substantially between countries and is not directly linked to the range of interventions used. Spending on children's programmes (first-run, acquired and repeat) in the UK by the BBC and S4C (a total of £5.70 per child in 2006) was below the level of estimated public spend in Canada (£14.20 per child) and Sweden (£7.10). The UK spent more on children's programming per child than Australia (£4.80), France (£3.70) and Germany (£2.80).
- Three main types of public intervention are employed in the countries surveyed to support children's television: provision by publicly-funded broadcasters (i.e. those deriving the majority of funding from public sources); measures to support provision by commercial players via output and productions quotas; and government support via grants distributed by public agencies and/or tax benefits for production.
- France, Australia and Canada employ a broad range of interventions to support domestic programme production –all three have output and production quotas in place alongside substantial direct funding and tax breaks supporting local production in addition to provision by publicly-funded broadcasters.
- The USA, Ireland, Sweden and Spain use a combination of interventions, each underlined by specific policy goals. Guidelines for the amount of educational and informational programming for children are in place in the USA while in Sweden the largest commercial channel has an hours quota for children's output. In Ireland, direct funding and tax breaks are available to producers, while regional funding is available to producers in Spain.
- Publicly-funded broadcasters are the main intervention mechanism supporting provision of children's programming in Germany, the Netherlands, Denmark and Norway. In these markets some regional funding is available to children's television producers, but overall amounts are small. Italy can also be included in this category although the mixed public-private model of funding for its public broadcaster RAI means that output and investment obligations for RAI in Italy fall in between public provision requirements and the typical requirements for commercial channels.
- The motivations behind policy approaches in the countries examined vary substantially depending on regulatory goals and historical policy traditions. While most interventions support provision of locally-produced children's programming, the underlying rationale may be that of industrial support (e.g. animation funding in France), supporting cultural goals as part of broader cultural broadcasting policy (e.g. funding for Canadian content in Canada) or serving children's educational needs (e.g. educational content guidelines in the USA).

Figure 1: Summary of children's television markets in key countries surveyed

	UK	France	Germany	Sweden	Australia	Canada	US
Children (m)	11.6m	12m	12.6m	1.4m	4m	5.7m	60.7
Multichannel penetration (% households)	79%	46%	98%	87%	41%	81%	86%
Main generalist channels' share of children's viewing	46%	76%	42%	68%	73%	18%	24%
Children's output on main generalist channels (hours)	4,252	4,191	2,274	2,267	3,968	n/a	3,723
Number of children's channels (publicly funded in brackets)	18 (2)	17 (1)	9 (1)	7 (1)	6	7	15 (1)
Broadcasters spend on children's programming	£149m*	£74m	£73m	£16m	£43m	£38m	£183m
Public spend on children's TV – total	£70m	£35m	£45m	£10m	£19m	£81m	<£0.5m
Public spend on children's TV – per child	£5.70	£3.70	£2.80	£7.10	£4.80	£14.20	£0.00

Note: Data are for latest year available, which in most cases is 2006; reference points and sources are included in the section and more detail by country is provided in online research annex E, *Children's programming, the international perspective*. *For comparative purposes, the UK spend in this table excludes the cost of repeats and is different from the £178m reported in Section 3.

1.1. Introduction

As part of the research evidence for our review of children's programming in the UK we have looked at developments in this area internationally, surveying market trends and policy approaches around the world. Six countries were analysed in depth:

- in Europe, we looked at France and Germany. These are the largest television markets elsewhere in the EU, comparable to the UK in size and composition, with PSB systems existing alongside the commercial television markets;
- we also looked at Sweden for a Scandinavian perspective and because, as in the UK, publicly-funded channels do not take advertising;
- Canada and Australia were selected as the major English-speaking markets; and
- we have also considered developments in the US, home of many global children's media brands.
- In addition we have considered policy approaches to children's television in another seven markets: Italy, Ireland, Spain, the Netherlands, Denmark, Norway and Japan.

The analysis draws on several data sources:

- viewing data from the international television consumption measurement service Mediametrie/Eurodata TV;
- a study of production sectors in France, Germany, Sweden, Canada, Australia and the USA conducted by the consultancy Oliver & Ohlbaum Associates for this project;

- data provided by a number of third parties including national regulators, public service broadcasters and market intelligence services.

We would like to thank the following organisations whose data we have relied on in the report: Association of regulatory authorities (ALM), Australian Broadcasting Corporation (ABC), Australian Communications and Media Authority (ACMA), Canadian Film and Television Production Association (CFTPA), Canadian Radio-television and Telecommunications Commission (CRTC), Centre national de la cinématographie (CNC), Conseil supérieur de l'audiovisuel (CSA), Federal Communications Commission (FCC), GöfaK Medienforschung, Granskningsnämnden (GRN), Kent Asp, Médiamétrie, Public Broadcasting Service (PBS), Screen Digest, Sveriges Television (SVT), Zweites Deutsches Fernsehen (ZDF) and Shaw Rocket Fund.

Figure 2: Broadcasting outlet definitions used in this section

The differences in the way that broadcasting markets operate in different countries means that the terminology adopted to refer to different types of channels in the UK does not necessarily apply. The Overview section of this document uses the following definitions:

Main channels: the main national mixed-genre channels, including commercial and publicly-funded channels. This is the equivalent of what we refer to as the PSB main channels in the UK, but the term doesn't necessarily apply in other markets. For example, in Germany the majority of households receive the main national channels via cable or satellite, while in Australia this term refers to the three free-to-air networks operating in metropolitan areas (most regional broadcasters in Australia air content from one of the three metropolitan networks).

Main publicly-funded channels: these are national mixed-genre channels which derive the majority of their funding from public sources such as licence fee or government funds. In some markets there is a clear distinction with public channels deriving all of their funds from public sources (e.g. UK, France and Sweden). In other countries mixed models are in place, with advertising and other commercial income supplementing public funds (e.g. Italy, Spain and Ireland). While channels with mixed funding models are likely to be facing similar pressures to their purely commercial counterparts, for simplicity channels with over 50% of public funds have been included in this category.

Main commercial channels: commercial channels operating on a national basis. In countries with historically high multichannel penetration such as Germany and the USA, this term refers to the main mixed-genre national networks. In markets where multichannel penetration has increased over the past five years, these are usually the main commercial terrestrial channels.

Dedicated children's channels: as in the UK, these are channels dedicated to children's programming available on digital terrestrial television, via cable or satellite.

Publicly-funded children's channels: dedicated children's channels operated and funded by publicly-funded broadcasters.

Commercial children's channels: dedicated children's channels deriving revenues from commercial sources such as advertising and subscription.

1.2. Viewing, output and origination trends

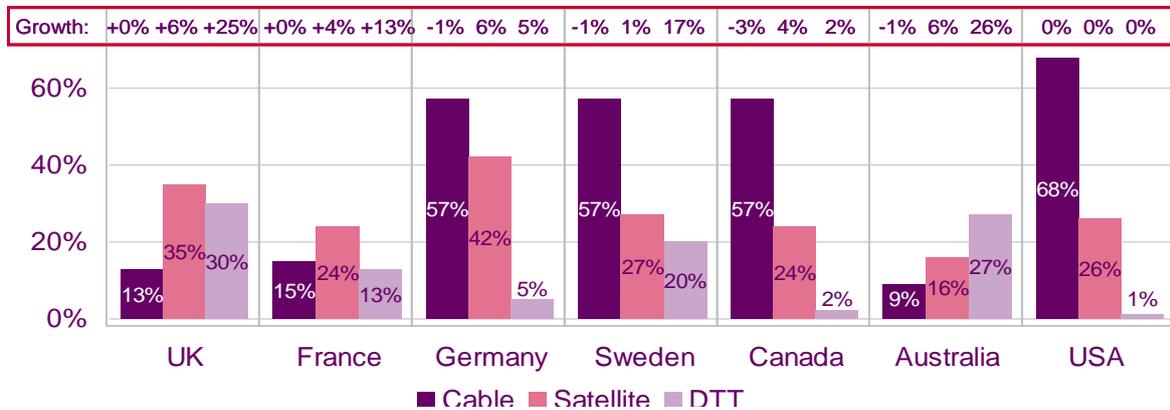
1.2.1. Children's viewing around the world is migrating to dedicated children's channels

Children's television markets internationally have been shaped by two underlying trends: the increase in multichannel penetration and the growing number and popularity of dedicated children's channels.

The countries surveyed in our study fall into two broad groups: those with growing multichannel penetration, and those where multichannel penetration has historically been high. Satellite and digital terrestrial take-up has increased significantly in France and Australia over the past five years, while in Sweden there has been rapid growth in digital terrestrial take-up. Sweden, Germany, Canada and the US have historically had high take-up of multichannel cable services and/or satellite services.

Figure 3: Multichannel penetration by platform – 2006 and growth since 2002

% of households and growth since 2002

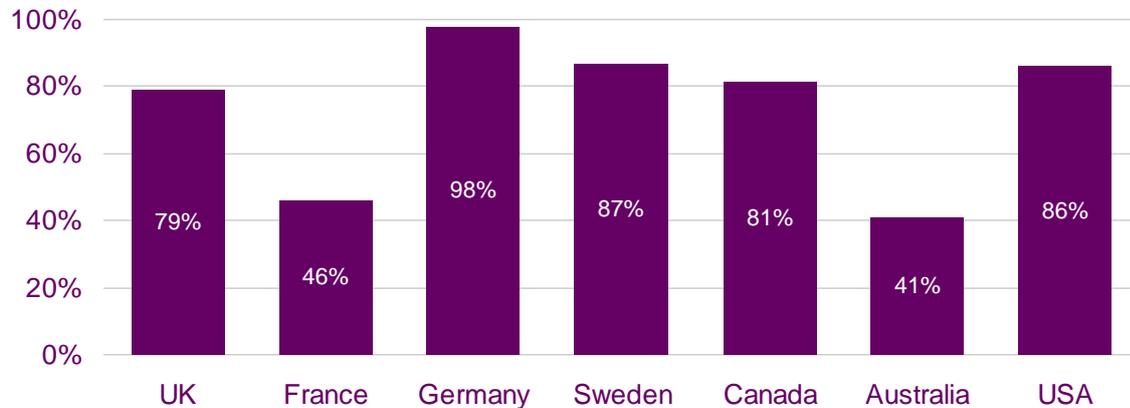


Source: Screen Digest, Ofcom

In 2006, the vast majority of households in Germany, Sweden, Canada and the USA had multichannel television with over 80% take-up. The UK is now approaching these markets, with a 79% take-up rate, while multichannel penetration in France and Australia is lower.

Figure 4: Total multichannel penetration, all households, 2006

% of households



Source: Ofcom, Screen Digest, Médiamétrie – MédiaCabSat, ACMA, ALM/GSDZ

The types of outlets offering children’s content in other countries are similar to those in the UK, consisting of publicly-funded and national commercial mixed-genre providers (referred to as the “main channels” in this section) and dedicated children’s services.

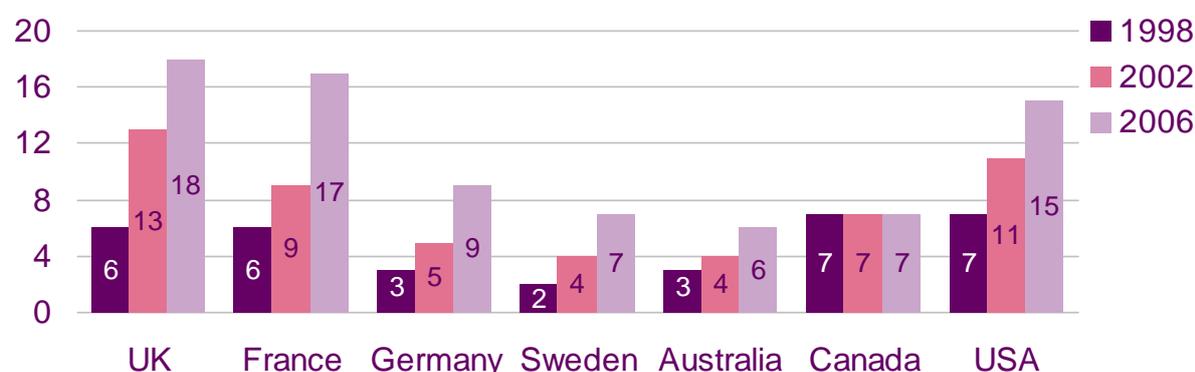
Figure 5: Main television outlets offering children's content

	<u>Channels/ country</u>	<u>UK</u>	<u>France</u>	<u>Germany</u>	<u>Sweden</u>	<u>Australia</u>	<u>Canada</u>	<u>USA</u>
Main channels	Publicly-funded	BBC1, BBC2	France 2, France 3, France 5	ARD, ZDF	SVT1, SVT2	ABC, SBS	CBC, SRC ¹	PBS
	Commercial	ITV, GMTV, Channel 4, Five	TF1, M6, Canal+	RTL, RTL2, SAT1, PRO7	TV3, Kanal5, TV4	Seven, Nine, Ten	CTV, Global, TVA	ABC, NBC, CBS, FOX, The CW, My Network TV
Dedicated children’s channels	Publicly-funded	CBBC, CBeebies	Gulli (JV with Lagardere)	Kinder-Kanal	Barn-kanalen	N/A	N/A	PBS Kids Sprout
	Commercial	16	16	8	6	6	7	12

Source: Ofcom research, Screen Digest

The number of dedicated outlets has increased significantly over the past decade in all countries surveyed (Figure 6). The UK had the highest number of children’s channels, with 18 in 2006, followed by France and the USA.

Figure 6: Growth in the number of dedicated children’s channels



Source: Ofcom for UK data, other country data from Screen Digest – The Business of Children’s Television (3rd edition). Note: data excludes +1 channels.

Global US-based children’s channels operating in the UK were present in most markets surveyed. In addition, several locally-produced commercial children’s channels operated in France and Canada, while Germany’s RTL Group teamed up with Disney to provide the Super RTL channel. Publicly-funded children’s channels were available in Germany and

¹ In addition to CBC and SRC there are several regional educational networks in Canada funded by provinces and offering children’s content (see Annex E, Children’s programming, the international perspective for detail).

Sweden, and in France the public broadcaster France Television entered into a joint venture with the Lagardere group to offer a the dedicated digital terrestrial service Gulli.

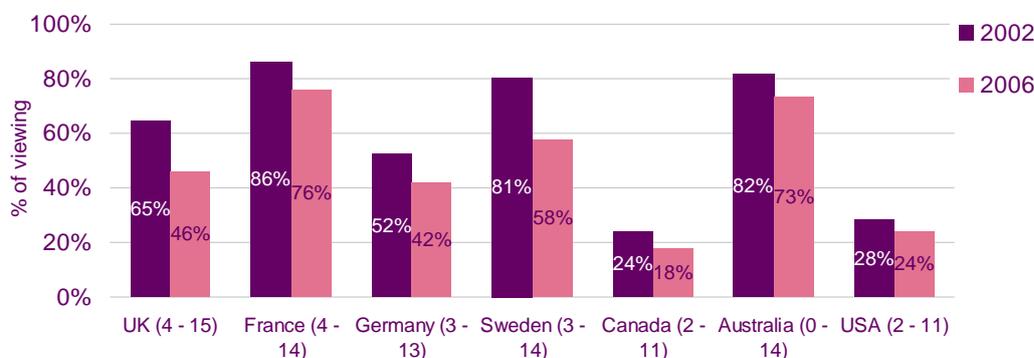
Figure 7: Dedicated channels by country, 2006

	UK	France	Germany	Sweden	Australia	Canada	US
Boomerang	✓	✓	✓	✓	✓		✓
Cartoon Network	✓	✓		✓	✓		✓
Disney Channel	✓	✓	✓	✓	✓		✓
Playhouse Disney	✓	✓	✓	✓	✓		
Toon Disney		✓	✓	✓			✓
Jetix	✓	✓	✓	✓			
Nickelodeon	✓	✓	✓	✓	✓		✓
Nick Jr.	✓				✓		
NickToons	✓						✓
Other commercial	CITV, CN Too, Discover y Kids, Disney Cinema	Canal J, Eurêka!, Filles TV, Planete, Mangas, Piwi, gic, Nick Jr. 2, TFOU, Tiji	Junior TV Super RTL			BBC Kids, Télétoon, Discovery Kids, The Family Channel, Treehouse TV, VRAK TV, YTV,	Discovery Kids, Funimation Channel, HBO Family, Nick 2, Nogging/The N, Nick GAS, Starz Kids & Family, Tickle U
Other publicly-funded	CBBC, CBeebies	Gulli	Kinderkanal	Barn-kanalen			PBS Kids Sprouts

Source: Screen Digest, Ofcom, data excludes + 1 channels

As the number of children's channels grows, viewing is migrating away from the main channels (as listed in Figure 7 above) to dedicated outlets across the markets surveyed. The relative decline was highest in the UK, where children's viewing of the main five terrestrials fell by nearly a third between 2002 and 2006. The highest absolute decline, of 23 percentage points, was in Sweden. The declines were slowest in Canada and the USA – the two markets where dedicated channels have long dominated children's viewing.

Figure 8: Main channels' share of children's viewing

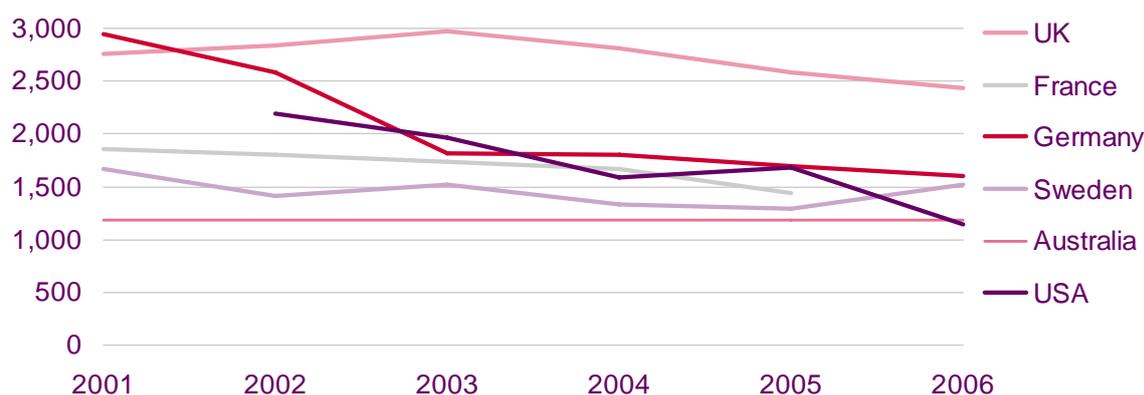


Source: BARB, Eurodata TV/Médiamétrie – Médiamat/AFG – GfK, MMS Mediamätning I Skandinavien AB, CRTC/BBM-Nielsen Media Research, ACMA/OZTAM, Eurodata TV/Nielsen Media Research USA

1.2.2. The UK trend of decline in children's provision by the main commercial channels is echoed in other markets

As viewing migrates to dedicated children's channels, main commercial channels in many markets show and commission fewer children's programmes. In Germany, children's output on the main commercial outlets declined by 46% between 2001 and 2006, to 1,603 hours. In France, the main commercial channels showed 1,441 hours of children's programmes in 2005, down from 1,858 hours in 2001. Similar trends can be seen in Sweden and the USA.

Figure 9: Children's output on the main commercial channels (hours)



Source: Broadcasters, CSA, ALM/GöfaK Medienforschung, ZDF, Kent Asp, ACMA. Note: Output data for France in 2006 were not available at the time of writing, and no data on output in Canada were available. Output hours in Australia reflect children's and pre-school content specified by output quota (the so called C and P programming) on the free-to-air metropolitan channels.

The hours shown in Figure 9 for Australia reflect children's and pre-school content specified by the output quotas for Australia's three commercial free-to-air metropolitan networks (also referred to as C and P content). This output has been stable over the past few years at around 1,180 hours per year, in line with the quota requirements. No historical data exist on the total output of children's programmes in Australia; according to estimates provided to Ofcom by regulator ACMA in addition to required programming the three networks showed around 750 hours of other children's programming in 2006². This non-quota content mainly comprises magazine and cartoon programmes as well as films directed to children.

1.2.3. Children's output on the main national channels in the UK is higher than in most other major markets

The amount of children's programmes on air on the main commercial channels in the UK was above that of other countries, at 2,437 hours in 2006. Combined with hours shown on BBC One and BBC Two, total provision for children on the UK main channels was on a par with that of France and above that of Sweden and Australia. Children's output on the main channels in Germany and the USA, where the vast majority of children's viewing goes to dedicated channels, is also below that of the UK.

² The non-quota programme hours are an estimate based on a sample of children's programmes that are not C or P programmes. The sample is for the week commencing on 3 September 2007.

Figure 10: Children's output on the main channels (hours per year)



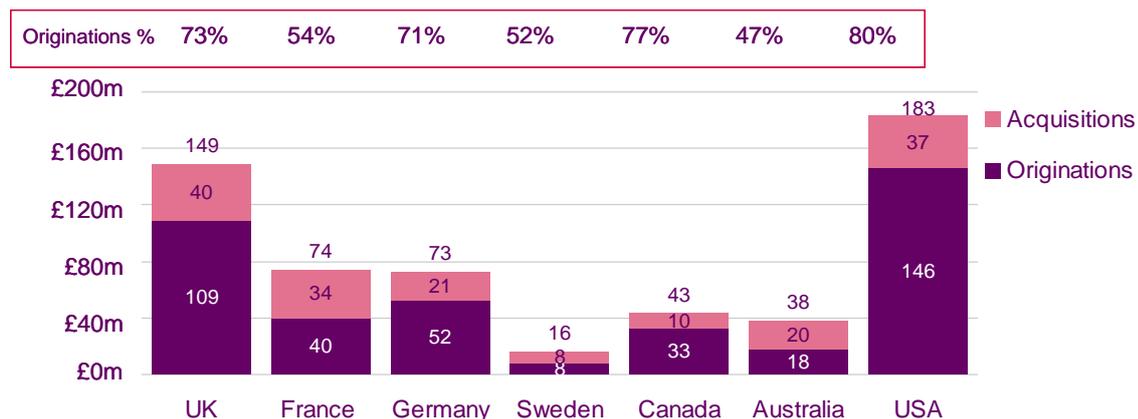
Source: Ofcom, CSA, ALM/GöfaK Medienforschung, ZDF, Kent Asp, ACMA, ABC, Screen Digest, Eurodata TV/Nielsen Media Research USA Note: data for the UK, Germany, Sweden and the USA is for 2006. Data for Australian free-to-air commercial networks is an estimate for 2006 and data for the publicly-funded broadcaster ABC is for financial year 2005/06; data for France is for 2005.

1.2.4. Total UK broadcaster spend on children's television is second to the US

While UK broadcaster spend decreased by 23% between 2002 and 2006, UK broadcasters spend nearly the same amount on children's programmes as their US counterparts. This is despite a much smaller size of the UK market (11.6m children compared to 60.7 million children in the USA). Estimated broadcaster spend in other markets included in the study is considerably lower than the UK.

Within total spend, the share spent on originations by UK broadcasters, at 73% in 2006, was below the equivalent of their Canadian and US counterparts, but higher than that of broadcasters in France, Germany, Sweden and Australia, according to Screen Digest estimates.

Figure 11: Broadcaster spend on children's programming

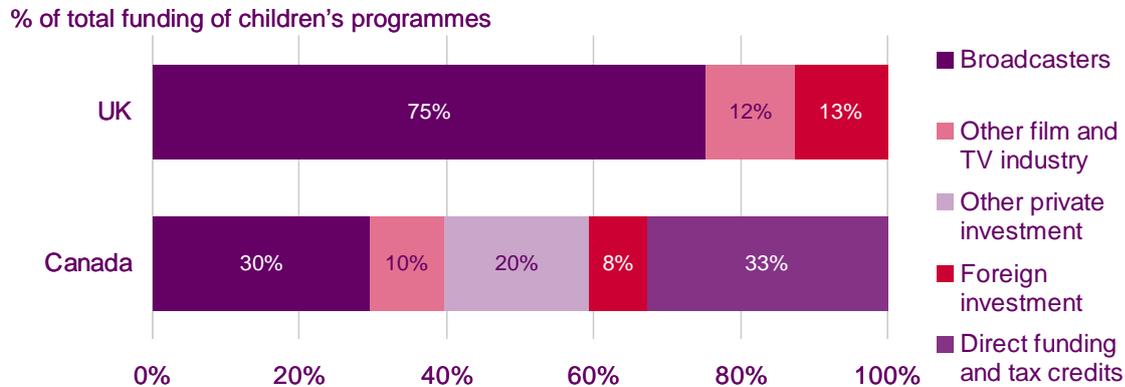


Source: Ofcom, Screen Digest. Note: For comparative purposes, the UK spend of £149m used in this figure excludes the cost of repeats and is different from the £178m reported in Section 3 of this document. Figures for France and Australia are different from data on spend included in Annex E, Children's programming, the international perspective. This is because Screen Digest estimate accounts for other genre on top of animation in France and children's drama in Australia.

While in the UK broadcasters provide the majority of funding for children's programmes (although this can vary by genre) this is not the case in many other markets (Figure 12). For example, in Canada broadcasters accounted for a third of children's programme funding with

the rest made up of a combination of private investment, government funding and foreign investment. In Australia the film and television industry provided around a third of all children's production drama funding in 2005/06 and in France, broadcasters accounted for just over a quarter of funding for animation in 2005.

Figure 12: Total spend on children's programming



Source: Ofcom/broadcaster returns, CFTPA

No data on children's programme funding were available for Germany, Sweden and the USA, but evidence from interviews carried out by Oliver & Ohlbaum Associates for this project suggests that, as in the UK, broadcasters account for the majority of children's programme funding in these markets.

1.2.5. Children's production volumes are cyclical and affected both by local and global market trends

Children's television production volumes are highly cyclical, depending on local demand, funding for children's television, broader shifts in the countries' production sectors and developments in the global children's television market, according to evidence from other countries. While no comparative information exists due to different classifications and reporting requirements, trend data were available for France, Canada and Australia:

- Total spend on animation production in France increased significantly, from £106m in 2005 to £147m in 2006, according to a report released by the national audio-visual body Centre National de la Cinématographie (CNC) in June 2007. According to CNC, the increase is partly due to more investment from the public broadcaster, new CNC subsidies and new tax credit rules for programmes produced in France.
- The sector is currently facing challenges in Canada due to a shift in global demand away from Canadian-produced programmes, according to a recent report by the producers' trade body, CFTPA. Production volume stood at 708 hours in 2005/06, a 14% decline on the previous year.
- Spend on children's drama in Australia varied significantly over the past five years. In 2005/06 139 hours were produced, up 50% from 2004/05 but below the 146 hours produced in 2003/04. Despite the recent increase, the regulator ACMA's ongoing review of children's television production has highlighted the growing difficulty of securing foreign funding as quality requirements increase while international licence fees decrease due to fragmentation in children's viewing.

1.3. Policy approaches to children's television

Three main types of public intervention are employed around the world to support children's television:

- provision by publicly-funded broadcasters (i.e. those deriving the majority of funding from public sources) on both generalist and dedicated children's channels;
- measures to secure provision by commercial broadcasters such as output and investment quotas; and
- support by national or regional governments through direct funding of children's programmes and/or tax benefits for production.

In the remainder of this section we look at how these mechanisms have been applied in the six countries included in the study. This is followed by a summary of approaches in seven other countries to provide a broader overview of policy approaches around the world. .

1.3.1. Provision by publicly-funded broadcasters

Publicly-funded broadcasters play an important role in serving children's audiences, both in terms of output and origination, in all six countries surveyed. Many public broadcasters have an explicit obligation to cater for children embedded in their foundation documents and/or licence obligations.

Figure 13: Public broadcaster's commitments to children's provision

Canada – CBC (*Broadcasting Act, 1991*)

- The Canadian broadcasting system should serve the needs and interests, and reflect the circumstances and aspirations, of Canadian men, women and children.
- Its programming should be varied and comprehensive, providing a balance of information, enlightenment and entertainment for men, women and children of all ages, interests and tastes.

Australia – ABC (*Editorial Policies, 2007*)

- ABC's editorial policies state that children's is part of content through which ABC reflects a wide range of audience interests, beliefs, and perspectives. Editorial policies also outline specific content standards for children's programming.

Germany - ARD & ZDF, Kinderkanal (*ARD-Satzung, ZDF-Satzung, Kinderkanal Philosophie*)

- ARD and ZDF do not have an explicit obligation in relation to children's output, but a commitment to the protection of children.
- KinderKanal is committed to providing advertising-free, target group orientated and varied programming for children up to 13 years of age.

France - France Télévisions (*Statute, September 2006*)

- France Televisions' statute requires the broadcaster to provide diverse programming for young audiences at the times when these audiences are available to watch. Children's content should contribute to fight against discrimination and promote the values of integration and good citizenship. France 5 in particular is required to provide programmes that support the development of children and teenagers, develop their understanding of rights and responsibilities and help them acquire independence and professional capabilities.
- France Televisions must invest particular effort in original production of audio-visual works for the young, with annual volumes decided by the Board of Directors. Revenues from exploitation of French or foreign animation rights must be re-invested in production.

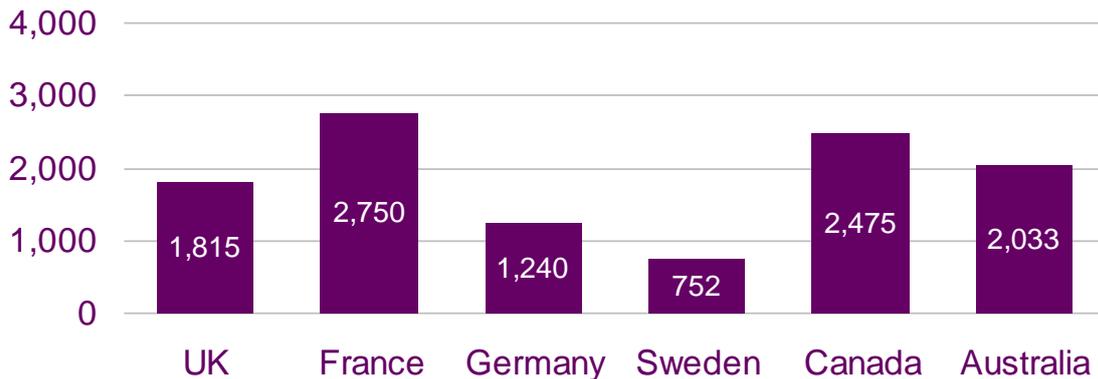
Sweden – SVT (*Service licence 2007 – 2009*)

- SVT has an explicit obligation to provide a diverse range of high quality programmes for children and the young in its broadcasting licence. These programmes should, on children's and young people's terms, convey news and facts as well as cultural and artistic experiences from different parts of Sweden and the world.
- SVT shall have an extensive origination and own production of different genre programmes for children and the young. SVT should in particular develop programmes for the older children and young people. It should specifically cater for the language needs of children and young people belonging to linguistic or ethnic minorities including those using sign language as their first language.

Source: Ofcom research

Publicly-funded broadcasters' main channels show a significant amount of children's programming across all markets (Figure 14 below shows output for the latest year the data were available). In terms of total output, the UK's BBC One and BBC Two channels show fewer programmes than France Televisions' main channels and ABC in Australia. It is also below the combined output of CBS and SRC in Canada – although the fact that SRC is mainly targeted at the French-speaking market should be taken into account. BBC One and BBC Two output in the UK was above that of publicly-funded channels in Sweden and Germany.

Figure 14: Children's output on main publicly-funded channels



Source: Ofcom, CSA, ALM, ALM/GöfaK Medienforschung, GRN, CBS, SRC, ABC, ACMA. Note: Data for France refer to 2005. Data for Australia combines the latest available data for the three commercial networks (2006) and public broadcaster ABC (2005/06). UK, Germany and Sweden refer to 2006. Data on Canada reflects the combined output of CBS and SRC main channels. Data for PBS output in the USA were not available.

Publicly-funded broadcasters provide the majority of new programmes shown on the main national channels in France, Germany and Sweden. As with the BBC in the UK, France Télévisions accounts for 57% of all new children's hours funded by the main national channels in France. The estimated share of first-run hours funded by public service broadcasters is higher in Germany and Sweden, at 84% and 82% respectively. In Australia, where first-release children's quotas apply to commercial networks, originations are split equally between the public broadcaster and the commercial channels.

Public broadcasters in many markets have extended their provision to children via dedicated outlets, with children's channels in Germany (KiKa on all platforms), Sweden (Barnkanalen on digital terrestrial television) and France (Gulli on digital terrestrial television, together with the commercial television group Lagardere). These channels have been a success, despite competition from US-based children's channels.

When publicly-funded digital channels' output is taken into account, the publicly-funded broadcasters in the UK provide the highest amount of children's programming on air with nearly 10,000 hours in 2006, followed by Germany with 6,534 hours and France with 4,805 hours.

Figure 15: Children’s output on publicly-funded channels including dedicated services



Source: Ofcom, CSA, ALM, GöfaK Medienforschung, O&O, GRN, CBS, SRC, ABC, ACMA, Eurodata, Nielsen, Screen Digest. Note: Data for France refer to 2005; Gulli’s hours allocated to France Television based on its proportion of channel ownership (34%). Data for Australia refer to fiscal year 2005/06. UK, Germany and Sweden refer to 2006. Data for PBS output in the USA were not available.

In the USA, PBS – a non-profit public television service with 355 local member stations – is active in children’s provision with its PBS KIDS brand. PBS is available in 99% of US households and is funded by a combination of government grants, donations, sponsorships, income from video sales and royalties. PBS KIDS’ mission is to make ‘a positive impact on the lives of children through curriculum-based entertainment’; it aims to build children’s knowledge, critical thinking, and to encourage interaction as ‘respectful citizens in a diverse society’³.

PBS children’s content forms the basis of PBS Kids Sprout, a commercial joint venture with Comcast, HIT Entertainment and Sesame Workshops and launched in 2005. The service offers a 24-hour digital channel available on cable and satellite platforms, and a video-on-demand (VOD) service online.

1.3.2. Output and investment quotas

Output quotas are applied to maintain children’s provision where it might otherwise not be provided – usually on the main commercial channels. Output quotas are often used in combination with content specifications for particular kind of programming, such as local programmes or programmes targeted at specific audiences.

Production investment quotas are used to direct funding from commercial broadcasters to locally-produced children’s content. Investment obligations can be used in combination with output quotas for mixed-genre channels or applied to dedicated children’s channels.

As in the UK, in other EU markets, origination and independent production quotas specified by the Television without Frontiers (TWF) Directive are applied to encourage investment in EU-originated content and independent production. The Directive requires broadcasters to reserve:

- Where practicable, broadcasters must reserve a majority (i.e. over 50%) of airtime for European works, with at least 10% of transmission time or 10% of programming budget reserved for independent productions.

³ http://www.pbs.org/aboutpbs/aboutpbs_corp_pbskids.html [accessed 7/09/07]

- The quotas exclude time devoted to news, sports, games advertising, teletext and teleshopping services.

The Directive is motivated by the industrial support aim of promoting “markets of sufficient size for television productions in the Member States to recover necessary investments”. It provides the minimum requirements to be applied “where practicable and by appropriate means”; countries may also establish additional rules suited to national cultural and market conditions.

In France broadcasters are required to show 60% of European works and 40% French-language content, including in peak times. Lower quotas (but not below 50% EU origination) may apply to cable and satellite outlets in exchange for investment in French-language content. In Germany, the 50% EU-origination quota applies, and no specific provisions are made in national legislation for the independent production requirement. TWF requirements are implemented in line with the Directive.

The use of output and production quotas for children's television differs among countries included in the analysis (Figure 16). In France, output and investment obligations apply to the largest commercial generalist channel, TF1, while the generalist channel M6 has an investment quota for animation. In addition, cable and satellite services are also required to invest a certain share of turnover in animation. In Sweden, the output requirement for the largest commercial channel T4 was increased in 2006 from five to at least seven hours of children's programming between September and May, of which half should be material in Swedish or another Nordic language. In Germany no specific quotas are set for children's television, although the generic TWF requirement may have some effect on investment by thematic channels.

Among other English-speaking markets, Australia applies output quotas to commercial free-to-air television licensees including quotas for Australian children's drama; there are also minimum spend requirements in place for subscription television drama channels which apply to five of the six existing dedicated children's channels. In Canada, output quotas apply to generalist broadcasters, while most dedicated channels have obligations for particular types of output and/or levels of investment in Canadian programmes. The educational content guideline of three hours per week in the USA aims to ensure that children's educational and informational needs are served.

Figure 16: Summary of output and investment quotas for commercial broadcasters

Country	Children's output and investment obligations
France	<p>TF1 is required to air 1,000 hours per year of programmes for children and youth, of which 50 hours must be documentaries, and to invest 0.6% of turnover in animation. M6, the second largest commercial channel invests 1% of turnover in animation and has a 50% EU origination quota for animation.</p> <p>Since 2003, cable and satellite channels are required to invest in French animation (in 2006, 10% of turnover for Disney, Toon Disney, TiJi and Eureka; 13% for Canal J and Tfou, 14% for Jetix and 16% for Teletoon).</p>
Germany	No children's content quotas
Sweden	TV4 is required to air seven hours of children's programmes during September-May, of which half should be programmes in Nordic languages.
Australia	<p>Requirement on commercial free-to-air television licensees to broadcast at least 390 hours of children's programmes a year, of which 260 hours must be children's (C) programmes and 130 hours must be pre-school (P) programmes. Programmes other than Australian children's drama should not be repeated more than three times in a five-year period.</p> <p>Half of the 260 hour quota of C programmes must be first-release Australian content, and all P programmes must be Australian. Licensees must broadcast at least 96 hours of first release Australian children's drama over a three-year period, with a minimum of 25 hours in each year. At least eight hours per year of repeat Australian C drama is also required.</p> <p>C programmes must be aired during C periods to count towards the quota. C periods are 7-8am and 4-8.30pm Monday to Friday; and 7am-8.30pm Saturday, Sunday and school holidays. P programmes must be aired between 7am and 8.30pm on weekdays to count toward the quota.</p> <p>C and P programmes must be child-specific, entertaining, well-produced; enhance children's understanding and experience, and be appropriate for Australian children.</p> <p>Requirement for subscription drama channels (i.e. channels dedicating more than 50% of airtime to drama programmes) including children's drama channels to spend at least 10% of their programme expenditure on new eligible (Australian and New Zealand) drama. This is applicable to five of the six existing subscription children's channels.</p>
Canada	<p>A number of detailed requirements for children's output, Canadian origination and investment in children's programmes applicable to commercial channels.</p> <p>Commercial network CTV is required to broadcast 2.5 hours per week of children's programmes, while CanWest is required to cater for children's (no hours quota). Most dedicated children's services have output and investment obligations in relation to Canadian programming (see online research annex E, <i>Children's programming, the international perspective</i>).</p>
USA	<p>A guideline for all television stations to broadcast three hours per week of core educational programmes, which is programming that furthers the positive development of children under 16 years of age and services the child's intellectual/cognitive or social/emotional needs. Programmes should be at least 30 minutes long and be aired between 7 am and 10 pm.</p>

1.3.3. Direct government support

In addition to provision by publicly-funded broadcasters and measures to secure investment by commercial channels, direct support from national or regional government sources is applied in several of the countries included in our study. There are two types of support in this category: direct funds channelled into production of children's programmes, and tax benefits for audio-visual production.

Direct funding

Direct funding is usually distributed by public bodies set up for this purpose, offering support which is typically targeted at particular genres or types of children's content. Funds are

distributed either as automatic allocations based on previous broadcaster and/or producer investment in children's content, or on a contested basis. Among the countries surveyed in this study, substantial public funding is directed to children's production in France, Australia and Canada:

- In France, the national audio-visual body CNC funds animation projects (equivalent to £26m in 2006). Over 70% of this is distributed via automatic contributions allocated to broadcasters based on their past investment in children's programmes. The remainder is split between selective funding (distributed on a contested basis to smaller and/or new producers) and advance payments for reinvestment for producers in receipt of automatic funding.
- In Australia, support for Australian children's drama is available from the Film Finance Corporation which invested the equivalent of £10m in children's programmes in 2005/06. Funding is also available from the Australian State agencies, such as the Pacific Film and Television Commission (PFTC) in Queensland, with the aim of supporting local producers and attracting interstate productions. The levels of investment by state agencies vary from year to year.
- In Canada, the Canadian Television Fund contributed the equivalent of £21m to Canadian children's programmes in 2005/06. The CTF is a public/private partnership created to provide support provision of high quality, distinctly Canadian programming in under-represented genres, particularly in peak viewing times. In addition, a number of other bodies, usually funded through private sources such as cable providers, broadcasters and donations, offer support for children's programming. Shaw Rocket Fund is the largest, with the equivalent of a £4.8m contribution to Canadian children's programmes in 2006.

Tax benefits

Tax benefits are an industrial support measure aimed at encouraging private investment in local production and/or attracting foreign funds. Among the countries analysed, France, Canada and Australia had tax benefit schemes in place to support television production:

- Two schemes exist in France: SOFICAs are investment funds allowing tax liability write-offs for up to 50% of production budget and the Credit d'import scheme allows up to 20% tax deductions on production expenditure in France. In 2005, the SOFICA contribution to production was £21.6m (€31.6m), representing on average 6.9 per cent of budgets. However, most of this went into film rather than television investment.
- Several types of tax credit are available in Canada. The Canadian Production Tax Credit (CPTC), implemented in 1995 to support development of the Canadian audio-visual industry requires a minimum level of Canadian creative and/or managerial control of the project and can provide 25% of the qualified labour expenditure. The Production Services Tax Credit (PSTC) can cover up to 16% of Canadian labour expenditure and is available to productions that have not claimed the CPTC. Provincial tax credits can add a further sum of 25% of budget, depending on the amount of labour costs in the relevant province. In 2005/06 the value of national tax credit that went into children's television was £14m, while provincial tax credits added a further £23m, according to the Canadian Television and Film Producers Association.
- In Australia, private investment in production is encouraged through a system of tax benefits, which is currently undergoing a change. Until 1 July 2007, income tax

deductions of up to 100% were available on investment in qualified Australian projects. In 2005/06, tax benefits schemes attracted an estimated £3m of funding for children’s projects. From 1 July 2007, the level of support has been increased, and the tax break system replaced with rebates to producers, this is seen by the government as a more efficient support mechanism. The Producer Rebate scheme offers up to 20% rebate on spend on qualifying Australian television projects. The location rebate, devised to increase Australia’s attractiveness as a location for large offshore productions, has been increased from 12.5% to 15% of qualifying Australian spend.

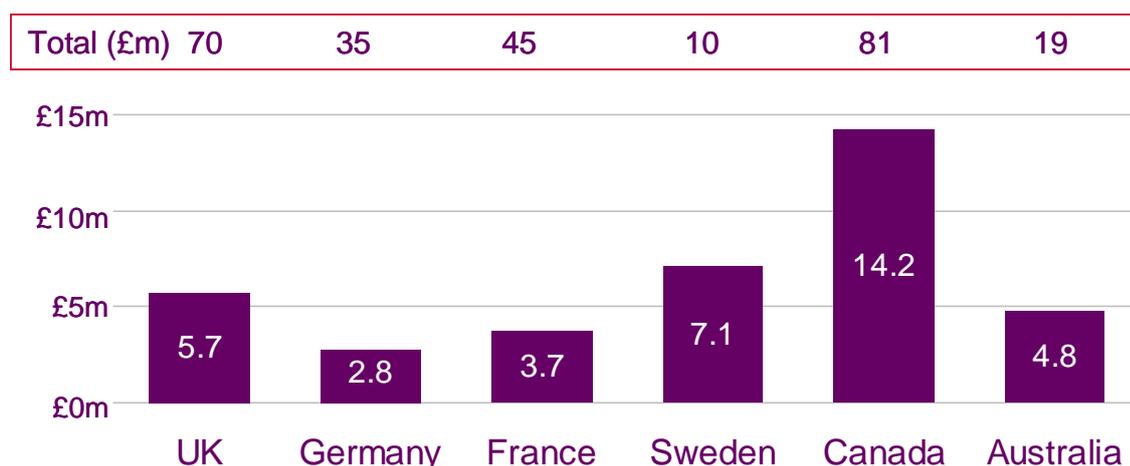
- In Germany and Sweden no national funding schemes exist (although occasional support is available, the amounts are relatively low), while in the US funding is limited to support for children’s educational projects provided by the Department of Education. No tax credits for children’s television production are available in these markets.

1.3.4. The UK is third among countries surveyed in public spend on children’s television per child

Figure 17 below shows estimated levels of public funding for children’s programming in the latest year for which data are available, taking account of children’s programming spend by publicly-funded broadcasters. Canada had the highest estimated public spend (£81m) followed by the UK with £70m spent by the BBC and S4C on new children’s programmes in 2006. France is third among the countries surveyed, with an estimated £45m of public money invested in new content for children.

While total funding is indicative of the level of support, funding per child is a better comparative measure as it takes account of the market size. Canada is ahead of other markets with £14.20 per child, followed by Sweden and the UK, both of which have public broadcaster-dominated funding models.

Figure 17: Public funding of children’s television production, per child and total



Source: O&O analysis, BBC and S4C. Note: figures include estimates of direct funding, value of tax breaks and publicly-funded broadcaster spend, and should be used as indicative. Please see Annex A3 for methodology detail behind the estimates. Reference periods are for UK and France - 2006, for Canada and Australia – 2005/06, for Germany and Sweden – 2005.

1.3.5. All countries surveyed regulate advertising to children

All countries surveyed have rules in place regulating the kind of content children can watch; the minimum degree of child protection in Europe is set out in the Television Without Frontiers Directive which restricts broadcasting of programmes which may impair the development of minors. In all countries surveyed there are regulations in place ensuring a basic level of child protection (e.g. prohibition of alcohol advertising, violent images and pornography) and defining what content is appropriate for specific age ranges.

Limitations exist around advertising to children across all the countries surveyed. In the EU, again, the basic requirements set out in the TVWF Directive aim to ensure that television advertising does not cause detriment to minors, or exploit their inexperience or the special trust minors place in certain people like their parents or teachers, or show minors in dangerous situations. Interruption of children's programmes by advertising is only permitted for programmes of at least 30-minute scheduled duration. The Directive is currently being revised. The new rules, likely to come into effect in 2009, will require programmes to be longer than 30 minutes before they can be interrupted by advertising.

These rules are in place in France and Germany (which also prohibits programme interruption by advertising); while in Sweden advertising to children is not allowed. Canada, USA and Australia all have limitations on the amount of advertising during or around children's programmes.

Figure 18: Regulation of advertising directed at children

UK	TWF rules apply; restrictions on advertising of food and drink products that are high in fat, salt and sugar (HFSS) around programmes of particular appeal to children
France	TWF rules apply; mandatory display of nutritional warnings on all advertising of processed foods and sugary drinks.
Germany	TWF rules apply; children's programmes may not be interrupted by advertising or teleshopping.
Sweden	Advertising directed at children under 12 years of age is not permitted; no advertisement can be shown before, during or after children's programmes.
Australia	No advertising during pre-school (P) programmes Advertising during children's programmes (C) periods, where C programmes are shown is restricted to five minutes per half hour; 13 minutes per hour for Australian children's drama
Canada	Maximum of four minutes of advertising per 30 minutes of children's material Advertising aimed at children under 13 years of age is prohibited in Quebec
USA	Advertising during programmes targeted at an audience of children 12 years and younger is limited to 12 minutes per hour on weekdays and 10.5 minutes per hour on weekends.

1.4. Approaches to children's television in other countries

To place the UK in broader international context, we have also looked at the approaches adopted in smaller and non-English speaking markets around the world - Ireland, Italy, Spain, the Netherlands, Denmark, Norway and Japan. In most of these markets, a smaller range of public interventions is used compared to the markets surveyed in-depth.

Netherlands, Denmark and Norway

Public intervention in children's television is limited to provision by publicly-funded broadcasters. There are no dedicated children's channels funded by public broadcasters in these markets, although in the Netherlands public broadcasters offer a branded children's slot Zapp/Zappelin on one of their channels.

There are no output or production quotas for commercial broadcasters, or substantial government funding for children's television or tax benefits for television producers. In Denmark and Norway, the Nordic Film and TV Fund offers support for programme development and production, while in the Netherlands the Dutch Film Fund has funded animation projects. Some regional funding is also available in these markets; however, the total amount of public funding is relatively low.

Japan

The publicly-funded broadcaster NHK has a commitment to producing children's programming, with particular emphasis on educational programmes. In addition, the National Association of Broadcasters has agreed on a voluntary quota for all free-to-air broadcasters to show three hours of children's television a week.

Ireland

RTÉ – a public service broadcaster which derives around half of its funding from advertising – has made a voluntary commitment to broadcast a certain number of hours for children and young people on its two channels (650 hours in 2006). The majority of this quota is fulfilled on RTE Two. TG4, the Irish-language public broadcaster⁴, provides a daily schedule of children's programmes, although it does not have a formal quota in place. There are no requirements for output or investment in children's television for commercial broadcasters.

Irish producers and broadcasters have access to a range of public funding schemes. The Irish Film Board funded €2.3m (approximately £1.5m) of children's and animation projects in 2006/07. In addition, the 'Sound and Vision' scheme was set up in 2006 to support the production of new television and radio programmes in the areas of Irish culture, heritage and experience and adult literacy. The scheme is funded with 5% of the television licence fee. Funding is allocated based on defined criteria such as relevance to Irish culture, and can cover up to 95% of the production budget for the programme. At the time of writing, six children's projects were awarded funding, with a total contribution of €4.06m (around £2.7m), which is around one-fifth of the total amount awarded through the grant.

Ireland also has significant tax breaks; again, an industrial measure aimed at supporting local production and attracting international investment. The 'Section 481' tax incentive offers funding of up to 20% of qualifying expenditure for film, television drama and animation.

Italy

Italy's public service broadcaster, RAI, is funded by a licence fee and by commercial revenue. RAI's current service licence, which runs from 2007 to 2009, requires it to dedicate at least 10% of its annual programming schedule between 7 am and 10.30 pm to children's programmes. RAI's service contract also includes a specific provision for investment in animation: the broadcaster is required to invest 15% of its turnover in Italian and European content, of which 5% must be spent on "animation and/or animation films produced specifically for children.

RAI also funds two dedicated children's channels. The broadcaster's original service, RAISat Ragazzi, launched in 1997, was split into pre-school channel Yoyo, and teenage-focused Smash, in November 2006. There is no targeted funding for children's television programmes or tax breaks for television production in Italy.

⁴ TG4 operated under the statutory umbrella of RTÉ since 1996 until becoming an independent statutory entity on 1 April 2007.

Spain

Televisión Española (TVE), the nation public broadcaster in Spain, derives its revenue both from government funds and advertising. TVE does not have a specific obligation for children's output, but has a commitment to invest in 12 Spanish animation series. Regional broadcasters also play a role in originating new programmes – for example, Televisió de Catalunya (TV3) co-produces three animation series a year with local producers. TVE funds a digital children's channel Clan TVE, while TV3 offers a children's channel in Catalonia called Club Super 3. While no national level funding or tax breaks are available for children's television producers, there is some regional support. The Catalan Institute of Cultural Industries (ICIC) allocates subsidies for development and production of animation for which any producer established in the region can apply for. In 2005, ICIC awarded €0.5m (£0.3m). Other regions also offer support, notably the Basque country, Galicia, Andalucia and Valencia (no detailed figures are reported).

Summary

While in the key countries surveyed a clear distinction could be made between publicly-funded broadcasters and national commercial networks; this distinction doesn't apply in all countries. Many countries use a mixed PSB model, where a channel may derive revenue both from public funds and from advertising. In this overview we have referred to broadcasters who derive the majority of their funding from public sources as "publicly-funded broadcasters". These include RAI in Italy, RTÉ in Ireland and Televisión Española and Televisió de Catalunya in Spain. These broadcasters do not operate in the same way as services that are fully funded by public money, and may therefore experience some of the same pressures as the commercial networks with regard to their output and production investment requirements.

Figure 19: Other countries' approaches to children's television - summary

	Ireland	Japan	Italy	Spain	Netherlands	Denmark	Norway
Provision by publicly-funded broadcasters	Yes - RTE	Yes – NHK	Yes – RAI	Yes – TVE and regional broadcasters	Yes – 2nd and 3rd public TV channels	Yes – TV2 Denmark	Yes - NRK
Publicly-funded children's channels	No	No	Two channels	Two channels	No, but a children's slot funded by public broadcasters	No	No
Children's output quota for commercial channels	No	Voluntary quota of 3 hours/week for all FTAs	No	No	No	No	No
Children's production quotas for commercial channels	No	No	No	No	No	No	No
Public funding via direct funding or tax breaks	Substantial	Small	Small	Regional support	Small	Some regional support	Some regional support

1.5. Summary and conclusions

1.5.1. The UK and global market trends

Our data show that the trends in children's television markets in other countries are broadly similar to those affecting the UK, with children's viewing migrating away from the main national channels to dedicated outlets while children's output on main national channels in many markets is in decline. The growth in dedicated children's channels and increases in multichannel penetration are the two key factors behind these changes.

While detailed market data on children's television sectors are hard to come by, the comparable statistics available to us suggest that the overall volume of provision in the UK is on par or above that of other markets. The UK has a relatively high level of output on its main national channels and the highest number of dedicated children's channels among the six markets surveyed. Total broadcaster spend on children's programmes in the UK was below only that of the USA in 2006, and significantly above that of the other countries surveyed.

However, the data also indicate in the UK children's television sector is undergoing change at a faster pace than some other markets. The relative decline in the share of children's viewing of the main national channels in the UK, from 65% to 46% was the highest among the key countries examined in this report. This is likely to be a result of the three-fold increase in the number of dedicated children's channels between 1998 and 2006 – the highest increase among all the markets surveyed – and the fast growth in multichannel take up (from 26% of all households in 1998 to 79% in 2006).

1.5.2. Policy approaches

Our research shows that a variety of mechanisms to support provision of children's television has been adopted around the world, as summarised in Figure 20 below. While approaches vary by country, three groups of markets can be identified. France, Australia and Canada employ a broad range of interventions to support domestic programme production –all three have output and production quotas in place alongside substantial direct funding and tax breaks supporting local production in addition to provision by publicly-funded broadcasters.

The USA, Ireland, Sweden and Spain use a combination of interventions, each underlined by specific policy goals. Guidelines for the amount of educational and informational programming for children are in place in the USA while in Sweden the largest commercial channel has an hours quota for children's output. In Ireland, direct funding and tax breaks are available to producers, while regional funding is available to producers in Spain.

Publicly-funded broadcasters are the main intervention mechanism supporting the provision of children's programming in Germany, the Netherlands, Denmark and Norway. In all these markets some regional funding is available to children's television producers, but the overall amounts are relatively low. Italy can also be included in this category although the mixed public-private model of funding for its public broadcaster RAI means that output and investment obligations for RAI in Italy fall in between public provision requirements and the typical requirements for commercial channels.

Figure 20: Summary of policy interventions in children's television

	UK	FRA	GER	SWE	USA	AUS	CAN	IRE	JAP	ITA	SPA	NED	DEN	NOR
Provision by public broadcasters	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Publicly-funded children's channels	✓	✓	✓	✓	✓					✓	✓			
Output quota		✓		✓	✓	✓	✓		✓					
Production quotas		✓				✓	✓							
Substantial direct funding for children's		✓				✓	✓	✓			✓			
Tax breaks		✓				✓	✓	✓						

Note: the three-hour/week educational children's guideline in the USA is not a formal requirement.

1.5.3. Conclusions

The overview of approaches to children's television in other countries highlights the fact that the motivation behind policy interventions varies substantially depending on the regulatory goals and historical policy traditions, the local television environment and broader media landscape. While most interventions support the provision of locally-produced children's programmes, the underlying rationales may be different, for example:

- the industrial support rationale (e.g. funding for the animation sector in France and tax benefits designed to attract foreign investment in Australia);
- cultural goals (e.g. the Canadian broadcasting system has a strong element of promoting home-grown content overall, not just in children's television); and
- educational goals (e.g. the core educational output guidelines in the US supports educational provision in addition to market-led US-based children's production).

It is difficult to compare policy approaches in terms of how successful an approach has been as unique mechanisms have been developed by countries that fit local circumstances and that seek particular outcomes. However, we can identify some broad indicators for policy options relevant for the UK:

Output quotas for commercial broadcasters have long been employed in some other markets to support the level of provision to children which might otherwise not be provided. For example, when enacting the educational provision requirement in the USA in 1990, Congress determined that "market forces alone had not produced an adequate amount of children's educational and informational programming on commercial television and that government action was needed to increase the availability of such programming".⁵ Output quotas are being reviewed by policy-makers in the context of the changing market environment. In Sweden, where children's output on the main commercial channels has been declining over the past decade, the output quota set for the commercial channel TV4 was increased from 2006 from five hours per week between September and May to seven hours per week. In the USA, the FCC has amended the educational output guidelines to apply to the broadcasters' digital streams from 2007. As part of its ongoing review of its

⁵ FCC: http://www.fcc.gov/Bureaus/Mass_Media/Factsheets/kidstv.txt [accessed 7/09/07]

Children's Television Standards, the Australian regulator, ACMA, is examining whether current quota requirements are set at an appropriate level.⁶

Plurality of provision (i.e. that there are several alternative providers of children's programmes competing with each other and offering differing perspectives to the audience). While the argument itself is not always explicitly stated, the application of quotas for commercial broadcasters alongside commitments by publicly-funded broadcasters can mean that in practice these achieve the plurality of provision in markets such as France, Sweden and Canada.

Plurality of voices and **diversity of views** are also considerations for policy-makers in other markets. For example, France Televisions is required to provide "diverse programming" to its child audiences, while SVT is also obliged to convey 'experiences from different parts of Sweden and the world' and to serve the interests, and reflect the views of, minority language groups.

Funding for production, either directly allocated by government agencies or via tax breaks, is employed in many markets as a way of supporting the production of programmes which reflect national and/or local perspectives and as an industrial support measure for the industry. Our data suggest that while these measures do not necessarily increase the total amount of public funds in the sector (e.g. relatively high spend by public broadcasters in the UK means that the total public funding level is above that of many other markets), it does have implications for the range of sources available to producers. For example, while in the UK three-quarters of spend on children's programmes originates with broadcasters (although this can vary by genre). Children's television producers may be less exposed to changes in the level of broadcaster spend in markets like Canada, where only a third of funding comes from broadcasters.

In discussions with stakeholders through undertaking this research, many raised international policy approaches as alternative approaches to regulation that could be taken in the UK and accordingly, these findings are useful for informing further debate.

⁶ http://www.acma.gov.au/webwr/assets/main/lib310132/cts_review_issues_paper.pdf [accessed 7/09/07]

France

2.1. Summary

- A rapid increase in digital penetration has been the defining feature of the French television landscape over the past few years, with 13% of homes taking up digital TV between 2002 and 2006. Total multichannel penetration stood at 46% in June 2007.
- All main mixed-genre channels show programmes for children; in 2005 these channels broadcast an average of 81 hours per week of children's programmes, down from 86 hours a week in 2002.
- The number of dedicated children's channels has grown rapidly, from six in 1998 to 17 in 2006. As a result, a quarter of children's viewing now goes to channels other than the main mixed-genre channels, up from 14% in 2002.
- According to Screen Digest estimates, broadcasters in France spent £74m on new children's programmes in 2006, of which 54% was accounted for by broadcaster originations.
- The majority of detailed data on children's programme origination in France focus on animation. Total spending on animation production in France has increased significantly, from £106m in 2005 to £147m in 2006, partly as a result of increased investment from the public broadcaster, new subsidies and new tax credit rules to stimulate local production.
- Broadcaster investment accounts for a quarter of all animation funding. Foreign co-productions and pre-sales contribute a further 26%; producers and pre-sales in France contribute 25%. Public grants account for a fifth of animation production funding, with other sources accounting for the remaining 5%.
- Public broadcasters accounted for half of all broadcaster investment; commercial networks contributed 38%, and the rest was funded by dedicated channels. Commercial broadcaster investment in France is supported by investment obligations in place for the main commercial channels and dedicated children's channels.

2.2. Market context

France has experienced a rapid increase in digital penetration, with 13% of homes taking up digital TV between 2002 and 2006. Total multichannel penetration stood at 46% of households in June 2007, according to Mediametrie.

France's five main terrestrial channels account for 83% of all television viewing in France. TF1, previously a public channel but privatised in 1987, is the largest, with 32% viewing share among all individuals in 2006, largely stable over the past five years. M6, the second commercial mixed-genre channel, accounted for 13% of viewing in 2006. In addition, a premium service, Canal+, also operates on terrestrial frequencies, with a 3% viewing share.

Public broadcaster France Televisions' three services – France 2, France 3 (a network of regional channels) and France 5 (concentrating on education, employment and health) - account for 39% of viewing, down by 2% since 2002. France Televisions' DTT channel, France 4, focuses on arts and music.

Figure 21: Market context - France

2006 platform penetration (change since 2002)	Main publicly-funded channels (2006 share of viewing, all individuals)	Main commercial channels (2006 share of viewing, all individuals)	Dedicated children's channels
Cable 15% (0%)	France 2 (19%)	TF1 (32%)	Gulli, Boomerang, Canal J, Cartoon Network, Disney Channel, Eurêka!, Filles TV, Jetix, Ma Planete, Mangas, Nickelodeon, Piwi, Playhouse Disney, Télétoon, TFOU, Tiji, Toon Disney
Satellite 24% (+4%)	France 3 (15%)	Canal + (3%)	
DTT 13% (+13%)	France 5 (5%)	M6 (13%)	
IPTV 5% (+5%)			

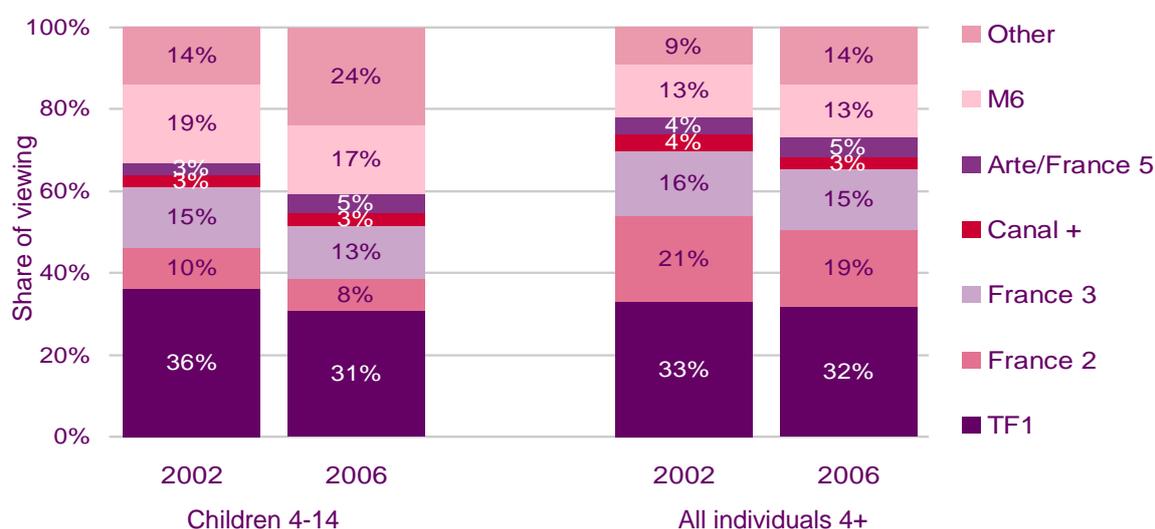
Source: Ofcom research, CSA, Screen Digest, Eurodata TV/Médiamétrie – Médiamat

2.3. Children's viewing

As multichannel penetration increases, children's viewing is migrating away from the five main mixed-genre channels, as shown in Figure 22 below. The erosion of the main channels' audiences has been much faster among children than among adults. Nearly a quarter of 4-14 year olds' viewing went to channels other than the main terrestrials in 2006 (up from 14% in 2002), compared to only 14% for all individuals (up from 9% in 2002).

Around 20% of all children's viewing on the main channels is to children's genre programmes, according to Médiamétrie data. This share has stayed stable over the past five years.

Figure 22: Channel viewing shares among children and all individuals

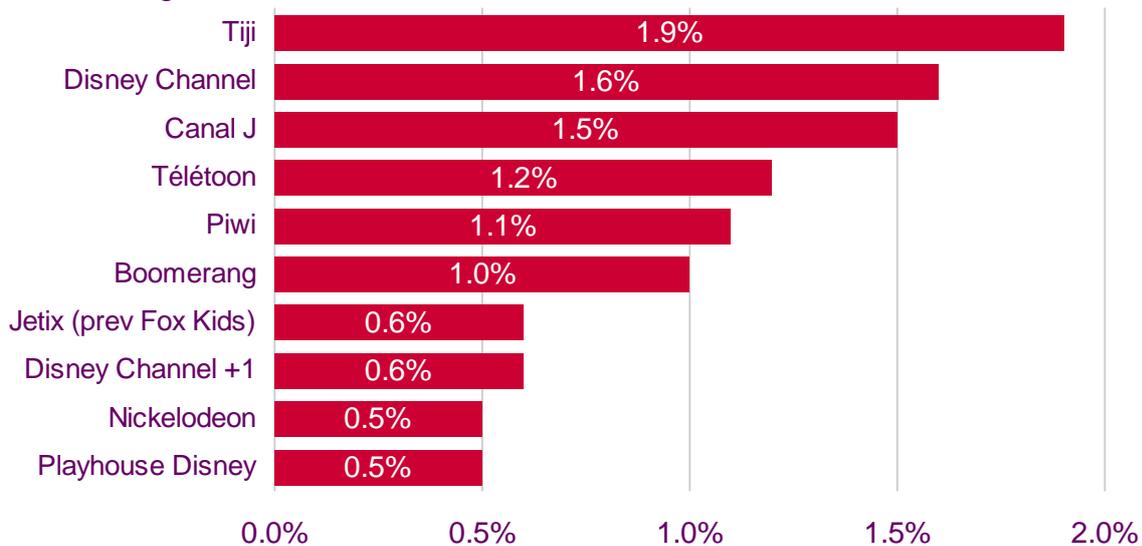


Source: Eurodata TV/Médiamétrie – Médiamat

Among dedicated children's cable and satellite channels, Tiji, launched by the Lagardere group in December 2000, has the largest audience share, at 1.9% (Figure 23). Disney Channel was second, with 1.6%, followed by Canal J (also controlled by Lagardere) with 1.5%.

Figure 23: Top ten cable and satellite dedicated children's channels by audience share, September 2006 - February 2007

% of viewing in cab/sat households

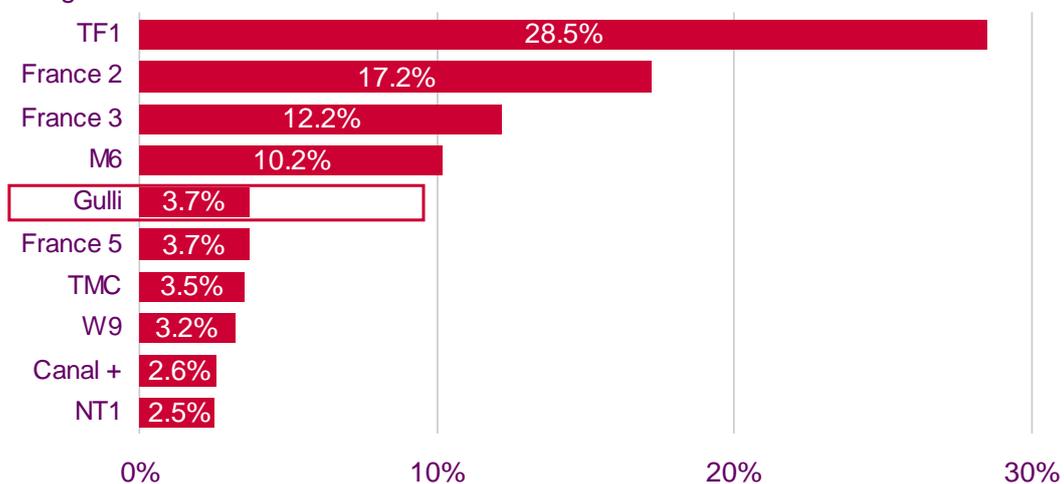


Source: Médiamétrie/MédiaCabSat

Gulli, a joint venture between France Televisions (34%) and Lagardere (66%), has a 3.7% audience share among DTT households – the highest of all DTT-only channels. The channel was launched in November 2005 and is available to over 45% of French households via DTT, cable, satellite and broadband.

Figure 24: Top ten DTT channels by audience share, January - March 2007

% of viewing in DTT households



Source: Médiamétrie /MédiaCabSat

2.4. Output of children's programmes

Children's output on the main commercial channels has been in decline over the past five years. Children's hours on TF1 in 2005 were just above the quota of 1,000 hours, at 1,016 hours, down by 14% since 2001. Output on M6 fell by over a quarter, to 425 hours in 2006.

Hours dedicated to children on the publicly-funded channels France 2 and France 3 also declined, by 18% and 11% respectively. However, the increase, of 47% in children's hours on France 5 meant that, together, publicly-funded channel children's provision grew by 5%.

Figure 25: Children's output on the main terrestrial channels in France



Source: Broadcaster reports to CSA

2.5. Origination

According to Screen Digest estimates, broadcasters in France spent £74m on new children's programmes in 2006, of which 54% was accounted for by broadcaster originations.

The majority of detailed data on children's programme origination in France focus on animation. Commercial broadcasters' investment in animation programming has been stable over the past few years. Adjusting from cyclical changes from year to year, French broadcasters have funded around 300 hours of animation per year since 2001.

Public broadcasters have accounted for just under half (46%) of total broadcasters' animation investment over the past six years. France 3 is the biggest spender, with an average £15m annual animation investment over the past three years. France 2 and France 5 both spend around £4m a year. Although France Televisions does not have a set investment quota for animation, it does have an agreement on production levels with the animation producers' body, SPFA.

Figure 26: Broadcaster investment in new animation programmes



Source: CNC, O&O analysis

National commercial channels have, on average, contributed over 40% of all broadcasters' investment since 2001. Funding by commercial broadcasters is supported by the animation investment quotas contained in most broadcaster licences. TF1 is required to invest 0.6% of its turnover in animation, while M6's requirement is to invest 1% of its turnover and a 50% EU origination quota for animation.

Dedicated channels' contributions are smaller, at around 14% of all broadcasters' spend. Since 2003, cable and satellite channels have also been required to invest in French animation. In 2006, the quotas amounted to 10% of turnover for Disney, Toon Disney, TiJi and Eureka; 13% for Canal J and Tfou, 14% for Jetix and 16% for Teletoon.

Total spend on animation production in France has varied significantly over the past six years, ranging from £88m in 2004 to £147m in 2006, according to a report released by the national audio-visual body Centre National de la Cinématographie (CNC) in June 2007. According to CNC, the 2006 increase in funding, of 39%, is partly a result of higher investment from the public broadcaster, new CNC subsidies and new tax credit rules for programmes produced in France.

While broadcasters are the largest single source of animation funding (at 26% in 2006), the majority of production funding comes from a other sources (Figure 27). In 2006, foreign pre-sales and co-productions accounted for a quarter of total funding, while French producers and pre-sales in France together contributed for a further 25% of funding. The contribution from the Compte de Soutien a l'Industrie des Programmes Audiovisuels (COSIP), a funding scheme managed by the Centre National de la Cinematographie (CNC) has grown over the years to account for nearly a fifth (18%) of animation funding in 2006.

Figure 27: Sources of funding for animation programmes



Source: CNC

2.5 Public intervention in children's TV

Provision by the publicly-funded broadcaster

France's public broadcaster, France Televisions, has a strong commitment to serving children's audiences. Its statutes⁷ require it to provide diverse programming for young audiences at times when these audiences are available to watch. Children's content should

⁷ http://www.francetelevisions.fr/recup_data/recup_2.php?nav_url=3_0&lg=fr&mode=html [accessed 7/09/07]

contribute to fight against discrimination and promote the values of integration and citizenship. France 5 in particular is required to provide programmes that support the development of children and teenagers, develop their understanding of rights and responsibilities and help them acquire independence and professional capabilities.

France Televisions must invest particular effort in original production of audio-visual works for the young; revenues from exploitation of French or foreign animation rights must be re-invested in production.

France Televisions aired 53 hours per week of children's programming on its three terrestrial channels in 2006, and invested an equivalent of £19m in new animation programmes. It also invested an equivalent of £0.3m in the dedicated children's channel Gulli, a joint venture with commercial group Lagardere.

Output and investment requirements

France's two main commercial channels have obligations in relation to children's content. TF1 is required to broadcast 1,000 hours/year of programmes for children and youth, of which 50 hours should be documentaries. The channels is also required to invest 0.6% of its turnover in animation. M6 is obliged to cater for children's audiences, with a 50% EU origination requirement for its animation output. The channel is also required to invest 1% of its turnover in animation.

In addition to any specific genre requirements, origination quotas deriving from the Television Without Frontiers directive also apply. Requirements in France are stricter than the 'majority of European works' rule set out by the Directive. French broadcasters must air 60% European and 40% French-speaking output quotas across the schedule; reduced (but not below 50%) quotas can apply for cable and satellite channels in return for investment in French audio-visual production.

Since 2003 cable and satellite channels are required to invest in French animation. In 2006 levels stood at 10% of turnover for Disney, Toon Disney, TiJi and Eureka; 13% for Canal J and Tfou, 14% for Jetix and 16% for Teletoon.

Direct funding

The main national funding body is the Centre National de la Cinematographie (CNC), financed by a tax on broadcasters, cinema admissions and video publishers. The CNC is a public body, reporting to the Ministry of Culture, but is financially independent. It is active in all audio-visual sectors, including film, television and new media production, distribution and exhibitions.

The COSIP scheme is the main scheme channelling CNC funding into the animation sector. COSIP was created in 1986 with the aim of supporting original French production in the certain targeted genres for broadcast on French channels. In 2006, COSIP subsidies contributed an equivalent of £26m to animation production, via three main types of financing (amounts contributed in 2006 in brackets):

1. **Selective funding (£3.9m):** targeted at new and small production companies.
2. **Automatic allocations (£18.3m):** reinvestment of funds in companies that have already produced programmes broadcast on French channels. At least 25% of the funding for projects supported by the scheme must be secured through one or more French broadcasters.

3. **Advance payments (£3.9m):** the amount of advance payments for reinvestment is capped per year and per producer; up to 50% of this can be recovered from the automatic account over the following years.

Funding is also available from local and regional agencies through schemes aimed at encouraging regional production. This type of funding is targeted at small producers and can cover up to 10% of a project's budget.

Tax breaks

Audio-visual producers in France can take advantage of tax credits. Two main schemes are in place:

- SOFICAS are production investment funds allowing individuals or companies to write off tax liabilities and can contribute (up to 50%) of a production budget.
- A tax credit scheme (Credit d'impôt), introduced in 2003 for film productions, and later extended to television, allows up to 20% company tax deductions for expenditure in France.

Figure 28: Summary – the regulatory framework

Publicly-funded broadcaster	Commitment to children's provision by publicly-funded broadcaster on its three channels and a part-funded dedicated children's channel
Output and investment requirements	Children's output and investment requirements for national commercial channels A requirement for all broadcasters to air 60% content of European origin and 40% of content from French-speaking countries Investment quotas for dedicated children's cable and satellite channels
Public grants production	The national audio-visual body, CNC, has contributed an average of 15% of all animation production funding in France in the last five years; over 70% is distributed via automatic allocations to broadcasters and production companies. Regional funding, covering up to 10% of programme's budget, is also available
Tax benefits	Production investment funds allowing individuals or companies to write off tax liabilities of up to 50% of a production budget. A tax credit scheme allowing up to 20% tax deductions for expenditure in France

Germany

3.1. Summary

- With a historically high penetration of multichannel TV, children's viewing in Germany is dominated by dedicated channels. The RTL-Disney venture, Super RTL, had the highest share of children's viewing in 2006, at 24%, followed by the publicly-funded Kinderkanal (or Ki.Ka), with a 12% share.
- Children's output on the main commercial mixed-genre channels has declined by 38% since 2002, to 1,603 hours in 2006. Children's hours shown on the main publicly-funded channels also declined by 10% over the period, to 1,240 hours.
- Seven in ten hours shown on publicly-funded channels are originated by the broadcasters, while only around 4% of the main commercial channel output was originated in 2006. Among the dedicated children's channels, three-quarters of Super RTL's and 70% of Kinderkanal's airtime consisted of acquired programming.
- The estimated volume of first-run children's programmes shown on the main channels has declined by 30% between 2003 and 2006, to 461 hours, according to Oliver and Ohlbaum estimates. Within this total, first-run output on the publicly-funded channels declined by 8%, while the main commercial channels saw a 28% decline in first-run hours.
- The main public intervention mechanism to support the provision of children's programmes in Germany is children's provision by the publicly-funded broadcasters ARD and ZDF. Both air children's content on their main mixed-genre channels and jointly fund a dedicated service, Kinderkanal.
- Apart from the TWF requirement for at least 50% EU-originated content (where practicable) applicable across all channels and genres, there are no targeted output or production quotas for children's content applicable to commercial players in Germany. Existing subsidies and tax breaks are focused on the film sector.

3.2. Market context

Virtually no households rely on analogue terrestrial television in Germany: in June 2007 54% of homes had cable TV, 42% of households subscribed to satellite, while some 10% of households had access to digital terrestrial TV⁸. Total multichannel penetration stood at around 98% in June 2007, according to ALM/GSDZ data. As a result, the vast majority of households have access to over 25 channels including several children's channels.

The flagship channels of the country's two public broadcasters, ARD and ZDF, have had stable shares of viewing, at around 14% over the five years to 2006. Among the commercial mixed-genre channels, RTL and SAT1 are the biggest with 13% and 10% shares of viewing respectively in 2006.

⁸ Note that the figures contain some overlap as some households use several TV platforms and hence do not add up to 100%

Figure 29: Market context - Germany

Multichannel TV penetration by platform, June 2007	Main publicly-funded channels (2006 share of viewing, all individuals)	Main commercial channels (2006 share of viewing, all individuals)	Dedicated children's channels
Cable 54%	ARD – Das Erste (14%)	RTL (13%)	Kinderkanal, Boomerang, Disney Channel, Jetix, Junior TV, Nickelodeon, Playhouse Disney, Super RTL, Toon Disney
Satellite 42%	ZDF (14%)	RTL 2 (4%)	
DTT 10%		SAT 1 (10%)	
IPTV 0%		PRO7 (7%)	
		Vox (5%)	
		Kabel 1 (4%)	

Source: Ofcom research, ALM/GSDZ, Screen Digest, Eurodata TV/AGF – GfK

3.3. Children's viewing

The vast majority of children in Germany have long had access to a variety of dedicated channels as well as film, entertainment, music and sports channels. As a result, a relatively small share of children's viewing goes to the main mixed-genre channels. In 2006 these channels accounted for 38% of children's viewing, down from 50% in 2002 (Figure 30). By contrast, the majority (62%) of adults' viewing still goes to the main channels, with public broadcasters accounting for about half (28%) of this total.

The majority of children's viewing on the main channels is to non-children's genre, according to Eurodata TV/AFG – GfK. In 2006, of the average four hours viewed on the main channels per week by children aged 3-13, 9% was of children's programmes. This was down on 2002, when 16% of the total 5.5 hours viewed was of the children's genre.

Figure 30: Main channels' share of viewing among children and all individuals



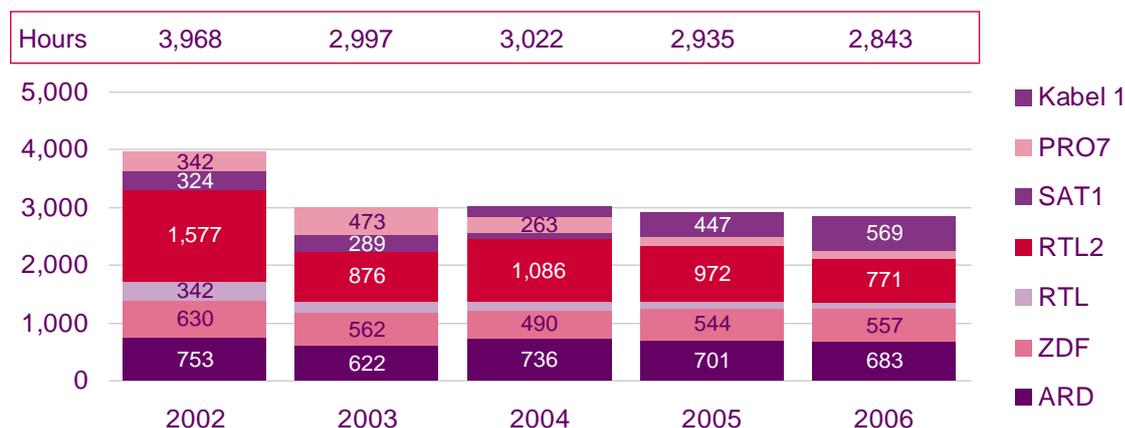
Source: Eurodata TV/AFG – GfK

The top three children's channels accounted for 41% of children's viewing in 2006. Super RTL, a joint venture between RTL and Disney, launched in 1995, is by far the most popular, taking a quarter of all children's viewing in 2006. Publicly-funded Kinderkanal, launched by ARD and ZDF in 1997, was next with 12% of viewing.

3.4. Output of children's programmes

Children's output on the main channels has declined by over a quarter between 2005 and 2006, as shown in Figure 31 below. Within this, the commercial channels output dropped by 38%, to 1,603 hours. Output has remained stable on ARD and ZDF, and the public broadcaster now accounts for nearly half of the total of 2,843 hours shown on main national channels in 2006, compared to a third five years previously.

Figure 31: Children's output on the main national channels



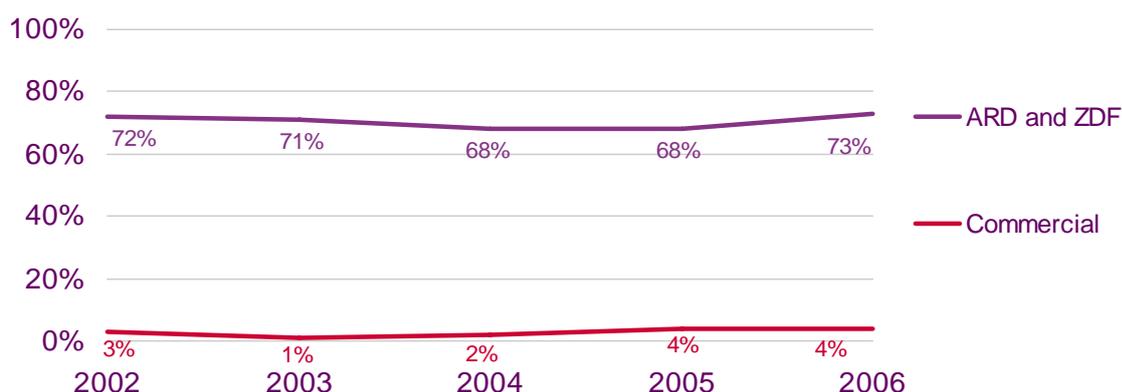
Source: ALM/GöfaK Medienforschung, ZDF

3.5. Origination

According to Screen Digest estimates, broadcasters spent a total of £73m on new children's programmes in Germany in 2006; two thirds of these (71%) were broadcaster originations.

Most children's programmes shown on the main publicly-funded channels are originated by the broadcasters, and the share of originations has stayed stable at around 70% over the past five years. In contrast, the main commercial channels acquire the vast majority of their children's programmes (Figure 32).

Figure 32: Share of originations in main channel output



Source: ALM/GöfaK Medienforschung

According to estimates by Oliver & Olhbaum Associates, the amount of first-run German-originated children's programmes broadcast on the main channels has declined sharply over the past four years, from 667 hours in 2003 to 461 hours in 2006. The decline for the commercial networks was steeper than for the publicly-funded channels; ARD and ZDF accounted for over 80% of hours shown on the main channels in 2006.

Figure 33: Estimated first-run German children's output



Source: Oliver & Ohlbaum estimate based on ALM/GöfaK Medienforschung data. Note: Commercial channels included in the sample are RTL, RTL2, Vox and Kabel1.

According to data provided to Ofcom by ZDF, the share of originations for the publicly-funded dedicated children's channel Kinderkanal stood at 29% in 2006, below the ARD and ZDF main channel average of around 70%. Super RTL, the leading dedicated children's channel, acquires over three-quarters of its programmes, which are mostly of US origin. Original programming on Super RTL covers entertainment productions such as children's shows, sports events and magazines.

Most major production companies in Germany combine production and distribution activity (Figure 34). According to industry interviews carried out by Oliver and Ohlbaum, foreign broadcaster commissions and co-productions play an important role in children's production funding in Germany. France, Italy and the USA are the key collaboration partners for German independent producers. Broadcasters in France are particularly important as projects in France can benefit from public subsidies.

Figure 34: Major children's production companies in Germany

Production company	Main strands
Studio Hamburg	<i>Sesamstrasse, Die Sendung mit der Maus, Tigerenten Club, Rick & Olli, Spur & Partner</i>
Your Family Entertainment	<i>Moorhuhn, Dragon Hunters, Fix and Foxi</i>
TV Loonland	<i>Pettson and Findus, Heidi, Rudi & Trudi, The Owl</i>
EM.TV	<i>Staines Down Drains, Croco Loco, Zigby, Kein Keks fuer Koboelde, Enyo Gasp!, Master Raindrop, Flopper and Lopaka</i>

3.6. Public intervention in children's TV

There are no output quotas in Germany beyond the TVWF output requirements to air a majority of European content where practicable. There are no specific requirements for children's output or investment on commercial channels. Public broadcasters ARD and ZDF, as part of their remit, have a commitment to serving all parts of society, including children, but have no specific quotas.

There is no public funding directed at children's programming beyond the investment committed by the publicly-funded broadcasters. Audio-visual sector subsidies in Germany focus mainly on the film industry, with only occasional support for children's TV projects.

There are no national tax incentives, while local tax breaks, previously in place in some states, have been abolished.

Figure 35: Summary – the regulatory framework

Publicly-funded broadcasters	Commitment to serving children’s audiences by public broadcasters ARD and ZDF, including a dedicated children’s channel
Output and investment requirements	General requirement for all broadcasters to air a majority of European works No quotas for children’s content
Public grants production	No public funding directed at children’s programming at national or regional level.
Tax benefits	Tax breaks mainly targeted at film production

Sweden

4.1. Summary

- Sweden has a high penetration of multichannel TV, with over half of all households subscribing to cable television, while over a quarter take satellite services.
- The number of dedicated channels in Sweden increased from two in 1998 to seven in 2006. As a result, children's viewing is migrating away from the main mixed-genre channels: in 2006, these channels accounted for only 58% of children's viewing compared to over 80% in 2002.
- There has been a general trend of decline in the volume of children's programming on the main commercial channels over the past decade. However, in 2006 the amount of programming has increased, mainly as a result of the increased children's output quota for the largest commercial broadcaster, TV4. Children's output on the publicly-funded channels had been stable at around 650 hours per year since 1998, before increasing to 750 hours in 2005 and 2006.
- Estimated first-run hours of children's programmes shown on the main channels has declined by over a third since 1998, to 222 hours in 2006, mainly as a result of decline in first-run hours shown by the commercial channels. The public broadcaster, SVT, accounted for over 80% of first-run hours of children's content shown on the main channels in 2006.
- There are two main mechanisms supporting children's programme provision in Sweden. The public broadcaster SVT has a specific obligation to cater for children, with a diverse mix of programming and a high level of investment in original programmes; SVT broadcasts children's content on its mixed-genre channels and funds a dedicated children's channel.
- In addition, TV4 is required by the terms of its licence to air at least seven hours of children's (under the age of 12) programming a week between September and May, of which half should be programmes in Swedish or other Nordic languages. Public grants and tax benefits in Sweden are targeted at film production.

4.2. Market context

Sweden has historically had a high penetration of multichannel TV, with over half of households subscribing to cable, while over a quarter have satellite television. With total multichannel penetration of 87% in 2006, Sweden is at the leading edge of digital switchover planned for 2008.

Publicly-owned SVT continues to be the leading broadcaster in Sweden, with its two channels, SVT1 and SVT2, commanding a 39% audience share in 2006.

Among commercial channels, TV4 is the most popular, with a 22% audience share in 2006. TV4 has faced challenges in recent years due to mounting competition from cable and satellite and a downturn in TV advertising. Several satellite channels transmit from the UK; some of these (e.g. TV3 and Kanal 5) have significant audiences in Sweden.

Figure 36: Sweden – market context

2006 platform penetration (change since 2002)	Main publicly-funded channels (2006 share of viewing, all individuals)	Main commercial channels (2006 share of viewing, all individuals)	Dedicated children's channels
Cable 57% (-1%)	STV1 (22%)	TV3 (9%)	Barnkanalen, Cartoon Network, Disney Channel, Jetix, Nickelodeon, Playhouse Disney, Toon Disney
Satellite 27% (+1%)	SVT2 (15%)	TV4 (22%)	
DTT 20% (+17%)		Kanal 5 (9%)	
IPTV 3% (+3%)			

Source: Ofcom research, Screen Digest, Eurodata TV/MMS Mediamätning I Skandinavien AB

4.3. Children's viewing

While the five main mixed-genre channels account for over three-quarters of viewing among all individuals, children's viewing has been migrating to dedicated channels at a fast rate. In total, the main channels attracted over 80% of viewing among 3-14 year olds in 2002, but by 2006 this share had fallen to 58% (Figure 37). Publicly-funded SVT1, the most-watched channel among children in 2002, had the biggest decline, of nine percentage points over the five years, to 22%. Commercial channel TV3's share of children's viewing halved between 2002 and 2006, to 15%.

Figure 37: Share of viewing among children (3-14 years old)



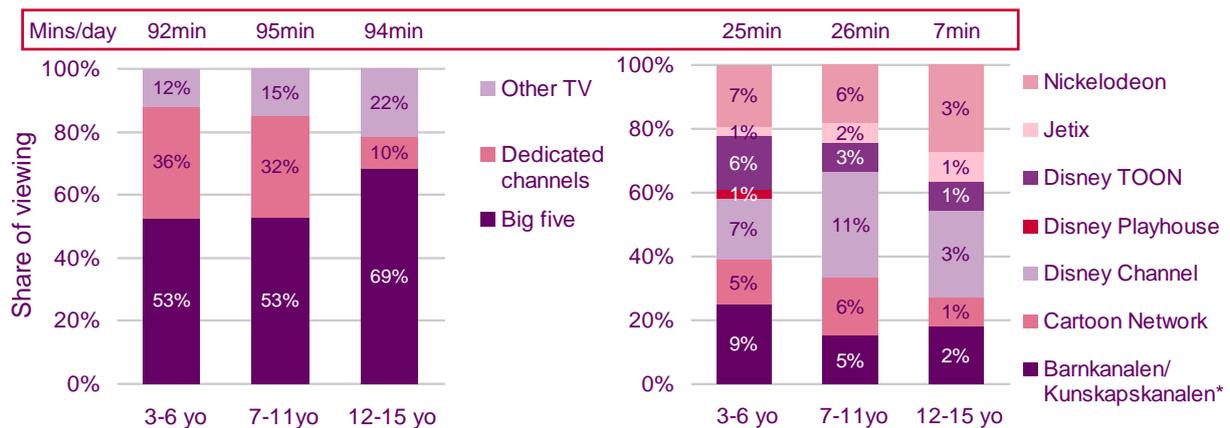
Source: Eurodata TV/MMS Mediamätning I Skandinavien AB

Of the six hours of programming viewed per week by children on the main channels in 2006, 14% was of children's genre programmes. This was lower compared to 2002, both in total time of viewing (7.4 hours per week in 2002) and in share of children's genre of the total viewing time (20% in 2002).

Five new dedicated channels targeting the Swedish market have been launched since 1998, bringing the total to seven. Dedicated services are particularly popular with pre-schoolers, commanding over a third of all viewing in the 3-6 age group; older children are more likely to watch the main national channels (Figure 38).

Among the top dedicated channels, Disney Channel is the leading service among 7-11 and 12-15 year olds. Publicly-funded Barnkanalen, launched by SVT in December 2002, has the highest share of viewing in the 3-6 age group.

Figure 38: Children's viewing of dedicated children's channels, 2006



Source: SVT

4.4. Output of children's programmes

There has been a general trend of decline in the volume of children's programming on the main commercial channels over the past decade. However, in 2006 the amount of programming has increased, mainly as a result of the increased children's output quota for the largest commercial broadcaster, TV4 (see section 4.6). Children's output on the publicly-funded channels had been stable at around 650 hours per year since 1998, before increasing to 750 hours in 2005 and 2006.

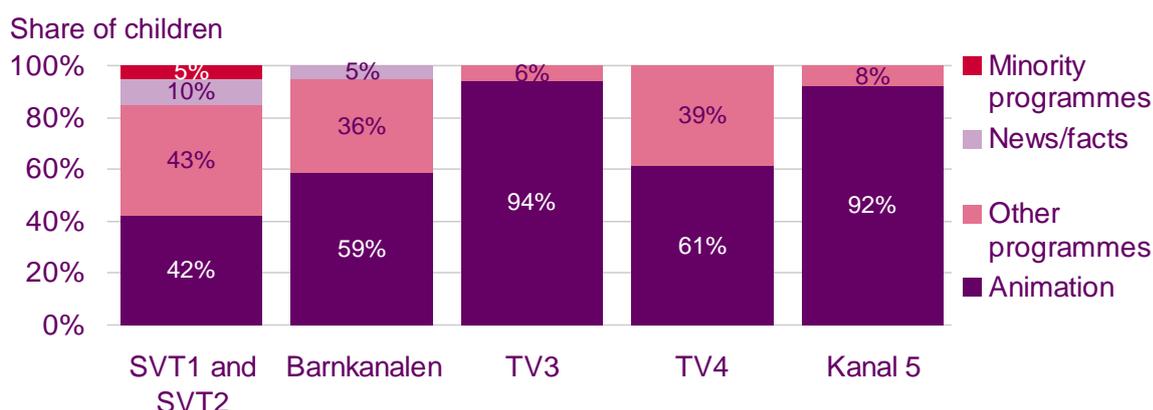
Figure 39: Children's output on the main national channels



Source: Kent Asp, Svenskt TV-utbud 2006. Note: data based on reported weekly transmission data 52 weeks/year were used to calculate annual hours.

Commercial provision is dominated by animation, in particular on TV3 and Kanal 5. The share of animated programmes is much lower for the public broadcaster which devotes 10% of its children's schedule to news and factual, and a further 5% to children's programmes aimed at minorities. Barknakanalen, SVT's digital children's channel, has a higher share of animation and a lower share of news than the public broadcaster's mixed-genre channels.

Figure 40: Children's output by genre, 2006



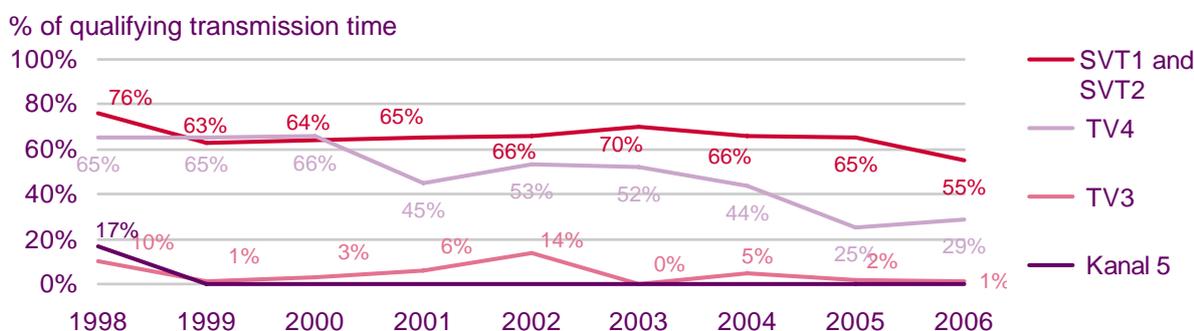
Source: Kent Asp, Svenskt TV-utbud 2006

4.5. Origination

In total, Swedish broadcasters spent £16m on new children's programmes in 2006 according to Screen Digest data; over half of this (52%) were broadcaster originations.

The majority of SVT's children's output is produced in Sweden, although the share of Swedish-originated programmes has declined recently (Figure 41). The share of Swedish programmes on commercial channel TV4 has dropped from over 60% in the late 1990s to 29% in 2006. TV3 and Kanal 5 show few Swedish children's programmes; the majority of their output originates in the USA.

Figure 41: Share of children's programmes originating in Sweden



Source: Kent Asp, Svenskt TV-utbud 2006

Estimates by Oliver & Ohlbaum suggest that the public broadcaster SVT accounts for the vast majority of new Swedish programmes broadcast on the main channels, as shown in Figure 42 below. Oliver & Ohlbaum estimate the volume of first-run programming on the main commercial channels TV3, TV4 and Kanal 5 had been declining since 1998, picking up again in 2006 when these channels showed an estimated 43 hours of first-run Swedish programmes. This increase is likely to be partly a result of increased output quota for TV4 (see section 4.6).

Figure 42: Estimated first-run hours of Swedish programmes on the main national channels



Source: Oliver & Ohlbaum estimate based on Kent Asp, *Svenskt TV-utbud 2006* data

According to industry interviews conducted by Oliver & Ohlbaum Associates for this project, the majority of new children's programming is made in-house by the public service broadcaster. The children's independent production sector is small, with four larger independent producers focusing on the Swedish market.

The largest, Nordisk Film, produces most of TV4's programmes. The company is owned by conglomerate Egmont which also holds 50% of Norway's free-to-air channel TV2. Its main children's strands are *Jonson and Pipen*, and *Lattjo Lajban*.

Svensk Filmindustri (SF) is another large producer, focusing mainly on cinema but also producing TV programmes, including children's. It is owned by the conglomerate Bonnier, which also has publishing and other media (cinema, music, radio and TV) operations. SF's main children's strands include *Loranga*, *Masaring and Dartanjang* and *LasseMajas Detektivbyra*. Jarowski, which forms part of the Zodiak group, and Tre Vaenner, are the other two active children's producers.

4.6. Public intervention in children's TV

The public broadcaster SVT plays a significant role in supporting provision of children's programming in Sweden. The broadcaster's service licence for 2007-09 specifies that it should broadcast a diverse range of high-quality programmes for children and young people, which should convey news and facts, as well as cultural and artistic experiences, from different parts of Sweden and the world.

SVT must extensively invest in different genre programmes for children, catering specifically for the language needs of children and young people from linguistic or ethnic minorities including those using signing as their first language.

TV4, the largest commercial channel, has an obligation to broadcast a certain amount of children's programming. Up to 2006 the channel was required to air five hours of children's programmes per week; this was increased to seven hours in TV4's current licence which runs from 2006 to 2008. The seven-hour requirement applies to the September-May period and specifies that half of all children's programmes shown should consist of material in Swedish or another Nordic language.

In addition to this, the provisions set out in the EU Television Without Frontiers Directive, requiring channels, where practicable, to air a majority of European programmes and to source 10% of their output from independent producers, also apply.

There are no production quotas for commercial players in Sweden, and no government funding or tax incentives exist for the children’s television production sector; such benefits are targeted mainly at film production.

Figure 43: Summary – the regulatory framework

Publicly-funded broadcasters	Commitment to children’s provision by public broadcasters SVT, including a dedicated children’s channel
Output and investment requirements	General requirement for all broadcasters to air a majority of European works and 10% of transmission time to be reserved for works by independent producers Requirement for TV4 to air seven hours of children’s programmes during September-May period, of which half should be programmes in Nordic languages.
Public grants production	No public funding targeted at children’s programming
Tax benefits	Tax breaks mainly targeted at film production
Other	Advertising to children under 12 years of age is not permitted

Australia

5.1. Summary

- With multichannel penetration at 41% in 2006, the main mixed-genre channels continue to attract the majority of children's viewing. In 2006, the main channels accounted for 72% of viewing among the 0-14 age group in 2006; this was down ten percentage points from 2001 as a result of the growing number of dedicated children's channels available on subscription television (from four to six) and increase in multichannel take-up.
- An estimated 3,968 hours⁹ of children's content were aired on the main terrestrial channels in 2006, an equivalent of 76 hours per week. Public broadcaster ABC's main channel accounted for just over half of this total, with 2,033 hours, up 14% in five years. This channel's share of children's viewing has stayed stable at around 18% over the past five years.
- Children's output on the commercial free-to-air networks has been stable over the past years, supported by the output quota for commercial free-to-air television broadcasting licensees. The three metropolitan commercial free-to-air television networks – Seven, Nine and Ten – together aired 1,185 hours of qualified children's programmes in 2006 (so called C and P content) in addition to an estimated 750 hours of non-quota programming¹⁰. The networks' share of children's viewing has declined from 63% in 2001 to 55% in 2006.
- The latest available data on the total size of the children's sector are for 2002/03, when an estimated 1,100 hours of the children's programmes were produced by commercial players in Australia. Independent producers dominate the children's production sector in Australia, contributing four times the amount spent by broadcasters (£26.5m compared to £6.5m).
- More recent data on children's programme origination in Australia focus on children's drama. In 2005/2006, 139 hours of children's drama were produced, generating an equivalent of £33m spend in Australia. Foreign sources have accounted for the largest share (37%) of funding for new children's drama programmes over the past five years. The Australian film and TV industry contributed 33%, while other private investment supplied 5% of funding. Australian government sources contributed 26% of funding for new children's drama.
- There is a broad range of public measures to support children's television production in Australia. In addition to provision by the public broadcaster ABC, there are minimum requirements for the commercial free-to-air television licensees for the amount of Australian content in children's programming as well as quotas for first-release Australian children's drama. These quotas are combined with qualitative criteria for programming. The Australian communications regulator, ACMA, is currently undertaking a review of these requirements.
- The Film Finance Corporation, via a public funding scheme, contributed £10m to children's drama production in 2005/06; regional funding to support local production

⁹ This includes 750 hours annually of non-quota programming estimated from a sample week in 2007.

¹⁰ The estimate is based on a sample week in 2007.

is also available. In addition, Australia uses tax benefits to encourage the Australian audio-visual production sector and to attract foreign projects.

5.2. Market context

There are two publicly-funded broadcasters in Australia, both broadcasting free-to-air (FTA). The Australian Broadcasting Corporation (ABC) was the first television service in 1956, and the multicultural Special Broadcasting Service (SBS) was introduced in 1980. ABC's share of viewing has stood at around 12% for the past two years, while SBS accounts for around 4% of viewing.

There are three commercial free-to-air television broadcasting networks, largely operating in metropolitan markets in Australia – Seven, Nine and Ten. These networks attract the majority of viewing with a 62% share in 2007, although they have been losing share to cable and satellite in recent years. Most commercial free-to-air television broadcasters in regional Australia broadcast one of the three metropolitan network's programmes.

Penetration of digital terrestrial television has increased from just 1% of Australian households in 2002 to over a quarter in 2006, according to Screen Digest. Total multichannel penetration stood at 41% in 2006, according to data published by the communications regulator ACMA.

ACMA is currently undertaking a review of Australia's *Children's Television Standards* – the main policy instrument in children's television. The review aims to ensure that the standards are operating effectively in the current environment and looks if, and how, they need to be changed to be effective in the future.

Figure 44: Australia - market context

2006 platform penetration (change since 2002)	Publicly-funded mixed-genre channels (2006 share of viewing, all individuals)	Main commercial mixed-genre channels (2006 share of viewing, all individuals)	Dedicated children's channels
Cable 9% (-1%)	ABC (12%)	Seven (23%)	Nickelodeon, Cartoon Network, Boomerang, Disney Channel, Nick Jr., Playhouse Disney
Satellite 16% (+6%)	SBS (4%)	Nine (25%)	
DTT 27% (+26%)		Ten (19%)	
IPTV 0% (0%)			

Source: Ofcom research, Screen Digest, Oztam

5.3. Children's viewing

Commercial free-to-air television networks continue to account for the majority of children's viewing in Australia, but their share has fallen as viewing migrates to dedicated channels (Figure 45). Channels other than the main terrestrials now account for 28% of viewing among the 0-14 age group, up ten percentage points over five years. Public broadcasters ABC and SBS have maintained their share, jointly accounting for around a fifth of children's viewing.

Figure 45: Changes in share of viewing among children's and all individuals



Source: ACMA/OZTAM

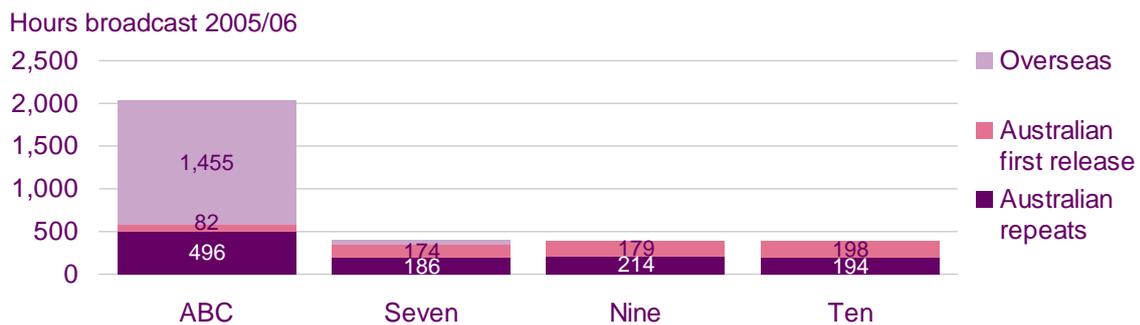
5.4. Output of children's programmes

Public broadcaster ABC is the largest children's outlet in terms of the volumes of programming shown (Figure 46). In 2005/06, the ABC channel aired over 2,000 hours, up from 1,777 hours in 2001/02. In both years around three-quarters of total output was non-Australian content.

The metropolitan commercial free-to-air networks aired around 390 hours of children's and pre-school content, in line with the quotas laid out in the *Children's Television Standards* (also referred to as C and P content, see Section 5.6 for detail). In line with the requirements, the vast majority of this output was of Australian content.

According to estimates provided to Ofcom by the Australian communications regulator ACMA, based on a one week sample of programming in 2007, in addition to required programming the three networks air around 750 hours per year of other children's content. This non-quota material mainly comprises magazine and cartoon programmes as well as films directed to children.

Figure 46: Children's output on the main national channels



Source: ABC, ACMA. Note: Hours shown for the metropolitan networks Seven, Nine and Ten are for the calendar year 2005 and are for children's and pre-school content as required by Children's Television Standards, which excludes the estimated 750 hours of additional non-quota children's programming. ABC hours are for the financial year 2005/06 (July-June).

5.5. Origination

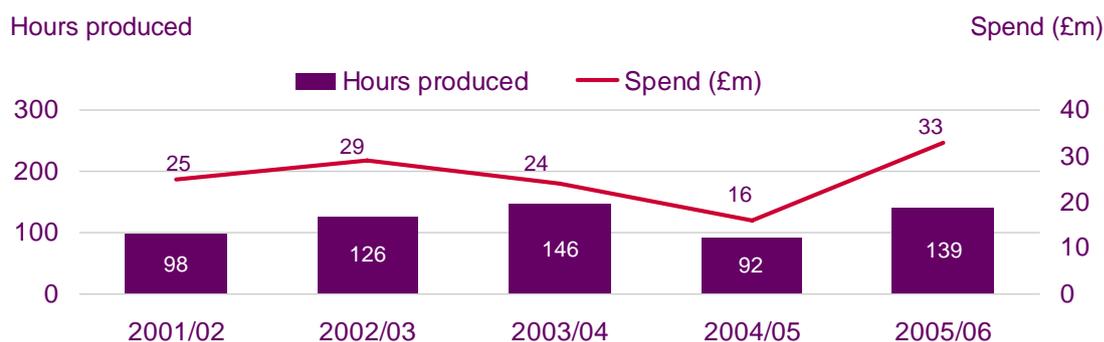
The latest available data on the total size of children's sector are for 2002/03, when an estimated 1,100 hours of children's programmes were produced by commercial players in

Australia, according to the communications regulator ACMA in its ongoing review of children’s television regulations.¹¹

Independent producers dominate children’s production sector in Australia: in 2002/03 they contributed an equivalent of £26.5m to children’s programmes, compared to the £6.5m spent by broadcasters.

More recent data on children’s programme origination in Australia focus on children’s drama. In 2005/2006, 139 hours of children’s drama were produced, generating an equivalent of £33m spend in Australia. The volume of new children’s drama has varied significantly year-on-year; the five-year average between 2001/02 and 2005/06 stood at 120 hours and £25.4m in production spend.

Figure 47: Volume and spend on Australian children’s drama



Source: Australian Film Commission

While the balance of funding sources for children’s drama has varied over the years, foreign funding (mainly secured through co-productions and international pre-sales) accounted for the largest share (an average of 37%) of funding between 2001 and 2005.

According to ACMA’s research, it is becoming increasingly difficult for Australian children’s producers to secure foreign funding. Producers need to rely on a larger number of partners than in the past, making it more difficult to raise funds (as the partners need to satisfy the conditions for their own markets) and to command a greater amount of pre-sales than in the past, resulting in increasingly complex investment deals. There is also international demand for higher-quality programming alongside a decline in average licence fees. However, ACMA’s study has found that the benefits of co-productions outweigh the costs, and producers in Australia support the establishment of more official co-production treaties with other countries.

¹¹ Children’s television standards review http://internet.aca.gov.au/WEB/STANDARD/pc=PC_310262 [accessed 07/09/07]

Figure 48: Australia - sources of funding for children's drama



Source: AFC

The Australian film and TV industry has contributed an average of 33% investment in children's drama over the past five years; this investment is supported through quotas applied to commercial networks and dedicated pay channels. However, the overall Australian TV industry's support for children's drama is relatively low, especially compared to adults' drama, where the industry contributes 67% of the total production spend. Private investment, stimulated by tax benefits for investment in film and television projects, accounted for 9% of total spend in 2005/6. Public sources play an important role, having contributed an average 26% of the total funding over the past five years.

All major production companies in Australia, such as Southern Star, Beyond and Becker, combine production and distribution activity (Figure 49).

Figure 49: Major children's production companies in Australia

Production company	Main strands
Southern Star	Blue Water High, Raggs, The Sleepover Club, Tracey McBean, The Adventures of Bottle Top Bill
Beyond	Backyard Science, New MacDonald's Farm, Milly Molly, Thunderstone
Becker	Download, Now You See It, Valley of the Giants
Flying Bark Productions	Blinky Bill, Dot and the Kangaroo, Bambaloo, Art Live
Banksia	Here's Humphrey, Here's Humphrey Spanish Series (Latin America), Here's Humphrey USA, Here's Humphrey Mandarin, The Curiosity Show, Hot Science, The Music Shop, Kids Downunder, Guess What, Pick Your Face

5.6. Public intervention in children's TV

Provision by the public broadcaster

ABC's editorial policies state that children's programming is part of that content through which ABC reflects a wide range of audience interests, beliefs, and perspectives. The broadcaster has increased the hours of children's content shown on its main channel by 14% since 2002, to 2,033 hours in 2006. ABC2, the public broadcaster's digital channel launched in March 2005, showed 1,709 hours of children's programmes in 2006. The two channels combined provide 13 hours of uninterrupted children's programming a day.

Over a fifth (22%) of total output across the two channels is Australian programming; in 2005/06, the broadcaster showed 89 hours of first-release Australian children's programmes, according to its annual report.

Output and investment quotas

Children's programming on Australia's commercial free-to-air broadcasting networks is governed by Children's Television Standards (CTS), dating back to 1984. The current set of rules requires commercial free-to-air television licensees to broadcast at least 390 hours of children's programmes a year, of which 260 hours must be children's (C) programmes and count towards the quota. C periods are between 7-8 am and 4-8.30 pm Monday to Friday; and 7am-8.30pm Saturday, Sunday and school holidays. P programming must be broadcast between 7am and 4.30pm Monday to Friday to count toward the quota. Programmes other than Australian children's drama must not be repeated more than three times in a five-year period.

Half of the minimum annual requirement of 260 hours of C programming must be first-release Australian content, and all P programmes must be Australian. Licensees must broadcast at least 96 hours of first-release Australian children's drama over a three-year period, with a minimum of 25 hours in each year. At least eight hours per year of repeat Australian C drama is also required. Children's programmes must meet specific criteria to be claimed as C or P programmes: they must be child-specific, entertaining, and well-produced; they have to enhance children's understanding and experience, and be appropriate for Australian children.

CTS rules governing advertising to children limit the amount and nature of advertising directed at children on commercial free-to-air television. Advertising is not allowed in pre-school programmes. The duration of adverts during C periods, when C programmes are aired, is limited to five minutes per 30 minutes of material. However, in C periods when Australian C drama programs are aired, the maximum amount of advertisements, programme promotions, station identifications and community service announcements is 13 minutes per hour.

There are also requirements for the presentation of advertising and promotional material and restrictions on the number of repeated adverts during C periods on free-to-air commercial television. The rules aim to ensure that advertising material directed at children is presented clearly and in a way which children understand.

The standards are currently undergoing a review by the communications regulator ACMA. At the time of writing, the first phase of the review had been published for consultation with stakeholders. The review identified a number of challenges to the current operation of the standards in relation to audiences and advertising around children's programmes. ACMA's research has found that audiences during the 4-5pm slot when children's programmes are usually shown are falling: weekday audience share among 5-12 year olds as a proportion of total audience has dropped from 8.1% in 2001 to 3.9% in 2006. ACMA's research has also found that few advertisers apply for the children's classification, making it difficult for commercial broadcasters to generate revenue around C programmes.

In addition to children's output quotas for the free-to-air networks there are investment requirements for subscription drama channels which apply to several dedicated children's services. The rules, set out in the Broadcasting Act of 1992, require pay television drama channels (i.e. channels dedicating more than 50% of airtime to drama programmes) to spend 10 per cent of their total programme expenditure on new eligible (Australian and New Zealand) drama programmes. These rules apply to five of the six existing subscription

children's channels (with the exception of Nick Jr. which does not qualify as a drama channel).

Direct funding

The Film Finance Corporation (FFC) is the principal Australian government agency providing financial support to the Australian film and television production industry. It invests in qualifying Australian feature films, tele-movies, mini-series and documentaries. Since its establishment in 1988, the FFC has been a key investor in children's drama. In 2005 the FFC contributed an equivalent of £10m to children's programmes.

In addition to the FFC's contribution, a number of agencies in Australian states run support schemes for local television production. For example, the Pacific Film and Television Commission (PFTC) in Queensland supports local producers and attracts interstate productions through equity investment, loans via the revolving film finance fund, production incentives and location assistance. The level of investment varies but has been as high as £0.8m for a particular production. Other agencies include Screenwest in Western Australia, The New South Wales and Television Office and Film Victoria.

Tax benefits

Private investment in audio-visual production in Australia is encouraged through a system of tax benefits, which is currently undergoing a change. Until 1 July 2007, income tax deductions of up to 100% were available on investment in qualified Australian projects. In 2005/06, tax benefit schemes attracted an estimated £3m of funding for children's projects.

From 1 July 2007, this level of support has been increased, and the tax break system was replaced with rebates to producers; this is seen by the Government as a more efficient support mechanism. The Producer Rebate scheme offers up to 20% rebate on spend on qualifying Australian television projects. In addition, the Location Rebate, devised to increase Australia's attractiveness as a location for large offshore productions, has been increased from 12.5% to 15% of qualifying Australian spend.

Figure 50: Summary – the regulatory framework

Publicly-funded broadcaster	Children's blocks aired by the public broadcaster on its main and digital mixed-genre channels
Output and investment requirements	Children's output quota for commercial free-to-air television licensees, including minimum Australian programming requirements and first-release Australian children's drama. Minimum spend requirements for Australian and New Zealand drama for subscription TV drama channels apply to five of the six existing dedicated children's channels.
Public grants production	Film Finance Corporation contributes to children's drama projects (£10m in 2005) Funding also available from Australian states to support local production
Tax benefits	The Producer Rebate scheme offers up to 20% rebate on spend on qualifying Australian television projects. The Location Rebate allows to claim back up to 15% of qualifying Australian spend.

Canada

6.1. Summary

- With over four in five homes subscribing to multichannel TV, Canadian children's viewing is highly fragmented, with the main national channels accounting for only 18% of viewing among 2-11 year olds in 2005/06. Treehouse is the most popular channel among 2-11 year olds, with 16% share of viewing in 2005/06, followed by the YTV and Family channels, both with 12%.
- Canadian public broadcaster CBC broadcast around 2,500 (48 hours/week) on its two channels for each of the past three years; the vast majority of its children's airtime consists of Canadian programmes. The English-language service CBC devoted 11% of its airtime to original programmes in 2005/06, while 16% of children's programmes shown on its French-language counterpart SRC were new originations.
- On average, 791 hours of children's programmes were produced between 2001/02 and 2005/06, generating an average of £135m in average annual spend. Children's television production volumes have varied significantly over the past decade, but the general trend was downward: in 2005/06, 128 hours of children's programmes were produced compared to 163 hours in 2001/02. The move in Europe towards a more continental market and correction following overheating in the early 2000s were highlighted by the producers body, CFTPA, as key reasons behind the decline.
- Broadcasters account for only around a quarter of all spend on new programmes (24% on average between 2001/02 and 2005/06), with the majority of this (16%) funded by private broadcasters. Federal and provincial tax credits are the second major source of funding, accounting for 24%. Canadian distributors and production companies contribute a further 24%, while foreign pre-sales account for 14% of funding.
- A wide range of interventions are employed in Canada to support provision of high-quality original content for children. The publicly-funded broadcaster CBC, which focuses on original Canadian programming, airs children's blocks on its English-language and French-language networks (CBC and SRC). There are also output obligations for national networks and educational television services, as well as detailed output and investment requirements for dedicated children's channels.
- Significant funding is available to support children's producers from the Canadian Television Fund (an equivalent of £21m in 2005/06) and several other bodies. There are also tax benefit schemes: CPTC is aimed at encouraging distinctly Canadian content (CPTC) allows for up to 25% of labour expenditure write-offs, while PSTC allows up to 16% labour expenditure write-offs for projects not claiming CPTC. In addition, provincial tax credits can add a further 25% of budget, depending on the amount of labour costs in the relevant province.

6.2. Market context

The Canadian children's television landscape is shaped by two key factors: the near-universal availability of multichannel TV and the high level of government support for the production and broadcasting of Canadian content. Total multichannel penetration stood at

81% in 2006, according to Screen Digest, with cable the most popular platform (57% of households).

Canada's public broadcaster, CBC, operates two networks, CBC Television in English and la Société Radio-Canada (SRC) in French; both networks primarily show Canadian content. CBC attracts 5% of viewing in English-speaking Canada, while its French language counterpart accounts for 13% of viewing in Quebec.

There are many private channels, among which CTV (English), Global (English) and TVA (French) are the largest in terms of viewing share. There are some smaller regional and local services; in addition, there are several regional educational television networks operating in many Canadian provinces.

US-based satellite services are also available to many parts of Canada; however, it is illegal to sell US satellite services directly to consumers in Canada.

Figure 51: Market context - Canada

2006 platform penetration (change since 2002)	Publicly-funded channels (Q4 2006 share of viewing, all individuals)	Main commercial channels (2006 share of viewing, all individuals)	Provincial educational broadcasters offering children's content	Dedicated children's channels
Cable – 57% (-3%)	CBC (5%)* SRC (13%)**	CTV (11%) Global (8%) TVA (27%)**	ACCESS (Alberta) Knowledge Network (British Columbia) SCN (Saskatchewan) TVO (Ontario) Télé-Québec – (Quebec) TFO (Ontario)	BBC Kids, Teletoon/Télétoon, Discovery Kids, The Family Channel, Treehouse TV, VRAK TV, YTV
Satellite – 24% (4%)				
DTT – 2% (2%)				
IPTV – 1% (1%)				

Source: Eurodata TV/BBM Canada, * Canada excluding Quebec. ** In Quebec

6.3. Children's viewing

Children's viewing is highly fragmented, with the main national channels accounting for 18% of children's viewing – a decline of six percentage points since 2002, mainly as a result of growth in the share commanded by dedicated children's channels.

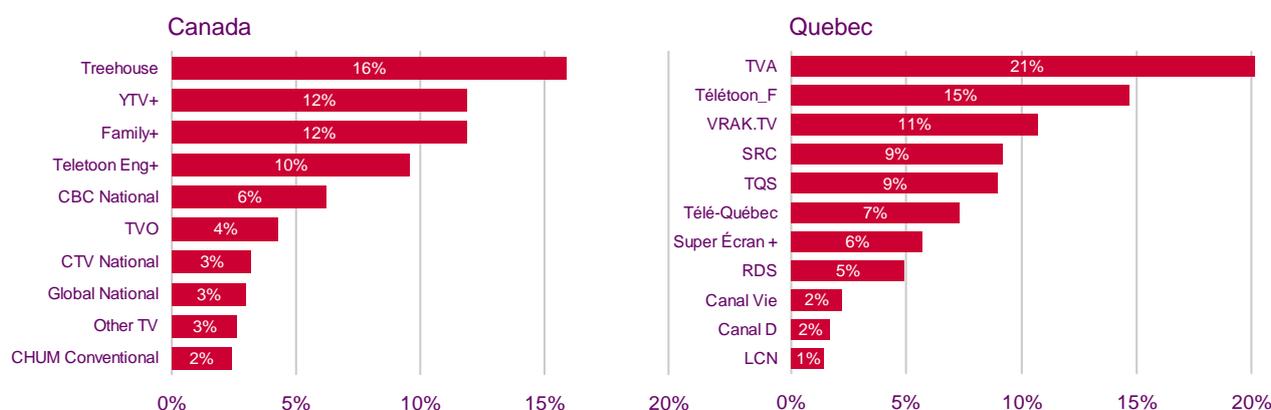
Figure 52: Share of viewing by broadcaster type



Source: CRTC/BBM-Nielsen Media Research

Treehouse is the most popular channel among children, with 16% share of viewing in Q4 2006, followed by YTV+ and Family+ with 12% each. The national public broadcaster CBC has a 6% of viewing share, while national commercial network CTV accounts for 3% of children’s viewing. TVA, the French-language commercial network, leads children’s viewing in Quebec, with 21% of viewing among 2-11 year olds. Provincial educational services also play an important role in children’s viewing – for example, Ontario’s TVO had a 4% share of children’s viewing nationally in 2006, while Télé-Québec was the sixth most viewed channel in Quebec

Figure 53: Top ten channels among children 2-11 by share of viewing – Q4 2006



Source: Eurodata TV/BBM Canada. Note: viewing share for 8/28/2006 to 12/31/2006

6.4. Output of children’s programmes

Canadian public broadcaster CBC has aired around 2,500 (48 hours/week) on its two channels for each of the past three years. The English-language service CBC broadcast 30.8 hours per week of children’s programmes, significantly above the minimum of 15 hours per week it is required to air by the regulator CRTC. The vast majority (76%) of its children’s output over the past five years were Canadian programmes, of which 11% were original programmes.

SRC, the French-language mixed-genre public service, broadcast an average of 17 hours of a week of children’s programmes in 2005/06, a decline of 34% over the past five years. The channels air an average of 16% of original Canadian children’s programming.

Data on children's output for other mixed-genre networks in Canada were not available.

Figure 54: Children's hours shown by publicly-funded broadcasters



Source: CRTC reports; weekly figures converted to annual output using 52 weeks/year

Provincial networks also play a significant role in provision of children's programmes, alongside the main commercial channels – however, output data for these channels were not available.

6.5. Origination

Children's television production volumes have varied significantly over the past decade, but the general trend, according to a recent report by the producers' body CFTPA, was downward (Figure 55). On average, 791 hours of children's programmes were produced between 2001 and 2005, generating an average of £135m in average annual spend.

Figure 55: Children's production volume and spend



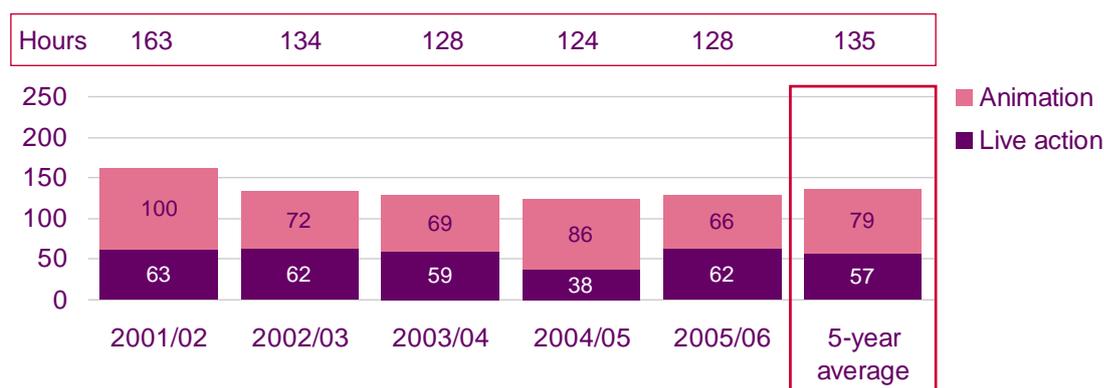
Source: CFTPA

Children's programmes accounted for 16% of total TV production value in 2005/06, down from 22% in 1999/00, according to CFTPA data.

The majority of this decline can be traced back to animation, which forms around 60% of total children's production volume. Developments in the global television marketplace were the single biggest cause of the decline.

The worldwide trend towards more indigenous programming in television schedules, and the move in Europe towards a more continental market, have led to a drop in the international trade in television programmes. In addition, there are signs of a market correction following overheating from financial investment in local production companies in the early 2000s.

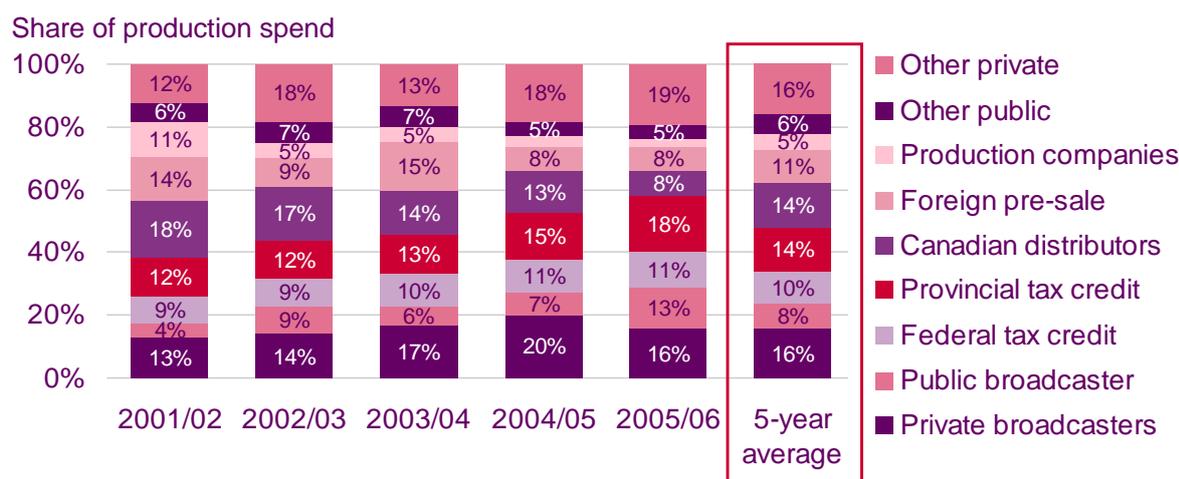
Figure 56: Children’s production spend by genre



Source: CFTPA

Sources of funding for children’s programmes vary from year to year. On average, broadcasters accounted for a quarter of all spend on new programmes between 2001/02 and 2005/06, with the majority of this (16%) funded by private broadcasters. Federal and provincial tax credits are the second major source of funding, accounting for 24% of the total. Canadian distributors and production companies contribute a further 24%, while foreign pre-sales accounted for 14% of funding between 2001 and 2005.

Figure 57: Sources of funding for children’s television production



Source: CFTPA. Note: ‘Other public’ includes financing from the Canadian Television Fund’s (CTF) equity programme, provincial governments, Telfilm Canada and other government departments and agencies. ‘Other Private’ includes the CTF’s licence fee programme, broadcaster equity and other private investors.

Most major Canadian producers of children’s TV combine production and distribution activity. Among the largest are Nelvana, Cookie Jar Entertainment and DHX Media (Figure 58).

Figure 58: Major producers of children’s TV in Canada

Production company	Main strands – titles sold internationally
Nelvana	<i>6Teen</i> - Nickelodeon (U.S.) <i>Berenstain Bears, Cyberchase, George Shrinks</i> - PBS (U.S.) <i>Beyblade</i> - JETIX (U.S.), Nickelodeon (U.K.), Cartoon Network (U.K.), Cartoon Network (Australia) <i>Franklin, Little Bear, Maggie and the Ferocious Beast, Max and Ruby, Miss</i>

	<i>Spider's Sunny Patch Friends</i> - Noggin (U.S.) <i>Jacob Two-Two</i> - TPS Jeunesse (France), Cartoon Network (Latin America) ARD (Germany), KiKa (Germany), JETIX (U.S.) <i>Rescue Heroes</i> - Disney Channel (U.S.) <i>The Backyardigans</i> - Nick Jr./Noggin (U.S.)
Cookie Jar Entertainment	<i>Arthur, Postcards from Buster, Caillou</i> - PBS (U.S.) <i>Gerald McBoing Boing</i> - Cartoon Network - (U.S.) <i>The Doodlebops</i> - Disney Channel - (U.S.)
DHX Media	<i>Angela Anaconda, Bromwell High</i> - Channel 4 (U.K.) <i>Franny's Feet</i> - Channel 4 (U.K.), ABC (Australia) <i>Naturally Sadie</i> - Disney Channel (U.S.), Nickelodeon (U.K.) <i>Radio Free Roscoe</i> - The N (U.S.) <i>Save-Ums!</i> - Discovery Kids (U.S.) TLC (U.S.)
Sudio B Productions	<i>Amazing Adrenalini Brothers</i> - ITV (U.K.), Cartoon Network (U.K.), ABC (Australia) <i>Being Ian</i> - ABC (Australia) <i>D'Myna Leagues</i> - WB Kids! (U.S.) <i>Yvon of the Yukon</i> - CBBC (U.K.)
Breakthrough Films and TV	<i>Atomic Betty</i> - Cartoon Network (U.S.)

6.6. Public intervention in children's TV

Provision by the public broadcaster

The public broadcaster has an obligation, as part of its remit, to serve the needs and interests, and reflect the circumstances and aspirations, of Canadian men, women and children. Its programming should be varied and comprehensive, providing a balance of information, enlightenment and entertainment for men, women and children of all ages, interests and tastes.

Specifically in the children's genre, CBC is expected by the regulator CRTC to broadcast a minimum of 15 hours per week of children's programmes. SRC required to broadcast an average of at least four hours per week of original Canadian children's programming and to broadcast a minimum of 20 hours per week for children and youth.

Output and investment quotas

Many private broadcasters have obligations in relation to children's output and/or investment (see Annex 2.1.1 for detail). Among the large private networks, CTV is required to broadcast 2.5 hours/week of children's content, while Global is expected to be committed to children's programming, without having a specific quota. Many educational services also have children's content requirements; for example, TVO/TFO is expected to broadcast 70 hours per week of educational programming dedicated to children and TFO has committed to broadcast at least 29 hours per week of Canadian programming for children (ages 2 to 12) and at least ten hours per week of programming for youth (12 to 17).

Dedicated children's cable and satellite services also have detailed obligations in place. For example, Treehouse - the most watched children's channel in 2006 - is required to broadcast programming for pre-school children up to six years of age between the hours of 6:00 a.m. and 9:00 p.m. It is required to spend 36% of revenue on the acquisition of and/or investment in Canadian programming, and to devote not less than 70% of its broadcast schedule to the exhibition of Canadian content. YTV should commission 325 half-hours of original Canadian production over the term of its licence.

Discovery Kids is required to broadcast programming targeted at children of all ages, and to devote not less than 35% of its broadcast schedule to the exhibition of Canadian content. BBC Kids must devote 65% of its schedule to programming that targets children aged 2 to 11 and 35 % to young people aged 12 to 17. It is required to devote not less than 35% of its airtime to Canadian content.

Direct funding

The Canadian Television Fund contributed the equivalent of £21m to Canadian children's programmes in 2005/06. The CTF is a public/private partnership created to support provision of high-quality, distinctly Canadian, programming in under-represented genres, particularly in peak viewing times.

In addition, a number of other bodies, usually funded through private sources such as cable provider and broadcaster contributions as well as donations, offer support for children's programming. Shaw Rocket Fund is the largest, with an equivalent of £4.8m contribution to Canadian children's programmes in 2006.

Tax benefits

Several tax credits are also available in Canada. The Canadian Production Tax Credit (CPTC) was implemented in 1995 to support development of the Canadian audio-visual industry. The tax credit requires a minimum level of Canadian creative and/or managerial control of the project and can amount to 25% of the qualified labour expenditure.

The Production Services Tax Credit (PSTC) can cover up to 16% of Canadian labour expenditure is available to productions that have not claimed the CPTC.

Provincial tax credits can add a further 25% of budget depending on the amount of labour costs in the relevant province. In 2005/06 the value of national tax credit schemes to children's TV was £14m, while provincial tax credits added a further £23m, according to the Canadian Television and Film Producers Association.

Figure 59: Summary – public intervention in children's television

Publicly-funded broadcaster	Children's blocks aired by the English-language and French-language publicly-funded broadcasters, with majority Canadian content.
Output and investment requirements	Output obligations for two of the three main national networks and several educational services; detailed output and investment requirements for cable and satellite dedicated channels.
Public grants production	The Canadian Television Fund contributes to children's projects (£21m in 2005/06) Several other funds, such as the Shaw Rocket Fund, also offer finance
Tax benefits	The Canadian Production Tax Credit (CPTC) requires a minimum level of Canadian creative and/or managerial control of the project and allows write-off up to 25% of the qualified labour expenditure The Production Services Tax Credit (PSTC) can cover up to 16% of Canadian labour expenditure and is available to productions that have not claimed the CPTC. Provincial tax credits can add a further 25% of budget, depending on the amount of labour costs in the relevant province.

The USA

7.1. Summary

- The US children's television market is dominated by dedicated cable networks. Viacom-owned Nickelodeon is a long-time leader in children's TV, with an 18% share of viewing among the 2-11 age group in 2006. Disney Channel and Cartoon Networks followed with 14% and 10% respectively. These top three channels jointly commanded 42% of children's viewing in 2006, a slight increase over 2002 (39%).
- Most mixed-genre networks also show programmes for children and youth. CBS, Fox and NBC all broadcast Saturday morning children's blocks, while ABC's children's programming is provided by Disney. CW, a new network formed by a merger of UPN and WB in September 2006, continues to show the popular *Kids WB!* block from its predecessor networks.
- PBS, the non-profit public broadcasting television service with 355 local member stations – is active in children's provision with its PBS KIDS brand. PBS children's content forms the basis of PBS Kids Sprout, a commercial joint venture with Comcast, HIT Entertainment and Sesame Workshops and launched in 2005.
- In total, US broadcasters spent an estimated £183m on new children's programmes in 2006; according to Screen Digest, a 22% decline since 2002. Like other television genres, children's programming in the USA is characterised by a high level of vertical integration. Screen Digest estimates that 80% of all programming was produced in-house by the broadcasters in 2006.
- Public intervention in supporting children's programming in the USA focuses on supporting the provision of educational content for the young audiences. The 1990 Children's Television Act includes a guideline for television stations to air at least three hours a week of programmes specifically designed to serve the educational and informational needs of children. Since 2007, the guideline has been extended to digital broadcasts.
- Public funding for new children's content in the USA is relatively small, with some targeted funding available from public bodies from time to time. For example, the Corporation for Public Broadcasting, which partly funds PBS, received a five-year grant of \$72 million (£40m) in 2005 from the US Department of Education as part of its *Ready to Learn* initiative.

7.2. Market context

The USA has long had a high penetration of multichannel television, with two-thirds of households subscribing to cable TV, and a quarter of homes using satellite services. Total multichannel penetration stood at 86% in 2005, according to FCC data.

Figure 60: Market context - USA

Publicly-funded mixed-genre channels	Main commercial mixed-genre channels (2006 share of viewing, all individuals)	2006 platform penetration	Dedicated children's channels
PBS (viewing share n/a)	ABC (8%), NBC (8%), CBS (8%), FOX (6%), The CW (3%), MyNetwork TV (1%)	Cable – 68% Satellite – 26% DTT – 1% IPTV – 1%	PBS Kids Sprout, Boomerang, Cartoon Network, Discovery Kids, Disney Channel, Funimation Channel, HBO Family, Nick 2, NICK GAS, Nickelodeon, NickToons, Noggin/TheN, StarzKids & Family, Tickle U, Toon Disney

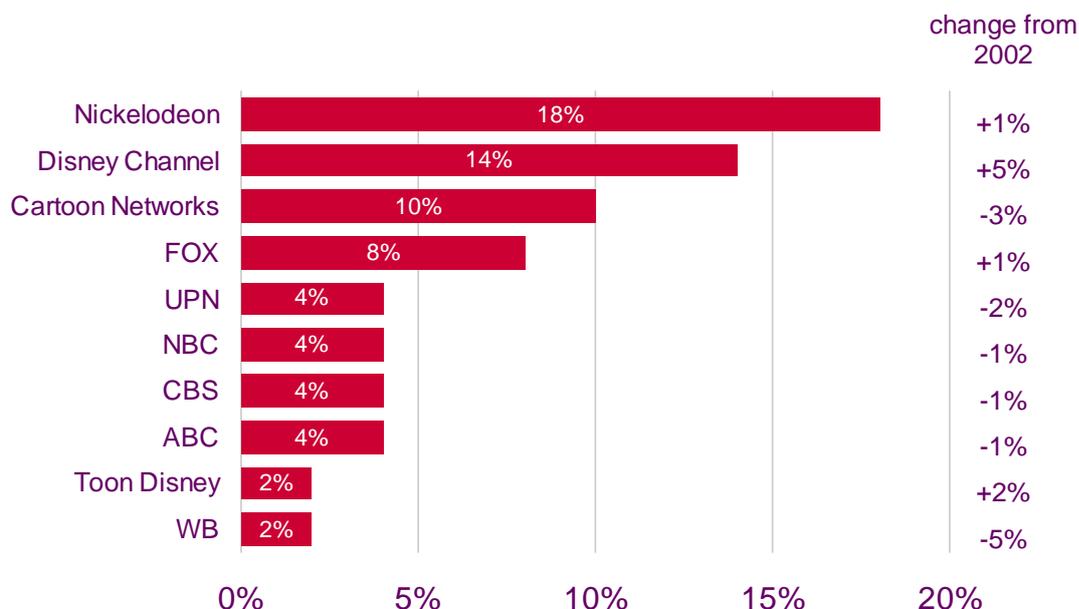
Source: Ofcom research, FCC, Screen Digest, Eurodata TV/Nielsen Media Research USA

7.3. Children's viewing

The US children's television market is dominated by dedicated cable networks. Viacom-owned Nickelodeon, launched in 1979, is a long-time leader in children's TV. In 2006, Nickelodeon had an 18% share of viewing among the 2-11 age group; Disney Channel and Cartoon Networks followed with 14% and 10% respectively. These top three channels jointly commanded 42% of children's viewing in 2006, a slight increase over 2002 (39%).

Most generalist networks also show children's programming. CBS, Fox and NBC all air Saturday morning children's blocks, while ABC's children's programming is provided by Disney. CW, a new network formed by a merger of UPN and WB in September 2006, continues to show the popular Kids WB! block from its predecessor network.

Figure 61: Top 10 channels by share of viewing among 2-11 year olds, 2006



Source: Eurodata TV/Nielsen Media Research Note: CW share for children in 2006 not available, therefore UPN and WB are reported separately on this chart.

The vast majority of children’s viewing on the main mixed-genre networks is to adult genre as shown in Figure 61. In 2006, 12% of children’s viewing on the main channels was of children’s genre programmes, down from 24% in 2002.

Figure 62: Viewing to children’s and non-children’s genre programmes on the main networks



Source: Eurodata TV Worldwide / Nielsen Media Research USA Note: Networks included are ABC, FOX, NBC, CBS, WB, CW, ION.

In addition to commercial channels, PBS – the non-profit public broadcasting television service with 355 local member stations – is active in children’s provision with its PBS KIDS brand. PBS is available in 99% of US households and is funded by a combination of government grants, donations, sponsorship, income from video sales and royalties. PBS KIDS’ mission statement is to make ‘a positive impact on the lives of children through curriculum-based entertainment’; it aims to build children’s knowledge, critical thinking, and to encourage interaction as ‘respectful citizens in a diverse society’¹².

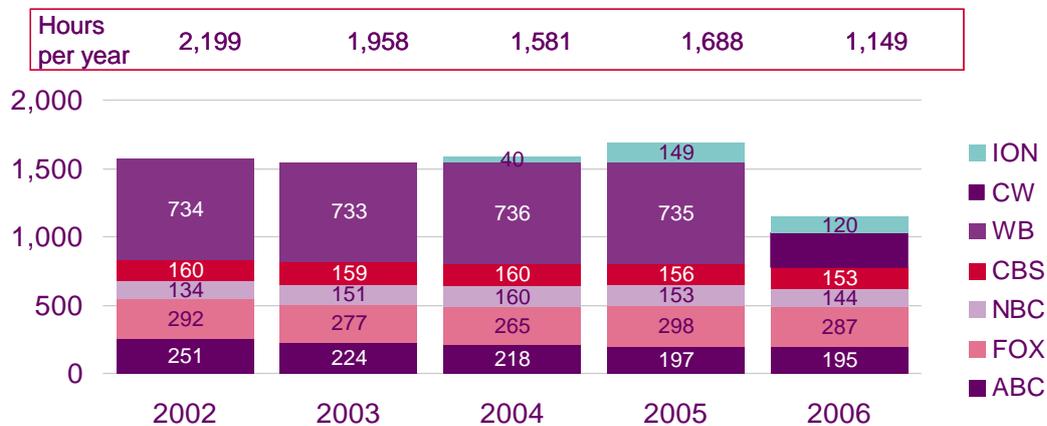
PBS children’s content forms the basis of PBS Kids Sprout, a commercial joint venture with Comcast, HIT Entertainment and Sesame Workshops, launched in 2005. The service offers a 24-hour digital channel available on cable and satellite platforms, and a video-on-demand (VOD) service online.

¹² http://www.pbs.org/aboutpbs/aboutpbs_corp_pbskids.html [accessed 7/09/07]

7.4. Output of children's programmes

Children's output on the main networks has been in decline over the past five years as shown in Figure 62 below. 2006 saw a particular fall, partly as a result of the merger between WB and UPN to create a new network, CW.

Figure 63: Children's output on the main commercial channels



Source: Eurodata TV Worldwide / Nielsen Media Research

In addition to the main commercial channel's output, the non-profit television service PBS airs 2,574 hours of children's programmes per year, according to Screen Digest estimates. Therefore, in total, an estimated 3,723 hours of children's television were shown on the main channels in the USA in 2006.

7.5. Origination

According to Screen Digest estimates, US broadcasters spent in total an equivalent of £183m on new children's programmes in 2006, a 22% decline since 2002. Like other television genres, children's programming in the USA is characterised by a high level of vertical integration. Screen Digest estimates that 80% of all programming was produced in-house by the broadcasters in 2006.

The Walt Disney Company, which operates several children- and family-oriented cable networks (Disney Channel, ABC Family, and Toon Disney) combines production assets (Walt Disney Pictures, Pixar, Miramax and Touchstone Pictures) and distribution (Buena Vista Entertainment, Buena Vista Television). Disney also owns ABC Television and has a dedicated TV studio for children's programmes.

CBS/Viacom is another major vertically-integrated outlet for children's and youth production. While the two companies split into two separate corporate entities on December 31, 2005, they continue to maintain business relationships. Between them, these two companies control major broadcast outlets for children's programming, including CBS, Nickelodeon, NickToon, Nick Jr. and Noggin/The N. The two companies also control major production and distribution houses (Paramount Pictures, Paramount Home Entertainment, and Dreamworks Entertainment), and CBS holds a joint interest in the CW network.

Time Warner, another vertically integrated media outlet, owns the Cartoon Network and several production companies (Warner Bros., New Line Cinema and Castle Rock Entertainment), and has access to the film libraries of MGM, Warner Bros and Hanna-Barbera.

In the recent years, each national network has outsourced its children's programming to its parent company or an independent provider: Disney programmes ABC's Saturday morning; Qubo (an alliance of NBC, Ion Media, Scholastic Entertainment, Classic Media and Nelvana) manages NBC's block; DIC and AOL have contracted to provide CBS' children's shows; 4Kids Entertainment services Fox; Kids' WB appears on the CW network.

According to research carried out by Oliver & Ohlbaum Associates for this project, the high level of vertical integration has meant that the independent production activity for children's programming is relatively low. Among the largest independent producers are Sesame Workshops – a non-profit organisation behind the production of several educational children's programmes such as *Sesame Street* and *Dragon Tales*, broadcast around the world.

DIC Entertainment is another major producer, with the world's third largest Western-style animation library of programming hours after Warner Brothers and Disney. Programming strands produced by DIC include *Trollz*, *Strawberry Shortcake* and *Sherlock Holmes in the 22nd Century*. Scholastic, with strands such as *Maya and Miguel*, *Clifford The Big Red Dog* and *Goosebumps* is another major player, combining television production with educational and children's book publishing.

7.6. Public intervention in children's TV

Public intervention in the children's television sector in the USA focuses on supporting the provision of educational programming for children. The Children's Television Act (CTA), adopted in 1990, sets out a guideline for television stations to air three hours per week of educational and informational programming aimed at children. This is defined as any television programming that furthers the education and informational needs of children 16 years of age and under in any respect, including the child's intellectual/cognitive and social/emotional needs. In enacting the CTA, Congress found that market forces would not provide a sufficient amount of such programming.

In 1996 the FCC introduced more detailed rules for core educational and informational programmes, as follows:

- the programme has education as a significant purpose;
- the educational objective of the programme and the target child audience are specified in writing in the children's programming report;
- the programme is aired between the hours of 7:00 a.m. and 10:00 p.m.;
- the programme is regularly scheduled; and
- the programme is at least 30 minutes long

The programme is identified as educational children's programming at the time it is aired (with an E/I icon appearing on screen), and instructions for listing it as educational programming are provided by the licensee to programme guides, specifying the age group for which the programme is intended.

Since January 2007, the three hour children's programming guideline has also applied to broadcast television stations' digital streams, including up to an additional three hours per week for each additional 24-hour free multicast stream. There are no statistics on the impact these rules have had on the amount of new children's TV produced.

Public funding for children's television in the USA is relatively small. The Corporation for Public Broadcasting, which partly funds PBS, received a five year grant of \$72m (£40m) in 2005 from the US Department of Education as part of its Ready to Learn initiative. The grant called for well-researched educational content for both traditional and new media platforms, to promote literacy skills among low-income children aged 2-8. The National Science Foundation runs an "Informal Science Education" programme. There are no tax benefits targeted at television production in the USA.

Figure 64: Summary – public intervention in children’s television

Publicly-funded broadcaster	Non-profit broadcaster PBS funded by a combination of government grants, donations, sponsorship, income from video sales and royalties; focuses on curriculum-based entertainment. In collaboration with commercial players, PBS has launched a digital channel and a VOD service.
Output and investment requirements	Guidelines for all television stations to provide three hours per week of educational and informational programming for children.
Direct public funding	Low
Tax benefits	None
Advertising limits	Advertising during programmes targeted at an audience of children 12 years old and younger is limited to 12 minutes per hour on weekdays and 10.5 minutes per hour on weekends.

Annex E.1: Canadian broadcasters' obligations in relation to children's programming

Publicly-funded generalist channels	<ul style="list-style-type: none"> • CBC expected to broadcast a minimum of 15 hours per week for children and five hours per week for Youth; • SRC required to broadcast an average of at least four hours per week of original Canadian children's programming and expected to broadcast a minimum of 20 hours per week for children and youth
Provincial educational channels	<ul style="list-style-type: none"> • TVO/TFO expected to broadcast 70 hours per week of educational programming dedicated to Children; • TFO committed to broadcast at least 29 hours per week of Canadian programming for children (ages 2 to 12) and at least 10 hours per week of programming for youth (12 to 17) • Télé-Québec required to broadcast an average of 21 hours per week of Canadian programming targeted to children ages 2 to 11 • SCN dedicates approximately 4% of broadcast schedule to children's programs • Knowledge Network expected to broadcast 54 hours per week of children's and youth programs
National private networks	<ul style="list-style-type: none"> • CTV expected to broadcast 2.5 hours per week of programming for children • CanWest MediaWorks Inc. expected to continue to provide children's programming and committed to maintaining children's programming within its broadcast schedule • TVA not required to broadcast a minimum level of children's programming
Cable and satellite	<p>YTV</p> <ul style="list-style-type: none"> • Required to devote 30% of broadcast schedule to programming directed at children up to five years of age, 48 %directed at children and youth aged 6 to 17, and 22 %directed to families • Required to distribute 90 hours of original, first-run, independently produced Canadian programming each year • Required to spend 40% of annual revenues on acquiring and investing in Canadian programming; allocate one-third of this amount to the development, production and licensing of original, first-run Canadian programming • Required to devote 60% of broadcast schedule to the exhibition of Canadian content <p>Family Channel</p> <ul style="list-style-type: none"> • Required to devote 25% of broadcast schedule to the exhibition of Canadian programming that shall have as its target audience only children, youth to age 17, and families in conjunction with such children and youth. • Required to spend 30% of revenues on the acquisition of Canadian programming that shall have as its target audience only children, youth to age 17, and families in conjunction with such children and youth
Cable and satellite	<p>VRAK.TV</p> <ul style="list-style-type: none"> • Required to broadcast programming that has as its target audience children and youth up to 17 years of age • Required to distribute 104 hours of original, first-run, independently produced programming per year • Required to spend 41% of annual revenues on acquiring and investing in Canadian programming • Required to devote 50% of broadcast schedule to the exhibition of Canadian content <p>Teletoon/Télétoon</p>

- Required to spend 47% of revenues on the acquisition of Canadian programming
- Required to allocate 50% of this amount to programming made by non-related producers
- Expected to ensure that 75% of all broadcast Canadian programming is from independent producers
- Required to devote 60% of broadcast schedule to the exhibition of Canadian content
- Committed to commissioning 700 half-hours of new Canadian production, each available in English and French, over the term of the licence

Treehouse

- Required to broadcast programming for pre-school children up to six years of age between the hours of 6:00 a.m. and 9:00 p.m.
- Required to spend 36% of revenues on the acquisition of and/or investment in Canadian programming
- Required to devote not less than 70% of broadcast schedule to the exhibition of Canadian content
- Expected to commission 325 half -hours of original Canadian production over the term of the licence

Discovery Kids

- Required to broadcast programming targeted at “children of all ages”
- Required to devote not less than 35% of broadcast schedule to the exhibition of Canadian content

BBC Kids

- Required to devote 65 %of broadcast schedule to programming that targets children ages 2 to 11 (the majority of which will target children ages 6 to 11) and 35 %to youth ages 12 to 17
- Required to devote not less than 35 %of broadcast schedule to the exhibition of Canadian content

Source: CFTPA, February 2007

Annex E.2: Data sources

1.1 Basic data points

Number of children

	UK	France	Germany	Sweden	Australia	Canada	USA
Children (m)	11.6m	12m	12.6m	1.4m	4m	5.7m	60.7
Age	0-14	0-15	0-15	0-15	0-15	0-14	0-15
Source/period	ONS/ 2004	Zenith/2006	Zenith/2006	Zenith/2006	Zenith/2006	Zenith/2006	US Census Bureau/2007

Source: ONS population estimates for the UK; US Census Bureau for the USA, other country data from Zenith pocket book series: Americas Market and Mediafact, Asia Pacific Market and Mediafact, Western Europe Market and Mediafact.

Age brackets used in viewing data

	UK	France	Germany	Sweden	Australia	Canada	USA
Children	4-15	4-14	3-13	3-14	0-14	2-11	2-11
All individuals	4+	4+	3+	3+	All	2+	2+
Data source	BARB	Mediametrie	Mediametrie	Mediametrie and SVT	ACMA and OZTAM	BM-NMR Metered Data, CRTC, Mediametrie	Mediametrie

Exchange rates

Constant average 2005 exchange rates have been applied to all currency conversions as shown in table below.

	1€	1SEK	1A\$	1C\$	1US\$
1£	0.684	0.075	0.419	0.454	0.55

Source: PWC Global Entertainment and Media Outlook 2006

Viewing data

The majority of data on channel viewing shares was provided by Eurodata TV based on national measurement systems, as follows:

France: Eurodata TV/Médiamétrie – Médiamat. Data on cable and satellite shares from Médiamétrie/MédiaCabSat - L'audience des chaînes du câble de Canalsat et de TPS du 1er janvier au 17 juin 2007

Germany: Eurodata TV/AFG – GfK

Sweden: Eurodata TV/MMS Mediamätning I Skandinavien AB. Data on dedicated children's channel shares was provided by the public broadcaster SVT.

Australia: Data on viewing by type of channel was provided by ACMA based on OZTAM.

Canada: Eurodata TV/BBM Canada. Data on children's viewing by type of channel was provided by CRTC based on BBM-NMR.

USA: Eurodata TV/NMR USA

Multichannel penetration

Platform penetration 2002 and 2006: Screen Digest – global television intelligence database for France, Sweden, Australia, Canada and the USA. For Germany, data from a report by ALM/ (GSDZ) *Digitisation of the German television market, July 2007*

Total multichannel penetration: France - Médiamétrie - *MédiaCabSat – Janvier/Juin 2007*; Germany - ALM/ (GSDZ) *Digitisation of the German television market, July 2007* Australia – ACMA *Communications Report 2005/06*

All UK data from Ofcom Market Intelligence and refers to penetration on the main television set.

Broadcaster spend

UK data from broadcaster returns. Other country estimates from Screen *Digest The Business of Children's Television* (3rd edition - 2007)

1.2 Other sources

Please note that a broad variety of publicly available sources informed our research effort; the list below contains references for data points included in the report. All internet links were valid at the time of publication.

European Union

European Commission – 6th *Communication from the commission to the Council and the European Parliament on the application of Articles 4 and 5 of Directive 89/552/EEC "Television without Frontiers", as amended by Directive 97/36/EC, for the period 2001-2002.*

France

Centre national de la cinématographie (CNC)

- *La production cinématographique en 2006*
<http://www.cnc.fr/Site/Template/T1.aspx?SELECTID=2540&ID=1671&t=1>
- *Les interventions du CNC dans l'animation en 2006*
<http://www.cnc.fr/Site/Template/T1.aspx?SELECTID=2639&ID=1756&Type=0&Annee=0&t=1>

Conseil supérieur de l'audiovisuel (CSA) *Broadcaster reports for 2005*
http://www.csa.fr/infos/publications/publications_televisiion.php?cat=9

Germany

Association of regulatory authorities (ALM) www.alm.de

- *ALM/Commission on Digital Access (GSDZ) Digitisation of the German television market*
- *ALM/GöfaK Medienforschung ALM Programmbericht Fernsehen in Deutschland 2005*

ARD *Media Perspektiven - Medien Basisdaten*. Media information database available online <http://www.ard.de/intern/basisdaten/-/id=8192/version=5/so3vlp/index.html>

Sweden

Kent Asp - Svenskt TV-Utbud - Report series produced for Granskningsnämnden (GRN) http://www.grn.se/grn/pages/Page_1009.aspx

Australia

Australian Broadcasting Corporation (ABC) - Annual reports http://www.abc.net.au/corp/annual_reports/arindex.htm

Australian Communications and Media Authority (ACMA)

- *Children's Television Standards 2005*
http://internet.aca.gov.au/webwr/_assets/main/lib310132/childrens_tv_standards_2005.pdf
- *Children's Television Standards Review - Children's Television Production Project*
http://internet.aca.gov.au/webwr/_assets/main/lib310132/childrens_television_production_project.pdf
- *Communications Report 2005-06*
http://www.acma.gov.au/WEB/STANDARD/pc=PC_300375

Australian Film Commission (AFC) – National Survey of Feature Film and TV Drama Production 2005/06 <http://www.afc.gov.au/downloads/pubs/nps.pdf>

Canada

Canadian Film and Television Production Association (CTFPA) *The Case for Kids Programming - Children's and Youth Audio-Visual Production in Canada. February 2007*. Report in association with Shaw Rocket Fund, Alliance for Children and Television and National Film Board of Canada. Prepared by Nordicity Group Ltd, February 2006.
<http://www.cftpa.ca/news/press/cftpakidsfinalfacing.pdf>
<http://www.cftpa.ca/news/press/cftpakidsfinalfacing.pdf>

Canadian Radio-television and Telecommunications Commission (CRTC)

- *Broadcasting Policy Monitoring reports 2005/06*
- *Annual reports to CRTC Canadian Broadcasting Corporation (CBC) / Société Radio-Canada (SRC) 2005/06* .

USA

Federal Communications Commission (FCC)

- *Annual Assessment of the Status of Competition in the Market for the Delivery of Video Programming, March 2006* http://fjallfoss.fcc.gov/edocs_public/attachmatch/FCC-06-11A1.doc
- *Information on children's educational television obligations*
<http://www.fcc.gov/mb/policy/kidstv.html>

PBS *PBS KIDS® Backgrounder & Facts*

http://www.pbs.org/aboutpbs/aboutpbs_corp_pbskids.html