

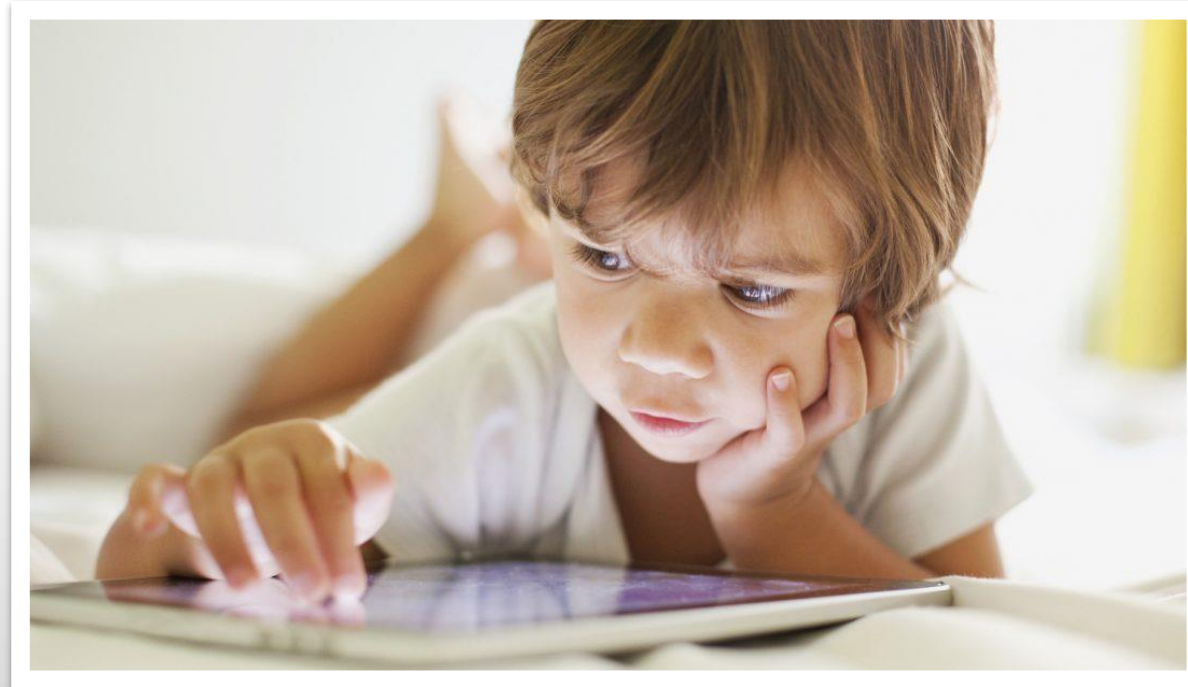
The Future of Children's Entertainment: Trends and changes in Turkish and International markets

Ampere Analysis

November 2018



What and where are kids watching TV?

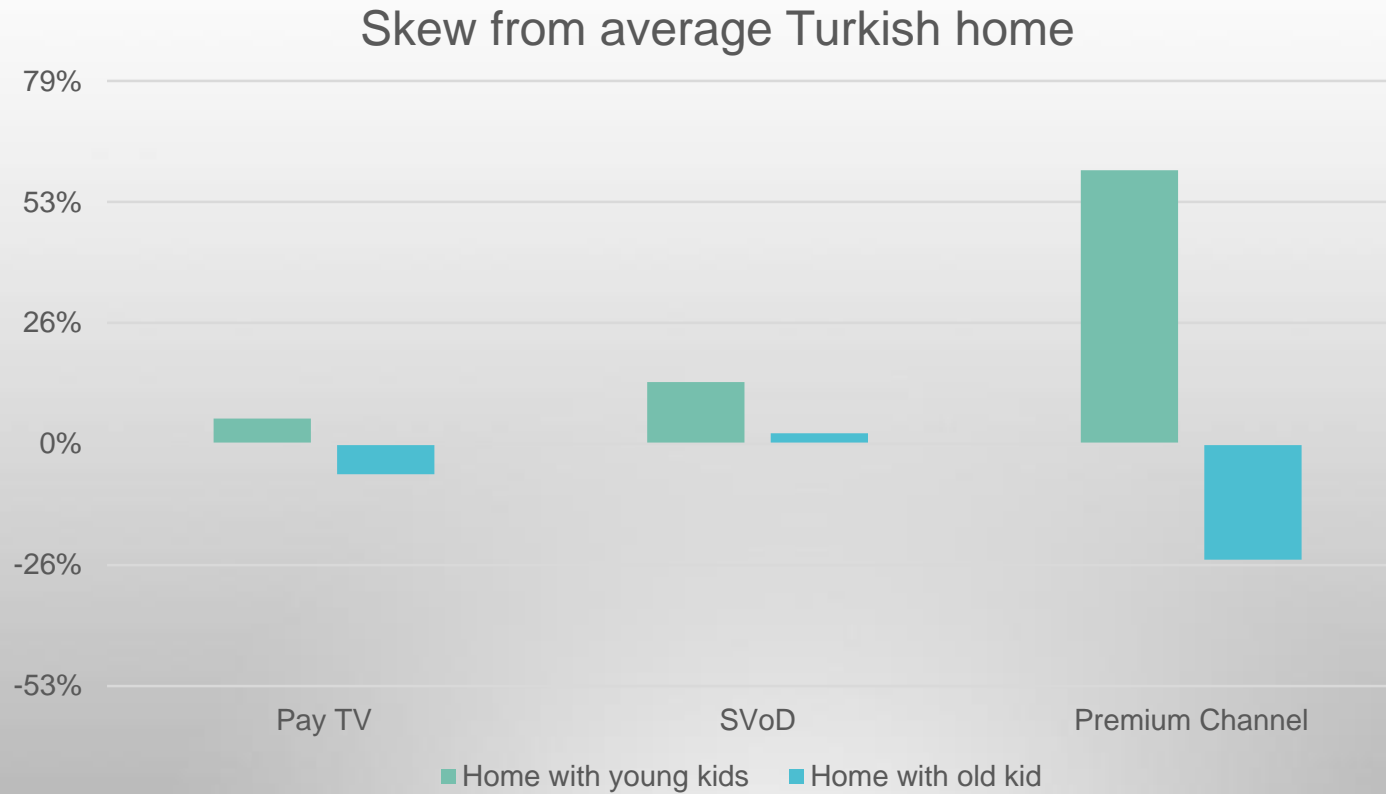


TRT ULUSLARARASI
**ÇOCUK
MEDYASI**
KONFERANSI
2018



TRT INTERNATIONAL
**CHILDREN'S
MEDIA**
CONFERENCE
2018

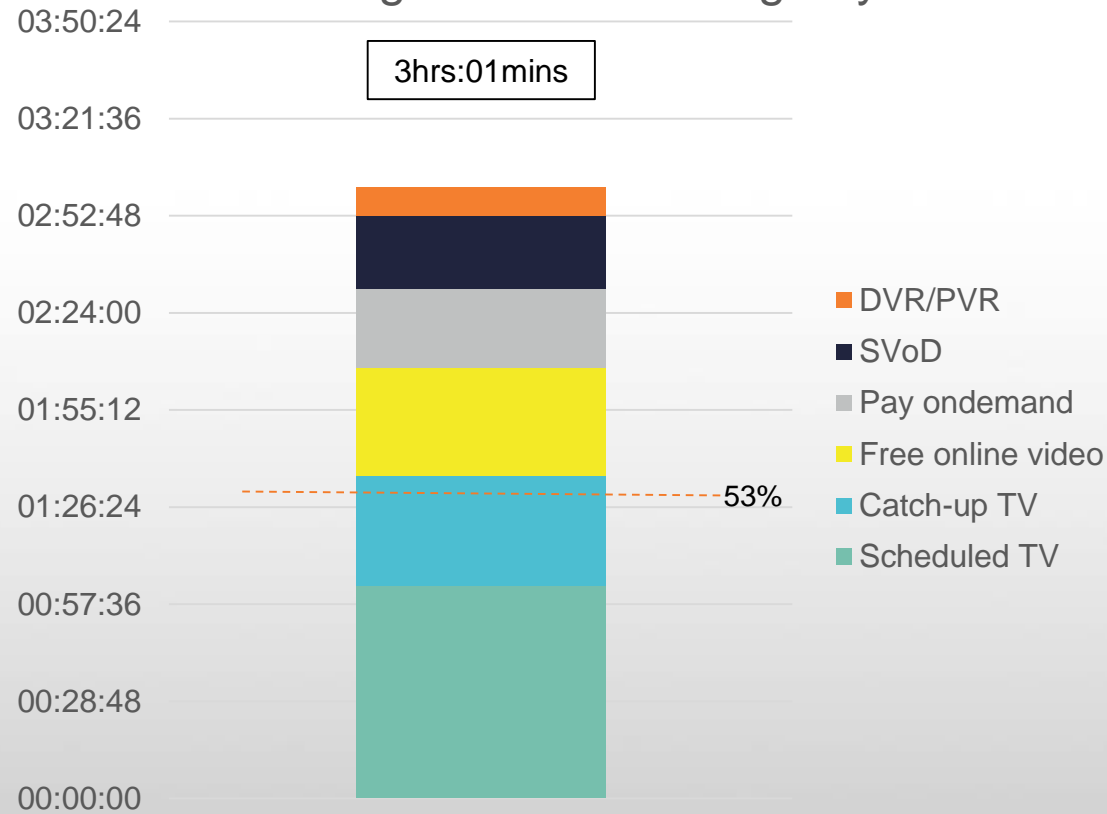
Homes with young kids are much more likely to take all forms of paid TV service



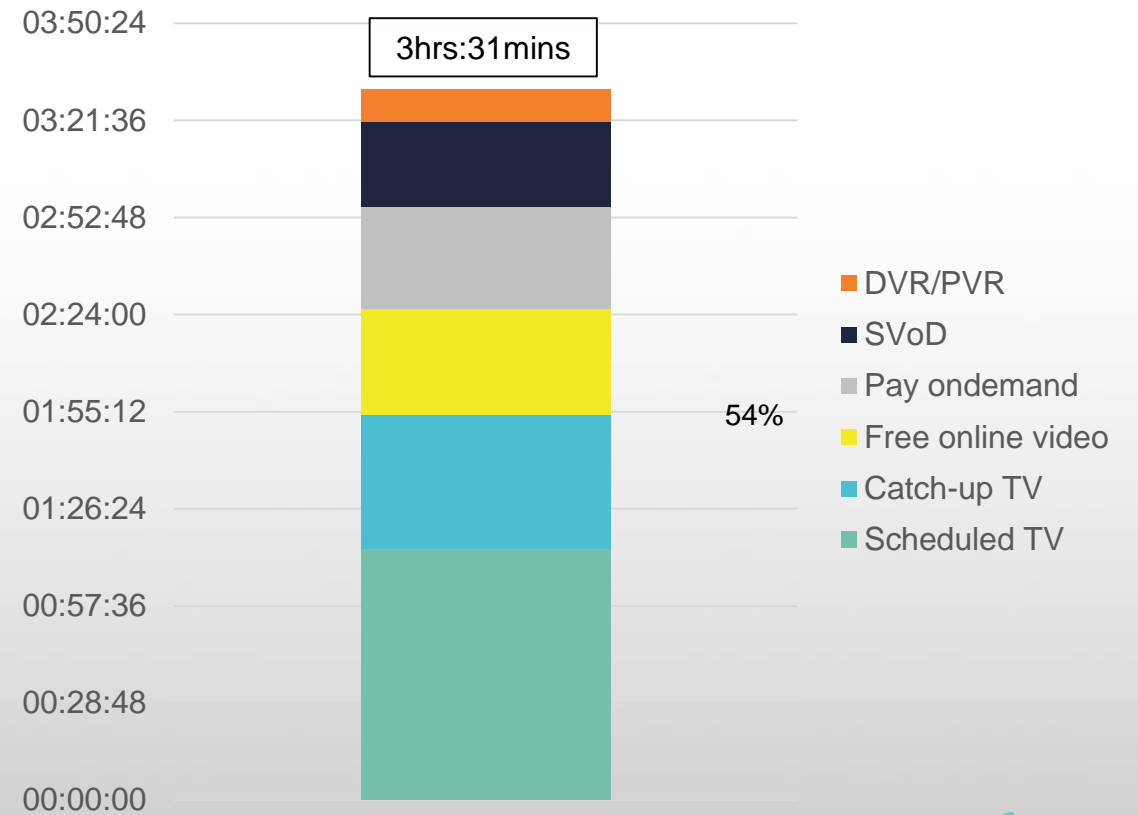
Ampere Consumer. Q3 2018. Shows % skew away from average home for uptake of stated service.

But are kids turning away from TV?

Average Turkish viewing day



Turkish homes with young kids

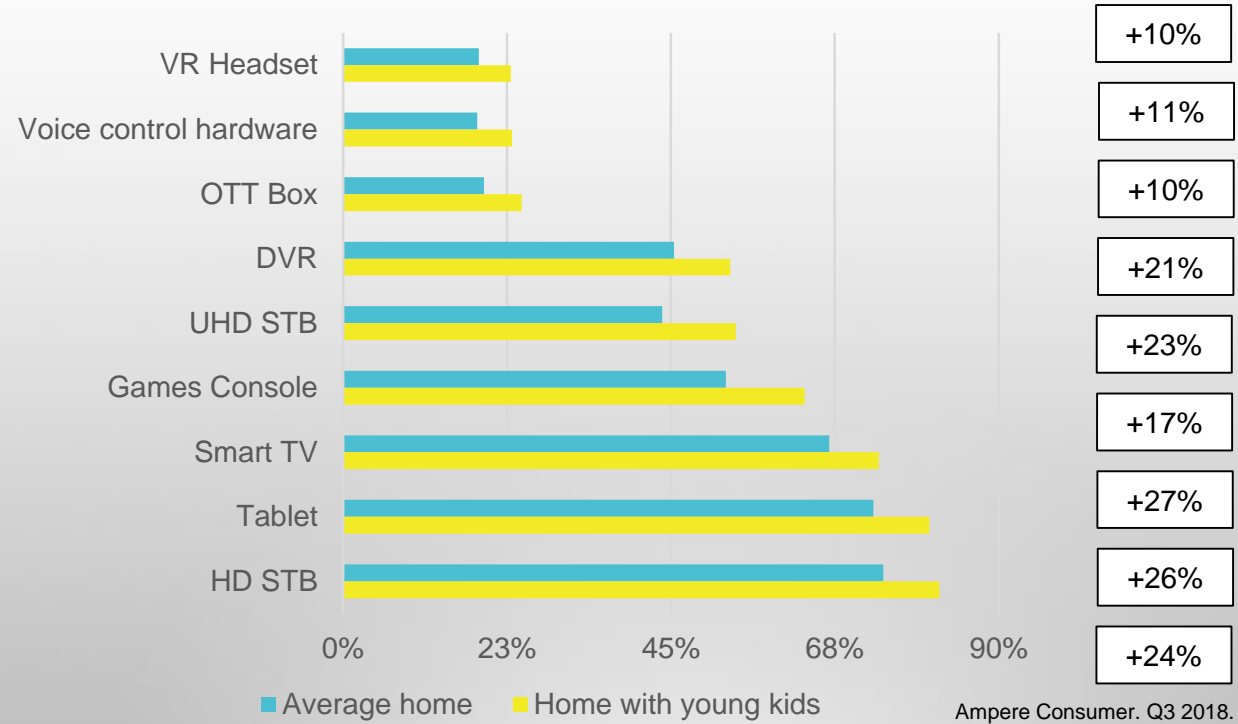


Turkish homes with kids actually watch more TV, and just as much TV from 'traditional' sources...but their 'other' viewing is increasingly reliant on time-shift and on-demand

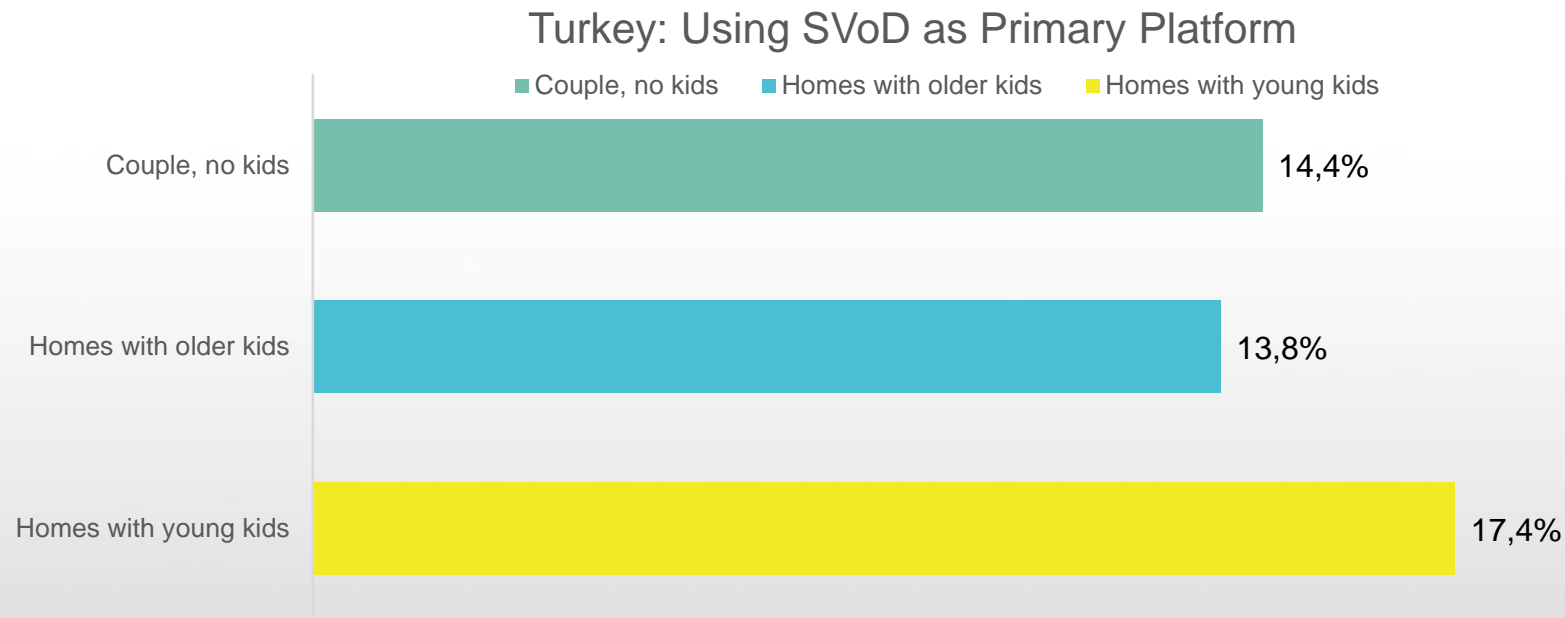


One reason for this is that kids have always driven early-adoption of tech

Turkish device environment

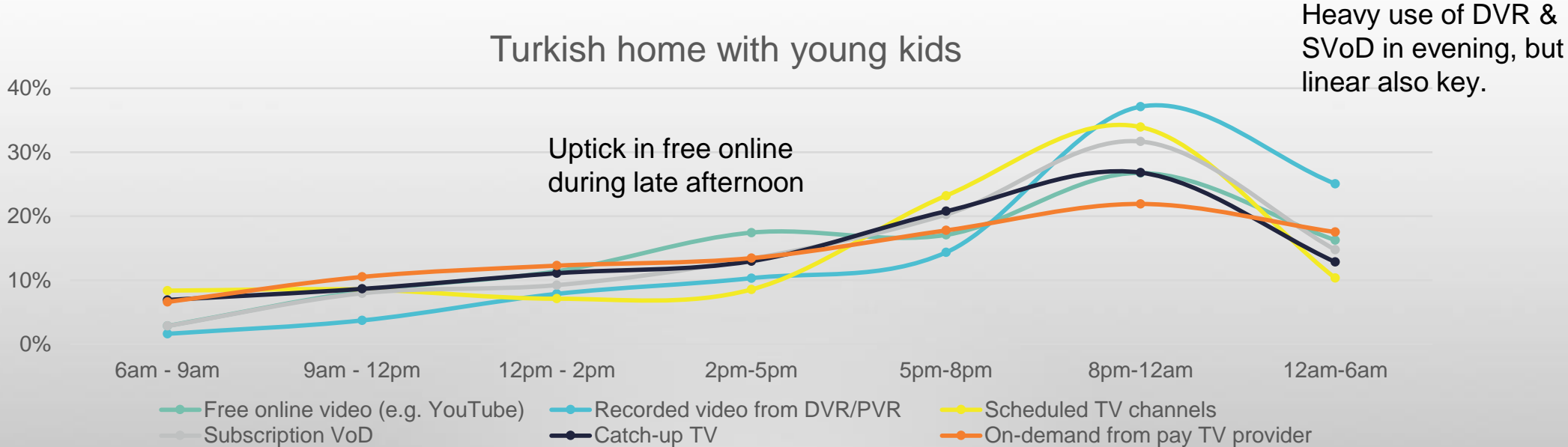


But....more homes with young kids are substituting main TV



Ampere Consumer. Q3 2018. Turkey

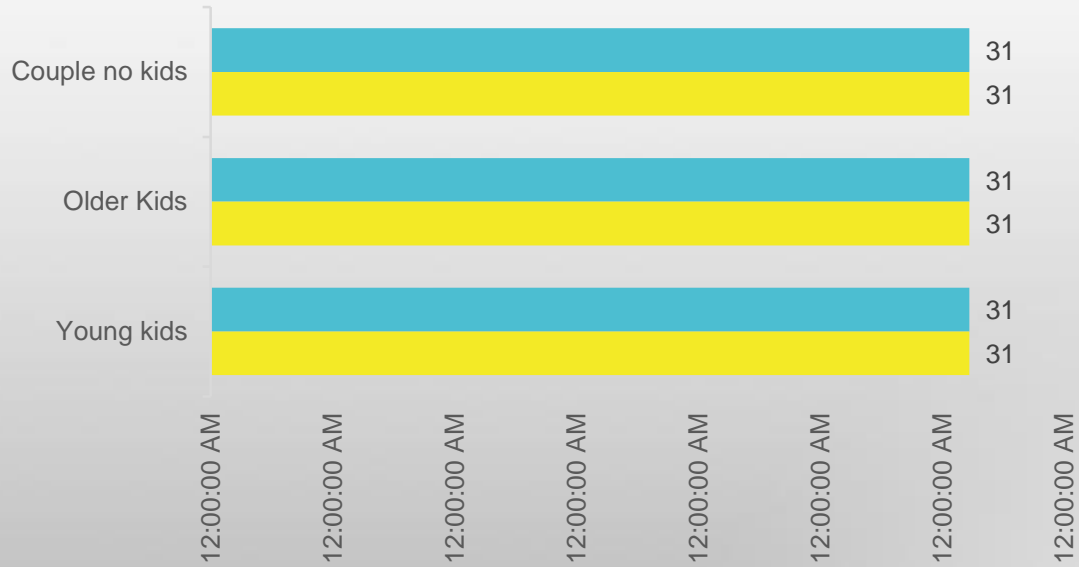
Homes with young kids time shift in primetime using SVoD and DVR



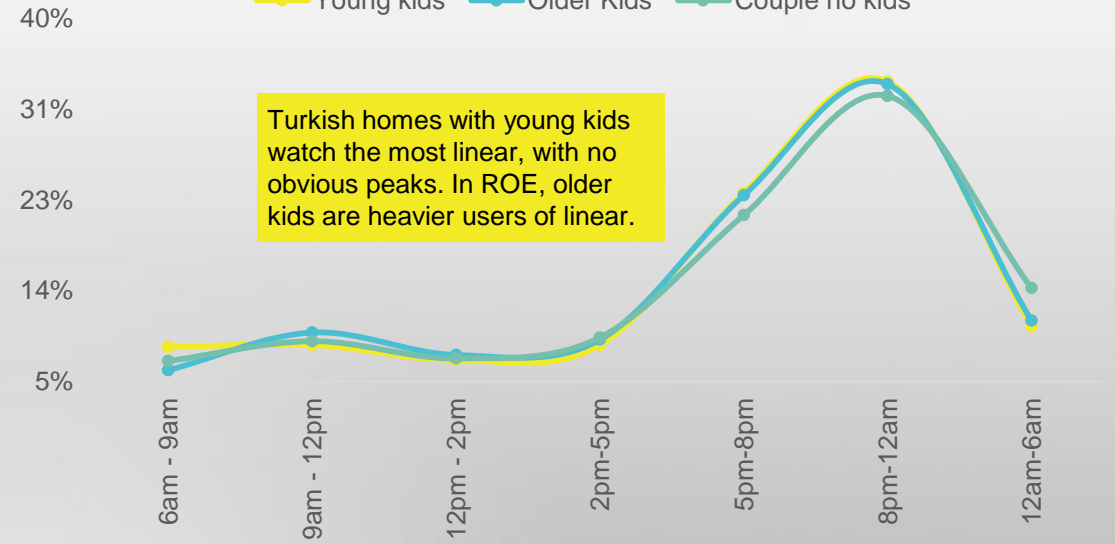
Ampere Consumer. Q3 2018. Shows all viewing on device in a given day as a proportion of all time spent viewing on that device. A peak higher than another does not indicate more viewing, but does show that the stated device as a peak in use at that time.

Scheduled TV: Turkey bucks the trend with young kids still focused on linear

Time Watching Scheduled TV (Turkey vs. Rest of Europe)



Scheduled TV Viewing Patterns (Turkey)

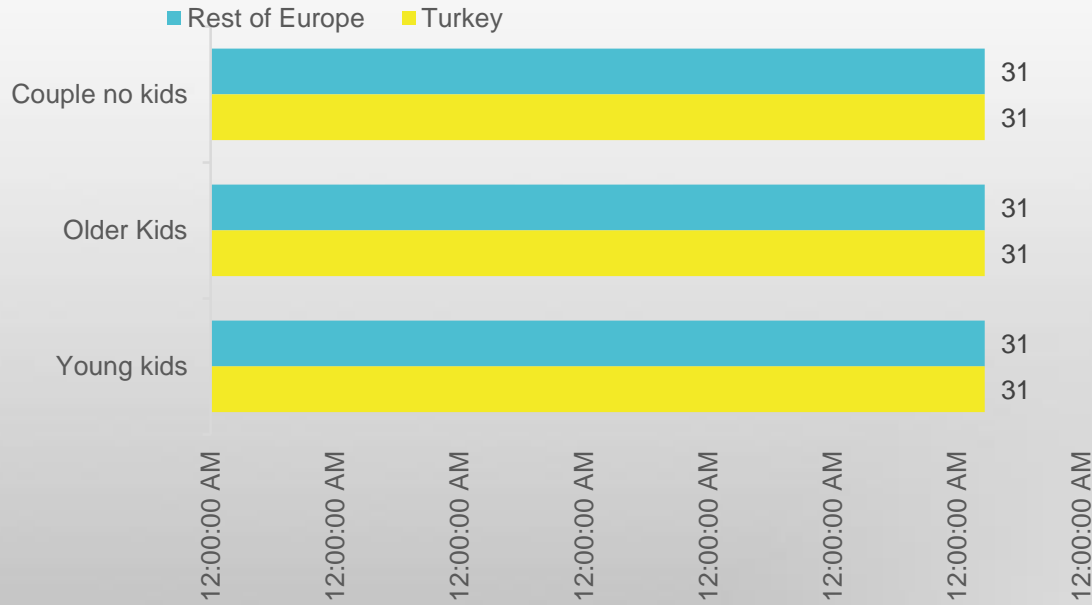


Viewing pattern line graph shows 100% of daily viewing of type specified. This is designed to show patterns of usage rather than overall time spent watching. A peak above another form of viewing does not necessarily indicate greater viewing time.

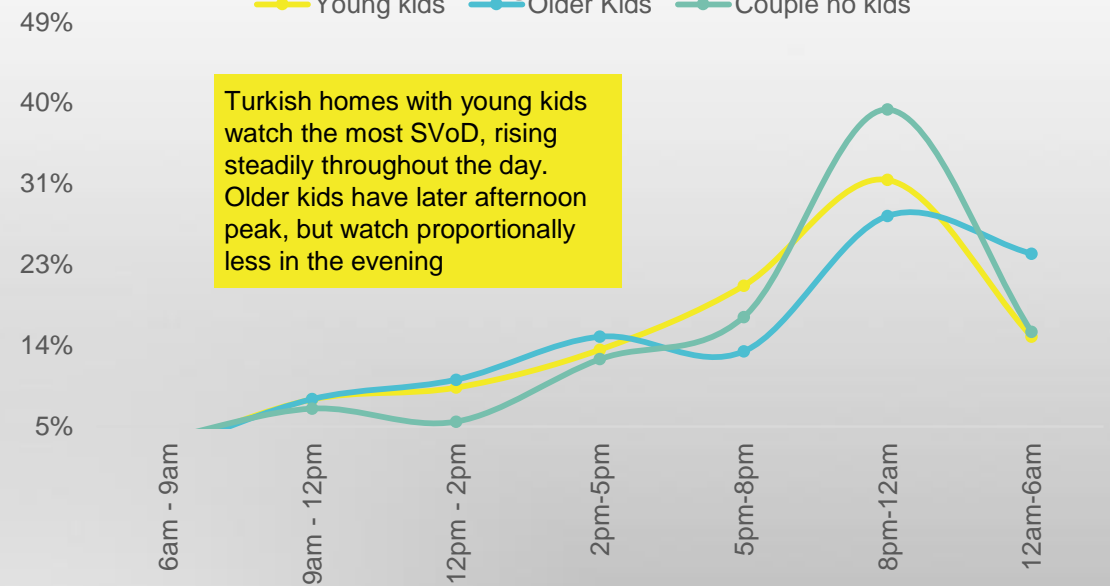
SVoD: Young kids watch the most SVoD, engaging throughout the day



Time Watching SVoD (Turkey vs. Rest of Europe)

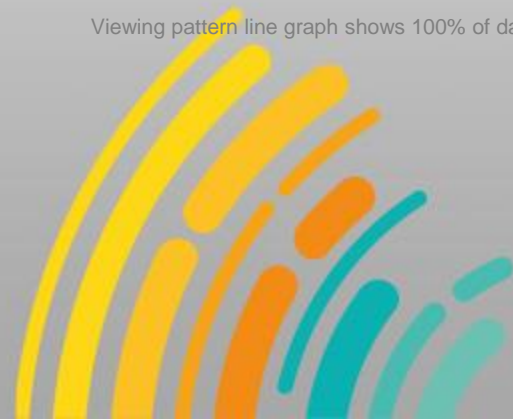


SVoD Viewing Patterns (Turkey)



Turkish homes with young kids watch the most SVoD, rising steadily throughout the day. Older kids have later afternoon peak, but watch proportionally less in the evening

Viewing pattern line graph shows 100% of daily viewing of type specified. This is designed to show patterns of usage rather than overall time spent watching. A peak above another form of viewing does not necessarily indicate greater viewing time.



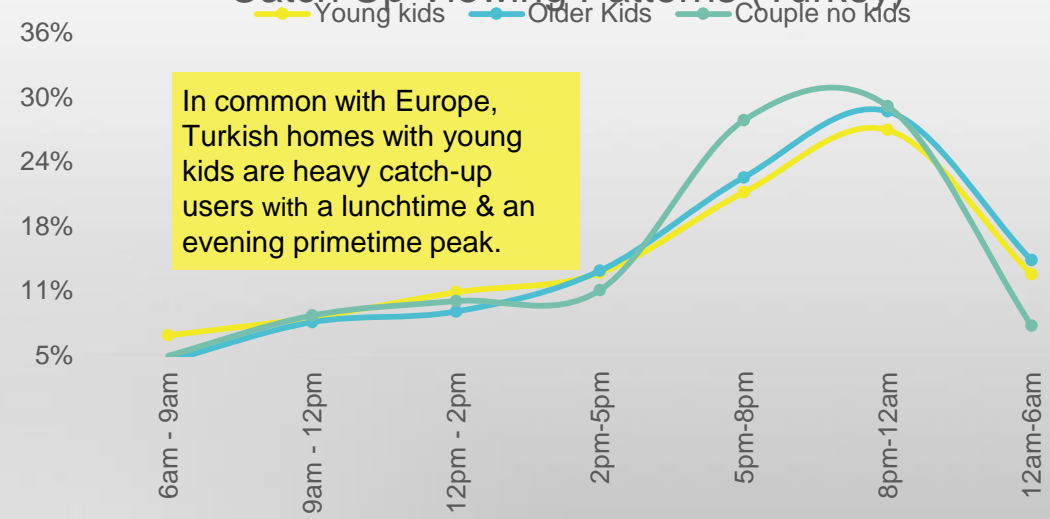
Catch-up: Catch-up TV is used heavily in Turkish kids' homes



Time Watching Catch Up (Turkey vs. Rest of Europe)



Catch Up Viewing Patterns (Turkey)

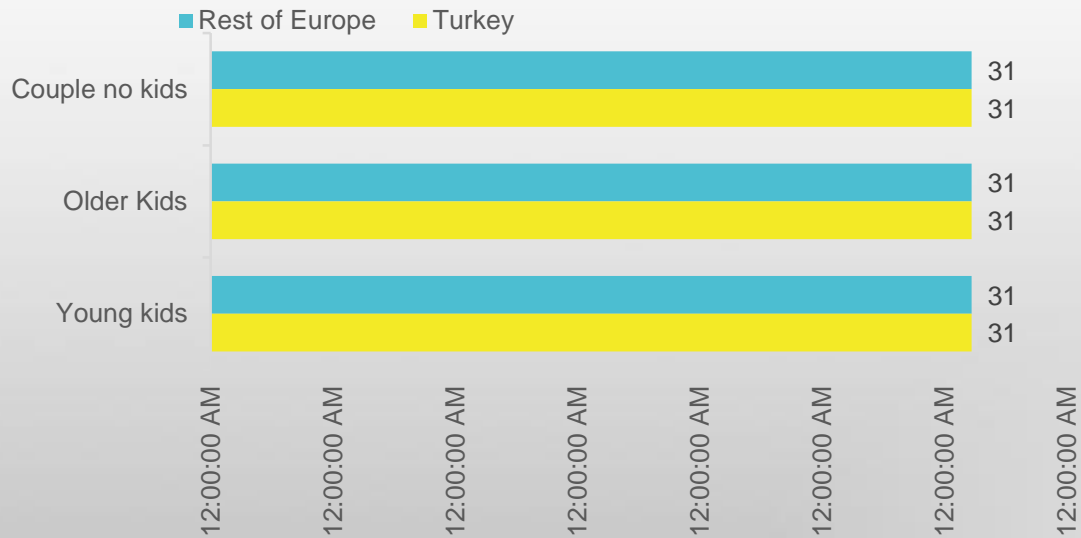


Viewing pattern line graph shows 100% of daily viewing of type specified. This is designed to show patterns of usage rather than overall time spent watching. A peak above another form of viewing does not necessarily indicate greater viewing time.



Online: Turkish kids' homes consume double the online volume of rest of Europe, with three 'primetimes'

Time Watching Online (Turkey vs. Rest of Europe)



● Young kids ● Older Kids ● Couple no kids

Free online viewing Patterns (Turkey)



Viewing pattern line graph shows 100% of daily viewing of type specified. This is designed to show patterns of usage rather than overall time spent watching. A peak above another form of viewing does not necessarily indicate greater viewing time.

Mapping the viewing day: Turkish homes with young or older kids



DVR, Linear, SVoD

Young Kids

Catch-up




Breakfast

Free online



Morning

Catch-up



Lunchtime

Free online



Afternoon



Evening

Older kids

Free online



Scheduled



Free online



SVoD



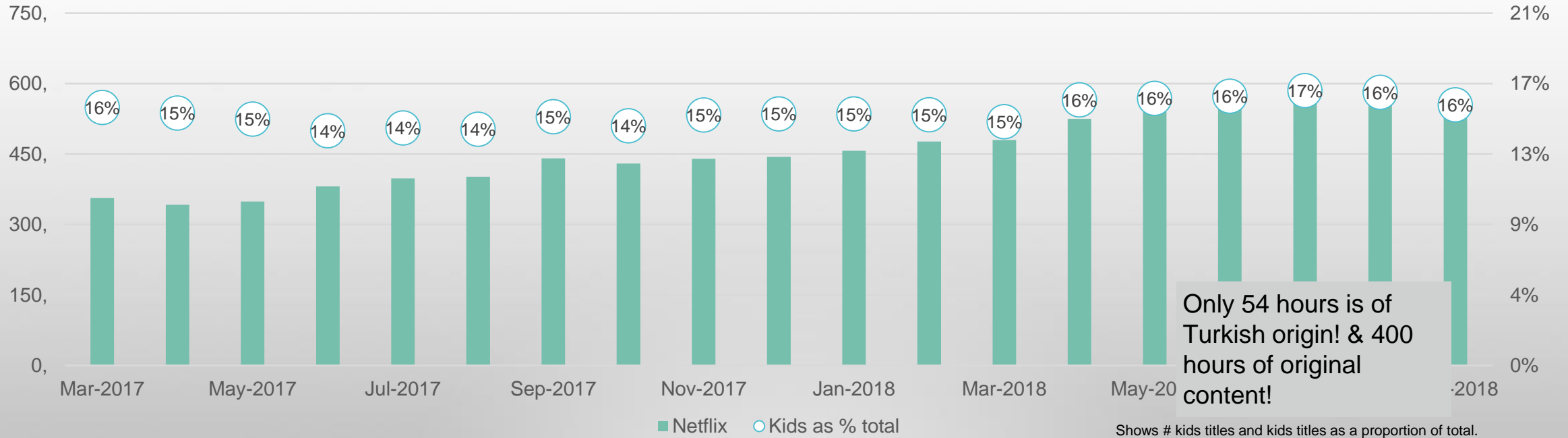
Linear, online



Kids TV Content Trends

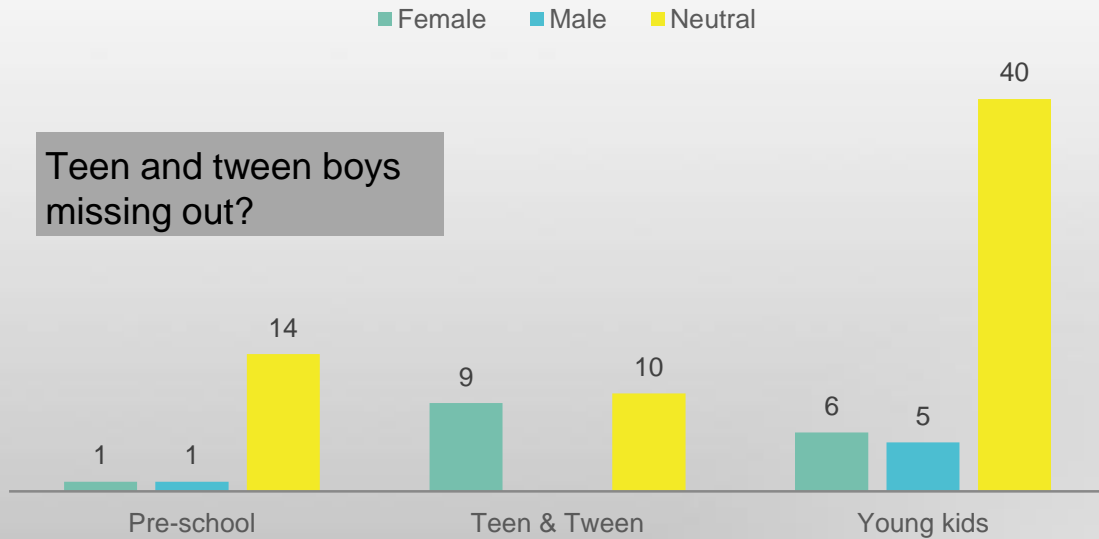


Turkey: Kids content on Netflix has been rising steadily inline with other content



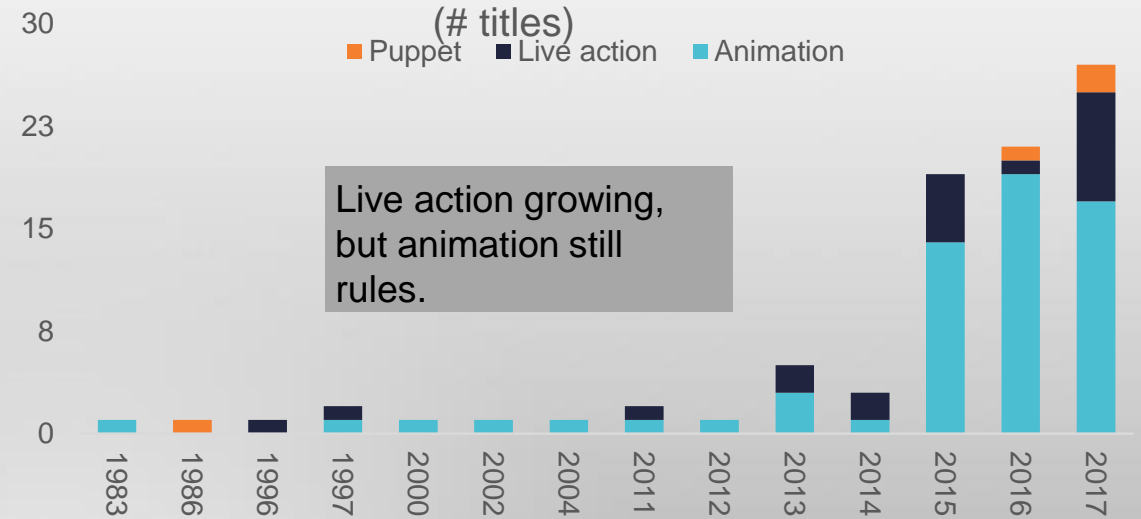
SVoD originals focus on young kids, with live action a growing niche

SVoD Kids' Originals: Gender Focus by Age (# titles)



Teen and tween boys missing out?

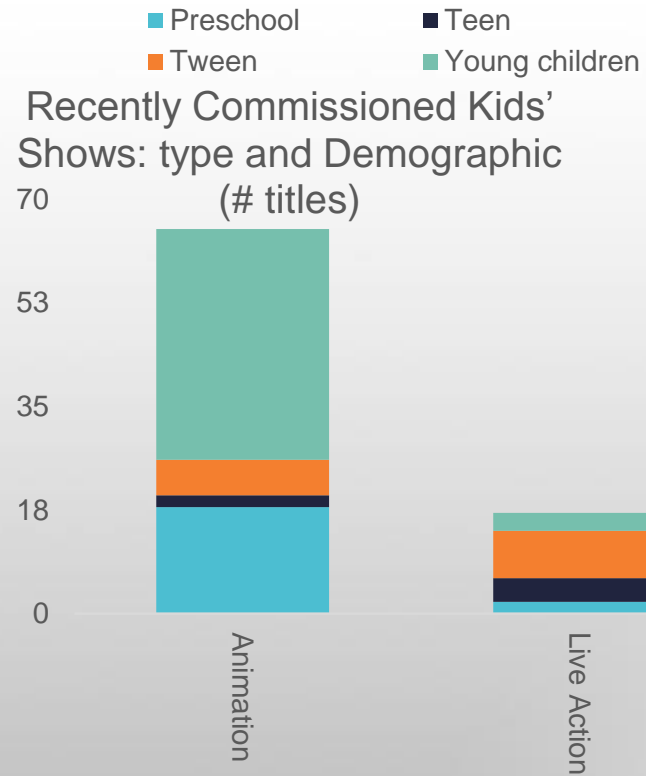
SVoD Kids' Originals: Change in Type Over Time (# titles)



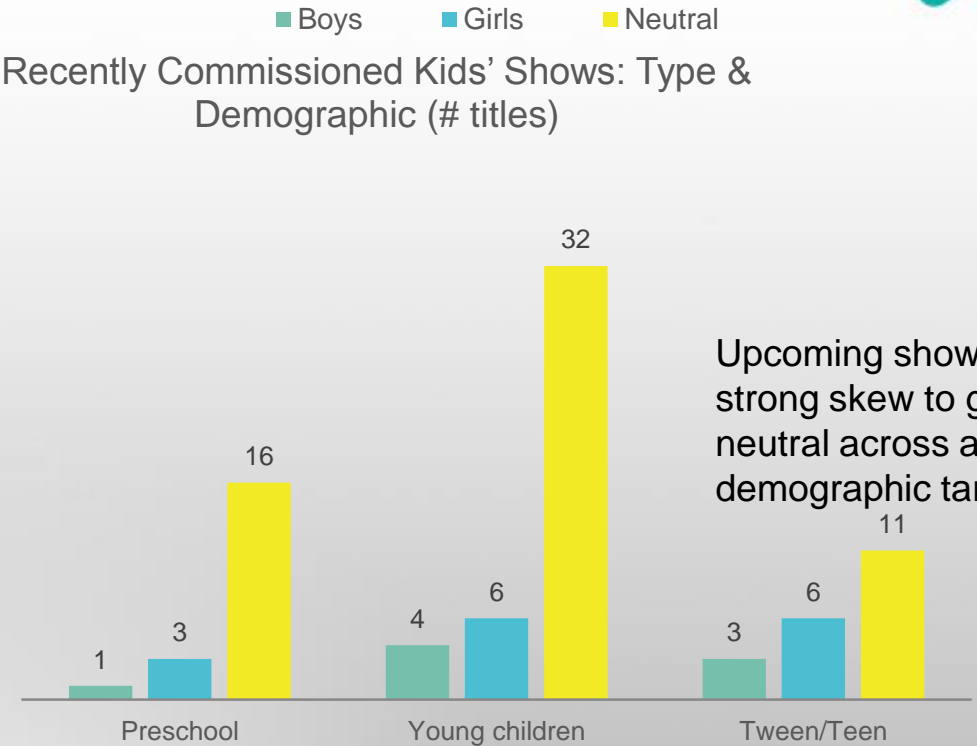
Live action growing, but animation still rules.

Ampere Analytics. Based on all SVoD kids original content produced by any SVoD platform as of first half 2018.

Across linear and SVoD, gender-neutral is now key



Recently Commissioned Kids' Shows: Type & Demographic (# titles)



Upcoming shows: Very strong skew to gender neutral across all demographic targets.

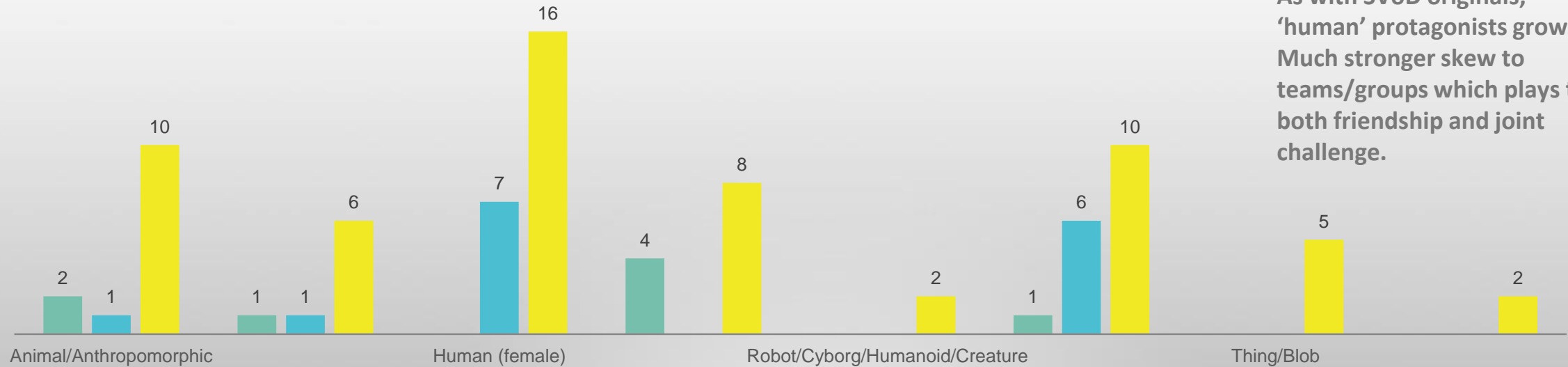
Based on all upcoming (in production or development) kids content tracked in Ampere Commissioning for linear and digital platforms. As of first half 2018.

And friendship and other 'groups' increasingly important leads



Recent Commissions: Key Protagonist (# titles)


■ Boys ■ Girls ■ Neutral



As with SVoD originals, 'human' protagonists growing. Much stronger skew to teams/groups which plays to both friendship and joint challenge.


Based on all upcoming (in production or development) kids content tracked in Ampere Commissioning for linear and digital platforms. As of first half 2018.





Acting on data insight: global platforms provide unique 'edutainment' opportunity

Sky Kids research found that children will re-watch their favourite show 53 times in a year....







Video clips credits:

Alisa Knows What to Do! –Bazelevs (producer) /Mirsand Ltd (distributor)

<http://www.mirsand.com.cy/>



A few things to think about

- The home environment for children has evolved significantly in the past two years: Young kids' households are still more likely to have traditional pay TV than homes with older kids or childless homes, but the likelihood of having SVoD is only slightly elevated (homes with younger kids had been early adopters, but the increasing ubiquity of SVoD has ironed out the difference).
- Crucially, however, the shift to non-linear viewing in homes with younger kids' remains very significant and young kids' homes are far more likely to be substituting for SVoD as a main form of TV.
- Homes with young kids also spend much more time each day watching SVoD and other non-linear forms of TV with viewing patterns that show significant usage of SVoD between 9am and 5pm, as well as during primetime.
- Catch-up TV is becoming increasingly important for homes with younger kids, particularly in primetime, while online video is used heavily throughout the afternoon and into primetime.



A few things to think about

- Generally there remains significant opportunity to produce more original content for SVoD, with SVoD platforms still heavily skewed to acquisition over commission for kids content.
- In terms of content development for all platforms (including linear), stories that centre on a family, team or group as the lead 'character' rather than an individual are an increasingly important area to explore.
 - Themes of friendship and magic are growing areas for exploitation.
- Overall there is a move to more gender-neutral content outside of pre-school across content for young kids, teens and tweens. But we expect an on-going focus on strong female leads to also be an on-going trend.
- Amazon emerging as key buyer in SVoD space. Friendship & adventure themes prevail.



Teşekkürler



guy.bisson@ampereanalysis.com

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