



OBSERVATOIRE EUROPÉEN DE L'AUDIOVISUEL  
EUROPEAN AUDIOVISUAL OBSERVATORY  
EUROPÄISCHE AUDIOVISUELLE INFORMATIONSTELLE

## **Children and Audiovisual Services Status and Trends of Media Use and Availability of Services**

**Report prepared for the DG COMM of the European Commission by the  
European Audiovisual Observatory**

By

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April, 2013



This report is provided by the European Audiovisual Observatory to the European Commission in the framework of the contract « Service de base dans le cadre du contrat PN 2011-27/16» « Service à la demande couvrant la recherche et l'analyse de données relatives au marché de la télévision en Europe ».

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## Executive Summary

- This report looks at the way in which children, primarily the age group from 4 to 14 years use audiovisual services in Europe, with a specific focus on their favourite television programmes and on the most important online video services.
- The analysis is contextualised (in Part I) with data from national regulatory authorities and other research regarding equipment ownership and access. It shows that in terms of equipment levels, television continues to have the highest penetration in households with children in four major European countries, closely followed by Internet access.
- The same data also shows that games consoles are among the most likely media equipment owned by children in France, Germany and the UK. Other common devices are mobile phones and television sets. Individual Internet access among children is relatively low ( $\leq 15\%$ ) which means that Internet use is likely to be supervised by parents. National differences, particularly regarding ownership rates of television sets, suggest different national media cultures. Hence, there are high ownership rates among British children and very low rates among French children.
- Research of media user patterns has shown that television continues to enjoy high levels of affinity and is the most popular media activity among children. This changes with increasing age when children's preferences start shifting from television towards PC and online activities.
- Data on broadband homes throughout Europe reveals wide disparities between countries as regards access to high-speed Internet, which is necessary for accessing on-demand services. Hence, it is important to remember that access to new services is not universal and that traditional media outlets, and in particular television, still play an important role in informing and entertaining children.
- In the context of media access and trends in use, a brief overview is provided regarding debates and issues of media effects on children. This includes violent, harmful, sexual content, advertising, food advertising and the general commercialisation of children's media. It highlights media literacy as playing an important role in orientation, and in protection of children - and also as being an important precondition for democratic participation.

- An analysis of the development, availability and distribution of children's audiovisual services reveals a major expansion period between 2006 and 2010 when US owned pan-European channels such as Disney, Cartoon Network, Nickelodeon and Boomerang expanded their services throughout Europe.
- Results also show that the majority of national children's channels are established by private rather than public broadcasters and that the only truly Pan-European channels for children in the European Union are owned by US companies. Some national channels (Super RTL, KIKA) can be considered pan-European as regards their distribution (not specifically developed for an audience beyond the national but widely distributed). Another significant children's channel that has a pan-European reach is the Al Jazeera Children's Channel, available in nine European countries.
- The data from MAVISE show that the availability of children's channels on free DTT is rather limited with higher distribution rates on pay DTT – children's television is more likely to be a Pay service. Where public service children's channels exist, they usually are distributed on free DTT (KIKA, Gulli, CBBC, VRT Ketent, Rai Gulp, SVBT etc)
- Samples of on demand audiovisual services for children indicate that most national services are provided by traditional broadcasters including public service broadcasters and a variety of cable/IPTV operators. Pure on demand services are also provided by companies not connected to broadcasters and distribution companies. Many of the available services are pan-European and those of the traditional pan-European children's channels, the majority of which are registered in the UK
- Looking at the top five television programmes broadcast in 2012 in terms of reaching the greatest number of children, the research revealed striking differences between countries regarding the role of private and public broadcasters and illustrated the most important channels and broadcasters when it comes to reaching large numbers of children.
- The continent divides between a majority of countries where private channels are the strongest (18 countries) and where public channels (at least seven) are dominant for the child audiences. Another group of countries reveals a balance between the two (six countries).
- The report also clearly outlines exactly which channels and broadcasters are relevant in each country. In the case of one broadcaster, Central European Media Enterprises (CME), its channels almost completely dominate the market for the

children's audience in Bulgaria, the Czech Republic, Romania, Slovakia and Slovenia. The RTL Group fully dominates the children's market in Hungary, the Netherlands and the French Community of Belgium. The Modern Times Group (Sweden) entirely dominates regarding the top five in Estonia, Latvia and Lithuania.

- Regarding public service companies, there is also the strong example of the German public service channel KIKA which proves its popularity by being the broadcaster of four out of the top five children's programmes in Austria, and three of the top five children's programmes in Germany in 2012.
- Particular genres of programmes appeared in the top five for each country. News and information programming featured most prominently in Austria, Germany, Portugal, Romania and Spain. At least one news programme appears in the top five programmes for Bulgaria, Bosnia and Herzegovina, Cyprus, the "former Yugoslav Republic of Macedonia" and Denmark. Public news programmes are somewhat more successful in attracting child audiences.
- Important genres included those types of programming that traditionally target children such as films, animation, animated TV series, and animated films. All five top programmes in two countries fall into this category (Poland and the Czech Republic), four of five top programmes in six countries and three of the top five programmes in a further five countries are in this category.
- Almost 70% of movies, animated TV series and animated movies that appear in the top five are US productions. The countries that do not feature this genre at all include Bulgaria, Former Yugoslav Republic of Macedonia, Romania and Turkey, the Belgian Flemish Community, the United Kingdom, and the Netherlands, Portugal, France and Cyprus. These countries tend to have other genres such as telenovelas, talent shows or local drama that feature more prominently.
- Another significant genre was that of the "talent show" which proved popular throughout Europe. Such contests feature in the top five for 17 countries in this report - which is less than the data for youth audiences analysed in the previous report for the DG COMM (26 countries).
- The data also allowed a brief insight into the importance of domestic or foreign content. Among the top five programmes that most appeal to child audiences national productions account for 52% (including international formats), US productions for 26% and European productions for 10%. It is important to note that many of the "home produced" programmes that feature in the top five are based on international formats.

- In six countries, the most popular television programmes for children are home produced (France, the Netherlands, Romania, Serbia, Turkey and the United Kingdom). In another six countries 4/5 programmes that most appeal to child audiences are home productions (Belgian Flemish community, Cyprus, Denmark, Finland, Portugal and Sweden). In contrast, the importance of US programmes for children is most pronounced in the Belgian French Community, the Czech Republic, Estonia, Lithuania and Latvia.
- comScore results show that children spent between one third (Germany), 25% (United Kingdom) and 20% (Spain and France) of the average user time watching videos online. In comparison to online activities of 15 to 24 year olds, whose average user time watching videos online is well above the average population, children spend significantly less time with online videos. The reasons for this are most likely to be found in parental supervision, lower levels of autonomy regarding media use and different leisure interests that do not involve media.
- The most important category is “entertainment” featuring music, television, film or “multimedia”. The second most important category in all countries is that of “corporate presence”, which relates to advertising content. Categories such as “Family Youth and Kids” usually also appear in the top five.
- The category of “News and Information” ranks highest in the United Kingdom (6<sup>th</sup> place). Compared to the total viewing time, the audience market share for “news/information” videos is very low in the 4 countries that form part of the comScore data. This reflects generally lower levels of news consumption among children than among older age groups.
- The top online video websites for children feature entertainment videos and corporate presence videos. In the case of corporate presence/advertising videos it can be assumed that this is not content actively sought by child audiences but content which targets them or surrounds other content.
- Online video services of media websites (television, newspapers etc.) do not have a very strong presence in the overall top 20 for children. However, the public service channels in the UK dominate the top 5 for media outlet websites, while in other countries the private channels are stronger. In all cases the services of pan-European channels such as Disney, Nickelodeon and Cartoon Network are strongly represented in the top 20 for media outlets.
- Regarding media outlet news sources, the children in the UK are more likely to access online news services (5 of the top 20), than children in other countries. This

contrasts with the findings regarding viewing of television news programmes, where for the UK they did not feature at all in the top five. France follows in second place with three news media outlets in the top 20.



## Introduction

Children are growing up in a society where media forms an integrated part of daily life. The family household is generally the environment where children first make contact with and use media. Usually, it is television to which they are exposed to most often and for the longest time. Studies show that children as young as three also make first contact with the Internet at the nursery or at home. The home PC or laptop nowadays often provides the first literacy experience. While media use can be important for social integration, educational purposes and democratic participation, it also poses certain challenges and risks to children.

In the context of traditional communal media such as television, there was a stronger tendency for media use of children to be largely supervised by parents. However, technological developments of digital media have led to a trend of an increasingly individualistic media use that starts in childhood. The convergence of media and the multiplication of new platforms allow for audiovisual content to be accessed interchangeably and without direct parental control. These include PCs or laptops, tablets and mobile or smart phones. Access to such devices is possible for increasingly younger children.

Specifically, the report contains the following data sources. First, a synopsis of overall trends based on audience data provided by Eurodata TV Worldwide comprising results of the top five television programmes for child audiences in 2012. The data includes the five highest rated programmes throughout the year. Due to the protection of copyright of Eurodata TV Worldwide this report does not include specific audience data and instead makes reference to overall trends.

A total of 30 countries (two sets of data were provided for the two main Communities of Belgium) were included comprising the following: 25 of the 27 EU member states (except Malta and Luxembourg), the acceding country Croatia, the three candidate countries Serbia, the “former Yugoslav Republic of Macedonia” and Turkey (no data were available for Iceland or Montenegro); and potential candidate country Bosnia and Herzegovina (no data were available for Albania or Kosovo).

The second set of data provided by comScore covers the use of online videos by children in four major European markets that include France, Germany, Spain and the United Kingdom (no data available for Italy). Due to the protection of copyright of comScore this report does not include specific online audience data and instead makes reference to overall trends.

The third data source is the MAVISE database which identified 330 television channels in Europe that target children aged 6 to 14 years.

Part I of the report looks at levels of ownership of media equipment among households with children and children themselves. It also gives a brief overview of issues related to the risks and threats that media pose to children. In particular it provides:

- An overview of the use and availability of media equipment of young people and households with children based on national reports of four major EU countries (i.e. France, Germany, Italy and the U.K) focused on television, Internet and devices that enable the consumption of audiovisual content.
- A brief overview of some of the main issues regarding children and media effects

Part II and III of the report continue with a focus on the availability and distribution of audiovisual services for children by looking at national and pan-European children's television channels and examples of on demand audiovisual services for children. Since dedicated children's channels are not necessarily the most watched content among children the report analyses the actual viewing patterns by looking at overall trends based on the top five most popular programmes watched by child audiences. These parts include:

- The availability and distribution of children's audiovisual services with a special focus on national, foreign national and pan-European television channels
- The distribution of children's channels on DTT, and audience data for children's channels in 21 countries
- An overview of samples of on-demand audiovisual services for children
- An analysis of public versus private television channels
- The relevance of news and current affairs programmes for child audiences
- The attraction of animation, films and animated films for child audiences
- Looking at the talent show phenomenon
- An examination of domestic and foreign television productions that attract children

Part IV of the report provides an overview of online video services and children's behaviour regarding audiovisual content online. This section only covers data from France, Germany, Spain and the UK. Specifically it includes:

- An overview of online video viewing of children by category

- Top 20 online video websites in four countries
- Top 20 online services of major media outlets

In Part V, each country report contains the following information:

- An overview of children's channels established and available in the country and their distribution

## **Part I. Children, media use and access to equipment**

This section examines recent data on the access to and use of media equipment by children. It first focuses on equipment in households, and then the types of equipment owned by children. This is followed by a description of the types of activities of children with media, in particular online. A brief summary of some issues regarding children and media effects is addressed at the end of the section.

### **1.1 Media use and equipment of children within families**

For a majority of children digital media forms an integrated part of their daily lives – privately or at school. Ownership levels of media equipment among children, shared equipment as part of a family home and media use shed some light on the significance that media play in the lives of children. An important factor in this context is the rapid pace of technological development and the increasing convergence of media.

According to a definition by Kackman et al.<sup>1</sup> convergence is an umbrella term for the complex economic, social and technological processes that destabilise the concept of specific media, such as television, as distinct and separate objects. The term describes the transformation of television through the emergence of digital media. Examples include the availability of television content on various platforms or the ownership of television networks as part of international multi-media conglomerates.

The Internet offers a great choice of audiovisual content that can be accessed through a computer or mobile devices such as smart phones or tablets. To an increasing degree media and media devices are merging. So far the increasing multifunctionality of media devices has not resulted in a reduction of the range of such devices owned by private households. In a typical family home traditional media such as television and radio exist alongside more modern equipment such as PCs, Smartphones or tablets.

Based on national reports, the following section looks at media equipment owned by families and children in four major EU countries (Germany, France, Italy, United Kingdom) as these can be considered major trend setters. It should be noted that these reports have been carried out independently by national media research institutes and therefore are not

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<sup>1</sup> Kackman, M., Binfield, M., Payne, M. T., Perlman, A., Sebok, B. eds. 2011. *Flow TV: Television in the age of media convergence*. New York: Routledge

pan-European reports. Data presented in these reports are based on different age groups and categories. Hence, a direct cross-country comparison is not possible. However, the analysis groups similar data under sub-headings to allow a more structured presentation of results. The overview below outlines the different age groups examined in the national reports with special reference to particularly relevant age groups and categories.

Methodological details of national reports quoted in this section:

- Germany/ KIM study: age group 6-13 yrs
- UK/ Ofcom report: age group 5-15 yrs; relevant sub-groups 3-4 yrs 5-7, 8-11 yrs
- France/ Crédoc report: French population aged 11-14 yrs
- France/ CSA report: Tablette tactile : la nouvelle nounou ?
- Italy/ Istat report: Italian population aged 3+ yrs; relevant categories include households with at least one minor, 3-5/6-10 yrs

## 1.2 Equipment owned by households with children

The family home is the main place where children first make contact with media devices and learn how to use them. Parents not only provide access to media but their user patterns set an example and are likely to influence their children's future media use. For this reason it is useful to look at the equipment owned by households with children, particularly as children are less likely to be owners of such devices themselves.

### 1.2.1 German children and access to media equipment and Internet

The most recent research from Germany was gathered in 2012. The 2012 KIM study by the Medienpädagogischer Forschungsverbund Südwest<sup>2</sup> illustrated that a typical German household, in which 6 to 13 year olds live, has a television (100%), a mobile phone (98%) or a PC or laptop (95%). More than nine out of ten households have access to the Internet (96%). Further, a majority of households own a CD- (90%) or DVD player (88%), a digital camera (83%), a games console (75%) or MP3-player (69%). Less than half of households have a tape recorder (46%), a smartphone (44%), a DVD recorder (43%) or a video camera (39%). Less than one in five households is in possession of a children's PC (17%) or a

<sup>2</sup> Medienpädagogischer Forschungsverbund Südwest. 2013. *KIM-Studie 2012 Kinder + Medien, Computer + Internet. Basisuntersuchung zum Medienumgang 6- bis 13- Jähriger. Stuttgart*. [Accessed 27 May 2013]. Available from: [http://www.mpfs.de/fileadmin/KIM-pdf12/KIM\\_2012.pdf](http://www.mpfs.de/fileadmin/KIM-pdf12/KIM_2012.pdf); please note that this publication appears every two years

tablet (12%) and 11% of households with children aged 6 to 14 years have pay TV subscriptions.

With a few exceptions, results for media equipment in households with children aged 2-5 years show little variation to those with 6-13 year olds. While households with younger children are less likely to have a games console (42%) or MP3 players (59%), they tend to more often have DVD recorders (54%). Smartphones are owned by 48% and a tablets by 15% of households. The most common devices provided at nurseries include CD or tape recorders (91%), DVD players (30%), television sets (20%), digital cameras (17%), computers (11%) and Internet access (2%).

### **1.2.2 British children and access to media equipment and Internet**

According to 2012 Ofcom data<sup>3</sup>, the average UK household with children aged 5 to 7 years has digital television (97%), DVD player/recorder/Blu-ray recorder (91%), Internet (87%), games consoles or players (86%), radio (82%), DVR (77%), a portable media player (33%) or a tablet computer (22%). Access to smart TV is considerably lower (10%). Similarly, households with children aged 8 to 11 years have access to digital television (96%), Internet (93%), games consoles or players (93%), DVD player/recorder/Blu-ray recorder (92%), radio (85%), DVR (74%), a portable media player (39%), a tablet computer (19%) or smart TV (9%). Overall, households with a lower income have significantly lower access rates to the Internet, smart TV or DVR devices. Higher income households are more likely to have a DVD player/DVD recorder/Blu-ray recorder at home. Almost 40% of households of the highest social band have a tablet computer in the home compared to 8% in the lowest.

### **1.2.3 French children and access to media equipment and Internet**

Data from a 2012 Crédoc report<sup>4</sup> on the lifestyles of children aged 11 to 14 included the following description of households with children. While the great majority of children of that age live with both their parents (87%), some live in a household with one parent (9%) and 4% live in a patch-work family. On average children have two siblings with a proportion of 8% having neither sister nor brother. Virtually all households with children aged 11 to 14

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<sup>3</sup> Ofcom. 2012. *Children and Parents: Media Use and Attitudes Report* [online]. London: Ofcom – Independent Regulator and Competition Authority for the UK Communications Industries. [Accessed 23 October 2012]. Available from: <http://stakeholders.ofcom.org.uk/binaries/research/media-literacy/oct2012/main.pdf>

<sup>4</sup> Crédoc. 2012. *Étude sur les modes de vie des 11-14 ans et des Scouts et Guides de France en 2012* [online]. Paris : Department conditions de vie et aspirations. [Accessed 11 March 2013]. Available from: [http://www.credoc.fr/pdf/Sou/Scouts\\_Guides\\_de\\_France\\_2012.pdf](http://www.credoc.fr/pdf/Sou/Scouts_Guides_de_France_2012.pdf)

years have a personal computer (99%). The majority of children use the family computer (75%) while 28% have their own computer. These numbers have increased significantly since 2009 when 67% of the average French households had a personal computer.

#### **1.2.4 Italian children and access to media equipment and Internet**

According to data provided by the 2012 Istat report<sup>5</sup> a typical Italian home with people aged 3+ years owns a mobile phone (92%), a personal computer (59%) or a DVD player (59%). Less common are smart phones (35%), satellite dishes (34%), video cameras (25%) or games consoles (20%). 56% of households have access to the Internet with 49% having a broadband Internet connection and 5% non-broadband Internet access. Households with at least one minor are more technologically advanced and have the highest percentages in ownership of media equipment: all of these households have a mobile phone (100%), a personal computer (84%), a DVD player (82%), a smart phone (50%), a games console (47%), a video camera (45%) or a satellite dish (43%). 79% have access to the Internet with 71% having a broadband Internet connection and 6% non-broadband Internet access. Ownership levels of media equipment generally increase with household income. Furthermore, households in central or northern Italy tend to be better equipped with ICT goods and services than those in the south.

Overall, television continues to have the highest penetration in households with children in four major European countries, closely followed by Internet access. Games consoles are another common device owned by households with children.

### **1.3 Equipment owned by children**

In addition to the equipment owned by households where children live, their own equipment is perhaps more important as regards choices and media use. People tend to have greater autonomy over media devices they own themselves, particularly regarding individual user time and choice of content. Overall, individual equipment ownership of children tends to increase with age. Please note that such data was not available for Italy.

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<sup>5</sup> Istat; 2012. *Cittadini e nuove tecnologie* [online]. Roma : Istat - Istituto nazionale di statistica. [Accessed 11 March 2013]. Available from: [http://www.istat.it/it/files/2012/12/cittadini\\_e\\_nuovetecnologie.pdf?title=Cittadini+e+nuove+tecnologie+-+20%2Fdic%2F2012+-+Testo+integrale.pdf](http://www.istat.it/it/files/2012/12/cittadini_e_nuovetecnologie.pdf?title=Cittadini+e+nuove+tecnologie+-+20%2Fdic%2F2012+-+Testo+integrale.pdf) ; please note that percentages from the Istat report were rounded for this report

### **1.3.1 Germany: ownership of media equipment and Internet access**

According to the KIM Study 2012 children in Germany aged 6 to 13 years most commonly own a CD-player (58%). Every second child owns a games console (51%) or a mobile phone (49%). Other media equipment that children own includes MP3-players (45%) or a television set (36%). These are closely followed by radio (32%) or tape recorders (30%). Internet access and computers are less common – 21% of children in Germany own a PC or laptop and only 15% have access to the Internet in their rooms. Every tenth child has a children's PC, seven percent own a smartphone. Possession of a tablet is still the exception with only one percent ownership rate. Gender differences are notable regarding overall ownership rates – more boys tend to own their own media equipment than girls, particularly games consoles. Ownership rates generally increase with age, particularly those of mobile phones, television sets, games consoles, PCs and Internet access. A comparison with the 2010 KIM study shows a distinct downwards trend in ownership rates for certain equipment such as television sets (-9%), games consoles, tape recorders and radio (-6%). Significant increases in equipment ownership have been noted for PCs and access to the Internet (6%).

Individual ownership of media equipment among 2-5 year olds differs significantly from older children. Tape recorders are the most common device (28%), followed by CD players (25%), radio (9%), children's PCs (7%), games consoles (6%), MP3 players and television sets (3% each).

### **1.3.2 UK: ownership of media equipment and Internet access**

According to 2012 data from the Ofcom, children in the UK have a range of media equipment in their bedrooms. While children aged 5 to 7 years are most likely to have a television set (43%) older children aged 8 to 11 most commonly own a games console (60%). Games consoles are the second most popular equipment in the bedroom for 5 to 7 year olds (38%). 58% of children aged 8 to 11 years have their own televisions. DVD player/recorder/Blu-ray recorders are also very popular (24% for 5-7 years and 31% for 8-11 years). Access to digital television in their own rooms is at a lower rate than the overall access to television (14% for 5-7 years and 21% for 8-11 years) and access to the Internet in rooms is quite low (3% for 5-7 years and 14% for 8-11 years). In addition to the age groups above the report also offers data on media in the bedrooms of children aged 3 to 4 years: 33% have a television set, 17% a DVD player/recorder/Blu-ray recorder, 15% a games console or player, 8% have access to digital television, 4% to a DVR, 3% to a radio set, and 1% have access to the Internet through a PC, laptop or notebook.



Ownership rates of mobile phones among 5 to 7 year olds are still low at 5% with Smartphones accounting for 1%. These numbers increase significantly for the age group of 8 to 11 year olds where 43% own mobile phones of which 15% are Smartphone owners. Overall, children aged 5 to 11 are more likely to own another type of mobile phone rather than a smart phone. It is only from the age of 12 years that Smartphone ownership overtakes that of regular mobile phones.

### **1.3.3 France: ownership of media equipment and Internet access**

Data from the 2012 Crédoc report shows that the most common device owned by young people in France aged 11 to 14 are MP3-players (81%), games consoles (63%), mobile phones (40%), DVD players (13%), tablets (8%) and television sets in their bedrooms (6%).

Overall, games consoles are among the most likely media equipment owned by children across three major EU member states that include France, Germany and the UK This is followed by mobile phones and televisions sets as shown by data from Germany and the UK Individual Internet access among children is relatively low ( $\leq 15\%$ ) which implies that Internet use is likely to be supervised by parents. Some national specifics prevail with French children being most likely to own a MP3-player, British children having the highest ownership rates of television sets and the CD-player being the most commonly owned device by German children. On average around half of British children aged 5 to 7 and 8 to 11 years can call a television their own. This is closely followed by German children aged 6 to 11 years with 45%. French children aged 11 to 14 years are significantly less likely to own a television set with only 6% who do so. This could point to different national media cultures regarding individual ownership of media equipment among children.

TABLE 1.1: HOUSEHOLD AND INDIVIDUAL OWNERSHIP OF MEDIA EQUIPMENT

Data group / Country	PC/laptop	Mobile phone	Television	Internet access	Smartphones	Tablets	Pay TV	Digital Television	Smart TV	Games console
<b>Households with children</b>										
Germany HH with 6-13 yr olds	95%	98%	100%	96%	44%	12%	11%			75%
Germany HH with 2-5 yr olds					48%	15%				42%
UK HH with 5-15 yr olds				91%		20%		97%	10%	90%
UK HH with 8-11 yr olds				90%		19%		96%	9%	93%
UK HH with 5-7 yr olds				87%		22%		96%	10%	86%
France HH with 12-17 age group	98%	88%	96%	98%		8%				
France HH with 11-14 age group	99%									
Italy HH at least one U18	84%	100%	43% (satellite dish)	79%	50%	1%				51%
<b>Individual equipment ownership of children</b>										
Germany 6-13 yr olds	10%	49%	36%	15%						57%
Germany 2-5 yr olds	7%		3%							6%
UK individual ownership 5-15		49%	59%	20%	28%			25%		56%
UK individual ownership 8-11		43%	58%	14%	15%			21%		60%
UK individual ownership 5-7 yr		5%	43%	3%	1%			14%		38%
UK individual ownership 3-4			33%	1%				8%		15%
France 11-14	28%	40%	6%			8%				63%

Sources: Medienpädagogischer Forschungsverbund Südwest (KIM Study, 2013); OFCOM (2012); Crédoc (2012); Istat (2012)

## 1.4 Children and media use

Media play an increasingly important role in the lives of children as they are more and more exposed to media content via a variety of different devices to which they have access. It is important to note that the availability of data for this section varied significantly from country to country. While the UK and Germany offer the most detailed information, data on children's media use in France and Italy is less well documented. A cross-country comparison is therefore only possible to a limited degree.

### 1.4.1 Germany: media use, internet use, activities and supervision

#### *Leisure activities of children*

According to results of the 2012 KIM Study the most common leisure activities of children aged 6 to 13 include: doing homework and learning (97%), watching television (96%), meeting with friends (94%), playing outside (90%) or inside (88%), listening to music (82%), using computer, console or online games (62%), spending time with family (76%), doing sports (71%), using the PC, games consoles or online games (66%) or listening to the radio (59%) daily or at least one or several times a week. About half of children use the PC offline (54%), surf the Internet (52%) or use their mobile phones (48%) and on a regular basis. Data about the daily regular leisure activities shows the significance of television viewing for children (79%). Other most common daily activities include doing homework (73%) and playing inside or outside (51%). Further, one third of children use their mobile phones and one fifth is online on a daily basis. With increasing age children play less frequently inside or outside and more regularly with PC, games consoles or online games.

While the leisure activities of younger children aged 3-5 are largely dominated by playing inside (89%) or outside (67%), watching television (47%) is already more popular than spending time with books (45%).

When asked which leisure activity they like best children name meeting friends (52%), playing outside or watching television (38%), playing computer, console and online games (25%) as the top four preferences. Using the Internet receives 18%, offline computer use 9% and mobile phone use 8%. A comparison of the current data to the 2010 KIM study shows

an increase of 6% for watching television. Together with listening to music individually (53%) television use (44%) is among the top two most common media activities that children tend to do alone (this compares to 29% who watch television together with their parents or siblings (18%).

As they get older, children show greater autonomy in their media use. This is particularly true for using the Internet which is increasingly accessed without parental supervision (media activity that I mostly do alone: 6-7 years: 4%, 8-9 years: 15%, 10-11 years: 44%, 12-13 years: 69%). This points to a process of individualisation that is accompanied with a more personalised use of media equipment.

### ***Affinity to media devices***

When asked what would be the medium they could least do without, more than half of the children in Germany named television (57%). One quarter named computer and Internet as the most important medium and 8% could not do without books. Regarding gender differences, it is more boys who would not want to be without a computer or Internet access (30% vs. 19%) while more girls could not do without books (12% vs. 4%). With increasing age children's interests shift from television to computers and the Internet. Further, results show that the media preferences of parents tend to be directly reflected in their childrens' media use. If, for example, parents could least do without television their child tends to also show a high affinity to it. A comparison of KIM studies since 2006 shows that children's overall commitment to television has decreased continuously (2006: 70%, 2008: 68%, 2010: 58%, 2012: 57%) while levels of affinity for computers and the Internet have doubled over time.

According to their parents, children aged 2-3 years show the highest levels of affinity towards picture books (62%) and television (22%). This relationship is reversed in the age group of 4-5 year olds where 54% feel most attached to television compared to 26% to books.

### ***Television use***

Television enjoys high levels of popularity with up to 58% of children saying that they very much like watching television and another 40% saying that they like watching it. 82% of children have a specific programme that they particularly like to watch. This preference for a favourite show becomes less pronounced with increasing age when children's programmes are gradually replaced by more diversified adult content. Similarly, younger children tend to

switch on the TV for a specific programme; this becomes less pronounced with increasing age when children are more receptive to watch any programme on offer at the time they switch on the TV. 61% of children have a preference for a specific television channel with KIKA and Super RTL being the most popular (26%), followed by RTL (13%), ProSieben (8%), Nickelodeon and RTL (6%) and SAT.1 and VIVA (2%). Girls tend to favour KIKA (32% vs. 21%) and RTL (16% vs. 11%) while boys prefer ProSieben (12% vs. 4%) and Super RTL (28% vs. 25%). With increasing age KIKA and Super RTL become less popular as children's preferences shift to more adult content. News formats are watched by 27% of children and tend to do so more often with increasing age (20% of 6-7 year olds; 33% of 12-13 year olds). The older children get their preference for dedicated children's news programmes such as ZDF's logo shifts towards regular news formats for adult audiences.

### ***Mobile phone use***

Mobile phones play an increasingly important role for children with an average entry age of 10 years. While 9% of six to seven year olds claim to have a mobile phone, the figure is 34% among eight to nine year olds and 67% among 11 to 12 year olds. By the time children are 11 years old almost all of them (91%) claim to have a mobile phone. Smartphones are less common among the age group of 6-12 year olds (7%). The main activities when using a mobile phone involve making phone calls and sending text messages. Up to three quarters of mobile phone owners use their phones in this way at least once a week. Two fifth use their mobile phone devices for taking pictures or playing games. Every fourth child goes online with their mobile phones at least once a week and 20% are sending pictures or film clips. The use of Apps is less common (10%). The most common activities on a daily basis include text messaging (40%) and making or receiving phone calls (25%). Part of the daily routine for many children is to be called by their parents (26%), to call their parents (20%), playing games (12%) or going online (10%).

### ***Tablet use***

Tablets are becoming increasingly popular among children due to their user-friendliness thanks to touch screen technology and visual menus that do not require literacy skills to navigate. Despite this the user frequency of these still expensive devices among children remains low: while one third of children are allowed to use the tablet once a week, 29% are not allowed to use it at all. Older children, particularly from the age of 12, tend to be more trusted to handle a tablet. Children use tablets most commonly for watching pictures or videos (82%), playing games (76%), surfing the Internet (65%) or painting (50%).

### ***Internet use***

One has to bear in mind that levels of Internet use are limited by the age-related development stage with varying degrees of (media) literacy. On average, children start using the Internet at the age of 8 years and almost exclusively from home (98%). Among children aged 6-13 years 62% use the Internet. The increasing availability and user-friendliness of tablets and smartphones to children enhances the possibilities of younger children to access online content. Overall, Internet as well as computer use increases with a child's age. Half of the children (49%) use the Internet at least once a week and for 36% it has become a daily activity (an increase of 10% since 2010). While one third of 6-13 year olds use the Internet autonomously without prior consultation of their parents, the majority (70%) has to ask for permission before going online. While 29% of children are online for up to 30 minutes daily, 44% surf the Internet between 30 and 60 minutes per day. Overall, both affinity and the duration of Internet use increase with the age of a child. The most common Internet activities include the use of search engines (75%), accessing children's websites (53%), surfing the Internet (50%), watching movies/ videos online and using online communities (48%). Less common is sending emails (37%), using Wikipedia (34%), chat rooms (33%), Instant Messaging (27%) and watching TV online (11%). In comparison to the 2010 results, increases could be noted for the use of search engines, children's websites and surfing the Internet (7% each) as well as online communities (5%). When using search engines children are most likely to look for information that is relevant for doing homework (52%), online games (45%) and information about celebrities (43%). Over a third (35%) actively seeks news content which increases with the age of a child.

Overall, watching television continues to be the most popular media activity among children with 79% of 6 to 13 year olds watching it on several days per week or every day. On average children start watching television at the age of 3 years in Germany, which is the lowest entry age of media consumption compared to other media use (mobile phones: 10 years, Internet: 8 years). On average children aged 6 to 13 years watch 95 minutes of television every day. This number increases to 119 minutes for 12 to 13 year olds.

## **1.4.2 United Kingdom: media use, Internet use, activities and supervision**

### ***Most popular regular media activities***

The 2012 Ofcom report on the media use of children and parents details the following trends among 5 to 11 year olds. Watching television continues to be the most popular regular media activity of children of all age groups in the U.K with viewing peaking between 20:00 and 20:30. In the age group of 5 to 7 year olds 96% watch television almost every day which compares to 91% among 8 to 11 year olds. The second most common media activity is to play computer or video games, which 54% of children between 5 and 7 years and 62% of 8 to 11 year olds do. The use of the Internet is at the same level as playing video games (62%) for 8 to 11 year olds while 38% of 5 to 7 year old children use Internet. Watching videos or DVDs is a regular activity for 49% of 5 to 7 year olds and for 46% of 8 to 11 year olds. The use of mobile phones is a regular media activity for 31% of 8 to 11 year olds which compares to 6% of children aged 5 to 7 years.

### ***Overall media use at home***

When asked about their child's media use in the home, regardless of whether the devices were owned by the child or were commonly available in the household, 79% of parents with children aged 5 to 7 years and 91% of parents with children aged 8 to 11 said that they use games consoles or players. This is followed by 8 to 11 year olds who make use of the Internet through a PC, laptop or notebook (87%) and who use a DVD/ Blu-ray player or recorder (84%). In the age group of 5 to 7 year olds, 58% use the Internet and 78% use DVD or Blu-ray players. Mobile phones are used by 22% of 5 to 7 year olds which more than doubles among 8 to 11 year olds (52%). 66% of children aged 3 to 4 years use a DVD player or similar device at home, followed by a DVR (53%). 44% use a games console, 37% use the Internet, 32% use a radio set, 13% use a mobile phone, 12% use a portable media player and 9% a tablet computer. This suggests a very early introduction of children to media applications in the UK

### ***Devices used to watch television***

When asked which device their child has ever used to watch television programmes at home, parents of children aged 5 to 11 years said that their children watch TV content most likely on a TV set (98%). The older a child the more likely he/she is to watch television on an alternative device. The second most common device to watch television is on a PC, laptop

or notebook, which involves 14% of 5 to 8 year olds and 23% of 8 to 11 year olds. Games consoles are also used by 13% of 5 to 8 year olds and 15% of 8 to 11 year olds. Mobile phones and tablet computers are used much less for television content (below 5%). Among very small children aged 3 to 4 years, 97% watch television on a TV set, 12% on a PC, laptop or notebook, 7% on a games console, 6% on a tablet and 2% each on a mobile phone or portable media player.

### ***Time of day and quantity of television viewing***

When asked about an estimate of hours their children spent using different media, the parents of 5 to 11 year olds replied that most time is spent watching television (an average of 15 hours per week for both age groups). Internet and gaming come in second place with an average of 6 hours spent per week by 5 to 7 year olds, and 8 hours by 8 to 11 year olds. Children aged 3 to 4 spent 15.5 hours per week watching television and 6.2 hours on gaming. This implies that they watch more television and spend as much time gaming as the age group of 5 to 7 year olds. Children's viewing peaks between 8pm and 8:30pm with the majority of viewing taking place before 9pm. Among the 4 to 9 year olds, 14% watch television alone immediately after the 9pm watershed. Overall, two-thirds (67%) of viewing takes place in adult airtime signifying the main terrestrial channels such as BBC1, BBC2, ITV1, Channel 4 and Channel 5 (excluding children's programme slots).

When asked whether they felt that reality TV programmes (e.g. X-Factor), TV documentary programmes (e.g. wildlife programmes) or news programmes (e.g. Newsround) showed a true picture of what really happens, children aged 8 to 11 years assign the highest levels of authenticity to TV documentaries and news programmes (80% each).

### ***Devices used to access the Internet***

When asked whether their child ever uses devices other than a PC, laptop or notebook to go online at home, the parents of 5 to 7 year olds said that the most commonly used device is a PC, laptop or notebook (58%). This number decreased from 66% in 2010 indicating a potential shift towards other web-compatible devices. For the age group of 8 to 11 year olds, user levels of PC, laptop and net books are higher and at 87%. Games consoles were the second most common device to connect to the Internet. They are used by 18% of 8 to 11 year olds and 6% by children aged 5 to 7 years. The biggest increases in terms of user levels can be noted for mobile phones and tablet computers. While mobile phones were



used for online activities by 5% of children aged 5 to 7 (up from 1% in 2010), 12% of 8 to 11 year olds were using mobile phone devices to go online (up from 4% in 2010).

Similarly, tablet computers were used by 6% of 5 to 7 year olds and 9% of children aged 8 to 11 (both went up from 1% in 2010). Portable media players also noted increases in user levels to access the Internet. The order of devices used to go online is slightly different for children aged 3 to 4 years. While a PC, laptop or notebook is the most common device used to access the Internet (37%), tablet computers (6%) come before mobile phones (3%), games consoles (2%) and portable media players (2%). Overall, children aged 5 to 15 years who use the Internet at home are more likely to use a laptop or notebook rather than a desktop PC.

### ***Internet activities***

While children aged 5 to 7 years use the Internet weekly for games (47%), home work (38%) and avatar sites (33%), the older children aged 8 to 11 years prefer to use it predominantly for school and home work (67%), games (51%) and information (46%). Watching audiovisual content online is less popular among 5 to 7 year olds (15%) than among older children (37%). News content is relevant for 12% of children aged 8 to 11 years and 3% of 5 to 7 year olds. Among individual Internet activities, playing games (47%), school or homework (38%) and avatar websites (33%) are most popular among 5 to 7 year olds. Children aged 8 to 11 years prefer school or homework (67%), games (51%) and surfing the Internet (38%). Overall, younger children are more likely to use the Internet for games, while older children use it for homework, information or social networking.

Watching user generated content has also become increasingly relevant with 45% of children aged 8 to 11 years watching or downloading videos made by people (e.g. on YouTube). Furthermore, 28% watch or download TV programmes or films on websites of catch-up TV services like BBC IPlayer, 4OD, ITV Player or Sky Player or watch or download music videos (28% each).

Activities of 8 to 11 year olds considered as creative or civic include creating an avatar (48%), setting up a social networking website (23%) and uploading photos to a website (12%). Signing an online petition has only been done by a very small proportion (2%).

### ***Location, supervision and quantity of online use***

Children who use the Internet at home were asked where in the house they use it most often. For children aged 5 to 7 the living room is the typical location where they use the Internet (80%). It is a common space that is most likely to be supervised by a parent or older sibling. This is confirmed by numbers showing that the majority of 5 to 7 year olds spend most of the time using the Internet with an adult in the room (80%). 16% use another room to go online and in 4% of cases the child accesses the Internet from its bedroom. Children aged 8 to 11 years show a somewhat higher degree of autonomy. While 76% use the Internet when in the living room, 12% (bedroom) and 15% (other room) use alternate rooms that offer a presumably more private setting. For children aged 3 to 4 years the most common places to access the Internet are at home (37%), at the nursery (4%), elsewhere but not at home (1%), while 57% do not use it at all. Children aged 5 to 7 spend an estimated 6 hours online per week. This increases to 8,1 hours for children aged 8 to 11 years. Households with higher incomes show greater increases in the time spent online by their children than those of lower income. Overall, the estimated weekly volume of Internet use at home increases with the age of a child.

When asked about attitudes regarding the truthfulness of online content results show that children aged 8 to 11 years assign websites used for school or home work higher levels of trustworthiness (45% = all is true; 35% = some is true) than social networking sites. News and information websites also score high with 79% thinking that all or most of it is true.

When it comes to media literacy the majority of children aged 8 to 11 (67%) have experience in learning about the Internet at school. Lessons about television are more likely among older children aged 12 to 15.

### ***Affinity to media activities***

The age groups with the greatest affinity to television are children aged 5 to 11 years. 5 to 7 year olds are most likely to say they would miss television (53%) compared to 46% of 8 to 11 year olds. Older children aged 12 to 15 are more likely to miss their mobile phones. In second place comes playing video games (an average of 23% for both age groups). The third most important medium is watching videos and DVDs for 5 to 7 year olds (8%) and using the Internet for children aged 8 to 11 years (10%). In fourth place comes mobile phone use for the older age group and using the Internet for the younger group (both 6%). In terms

of gender differences it is boys who tend to say they would miss playing video games and girls who are more likely to miss watching television.

### ***Mobile phone activities***

The three main activities of children aged 8 to 11 when using their mobile phones include making phone calls (91%), sending or receiving messages (91%) and taking photos (61%). Playing games and listening to music are also popular activities when using mobile phones for around 50%. Other activities of children in that age group include sending or receiving photos (44%), taking videos (43%) and visiting websites (20%). Girls are more likely than boys to have ever used their phone for sending or receiving text messages (95% vs. 86%).

### **1.4.3 France: media use, Internet use and activities**

#### ***Leisure activities of children***

According to the 2012 Crédoc report<sup>6</sup> on children's lifestyles, the most common weekly activities of 11 to 14 year olds include time spent alone with reading and listening to music. Three quarters of children spend at least 3 hours and 41% over 5 hours per week with these activities. The second most common activity is homework (68%) with girls being more likely to spend more than 3 hours per week on this activity (72%). Sport comes in third place with 67% of children spending more than 3 hours playing sport per week. Spending time in front of the computer is the fourth most popular leisure activity (63%). Older children (13-14) are more likely to spend more than 3 hours at a computer (70%) than their younger peers (54%). 57% of children watch more than 3 hours of television every week and 30% do so for at least 1 to 2 hours. Other regular activities include going out with friends (46%) with girls being more likely to spend more time with friends (3 hours rather than the average 1 to 2 hours per week). 30% engage in cultural activities such as music, painting or theatre and leisure activities such as recreation centres or scouting for at least 3 hours per week.

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<sup>6</sup> Crédoc. 2012. *La diffusion des technologies de l'information et de la communication dans la société française* [online]. Paris : Department conditions de vie et aspirations. [Accessed 30 November 2012]. Available from: [http://www.credoc.fr/pdf/Sou/Credoc\\_DiffusiondesTIC\\_2012.pdf](http://www.credoc.fr/pdf/Sou/Credoc_DiffusiondesTIC_2012.pdf)

### ***Online activities***

According to results of the the 2012 Crédoc report, children and young people in France have different preferences when it comes to online activities. While the most popular activity among 12 to 24 year olds is social networking (82%), listening to music (66%) and watching films and video streams online (63%) children aged 11 to 14 show different priorities. Of the 95% of children who spend at least 1 hour per week using the Internet, 83% watch videos with children aged 12 to 14 being more likely to do so (86%) than their younger counterparts. The second most popular activity is using the Internet for homework and research (80%), followed by playing computer games (65%). More than half (53%) go online to communicate with others through chatting and one third (34%) use the Internet to access Facebook. The official 13 years age limit explains the data split between children aged 11 to 12 (81% not on Facebook) and 12 to 14 years (47% on Facebook). Around a quarter of children visit blogs (24%), one in five (21%) participates in forums and a small number (8%) write a blog. 38% of children use the computer for other activities such as writing emails, playing games (offline), organising photos or reading newspapers for learning purposes.

### ***Children and tablet use***

A survey by the Conseil supérieure de l'audiovisuel from September 2012 among parents with children under the age of 12 years<sup>7</sup> has shown that among participants 30% of households are equipped with a tablet that is connected to the Internet and that these are often used by their children. Results reveal that 71% of children use tablets at least occasionally and 30% use them frequently which is comparable to adult user patterns. Three out of four parents (76%) expressed support for their children in using new media saying that is is a good thing that young children learn how to use new digital tools. This positive attitude is reflected in the tendency of parents to actively encourage the early use of digital tools by purchasing tablet applications for their children, which 38% have done at least once and 27% having done so several times (for either tablets or Smartphones). The majority of these are game applications (84%) and to a lesser degree educational applications (46%) or an application telling a story (36%). Overall, parents think that in the long run early media use will be an asset to their children, giving them access to information and knowledge that no other generations had before. While 50% support this view a minority of 12% think it is to the

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<sup>7</sup> Conseil supérieur de l'audiovisuel. 2012. Tablette tactile: la nouvelle nounou [online]? [Accessed 13 March 2013]. Available from : <http://www.csa.eu/multimedia/data/sondages/data2012/opi20120912-tablette-tactile-la-nouvelle-nounou.pdf>

disadvantage of their children's development; 35% think that it is neither an advantage nor a disadvantage. The introduction of tablet computers at schools is supported by 53% while 42% of parents are against it.

#### **1.4.4 Italy: media use, Internet use and activities**

##### ***PC use and Internet activities***

According to data provided by the 2012 Istat report<sup>8</sup> 17% of children aged 3 to 5 years use a personal computer compared to 53% of 6 to 10 year olds. In the group of older children 41% are using the Internet. The main online activities of 6 to 10 year olds include watching video streams (27%), watching television programmes (19%), listening to the radio (15%), watching movie streams (13%), reading or downloading newspapers or news (9%) or uploading user generated content on a website to share (9%).

Overall, it can be noted that television continues to enjoy high levels of affinity and is the leading media activity among children. This changes with increasing age when children's preferences start shifting from television towards PC and online activities.

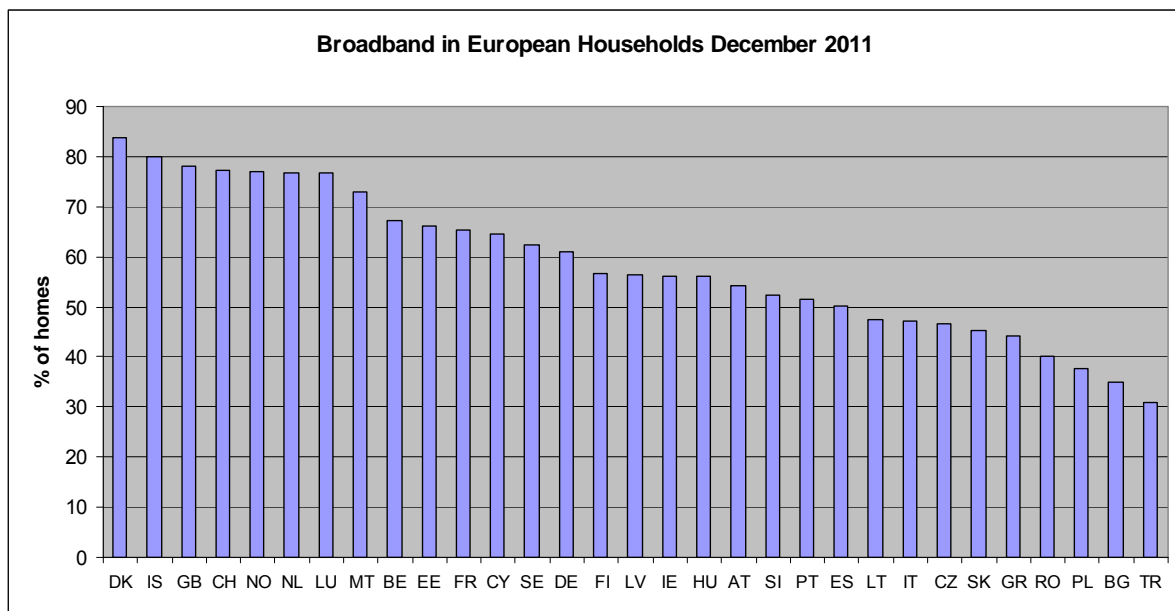
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<sup>8</sup> Istat; 2012. *Cittadini e nuove tecnologie* [online]. Roma : Istat - Istituto nazionale di statistica. [Accessed 11 March 2013]. Available from: [http://www.istat.it/it/files/2012/12/cittadini\\_e\\_nuovetecnologie.pdf?title=Cittadini+e+nuove+tecnologie+-+20%2Fdic%2F2012+-+Testo+integrale.pdf](http://www.istat.it/it/files/2012/12/cittadini_e_nuovetecnologie.pdf?title=Cittadini+e+nuove+tecnologie+-+20%2Fdic%2F2012+-+Testo+integrale.pdf) ; please note that percentages from the Istat report were rounded for this report

## 1.5 Levels of broadband Internet access

In addition, it is important to bear in mind that the quality of an Internet connection is an important factor for accessing audiovisual content online. This has direct ramifications for the levels of use of applications such as PCs, laptops, Smartphones and connected TV. The penetration of broadband Internet in Europe varies from country to country with levels ranging from over 80% in Denmark to just over 30% in Turkey. See Fig 1.1 below for detail.

**Fig 1.1 BROADBAND IN EUROPEAN HOUSEHOLDS DECEMBER 2011**



Source: Screen Digest/ Yearbook of the European Audiovisual Observatory 2012

## 1.6 Children and media effects – an overview of debates

Public discourses about media effects on children have been and still are largely dominated by the belief that media, and television in particular, have negative effects on children's behaviour. Examples include children's exposure to televised violence, pornographic or sexual content or aggressive advertising that may have negative effects on children's psychological and emotional dispositions and attitudes. Also of importance to the debates on

children and media is the level of advertising that targets children and the content of the advertising.

Concerns at the governmental level are illustrated by reports such as the independent review by Reg Bailey for the British Department for Education from June 2012<sup>9</sup> on the commercialisation and sexualisation of childhood. The report highlights a generally increased pressure for children to grow up more in today's society. It concludes a need for change in the way businesses operate in existing frameworks and calls for greater consultation of parent's opinions and concerns by broadcasters, businesses and regulators providing services and goods for children.

It is important to note that the children's television industry is as big as it is lucrative with a number of key stakeholders involved that reach from educational and entertainment content providers and programmers, to toy manufacturers, advertisers and advocacy groups to philanthropic organisations and governmental bodies.

### **Violence**

The media are frequently considered a factor in the development of anti-social behaviour. The effects of violent video games on aggression levels are a common and recurrent reference point as illustrated by a book entitled "Stop Our Kids to Kill: A call to action against TV, movie and video game violence"<sup>10</sup> published in the late 1990s arguing that video games not just glamorise violence but teach children and teenagers how to be violent. Other research stresses that exposure to violence encourages a de-sensitisation of people's reactions to violence. The catalyst model<sup>11</sup> places more emphasis on genetic and social influences, and experiences of stressful situations, and considers that these factors are much more influential than the impact of media exposure. The rise of digital media of course allows for further exposure to such content giving children easier and less controlled access to age-inappropriate or harmful content.

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<sup>9</sup> Bailey, R. 2012. *Letting children be children : Report of an independent review of the commercialisation and sexualisation of childhood* [online]. London : Department for Education. [Accessed 18 March 2013]. Available from: <https://www.education.gov.uk/publications/eOrderingDownload/Bailey%20Review.pdf>

<sup>10</sup> DeGaetano, G. & Grossman, D. Lt. Col. 1999. *Stop Teaching Our Kids to Kill : A call to action against TV, movie and video game violence*. New York: Crown Publishers.

<sup>11</sup> Ferguson, C. J. San Miguel, C., & Hartley, R. D. (2009). *A multivariate analysis of youth violence and aggression: The influence of family, peers, depression and media violence*. *Journal of Pediatrics*, 155(6), 904–908. Available at: <http://www.tamtu.edu/~cferguson/LYOJPed.pdf>

Regulation at the EU level in the form of the AVMS directive<sup>12</sup> deals with issues such as protection of minors - the implementation of a watershed, protection of minors from harmful content – and these regulations apply to both linear (traditional television following a schedule) services and on-demand audiovisual services. In the case of on-demand services, a watershed is not relevant. Hence the Directive requested that Member States examine filtering systems and age authentication systems for protecting children.

### ***Advertising, commercialisation and food***

The debate on advertising for children varies across different cultures. In many Nordic states advertising is completely banned around children’s programming. In others, attempts have been made to reduce or restrict such advertising. Rules at the European level in the Audiovisual Media Services Directive prescribe the protection of minors in relation to harmful content. The new directive also addressed the issue of advertising and sponsorship. Sponsorship is not allowed in the context of children’s programming. Following concerns regarding the development of obesity, the Directive also included a recommendation that Member States would “encourage”: *media service providers to develop codes of conduct regarding inappropriate audiovisual commercial communications, accompanying or included in children’s programmes, of foods and beverages containing nutrients and substances with a nutritional or physiological effect, in particular those such as fat, trans-fatty acids, salt/sodium and sugars, excessive intakes of which in the overall diet are not recommended.*<sup>13</sup>

Such codes are well developed in several countries, and also often include restrictions on the commercialisation of children’s television<sup>14</sup> for example as regards the use of celebrities to promote food, and the use of programme characters to promote products and merchandising related to the programming.

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<sup>12</sup> Directive 2010/13/EU of the European Parliament and of the Council of 10 March 2010 on the coordination of certain provisions laid down by law, regulation or administrative action in Member States concerning the provision of audiovisual media services (Audiovisual Media Services Directive) [online]. [Accessed 18 March 2013]. Available from: <http://eurlex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2010:095:0001:0024:EN:PDF>

<sup>13</sup> Directive 2010/13/EU of the European Parliament and of the Council of 10 March 2010 on the coordination of certain provisions laid down by law, regulation or administrative action in Member States concerning the provision of audiovisual media services (Audiovisual Media Services Directive) [online]. [Accessed 18 March 2013]. Available from: <http://eurlex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2010:095:0001:0024:EN:PDF>

<sup>14</sup> See for example the Broadcasting Authority of Ireland’s Children’s Commercial Communication Code: <http://www.bai.ie/wordpress/wp-content/uploads/Childrens-Commercial-Communications-Code.pdf>



Part IV of this report looks at online video viewing of children and the data highlights the prevalence of online advertising in the top 20 sites accessed by children.

### ***Media, education and development***

There are of course also positive effects of the media on children's behaviour and attitudes. Television, for example, has been a powerful ally in educating generations of children. On the international level the Children's Television Charter details the rights of children that are identified in the United Nations Convention on the Rights of the Child, in the context of television programming for children. The Charter, which dates from 1995, has since been adopted by many countries as a guide for producing quality television content for children. The development of dedicated educational children's programmes has been an important tool in that respect. Furthermore, digital media have become an integrated part of children's education benefiting both learning and research activities. Media literacy has been introduced to the curriculum of schools in many countries raising levels of children's media competences and skills. Media literacy has been recognised as an important measure for levels of social inclusion and the ability of children to understand and be able to use media is considered an important precondition for participatory democracy.<sup>15</sup>

There are a number of interesting studies that highlight the importance of media education to foster media literacy skills and help children to become competent users. One study deals with the development of a media education movement that has its origins in Europe with France playing a pioneering role and driving force.<sup>16</sup> What first started in the 1920s as a Paris-based cinema club soon expanded to press and later during the 1980s to other media. The article details the different stages of the media education movement from Europe to Canada, Australia and Russia. It further gives an overview of different media education models. Other studies deal with specific national media education policies, their implementation and best practices. Several of these studies are published by the Nordic research centre Nordicom which has a specific focus on children's issues.<sup>17</sup>

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<sup>15</sup> Ruddock, A. 2013. *Youth and Media*. Sage : Monash University, Australia

<sup>16</sup> Fedorov, A. 2007. Media education: A historical perspective [online]. [Accessed 18 March 2013], pp.1-24. Available from:  
[http://www.nordicom.gu.se/cl/publ/electronic/Media%20Ed%20Hist%20Perspt%20Fedorov\\_Mars07.pdf](http://www.nordicom.gu.se/cl/publ/electronic/Media%20Ed%20Hist%20Perspt%20Fedorov_Mars07.pdf)

<sup>17</sup> See for example : *Finnish Society on Media Education. 2009. Finnish media education policies: Approaches in culture and education* [online]. [Accessed 18 March 2013], pp.1-18. Available from:  
<http://www.nordicom.gu.se/cl/publ/electronic/mediaeducationpolicies.pdf>  
Cliona Barnes, Brian Flanagan, Farrel Corcoran And Brian O'neill. 2007. *Critical Media Literacy in Ireland* [online].. Dublin: The Radharc Trust. [Accessed 18 March 2013], pp.1-56. Available from:  
<http://www.nordicom.gu.se/cl/publ/electronic/Radharc.Report.NOV.2007.Critical.Media.Literacy.pdf>

### **Research on media effects**

Media effects have been and continue to be a contested field of research and public debate. The term refers to quantitative research such as experiments or surveys that examine how media, in conjunction with other social forces, influence people's attitudes and behaviour. Recent research<sup>18</sup> suggests that media effects are conditional in a sense that they depend on the dispositional, developmental and social circumstances of an individual. This implies that media effects are not uniform or affect one child in the same way as another. On the contrary, researchers argue that media effects depend on 1) dispositional factors such as gender, personality, values and beliefs, 2) developmental susceptibility meaning the responsiveness to media based on the level of cognitive, emotional and social development and 3) social-context factors such as parental restrictions to certain television programmes or games.

Another proposition is that media effects are indirect, meaning that there are mediating factors involved in the relationship between media use and effects. These mediating factors include a child's selective choices and cognitive efforts to comprehend media contents. Other factors include individual emotional reactions and degrees of physical arousal in response to media content. Evidence shows that cognitive and emotional development levels have a high potential to predict media use and preferences<sup>19</sup>. While toddlers are particularly attracted by media with a slow pace and familiar content, pre-school children prefer a faster tempo and adventurous contexts. School children favour more realistic content from which they can learn social lessons.

When children are exposed to television news it is largely to newscasts for adult audiences rather than dedicated children's news formats. Usually, this exposure – consciously or not - is taking place under some kind of adult supervision. While it can be beneficial to introduce and familiarise children with news from an early age for educational purposes, certain news content can cause frightened reactions with opposite effects. Research has shown that over one third (37%) of children aged 5 to 11 years who were exposed to a television news story

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<sup>18</sup> Valkenburg, P.M. & J. Peter. 2013. The Differential Susceptibility to Media Effects Model. *Journal of Communication* [online]. ISSN 0021-9916. [Accessed 18 March 2013], pp.1-23. Available from: <http://onlinelibrary.wiley.com/doi/10.1111/jcom.12024/abstract>

<sup>19</sup> Valkenburg, P.M. & J. Cantor. 2000. Children's likes and dislikes in entertainment programs. In D. Zillmann & P. Vorderer (Eds.). *Media entertainment : The psychology of its appeal*, pp.135-152. Mahwah, NJ : Erlbaum ; van der Goot, M., Beentjes, J.W.J. & van Selm. 2006. *Older adults' television viewing from a life-span perspective : Past research and future challenges*. *Communication Yearbook*.30, pp.431-469. Mahwah, N.J. : Erlbaum.

were frightened by what they saw<sup>20</sup>. The percentage of frightened reactions to televised news increased from kindergarten to the elementary school years when children learn to distinguish between fantasy and reality. The top categories causing these reactions included violence between strangers, foreign wars and famines and natural disasters. While the tendency of children to be frightened by violence between strangers increased with age, the tendency to be distressed by natural disasters decreased with age. These differences were largely due to developmental differences and children's ability to distinguish between fantasy and reality with increasing age as well as a child's individual responsiveness to salient stimuli. Younger children tend to be more frightened by visual threats than older ones. With increasing age children are less affected by visual threats and more afraid of invisible or abstract dangers. These results help explain certain concerns of parents who restrict access of young children to television news.

When asked what programme characteristics they value most in children's entertainment television programmes, a study of Dutch and US American children aged 6 to 11 years<sup>21</sup> found that children in Europe and across the Atlantic appreciate content that is comprehensible, action-oriented, innocuous, humorous and interesting. This means that children tend to be generally attracted by television content that is easy to understand with age-appropriate wording, that contains elements of action to foster excitement and programmes that do not show offensive content such as violence, nudity, bad words or scary situations. Furthermore, children value content that makes them laugh, shows surprising and interesting things or features role models. These preferences are presented as evidence that children are active in their use of television and that they have the ability to critically evaluate content.

Overall, it can be noted that it is the content that makes the difference in determining whether a medium has a positive or a negative effect on a child's development. In terms of media exposure one should not forget that most television content that children are exposed to is watched by someone else. Many parents are unaware of this exposure since a constantly switched-on television has become a fixed part of many home environments.

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<sup>20</sup> Cantor, J. and A. I. Nathanson. 1996. Children's fright reactions to television news. *Journal of Communication* [online]. 46(4). [Accessed 18 March 2013]. Available from: <http://onlinelibrary.wiley.com/doi/10.1111/j.1460-2466.1996.tb01510.x/abstract>

<sup>21</sup> Valkenburg, P.M. & S.C. Janssen. 1999. What do children value in entertainment programs ? A cross-cultural investigation. *Journal of Communication* [online]. 49(2). [Accessed 18 March 2013], pp.3-21. Available from: <http://onlinelibrary.wiley.com/doi/10.1111/j.1460-2466.1999.tb02790.x/abstract>

In a more modern sense, of course the Internet has now also become a constantly switched-on medium, available over more and more devices. As the data in section 1.2 shows, many children have their own televisions, private access to the Internet or use of Smartphones.

## **PART II. Availability and Distribution of Children’s Audiovisual Services**

### **2.1 Children’s television: National and International Channels**

Using data in the MAVISE database, a total of 330 television channels can be identified as targeting children between the ages of 6 and 14.<sup>22</sup> It should be noted that this age range - up to 14 – is very broad and that one could also consider that programmes and channels that target youth and teenagers may also be watched by children.

There are three categories of children’s channels available in the television households in Europe: national television channels – established within a country and targeting the national market; foreign national television channels – established in a particular country but frequently available in other countries often due to linguistic links; and Pan-European children’s television channels – channels established in one European country but with the specific aim of distributing the channels and content across a wide range of countries. We have included a full list of these available per country (Part V), and where possible the audience data for these channels. It should be noted that the audience shares for these channels are from the global audiences (i.e. all ages) and indicate their shares in comparison to all other types of channels.

#### **2.1.1 Growth and development of the children’s TV channel market**

The development of specific television channels that target children began in the United States in the 1980’s along with the general evolution of niche television channels that had growing access to cable or satellite capacity for distribution. In Europe, one of the earliest examples of a children’s TV channel is Canal J, launched in 1985 in France. The first Disney Channel began broadcasting in 1995. Two other French channels Mangas and Télétoon were launched in 1996. In the meantime Cartoon Network and Nickelodeon had arrived in Europe in 1993 and 1995 respectively. Perhaps the French broadcasters were the first to react to the phenomenon of US children’s television arriving in Europe. The German private channel Super RTL was also launched in 1995, followed by Junior in 1996.

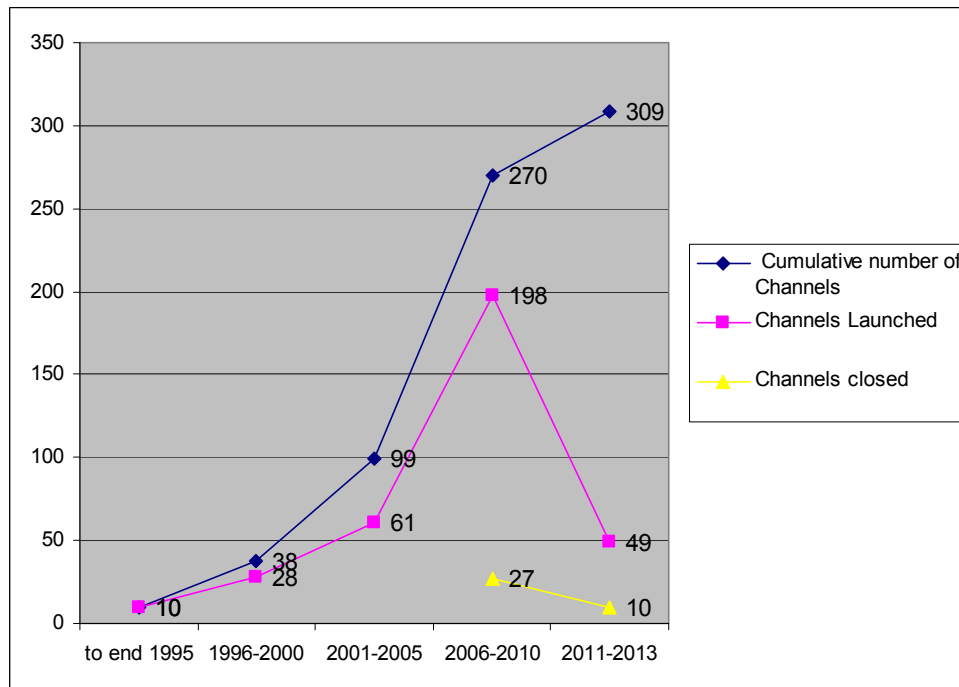
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<sup>22</sup> Here we have not included additional channels that target babies and very small children (under 6) such as Baby TV, Baby First, Duck TV, Cbeebies etc.

The Fig.2.1. below outlines the growth of the market for children’s channels from 1985 to 2013, and includes figures on the numbers of channels launched, channels closed and the cumulative number of channels available. It should be noted that as the data is based on the MAVISE database, which was launched in 2007, there is a possibility that channels launched and subsequently closed before the start of data collection for MAVISE have not been included in these figures.

The figure illustrates growth over five year periods (except for the 2011-2013 period). Some of the major expansions took place between 2006 and 2010 with the spread of Disney, Cartoon Network, Nickelodeon and Boomerang brands throughout Europe (see also 2.1.4).

**Fig.2.1. GROWTH OF AVAILABILITY OF CHILDREN’S CHANNELS IN EUROPE (1985- 2013)**



*Source: MAVISE/ European Audiovisual Observatory, March 2013*

### 2.1.2 National television channels for children

Most national television markets have children’s TV channels established in the country. Exceptions include many of the smaller television markets such as Estonia, Malta, Lithuania, and also Hungary. In small television markets there tend to be very few niche channels as the revenues and resources are not there to support this. Exceptions include Cyprus, where there is one national children’s channel (part of a pay TV package). The Slovak Republic is

the home of the pan-European television channel Duck TV (formerly Bebe TV) which targets babies and very young children.

<b>TABLE 2.1: NATIONAL CHILDREN'S TELEVISION CHANNELS</b>		
<b>Country</b>	<b>Public Children's Channels</b>	<b>Private Children's Channels</b>
<b>Only public national children's channels</b>		
Denmark	DR Ramasjang, DR Ultra	
Ireland	TRTE, RTEJnr, Cúla4	
<b>Public and private national children's channels</b>		
Belgium	VRT Ketnet, VRT Ketnet HD, La Trois, La Trois HD	Club RTL, Club RTL HD, Studio 100 TV, VTMkzoom, VTMkzoom +
France	Gulli (joint public/ private venture)	Berbère Jeunesse, Canal J, Mangas, Piwi, Télétoon, Tiji
Germany	KIKA, KIKA HD	Junior, Super RTL, Super RTL HD
Italy	RAI Gulp, RAI Yoyo	Boing TV, Cartoonito (Italy), DeaKids, Dea Super, DeA Junior, Frisbee, K2, Plant Kids
Netherlands	Z@pp 24	Kindernet, Pebble TV
Spain	Clan TVE	Boing (Spain), Canal Infancia
Sweden	SVTB	Cmore Kids
Turkey	TRT Çocuk	Kidz Animez, Maxi TV, Minika Go , Minika Çocuk, TV 2 (Turkey), Yumurcak TV, JOJO, Smart Çocuk, TRT Çocuk
United Kingdom	CBBC, Cbeebies	Cartoonito, CITV, Kix, Pop!, Popgirl, Tiny Pop!
<b>Only private national children's channels</b>		
Albania		Bang Bang, Çufo, Tring Tring , Junior TV
Austria		Super RTL Österreich (window)
Bulgaria		Super 7, DKTE (Ekids)
Croatia		OK Bambino, OK Orlando Kids, MINI TV
Cyprus		Lumiere TV1
Czech Republic		CS Mini, Minimax
Finland		MTV3 Juniori
Iceland		Stöð 2 Krakkar
Latvia		Lolo Baltic
Poland		Mini Mini, ZigZap, Polsat JimJam
Portugal		Canal Panda, Panda Biggs TV, SIC K,
Romania		Boom Smarty!, Megamax Romania
Serbia		FEELMAX JUNIOR, Kanal D (Serbia), Pink Kids, Mini Ultra, Happy K
Slovenia		Pop OTO
Slovakia		Duck TV, Duck TV HD

*Source: MAVISE/ European Audiovisual Observatory, May 2013*

Recently, in several small states new children's channels have been launched. In Denmark, a new public children's channel DR Ultra was launched on 4 March 2013, replacing the news channel DR Update. It is aimed at children aged 7-12.

In Ireland, two children's channels were launched in 2011 by the public service broadcaster. They were at first windows on the second public service broadcaster and then became cable channels (TRTE and RTEjnr). RTEjnr is now also available on the Free DTT network. The Irish language channel TG4 had a specific block of children's programming Cúla4, which in 2009 became a specific channel available over cable.

The private broadcaster Pop TV (Central European Media Enterprises) launched a range of thematic pay channels in Slovenia in 2011, including a children's channel Pop OTO. Similarly the Icelandic private broadcaster 365 Idlar launched a range of niche pay channels in 2012, one of which is a children's channel (Stöð 2 Krakkar).

Most children's television channels are established by private rather than public broadcasters. Table 2.1 illustrates national children's channels and the split between private and public channels. The first public children's channels included KIKA in Germany and VRT Ketnet in Belgium (both launched in 1997). The public service broadcasters play an important role in the provision of children's channels in Belgium, Denmark, Germany, Ireland, Italy, Spain, Sweden, Turkey and the United Kingdom (and Norway). In France the channel Gulli is a joint venture between France Télévisions and Lagardere.

In Germany a new channel, RIC TV<sup>23</sup>, was launched in 2012. It is described as targeting children from at 3 to 13 years old, who live outside the major metropolitan areas. The channel claims to broadcast programmes of mainly European origin, of high quality content and to be free from violence. The channel RTL Telekids in the Netherlands was originally a programming block and since 2012 has become a channel in its own right.

The larger European countries naturally have a wider range of television channels, such as in the UK, France, Italy, Turkey and Serbia.

### **2.1.3 Foreign National channels for children**

In many countries, a range of foreign children's channels are available. More obvious examples include the availability of the German children's channels in Austria and Luxembourg, French channels in Belgium and Luxembourg, and British children's channels in Ireland (easily exported due to the shared languages).

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<sup>23</sup> "Immer Richtig Cool", see website: <http://www.rictv.de/>



In addition certain national channels may have versions that target other countries (Minimax, 4Multimania) or specific windows (such as Super RTL Österreich).

Certain channels are very widely distributed in Europe, such as the German channels Super RTL and KIKA, or the Italian channel RAI Gulp. These are discussed in more detail under the section 2.1.4 on Pan-European channels (channels with a specific mission to target a range of countries).

TABLE 2.2: NATIONAL CHILDREN'S CHANNELS IN OTHER EUROPEAN COUNTRIES		
Country of establishment	Channel	Also available in
Albania	Tring Tring	Former Yugoslav Republic of Macedonia
Belgium	VRT Ketnet	Netherlands
Croatia	OK Orlando Kids	Montenegro, Former Yugoslav Republic of Macedonia
	OK Bambino	Montenegro
Czech Republic	CS Mini	Slovak Republic
	Megamax Hungary	Hungary, Slovak Republic
France	Canal J	Belgium, Luxembourg, Switzerland
	Gulli	Belgium, Luxembourg, Switzerland
	Gulli (Russian)	Latvia
	Mangas	Belgium, Luxembourg, Slovenia
	Tiji	Belgium, Bosnia and Herzegovina, Luxembourg, Portugal, Slovenia, Croatia, Switzerland
	Tiji (Russian)	Latvia, Lithuania
	Télétoon	Belgium, Poland
Germany	KIKA	Austria, Belgium, Bosnia and Herzegovina, Bulgaria, Croatia, Czech Republic, Estonia, Former Yugoslav Republic of Macedonia, France, Hungary, Lithuania, Luxembourg, Montenegro, Netherlands, Serbia, Slovak Republic, Slovenia
	KIKA HD	Austria, Netherlands, Montenegro, Serbia
	Junior	Austria, Luxembourg, Switzerland
	Super RTL	Austria, Belgium, Bulgaria, Croatia, Czech Republic, Denmark, Estonia, Finland, France, Hungary, Lithuania, Luxembourg, Montenegro, Netherlands, Portugal, Poland, Romania, Slovak Republic, Slovenia
	Super RTL HD	Austria, Belgium, Bulgaria, Czech Republic, Estonia, Finland, France, Croatia, Hungary, Lithuania, Netherlands, Poland, Romania, Slovak Republic, Slovenia
Italy	RAI Gulp	Bosnia and Herzegovina, Belgium, Former Yugoslav Republic of Macedonia, Luxembourg, Montenegro, Poland, Serbia, Slovenia
	Boing (Italy)	France, Malta
Latvia	Lolo (Baltic)	Estonia, Lithuania
Luxembourg	RTL Telekids	Netherlands
The Netherlands	Pebble TV	Belgium
Poland	Polsat JimJam	Lithuania
Portugal	Canal Panda (Spain)	Spain
Serbia	Pink Kids	Bosnia and Herzegovina, Croatia, Montenegro, Former Yugoslav Republic of Macedonia
	Kanal D (Serbia)	Former Yugoslav Republic of Macedonia, Montenegro
	Mini Ultra	Former Yugoslav Republic of Macedonia, Montenegro
Turkey	TRT Çocuk	France

United Kingdom	CBBC, CBeebies	Belgium, Ireland, Netherlands
	Cbeebies (Poland)	Poland
	Tiny Pop	Croatia, Hungary
	Cartoonito	Ireland , Malta, Netherlands
	Cartoonito (Spain)	Spain
	Cartoon Network Too	Iceland, Ireland , Malta
	Pop!, PopGirl, Kix	Ireland, Croatia
	CITV	Ireland
	Boing (France)	France

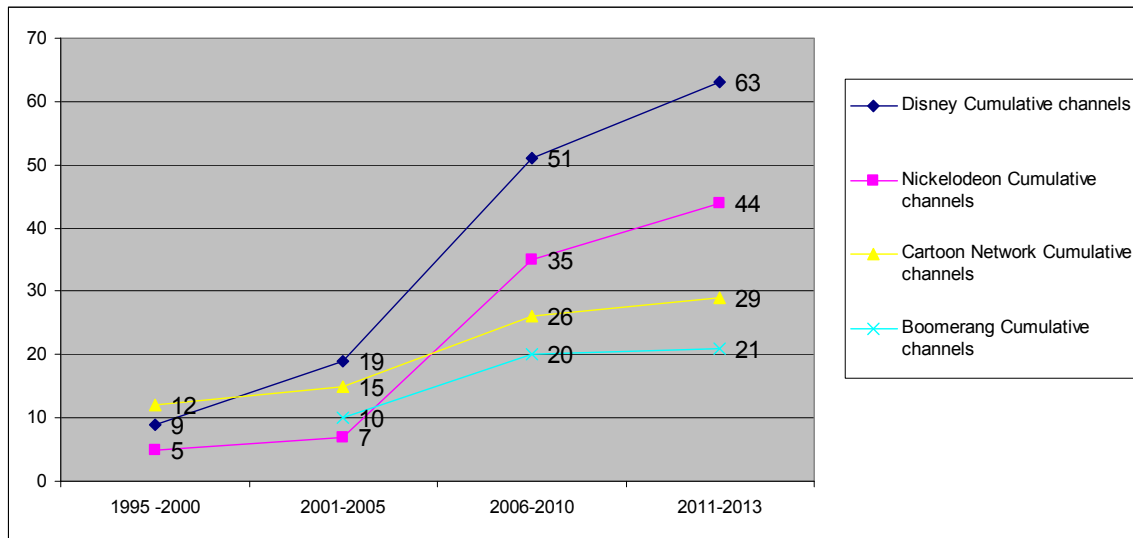
*Source: MAVISE/ European Audiovisual Observatory, May 2013*

#### **2.1.4 Pan-European television channels for children**

As noted earlier, some of the first pan-European channels that appeared in Europe were Cartoon Network in 1993, and the Disney Channel and Nickelodeon in 1995. Fig 2.2 looks at the growth and expansion of pan-European channels in Europe.

This report looked at distribution in 34 European countries (EU27 plus Croatia, Bosnia and Herzegovina, Iceland, Montenegro, the “former Yugoslav Republic of Macedonia”, Serbia and Turkey). The Disney Channel and Cartoon Network were available in all 34 countries in March 2013, while Nickelodeon reached 30 countries.

However, it is worth noting, if not also regrettable, that the only truly Pan-European channels for children in the European Union are owned by US private companies. These companies have subsidiaries in the EU from where they license their channels, in the United Kingdom (many of the linguistic versions), the Netherlands (including Nordic versions), the Czech Republic (many linguistic versions for central and Eastern Europe), France, Germany, Italy and Spain. These are all available in a wide variety of linguistic versions. Table 2.3 provides an overview of the companies, their channels, and the countries where they are available. (The full list of Pan-European channels by country in Part V).

**Fig.2.2. GROWTH OF MAIN PAN-EUROPEAN CHANNELS IN EUROPE (1995- 2013)**

**Source: MAVISE/ European Audiovisual Observatory, March 2013**

Similar research was carried out by the European Audiovisual Observatory in 2010 and since then there have been several additions to the list of Pan-European children's channels. For example, the Al Jazeera children's Channel launched in Europe in 2005 is now available in nine European countries: Belgium, Cyprus, France, Germany, Greece, Ireland, the Netherlands, Poland and the United Kingdom.

As noted in the previous section, there are also several national channels that can be considered pan-European as regards their distribution. A major example is Super RTL, which is available in 19 countries in this study, a figure similar to Kidsco or Jimjam. It is important to note that Super RTL (RTL Disney Fernsehen GmbH & Co. KG) is a joint venture between RTL and Buena Vista International (owned by Walt Disney Enterprises Inc). Hence it is also part of the Disney family of channels. The German public service channel KIKA also has a very extensive distribution in Europe, being available in 16 countries examined for this study.

TABLE 2.3: PAN-EUROPEAN CHILDREN'S TELEVISION CHANNELS

Company	Established in	Channels	Number of languages	Number of countries	One or more channels available in:
TIME WARNER	-United Kingdom -Germany	Boomerang	20	33	AT, BA, BE, BG, HR, CY, CZ, DK, EE, FI, MK, ME, FR, DE, GR, HU, IS, IE, IT, LT, LU, LV, MT, NL, PL, PT, RO, RS, SI, SK, ES, SE, GB
		Cartoon Network	21	34	AT, BA, BE, BG, HR, CY, CZ, DK, EE, FI, MK, ME, FR, DE, GR, HU, IS, IE, IT, LT, LU, LV, MT, NL, PL, PT, RO, RS, SI, SK, ES, SE, GB, TR
		Cartoon Network HD	1	2	GB, IE
THE WALT DISNEY COMPANY	-United Kingdom -Germany -France, -Spain, -Netherlands -Italy	Disney Channel, Disney Cinemagic, Disney Junior, Disney XD,	22	34	AT, BA, BE, BG, HR, CY, CZ, DK, EE, FI, MK, FR, DE, GR, HU, IS, IE, IT, LT, LU, LV, ME, MT, NL, PL, PT, RO, RS, SI, SK, ES, SE, GB, TR
		Disney Channel HD, Disney Cinemagic HD, Disney XD UK HD	7	10	AT, BE, DK, EE, FR, DE, IE, IT, ES, PT, GB
VIACOM INC	-United Kingdom -Netherlands, -Italy	Nickelodeon, Nick Jr, Nicktoons, NICK	19	30	AT, BE, BG, HR, CY, CZ, DK, EE, FI, MK, FR, DE, GR, HU, IE, IT, LT, LU, MT, NL, PL, PT, RO, RS, SI, SK, ES, SE, TR, GB
		Nickelodeon HD,	5	12	AT, BE, CZ, DK, DE, GR, IE, LT, PL, PT, RS, GB
LIBERTY GLOBAL	Czech Republic	Minimax	3	8	BA, HU, ME, SK, SI, MK, RO, RS,
	United Kingdom	Megamax	3	3	CZ, HU, RO
		JimJam		22	AT, BA, BE, BG, HR, CY, CZ, MK, GR, HU, IS, IT, LT, MT, NL, PL, PT, RO, RS, SI, SK, TR
NBC UNIVERSAL (COMCAST)	United Kingdom	Kidsco		21	AT, BE, HR, CY, MK, FR, DE, GR, HU, LT, LU, MT, NL, PL, PT, RO, RS, SI, SK, ES, TR
ALBERT BONNIER/ TELENOR	Sweden	C MORE Kids	4	5	DK, EE, FI, NO, SE
QATAR MEDIA CORPORATION	Qatar	Al Jazeera Children's' Channel	1	9	BE, CY, FR, DE, GR, IE, NL, PL, GB
RTVD	Germany	Detskij Mir	1	3	BG, FR, LT
RTR/ PERVY KANL	Russia	Karusel International	1	7	BG, CY, CZ, EE, FR, LV, LT
SIA VOXELL BALTIC	Latvia	4 multimania	3	3	EE, LT, LV
LAGARDERE	France	Tiji (Russian)	1	2	LT, LV

Source: MAVISE/ European Audiovisual Observatory, May 2013

### 2.1.5 Distribution of Children's channels on DTT networks

Before the development of digital terrestrial television, it was not possible to have niche channels and specifically children's channels available over the terrestrial system. In just nine European countries, the new capacities on Free-To-Air television have been used to add services for children (Belgium, Germany, Denmark, Spain, France, the United Kingdom, Ireland, Italy and Sweden). In all of these countries, the public service children's channels are on the Free DTT networks.

In addition, several national private children's channels are also available on free DTT in Germany, Spain and the UK.

TABLE 2.4: CHILDREN'S CHANNELS ON FREE DTT NETWORKS				
Country where channel is available on DTT	Channel	Statute	Language	Country of establishment
Belgium	VRT Ketnet	Public	Flemish	Belgium
	La Trois	Public	French	Belgium
Germany	Nickelodeon (Germany)	Private	German	Germany
	Super RTL	Private	German	Germany
	KIKA	Public	German	Germany
Denmark	Ramasjang	Public	Danish	Denmark
	DR Ultra	Public	Danish	Denmark
Spain	Disney Channel España	Private	Spanish	Spain
	Boing	Private	Spanish	Spain
	Clan TVE	Public	Spanish	Spain
France	Gulli	Mixed	French	France
United kingdom	CITV	Private	English	United Kingdom
	CBBC	Public	English	United Kingdom
	Cbeebies	Public	English	United Kingdom
Ireland	RTE Jnr	Public	English	Ireland
Italy	Boing TV	Private	Italian	Italy
	Cartoonito Italy	Private	Italian	Italy
	Frisbee	Private	Italian	Italy
	K2 (Italy)	Private	Italian	Italy
	RAI Gulp	Public	Italian	Italy
	RAI Yoyo	Public	Italian	Italy
Sweden	SVTB	Public	Swedish	Sweden

Source: MAVISE/ European Audiovisual Observatory, May 2013

The Pay DTT services have, not surprisingly, many more children's channels in a total of 14 countries (Belgium, Croatia, Cyprus, Denmark, Estonia, Finland, Hungary, Italy, Lithuania, Latvia, Malta, the Former Yugoslav republic of Macedonia, the Netherlands and Sweden). These include both national and Pan-European channels. Table 2.5 provides a comprehensive list of the children's channels in the pay packages for each country.

TABLE 2.5: CHILDREN'S CHANNELS ON PAY DTT NETWORKS				
Country where channel available on DTT	Channel	Statute	Language	Country of establishment
Belgium	Nickelodeon (Dutch)	Private	Dutch	Netherlands
Croatia	OK Bambino,	Private	Croatian	Croatia
	OK Orlando Kids,	Private	Croatian	Croatia
	Boomerang (Croatian),	Private	Croatian subtitles	United Kingdom
	Cartoon Network (Croatian)	Private	Croatian subtitles	United Kingdom
Cyprus	LTV1 (Lumiere TV1)	Private	Greek	Cyprus
Denmark	Cartoon Network (Danish)	Private	Danish	United Kingdom
	Disney Channel (Danish)	Private	Danish	United Kingdom
	Disney XD (Danish)	Private	Danish	United Kingdom
Estonia	Cartoon Network Europe	Private	English	United Kingdom
	Cartoon Network (Russian)	Private	Russian	United Kingdom
Finland	Disney Channel (Finnish)	Private	Finnish	United Kingdom
	Nickelodeon (Finnish)	Private	Finnish	United Kingdom
	MTV3 Juniori	Private	Finnish	Finland
Hungary	Disney Channel (Hungarian)	Private	Hungarian	Czech Republic
	Cartoon Network (Hungarian)	Private	Hungarian	United Kingdom
	Minimax (Hungary)	Private	Hungarian	Czech Republic
Italy	Cartoon Network (Italian)	Private	Italian	Italy
	Dea Super	Private	Italian	Italy
	Disney Channel Italia	Private	Italian	Italy
	Disney junior Italia	Private	Italian	Italy
Lithuania	Cartoon Network Europe	Private	English	United Kingdom
	Lolo TV Baltic	Private	Portuguese	Latvia
	Nickelodeon (Russian)	Private	Russian	United Kingdom
	Nickelodeon (English)	Private	English	United Kingdom
	Cartoon Network (Russian)	Private	Russian	United Kingdom
Latvia	Cartoon Network Europe	Private	English	United Kingdom
	Disney Channel Europe	Private	English	United Kingdom
	Disney Channel (Swedish)	Private	Swedish	United Kingdom
	Disney XD (UK + Ireland)	Private	English	United Kingdom
	Boomerang Europe	Private	English	United Kingdom
	Nickelodeon UK	Private	English	United Kingdom
	Nickelodeon (Russian)	Private	Russian	United Kingdom
	Disney Junior	Private	English	United Kingdom
	JimJam (English)	Private	English	United Kingdom
	JimJam (Russian)	Private	Russian	United Kingdom
Malta	Cartoonito	Private	English	United Kingdom
	Cartoon Network Europe	Private	English	United Kingdom
	Disney Channel	Private	English	United Kingdom
	JimJam (Italian)	Private	Italian	United Kingdom
	Nickelodeon UK	Private	English	United Kingdom
	Boomerang Europe	Private	English	United Kingdom
	Nick Junior UK	Private	English	United Kingdom
"Former Yugoslav Republic of Macedonia"	Boomerang Europe	Private	English	United Kingdom
	Cartoon Network Europe	Private	English	United Kingdom
	Kidsco	Private	English	United Kingdom
Netherlands	Nickelodeon (Dutch)	Private	Dutch	United Kingdom
	Kindernet	Private	Dutch	Netherlands
	Nat Geo Junior	Private	Dutch	Netherlands
	Disney XD (Dutch)	Private	Dutch	Netherlands
Sweden	Disney Channel (Swedish)	Private	Swedish	United Kingdom
	Disney XD (Swedish)	Private	Swedish	United Kingdom
	Nickelodeon (Swedish)	Private	Swedish	Netherlands

Source: MAVISE/ European Audiovisual Observatory, May 2013

### 2.1.6 Pan-European channels that target babies and small children

We have not included throughout the analysis the TV channels that specifically target babies, but the following table provides an overview of such channels.

TABLE 2.6: PAN EUROPEAN CHANNELS FOR BABIES AND SMALL CHILDREN		
Company	Channels (available in different linguistic versions)	One or more channels available in:
NEWS CORP/ Baby TV Network UK	Baby TV	Austria, Belgium, Cyprus, Estonia, Germany, Greece, Iceland, Italy, Lithuania, Latvia, Malta, Montenegro, United Kingdom
BFTV LTD UK	Baby First	Germany,
MEGA MAX MEDIA, S.R.O. Slovak Republic	Duck TV	Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Estonia, Germany, Hungary, Lithuania, Luxembourg, Malta, Montenegro, "Former Yugoslav Republic of Macedonia", Netherlands, Poland, Romania, Serbia, Slovak Republic, Turkey
	Duck TV HD	Cyprus, Czech Republic, Portugal, Slovak Republic

Source: MAVISE/ European Audiovisual Observatory, May 2013

### 2.1.7 Trends regarding audiences for children's channels (2011)

Overall trends based on audience data from 2011 highlight the importance of public children's channels such as KIKA (in Austria and Germany), Ketnet, La Trois (in Belgium), DR Ramasjang (in Denmark), Clan TVE (Spain), Gulli (France), CBBC (United Kingdom), RAI Yoyo (Italy), and SVBT in Sweden. In most cases, these are the most popular children's channels in their respective countries.

Regarding private channels, Club RTL (Belgium) and Super RTL (Germany) both have strong audience shares in their respective countries. Aside from other successful national channels, the pan-European channels frequently register strong audience shares. The Disney Channel scores highest in Bulgaria, the Czech Republic, Hungary, Poland, Romania and Slovenia, while it is in second place in Denmark, Spain, the United Kingdom, Portugal and Sweden. The Nickelodeon channels score highly in Austria, Belgium, Greece, Ireland and the Netherlands. A synopsis of trends for data on audiences for specific television programmes in 2012 is dealt with in detail in Part III.

### 2.1.8 An overview of On demand Audiovisual Services for children

The viewing of television programmes and movies as on-demand services is becoming more and more popular. Not surprisingly many such services have been developed for

children. In the context of an on-going survey on these services, being carried out by the European Audiovisual Observatory, it is possible to illustrate a sample of services that exist in Europe (see Tables 2.7 and 2.8). Please note that this does not represent a fully comprehensive list.

At the national level (Table 2.7), a variety of services are provided by cable operators such as Belgacom, Telenet and UPC (both part of Liberty Global), Numericable and Zon, and also operators like Canal+ in Poland. Most of the other services are from traditional broadcasters, including the public service broadcasters in Denmark, Germany, Ireland, Italy, the Netherlands, and the United Kingdom. Several services seem to be independent of both broadcasters and distribution companies with such examples being mainly French and German services.

At the pan-European level (Table 2.8), the most important pan-European channels such as Disney, Nickelodeon, JimJam, Boomerang, and Cartoon Network all have many on-demand services targeting different European countries. The majority of these are registered in the UK.



TABLE 2.7: SAMPLE OF NATIONAL ON-DEMAND AUDIOVISUAL SERVICES FOR CHILDREN			
Country	Company / Group	Services	Relevant channel or distributor
Austria	UPC/ LIBERTY GLOBAL	Kindersendungen bei UPC On Demand!	UPC cable Operator
Belgium	NV TELENET/ LIBERTY GLOBAL	Kids à la carte	Telenet Cable
	Belgacom	Kids Pass (Version in French), Kids Pass (Version in Dutch)	Belgacom Cable
Denmark	DR	DR Ramasjang (catch-up)	DR Ramasjang
		DR Ultra (catch-up)	DR Ultra (TV)
Cyprus	PRIMETEL PLC	Primatel Prime kids VOD	
Czech Republic	Ceskoslovenska; filmova spolnost, s.r.o.	Portajl CS mini	CS MINI (TV)
	CHELLO CENTRAL EUROPE, S.R.O.	Minimax @ Youtube	Minimax (TV)
		Web Portal animaxo	
Germany	SUPER RTL DISNEY FERNSEHEN GMBH & CO. KG	SUPER RTL NOW	Super RTL (TV)
		Super RTL @ Youtube	Super RTL (TV)
	ARD	KIKAplus	KIKA
	Kixi Entertainment GmbH i.Gr.	Kinderkino	
	STUDIO 100 VERWALTUNGS GMBH	Studio 100 @ iTunes Store DE	Studio 100
	DEUTSCHE TELEKOM AG	Videoload Kids Selection bei Deutsche Telekom	
Finland	MTV OY	MTV3 @ Youtube	MTV3 Juniori (TV)
France	MOONSCOOP	Bangoo	
		Bangoo @ iTunes Store FR	
		Bangoo @ Youtube	
		TaffyKids	
	CANAL J	Canal J @ Youtube	
		Canal J (catch up)	Canal J
	Mediatoon Licensing	etoon @ iTunes Store FR	
	GAME ONE	Game One @ iTunes Store	
	JEUNESSE TV	Gulli @ iTunes Store FR	
		Gulli @ Dailymotion	
		Gulli @ Youtube	
		Gulli replay	Gulli
	VIZ MEDIA EUROPE	Kzplay à Dailymotion	
	NUMERICABLE	Ludo	Numericable
	AB WEB	Manga VOD	Mangas
	BERBERE TELEVISION	Berbère Télévision @ Youtube	Berbère Jeunesse (TV)
		Berbere TV @ Dailymotion	Berbère Jeunesse (TV)
		Funanim	
	AB THEMATIQUES	Mangas à la demande	Mangas (TV)
SFR	Pass Kids (SFR)		
MULTI THEMATIQUES	Piwi+ (à la demande)	Piwi+	
	Télétoon+ à la demande	Télétoon (TV)	
CANAL J	Tiji à la demande	Tiji (TV)	
	Tintin TV @ iTunes Store FR		
	Wakanim		
	Zooloo Kids		
Ireland	RTE	RTE Junior online	RTEjnr (TV)
Italy	BOING S.P.A.	Boing @ Youtube Boing Guarda i Video	Bong
	RAI	RAI Gulp (Catch-up) RAI Junior @ Youtube RAI On Bambini RAI On Bambini (Cubovision)	RAI Gulp RAI Junior

Netherlands	NPO - NEDERLANDSE PUBLIEKE OMROEP	Z@pellin @ Youtube	Z@pellin
Poland	CANAL+ CYFROWY SP. Z O.O.	Miniminiplus Filmmiki	Minimini+
	CANAL+ CYFROWY SP. Z O.O.	Teletoon+ Wideo	Teletoon+
Portugal	ZON CONTEUDOS-ACTIVIDADE DE TELEVISAO E DE PRODUÇÃO DE CONTEUDOS,S.A	Zon Kids ilimitado	Zon Cable
	DREAMIA - SERVICOS DE TELEVISAO, S.A.	Canal Panda Portugal Video	Canal Panda (TV)
Spain	MEDIASET ESPAÑA COMUNICACIÓN, S.A	Boing @ Youtube (Spain)	Boing (Spain)
Sweden	TV4 AB	Lattjo Lajban catch up	TV4 (Sweden)
	SVERIGES TELEVISION AB	SVTB catch up	SVTB (TV)
Slovenia		AMIS Video Zabavnik	
UK	CHANNEL 5 BROADCASTING LIMITED	All Day Milkshake!	Channel 5

Source: MAVISE/ European Audiovisual Observatory, May 2013

TABLE 2.8: SAMPLES OF PAN-EUROPEAN ON-DEMAND AUDIOVISUAL SERVICES			
Country Established	Target Country	Services	Relevant channel or distributor
<b>THE WALT DISNEY COMPANY</b>			
United States	Austria	Disney (Version in German) @ XboX	Disney Channel Disney Cinemagic Disney junior Disney XD
Germany	Austria	Disney Channel Deutschland @ Youtube	
Germany	Austria	Disney XD Deutschland @ Youtube	
Germany	Austria	Disneynature (Version in German) @ XboX	
United Kingdom	Belgium- Flemish Community	Official Disney XD (NL) @ Youtube	
United Kingdom	Czech Republic	Disney Channel CZ @ Youtube	
United Kingdom	Denmark	Disney Channel (DK) (catch-up)	
United Kingdom	Denmark	Disney Junior (DK) (catch-up)	
United Kingdom	Denmark	Disney XD (DK) (catch-up)	
United Kingdom France	France	Disney Channel @ Dailymotion Disney Channel @ iTunes Store FR Disney Channel avant-première Disney Channel FR @ Youtube Disney Channel France Replay Disney (Version in French) @ XboX Disneynature (Version in French) @ XboX Disney Cinemagic à la demande (French) Disney Junior France à la demande Disney XD @ iTunes Store FR Disney XD France @ Youtube Disney XD France à la demande Disneystack	
Germany	Germany	Cinemagic DD @Youtube Disney Channel@ iTunes Store DE Disney Channel auf Abruf Disney Channel Junior @ iTunes Store DE Disney (Version in German) @ XboX Disney Channel Deutschland @ Youtube	

		Disney Junior (Germany) auf Abruf Disney XD Deutschland @ Youtube Disneynature (Version in German) @ XboX Disney XD @ iTunes Store DE Disney XD auf Abruf DISNEY.DE	
United Kingdom	Finland	Disney (Version in Finnish) @ XboX Disney Channel Finland (catch up) Disney Junior Finland (catch up) Disney XD Finland (catch up)	
United Kingdom	Greece	Disney Channel GR @ Youtube Disney Channel Greece (catch up)	
United Kingdom Italy	Italy	Cartoon Network Italia @ Youtube Disney Channel Italia @ Youtube Disney XD Italia @ Youtube Disney (Version in Italian) @ XboX	
United Kingdom	Netherlands	Disney Channel (NL) (Catch-up) Official Disney XD (NL) @ Youtube	
	Poland	Disney Channel PL @ Youtube Disney XD Polska @ Youtube Disney Channel (PL) (catch-up)	
	Portugal	Disney Movies on Demand PT	
	Romania	Disney Channel RO @ Youtube	
Spain	Spain	Disney Channel Espana @ Youtube Disney XD Espana @ Youtube Disney (Version in Spanish) @ XboX Disneynature (Version in Spanish) @ XboX	
United Kingdom	Sweden	Disney Channel catch up (Swedish) Disney Junior catch up (Swedish) Disney (Version in Swedish) @ XboX Disney XD catch up (Swedish) Disney XD Sweden @ Youtube	
	United Kingdom	Disney Channel @ iTunes Store GB Disney Channel Replay Disney Channel UK @ Youtube Disney Junior (catch-up) Disney Junior @ iTunes Store GB Disney XD @ iTunes Store GB Disney XD On-Demand Service Disney XD UK @ Youtube	
	Europe	Disney Channel Southeast Europe @ Youtube Jetix Europe @ Youtube	
<b>VIACOM INC</b>			
United Kingdom	Austria	Nickelodeon @ XboX	<b>Nickelodeon Nick junior Nick</b>
Germany	Austria	Nickelodeon Fanseite @ Youtube	
United Kingdom Netherlands	France	Nick Jr. @ iTunes Store FR Nickelodeon Junior France (à la demande) NickelodeonJunior (Version in French) @ Xbox Nickelodeon (France) (à la demande) Nickelodeon (Version in French) @ XboX Nickelodeon @ iTunes Store FR Nickelodeon Replay (Version in French)	
Germany	Germany	Nick.ch videos NICK.DE Nickelodeon @ iTunes Store DE Nickelodeon Fanseite @ Youtube NICKJR.DE	
Italy	Italy	NICKTV.IT Video Nickelodeon Italia @ XboX	

Netherlands	Denmark	Nickelodeon (catch-up) (Danish)	
	Finland	Nickelodeon Finland (catch-up)	
	Netherlands	Nickelodeon (catch-up) (Dutch) Nickelodeon Replay (Dutch)	
	Sweden	Nickelodeon (catch-up) (Version in Swedish)	
United Kingdom	Turkey	Nick Junior (Turkish)	
United Kingdom	United Kingdom	Nick Jr. @ iTunes Store GB NICK.CO.UK Nickelodeon @ iTunes Store GB Nickelodeon @ XbOX Nickelodeon & Nick Jr. OD NICKJR.CO.UK Official Nick Jr Promo @ Youtube	
<b>LIBERTY GLOBAL</b>			
Austria	Austria	Kindersendungen bei UPC On Demand!	<b>UPC cable Operator</b>
Belgium	Belgium	Kids à la carte	<b>Telenet Cable</b>
United Kingdom	Czech Republic	JimJam Hry (CZ)	<b>Jimjam</b>
	Hungary	JimJam Jatekok (HU)	
	Italy	JimJam Giochi (IT)	
	Netherlands	JimJam Spellen (NL)	
	Poland	JimJam Gry (PL)	
	Portugal	JimJam Jogos (PT)	
	Romania	JimJam Jocuri (RO)	
	Europe	JimJam Games	
<b>TIME WARNER</b>			
Germany	Germany	Boomerang auf Abruf Cartoon @ iTunes Store DE Cartoon Network auf Abruf Cartoon Network Deutschland @ Youtube	<b>Boomerang Cartoon Network</b>
United Kingdom	Denmark	Cartoon Network (DK) (catch up)	
Finland	Finland	Cartoon Network (version in Finnish) (catch-up)	
United Kingdom	Finland	Boomerang catch-up (Finnish version)	
United Kingdom	France	Boomerang à la demande Boomerang France @ Youtube Cartoon Network @ iTunes Store FR Cartoon Network France @ Youtube	
	Poland	Boomerang Poland @ Youtube	
	Spain	Cartoon Network Espana @ Youtube	
	Sweden	Boomerang catch up (version in Swedish) Cartoon Network catch up (version in Swedish)	
	United Kingdom	United Kingdom	Boomerang TV Videos Cartoon Network @ iTunes Store GB Cartoon Network UK @ Youtube

*Source: MAVISE/ European Audiovisual Observatory, May 2013*

Table 2.9 illustrates the fact that there are also on-demand services available for babies and very small children on iTunes and YouTube, and also for the services of the BBC.

TABLE 2.9: EXAMPLES OF ON-DEMAND SERVICES FOR BABIES			
Service	Company	Channel	Established
Baby TV @ iTunesStore GB		Baby TV (TV)	United Kingdom
Baby TV Video Player		Baby TV (TV)	United Kingdom
BBC Cbeebies @ Youtube		Cbeebies (TV)	United Kingdom
Cbeebies @ itunes Store GB		Cbeebies (TV)	United Kingdom

*Source: MAVISE/ European Audiovisual Observatory, May 2013*

## **Part III. Television viewing of Children in Europe**

Part II of this report deals with general trends regarding viewer patterns based on television audience data (Eurodata TV Worldwide) and looks at the five TV programmes that received the highest child audiences in 2012. Due to the protection of copy rights of Eurodata TV Worldwide this report includes references to general trends rather than specific audience data. It outlines the broadcasting companies and channels that play the most important role in the children's television market. The analysis also compares the role of public and private broadcasters in each country. Finally, there is a focus on the genres of programmes that appear in the top five for children throughout Europe. This includes the relative importance of traditional children's genres such as films, animated television series, and animated films, also the presence of news broadcasts, the phenomenon of talent shows, and a look at the consumption of children of domestic versus foreign (and particularly US) programming.

### **3.1 The top five television programmes in 2012**

For the purposes of this report, the data regarding the top five programmes for children in 2012 (measured from January to September 2012) were purchased from data provider Eurodata TV Worldwide. This data does not provide an average statistic for all programmes in 2012, but rather the list of the 5 highest rating programmes throughout the year.

Data was purchased for: 25 of the 27 EU member states (there is no data available for Malta or Luxembourg); for the acceding country Croatia; for the candidate countries Serbia, the "former Yugoslav Republic of Macedonia" and Turkey (no data were available for Iceland or Montenegro); and for potential candidate Bosnia and Herzegovina (no data were available for Albania and Kosovo). In total the data for 30 countries (with a total number of 31 sets of data including two for the main Communities of Belgium) are analysed here.

In the genres of programmes that were looked at it was decided to not include "sports" programming or weather bulletins. In particular there was concern that the number of very important events in the sporting world such as the European Football championships and the Olympic games may have distorted the data (i.e. the top five may all have been sporting events during the summer of 2012). For this reason they were not included.

### **3.1.1 Broadcasters and the top five TV programmes**

An analysis of the television programmes that achieved the highest audience share of children (age groups between 4 and 14 on average), also allows an analysis of the channels and companies who produce the most popular programming. Table 3.1 illustrates country by country which channels captured the highest audiences in 2012. There are several important pan-European media groups whose programming targets child audiences. As was the case in earlier studies regarding youth audiences, one company almost completely dominates the market for the children audience in Bulgaria, the Czech Republic, Romania, Slovakia and Slovenia and this company is the Central European Media Enterprises (CME), a Bermuda based company.

The RTL Group completely dominates the children's market in Hungary, the Netherlands and the French Community of Belgium. It also plays a very important role in Croatia where four out of five top programmes are from the RTL Group. The Modern Times Group (Sweden) entirely dominates the table regarding the top five in Estonia, Latvia and Lithuania. Another important broadcaster for children audiences that operates across borders is Mediaset (Spain and Italy). In a number of countries the children market is dominated by one channel only in the top 5. This is the case in Bosnia and Herzegovina (RTV BIH), Denmark (DR), Ireland (RTE) and Sweden (Sveriges Television AB) where all top 5 programmes for children are on public channels. In France the private channel TF1 dominates and in the "former Yugoslav Republic of Macedonia" private broadcaster SITEL TV provides all programming in the top 5.

Regarding children's channels, the German public service channel KIKA proves its popularity by being the broadcaster of four out of the top five children's programmes in Austria, and three of the top five children's programmes in Germany in 2012.

TABLE 3.1 CHANNELS AND BROADCASTERS OF TOP FIVE CHILDREN'S PROGRAMMES						
Country (age)	1	2	3	4	5	Company / companies
Austria (3-11)	ORF	KIKA	KIKA	KIKA	KIKA	- Österreichischer Rundfunk - ARD / ZDF
BiH (4-14)	Federalna	Federalna	Federalna	Federalna	Federalna	- RTV BIH
Belgium Flemish Community (4-14)	EEN	VTM	EEN	EEN	VTM	- VRT - VTM
Belgium French Community (4-14)	RTL-TVI	RTL-TVI	RTL-TVI	RTL-TVI	RTL-TVI	- RTL Group SA
Bulgaria (4-14)	bTV	bTV	bTV	bTV	bTV	-Central European Media Enterprises
Cyprus (4-14)	ANT 1	RIK 1	ANT 1	SIGMA	RIK 1	- CYBC - Antenna TV SA - Sigma Radio TV
Czech Republic (4-14)	NOVA TV	NOVA TV	NOVA TV	NOVA TV	NOVA TV	-Central European Media Enterprises
Germany (3-11)	ZDF	ARD	KIKA	KIKA	KIKA	- ZDF / ARD
Denmark (4-14)	DR1	DR1	DR1	DR1	DR1	- DR
Estonia (4-14)	TV3	TV3	TV3	TV3	TV3	- Modern Times Group (MTG)
Spain (4-12)	Telecinco	La1	La1	Antena 3	Telecinco	- RTVE - Antena 3 de television SA - Mediaset Espana
Finland (4-14)	MTV3	MTV3	SUBTV	YLE2	Nelonen	- YLE OY - Albert Bonnier AB - Sanoma - SUBTV OY
France (4-14)	TF1	TF1	TF1	TF1	TF1	- Groupe TF1
United Kingdom (4-5)	BBC1	ITV1	BBC1	ITV1	BBC1	- BBC - ITV PLC
Greece (4-14)	NET	MEGA	STAR	STAR	STAR	- New Television SA - Teletypos SA
Croatia (4-14)	RTL	RTL	NovaTV	RTL	RTL	- RTL HRVATSKA D.O.O. -Central European Media Enterprises
Hungary (4-14)	RTL Klub	RTL Klub	RTL Klub	RTL Klub	RTL Klub	- RTL Group SA
Ireland (4-14)	RTE 1	RTE 1	RTE 1	RTE 1	RTE 1	- RTE
Italy (4-14)	Rai 1	Italia 1	Canale 5	Canale 5	Rai 1	- RAI - Mediaset S.P.A.
Lithuania (4-14)	TV3	TV3	TV3	TV3	TV3	- Modern Times Group (MTG)
Latvia (4-14)	TV3	TV3	TV3	TV3	TV3	- Modern Times Group (MTG)
Former Yugoslav Republic of Macedonia" (4-14)	SITEL	SITEL	SITEL	SITEL	SITEL	- Sitel TV Broadcasting
Netherlands (3-12)	RTL4	RTL4	RTL4	RTL4	RTL4	- RTL Group SA
Poland (4-15)	TVP1	Polsat	Polsat	Polsat	Polsat	- Telewizja Polska SA - Polsat
Portugal (4-14)	SIC	RTP1	SIC	TVI	TVI	- Sociedade Independente De Comunicaçao, - Radiotelevisao Portuguesa - TVI-Televisao Independente,
Romania (4-14)	Pro TV	Pro TV	Pro TV	Pro TV	Prima TV	- Central European Media Enterprises - SBS Broadcasting Media SRL
Serbia (4-14)	RTS1	RTS1	RTS1	RTS1	RTS1	- Radio Televizija Srbije
Slovakia (4-14)	TV JOJ	MARKÍZA	MARKÍZA	MARKÍZA	TV JOJ	- Central European Media Enterprises - MAC TV s.r.o.
Slovenia (4-14)	Pop TV	Pop TV	SLO1	Pop TV	SLO1	-Central European Media Enterprises - Radiotelevizija Slovenija, Ljubljana
Sweden (3-14)	SVT1	SVT1	SVT1	SVTB	SVTB	- Sveriges Television AB
Turkey (5-11)	Kanal D	Kanal D	Show TV	Show TV	Kanal D	- Doğan Group
Turkey (12-14)	Kanal D	Show TV	Show TV	ATV	Show TV	- Turkuvaz Radyo Televizyon Gazetecilik ve Yayıncılık A.Ş. - Çukurova Group

Source: Eurodata TV Worldwide 2012/ Company data from MAVISE



### **3.1.2 Are children watching public service or private television?**

#### ***Strong public service channels***

There are very strong variations between European countries regarding the importance of private versus public television for attracting child audiences (see table 3.2 for details). These differences tend to reflect the overall audience market share of channels (i.e. public channels are always strong in certain countries, while private channels are stronger in others with regard to the entire audience). In several countries (7), public service broadcasting is particularly strong and scores 5/5 regarding the top ranking of programmes for children audiences. These include Austria (ORF/ARD/ZDF), Bosnia and Herzegovina (RTV BIH), Germany (ARD/ZDF), Denmark (DR), Ireland (RTE), Serbia (Radio Televizija Srbije) and Sweden (Sveriges Television AB) where all top 5 programmes for children are on public channels.

#### ***Balance between public and private***

For some countries and communities (6) there is a balance of power between the public and the private channels regarding the top five programmes for children. This is the case in the Belgium Flemish Community, Cyprus, Italy, Slovenia, Spain and the United Kingdom.

#### ***Strong private channels***

The final group includes those where the public channel only had one programme reaching the top 5: Finland, Poland and Portugal. This group also includes those countries and communities where the programmes of the public service channels do not appear at all in the top five (16). This group consists of the Belgium French Community, Bulgaria, Czech Republic, Croatia, Estonia, France, Greece, Hungary, Latvia, Lithuania, the "Former Yugoslav Republic of Macedonia", the Netherlands, Romania, Slovakia and Turkey. This highlights the predominance of private television in successfully attracting child audiences.

Overall some major contrasts can be seen between the children and the teenage/ youth audiences in Germany where in the former case, the public service dominates and in the latter case 4 out of 5 programmes were on commercial channels. In Slovenia, while the youth top five featured no public programmes, for children 2/3 top programmes were on the public service broadcaster. In contrast, while the Polish youth had a 4/5 choice on the public channel, the children's audiences had just one television programme from the public service broadcaster in the top five.

<b>TABLE 3.2 PUBLIC VERSUS PRIVATE AND CHILDREN AUDIENCES</b>				
<b>Country</b>	<b>Public</b>	<b>Private</b>	<b>Public Channel (company)</b>	<b>Private channel (company)</b>
<b>Countries where public service channels are most popular with children</b>				
<b>Austria (3-11)</b>	5	0	ORF 1 - (ÖRF) KIKA – (ARD/ZDF)	
<b>Bosnia - Herzegovina (4-14)</b>	5	0	Federalna TV - (RTV BIH)	
<b>Denmark (4-14)</b>	5	0	DR1 – (DR)	
<b>Germany (3-11)</b>	5	0	ZDF (ZDF) ARD / KIKA (ARD)	
<b>Ireland (4-14)</b>	5	0	RTE1 - (RTE)	
<b>Serbia (4-14)</b>	5	0	RTS1 - (RTV SRBIJE)	
<b>Sweden (3-14)</b>	5	0	SVT1/SVTB - (SVERIGES TELEVISION)	
<b>Countries where public and private channels are equally popular with children</b>				
<b>Belgium Flemish Community (4-14)</b>	3	2	Één - (VRT)	VTM - (DE PERSGROEP)
<b>Cyprus (4-14)</b>	2	3	RIK1 - (CYBC)	Sigma - (SIGMA RADIO T.V. PUBLIC LIMITED) ANT1 – (ANTENNA TV S.A.)
<b>Italy (4-14)</b>	2	3	Rai Uno - (RAI)	Canale 5/Italia 1 – (MEDIASET S.P.A.)
<b>Slovenia (4-14)</b>	2	3	SLO1 – (RADIOTELEVIZIJA SLOVENIJA)	Pop TV - (CME)
<b>Spain (4-12)</b>	2	3	La 1 - (RTVE)	Antena 3/ Tele 5
<b>United Kingdom (4-15)</b>	3	2	BBC1 - (BBC)	ITV1 - (ITV LTD)
<b>Countries where private channels are most popular with children</b>				
<b>Belgium French Community (4-14)</b>	0	5		RTL TVI
<b>Bulgaria (4-14)</b>	0	5		bTV - (CME)
<b>Czech Republic (4-14)</b>	0	5		TV Nova - (CME)
<b>Croatia (4-14)</b>	0	5		RTL/ Nova TV - (CME)
<b>Estonia (4-14)</b>	0	5		TV3- MTG
<b>Finland (4-14)</b>	1	4	YLE2 (YLE OY)	MTV3 - (ALBERT BONNIER) Nelonen/Sub TV - (Sanoma)
<b>France (4-14)</b>	0	5		TF1
<b>Greece (4-14)</b>	0	5		Mega - (TELETYPOS) STAR (New Television S.A.)
<b>Hungary (4-14)</b>	0	5		RTL Klub
<b>Latvia (4-14)</b>	0	5		TV3 (MTG)
<b>Lithuania (4-14)</b>	0	5		TV3 (MTG)
<b>The “former Yugoslav Republic of Macedonia” (4-14)</b>	0	5		Sitel – (SITEL TELEVISION BROADCASTING LTD)
<b>Netherlands (3-12)</b>	0	5	Nederland 1	RTL4
<b>Poland (4-15)</b>	1	4	TVP1 - (TELEWIZJA POLSKA )	Polsat - (TELEWIZJA POLSAT)
<b>Portugal (4-14)</b>	1	4	RTP1	SIC TVI
<b>Romania (4-14)</b>	0	5		Pro TV Prima TV – (SBS BROADCASTING MEDIA SRL)
<b>Slovakia (4-14)</b>	0	5		Markiza/ TV JOJ
<b>Turkey (5-11)</b>	0	5		Kanal D/ Show TV
<b>Turkey (12-14)</b>	0	5		Kanal D/ ATV/ Show TV

Source: European Audiovisual Observatory/ MAVISE based on data from Eurodata TV Worldwide 2012

### 3.1.3 Children and news

The data on top programmes also featured some examples of news programming. Not surprisingly this was somewhat less than in the case of youth (teenage and young adult) audiences examined in the previous report. There were 10 countries where news and/or information and/or political programmes featured in the top five programmes watched by children in 2012. The majority of those were newscasts for adult audiences where it is likely that the choice of programme is influenced by parents rather than children. Nonetheless, this means that children are exposed to political information within the family context.

Those countries where news/ information/ political programmes feature most prominently in the top five are: Austria, Germany, Portugal, Romania and Spain. At least one news programme appears in the top five programmes for Bulgaria, Bosnia and Herzegovina, Cyprus, the “former Yugoslav Republic of Macedonia” and Denmark.

It should be noted that these programmes represent the “top five” for each country. It could also be the case that news programmes feature in the top *ten* of the other countries.

Regarding who delivers the most popular news programmes, there is also a split between public and private channels. The public channels play a dominant role in four countries that include Austria (ORF), Bosnia and Herzegovina, Germany (ARD and ZDF) and Denmark (DR).

It is the private channels that produce the news programmes most watched by children in Bulgaria (bTV CME), Cyprus (SIGMA), Romania (Pro TV) and the “former Yugoslav Republic of Macedonia” (TV Sitel). Two countries have newscasts from both public and private broadcasters. In Portugal, and in Spain the news programmes of private channels SIC and Tele 5 (respectively) come in first place followed by the news reports of public channels RTP1 and La 1 (respectively) in second place.

If one considers the total number of news programmes in the ranking of the top five there are six public newscasts that come in first or second place versus three private ones. Three private news programmes are ranked 3<sup>rd</sup> and one 4<sup>th</sup> versus one public one in 5<sup>th</sup> place. This implies that public news programmes are somewhat more successful in attracting children’s audiences.

TABLE 3.3 WHERE NEWS IS A HIGH PRIORITY						
Country	Age groups	1st	2 <sup>nd</sup>	3 <sup>rd</sup>	4 <sup>th</sup>	5 <sup>th</sup>
<b>Germany (3-11)</b>	Children (3-11)	News (public)	News (public)	Fiction	Fiction	Fiction
<b>Portugal (4-14)</b>	Children (4-14)	News (private)	News (public)	Fiction	Fiction	Entertainment
<b>Spain (4-12)</b>	Children (4-12)	News (private)	News (public)	Fiction	Music	Fiction
<b>Austria (3-11)</b>	Children (3-11)	News (public)	Children	Children	Children	Entertainment
<b>Romania (4-14)</b>	Children (4-14)	Talent Show	News (private)	News (private)	Fiction	Fiction
<b>Bosnia and Herzegovina (4-14)</b>	Children (4-14)	Series	News (public)	Animation	Movies	Series
<b>Cyprus (4-14)</b>	Children (4-14)	Series	Light Entertainment	Series	News (private)	Light Entertainment
<b>Bulgaria (4-14)</b>	Children (4-14)	Reality	Series	Series	News (private)	Series
<b>“Former Yugoslav Republic Macedonia” (4-14)</b>	Children (4-14)	Series	Series	Reality Show	News (private)	Series
<b>Denmark (4-14)</b>	Children (4-14)	Talent Show	Music	Drama and fiction	Entertainment	News (public)

Source: Eurodata TV Worldwide 2012

### **3.1.4 Children, animation, films and animated films**

The types of genres that one would expect to be most popular with children (aged on average 4 to 14 years) should include films, animation, animated TV series, and animated films. Table 3.4 outlines where this is the case - where children are still watching the traditional genres for their age groups. All five top programmes in the Czech Republic and Poland fall into this category. Four of the top five programmes are in this category for the audiences in the Belgian French Speaking community, Estonia, Croatia, Lithuania, Latvia and the Slovak Republic. Three of the top five programmes are in this category for the audiences in Austria, Greece, Hungary, Ireland and Slovenia.

Several countries have just one example of this format: Denmark and Sweden (where talent shows are dominant), Spain, Finland, and Serbia.

A further nine countries do not feature such children's genres in the top five and these are: Bulgaria, Former Yugoslav Republic of Macedonia, Romania and Turkey (where TV series and Telenovelas are very popular) the Belgian Flemish Community, the United Kingdom, and the Netherlands (where talent shows are dominant); Portugal (which has a mix of news and Telenovelas); France (music, talent shows and reality shows); and Cyprus (local drama and TV series).

While this data distinguishes between the child audiences watching the more traditional children's genres and those watching the newer trends of talent shows (see section 3.1.5), or watching series dramas and telenovelas designed for an older audience, the animation and film genres also raise the question regarding the viewing of US content. From 49 programmes in the table below, 37 are US productions, or US European co-productions. Almost 70% of movies, animated TV series and animated movies that appear in the top five are US productions. This issue is analysed further in section 3.1.6 in relation to all programming.

TABLE 3.4: ANIMATION, MOVIES AND ANIMATED MOVIES IN THE TOP FIVE			
Country	Name	Genre	Produced
<b>Children's top programmes are all or mainly films and animations</b>			
Czech Republic	ALVIN AND THE CHIPMUNKS 2/	Animated Film	USA
	ALVIN AND THE CHIPMUNKS/	Animated Film	USA
	SHREK FOREVER AFTER/	Animated Film	USA
	THE DEVIL'S BRIDE/	Film	CZ
	KUNG FU PANDA	Animated Film	USA
Poland	THE LION KING/ KROL LEW	Animated Film	USA
	ARTHUR AND THE INVISIBLES	Animated Film	FR
	GARFIELD	Animated Film	USA
	BIG MOMMA'S HOUSE/ AGENT XXL 2	Film	USA
	VALIANT/ SZEREGOWIEC DOLOT	Animated Film	USA/ UK
Belgium CFB	LA PRINCESSE ET LA GRENOUILLE	Animated Film	USA
	L'AGE DE GLACE III	Animated Film	USA
	LE CHIHUAHUA DE BEVERLY HILLS	Movie	USA
	UNDERDOG	Animated TV Series	USA
Estonia	THE SIMPSONS MOVIE/	Animated Film	USA
	MEGAMIND/ MEGAMAINDAS	Animated Film	USA
	BLACK KNIGHT/	Film	USA
	ACE VENTURA: PET DETECTIVE/	Film	USA
Croatia	MADAGASKAR 2	Animated Film	USA
	KUNG FU PANDA	Animated Film	USA
	ARTHUR AND THE INVISIBLES/	Animated Film	FR
	MONSTERS VS ALIENS/	Animated Film	USA
Lithuania	THE SIMPSONS MOVIE/ SIMPSONŲ FILMAS	Animated Film	USA
	MEGAMIND/ MEGAMAINDAS	Animated Film	USA
	BLACK KNIGHT/ JUODASIS RITERIS	Film	USA
	ACE VENTURA: PET DETECTIVE	Film	USA
Latvia	MADAGASCAR	Animation Movie	USA
	GARFIELD 2	Animation Movie	USA
	STUART LITTLE 2/ MAZAIS STJUARTS 2	Movie	USA
	HOTEL FOR DOGS/ VIESŅICA SUNIEM	Movie	USA/ DE
Slovak Republic	WALL-E	Animated Film	USA
	HARRY POTTER AND THE ORDER OF THE PHOENIX	Film	UK
	HARRY POTTER AND THE GOBLET OF FIRE	Film	UK
	DR. SEUSS' HORTON HEARS A WHO	Animated Film	USA
Austria	YAKARI	Animation	BE/ FR
	LAURA'S STAR/ LAURAS STERN	Animation	DE
	BAUMHAUS	Film	n.a.
Greece	SPONGEBOB SQUAREPANTS/	Animated TV Series	USA
	LAZY TOWN	Animated TV Series	IS
	MERMAID MELODY/	Animated TV Series	GR
Hungary	CARS/ VERDAK	Animated Film	USA
	DENNIS THE MENACE/ DENNIS A KOMISZ	Film	USA
	ALADDIN	Animation	HU
Ireland	CHARLIE AND THE CHOCOLATE FACTORY	Film	USA/ UK
	MADAGASCAR	Animated Film	USA
	NANNY MCPHEE	Film	USA/ UK. FR
Slovenia	THE SMURFS/ SMRKCI	Animated TV Series	USA
	THE PENGUINS OF MADAGASCAR/	Animated TV Series	USA
	SABRINA'S SECRET LIFE/	Animated TV Series	USA
<b>Children's top programmes include films and animations</b>			
B & H	THE HARVEYTONS	Animated TV Series	USA
	TRACTOR, LOVE & ROCK'N ROLL/	Film	SI/ BA/ HR
Germany	YAKARI	Animation	BE/ FR
	WICKIE UND DIE STARKEN MÄNNER	Film	DE
Italy	LA BELLA E LA BESTIA	Animated Film	USA
	ALVIN SUPERSTAR 2	Animated Film	USA
Denmark	DISNEY FUN/ DISNEY SJOV	Animated TV Series	USA
Spain	THE LION KING/ EL REY LEON	Animated Film	USA
Finland	HORRID HENRY/ HIRVEÄ HENRI	Animated TV Series	UK
Serbia	MONTEVIDEO: TASTE OF A DREAM	Movies	RS
Sweden	VAMPYRSKOLAN	Animated Film	SE

Source: Eurodata TV Worldwide 2012

### 3.1.5 The talent show phenomenon

The report on young people and media use completed for the DG COMM in December 2012 revealed that “talent shows” featured in the top five watched programmes in 26 of the countries surveyed. For the child audiences the figure is 17 countries, a little bit less than for young people.

This programme format includes brands such as the *X-Factor*, ... *Got Talent* or *The Voice*. The Eurovision national and final competitions can also be considered as related to this category as (in general) unknown singers and musical talent compete at the European level. Table 3.5 outlines in detail the ranking of talent show formats in comparison to other programme genres.

Talent shows and/or the *Eurovision song contest* feature in the top five for 17 countries in this report. The countries where this type of format is important are the following: the United Kingdom, the Netherlands and Denmark (3 out of five); followed by Sweden, Belgium (Flemish Community) and Italy (2 out of 5).

TABLE 3.5 THE TALENT SHOW PHENOMENON						
Country	Age groups	1st	2nd	3rd	4 <sup>th</sup>	5th
United Kingdom	4-15	Talent Show	Talent Show	Drama	Talent Show	Music
The Netherlands	3-12	Talent Show	News	Talent Show	Entertainment	Talent Show
Denmark	4-14	Talent Show	Talent Show	Drama and fiction	Talent Show	News
Sweden	3-14	Talent Show	Talent Show	Game Show	Game Show	Fiction/movie
Belgium (Flemish Community)	4-14	Fiction	Talent Show	General Knowledge	General Knowledge	Talent Show
Italy	4-14	Fiction	Fiction	Talent Show	Talent Show	Fiction
Romania	4-14	Talent show	News	News	Fiction	Fiction
Bulgaria	4-14	Talent Show	Series	Series	News	Series
Hungary	4-14	Talent Show	Animation	Quiz	Comedy	Animation
Slovenia	4-14	Talent show	Animation series	Series	Children programme	Series
Cyprus	4-14	Series	Talent Show	Series	News	Entertainment
Turkey	12-14	Series	Talent show	Series	Series	Series
Ireland	4-14	Comedy	Fiction	Talent Show	Fiction	Fiction
Slovakia	4-14	Movie	Movie	Movie	Talent Show	Film animation
Spain	4-12	News	News	Fiction	Talent Show	Fiction
France	4-14	Entertainment	Entertainment	Entertainment	Talent Show	Entertainment
Turkey	5-11	Series	Series	Series	Talent show	Series
Finland	4-14	Entertainment	Entertainment	Entertainment	Children's programme	Talent Show

Source: Eurodata TV Worldwide 2012

These formats do not feature at all in the top 5 children programme lists of Austria, Belgium (French Community), Bosnia and Herzegovina, Czech Republic, Germany, Estonia, Greece, Croatia, Ireland, Latvia, Lithuania, the "Former Yugoslav Republic of Macedonia", Poland and Serbia. It is possible of course that these programmes may be visible in a *top ten* of programming for these countries.



### 3.1.6 Are children watching home produced or foreign content?

Table 3.6 outlines the top five programmes per country according to their country of origin. In six countries, the most popular television programmes for children are home produced (France, the Netherlands, Romania, Serbia, Turkey and the United Kingdom). For France, this is a more positive result than was the case with young people's viewing habits where three out of five of the most popular programmes were from the US. In another six countries 4/5 programmes that most appeal to child audiences are home productions (Belgian Flemish community, Cyprus, Denmark, Finland, Portugal and Sweden).

It is important to note that many of the "home produced" programmes that feature in the top five are based on international formats. But in addition, there are many examples of national drama and other programming enjoyed by children.

The importance of US programmes for children is most pronounced in the Belgian French Community (5/5), the Czech Republic, Estonia and Lithuania (4/5 each) and Latvia (3/5 plus one US/German co-production). In the case of the Belgian French Community the most popular programmes include four US children movies and a US series. Programming in the Czech Republic is also dominated by four US film productions. In Estonia and Lithuania the same four US movies feature most prominently. The most popular children's programming in Latvia is also dominated by four US film productions (one of them being a US/German co-production).

Looking at the origin of the total number of programmes featuring in the top five that most appeal to children audiences, home produced programming comes first with 80 productions (these include national adaptations of international formats).

TABLE 3.6 TELEVISION CONTENT: DOMESTIC OR FOREIGN					
Home produced programming most popular and dominates top 5 programmes for children					
Only home produced programmes in top 5		Home	Co- production	Europe	US
France	Children 4-14	5			
The Netherlands	Children 3-12	5			
Romania	Children 4-14	5			
Serbia	Children 4-14	5			
Turkey	Children 5-14	5			
United Kingdom	Children 4-15	5			
Mainly home produced programmes in top 5		Home	Co- production	Europe	US
Belgium (VLG)	Children 4-14	4		1	
Cyprus	Children 4-14	4		1	
Denmark	Children 4-14	4			1
Finland	Children 4-14	4		1	
Portugal	Children 4-14	4		1 (Brazil)	
Sweden	Children 3-14	4		1	
Germany	Children 3-13	3	1 Japan/Germany/ Austria 1 Belgium/France		
Greece	Children 4-14	3		1 (Iceland)	1
Hungary	Children 4-14	3			2
Italy	Children 4-14	3			2
Foreign programming most popular and dominates top 5 programmes for children					
Mainly foreign programmes in top 5		Home	Co- production	Europe	US
Bosnia-Herzegovina	Children 4-14	2	1 Bos/ Croatia 1 Bos/ Croatia/ Slovenia		1
Ireland	Children 4-14	2	1 US/UK 1 US/UK/France		1
Spain	Children 4-14	2		1	2
Austria (1)	Children 3-11	1		3	
Czech Republic	Children 4-14	1			4
Croatia	Children 4-14	1		1	3
Latvia	Children 4-14	1	1 US/Germany		3
Lithuania	Children 4-14	1			4
The "former Yugoslav Republic of Macedonia" (1)	Children 4-14	1		2 (Turkey)	
Slovakia	Children 4-14	1		2	2
Slovenia (1)	Children 4-14	1			2
(1) Others are unknown productions					
Only foreign programmes in top 5		Home	Co- production	Europe	US
Belgium (CFB)	Children 4-14				5
Estonia	Children 4-14			1	4
Poland	Children 4-15		1 UK/US	1	3

Source: European Audiovisual Observatory based on Eurodata TV Worldwide 2012

This is followed by 40 US productions, 16 "other European" productions, 8 co-productions (of which three are European, four are US/European and one is Japanese/European) and one Brazilian production. This implies that among the top five programmes that most appeal to child audiences, national productions account for 52% (including international formats), US productions 26% and European productions 10%.

## Part IV. Audiovisual online activities of children

In this section of the report, data from comScore is analysed regarding the use of online videos by children in Europe. comScore is a US company that provides statistics regarding user behaviour on the Internet. The data from comScore generally covers five major European markets: France, Germany, Italy, Spain and the United Kingdom. However, in the case of children, there is no data for Italy so this section just deals with four countries. The data will outline which Internet (general) websites providing video are most popular, and also which specific websites for media outlets are most popular with children.

### 4.1 Note on comScore methodology and approach

*comScore Video Metrix<sup>24</sup> provides transparent, end-to-end video measurement required to ensure scalability, growth and success in the online video marketplace. Powered by comScore's unique ability to separate video advertising and video content, Video Metrix Reach/Frequency is also available to simplify the planning of online video campaigns, and to assess the best fit to reach your target audience with video experiences.*

*Through its proprietary technology, comScore measures across the entire spectrum of web surfing and buying behaviour, including details of streaming media consumption. In order to accurately measure the complexities of streaming content, comScore partnered with industry leaders to develop methods for capturing key pieces of information on every streaming request viewed by our panellists, and is currently integrating census based information to capture the breadth of the Internet, there by combining the best of both methodologies. Importantly, comScore gathers data on requests sent via streaming servers as well as download methods.*

*The comScore Video Metrix measurement methodology analyses the media request itself via its panel and scales these insights to match the census level of overall video viewing. As panellists surf the Web, comScore dissects each request to identify important information about the URL location of the file and data contained within it. comScore gathers data on the file's duration, mime type, codec and format, and the software used to play the file. Importantly, comScore also matches each record to demographic data, enabling the analysis of not only the streaming content but also of those who consume it.*

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<sup>24</sup> [http://www.comScore.com/Products/Audience\\_Analytics/Video\\_Metrix](http://www.comScore.com/Products/Audience_Analytics/Video_Metrix)

## Scope

comScore Video Metrix measures the viewing of video on fixed Internet, both at home and at the office.

It does not measure:

- video audience on mobile or through connected TV sets
- audience for on-demand audiovisual service through distribution platforms (cable, IPTV, Satellite, DTT)
- audience of downloaded video content (such as a file downloaded from iTunes Store, Google Play Movie,...)

## Highlights

- **Objective.** Delivers industry-focused, third-party reporting of all competitors in the video-viewing marketplace.
- **Advanced.** Employs comScore's leading Unified Digital Measurement methodology for the most accurate and comprehensive view of the video marketplace.
- **Complete.** Provides the industry's only comprehensive measurement of the video marketplace, with the ability to track video advertising, top television programs, viral videos, and syndicated traffic.
- **Familiar.** Classifies video-viewing activity by TV dayparts for effective cross-media planning and GRP comparisons.

### 4.1.2 comScore and data on children

Annexe 1 contains a detailed description on the methodology behind the gathering of data. Here we cite the methodology regarding children in order to place the data in context.

#### NOTES ON THE VALIDITY OF COMSCORE DATA REGARDING CHILDREN'S AUDIENCES

The comScore panel that is the base for demographic information is recruited online and the following principles are applied for people under 18. comScore reports on 6+ online population in the UK, 6+ in France, 6+ in Germany, 4+ in Spain, 15+ in Italy. However, comScore does not allow children to install the meter – the person that installs the meter has to be at least 18 years of age and capable of entering into a binding agreement, be the parent or legal guardian of anyone under 18 having access to such computer, own or control the computer. The installing

person provides consent with the measurement on behalf of all users of the computer where the meter is installed.

People under 18 (users of machines with meter) are identified by the proprietary technology SAT (Session Assignment Technology). SAT verifies information provided by panelists at the stage of install (there is a short questionnaire including questions about number of children in the HH and how many children use the computer) and builds a demographic profile of each regular user of a panel machine. SAT collects information about machine users over time (e.g. demographics reported by the panelists themselves; demos and other info captured from visited sites as can be e.g. login info or cookies; data coming from databases of third parties) and on the bases of it SAT creates roster of users (=persons that are browsing from the machine). Children are identified via this process (as any other person) and once sufficient demo information is collected and verified these young users become standard part of the roster and the machine can go into the further processing of the collected data.

However, younger children require a specific approach. Children under 14 rarely self-identify online via login events and other key information, due to privacy concerns, co-viewing with other household members, or navigating by the parent even though the child is the consumer of the content. Because of this, relying on clues for identifying children presents a challenge to SAT. However, if activity is observed on a machine that is indicative of a child under 14, and there was previously not enough information via login or form submission events and other key identifiers to identify the child's actual demographics, we can be reasonably certain that there is a child using the machine and we create a temporary placeholder in the roster. For behavior to qualify as being "child-like", most of the websites visited during a session have to fall within an already specified (and periodically refreshed) list of children's websites. Demographics are then assigned to these "found" children via age and gender models, which compare their web activity to that of known children who were active in the last 4 months, and whose age and gender is known. Based on this comparison, the models output the gender and age bracket (6-11 or 12-14 years old) that most likely correspond to the web behaviors of individual "found" children. These demographic values for "found" children remain static until enough information is seen to change or update them.

To make the SAT picture complete, the other and equally important goal of SAT is to assign activity on a machine to one of the potential users. There are in principle two types of sessions - Marked and Unmarked sessions. The Marked sessions are the ones where observed some clues (e.g. email, username, password, etc.). If clues from traffic aren't captured during a session (=Unmarked sessions), the sites visited and the time of day together with the typing behavior observed are used to model user session assignment.

## 4.2 Children and their place in the online audience

In earlier studies, we have looked at young people (15 to 24 year olds) in the online video consumption environment. Not surprisingly they consume significantly more online videos than the overall population. As might be expected this is not the case for children.

The category of 15 to 24 year olds represents between 15.4% (Germany), 16.9% (Spain), 16.4% (France) and 17.9% (UK) of total unique viewers. For children the proportion is 6.6% (Germany), 8.3% (Spain), 7.4% (France) and 10.6% (UK). In all cases it can be noted that the average number of videos per viewer for the 15 to 24 year olds is much higher than the average population, while the average number of videos per viewer is much lower for children. The same applies to the data on “minutes per viewer”. The youth age group spends much more time viewing videos than the average population ( for example 30% more in Germany). In contrast children spend just one third (Germany), 25% (United kingdom) and 20% (Spain and France) of the average user time watching videos online. This should perhaps reflect the fact that children have less autonomy than teenagers and young people as regards media use, and that they are being protected on some level by parents/ elders or encouraged to participate in other activities.

## 4.3 Top categories of online videos for children

Table 4.1 deals with the categories of online videos accessed and viewed by children. comScore have a particular set of categories which include everything from entertainment to corporate videos, from adult content to news. These categories are based on the types of websites (see Annex 1). Not surprisingly the most important category of online videos are those labelled “entertainment” whether music, television, film or “multimedia”. The second most important category in all countries is that of “corporate presence”, which shall be further explored in section 4.4 and the data reveals that it often relates to advertising content. Categories such as “Family Youth and Kids” usually also appear in the top five. The category of “News and Information” ranks highest in the United Kingdom. Adult (XXX Adult) websites appear in all countries but higher up on the ranking of categories for France and Germany. A more in-depth analysis of this phenomenon can be seen in section 4.6.

<b>TABLE 4.1 TOP CATEGORIES OF CONTENT FOR CHILDREN</b>			
Germany	Spain	France	United Kingdom
Entertainment	Entertainment	Entertainment	Entertainment

Corporate Presence	Corporate Presence	Corporate Presence	Corporate Presence
Promotional Servers	Social Media	Promotional Servers	Promotional Servers
Family & Youth - Kids	Games	Services	Family & Youth - Kids
Lifestyles	Family & Youth - Kids	Family & Youth - Kids	Services
Services	Services	Social Media	News/Information
Social Media	Retail	Lifestyles	General News
Games	Promotional Servers	XXX Adult	Newspapers
XXX Adult	Lifestyles	Retail	Retail
Retail	News/Information	Portals	Games
Portals	General News	Games	Portals
Gambling	Newspapers	Gambling	Lifestyles
News/Information	XXX Adult	News/Information	Social Media
General News		General News	XXX Adult
Newspapers		Newspapers	Gambling
<b>Source : European Audiovisual Observatory on ComScore data</b>			

Compared to the total viewing time, the audience market share for “news/information” videos is very low in the 4 countries that form part of the comScore data. This is hardly very surprising as one does not expect children to be viewing as much news online as older age groups.

It is important to take into consideration the fact that videos with news could appear in other categories, in particular the sub-category “Entertainment – TV” and the sub-category “Multimedia – Entertainment”, which may include the TV branded channels on Youtube and Dailymotion. We therefore have established a ranking of the media outlets online video services (see section 4.5).

#### **4.4 Top online video services**

Using the comScore data, we searched for the top 400 online video websites for the children’s age group (6 to 14). In line with the data presented in the last section, entertainment videos and corporate presence videos are dominant in all countries.

##### ***Advertising***

Surprisingly, rather a large proportion of the top video websites relate to advertising services, that are not intentionally accessed but whose content is included in another web service. Findings for young people from earlier research showed a similar trend. Presumably the data recorded on the websites of advertisers does not represent content sought by children or young people but rather content that targets them or surrounds the other content. Such websites represent numbers 1 and 2 in Germany, and constitute a total of 6 places in the top 20. In Spain such a website is number 1, with a total of three out of 20.

In France, advertising websites are number 2 and 3 in the top 20, with a total of four such websites.

In the UK, the number is even higher: 10 of the top 20 sites visited by children are dedicated to advertising. One particularly important company appears to be *smartclip.com* which is number one in Germany and Spain, and number 2 in France. Another pan-European company is *FullScreen@ YouTube* (in the top ranks of Germany, Spain, France and the UK).

The fact is that people do not tend to spend very long on these sites. While they often have the highest number of unique visitors, they have a much lower score in terms of minutes spent watching videos.

### **Music**

Music sites score highly for the 6-14 age group. VEVO, followed by MTV and Warner music host the most popular music sites. VEVO is number one in France, and number three in Spain and the UK. However, it does not appear in the German top 20 where the only music site is MTV.

### **Entertainment – platforms for professional content distribution**

There are a range of sites categorised as “entertainment” by comScore, which on closer examination appear to be sites that provide an environment for artists to create, distribute, and monetize their original content on YouTube. Such sites include: *MediakraftNetworks @ YouTube* (number 5 in Germany). Across several countries the brands *Maker Studios Inc. @ YouTube* and *maker @ youtube* are significant in France, Spain, Germany and the UK.

### **Social media**

Social media sites are less important for children than was the case with young people. In Spain the social network *TUENTI.COM* ranks number six, while Facebook.com does not feature at all. For the other countries *FACEBOOK.COM* is number five in Germany, number eleven in France and Italy, and number ten in the UK (much less significant than in the case of young people).

### **Video Gaming**

In the data for young people, it emerged that two of the major video game websites across Europe are *Machinima@Youtube* and *WOW-EUROPE.COM* (World of Warcraft). They both appeared in the top 20 sites for the 15-24 age group in all countries. For children, *Machinima@Youtube* still scores very highly appearing in the top ten for the four countries.



Other video gaming sites are also prevalent. In Germany, *IDG Germany @ YouTube* is in 6<sup>th</sup> place. In Spain an important player is *ubisoft @ YouTube*. The site *WOW-EUROPE.COM* does not feature at all in the top sites for children.

### **Media outlet websites**

The actual online video services of media websites (television, newspapers etc.) do not have a very strong presence in the overall top 20 for children (the top 20 media sites for television and newspapers and other media outlets will be dealt with in the next section). However, these sites do have a presence in the top ranking. In Germany, *RTL.DE* ranks number 7, the *ProSiebenSat1* sites rank number 9 and Nickelodeon and Disney sites also appear at the end of the table.

In Spain, Disney sites (ranked 7 and 10), Mediaset España and Telecinco feature in the top 20. The most popular French channel, the private channel TF1 ranks number 9 in France for unique visitors viewing online content. In the UK, the services of media outlets appear to be most successful with the BBC Children website ranking number five for British children. The *BBC IPlayer* (catch-up TV services of the BBC) comes in at number eleven.

### **Other**

Other types of websites that children visit include the home pages of toy manufacturers such as Mattel. There are also a range of popular websites where children can draw, paint and design online. In addition to the gaming websites mentioned above, there are also sites that feature children's games – not games for young people and adults. These do not appear in the top 20, but do appear under the video category for “Kids” implying that they contain some video content.

## **4.5 Top 20 media outlets online video services**

The websites and online video services of traditional media outlets such as TV and press are not so important for the children surveyed by the comScore measurement. They are, in general, ranked lower than music, social networking and gaming online services.

### **Public service broadcasters**

In the UK, the services of the BBC are dominant on the table of top 20, with *BBC children* at number 1, *BBC IPlayer* at number 2, *BBC@YouTube* placed at number five and BBC News in rank 7.

In France, the public service channel *France2* ranks in second place for children (as compared to fourth place for teenagers and youth). The public/private channel for kids, *GULLI* ranks 5th place.

The German public service broadcasters feature in the top 20, specifically *KIKA* the children's channel is in 6<sup>th</sup> place. An online children's service of the ZDF *TIVI.DE* reaches third place. Some specific programmes for children are also highly ranked such as: *Die Maus* (number 10) and *KIKANINCHEN.DE* (number 16).

The Spanish public service broadcaster's online service *RTVE.ES* ranks 4<sup>th</sup>, with the Youtube version of the channel in 14<sup>th</sup> place. The web services of the BBC also appear on the list of top 20 for Spanish children, ranking number 16.

### ***Private broadcasters***

In Germany the private broadcasters dominate the top rankings for online video services. *RTL.DE* ranks top. *71i.de* (which is the online service of the channels of broadcaster ProsiebenSat1) ranks number two on the German table. In addition *PROSIEBEN.DE* takes eight place and *RTL NOW* is in 10<sup>th</sup> place. Pan-European children's services that register in the top 20 are *NICK.DE*, *DISNEY.DE*, *NICK.COM*, *Cartoon Network.DE* and *Disney Online @ YouTube*.

The French private broadcaster *TF1.FR* ranks number one (similar to its very important position as regards television viewing for French youth). It is followed by *CANALPLUS.FR* (second place), *Disney.FR* (third place) and *M6REPLAY.FR* (5<sup>th</sup> place). Other pan-European children's channels that register in the top 20 are *Disney Online @ YouTube*, *Nickelodeon Kids & Teens*, *Cartoon Network Online* and *NICK.COM*.

Disney and Fox sites rank numbers one and two in Spain. They are followed by several national channels including Telecinco and Antena3. The sites of Nickelodeon and Cartoon Network are also present in the top ranking, but the national Spanish children's channels do not feature in the top 20.

Finally, despite the overwhelming scores of the BBC services in the UK, the commercial broadcasters score highly with *SKY.COM* in third place and *ITV.COM* in sixth place. As expected Disney (number 4), Nickelodeon and Cartoon Network all feature in the top 20.

### ***Newspapers and news services***

Newspapers and news services do not play a significant role for children on the Internet. A major exception to this is the ranking of news websites for children in the UK, with five news websites in the top 20: *BBC News* (7), *Yahoo!-ABC News Network* (9), *CBS.COM*

(12), *Current TV / TYT Network* (14), *The Young Turks @ YouTube* (15), and the *The Daily Mail* (20).

In the case of France, there are several examples of such services: *TF1 News*, *Nouvelobs.com* and *LEPOINT.FR*. In Spain the online sites of newspapers *El Mundo* and *ABC* are number 13 and 16 respectively. For German children just *CNN International*

In Part II of this report, we looked at samples of on demand services for children. For the four countries in the ComScore study, the data reveals that the services of Disney and Cartoon Network are present on the list in every country. The Disney site is number 1 in Spain, number 4 in France and the UK, and number 5 in Germany.

#### **4.6 Viewing of XXX Adult websites by children**

In the context of another study, we have analysed data on the viewing of pornographic websites by children, based on comScore data. A first analysis of data available for the full month of December 2012 shows the following :

- 1,645 million of children, i.e.13,8 % of the children who have seen online video during the month, have viewed XXX Adult websites.
- The proportion of children who have seen videos on XXX Adult website is higher for the boys (19.6 %) than for the girls (7,5 %).
- UK is the country with the highest proportion of children viewing XXX Adult websites (16,2 %), followed by France (13,7 %), Spain (13,2 %) and Germany (11.2%).
- In UK, 22,8 % of the boys have viewed XXX Adult websites against 21.3 % in France, 13,2 % in Spain and 11,2 % in Germany.
- The number of videos per viewer, the minutes per viewer and the minutes per video are generally higher for children watching Adult XXX websites.
- Viewing XXX Adult websites represents 26.5 % of the total online video viewing time for the children of the 4 countries. The proportion is of 45,7 % for Spain, 33.2 % for France, 27,2 % in UK. 17,4 % for Germany
- Viewing XXX Adult websites represent 52,8 % of the video online viewing times of boys in Spain, 39.5 % in France, 34;2 % in UK , 27 % in Germany.

The most viewed websites are generally platforms with mainly content provided by the users, as well as advertising for, other services or paying premium videos. The leading services are generally based in the US and therefore outside of the European jurisdiction, in

particular outside of the remit of the AVMS Directive. Those services may include occasionally videos representing violent sex, or child pornography.

#### 4.6.1 Summary

The fact that children have access to adult content online is already documented in various studies.<sup>25</sup> Those studies are generally based on interviews. What is interesting about the data provided by comScore Videometrix includes the fact that:

1° they are based on measures of practices and not only on declaration

2° they are based on measurement of fixed Internet viewing. The growing access to Internet by mobile device (Smartphones, tablets) by children may lead to higher figures as for access to XXX Adult websites.

3° comScore Videometrix data indicate the fact that children viewing XXX websites view more video and view them during a longer period of time. This seems to indicate that viewing of XXX Adult websites by children is not accidental (as indicated in most of the existing studies) but a voluntary and recurrent practice by a significant portion of children, in particular boys.

4° most of the leading XXX Adult websites viewed by children have absolutely no warning labels.

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<sup>25</sup> See for example, *Protecting children from harmful content*, Report prepared for the Council of Europe's Group of Specialists on Human Rights in the Information Society by Andrea Millwood Hargrave, 2009. [http://www.coe.int/t/dghl/standardsetting/media/Doc/H-Inf%282009%2913\\_en.pdf](http://www.coe.int/t/dghl/standardsetting/media/Doc/H-Inf%282009%2913_en.pdf)

## Conclusions

This report on children's use of audiovisual services in Europe has highlighted the importance of the family home as an environment where children tend to make first contact with media. It is not only the equipment owned by households but also the user patterns of parents and other family members that tend to influence children and their levels of media literacy. In this way, the home environment becomes an important factor in shaping children's user patterns and competencies regarding media.

An analysis of data from national regulatory authorities and other research has shown that in terms of equipment, television continues to have the highest penetration in households with children in four major European countries, closely followed by Internet access. Games consoles are another common device owned by households with children. Although television and Internet have reached similar penetration levels in homes with children it is still the case that children spend more time watching television rather than on the Internet as there are certain access barriers connected with using a PC or laptop. This is further supported by low levels of individual Internet access below 15%. Children's user patterns start to change with increasing age when preferences start shifting away from television towards PC and online activities.

The same data also shows that games consoles are among the most likely media equipment owned by children in France, Germany and the UK. Other common devices are mobile phones and television sets.

Data on broadband homes throughout Europe reveal wide disparities between countries as regards access to high-speed Internet which is necessary for using on-demand services. Hence, the hype regarding new services and digital media needs to be tempered with the realisation that many homes and hence millions of children in Europe do not have easy access to such services. Traditional media outlets, and in particular, television still plays an important role in informing and entertaining children.

The research looked at the development, availability and distribution of children's audiovisual, using data from the MAVISE database. Among other things, this shows a major expansion period between 2006 and 2010 when US owned pan-European channels such as Disney, Cartoon Network, Nickelodeon and Boomerang expanded their services throughout Europe.

While both public and private children's channels exist, the majority tend to be private. The role of US companies (based in Europe) and their pan-European channels proves very significant as regards children's television: Walt Disney, Viacom, Liberty Global etc. One

example of a significant public channel is the German channel KIKA, available in 16 European countries.

Such channels are widely distributed on the pay packages. The extent to which children's channels appear on free DTT is rather limited and they tend to be just the public service channels. The development of on demand services for children mirrors that of the television services, with some strong national companies but a dominance of the pan-European brands.

Looking at the top five television programmes broadcast in 2012 in terms of reaching the greatest number of children, the research revealed striking differences between countries regarding the role of private and public broadcasters and illustrated the most important channels and broadcasters when it comes to reaching large numbers of children. Countries where private channels are the strongest numbered 18, while in seven the public channels are dominant for child audiences. Another group of countries reveals a balance between the two (six countries).

The data allows us to see which broadcasters are more significant as regards the top programmes viewed by children. In the case of Central European Media Enterprises (CME), its channels almost completely dominate the market for the children's audience in Bulgaria, the Czech Republic, Romania, Slovakia and Slovenia. The RTL Group fully dominates the children market in Hungary, the Netherlands and the French Community of Belgium. The Modern Times Group (Sweden) entirely dominates regarding the top five in Estonia, Latvia and Lithuania. Another important broadcaster for child audiences that operates across borders is Mediaset (Spain and Italy).

Regarding public service companies, there is again evidence of the popularity of the German public service channel KIKA which is broadcaster of four out of the top five children's programmes in Austria, and three of the top five children's programmes in Germany in 2012.

Particular genres of programmes appeared in the top five for each country. While the top five programmes reveal particular trends across Europe, it is important to note that a top ten may have increased the type of genres that appeared. For example, in many countries there are no news programmes in the top five, whereas the numbers 6, 7, 8, 9 or 10 may have been news programmes. News and information programming featured most prominently in Austria, Germany, Portugal, Romania and Spain. At least one news programme appears in the top five programmes for Bulgaria, Bosnia and Herzegovina, Cyprus, the "former Yugoslav Republic of Macedonia" and Denmark. Public news programmes are somewhat more successful in attracting children's audiences.

We examined the prevalence of those types of programming that traditionally target children such as films, animation, animated TV series, and animated films. All five top programmes in two countries fall into this category (Poland and the Czech Republic), four of five top programmes in six countries and three of the top five programmes in a further five countries are in this category. Almost 70% of movies, animated TV series and animated movies that appear in the top five are US productions. The countries that do not feature this genre at all include Bulgaria, “Former Yugoslav Republic of Macedonia”, Romania and Turkey, the Belgian Flemish Community, the United Kingdom, and the Netherlands, Portugal, France and Cyprus. These countries tend to have other genres such as telenovelas, talent shows or local drama that feature more prominently.

As was the case with popular programmes for young adult and teenage audiences, an important genre was that of the “talent show” which proved popular throughout Europe. Such contests feature in the top five for 17 countries in this report - which is less than the data for youth audiences (26 countries).

Regarding the relative importance of domestic or foreign content, among the top five programmes that most appeal to children audiences national productions account for 52% (including international formats), US productions for 26% and European productions for 10%. It is important to note that many of the “home produced” programmes that feature in the top five are based on international formats. In six countries, the most popular television programmes for children are home produced (France, the Netherlands, Romania, Serbia, Turkey and the United Kingdom). In another six countries 4/5 programmes that most appeal to children audiences are home productions (Belgian Flemish community, Cyprus, Denmark, Finland, Portugal and Sweden). In contrast, the importance of US programmes for children is most pronounced in the Belgian French Community, the Czech Republic, Estonia, Lithuania and Latvia.

Overall as regards trends, one could speak about countries where films, cartoons and animated films are the most important – and these are largely East European countries (Czech Republic, Poland, the Belgian French Speaking community, Estonia, Croatia, Lithuania, Latvia and the Slovak Republic). A separate set of countries includes those where children are likely to be watching drama, soap operas or telenovelas - often programming that targets a general or adult audience (Bosnia, Bulgaria, Montenegro, Portugal, Serbia and especially Turkey). This could also be a reflection of the favoured programmes in a family context. For other countries, talent shows and musical programmes are dominant (the UK, the Netherlands, Denmark, Sweden, Belgium (VLG) and Italy).

For the purposes of this report, data from the measurement of online video viewing, provided by comScore were also analysed. These data were only available for four

countries. Regarding the time spent viewing videos online, the data showed that children do this much less than teenagers or the general population. comScore results show that children spent between one third (Germany), 25% (United Kingdom) and 20% (Spain and France) of the average user time watching videos online. In comparison to online activities of 15 to 24 year olds, whose average user time watching videos online is well above the average population, children spend significantly less time with online videos. The reasons for this are most likely to be found in parental supervision, lower levels of autonomy regarding media use and different leisure interests that do not involve media.

As with young people, the most important category of video accessed online is that of “entertainment” featuring music, television, film or “multimedia”. The category of “News and Information” ranks highest in the United Kingdom (6<sup>th</sup> place). Compared to the total viewing time, the audience market share for “News and Information” videos is very low in the 4 countries that form part of the comScore data. This reflects generally lower levels of news consumption among children than among older age groups. Another significant type of website visited is that of advertising sites. In the case of corporate presence/advertising videos it can be assumed that this is not content actively sought by children audiences but content which targets them or surrounds other content.

In relation to the online video services of traditional media outlets, and in particular the on demand services of children’s channels, the data revealed that these video services do not have a very strong presence in the overall top 20 sites for children. However, the public service channels in the UK dominate the top 5 for media outlet websites, while in other countries the private channels are stronger. In all cases the services of pan-European channels such as Disney, Nickelodeon and Cartoon Network are strongly represented in the top 20 for media outlets.

Those media outlets that particularly provide news are more important for children in the UK who are more likely to access online news services (5 of the top 20), than children in other countries. This contrasts with the findings regarding viewing of television news programmes, where for the UK they did not feature at all in the top five. France follows in second place with three news media outlets in the top 20.

The final section of the comScore analysis looked at the extent to which children access adult video content online and revealed some worrying data regarding the viewing of XXX content by children, specifically boys.



## Part V. Country Reports

This report originally contained some detailed audience information provided by Eurodata TV Worldwide and their relevant partners, which were removed due to copyright restrictions.

## A.1 Austria (AT)

### Channel Distribution 2013

Austria does not have its own children's channel, and the main national channels available are from Germany. There are no children's channels available on DTT (early 2013). All of the major pan-European children's channels are available via cable or satellite. In terms of audience shares the German national public channel KIKA scores higher (in 2011) than the private pan-European channel Nickelodeon (Germany).

TABLE AT1: NATIONAL AND FOREIGN CHILDREN'S CHANNELS AUSTRIA			
Channel name	Statute	Country of origin	Distribution
Junior	Private	Germany	Cable, satellite
KIKA	Public	Germany	Cable, IPTV
KIKA HD	Public	Germany	Cable, IPTV
Super RTL	Private	Germany	Satellite
Super RTL HD	Private	Germany	Satellite

Source: OBS / MAVISE database May 2013

TABLE AT2: PAN EUROPEAN CHILDREN'S CHANNELS IN AUSTRIA					
Channel name	Country of origin	Digital Terrestrial	Cable	IPTV	Satellite package
Boomerang (German)	Germany		x	x	x
Cartoon Network (Germany)	Germany		x	x	x
Disney Channel (Germany)	Germany		x		x
Disney Channel Germany HD	Germany				x
Disney Cinemagic (German)	United Kingdom		x		x
Disney Cinemagic HD Germany	Germany				x
Disney Junior (Germany)	Germany		x	x	x
Disney XD (Germany)	Germany		x	x	x
JimJam ( German)	United Kingdom		x		
KidsCo (version in German) (1)	United Kingdom				x
NICK (Austria)	Germany		x		
NICK Junior (Germany)	Germany		x		
Nickelodeon (Germany)	Germany		x	x	
Nicktoons (Germany)	Germany		x		x
Nickelodeon HD (Germany)	Germany				x

Source: OBS / MAVISE database May 2013

(1) Also available in English, French, German in satellite

TABLE AT3: SAMPLE OF ON DEMAND AUDIOVISUAL SERVICES FOR CHILDREN IN AUSTRIA			
Name of service	Associated TV channel / or operator	Target Country	Country of establishment
Disney (Version in German) @ XboX	Disney Channel (TV)	Germany	United States
Disney Channel Deutschland @ Youtube	Disney Channel Germany (TV)	Germany	Germany
Disney XD Deutschland @ Youtube	Disney XD (TV)	Germany	Germany
Disneynature (Version in German) @ XboX	Disney Nature (TV)	Germany	Germany
JimJam Spielen (CH)	Jimjam (TV)	Switzerland	United Kingdom
Kinderkino		Germany	Germany
Kindersendungen bei UPC On	UPC BROADBAND GMBH	Austria	Austria

Demand!			
Mattel (Version in German) @ XboX		Germany	United States
MSN Kids		Germany	Germany
Nickelodeon @ XbOX	Nickelodeon (TV)	United Kingdom	United Kingdom
Nickelodeon Fanseite @ Youtube	Nickelodeon (TV)	Germany	Germany
Super RTL @ Youtube	Super RTL (TV)	Germany	Germany

Source: OBS / MAVISE database May 2013 – part of on-going survey

### ***Most popular programmes 2012***

The most watched programme among young Austrians aged 3 to 11 years is a national news programme on public generalist television channel ORF1. It should be noted that this choice is likely to be influenced by parents who may watch the programme together with their children before bedtime. All other programmes included in the top five are from the German public children's channel KIKA. With one exception, programmes were produced either in Germany or Belgium/France. As is typical for children's features, programmes are less than 15 minutes long and most are watched on Sundays when children and parents tend to have more free time.

## A.2 Bosnia and Herzegovina (BA)

### *Channel Distribution 2013*

The country has no private national channels. Foreign children's channels available in the country are from Serbia, Italy, Germany and France. In addition Pan-European children's channels are available via cable and IPTV.

<b>TABLE BA1: NATIONAL AND FOREIGN CHILDREN'S CHANNELS BOSNIA AND HERZEGOVINA</b>			
Channel name	Statute	Country of origin	Distribution
Mini Ultra	Private	Serbia	Satellite
Pink Kids	Private	Serbia	Satellite
POPO OTO	Private	Slovenia	Satellite
RAI Gulp	Public	Italy	Satellite
Super RTL	Private	Germany	Satellite
Tiji	Private	France	Satellite

Source: OBS / MAVISE database May 2013

<b>TABLE BA2: PAN EUROPEAN CHILDREN'S CHANNELS BOSNIA AND HERZEGOVINA</b>					
Channel name	Country of origin	Digital Terrestrial	Cable	IPTV	Satellite package
Cartoon Network (Croatian)	United Kingdom		x		
Disney Channel	United Kingdom		x		
Disney XD (Croatian) (1)	United Kingdom		x		
JIM JAM	United Kingdom			x	
Minimax	Czech Republic			x	x
Nickelodeon Germany	Germany				x

Source: OBS / MAVISE database May 2013

(1) Also available in Slovenian on cable

### *Most popular programmes 2012*

The measurement of audience data for Bosnia and Herzegovina among children aged 4 to 14 shows that home produced programmes feature strongly among the top five. There is only one US production in the top five, while all others are national or Bosnian/Croatian or Bosnian/Croatian/Slovenian co-productions. The most popular programme is a Bosnian comedy show which also came in first place among the Bosnian youth audience. Overall, the most popular programmes are largely entertainment although a national newscast comes in second place. This is likely to reflect family viewing rather than the preference of children. However, it does show that children are exposed to news and political affairs programming. All programmes appear on Federalna TV, which is the public service channel of the Federation of Bosnia and Herzegovina.

## A.3 Belgium (BE)

### Channel Distribution 2013

The majority of national and foreign channels available in Belgium as a whole are of French (5), Flemish-Belgium (4), British and German (2) origin and broadcast on cable or IPTV. The pan-European children's channels available in the country are dominated by the Walt Disney Company. British and Dutch broadcasting companies form the biggest group of providers of pan-European children's channels in Belgium. The distribution of those channels is relatively equally divided between cable, IPTV and satellite with a slight emphasis on the first. In terms of audience data private pan-European channel Nickelodeon dominates over public Belgium channel VRT Ketnet.

TABLE BE1: NATIONAL AND FOREIGN CHILDREN'S CHANNELS BELGIUM			
Channel name	Statute	Country of origin	Distribution
Canal J	Private	France	Cable, IPTV
CBBC	Public	United Kingdom	Cable, IPTV
Cbeebies	Private	United Kingdom	Cable, IPTV
Club RTL	Private	Belgium – French Community	DTT, cable, IPTV,
Club RTL HD	Private	Belgium – French Community	Cable, IPTV,
Gulli	Mixed	France	Cable
KIKA	Private	Germany	Satellite
KIKA HD	Private	Germany	Satellite
La Trois	Public	Belgium – French Community	DTT, cable, IPTV, satellite
La Trois HD	Public	Belgium – French Community	DTT, cable, IPTV,
Mangas	Private	France	Cable, IPTV
Pebble TV	Private	Netherlands	Cable,
RAI Gulp	Public	Italy	Satellite
Studio 100 TV	Private	Belgium – Flemish Community	DTT, cable,
Super RTL	Private	Germany	Satellite
Super RTL HD	Private	Germany	Satellite
Télétoon	Private	France	Cable
Tiji	Private	France	Cable, IPTV
VRT Ketnet	Public	Belgium – Flemish Community	DTT, cable, IPTV, satellite
VRT Ketnet HD	Public	Belgium – Flemish Community	IPTV
VTMkzoom	Private	Belgium – Flemish Community	Cable, IPTV, satellite
VTMKzoom +	Private	Belgium – Flemish Community	Cable

Source: OBS / MAVISE database May 2013

TABLE BE2: PAN EUROPEAN CHILDREN'S CHANNELS IN BELGIUM					
Channel name	Country of origin	Digital Terrestrial	Cable	IPTV	Satellite package
Al Jazeera Children's' Channel	Qatar		x		
Baraem	Qatar		x		
Boomerang (French)	United Kingdom		x	x	x
Boomerang (version in Dutch)	United Kingdom		x	x	
Boomerang (version in Greek)	United Kingdom				x
Boomerang Europe	United Kingdom				x
Cartoon Network (Dutch)	United Kingdom		x	x	x
Cartoon Network (French)	United Kingdom		x	x	x

Disney Channel Belgique	France		x	x	
Disney Channel France	France			x	x
Disney Channel Nederland	Netherlands		x		x
Disney Cinemagic ( French)	United Kingdom		x	x	
Disney Junior France	France		x	x	
Disney Junior Nederland	Netherlands		x		
Disney Cinemagic HD France	United Kingdom		x	x	
Disney XD HD (version in Dutch)	Netherlands		x	x	x
Disney XD (Dutch)	Netherlands				x
Disney XD France	France		x	x	
JimJam (Czech)	United Kingdom				x
JimJam (Hungarian)	United Kingdom				x
JimJam (Dutch)	United Kingdom		x		x
JimJam Middle East (version in English)	United Kingdom				x
KidsCo (version in English)	United Kingdom		x		x
KidsCo (version in French)	United Kingdom		x		x
KidsCo (version in German)	United Kingdom		x		x
KidsCo (version in Portuguese)	United Kingdom		x		
Kidsco (version in Spanish)	Spain		x		x
NICK (Austria)	Germany				x
Nick Hits	Netherlands		x	x	
Nick Jr. (Belgium)	Netherlands		x	x	
Nick Jr. (Netherlands)	Netherlands		x		
Nickelodeon (France)	United Kingdom		x	x	x
Nickelodeon (Germany)	Germany				x
Nickelodeon (version in Dutch)	Netherlands	x	x	x	x
Nickelodeon Junior (France)	United Kingdom		x	x	
Nickelodeon Wallonia	Belgium – French Community			x	
NickToons (Netherlands)	Netherlands		x	x	
Nickelodeon HD	United Kingdom			x	

Source: OBS / MAVISE database May 2013

<b>TABLE BE3: SAMPLE OF ON DEMAND AUDIOVISUAL SERVICES FOR CHILDREN BELGIUM</b>			
Name of service	Associated TV channel / or operator	Target Country	Country of establishment
Bandai Channel @ Xbox		United States (specific European services)	United States
Disney Channel (NL) (Catch-up)	Disney Channel Nederland (TV)	Netherlands/ Belgium-Flemish Community	United Kingdom
Disney (Version in Dutch) @ Xbox	Disney Channel Nederland (TV)	Netherlands/ Belgium-Flemish Community	United States
Disney (Version in French) @ Xbox		France/ Belgium- French Community	United States
Disneynature @ Xbox	Disney Nature TV	United States (specific European services)/Belgium-Flemish Community	United States
JimJam Spellen (NL)	Jimjam (TV)	Netherlands/ Belgium-Flemish Community	United Kingdom
Jetix Europe @ Youtube		Netherlands/ Belgium-Flemish Community	United Kingdom
Kids à la carte	Telenet cable operator (Liberty Global)	Belgium	Belgium
Kids Pass (Version in Dutch)	Belgacom cable operator	Belgium	Belgium
Kids Pass (Version in French)	Belgacom cable operator	Belgium	Belgium
Mattel @ Xbox		United States (specific European services)	United States
Nickelodeon Replay (Version in Dutch)	Nickelodeon (version in Dutch) (TV)	Belgium- Flemish Community	Netherlands

Nickelodeon (catch-up) (Version in Dutch)	Nickelodeon (TV)	Netherlands	Netherlands
Official Disney XD (NL) @ Youtube	Disney XD (Dutch) (TV)	Netherlands/ Belgium-Flemish Community	United Kingdom

Source: OBS / MAVISE database May 2013 – part of on-going survey

### ***Most popular programmes 2012 in the French speaking community***

Four US movies and one television series are in the top list of programmes watched by Belgian children in the French Community all of which are broadcast on the private Luxembourg based channel RTL. None of these programmes includes news or current affairs and can be considered as pure entertainment content.

### ***Most popular programmes 2012 in the Flemish speaking community***

Belgian children in the Flemish community favour fiction, general knowledge and entertainment programmes in their top five, with three broadcast by the public service channel Één. With one exception all programmes are Belgian productions. The majority of these programmes are watched during peak evening time on weekends when both children and parents tend to have more spare time available. The most popular programmes watched by Belgian children aged 4 to 14 tend to be longer features with a minimum length of half an hour and a maximum of over two hours.

## A.4 Bulgaria (BG)

### Channel Distribution 2013

Bulgaria has two private children's channels: Super 7 and DKTE (Ekids). Other foreign children's channels available in the country include the German public channel KIKA and private Super RTL as well as the Turkish private channel Yumurcak TV. Pan-European children's channels are mainly provided by British, Russian and German broadcasters. In terms of audience data of children's channels just two register some data for 2011, with the Bulgarian version of the Disney Channel reaching a higher audience than the national channel Super 7.

TABLE BG1: NATIONAL AND FOREIGN CHILDREN'S CHANNELS BULGARIA			
Channel name	Statute	Country of origin	Distribution
DKTE (Ekids)	Private	Bulgaria	Satellite/ Cable
KIKA	Public	Germany	Cable / IPTV
KIKA HD	Public	Germany	Satellite
Super 7	Private	Bulgaria	Satellite/ Cable/ IPTV
Super RTL	Private	Germany	Cable / IPTV
Super RTL HD	Private	Germany	Satellite
Yumurcak TV	Private	Turkey	IPTV

Source: OBS / MAVISE database May 2013

TABLE BG2: PAN EUROPEAN CHILDREN'S CHANNELS BULGARIA					
Channel name	Country of origin	Digital Terrestrial	Cable	IPTV	Satellite package
Boomerang (Bulgarian) (1)	United Kingdom		X	X	X
Boomerang Europe	United Kingdom		X	X	
Cartoon Network (Bulgarian)	United Kingdom		X	X	X
Cartoon Network Europe	United Kingdom		X	X	
Disney Channel (Bulgarian) (2)	United Kingdom		X	X	X
Disney Junior (Bulgaria)	United Kingdom				X
Detskij Mir	Germany (Russian)		X	X	
JimJam (Version in Bulgarian)	United Kingdom		X	X	
NICK Junior (Germany)	Germany			X	
Nick Junior UK	United Kingdom			X	
Nickelodeon UK (1)	United Kingdom		X		
Nickelodeon HD	United Kingdom				X
Karusel International	Russia			X	

Source: OBS / MAVISE database May 2013

(1) Also available on satellite in Hungarian and Romanian

(2) Available on satellite in Romanian

### Most popular programmes 2012

The audience data measurement for Bulgaria shows that the most popular programme for children aged 4 to 14 is a local version of a talent show format, which is also the most popular programming for the youth audience. All of the most popular programmes for children and youth are broadcast by the bTV channel (Central European Media Enterprises - CME). The evening news also features in the top five programmes for both age groups.



The predominant genre, however, is entertainment with a number of different domestic and Turkish produced series. Most programmes are aired during evening prime time during the week.

## A.5 Cyprus (CY)

### Channel Distribution 2013

Cyprus has one private national children's channel that is available on Pay DTT and IPTV and it is the only channel that registers an audience share. All the main pan-European US channels are available, and also the Al Jazeera children's channel.

TABLE CY1: NATIONAL AND FOREIGN CHILDREN'S CHANNELS CYPRUS			
Channel name	Statute	Country of origin	Distribution
LTV1 (Lumiere TV1)	Private	Cyprus	Pay DTT, IPTV

Source: OBS / MAVISE database May 2013

TABLE CY2: PAN EUROPEAN CHILDREN'S CHANNELS IN CYPRUS					
Channel name	Country of origin	Digital Terrestrial	Cable	IPTV	Satellite package
Al Jazeera Children's' Channel	Qatar				x
Boomerang (Greek)	United Kingdom			x	x
Boomerang Europe	United Kingdom		x	x	
Cartoon Network Europe	United Kingdom		x	x	
Disney Channel (Greece)	Greece		x	x	x
Disney Channel (English)	United Kingdom				x
Disney Junior	United Kingdom		x		
Disney XD (Greek)	United Kingdom				x
JimJam Middle East (Greek)	United Kingdom		x		
Karusel International	Russian Federation		x		
KidsCo (Greek)	United Kingdom		x	x	
Nickelodeon (Greek)	United Kingdom				x

Source: OBS / MAVISE database May 2013

TABLE CY3: SAMPLE OF ON DEMAND AUDIOVISUAL SERVICES FOR CHILDREN CYPRUS			
Name of service	Associated TV channel / or operator	Target Country	Country of establishment
Primatel Prime kids VOD		Cyprus	Cyprus

Source: OBS / MAVISE database May 2013 – part of on-going survey

### Most popular programmes 2012

Cypriot children aged 4 to 14 tend to watch more series and light entertainment. Apart from that, a daily newscast also features in the top five children's programmes. Programmes are broadcast on the Cypriot version of one of the major Greek commercial channels ANT1, the Cypriot public channel RIK 1 and the main private Cypriot channel SIGMA. The majority of programmes are of national origin and are broadcast during peak evening times at the end of the week and on weekends.

## A.6 Czech Republic (CZ)

### Channel Distribution 2013

The Czech Republic has two private children's channels: CS Mini and Minimax. Minimax is also a type of pan-European children's channel with versions in Romanian and Hungarian, and is also available in a wide range of countries. The public service broadcaster plans to launch a new children's channel for 4-12 year olds called CT:D at the end of August 2013. The two main German channels KIKA and Super RTL are distributed via cable. In terms of audience data for children's channels the Czech version of the Disney Channel scores a little higher than the national Minimax. Audiovisual services for children are provided by Czech based companies CS MINI, Disney Channel and JimJam.

TABLE CZ1: NATIONAL AND FOREIGN CHILDREN'S CHANNELS CZECH REPUBLIC			
Channel name	Statute	Country of origin	Distribution
CS Mini	Private	Czech Republic	Satellite/ Cable/ IPTV
Minimax (1)	Private	Czech Republic	Satellite/ Cable/ IPTV
KIKA	Public	Germany	Cable
KIKA HD	Public	Germany	Satellite
Super RTL	Private	Germany	Cable
Super RTL HD	Private	Germany	Satellite

Source: OBS / MAVISE database May 2013

(1) Also available in Hungarian, Romanian on satellite

TABLE CZ2: PAN EUROPEAN CHILDREN'S CHANNELS CZECH REPUBLIC					
Channel name	Country of origin	Digital Terrestrial	Cable	IPTV	Satellite package
Boomerang (Czech)	United Kingdom		x	x	x
Boomerang (Arabic) (1)	United Kingdom				x
Boomerang Europe (2)	United Kingdom			x	
Cartoon Network Europe	United Kingdom			x	x
Disney Channel (Czech) (2)	United Kingdom		x	x	x
Disney Junior	United Kingdom			x	
JimJam (Czech) (3)	United Kingdom		x	x	
Karusel International	Russia			x	
Nickelodeon (Czech) (4)	United Kingdom		x	x	
Nickelodeon HD Europe	United Kingdom		x		
Nick Junior UK	United Kingdom		x		

Source: OBS / MAVISE database May 2013

(1) Also available in Greek, Hungarian, Polish, Romanian on satellite

(2) Also available in Hungarian, Romanian on satellite

(3) Also available in English, Romanian on satellite

(4) Also available in German, Hungarian, Romanian, Russian on satellite

TABLE CZ3: SAMPLE OF ON DEMAND AUDIOVISUAL SERVICES FOR CHILDREN CZECH REPUBLIC			
Name of service	Associated TV channel / or operator	Target Country	Country of establishment
Disney Channel CZ @ Youtube	Disney Channel (TV)	Czech Republic	Czech Republic
JimJam Hry (CZ)	JimJam (TV)	Czech Republic	Czech Republic
Minimax @ Youtube	Minimax (TV)	Czech Republic	Czech Republic
Portál CS mini	CS MINI (TV)	Czech Republic	Czech Republic
Web Portal animaxo		Czech Republic	Czech Republic

*Source: OBS / MAVISE database May 2013 – part of on-going survey*

### ***Most popular programmes 2012***

The Czech audience data collection reveals the popularity of US films for children's audiences. Only one movie in the top five is a national production. The viewing patterns are quite different to teenagers and young adults (15-24 and 25-34 years) who prefer programmes that are produced in the Czech Republic (or are older movies produced in the former Czechoslovakia) and talent shows. All of the top programmes are broadcast by TV Nova, the main private broadcaster owned by the pan-European company Central European media Enterprises. All programmes are aired during peak time in the evening on Saturdays when both children and parents tend to have more time.

## A.7 Germany (DE)

### Channel Distribution 2013

The majority of German children's channels is private and it is KIKA and Super RTL that are also available on free DTT. The latest addition is RIC TV, which was launched in 2012. It is described as targeting children from at 3 to 13 years old, who live outside the major metropolitan areas. The channel claims to broadcast programmes of mainly European origin, of high quality content and to be free from violence. Pan-European children's channels are largely dominated by German based US broadcasting companies of which Nickelodeon (Germany) is the only one available on DTT. The main forms of distribution are via cable and satellite. In terms of audience shares private national channel Super RTL dominates over public national channel KIKA and private Pan-European channel Nick Junior (Germany). The majority of on demand audiovisual services for children are provided by private Pan-European channels (see more detail in table DE3).

TABLE DE1: NATIONAL AND FOREIGN CHILDREN'S CHANNELS GERMANY			
Channel name	Statute	Country of origin	Distribution
Junior	Private	Germany	Cable, satellite
KIKA	Public	Germany	DTT, cable, IPTV
Super RTL	Private	Germany	DTT, cable, satellite, IPTV
KIKA HD	Public	Germany	IPTV
RIC TV	Private	Germany	Satellite
Super RTL HD	Private	Germany	Satellite

Source: OBS / MAVISE database May 2013

TABLE DE2: PAN EUROPEAN CHILDREN'S CHANNELS IN GERMANY					
Channel name	Country of origin	Digital Terrestrial	Cable	IPTV	Satellite package
Al Jazeera Children's' Channel	Qatar		X		
Boomerang (German)	Germany		X	X	X
Cartoon Network (Germany)	Germany		X	X	X
Disney Channel Germany	Germany		X	X	X
Disney Channel Germany HD	Germany				X
Disney Cinemagic (version in German)	United Kingdom		X	X	X
Disney Channel Germany HD	Germany				X
Disney Cinemagic HD Germany	Germany		X		X
Disney Junior (Germany)	Germany		X	X	X
Disney XD (Germany)	Germany		X	X	X
KidsCo (version in German)	United Kingdom		X		
NICK Junior (Germany)	Germany		X		
Nickelodeon (Germany)	Germany	X	X	X	
Nicktoons (Germany)	Germany		X		X
Nickelodeon HD (Germany)	Germany				X

Source: OBS / MAVISE database May 2013

TABLE DE3: SAMPLE OF ON DEMAND AUDIOVISUAL SERVICES FOR CHILDREN IN GERMANY			
Name of service	Associated TV channel / or operator	Target Country	Country of establishment
Baby TV On Demand (Version in German)	Baby TV (TV)	Germany	United Kingdom
Boomerang auf Abruf	Boomerang (TV)	Germany	Germany
Cartoon @ iTunes Store DE		Germany	Germany
Cartoon Network auf Abruf	Cartoon Network (TV)	Germany	Germany
Cartoon Network Deutschland @ Youtube	Cartoon Network (TV)	Germany	Germany
Cinemagic DE @ Youtube	Cinemagic (TV)	Germany	Germany
Disney (Version in German) @ XboX		Germany	United States
Disney Channel Deutschland @ Youtube	Disney Channel (TV)	Germany	Germany
Disney Channel @ iTunes Store DE	Disney Channel (TV)	Germany	Germany
Disney Channel auf Abruf	Disney Channel (TV)	Germany	Germany
Disney Channel Junior @ iTunes Store DE	Disney junior (TV)	Germany	Germany
Disney Junior (Germany) auf Abruf	Disney Junior (TV)	Germany	Germany
Disney XD @ iTunes Store DE	Disney XD (TV)	Germany	Germany
Disney XD Deutschland @ Youtube	Disney XD (TV)	Germany	Germany
Disney XD auf Abruf	Disney XD (TV)	Germany	Germany
Disneynature (Version in German) @ XboX	Walt Disney Inc	Germany	Germany
DISNEY.DE		Germany	Germany
JimJam Spielen (CH)	Jimjam (TV)	Switzerland	United Kingdom
juki		Germany	Germany
KIKAplus	KIKA (TV)	Germany	Germany
Mattel (Version in German) @ XboX		Germany	United States
MSN Kids		Germany	Germany
Kinderkino		Germany	Germany
Nick.ch videos	Nick (TV)	Switzerland	Germany
NICK.DE	Nick (TV)	Germany	Germany
Nickelodeon @ iTunes Store DE	Nickelodeon (TV)	Germany	Germany
Nickelodeon Fanseite @ Youtube	Nickelodeon (TV)	Germany	Germany
NICKJR.DE	Nick Jnr (TV)	Germany	Germany
Studio 100 @ iTunes Store DE		Germany	Germany
SUPER RTL NOW	Super RTL (TV)	Germany	Germany
Super RTL @ Youtube	Super RTL (TV)	Germany	Germany
Videoload Kids Selection bei Deutsche Telekom	DEUTSCHE TELEKOM AG	Germany	Germany

Source: OBS / MAVISE database May 2013 – part of on-going survey

### **Most popular programmes 2012**

Children in Germany (3 to 13) years show a distinct viewing pattern, favouring two news programmes by the public broadcasters ZDF and ARD over fiction content in the top five programmes table. This political interest is also a distinct feature of young people (14 to 19 and 20 to 29 years) who also favour news programmes as their first and second choice. Children, however, are most likely to watch these programmes in the company of their parents who may influence this choice of programming. Nonetheless, this means that children are exposed to political information. It is worth noting that all top 5 programmes are

exclusively from public service broadcasters with national productions dominating over other European and European-Transatlantic co-operations. In fact, the public service children's channel KIKa is extremely popular with German children, as regards the top viewed shows. As regards the audience in general, Super RTL scored a higher audience share in 2011.

## A.8 Denmark (DK)

### Channel Distribution 2013

In Denmark has two national public service children's channels. DR Ultra was launched on 4 March 2013, replacing the news channel DR Update. It is aimed at children aged 7-12. In addition, the Norwegian and Swedish public channels NRK Super and SVTB and the German private channel Super RTL are available. The private pan-European channels Cartoon Network (version in Danish), Disney Channel Scandinavia (version in Danish) and Disney XD (version in Danish) are available on the Pay DTT package. In terms of audience shares the Danish public children's channel DR Ramasjang leads the table, followed by a group of private pan-European channels. Apart from some major pan-European channels DR Ramasjang and DR Ultra also offer on demand audiovisual services for children.

TABLE DK1: NATIONAL AND FOREIGN CHILDREN'S CHANNELS DENMARK			
Channel name	Statute	Country of origin	Distribution
DR Ramasjang	Public	Denmark	DTT, Cable, IPTV, satellite
DR Ultra	Public	Denmark	DTT, Cable, IPTV
NRK Super	Public	Norway	Satellite
Super RTL	Private	Germany	Cable
SVTB	Public	Sweden	Satellite

Source: OBS / MAVISE database May 2013

TABLE DK2: PAN EUROPEAN CHILDREN'S CHANNELS IN DENMARK					
Channel name	Country of origin	Digital Terrestrial	Cable	IPTV	Satellite package
Boomerang (Danish) (1)	United Kingdom		x	x	x
Cartoon Network (Danish) (2) (3)	United Kingdom	x	x	x	x
C MORE Kids (Danish) (2)	Sweden				x
Disney Channel (Danish) (2)	United Kingdom	x	x	x	x
Disney Channel HD (Danish)	United Kingdom		x		
Disney Junior (Danish) (2)	United Kingdom		x	x	x
Disney XD (Danish) (2) (4)	United Kingdom	x	x	x	x
Nick Junior (version in Danish)	United Kingdom		x	x	x
Nick Junior (version in Russian)	United Kingdom				x
Nick Junior (version in Swedish)	United Kingdom				x
Nickelodeon (Danish) (2)	The Netherlands		x	x	x
Nickelodeon HD Europe	Czech Republic		x	x	

Source: OBS / MAVISE database May 2013

(1) Also available in Norwegian, Swedish on satellite

(2) Also available in Finnish, Norwegian, Swedish on satellite

(3) Also available in Russian on satellite

(4) Also available in English on satellite

TABLE DK3: SAMPLE OF ON DEMAND AUDIOVISUAL SERVICES FOR CHILDREN IN DENMARK			
Name of service	Associated TV channel / or operator	Target Country	Country of establishment
Bandai Channel @ Xbox		United States (specific European services)	United States
Cartoon Network (DK) (catch	Cartoon Network (TV)	Denmark	United Kingdom



up)			
DR Ramasjang (catch-up)	DR Ramasjang (TV)	Denmark	Denmark
DR Ultra (catch-up)	DR Ultra (TV)	Denmark	Denmark
Disney Channel (DK) (catch-up)	Disney Channel (TV)	Denmark	United Kingdom
Disney Junior (DK) (catch-up)	Disney Junior (TV)	Denmark	United Kingdom
Disney XD (DK) (catch-up)	Disney XD (TV)	Denmark	United Kingdom
Mattel @ XboX		United States (specific European services)	United States
Nickelodeon (catch-up) (Version in Danish)	Nickelodeon (TV)	Denmark	Netherlands

Source: OBS / MAVISE database May 2013 – part of on-going survey

### **Most popular programmes 2012**

Three of the most popular programmes watched by Danish children (4 to 14) years are music casting shows. This is similar to the preferences of young people aged 15 to 34 that prefer to watch music and entertainment programmes. Another programme included in the top five is a Danish newscast. The newscast scored higher with young people than children, coming in second place. Apart from Danish productions, the top five ranks hold only one US made programme. All of these top programmes are broadcast on the Danish public television channel DR1. Together, the two Danish public broadcasters TV2 and DR1 regularly attract more than half of average daily audiences. All programmes are watched during peak evening times on Fridays and Saturdays when both children and parents tend to have more leisure time.

## A.9 Estonia (EE)

### Channel Distribution 2013

The majority of national and foreign children's channels available in Estonia are private channels from Germany. Most of the pan-European children's channels are from British based US broadcasting companies, but also include the 4 multimanía brand from Latvia, and several Russian channels. Two versions of the Cartoon Network Europe (English and Russian language) appear on the Pay DTT networks.

TABLE EE1: NATIONAL AND FOREIGN CHILDREN'S CHANNELS ESTONIA			
Channel name	Statute	Country of origin	Distribution
Detskij Mir	Private	Germany	Cable
Detskij	Private	Russia	Satellite
DR Ramasjang	Public	Denmark	Satellite
KIKA	Public	Germany	Cable, IPTV
KIKA HD	Public	Germany	Satellite
NRK Super	Public	Norwegian	Satellite
Super RTL	Private	Germany	Cable, IPTV
Super RTL HD	Private	Germany	Satellite
SVTB	Public	Sweden	Satellite
Ulibka Rebyonka (Smile TV)	Private	Russian Federation	Cable

Source: OBS / MAVISE database May 2013

TABLE EE2: PAN EUROPEAN CHILDREN'S CHANNELS IN ESTONIA					
Channel name	Country of origin	Digital Terrestrial	Cable	IPTV	Satellite package
4 multimanía (Estonian) (1)	Latvia			x	
Boomerang Europe	United Kingdom		x	x	
Boomerang (Russian) (3)	United Kingdom				x
Cartoon Network (Russian)	United Kingdom	x	x		x
Cartoon Network Europe (3)	United Kingdom	x	x	x	
Disney Channel	United Kingdom		x	x	
Disney Channel (Danish)	United Kingdom		x	x	x
Disney Channel (Finnish)	United Kingdom		x	x	x
Disney Channel (Norwegian)	United Kingdom		x	x	x
Disney Channel (Swedish)	United Kingdom		x	x	x
Disney Junior	United Kingdom		x	x	x
Disney Junior (Danish)	United Kingdom		x	x	x
Disney Junior (Finnish)	United Kingdom		x	x	x
Disney Junior (Norwegian)	United Kingdom		x	x	x
Disney Junior (Swedish)	United Kingdom		x	x	x
Disney XD (UK + Ireland) (3)	United Kingdom			x	x
Disney XD UK HD	United Kingdom		x		
Karusel International	Russian Federation		x		
Nick Junior (version in Danish)	United Kingdom		x		x
Nick Junior (version in Norwegian)	United Kingdom		x		
Nick Junior (version in Russian)	United Kingdom		x		x
Nick Junior (version in Swedish)	United Kingdom		x		x
Nick Junior UK	United Kingdom		x	x	
Nickelodeon (Hungarian)	Czech Republic			x	
Nickelodeon (Norwegian)	The Netherlands			x	x
Nickelodeon (Portuguese)	United Kingdom			x	
Nickelodeon (version in Russian)	United Kingdom		x		

Nickelodeon (version in Swedish)	The Netherlands				x
Nickelodeon UK (3)	United Kingdom		x		

Source: OBS / MAVISE database May 2013

(1) Also available in Lithuanian and Russian on IPTV

(2) Also available in Danish Finnish, Swedish, Norwegian on cable

(3) Also available in Danish, Finnish, Norwegian, Swedish on satellite

<b>TABLE EE3: SAMPLE OF ON DEMAND AUDIOVISUAL SERVICES FOR CHILDREN IN ESTONIA</b>			
Name of service	Associated TV channel / or operator	Target Country	Country of establishment
Cartoon Network (Russian) (catch-up)	Cartoon Network (Russian)	Russian Federation	United Kingdom

Source: OBS / MAVISE database May 2013 – part of on-going survey

### **Most popular programmes 2012**

Four of the most popular programmes watched by Estonian children (4 to 14 years) are US movies. The other foreign production in the top five children programmes is a Lithuanian series. All programmes are broadcast on the private entertainment channel TV3 and run during peak evening time mainly on weekends when both children and parents tend to have more free time.

## A.10 Spain (ES)

### Channel Distribution 2013

The Spanish television market includes one public and two private children's channels. In addition a Portuguese channel with a Spanish version specifically targets the Spanish market. The public channel Clan TVE and the private channel Boing are both available over free DTT networks.

In terms of pan-European channels all the top channels are present in Spain, some also in the Catalan language. The Disney channel registered quite a high audience share in 2011, but still far behind the public service children's channel Clan TVE.

Table ES3 provides a sample of some of the on demand services available for children, most of which are from the major pan-European channels.

TABLE ES1: NATIONAL AND FOREIGN CHILDREN'S CHANNELS SPAIN			
Channel name	Statute	Country of origin	Distribution
Boing (Spain)	Private	Spain	Free DTT/ Cable/ Satellite / IPTV
Canal Infancia	Private	Spain	Cable
Clan TVE	Public	Spain	Free DTT/ Cable/ Satellite / IPTV
Canal Panda ( Spanish)	Private	Portugal	Cable/ Satellite/ IPTV

Source: OBS / MAVISE database May 2013

TABLE ES2: PAN EUROPEAN CHILDREN'S CHANNELS SPAIN					
Channel name	Country of origin	Digital Terrestrial	Cable	IPTV	Satellite package
Boomerang Spain (1)			x		
Cartoon Network (Spanish) (1)			x	x	x
Cartoonito (Spain)			x	x	x
Disney Channel España		x	x	x	x
Disney Channel España HD					x
Disney Cinemagic (Spanish)			x	x	x
Disney Cinemagic HD Spain					x
Disney Junior (Spanish)			x	x	x
Disney XD (Spain)			x	x	x
Kidsco (Spanish)				x	
Nickelodeon (Spanish) (2)			x	x	x
Nick Junior (Spanish)			x		x

Source: OBS / MAVISE database May 2013

(1) Also available in Catalan

(2) Also available in Portuguese on satellite

TABLE ES3: SAMPLE OF ON DEMAND AUDIOVISUAL SERVICES FOR CHILDREN IN SPAIN			
Name of service	Associated TV channel / or operator	Target Country	Country of establishment
Bandai Channel (Version in Spanish) @ XboX		Spain	United States
Boing @ Youtube (Spain)	Boing (TV)	Spain	Spain
Cartoon Network Espana @ Youtube	Cartoon Network (TV)	Spain	United Kingdom
Crunchyroll (Version in Spanish)		United States (specific European services)	United States
DHX Junior TV France-Français @ Youtube		Canada	United States
DHX Kids TV France @ Youtube		Canada	United States

DHX Retro TV France @ Youtube		Canada	United States
Disney Channel Espana @ Youtube	Disney Channel (TV)	Spain	Spain
Disney (Version in Spanish) @ XboX	Disney Channel (TV)	Spain	United States
Disneynature (Version in Spanish) @ XboX		Spain	United States
Disney XD Espana @ Youtube	Disney XD	Spain	Spain
Mattel (Version in Spanish) @ XboX		Spain	United States

Source: OBS / MAVISE database May 2013 – part of on-going survey

### ***Most popular programmes 2012***

The Spanish data covers children of the age group 4-12. Similar to data for youth audiences, news programmes appear in the top two for the highest watched programmes in 2012. Aside from this the focus is on entertainment with a talent show format and two American movies/ dramas. There is a reasonable balance between the audience share for children of the public (La 1) and the private (Antena 3 and Tele 5) channels.

## A.11 Finland (FI)

### Channel Distribution 2013

Finland has no public service children's channel, and one private channel MTV3 Juniori which also offers an on demand audiovisual service. It is available on pay DTT service, alongside the Disney Channels and Nickelodeon. Aside from the major pan-European channels, the pay children's channel of the Canal Digital package – C More Kids – also has a Finnish version.

TABLE FI1: NATIONAL AND FOREIGN CHILDREN'S CHANNELS IN FINLAND			
Channel name	Statute	Country of origin	Distribution
MTV3 Juniori	Private	Finland	DTT, cable, IPTV, satellite
DR Ramasjang	Public	Denmark	Satellite
NRK Super	Public	Norway	Satellite
Super RTL	Private	Germany	IPTV
Super RTL HD	Private	Germany	Satellite

Source: OBS / MAVISE database May 2013

TABLE FI2: PAN EUROPEAN CHILDREN'S CHANNELS IN FINLAND					
Channel name	Country of origin	Digital Terrestrial	Cable	IPTV	Satellite package
Boomerang Europe (1)	United Kingdom		x	x	
Cartoon Network (Finnish) (1)	United Kingdom		x	x	x
C MORE Kids (Finnish) (1)	Sweden		x	x	x
Disney Channel (1)	United Kingdom	x			
Disney Channel (Finnish)	United Kingdom	x	x	x	x
Disney Junior (Finnish) (1)	United Kingdom		x	x	x
Disney XD (Finnish) (1)	United Kingdom	x	x	x	x
Nick Junior (version in Russian) (2)	United Kingdom				x
Nickelodeon (Finnish) (1)	The Netherlands	x	x	x	x

Source: OBS / MAVISE database May 2013

(1) Also available in Danish, Norwegian, Swedish on satellite

(2) Also available in Danish, Swedish on satellite

TABLE FI3: SAMPLE OF ON DEMAND AUDIOVISUAL SERVICES FOR CHILDREN IN FINLAND			
Name of service	Associated TV channel / or operator	Target Country	Country of establishment
Bandai Channel @ XboX		United States (specific European services)	United States
Boomerang catch-up (Finnish version)	Boomerang (TV)	Finland	United Kingdom
Cartoon Network (version in Finnish) (catch-up)	Cartoon Network (TV)	Finland	Finland
Disney (Version in Finnish) @ XboX		Finland	United States
Disney Channel Finland (catch up)	Disney Channel (TV)	Finland	United Kingdom
Disney Junior Finland (catch up)	Disney Junior (TV)	Finland	United Kingdom
Disney XD Finland (catch up)	Disney XD (TV)	Finland	United Kingdom
Mattel @ XboX		United States (specific European services)	United States
MTV3 @ Youtube	MTV3 Juniori (TV)	Finland	Finland
Nickelodeon Finland (catch-up)	Nickelodeon (TV)	Finland	Netherlands

Source: OBS / MAVISE database May 2013 – part of on-going survey

***Most popular programmes 2012***

Other than the Finnish youth aged 15-35 who also show an affinity for political news, it is nationally produced entertainment programmes that appeal most to Finnish children (4 to 14). Programmes are broadcast on a variety of different channels including Finnish private generalist channel MTV3, entertainment channels SUBTV and Nelonen as well as public generalist channel YLE2. With one exception, all other programmes are broadcast during peak evening time predominantly at the end of the week and on weekends.

## A.12 France (FR)

### Channel Distribution 2013

The French market has a range of private channels (6) and one channel Gulli that is a joint venture between public and private broadcasters. Gulli is available on the free DTT network and had a quite high overall audience share in 2011. Of the private channels, Canal J is one of the longest established children's channels in Europe. The two major German children's channels are also available in France, alongside the Turkish public channel.

A broad range of pan-European channels are available including several Russian channels and the Al Jazeera children's channel. In addition Table FR3 details a wide range of on demand services over various platforms targeting children. Many of these are from the major Pan-European channels.

TABLE FR1: NATIONAL AND FOREIGN CHILDREN'S CHANNELS FRANCE			
Channel name	Statute	Country of origin	Distribution
Berbère Jeunesse	Private	France	IPTV
Boing (France)	Private	United Kingdom	Cable/ Satellite/ IPTV
Boing TV (Italy)	Private	Italy	Satellite
Canal J	Private	France	Cable/ Satellite/ IPTV
Gulli	Mixed	France	Free DTT/ cable/ satellite / IPTV
KIKA	Public	Germany	IPTV
KIKA HD	Public	Germany	Satellite
Mangas	Private	France	Cable/ Satellite/ IPTV
Piwi+	Private	France	Cable/ Satellite/ IPTV
Super RTL	Private	Germany	IPTV
Super RTL HD	Private	Germany	Satellite
Télétoon	Private	France	Cable/ Satellite/ IPTV
Tiji	Private	France	Cable/ Satellite/ IPTV
TRT Çocuk	Public	Turkey	IPTV

Source: OBS / MAVISE database May 2013

TABLE FR2: PAN EUROPEAN CHILDREN'S CHANNELS FRANCE					
Channel name	Country of origin	Digital Terrestrial	Cable	IPTV	Satellite package
Al Jazeera Children's' Channel	Qatar			x	
Baraem	Qatar			x	
Boomerang (French)	France		x	x	x
Cartoon Network (French)			x	x	x
Detskij Mir	Germany (Russian)			x	
Disney Channel France	France		x	x	x
Disney Channel HD France	France			x	x
Disney Cinemagic (French)	United Kingdom		x	x	x
Disney Cinemagic HD France	United Kingdom		x	x	x
Disney Junior France	France		x	x	x
Disney Junior HD France	France				x
Disney Nature TV				x	
Disney XD France	United Kingdom		x	x	x
Disney XD HD France	United Kingdom				x
Karusel International	Russia			x	
KidsCo (French) (1)	United Kingdom			x	



Nickelodeon (France)	United Kingdom		x	x	x
Nickelodeon Junior (France)	United Kingdom		x	x	x

Source: OBS / MAVISE database May 2013

(1) Also available in Spanish on satellite

TABLE FR3: SAMPLE OF ON DEMAND AUDIOVISUAL SERVICES FOR CHILDREN IN FRANCE			
Name of service	Associated TV channel / or operator	Target Country	Country of establishment
Bandai Channel (Version in French) @ XboX		France	United States
Bangoo		France	France
Bangoo @ iTunes Store FR		France	France
Bangoo @ Youtube		Germany	Germany
Berbère Télévision @ Youtube	Berbère Jeunesse (TV)	France	France
Berbère TV @ Dailymotion	Berbère Jeunesse (TV)	France	France
Boing à la demande	Boing (TV)	France	United Kingdom
Boomerang à la demande	Boomerang (TV)	France	United Kingdom
Boomerang France @ Youtube	Boomerang (TV)	France	United Kingdom
Canal J @ Youtube		France	France
Canal J (catch up)	Canal J (TV)	France	France
Cartoon à la demande		France	United Kingdom
Cartoon Network @ iTunes Store FR	Cartoon Network (TV)	France	United Kingdom
Cartoon Network France @ Youtube	Cartoon Network (TV)	France	United Kingdom
Disney (Version in French) @ XboX		France	United States
Disney Channel @ Dailymotion	Disney Channel (TV)	France	France
Disney Channel @ iTunes Store FR	Disney Channel (TV)	France	France
Disney Channel avant-première	Disney Channel (TV)	France	United Kingdom
Disney Channel FR @ Youtube	Disney Channel (TV)	France	France
Disney Channel France Replay	Disney Channel (TV)	France	France
Disney Cinemagic à la demande (French)	Cinemagic (TV)	France	France
Disney Junior France à la demande	Disney junior (TV)	France	France
Disney XD @ iTunes Store FR	Disney XD (TV)	France	France
Disney XD France @ Youtube	Disney XD (TV)	France	France
Disney XD France à la demande	Disney XD (TV)	France	France
Disneynature (Version in French) @ XboX	Disney Nature (TV)	France	United States
Disneytek		France	France
DHX Junior TV France-Français @ Youtube		Canada	United States
DHX Kids TV France @ Youtube		Canada	United States
DHX Retro TV France @ Youtube		Canada	United States
etoon @ iTunes Store FR		France	France
Funanim		France	France
Game One @ iTunes Store		France	France
Gulli @ iTunes Store FR	Gulli (TV)	France	France
Gulli @ Dailymotion	Gulli (TV)	France	France
Gulli @ Youtube	Gulli (TV)	France	France
Gulli replay	Gulli (TV)	France	France
Kzplay à Dailymotion		France	France
Ludo		France	France
Manga VOD	Mangas (TV)	France	France
Mangas à la demande	Mangas (TV)	France	France
Mattel (Version in French) @ XboX		France	United States
Nickelodeon Junior France (à la demande)	Nick Jnr (TV)	France	United Kingdom
Nickelodeon Junior Replay (France)	Nick Jnr (TV)	France	United Kingdom
Nick Jr. @ iTunes Store FR	Nick Jnr (TV)	France	United Kingdom
NickelodeonJunior (Version in French) @ Xbox	Nick Jnr (TV)	France	United Kingdom
Nickelodeon (France) (à la demande)	Nickelodeon (TV)	France	United Kingdom
Nickelodeon @ iTunes Store FR	Nickelodeon (TV)	France	United Kingdom
Nickelodeon (Version in French) @ XboX	Nickelodeon (TV)	France	United Kingdom
Nickelodeon Replay (Version in French)	Nickelodeon (TV)	France	France
Pass Kids (SFR)		France	France

Piwi+ (à la demande)		France	France
Playhouse Disney @ iTunes Store FR		France	France
TaffyKids		France	France
Télétoon+ à la demande	Télétoon (TV)	France	France
Tiji à la demande	Tiji (TV)	France	France
Tintin TV @ iTunes Store FR		France	France
Wakanim		France	France
Zooloo Kids		France	France

Source: OBS / MAVISE database May 2013 – part of on-going survey

### ***Most popular programmes 2012***

In contrast to earlier research regarding the preferences of the French youth audience, French children (4-14) favour domestic television (as opposed to the youth programmes that were dominated by US products). Other than this, the local productions consist of entertainment and the fourth most popular programme a talent show format. All of the top programmes are broadcast by the private broadcaster TF1 (part of Groupe TF1). All the programmes noted here are primetime viewing and hence is probably carried out in a family context.

## A.13 United Kingdom (GB)

### Channel Distribution 2013

There are a wide range of national television channels available in the UK for children (5 public and 2 private). In addition there is a further one public and three private channels that target very young children (Baby TV, Baby First, Tiny pop and Cbeebies, not included in the tables). The Baby TV channels are distributed on a pan-European basis. No foreign national children's channels are available in the United Kingdom, and in fact the only foreign channel available is the Al Jazeera Children's Channel.

Many of the major pan-European children's channels such as the Disney, Boomerang, Cartoon Network, Nickelodeon, JimJam and Kidsco brands are based and registered in the United Kingdom.

Regarding audience data, the public channel CBBC had the highest share in 2011 just ahead of Disney Channel and Disney Junior. A very wide range of on demand services for children have been identified, most of whom are from the major pan-European networks.

TABLE GB1: NATIONAL AND FOREIGN CHILDREN'S CHANNELS UK			
Channel name	Statute	Country of origin	Distribution
Cartoonito	Private	United Kingdom	Cable/ SAT
CBBC	Public	United Kingdom	Free DTT/ cable / Satellite / IPTV
CITV	Private	United Kingdom	Free DTT/ cable / Satellite / IPTV
Kix	Private	United Kingdom	Cable/ SAT
Pop!	Private	United Kingdom	Cable/ SAT
PopGirl	Private	United Kingdom	Cable/ SAT

Source: OBS / MAVISE database May 2013

TABLE GB2: PAN EUROPEAN CHILDREN'S CHANNELS UK					
Channel name	Country of origin	Digital Terrestrial	Cable	IPTV	Satellite package
Al Jazeera Children's' Channel	Qatar				x
Boomerang Europe	United Kingdom		x	x	x
Cartoon Network Too	United Kingdom		x	x	x
Cartoon Network UK	United Kingdom		x	x	x
Cartoon Network UK HD	United Kingdom				x
Disney Channel	United Kingdom		x	x	x
Disney Channel HD	United Kingdom				x
Disney Cinemagic	United Kingdom		x		x
Disney Cinemagic HD UK	United Kingdom				x
Disney Junior	United Kingdom		x	x	x
Disney XD (UK + Ireland)	United Kingdom		x	x	x
Disney XD UK HD	United Kingdom				x
KidsCo (version in English)	United Kingdom				x
Nick Junior UK	United Kingdom		x	x	x
Nickelodeon HD	United Kingdom				x
Nickelodeon UK	United Kingdom		x	x	x
Nicktoons TV	United Kingdom		x		

Source: OBS / MAVISE database May 2013

<b>TABLE GB3: SAMPLE OF ON DEMAND AUDIOVISUAL SERVICES FOR CHILDREN IN UK 2013</b>			
Name of service	Associated TV channel / or operator	Target Country	Country of establishment
All Day Milkshake!	Channel 5	United Kingdom	United Kingdom
Baby TV @ iTunesStore GB	Baby TV (TV)	United Kingdom	United Kingdom
Baby TV Video Player	Baby TV (TV)	United Kingdom	United Kingdom
Bandai Channel @ XboX		United States (specific European services)	United States
BBC Cbeebies @ Youtube	Cbeebies (TV)	United Kingdom	United Kingdom
Binweevils.com (Nickelodeon / Nick Junior)		United Kingdom	United Kingdom
Boomerang TV Videos	Boomerang (TV)	United Kingdom	United Kingdom
BT Vision Kids		United Kingdom	United Kingdom
Cartoon Network @ iTunes Store GB	Cartoon Network (TV)	United Kingdom	United Kingdom
Cartoon Network UK @ Youtube	Cartoon Network (TV)	United Kingdom	United Kingdom
Cbeebies @ itunes Store GB	Cbeebies (TV)	United Kingdom	United Kingdom
Crunchyroll		United States (specific European services)	United States
Crunchyroll (App @ XboX)		United States (specific European services)	United States
DC Comics @ iTunes Store UK		United Kingdom	United States
DC Comics		United States (specific European services)	United States
DHX Junior TV France-Français @ Youtube		Canada	United States
DHX Kids TV France @ Youtube		Canada	United States
DHX Retro TV France @ Youtube		Canada	United States
Disney @ XboX		United States (specific European services)	United States
Disney Channel @ iTunes Store GB	Disney Channel (TV)	United Kingdom	United Kingdom
Disney Channel Replay	Disney Channel (TV)	United Kingdom	United Kingdom
Disney Channel UK @ Youtube	Disney Channel (TV)	United Kingdom	United Kingdom
Disney Channel Southeast Europe @ Youtube	Disney Channel (TV)	Europe	United Kingdom
Disney Junior (catch-up)	Disney Junior (TV)	United Kingdom	United Kingdom
Disney Junior @ iTunes Store GB	Disney Junior (TV)	United Kingdom	United Kingdom
Disneynature @ XboX		United States (specific European services)	United States
Disney XD @ iTunes Store GB	Disney XD (TV)	United Kingdom	United Kingdom
Disney XD On-Demand Service	Disney XD (TV)	United Kingdom	United Kingdom
Disney XD UK @ Youtube	Disney XD (TV)	United Kingdom	United Kingdom
eOne Family @ iTunes Store GB		United Kingdom	United Kingdom
Hit Entertainment @ iTunes Store GB		United Kingdom	United Kingdom
Jetix Europe @ Youtube	Jetix (TV)	Europe	United Kingdom
JimJam Games	JimJam (TV)	United Kingdom	United Kingdom
Looney Tunes @ iTunes Store GB		United Kingdom	United Kingdom
Mattel @ XboX		United States (specific European services)	United States
Nick Jr. @ iTunes Store GB	Nick Jr (TV)	United Kingdom	United Kingdom
NICK.CO.UK	NICK (TV)	United Kingdom	United Kingdom
Nickelodeon @ iTunes Store GB	Nickelodeon (TV)	United Kingdom	United Kingdom
Nickelodeon @ XboX	Nickelodeon (TV)	United Kingdom	United Kingdom
Nickelodeon & Nick Jr. OD	Nickelodeon (TV)	United Kingdom	United Kingdom
NICKJR.CO.UK	Nick Jr (TV)	United Kingdom	United Kingdom
Official Nick Jr Promo @ Youtube	Nick Jr (TV)	United Kingdom	United Kingdom
Scamp		United Kingdom	United Kingdom

Source: OBS / MAVISE database May 2013 – part of on-going survey

***Most popular programmes 2012***

The United Kingdom audience data shows that the viewing habits of children (4-15) are very similar to those of the youth age group (16-34). Again, talent shows are the most watched with no less than three in the top 5 ranking. There is a balance between the role of public (BBC) and private (ITV) broadcasters regarding the children's audience. All of the programming is British.

## A.14 Greece (GR)

### **Channel Distribution 2013**

Greece has no national children's channel and all other children's channels available in the country are British based US networks and the Al Jazeera Children's Channel. Of these, Nickelodeon is the most popular.

<b>TABLE GR1: PAN EUROPEAN CHILDREN'S CHANNELS IN GREECE</b>					
Channel name	Country of origin	Digital Terrestrial	Cable	IPTV	Satellite package
Al Jazeera Children's' Channel	Qatar				x
Boomerang (version in Greek)	United Kingdom				x
Disney Channel (Greece)	Greece			x	x
Disney Channel Middle East	United Kingdom				x
Disney XD (version in Greek)	United Kingdom				x
JimJam Middle East (Greek)	United Kingdom			x	
KidsCo (version in Greek)	United Kingdom			x	x
Nickelodeon (Greek)	United Kingdom			x	x
Nickelodeon HD	United Kingdom				x

Source: OBS / MAVISE database May 2013

<b>TABLE GR2: SAMPLE ON DEMAND AUDIOVISUAL SERVICES FOR CHILDREN IN GREECE 2013</b>			
Name of service	Associated TV channel / or operator	Target Country	Country of establishment
Disney Channel Greece @ Youtube	Disney Channel (TV)	United Kingdom	United Kingdom
Disney Channel Greece (catch up)	Disney Channel (TV)	Greece	United Kingdom

Source: OBS / MAVISE database May 2013 – part of on-going survey

### **Most popular programmes 2012**

Dedicated children features and entertainment programmes attracted the largest audiences in Greece among children (4 to 14) in 2012. Three out of the five top programmes are national productions. The majority of programmes air at the end of the week or on weekends when both children and parents tend to have more leisure time. All top five children programmes are aired on private networks that include the generalist channels MEGA, which dominates the Greek television market in terms of audience shares, and STAR.

## A.15 Croatia (HR)

### Channel Distribution 2013

Regarding channels, there are three private dedicated children's channels in Croatia. In addition channels from Germany, France, Serbia, Slovenia and the UK are also available. Also the availability of this range of British channels (Pop!, Pop girl! etc.) is not typical.

TABLE HR1: NATIONAL AND FOREIGN CHILDREN'S CHANNELS CROATIA			
Channel name	Statute	Country of origin	Distribution
KIKA	Public	Germany	Cable / IPTV
KIKA HD	Public	Germany	Satellite
Kix	Private	United Kingdom	Cable
MINI TV	Private	Croatia	Cable / Satellite/ IPTV
OK Bambino	Private	Croatia	Pay DTT/ Cable/ IPTV
OK Orlando Kids (Croatia)	Private	Croatia	Pay DTT/ IPTV
Pink Kids	Private	Serbia	Satellite
Pop!	Private	United Kingdom	Cable
PopGirl	Private	United Kingdom	Cable
POP OTO	Private	Slovenia	Satellite
Super RTL	Private	Germany	Cable / IPTV
Super RTL HD	Private	Germany	Satellite
TIJI	Private	France	Cable / IPTV
Tiny Pop	Private	United Kingdom	Cable

Source: OBS / MAVISE database May 2013

TABLE HR2: PAN EUROPEAN CHILDREN'S CHANNELS CROATIA					
Channel name	Country of origin	Pay Digital Terrestrial	Cable	IPTV	Satellite package
Boomerang (Croatian) (1)	United Kingdom	x	x	x	x
Cartoon Network (Croatian) (1)	United Kingdom	x	x	x	x
Disney Channel	United Kingdom		x	x	x
Disney Channel (Croatian) (2)	United Kingdom				x
Disney Junior (3)	United Kingdom		x	x	
Disney XD (Croatian) (4)	United Kingdom		x	x	
Disney XD (Slovenian)	United Kingdom			x	
Disney XD UK HD	United Kingdom				x
JimJam (English)	United Kingdom		x	x	
KidsCo (English)	United Kingdom		x	x	
Nickelodeon UK	United Kingdom		x	x	
Nick Junior UK	United Kingdom			x	
Minimax Hungary (5)	Czech Republic				x
Minimax Romania	Romania				x

Source: OBS / MAVISE database May 2013

(1) Also available in Hungarian, Romanian on satellite

(2) Also available in Czech, English, Hungarian, Romanian on satellite

(3) Also available in Romanian on satellite

(4) Also available in Slovenian on IPTV

(5) Also available Czech on satellite

TABLE HR2: SAMPLE ON DEMAND AUDIOVISUAL SERVICES FOR CHILDREN IN CROATIA 2013			
Name of service	Associated TV channel / or operator	Target Country	Country of establishment
Disney Channel Southeast Europe @ Youtub	Disney Channel (TV)	Croatia	United Kingdom

Source: OBS / MAVISE database May 2013 – part of on-going survey

***Most popular programmes 2012***

In contrast to the popular programmes for young people in Croatia (where four out of five were productions of Croatia or the former Yugoslavia) the Croatian children had higher audiences for US films. Only the private channels feature in the top five broadcasts with RTL having four of the five largest audiences.



## A.16 Hungary (HU)

### Channel Distribution 2013

There are no national children's television channels established in Hungary. But the Megamax channel from the Czech Republic specifically targets the Hungarian audience. In addition the major German channels Super RTL and KIKA are widely distributed. The Pay DTT services provides access to Cartoon Network, Disney Channel and Minimax. According to audience from 2011 the Disney channel was just ahead of Minimax.

TABLE HU1: NATIONAL AND FOREIGN CHILDREN'S CHANNELS HUNGARY			
Channel name	Statute	Country of origin	Distribution
KIKA	Public	Germany	Cable, Satellite, IPTV
KIKA HD	Public	Germany	Satellite
Megamax	Private	Czech Republic	Cable, Satellite, IPTV
Minimax (Hungarian) (1)	Private	Czech Republic	DTT, Cable, IPTV, Satellite
Super RTL	Private	Germany	Cable
Super RTL HD	Private	Germany	Satellite

Source: OBS / MAVISE database May 2013

(1) Czech and Romanian on satellite

TABLE HU2: PAN EUROPEAN CHILDREN'S CHANNELS HUNGARY					
Channel name	Country of origin	Pay Digital Terrestrial	Cable	IPTV	Satellite package
Boomerang (Hungarian) (1)	United Kingdom				x
Cartoon Network (Hungarian) (1)	United Kingdom	x	x	x	x
Disney Channel (Hungarian) (2)	United Kingdom	x	x	x	x
JimJam (Hungarian) (3)	United Kingdom			x	x
KidsCo (Hungarian)	United Kingdom		x	x	x
Nickelodeon (Hungarian) (2) (4)	United Kingdom		x	x	x
Nick Junior UK	United Kingdom		x	x	

Source: OBS / MAVISE database May 2013

(1) Also available in English and Romanian on satellite

(2) Also available in Czech and Romanian on satellite

(3) Also available in English, Czech and Romanian on satellite

(4) Also available in Russian on satellite

TABLE HR2: SAMPLE ON DEMAND AUDIOVISUAL SERVICES FOR CHILDREN IN HUNGARY 2013			
Name of service	Associated TV channel / or operator	Target Country	Country of establishment
JimJam Jatekok (HU)	JimJam (TV)	Hungary	United Kingdom
Megamax On Demand Hungary	Megamax (TV)	Hungary	Czech Republic
Minimax on Demand (Hungary)	Minimax (TV)	Hungary	Czech Republic

Source: OBS / MAVISE database May 2013 – part of on-going survey

### Most popular programmes 2012

In Hungary, as was the case with youth audiences, the five programmes that received the children's audiences in 2012 were all broadcast by private channel RTL. The number one

programme is the Hungarian version of a talent show. Aside from this both local and US animation are popular.

## A.17 Ireland (IE)

### Channel distribution 2012

In recent years, the public service broadcasters have established three national children's channels. TRTE is aimed at older children and youth, while RTEJnr is for smaller children. Both previously had programming blocks but eventually moved to channels on cable, and in the case of RTEJnr became a free DTT channel. The Irish language public channel also did this with the Irish language children's programming block Cúla4, which now had its own cable channel. Aside from this, the availability of channels mirrors that of the UK, with all the national UK channels and all the Pan-European channels that are based in the UK (of which the Nickelodeon channels are the most popular). The only foreign language channel is the Al Jazeera children's channel.

TABLE IE1: NATIONAL AND FOREIGN CHILDREN'S CHANNELS IRELAND			
Channel name	Statute	Country of origin	Distribution
Cartoonito	Private	United Kingdom	Cable/ Satellite
CBBC	Public	United Kingdom	Cable/ Satellite/ IPTV
CITV	Private	United Kingdom	Satellite
Cúla4	Public	Ireland	Cable
Kix	Private	United Kingdom	Satellite
Pop!	Private	United Kingdom	Satellite
PopGirl	Private	United Kingdom	Satellite
RTEjnr	Public	Ireland	Free DTT/ Cable
TRTE	Public	Ireland	Cable

Source: OBS / MAVISE database May 2013

TABLE IE2: PAN EUROPEAN CHILDREN'S CHANNELS IRELAND					
Channel name	Country of origin	Digital Terrestrial	Cable	IPTV	Satellite package
Al Jazeera Children's' Channel	Qatar				x
Boomerang Europe	United Kingdom		x	x	x
Cartoon Network Too	United Kingdom		x	x	x
Cartoon Network UK	United Kingdom		x	x	x
Cartoon Network UK HD	United Kingdom				x
Disney Channel	United Kingdom		x		x
Disney Channel HD	United Kingdom				x
Disney Cinemagic	United Kingdom		x		x
Disney Cinemagic HD UK	United Kingdom		x		x
Disney XD (UK + Ireland)	United Kingdom		x		x
Disney XD UK HD	United Kingdom				x
Disney Junior	United Kingdom		x		x
Nickelodeon Ireland	United Kingdom		x	x	x
Nickelodeon HD	United Kingdom				x
Nicktoons TV Ireland	United Kingdom		x	x	x
Nick Junior Ireland	United Kingdom		x	x	x

Source: OBS / MAVISE database May 2013

<b>TABLE IE3: SAMPLE ON DEMAND AUDIOVISUAL SERVICES FOR CHILDREN IN IRELAND 2013</b>			
Name of service	Associated TV channel / or operator	Target Country	Country of establishment
Bandai Channel @ XboX		United States (specific European services)	United States
Crunchyroll		United States (specific European services)	United States
Crunchyroll (App @ XboX)		United States (specific European services)	United States
Disney @ XboX	Disney Channel (TV)	United States (specific European services)	United States
Disneynature @ XboX	Disney Channel (TV)	United States (specific European services)	United States
JimJam Games	JimJam (TV)	United Kingdom	United Kingdom
Mattel @ XboX		United States (specific European services)	United States
RTE Junior online	RTEjnr (TV)	Ireland	Ireland

Source: OBS / MAVISE database May 2013 – part of on-going survey

### **Most popular programmes 2012**

In Ireland, the most popular broadcasts in 2012 for children included US movies and Irish comedy drama. While the data for youth showed the importance of talent shows, it did not rate in the top five for children. Aside from this, the public broadcaster RTE 1 dominates with all five of the top programmes including home produced drama and film.

## A.18 Iceland (IS)

### **Channel distribution 2012**

Children in Iceland have access to one national private channel available over the free DTT network and cable. With the exception of Cartoon network Europe which is available on DTT, the major European brands are available on IPTV.

<b>TABLE IS1: NATIONAL AND FOREIGN CHILDREN'S CHANNELS ICELAND</b>			
Channel name	Statute	Country of origin	Distribution
Stöð 2 Krakkar	Private	Iceland	Cable

Source: OBS / MAVISE database May 2013

<b>TABLE IS2: PAN EUROPEAN CHILDREN'S CHANNELS IN ICELAND</b>			
Channel name	Statute	Country of origin	Distribution
Boomerang Europe	Private	United Kingdom	IPTV
Cartoon Network Europe	Private	United Kingdom	DTT, IPTV
Cartoon Network Too	Private	United Kingdom	IPTV
Disney Channel	Private	United Kingdom	IPTV
Disney XD (UK + Ireland)	Private	United Kingdom	IPTV
JimJam (version in English)	Private	United Kingdom	IPTV

Source: OBS / MAVISE database May 2013

## A.19 Italy (IT)

### Channel distribution 2012

Italy has a large number of national children's channels, in total eight private and two public channels that are largely available on DTT. Pan-European children's channels available in the country are mainly provided by Italian or British broadcasters. Apart from Cartoon Network (version in Italian), Disney Channel Italia, Disney Junior and Disney Junior Italia which are also available on DTT, all other children's channels are broadcast via satellite or IPTV. In terms of audience shares RAI Yoyo and K2 (Italy) have the highest shares. On demand audiovisual services are offered by both Italian and UK based operators.

TABLE IT1: NATIONAL AND FOREIGN CHILDREN'S CHANNELS ITALY			
Channel name	Statute	Country of origin	Distribution
Boing TV	Private	Italy	DTT, IPTV
Cartoonito (Italy)	Private	Italy	DTT
DeA Junior	Private	Italy	Satellite
DeA Super	Private	Italy	DTT, satellite
DeAKids	Private	Italy	IPTV, satellite
DeAKids +1(1)	Private	Italy	IPTV
Frisbee	Private	Italy	DTT, IPTV, satellite
K2 (Italy)	Private	Italy	DTT, satellite
Planet Kids	Private	Italy	Satellite
RAI Gulp	Public	Italy	DTT, IPTV, satellite
RAI Yoyo	Public	Italy	DTT, IPTV

Source: OBS / MAVISE database May 2013; (1) Time-shifted versions

TABLE IT2: PAN EUROPEAN CHILDREN'S CHANNELS IN ITALY					
Channel name	Country of origin	Digital Terrestrial	Cable	IPTV	Satellite package
Al Jazeera Children's' Channel	Qatar				x
Baraem	Qatar				x
Boomerang (version in Italian)	United Kingdom			x	x
Cartoon Network (Italian)	United Kingdom	x		x	
Disney Channel Italia	Italy	x		x	x
Disney Channel Italia HD	Italy				x
Disney in English	Italy			x	x
Disney Junior	United Kingdom	x			
Disney Junior Italia	Italy	x		x	x
Disney XD (Italy)	Italy			x	x
Disney XD (Italy) HD	Italy				x
JimJam (Italian)	United Kingdom			x	x
Nick Jr. Italia	Italy			x	x
Nickelodeon Italia	Italy			x	x

Source: OBS / MAVISE database January 2013 (not including time-shifted versions)

TABLE IT3: SAMPLE OF ON DEMAND AUDIOVISUAL SERVICES FOR CHILDREN IN ITALY 2013			
Name of service	Associated TV channel / or operator	Target Country	Country of establishment
Boing @ Youtube	Boing (TV)	Italy	Italy
Boing Guarda i Video	Boing (TV)	Italy	Italy
Cartoon Network Italia @ Youtube	Cartoon Network (TV)	Italy	United kingdom
Cartoon Network on-demand (Italy)	Cartoon Network (TV)	Italy	United kingdom

Disney (Version in Italian) @ XboX	Disney Channel (TV)	Italy	United States
Disney Channel Italia @ Youtube	Disney Channel (TV)	Italy	Italy
Disneynature (Version in Italian) @ XboX		Italy	United States
Disney XD Italia @ Youtube	Disney XD (TV)	Italy	Italy
JimJam Giochi (IT)	JimJam (TV)	Italy	United kingdom
Mattel (Version in Italian) @ XboX		Italy	United States
NICKTV.IT Video	Nickelodeon (TV)	Italy	Italy
Nickelodeon Italia @ XboX	Nickelodeon (TV)	Italy	Italy
RAI Gulp (Catch-up)	RAI GULP (TV)	Italy	Italy
RAI Junior @ Youtube	RAI JUNIOR (TV)	Italy	Italy
RAI On Bambini		Italy	Italy
RAI On Bambini (Cubovision)		Italy	Italy

Source: OBS / MAVISE database May 2013 – part of on-going survey

### **Most popular programmes 2012**

In Italy children (4 to 14) enjoy US movies and Italian entertainment shows. Two American movie productions lead the ranking, followed by the Italian adaptation of a talent show and two other Italian productions. The programmes are broadcast on public generalist channel Rai 1 and private generalist channels Canale 5 and Italia 1. The majority of programmes are broadcast at the end of the week and on weekends when both children and parents tend to have more leisure time.

## A.20 Lithuania (LT)

### Channel distribution 2012

There is no national children's channel established in Lithuania. The 4 multimanian channel based in Latvia has a specific Lithuanian version that targets the country. Among others German, French, Nordic, Russian and Polish children's channels are available in the country as well as a range of pan-European channels. Lolo TV, Cartoon Network and Nickelodeon are all available on the Pay DTT network.

TABLE LT1: NATIONAL AND FOREIGN CHILDREN'S CHANNELS LITHUANIA			
Channel name	Statute	Country of origin	Distribution
DR Ramasjang	Public	Denmark	Satellite
Gulli	Mixed	France	Satellite
KIKA	Public	Germany	Satellite
KIKA HD	Public	Germany	Satellite
Lolo TV (Baltic)	Private	Latvia	DTT/ IPTV
Super RTL HD	Private	Germany	Satellite
SVTB	Public	Sweden	Satellite
NRK Super	Public	Norway	Satellite
Polsat JimJam	Private	Poland	Cable
Super RTL	Private	Germany	Cable
Tiji (version in Russian)	Private	France	Cable
Ulibka Rebyonka (Smile TV)	Private	Russian Federation	Cable

Source: OBS / MAVISE database May 2013

TABLE LT2: PAN EUROPEAN CHILDREN'S CHANNELS IN LITHUANIA					
Channel name	Country of origin	Digital Terrestrial	Cable	IPTV	Satellite package
4 Multimanian TV (Lithuanian) (1)	Latvia			x	
Boomerang Europe (2)	United Kingdom		x		
Cartoon Network (Russian)	United Kingdom	x	x	x	x
Cartoon Network Europe (3)	United Kingdom		x	x	
Detskij Mir	Russian Federation		x		
Disney Channel Scandinavia (4)	United Kingdom				x
Disney Junior (4)	United Kingdom				x
Disney XD (UK + Ireland) (4)	United Kingdom				x
JimJam (English) (5)	United Kingdom		x		
Karusel International	Russian Federation		x	x	
KidsCo(English) (1)	United Kingdom				x
Nick Junior (Russian) (6)	United Kingdom				x
Nickelodeon (version in Russian) (4)	United Kingdom	x	x	x	
Nickelodeon UK	United Kingdom	x	x	x	

Source: OBS / MAVISE database May 2013

(1) Also available in Russian on satellite

(2) Also available in Danish, Greek, Norwegian, Swedish on satellite

(3) Also available in Danish, Finnish, Swedish on satellite

(4) Also available in Danish, Finnish, Norwegian, Swedish on satellite

(5) Also available in Arabic, German, Hebrew and Lithuanian on satellite

(6) Also available in Danish, Swedish on satellite



<b>TABLE LT3: SAMPLE OF ON DEMAND AUDIOVISUAL SERVICES FOR CHILDREN IN LITHUANIA 2013</b>			
Name of service	Associated TV channel / or operator	Target Country	Country of establishment
Cartoon Network (version in Russian) (catch-up)	Cartoon Network (TV)	Russian Federation	United Kingdom

Source: OBS / MAVISE database May 2013 – part of on-going survey

### ***Most popular programmes 2012***

Similar to the age group of 12-17 year olds, US movies dominated the top audience shares for children in Lithuania (4 to 14 years). The only exception in the top five programmes is a home produced Lithuanian series. In contrast to that 18-30 year olds show more diverse interests that also include music shows and news programmes. The leadership of TV3 (Swedish group MTG) in terms of national audience market shares is reflected in the viewing patterns among children and young people alike – in both cases all top five programmes are broadcast by the private entertainment channel. All programmes are watched during evening peak time and predominantly on weekends when both children and parents tend to have more spare time.

## A.21 Luxembourg (LU)

### Channel distribution 2012

The Luxembourg market is served by the children's channels of neighbouring countries France, Germany, Italy and the UK. All the major pan-European channels are available in French, English and German.

Channel name	Statute	Country of origin	Distribution
Canal J	Private	France	Cable/ IPTV
Ceebies	Public	United Kingdom	Satellite
Gulli	Mixed	France	Cable/ IPTV
Junior	Private	Germany	Cable/ IPTV
KIKA	Public	Germany	Cable/ IPTV
KIKA HD	Public	Germany	Satellite
Mangas	Private	France	Cable/ IPTV
RAI Gulp	Public	Italy	Satellite
Super RTL	Private	Germany	Cable/ IPTV
Tiji	Private	France	Cable/ IPTV

Source: OBS / MAVISE database May 2013

Channel name	Country of origin	Digital Terrestrial	Cable	IPTV	Satellite package
Boomerang Europe (1)	United Kingdom		x	x	
Boomerang (French)	United Kingdom		x	x	
Boomerang (German)	United Kingdom		x		
Cartoon Network Europe	United Kingdom		x	x	
Cartoon Network (Germany)	United Kingdom		x		
Cartoon Network (French)	United Kingdom		x	x	
Disney Channel France	United Kingdom		x		
Disney Channel Germany	United Kingdom		x	x	
Disney Channel Germany HD	United Kingdom				x
Disney Cinemagic (German)	United Kingdom		x	x	
Disney Junior France	United Kingdom		x		
Disney Junior (Germany)	United Kingdom		x	x	
Disney XD France	United Kingdom		x		
Disney XD (Germany)	United Kingdom		x	x	
KidsCo (English)	United Kingdom		x	x	
KidsCo (French)	United Kingdom		x		
KidsCo (German)	United Kingdom		x		
KidsCo (Portuguese)	United Kingdom		x	x	
Kidsco (n Spanish)	United Kingdom		x		
Nickelodeon (Germany)	United Kingdom			x	
Nickelodeon (France)	United Kingdom		x		
Nickelodeon Junior (France)	United Kingdom		x		
NICK Junior (Germany)	United Kingdom		x	x	
Nick Junior UK	United Kingdom		x	x	

Source: OBS / MAVISE database May 2013

## A.22 Latvia (LV)

### Channel distribution 2012

Latvia has one national children's channel - 4 multimanía - which is available on national cable television. Other foreign children's channels are from French, German, Russian and Nordic broadcasters. Pan-European children's channels are mostly from UK-based broadcasting companies and available via satellite. A total of 10 channels (including Russian versions) are available on Pay DTT.

TABLE LV1: NATIONAL AND FOREIGN CHILDREN'S CHANNELS IN LATVIA			
Channel name	Statute	Country of origin	Distribution
DR Ramasjang	Public	Denmark	Satellite
Gulli (Russia)	Private	France	IPTV
Lolo TV (Baltic)	Private	Latvia	Cable, IPTV
NRK Super	Public	Norway	Satellite
Super RTL	Private	Germany	Satellite
Tiji (Russian)	Private	France	Cable, IPTV
Ulibka Rebyonka (Smile TV)	Private	Russia	Cable

Source: OBS / MAVISE database May 2013

TABLE LV2: PAN EUROPEAN CHILDREN'S CHANNELS IN LATVIA					
Channel name	Country of origin	Digital Terrestrial	Cable	IPTV	Satellite package
4 multimanía (Russian)	Latvia		x		
Boomerang Europe (1)	United Kingdom	x	x	x	
Cartoon Network (Russian)	United Kingdom	x	x	x	x
Cartoon Network Europe (2)	United Kingdom	x		x	
Detskij Mir	Germany			x	
Disney Channel (3)	United Kingdom	x		x	
Disney Channel (Swedish)	United Kingdom	x		x	x
Disney Junior (3)	United Kingdom	x		x	
Disney Junior (Swedish)	United Kingdom			x	x
Disney XD (UK + Ireland) (3)	United Kingdom	x		x	x
Disney XD UK HD	United Kingdom				x
Disney XD (Swedish)	United Kingdom			x	x
JimJam (English)	United Kingdom	x	x	x	
JimJam (Russian)	United Kingdom	x	x	x	
Karusel International	Russian Federation		x	x	
Nick Junior (Russian) (4)	United Kingdom				x
Nickelodeon Russian (5)	United Kingdom	x	x	x	
Nickelodeon UK	United Kingdom	x	x	x	
Nickelodeon HD	United Kingdom		x	x	

Source: OBS / MAVISE database May 2013

(1) Also available in Danish, Norwegian, Swedish on satellite

(2) Also available in Danish, Finnish, Swedish on satellite

(3) Also available in Danish, Finnish, Norwegian on satellite

(4) Also available in Danish and Swedish on satellite

(5) Also available in Danish, Finnish, Hungarian, Norwegian on satellite

<b>TABLE LV3: SAMPLE OF ON DEMAND AUDIOVISUAL SERVICES FOR CHILDREN IN LATVIA 2013</b>			
Name of service	Associated TV channel / or operator	Target Country	Country of establishment
Cartoon Network (Russian) (catch-up)	Cartoon Network	Russian Federation	United Kingdom

*Source: OBS / MAVISE database May 2013 – part of on-going survey*

### ***Most popular programmes 2012***

The most viewed programmes for Latvian children (4 to 14) in 2012 included US entertainment content in the form of blockbuster movies. The only exception in the top five programmes is a home produced Latvian TV series. This contrasts with the preferences of Latvia's youth (aged 12 to 17 and 18 to 30) who preferred domestic produced programmes. The dominance of TV3 in terms of national audience market shares is also reflected in the viewing patterns of Latvian children – all programmes are broadcast on the private entertainment channel that belongs to the Modern Times Group. The programmes are aired during peak evening time predominantly on weekends when children and parents tend to have more leisure time.

## A.23 Montenegro (ME)

### **Channel distribution 2012**

There are no national children's channels in Montenegro but the channels from Serbia, Croatia, Italy, Germany and Slovenia are distributed here. In addition English and Croatian versions of pan-European channels are available on cable and IPTV.

<b>TABLE ME1: NATIONAL AND FOREIGN CHILDREN'S CHANNELS IN MONTENEGRO</b>			
Channel name	Statute	Country of origin	Distribution
Kanal D (Serbia)	Private	Serbia	Cable
KIKA HD	Public	Germany	Satellite
Mini Ultra	Private	Serbia	Satellite
Mini TV	Private	Croatia	Satellite
OK Bambino	Private	Croatia	IPTV
OK Orlando Kids (Croatia)	Private	Croatia	IPTV
Pink Kids	Private	Serbia	Satellite
POP OTO	Private	Slovenia	Satellite
RAI GULP	Public	Italy	Satellite
Super RTL	Private	Germany	Cable / satellite

Source: OBS / MAVISE database May 2013

<b>TABLE ME2: PAN EUROPEAN CHILDREN'S CHANNELS IN MONTENEGRO</b>					
Channel name	Country of origin	Digital Terrestrial	Cable	IPTV	Satellite package
Boomerang Europe	United Kingdom		x	x	
Boomerang (version in Croatian)	United Kingdom			x	
Cartoon Network Europe	United Kingdom		x	x	
Boomerang (version in Croatian)	United Kingdom			x	
Disney Channel					x
Disney Junior	United Kingdom			x	
Disney XD (version in Croatian)	United Kingdom			x	
Minimax	Czech republic		x		x

Source: OBS / MAVISE database May 2013

## A.24 The “former Yugoslav Republic of Macedonia” (MK)

### *Channel distribution 2012*

While there are no national children’s channels established in the “Former Yugoslav Republic of Macedonia”, channels from Serbia, Albania, Croatia, Slovenia and the Czech Republic are available. Of course the major pan-European channels are also available in English or Croatian. Three English channels Boomerang, Cartoon Network and Kidsco are on the Pay DTT network.

<b>TABLE MK1: NATIONAL AND FOREIGN CHILDREN’S CHANNELS FORMER YUGOSLAV REPUBLIC OF MACEDONIA</b>			
Channel name	Statute	Country of origin	Distribution
Kanal D (Serbia)	Private	Serbia	cable
Minimax	Private	Czech Republic	IPTV
MINI TV	Private	Croatia	Satellite
MINI Ultra	Private	Serbia	Satellite
OK Orlando Kids (Croatia)	Private	Croatia	cable/ IPTV
Pink Kids	Private	Serbia	Satellite
RAI Gulp	Public	Italy	Satellite
Super RTL	Private	Germany	Satellite
Tring Tring	Private	Albania	cable/ IPTV

Source: OBS / MAVISE database May 2013

<b>TABLE MK2: PAN EUROPEAN CHILDREN’S CHANNELS FORMER YUGOSLAV REPUBLIC OF MACEDONIA</b>					
Channel name	Country of origin	Pay Digital Terrestrial	Cable	IPTV	Satellite package
Boomerang Europe	United Kingdom	x	x	x	
Cartoon Network Europe	United Kingdom	x	x	x	
Cartoon Network (version in Bulgarian)	United Kingdom				x
KidsCo (version in English)	United Kingdom	x			
Disney channel	United Kingdom				x
Disney XD (Croatian)	United Kingdom		x		
JimJam (Croatian)	United Kingdom		x		
JimJam (Bulgarian)	United Kingdom		x		
Nickelodeon UK	United Kingdom			x	

Source: OBS / MAVISE database May 2013

### *Most popular programmes 2012*

Children (as was the case with teenagers) in the “Former Yugoslav Republic of Macedonia” enjoy watching Turkish soap operas and reality shows. These account for three out of five of the top programmes. Another popular show is a reality show. A news broadcast also features in the top five programmes and all programmes are broadcast by private broadcaster Sitel TV.

## A.25 Malta (MT)

### *Channel distribution 2012*

While there are no national children's channels established in Malta channels from Italy and the UK are available. Six English language children's channels are on the Pay DTT network.

<b>TABLE MT1: NATIONAL AND FOREIGN CHILDREN'S CHANNELS IN MALTA 2012/2013</b>			
Channel name	Statute	Country of origin	Distribution
Boing TV	Private	Italy	Cable/ IPTV
Cartoonito	Private	United Kingdom	Pay DTT/ Cable/ IPTV
Cartoon Network Too	Private	United Kingdom	Cable / IPTV

Source: OBS / MAVISE database May 2013

<b>TABLE MT1: PAN EUROPEAN CHILDREN'S CHANNELS IN MALTA 2012/2013</b>					
Channel name	Country of origin	Pay Digital Terrestrial	Cable	IPTV	Satellite package
Boomerang Europe	United Kingdom	x	x	x	
Cartoon Network Europe	United Kingdom	x	x	x	
Disney Channel	United Kingdom	x	x	x	
Disney Junior	United Kingdom		x	x	
Disney XD (UK + Ireland)	United Kingdom		x	x	
Disney XD UK HD	United Kingdom				x
JimJam (Italian)	United Kingdom	x			
JimJam Middle East (English)	United Kingdom		x	x	
KidsCo (version in English)	United Kingdom		x	x	
Nickelodeon UK	United Kingdom	x			
Nickelodeon HD Europe	United Kingdom				x
Nick Junior UK	United Kingdom	x	x	x	

Source: OBS / MAVISE database May 2013

### *Audience data*

The Maltese Broadcasting Authority provides reports on surveys regarding television viewing<sup>26</sup>. In addition, the annual reports<sup>27</sup> provide an overview of the most popular channels. However, they only do this for children aged 12-14. In 2011, The most followed station of 12-14 year olds was TVM, attaining its highest audiences for this group at prime time after the main news bulletin, while the Disney Channel was the second most followed channel for this group followed by Discovery Channel and Italia 1.

<sup>26</sup> Survey of audience viewing July to September 2012, Malta Broadcasting Authority, available here: <http://www.bamalta.org/prdetails?id=236>

<sup>27</sup> Malta Broadcasting Authority Annual Report 2011, available here [http://www.ba-malta.org/annual-report\\_2011](http://www.ba-malta.org/annual-report_2011)

## A.26 Netherlands (NL)

### Channel distribution 2012

The Netherlands has three dedicated national children channels, two private and one public. Other foreign children's channels available in the country are from Germany, Belgium and Luxembourg, including the RTL telekids that specifically targets the Netherlands. Pan-European children's channels are predominantly based in the UK and the Netherlands and distributed on cable, IPTV and satellite packages. Three of the Pan-European children's channels are also available on Pay DTT. In terms of audience data private pan-European channels Nickelodeon Netherlands, Disney XD and Disney Channel lead before national children's channel Kindernet.

TABLE NL1: NATIONAL AND FOREIGN CHILDREN'S CHANNELS THE NETHERLANDS			
Channel name	Statute	Country of origin	Distribution
Cartoonito	Private	United Kingdom	Cable
Kindernet	Private	The Netherlands	DTT, cable, IPTV, satellite
KIKA	Public	Germany	Satellite
KIKA HD	Public	Germany	Satellite
NICK (Austria)	Private	Germany	Satellite
Pebble TV	Private	The Netherlands	Cable, IPTV
RTL Telekids	Private	Luxembourg	Cable
Super RTL	Private	Germany	Satellite
Super RTL HD	Private	Germany	Satellite
VRT Ketnet	Public	Belgium-Flemish Community	Satellite
Z@pp 24	Public	The Netherlands	Cable, IPTV, satellite

Source: OBS / MAVISE database May 2013

TABLE NL2: PAN EUROPEAN CHILDREN'S CHANNELS IN THE NETHERLANDS					
Channel name	Country of origin	Digital Terrestrial	Cable	IPTV	Satellite package
Al Jazeera Children's' Channel	Qatar		x		
Boomerang (version in Dutch)	United Kingdom		x	x	
Boomerang (version in Greek)	United Kingdom				x
Boomerang Europe	United Kingdom				x
Cartoon Network (Dutch)	United Kingdom		x	x	x
CBBC	United Kingdom		x	x	
Cbeebies	United Kingdom		x		
Disney Channel Nederland	The Netherlands		x		x
Disney Junior	United Kingdom		x		
Disney Junior Nederland	The Netherlands		x		
Disney XD (version in Dutch)	The Netherlands	x	x	x	x
Disney XD HD (version in Dutch)	The Netherlands				
JimJam (Version in Dutch)	United Kingdom		x	x	x
JimJam Middle East (English)	United Kingdom				x
KidsCo (version in English) (1)	United Kingdom				x
Nat Geo Junior (Version in Dutch)	United Kingdom	x			
Nick Hits	The Netherlands		x		
Nick Jr. (Netherlands)	The Netherlands		x	x	
Nickelodeon (Germany)	Germany				x
Nickelodeon (Dutch)	The Netherlands	x	x	x	x
NickToons (Netherlands)	The Netherlands		x	x	

Source: OBS / MAVISE database May 2013



(1) Also available in French, German and Spanish on satellite

<b>TABLE NL3: SAMPLE OF ON DEMAND AUDIOVISUAL SERVICES FOR CHILDREN IN THE NETHERLANDS 2013</b>			
Name of service	Associated TV channel / or operator	Target Country	Country of establishment
Disney Channel (NL) (Catch-up)	Disney Channel (TV)	Netherlands	United Kingdom
Disney (Version in Dutch) @ XboX	Disney Channel (TV)	Netherlands	United States
Disneynature @ XboX		United States (specific European services)	United States
JimJam Spellen (NL)	Jimjam (TV)	Netherlands	United Kingdom
Mattel @ XboX		United States (specific European services)	United States
Nickelodeon (catch-up) (Version in Dutch)	Nickelodeon (TV)	Netherlands	Netherlands
Official Disney XD (NL) @ Youtube	Disney XD (TV)	Netherlands	United Kingdom

Source: OBS / MAVISE database May 2013 – part of on-going survey

### **Most popular programmes 2012**

Dutch children aged (3-12) are particularly interested in home produced entertainment content on private television, particularly talent shows. These viewing preferences are similar to the youth age groups (13 - 19 and 20-34 years) who also favour music and talent casting shows. The only exception to the predominance of games and casting shows is a newscast that comes in second place. All of these programmes are watched during peak evening times at the end of the week or weekends when children and parents tend to have more time. Private generalist channel RTL4, which is part of the RTL group, provides all of the top five programmes. All programmes included in the lead table are Dutch productions which reflects the capacities of a country with a strong TV production infrastructure in the entertainment sector.

## A.24 Poland (PL)

### Channel distribution 2012

Poland has three private children's channels (Mini Mini, Zigzap, Polsat JimJam) that are available on cable, IPTV and satellite. Other foreign children's channels available in the country are from French, German, Italian, Polish, Russian or British private broadcasters. The Al Jazeera children's channel is also available on satellite. None of the channels are available on DTT. In terms of audience data, the Disney Channel Polska leads before Cartoon Network (Poland), Disney XD, Mini Mini and Nickelodeon Poland.

TABLE PL1: NATIONAL AND FOREIGN CHILDREN'S CHANNELS POLAND			
Channel name	Statute	Country of origin	Distribution
Cbeebies (Poland)	Private	United Kingdom	Cable/ IPTV
Mini Mini+ HD	Private	Poland	Cable
Mini Mini	Private	Poland	Cable/ Satellite/ IPTV
Polsat JimJam	Private	Poland	Cable/ Satellite/ IPTV
RAI Gulp	Private	Italy	Satellite
RIC TV	Private	Germany	Satellite
Super RTL	Private	Germany	IPTV
Super RTL HD	Private	Germany	Satellite
Télétoon	Private	France	Cable
Ulibka Rebyonka (Smile TV)	Private	Russian Federation	Satellite
Zigzap	Private	Poland	Cable/ IPTV

Source: OBS / MAVISE database May 2013

TABLE PL2: PAN EUROPEAN CHILDREN'S CHANNELS IN POLAND					
Channel name	Country of origin	Digital Terrestrial	Cable	IPTV	Satellite package
Al Jazeera Children's Channel	Qatar				x
Boomerang (Polish) (1)	United Kingdom		x	x	x
Cartoon Network (Poland) (2)	United Kingdom		x	x	x
Disney Channel Polska (3)	United Kingdom		x	x	x
Disney Junior (Poland)	United Kingdom		x	x	x
Disney XD (Polish)	United Kingdom		x	x	x
JimJam (Polish) (4)	United Kingdom		x	x	x
KidsCo (Polish) (3)	United Kingdom		x		x
Nickelodeon Poland (5)	United Kingdom		x	x	x
Nickelodeon Poland HD (3) (6)	United Kingdom			x	x
Nick Junior (Polish) (3)	United Kingdom			x	x

Source: OBS / MAVISE database May 2013

(1) Also available in English and in Hungarian

(2) Also available in English, in Hungarian and in Romanian

(3) Also available in English

(4) Also available in Czech and in Hungarian

(5) Also available in English, in Hungarian, in Portuguese and in Russian

(6) Also available in Russian

TABLE PL3: SAMPLE OF ON DEMAND AUDIOVISUAL SERVICES FOR CHILDREN IN POLAND 2013			
Name of service	Associated TV channel / or operator	Target Country	Country of establishment
Boomerang Poland @ Youtube	Boomerang (TV)	Poland	United Kingdom

Disney Channel (PL) (catch-up)	Disney Channel (TV)	Poland	United Kingdom
Disney Channel PL @ Youtube	Disney Channel (TV)	Poland	United Kingdom
Disney XD Polska @ Youtube	Disney XD (TV)	Poland	United Kingdom
JimJam Gry (PL)	JimJam (TV)	Poland	United Kingdom
Miniminiplus Filmmiki	Mini Mini (TV)	Poland	Poland
Nickelodeon Wideo	Nickelodeon (TV)	Poland	Poland
Teletoon+ Wideo	TeleToon+ (TV)	Poland	Poland

Source: OBS / MAVISE database May 2013 – part of on-going survey

### **Most popular programmes 2012**

The private broadcaster Polsat successfully targets the Polish children (4 to 15) with four of the five top programmes. The most watched were US films and a British-US co-production. The only European production is a French film. This contrasts with the viewing patterns of the Polish youth audience which favoured Polish produced programming provided by the public broadcaster TVP1. The most popular movie in the top five children programmes ranking is aired on TVP1. All programmes are broadcast during peak evening time on Fridays when children and parents tend to have more leisure time.

## A.29 Portugal (PT)

### *Channel distribution 2012*

Portugal has three national children's television channels all of which are privately owned. French and German channels are also available, and of course the Portuguese versions of the major pan-European children's channels. Regarding audience data in 2011, the national channel Panda Biggs was more popular than the Disney Channel.

TABLE PT1: NATIONAL AND FOREIGN CHILDREN'S CHANNELS PORTUGAL			
Channel name	Statute	Country of origin	Distribution
Canal Panda	Private	Portugal	Cable/ Satellite/ IPTV
Panda Biggs TV	Private	Portugal	Cable/ Satellite/ IPTV
SIC K	Private	Portugal	Cable/ Satellite/ IPTV
Super RTL	Private	Germany	Cable/ IPTV
Tiji	Private	France	IPTV

Source: OBS / MAVISE database May 2013

TABLE PT2: PAN EUROPEAN CHILDREN'S CHANNELS PORTUGAL					
Channel name	Country of origin	Digital Terrestrial	Cable	IPTV	Satellite package
Boomerang Europe	United Kingdom		x	x	x
Cartoon Network Europe	United Kingdom		x	x	x
Disney Channel Portugal	United Kingdom		x	x	x
Disney Cinemagic (Portugal)	United Kingdom			x	
Disney Cinemagic HD (Portuguese)	United Kingdom			x	
Disney Junior	United Kingdom		x		
JimJam (Portuguese)	United Kingdom		x	x	x
KidsCo (Portuguese)	United Kingdom		x	x	
Nickelodeon (Portuguese)	United Kingdom		x		x

Source: OBS / MAVISE database May 2013

TABLE PT3: SAMPLE OF ON DEMAND AUDIOVISUAL SERVICES FOR CHILDREN IN PORTUGAL 2013			
Name of service	Associated TV channel / or operator	Target Country	Country of establishment
Canal Panda Portugal Video	Canal Panda (TV)	Portugal	Portugal
Disney Movies on Demand		Portugal	Portugal
Zon Kids ilimitado		Portugal	Portugal
JimJam Jogos (PT)	JimJam (TV)	Portugal	United Kingdom

Source: OBS / MAVISE database May 2013 – part of on-going survey

### *Most popular programmes 2012*

In Portugal news broadcasts remain very important for children (as was the case for young people). This may reflect a family tradition of watching the news together. The other genres are talent show and TV fiction. Private channels are more dominant as regards capturing the child audience. All of the programmes are of national origin (except one Brazilian drama series).

## A.30 Republic of Serbia (RS)

### Channel distribution 2012

There are five national private television channels for children in Serbia, and also a Serbian version of Minimax that is established in the Czech Republic. The major pan-European channels are also available alongside Croatian, Italian and German channels.

TABLE RS1: NATIONAL AND FOREIGN CHILDREN'S CHANNELS SERBIA			
Channel name	Statute	Country of origin	Distribution
FEELMAX JUNIOR	Private	Serbia	IPTV
Happy K	Private	Serbia	Cable/ Satellite/ IPTV
Kanal D (Serbia)	Private	Serbia	IPTV
KIKA HD	Public	Germany	Satellite
Mini Ultra	Private	Serbia	Cable
Minimax (Serbia) (1)	Private	Czech Republic	Cable/ Satellite/ IPTV
MINI TV	Private	Croatia	Satellite
Pink Kids	Private	Serbia	Cable/ Satellite/ IPTV
Rai Gulp	Public	Italy	Satellite

Source: OBS / MAVISE database May 2013

(1) Also available in Hungarian, Romanian on satellite

TABLE RS2: PAN EUROPEAN CHILDREN'S CHANNELS SERBIA					
Channel name	Country of origin	Digital Terrestrial	Cable	IPTV	Satellite package
Boomerang Europe (1)	United Kingdom		x	x	x
Cartoon Network (1)	United Kingdom		x	x	x
Disney Channel (1)	United Kingdom		x	x	x
Disney Junior (1)	United Kingdom			x	x
Disney XD (Serbia)	United Kingdom			x	x
JimJam	United Kingdom				x
KidsCo	United Kingdom		x		
Nickelodeon (2)	United Kingdom		x		
Nickelodeon HD	United Kingdom		x		

Source: OBS / MAVISE database May 2013

(1) Also available in Hungarian, Romanian on satellite

(2) Also available in German via satellite

### Most popular programmes 2012

The data for Serbia shows that Serbian children watch mostly domestic programming both drama and movies, and the channel with the most watched programmes in 2012 was RTS1, the public service broadcaster.

## A.31 Romania (RO)

### **Channel distribution 2012**

There are two private children's channels in Romania, and the German Super RTL is also widely distributed. A wide range of pan-European channels are available on cable IPTV and satellite. Audience data from 2011 showed Disney channel to be the most popular followed by cartoon Network and Minimax.

<b>TABLE RO1: NATIONAL AND FOREIGN CHILDREN'S CHANNELS ROMANIA</b>			
Channel name	Statute	Country of origin	Distribution
Boom Smarty	Private	Romania	IPTV
Megamax Romania	Private	Romania	IPTV
Super RTL	Private	Germany	Cable/ IPTV
Super RTL HD	Private	Germany	Satellite

Source: OBS / MAVISE database May 2013

<b>TABLE RO2: PAN EUROPEAN CHILDREN'S CHANNELS ROMANIA</b>					
Channel name	Country of origin	Digital Terrestrial	Cable	IPTV	Satellite package
Boomerang (Romanian) (1)	United Kingdom		x	x	x
Cartoon Network (Romanian) (2)	United Kingdom		x	x	x
Disney Channel (Romanian) (3)	United Kingdom		x	x	x
Disney Junior (Romania) (5)	United Kingdom			x	x
JimJam (Romanian) (4)	United Kingdom		x	x	
Minimax (Romanian) (2)	Czech Republic		x	x	x
KidsCo (Romanian)	United Kingdom		x	x	
Nickelodeon (Romanian) (4)	United Kingdom		x	x	x
Nick Junior UK	United Kingdom				x

Source: OBS / MAVISE database May 2013

(1) Also available in English, Greek, Hungarian, Polish on satellite

(2) Also available in Hungarian on satellite

(3) Also available in Czech, Hungarian on satellite

(4) Also available in English on satellite

(5) Also available in Bulgarian on satellite

<b>TABLE RO3: SAMPLE OF ON DEMAND AUDIOVISUAL SERVICES FOR CHILDREN IN ROMANIA 2013</b>			
Name of service	Associated TV channel / or operator	Target Country	Country of establishment
Disney Channel RO @ Youtube	Disney Channel (TV)	Romania	United Kingdom
JimJam Jocuri (RO)	JimJam (TV)	Romania	United Kingdom

Source: OBS / MAVISE database May 2013 – part of on-going survey

### **Most popular programmes 2012**

Private broadcasters Pro TV (Central European Media Enterprises) dominates the ranking of top five programmes viewed by children in Romania with talent show formats featuring strongly (similar to the findings for youth audiences). For both groups there are also two news broadcasts in the top five. All the content is produced in Romania.

## A.32 Sweden (SE)

### Channel distribution 2012

Sweden has one public (SVTB) and one private (C MORE Kids) children's channel and Finnish and Danish channels are also distributed. Pan-European children's channels are provided by private British broadcasters. In terms of audience the national public service children's channel SVTB had a very high audience share in 2011.

TABLE SE1: NATIONAL AND FOREIGN CHILDREN'S CHANNELS IN SWEDEN			
Channel name	Statute	Country of origin	Distribution
C MORE Kids (Sweden)	Private	Sweden	Cable/ Satellite
DR Ramasjang	Public	Denmark	Satellite
MTV3 Juniori	Private	Finland	Satellite
SVTB	Public	Sweden	DTT, cable, IPTV

Source: OBS / MAVISE database May 2013

TABLE SE2: PAN EUROPEAN CHILDREN'S CHANNELS IN SWEDEN					
Channel name	Country of origin	Pay Digital Terrestrial	Cable	IPTV	Satellite package
Boomerang (Swedish)	United Kingdom		x	x	x
Cartoon Network (Swedish)	United Kingdom	x	x	x	x
Disney Channel Scandinavia (Swedish)	United Kingdom	x	x	x	x
Disney Junior (Swedish)	United Kingdom		x	x	x
Disney XD (Swedish)	United Kingdom	x	x	x	x
Nickelodeon (Swedish) (1)	United Kingdom	x	x	x	x
Nick Junior (Swedish) (2)	United Kingdom		x	x	x

Source: OBS / MAVISE database May 2013

(1) Also available in Danish, Finnish, Norwegian on satellite

(2) Also available in Danish and Russian on satellite

TABLE SE3: SAMPLE OF ON DEMAND AUDIOVISUAL SERVICES FOR CHILDREN IN SWEDEN 2013			
Name of service	Associated TV channel / or operator	Target Country	Country of establishment
Bandai Channel @ XboX		United States (specific European services)	United States
Boomerang catch up (version in Swedish)	Boomerang (TV)	Sweden	United Kingdom
Cartoon Network catch up (version in Swedish)	Cartoon Network (TV)	Sweden	United Kingdom
Disney (Version in Swedish) @ XboX	Disney Channel (TV)	Sweden	United States
Disney Channel catch up (version in Swedish)	Disney Channel (TV)	Sweden	United Kingdom
Disney Junior catch up (version in Swedish)	Disney Junior (TV)	Sweden	United Kingdom
Disney XD catch up (version in Swedish)	Disney XD (TV)	Sweden	United Kingdom
Disney XD Sweden @ Youtube	Disney XD (TV)	Sweden	United Kingdom
Lattjo Lajban catch up	TV4 (Sweden) (TV)	Sweden	Sweden
Mattel @ XboX		United States (specific European services)	United States
Nickelodeon catch up (version in Swedish)	Nickelodeon (TV)	Sweden	Netherlands
SVTB catch up	SVTB (TV)	Sweden	Sweden

*Source: OBS / MAVISE database May 2013 – part of on-going survey*

### ***Most popular programmes 2012***

The most popular programmes for children in Sweden (3 to 14) in 2012 were home produced entertainment content, among which talent show formats resonated particularly strong (as was the case among young people aged 12-34). All of the top five programmes are national or European entertainment music or games shows. Public broadcasting succeeded in attracting children audiences in Sweden - all programmes are broadcast either on public channel SVT1, the most watched channel in Sweden overall, or on public children's channel SVTB. With one exception all programmes are aired during evening peak times at the end of the week or on weekends when children and parents tend to have more spare time.



## A.33 Slovenia (SI)

### Channel distribution 2012

There is one national children's television channel Pop OTO, part of the selection of pay TV channels from Pop TV. Aside from this a range of Croatian, French, German and Italian channels are available, with also the usual pan-European channels, Minimax, and the Russian Karusel International. As regards audience data, Disney channel reaches the highest audience followed by Cartoon Network and Boomerang.

TABLE S11: NATIONAL AND FOREIGN CHILDREN'S CHANNELS SLOVENIA			
Channel name	Statute	Country of origin	Distribution
KIKA	Public	Germany	cable/ IPTV
KIKA HD	Public	Germany	Satellite
Mangas	Private	France	IPTV
Minimax	Private	Czech Republic	Cable, IPTV, Satellite
MINI TV	Private	Croatia	Satellite
POP OTO	Private	Slovenia	Cable, Satellite, IPTV
Rai Gulp	Public	Italy	Satellite
Super RTL	Private	Germany	Cable, IPTV, Satellite
Super RTL HD	Private	Germany	Satellite
Tiji	Private	France	Cable, IPTV

Source: OBS / MAVISE database May 2013

TABLE S12: PAN EUROPEAN CHILDREN'S CHANNELS SLOVENIA					
Channel name	Country of origin	Digital Terrestrial	Cable	IPTV	Satellite package
Boomerang (Slovenian) (1)	United Kingdom		x	x	
Cartoon Network (Slovenian) (1)	United Kingdom		x	x	
Disney Channel (Slovenian)	United Kingdom		x	x	x
Disney Channel Germany	Germany				x
Disney Channel Germany HD	Germany				x
Disney Junior	United Kingdom			x	
Disney Junior (Germany)	United Kingdom			x	
Disney XD (Slovenian) (1)	United Kingdom		x	x	
JimJam (Slovenian)	United Kingdom		x	x	
KidsCo (Slovenian)	United Kingdom		x	x	
Nickelodeon UK	United Kingdom		x	x	
Karusel International	Russia			x	

Source: OBS / MAVISE database May 2013

(1) Also available in English on satellite

TABLE SE3: SAMPLE OF ON DEMAND AUDIOVISUAL SERVICES FOR CHILDREN IN SLOVENIA 2013			
Name of service	Associated TV channel / or operator	Target Country	Country of establishment
AMIS Video Zabavnik		Slovenia	Slovenia

Source: OBS / MAVISE database May 2013 – part of on-going survey

***Most popular programmes 2012***

The Slovenian top programmes in 2012 for children showed a balance between public and private broadcasters (in contrast to the data for young audiences where private broadcasting dominated). Talent show formats and US movies featured particularly strong.

## A.34 Slovakia (SK)

### Channel distribution 2012

In the Slovak Republic, the pan-European channel for babies, Duck TV is licensed and established. It does not feature specifically in the analysis in this report as it is aimed at very small children. Other national channels available here are those from the Czech Republic and Germany.

TABLE SK1: NATIONAL AND FOREIGN CHILDREN'S CHANNELS SLOVAK REPUBLIC			
Channel name	Statute	Country of origin	Distribution
CS Mini	Private	Czech Republic	Satellite
Duck TV	Private	Slovak Republic	Cable / Satellite/ IPTV
Duck TV HD	Private	Slovak Republic	Cable
KIKA	Public	Germany	Cable / IPTV
KIKA HD	Public	Germany	Satellite
Minimax (1)	Private	Czech Republic	Cable / Satellite/ IPTV
Megamax	Private	Czech Republic	Satellite
Super RTL	Private	Germany	Cable / IPTV
Super RTL HD	Private	Germany	Satellite

Source: OBS / MAVISE database May 2013

(1) Also available in Hungarian and Romanian on satellite

TABLE SK2: PAN EUROPEAN CHILDREN'S CHANNELS SLOVAK REPUBLIC					
Channel name	Country of origin	Digital Terrestrial	Cable	IPTV	Satellite package
Boomerang Europe (2)	United Kingdom				x
Cartoon Network Europe (1)	United Kingdom				
Disney Channel (Slovak)	United Kingdom		x	x	x
Disney Channel (1)	United Kingdom				x
Disney Junior (3)	United Kingdom		x		x
JimJam (Czech) (4)	United Kingdom		x	x	x
KidsCo (German)	United Kingdom			x	
Nickelodeon (Czech) (5)	United Kingdom			x	x

Source: OBS / MAVISE database May 2013

(1) Also available in Hungarian and Romanian on satellite

(2) Also available in Greek, Hungarian, Polish, Romanian on satellite

(3) Also available on Romanian

(4) Also available in English, Hungarian, Romanian

(5) Also available in Hunarian, Romanian, Russian on satellite

### Most popular programmes 2012

The Slovak data for the most watched programmes in 2012 by children shows the dominance of private broadcasters and also of foreign content, particularly movies and talent show formats.

## A.35 Turkey (TR)

### **Channel distribution 2012**

Turkey has a number of dedicated national children's channels that include eight private and one public channel. This may explain the small number of other national and pan-European children's channels available in the country. The transmission of most of the children's channels is through cable and via satellite.

<b>TABLE TR1: NATIONAL AND FOREIGN CHILDREN'S CHANNELS TURKEY</b>			
Channel name	Statute	Country of origin	Distribution
JOJO	Private	Turkey	Satellite
Kidz Animez	Private	Turkey	Cable/ Satellite
Luli TV	Private	Israel	Satellite
Maxi TV	Private	Turkey	Cable/ Satellite
Minika Çocuk	Private	Turkey	Cable/ Satellite
Minika Go	Private	Turkey	Cable/ Satellite
Smart Çocuk	Private	Turkey	Satellite
TRT Çocuk	Public	Turkey	Cable/ Satellite / IPTV
TV 2 (Turkey)	Private	Turkey	Cable
Yumurcak TV	Private	Turkey	Cable/ Satellite / IPTV

Source: OBS / MAVISE database May 2013

<b>TABLE TR2: PAN EUROPEAN CHILDREN'S CHANNELS TURKEY</b>					
Channel name	Country of origin	Digital Terrestrial	Cable	IPTV	Satellite package
Cartoon Network Turkey	United Kingdom		x		x
Disney Channel (Turkish)	United Kingdom		x		x
JimJam (Turkish)	United Kingdom				x
KidsCo (Turkish) (1)	United Kingdom		x		x
Nickelodeon (Turkish)	United Kingdom				x
Nick Junior (Turkish)	United Kingdom				x

Source: OBS / MAVISE database May 2013

(1) Also available in English on satellite

### **Most popular programmes 2012**

The most popular genres among the Turkish children audience aged 5 to 11 are television series and entertainment content. All programmes are exclusively Turkish productions and are broadcast on private Turkish television channels. All programmes are aired during evening prime time, most of them during the week. Drama, crime historical soap series feature particularly strong among the Turkish children. With two exceptions and slight differences in order, the top five programmes among the group of 12 to 14 year olds are almost the same. These rankings are similar to the preferences of the Turkish youth (aged 15-34).

## **ANNEX 1**

### **NOTES ON THE VALIDITY OF COMSCORE DATA REGARDING CHILDREN'S AUDIENCES**

The comScore panel that is the base for demographic information is recruited online and the following principles are applied for people under 18. comScore reports on 6+ online population in the UK, 6+ in France, 6+ in Germany, 4+ in Spain, 15+ in Italy. However, comScore does not allow children to install the meter – the person that installs the meter has to be at least 18 years of age and capable of entering into a binding agreement, be the parent or legal guardian of anyone under 18 having access to such computer, own or control the computer. The installing person provides consent with the measurement on behalf of all users of the computer where our meter is installed.

People under 18 (users of machines with our meter) are identified by our proprietary technology SAT (Session Assignment Technology). SAT verifies information provided by panelists at the stage of install (there is a short questionnaire including questions about number of children in the HH and how many children use the computer) and builds a demographic profile of each regular user of a panel machine. SAT collects information about machine users over time (e.g. demographics reported by the panelists themselves; demos and other info captured from visited sites as can be e.g. login info or cookies; data coming from databases of third parties) and on the bases of it SAT creates roster of users (=persons that are browsing from the machine). Children are identified via this process (as any other person) and once sufficient demo information is collected and verified these young users become standard part of the roster and the machine can go into the further processing of the collected data.

However, younger children require a specific approach. Children under 14 rarely self-identify online via login events and other key information, due to privacy concerns, co-viewing with other household members, or navigating by the parent even though the child is the consumer of the content. Because of this, relying on clues for identifying children presents a challenge to SAT. However, if activity is observed on a machine that is indicative of a child under 14, and there was previously not enough information via login or form submission events and other key identifiers to identify the child's actual demographics, we can be reasonably certain that there is a child using the machine and we create a temporary placeholder in the roster. For behavior to qualify as being "child-like", most of the websites visited during a session have to fall within an already specified (and periodically refreshed) list of children's websites. Demographics are then assigned to these "found" children via age and gender models, which compare their web activity to that of known children who were active in the last 4 months, and whose age and gender is known. Based on this comparison, the models output the gender and age bracket (6-11 or 12-14 years old) that most likely correspond to the web behaviors of

individual “found” children. These demographic values for “found” children remain static until enough information is seen to change or update them.

To make the SAT picture complete, the other and equally important goal of SAT is to assign activity on a machine to one of the potential users. There are in principle two types of sessions - Marked and Unmarked sessions. The Marked sessions are the ones where we observed some clues (e.g. email, username, password, etc.). If clues from traffic aren't captured during a session (=Unmarked sessions), the sites visited and the time of day together with the typing behavior observed are used to model user session assignment.

Representativity of children – the sample size differs by country. To balance the sample and reduce potential bias the sample is weighted on several factors (differ by country) – the basic weighting contains age and gender segments everywhere and specific projection targets for Males/Females 6-14 are calculated (when applicable).

Demographic data about video games are not currently available at comScore (at least for EU), we have data about www sites (and streams) of games and on-line games. If we speak about apps connecting to internet comScore is dependent on publishers if they tag their content/apps and thus the current coverage of apps cannot be seen as sufficient. Demographic data about apps' users is a task that requires further development due to different platforms involved (tablets, Smartphones, Win8).

## **COMSCORE VIDEO MEXTRIX CONTENT CATEGORY AND SUB-CATEGORY DEFINITIONS**

Following is a complete list of comScore Media Metrix categories and sub-categories with their definitions, including examples of the media that is included in the category:

1. **Auctions** - Sites that allow users to bid on a multitude of items. Examples: Ebay.com, Bidz.com, Ubid.com

2. **Automotive** - Automotive sites and buying guides, automotive publications, automotive news and information, and racing sites.

1. **Resources** - Provides price quotes, specifications on car parts, and information on buying a car. Examples: Cars.com, Kbb.com

2. **Manufacturer** - Car companies. Examples: Acura.com, General Motors, Chrysler

3. **Business/Finance-Sites** - that focus on stock market news, research, stock quotes, online trading, insurance, personal finance, investments, investment and finance magazines, retirement planning, estate planning, economics. Examples: Chase Property

1. **Banking** – Sites that include corporate banks and allow users to conduct online banking. Examples: Chase.com, Bankofamerica.com, WellsFargo.com

2. **News/Research** - Sites with news on the stock market or financial companies. Examples: Bloomberg.com, TheStreet.com
  3. **Online Trading** - Sites where users can trade stocks online and receive other financial services. Examples: Ameritrade.com, Etrade.com, Schwab.com
  4. **Personal Finance** - Sites that allow users to pay bills online, keep track of their finances, provide information on retirement and 401K and allow users to apply Online for Credit Cards. Examples: Americanexpress.com, Creditreport.com
  5. **Financial Information/Advice** - Sites offering information on mortgages, loans, insurance or mutual funds. Examples: Vanguard.com, Eloan.com, AllState.com.
  6. **Taxes** - Sites that allow users to get information on their taxes, or file taxes online. Examples: Turbotax.com, H&R Block
4. **Business to Business** - Sites that focus on business-to-business commerce rather than business-to-consumer. Examples: Business.com, Yahoo! Small Business
  5. **Career Services and Development** - sites that provide information and services related to finding a job or changing, developing or advancing one's career. It includes: job search; career and salary advice; relocation services; and career-related training and education.
    1. **Career Resources** - sites that contain content or services for the following career-related areas: Job Details, Resume Posting, Career Advice, Salary Information, Interview Skills, Negotiation Skills. Examples: Yahoo! HotJobs, Indeed, SimplyHired, Inc.
    2. **Job Search** - consist of URLs within the major properties that correspond to the results page presented after conducting a job search. Examples: CareerBuilder.com Job Search, Monster.com Job Search
    3. **Training and Education** - sites that provide education and training content and services that help people advance their careers. Examples: Livecareer.com, Fastweb
  6. **Community** - Sites that have content that is geared toward a particular group of people with common/similar hobbies or interests.
    1. **Beauty/Fashion/Style** - Sites that focus on beauty, fashion and style trends. Examples: Instyle, Elle Group
    2. **Family & Parenting** - Sites that focus/contain information, products and/or services on parenting, ancestry or family history. Momlogic.com, Ancestry Sites, Babyzone.com
    3. **Food** - Sites that provide restaurant reviews, recipes, cooking tips and meal plans. Examples: Allrecipes.com, Foodnetwork.com
    4. **Gay/Lesbian** - Sites that list Gay/Lesbian events, news topics and chats for the Gay community. Examples: Gay.com, Planetout.com

5. **Green** - Organizations and content sites focused on information regarding environmental/sustainability issues such as “Going Green”, recycling/reusing, green technology, sustainable business practices, energy and natural conservation and application of green practices. ex: Treehugger.com, Nature.com

6. **Home** - Sites that provide information on decorating, home improvements and gardening. Examples: HGTV, DIY Network

7. **Lifestyles** - Sites that provide advice geared for the improvement of one’s habits, attitudes and overall well-being towards making one’s life simpler. Example: eHow Lifestyle, AOL Lifestyle

8. **Personals** - Sites that contain personal ads and information on dating, love and matchmaking sites. Examples: True.com, Match.com Sites, Date.com

9. **Pets**: sites that provide information, products and services dedicated to pet lovers, owners or aficionados ex: Pawning.com, Dogster.com, Petco.com

10. **Religion/Spirituality** - Sites that contain information about different religions and religious organizations. Examples: Gospelcom.net, Religioustolerance.org

11. **Teens** - Sites that contain information that is geared towards teens. Examples: Tagged.com

7. **Corporate Presence** - Sites that provide corporate information OR an entity that is a conglomerate of multiple brands/businesses owned by a single holding company. Examples: Turner Digital, Proctor & Gamble

8. **Directories/Resources** - Sites that provide directories, references, maps, classifieds, shipping/postal tracking, yellow & white pages, e-mail and web directories, dictionaries, encyclopedias and almanacs. Example: Mapquest

1. **Directories** - Sites that provide listings/indexes such as a 411 directory or a site containing listings of doctors, plumbers, construction companies, etc. Examples: Whitepages.com, Yellowpages.com

2. **Reference** - Sites that provide online dictionaries, almanacs, thesauruses and encyclopedias. Examples: Dictionary.com Sites, Yahoo! Answers

3. **Classifieds** - Sites that provide lists of cars, pets, apartments, homes, jobs and other services. Example: Craigslist.org, Backpage.com

4. **Shipping** - Sites that allow users to schedule pick-ups, track packages and find out shipping rates. Example: UPS Sites, FedEx

5. **Maps** - Sites that feature online mapping, driving directions, and traffic information. Example: Google Maps, Traffic.com



9. **Education** - Sites that offer courses, curriculum, sites that end with edu, and provides tutorials.

Examples: UTexas.edu, Scholastic.com

1. **Information** - Sites that provide information on institutions, degrees, and scholarships.

Example: Pearson Education

10. **Entertainment** - Sites that contain information related to TV, Movies, Music and Music Players.

Example: UGO.com

1. **News** - Site that provide news on movies, celebrities, musicians and TV. Examples: TMZ, People

2. **Movies** - Sites for movies, movie studios and movie related content. Examples: Moviefone.com, Ifilm.com, IMDB.com

3. **Music** - Sites that provide music news, concert info, contests, and music related content. Examples: Vevo, Yahoo! Music

4. **Humor** - Sites that provide jokes, funny pictures and humorous cartoons. Examples: FunnyorDie, Funnyjunk.com

5. **Multimedia** - Sites that contain video clips, audio clips or some other kind of interactive media such as shockwave/ flash etc. Examples: Youtube.com\*, Hulu

6. **Kids** - Activities and games online for kids. Examples: Nickelodeon Kids & Teens, Cartoon Network Sites

7. **TV** - TV station sites, TV guides and sites that are specific to television shows. Examples: ABC.com, Nbc.com

8. **Radio** - Online Radio Stations and sites for Radio stations. Examples: Pandora.com, AOL Radio

11. **Government** - All sites that contain information on voting, the election and sites ending with .gov.

Examples: FBI.gov, State.tx.us, Army.mil

12. **Health** - Sites containing diet information, exercise programs, health and fitness, diseases and medical journals. Examples: Qualityhealth.com

1. **Information** - Pharmaceutical company sites and sites that deal with diseases, injuries, nutrition and medication. Examples: Lifescript.com WebMD Health

2. **Pharmacy** - Sites where users can refill prescriptions find out information on medications and find drug store locations and information. Examples: Caremark.com, Medco.com

13. **ISP** - Internet Service Providers. Examples: Roadrunner, Att.net

14. **Games** - Sites where consumers can play online video games or find information on video games. Example: EA Online

1. **Online Gaming** - Sites where users can play online video games, either alone or with other players. Examples: Addictinggames.com, Y8.com
  2. **Gaming Information** - Sites where consumers can find information on video games, and where users can learn how to more effectively play video games. Examples: GameSpot, IGN Entertainment
15. **Gambling** - Sites where users can participate in virtual casinos and online gambling and get information on lottery drawings. Example: PokerStars
1. **Lottery/Sweepstakes** - Sites where users can get information on lottery drawings. Examples: PCH.COM, Powerball.com
  2. **Online Gambling** - Sites where users can participate in virtual casinos and online gambling. Examples: FullTiltPoker
16. **News/Information** - Sites that provide news and information regarding domestic and international issues. This category also contains sites with articles and periodicals on current events and weather. Examples: New York Times Digital, CNN Network
1. **General News** - Sites for newspaper online publication, magazine publications, sites with news content and Television news organizations. Examples: FOXNews.com, MSNBC Network, Cbs News
  2. **Newspapers** - Online newspaper sites that provide general news and information regarding domestic and international issues. Examples: Washingtonpost.com
  3. **Weather** - Sites that provide weather forecasts for locations throughout the world. Examples: Accuweather.com, Weather.com, Weatherbug.com
  4. **Politics** - News sites that focus primarily on Politics. Examples: Politico.com, Moveon.org
17. **Portals** - A destination site that offers users a variety of content areas designed to meet a majority of a user's online experience needs. A portal is a broad, generic category and not specific to any particular group. Portals must have the following features: broad-based content, e-mail, search, chat and appeal to a broad mass audience. Examples: Yahoo! Sites, Microsoft Sites, AOL LLC
18. **Real Estate** - Sites that provide information on real estate listings, apartments/homes, commercial property, real estate agents and moving guides for local areas. Examples: Zillow.com, MSN Real Estate
19. **Regional/Local** - Sites that contain local content, city guides and restaurant guides. Examples: CBS Local, Yelp.com
20. **Retail** - E-commerce and online transaction sites that include manufacturers and retailers.
1. **Apparel** - Sites where users can buy clothing online. Example: Asos.com, Gap

2. **Books** - Sites where users can purchase books and other written materials. Example: BN.com, AbeBooks
3. **Music** - Sites where users can purchase/pay for Music (CD's, Cassettes, etc.) offline as well as streaming music online Example: Guitar Center, Inc., Cduniverse.com
4. **Movies** - Sites where users can purchase/pay for Movies (Blueray, DVD's, VHS tape, etc.) offline as well as streaming movies online Example: Blockbuster Inc.,Netflix.com
5. **Computer Software** - Sites where users can purchase computer software. Examples: Avg.com, INTUIT.COM
6. **Consumer Electronics** - Sites where users can purchase electronics (Radios, TV's, VCR's, etc.). Example: Bestbuy.com, RadioShack Corporation
7. **Consumer Goods** - Sites where users can purchase household items and supplies. Example: Office Depot, Staples.com Sites
8. **Department Stores** - Sites where users can purchase goods from a department store online. Examples: Target Corporation, Kohls Corporation
9. **Flowers/Greetings/Gifts** - Sites where users can purchase Cards, Gifts and Flowers. Example: 1-800-Flowers.com, Build-A-Bear Workshop, Inc., Hallmark
10. **Jewelry/Luxury Goods/Accessories** - Sites where users can purchase jewelry, luxury goods and accessories. Examples: Tiffany.com, Coach.com, Kay Jewelers
11. **Healthcare** - Sites where users can purchase vitamins, herbal remedies, diet aids and cosmetics. Example: Riteaid.com, Vitaminshoppe.com Sites
12. **Mall** - Sites where users can purchase a variety of items from different online vendors. Example: Sam's Club, Simon.com
13. **Sports/Outdoor** - Sites where users can purchase outdoor equipment and sports equipment. Example: Sportsauthority.com, Basspro.com
14. **Toys** - Sites where users can purchase toys and games for children. Example: Toywiz.com, Fisher Price
15. **Food** - Sites where users can purchase groceries, beverages and food products. Example: Safeway.com, Omahasteaks.com
16. **Fragrances/Cosmetics**- Sites where users can purchase Fragrances, perfumes, make-up, cosmetics. Example: Sephora.com, Esteelauder.com
17. **Comparison Shopping** - Sites that allow users to compare prices or guide users in their online shopping experience. Examples: MySimon.com, Shop.com, AOL Shopping
18. **Home Furnishing** - Sites where users can purchase furniture and decorative items. Examples: Lowes.com, CrateBarrel.com

19. **Computer Hardware** - Sites where users can purchase computers, computer hardware and computer accessories such as printers, scanners and mouse pads. Examples: Dell.com, Hewlett Packard

20. **Tickets** - Sites where users purchase tickets for concerts, sporting events, movies and theater. Examples: Ticketmaster.com, Movietickets.com

21. **Search/Navigation**- Sites that are designed to help consumers find information from across the Web and which derive most of their result pages from search submissions or result pages. These sites allow users to ask for content meeting specific criteria (typically through the user entering a specific word or phrase) and retrieve results that match those criteria. The page containing the results would also allow the user to either refine their initial search or initiate a new search. Examples include Google Search and Yahoo! Search.

22. **Social Media** – Sites where the creation and consumption of content is user generated or sites that serve a social networking role. Example: Blogger.com and Facebook.com

1. **Blogs** - Site where users post informal journals of their thoughts, commentaries and philosophies. This online journal is frequently updated and intended for general public consumption. Examples: Blogger.com, Xanga.com

2. **Social Networking** - Social Networking provides a virtual community within Internet web sites and applications to help connect people interested in a subject. Social networking sites offer a way for members to communicate by voice, chat, instant message, videoconference and blogs. These groups of people use a variety of tools such as email, messaging, photo sharing, etc. to connect. Examples: Facebook.com, Myspace.com

23. **Sports** - Sites that offer fantasy leagues, scoreboards, sporting news, sports magazines and other sport-related sites. Examples: ESPN, NFL Internet Group, SI.com

24. **Technology** - Sites that offer technology news/reviews/information and/or services on general electronic gadgetry, hardware and software. Example: Mozilla.org, McAfee.com Sites

1. **News** - Sites that provide technology business news, analysis and research. Examples: AOL Tech, Wired

25. **Travel** - Sites that function as online travel agencies, travel service providers (e.g., airlines, hotels, car rental agencies), discount travel sites, and travel information resources. Examples: Expedia Inc, Yahoo! Travel, Hertz, Hampton Inn, United Airlines.

1. **Airlines** - All airline sites--most of which support online transactions--plus any third party travel sites that provide information and/or transactions for only air travel. Examples: JetBlue, American Airlines

2. **Car Rental** - All Car Rental sites, most of which support online transactions. Examples: Enterprise.com, Avis.com, Hertz

3. **Ground/Cruise** - Sites that provide information and/or transactions for rail, bus, and ship travel. Examples: , Greyhound, Carnival
  4. **Hotel/Resorts** - Sites that contain information and/or transaction capabilities for resorts and hotels. This sub-category also includes casinos that allow consumers to find information or book transactions at their hotels. Examples: Starwood Sites, Marriott, Hotels.com
  5. **Information** - Sites that provide information on hotel reservations, air travel reservations, maps, discount travel options/packages. These sites do not support transactions. Examples: Yahoo! Travel, TripAdvisor.com
  6. **Online Travel Agents** - Sites that allow users to get information and/or book transactions related to a variety of travel services. Examples: Expedia Inc, Travelocity, Hotwire
  7. **Transactions** - Sites that allow users to make online airline, car rental, train, bus and hotel reservations. Examples: Viator.com
26. **Services** - Internet services including message boards, chat and news groups, free hosting services, wallpaper and clip art downloads, coupon and incentive sites and e-mail. Example: Atrinsic, Inc.
1. **Discussion/Chat** - Sites that provide users with chat rooms and free message board services. These sites provide an outlet for users to voice opinions, ask questions and interact with other online users. Examples: Keen.com, Voy.com
  2. **E-mail** - Sites that exclusively provide e-mail services. Examples: Yahoo! Mail, AOL Email, Hotmail, Google Gmail
  3. **Incentive** - Sites that offer promotional deals, free stuff and registration for free stuff. Examples: Slickdeals.net
  4. **Downloads** - Sites that enable users to download applications from the site. Examples: CNET Download.com, Bearshare.com
  5. **Coupons** - Sites that provide users with discounts, coupons and incentives. Examples: Groupon.com, LivingSocial.com
  6. **Web Hosting** - Sites that host free web sites for users. Examples: Lycos Angelfire, Webs.com
  7. **E-cards** - Sites that allow users to send cards online. Examples: AmericanGreetings Property, Hallmark.com, Evite.com
  8. **Instant Messenger** - Applications that allow users to send instant messages to other users online. Examples: AOL Instant Messenger, Yahoo! Messenger, MSN Messenger Service, ICQ Instant Message

9. **Photos** - Sites which allow users to upload photos to the Web, order prints, and share photo albums. Offer photo advice. Manufacture and/or sell photo-related products. Examples: Webshots.com, SnapFish

27. **Telecommunications** - Sites of companies that provide voice, data, and video communications services to the consumer market. Examples: Sprint Nextel Corporation, AT&T Properties

28. **Promotional Servers** - Sites that sell e-mail lists, opt-in e-mail providers, image servers and promotional links. Examples: Edgesuite.net

29. **XXX Adult** - Adult content sites