

**THINK**



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INDIA



# A Peek into **KIDS** Viewership





Even in today's technology enabled world, where little ones have access to digital devices and alternate media platforms, Television continues to play a great role in the lives of Kids when it comes to consuming media and entertainment at home. In this edition of THiNK, our focus will be the young viewers (2-14 yrs) as we attempt to decode their viewership patterns on television. Kids as a target group are of interest not only to broadcasters but also advertisers, due to the potential they have in influencing the household purchases.

## **We aim to cover the following topics:**

- 1) What is the viewership contribution of Kids as an audience to Total TV, and how is this viewership spread across Kids specific channels, and non-Kids channels.

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- 2) Which channel genres drive maximum engagement for Kids, and if these genre preferences differ by gender.

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- 3) What is the TV consumption pattern of Kids vis a vis programme theme and programme language preferences.

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- 4) What is the extent of control that Kids have on the TV remote across a day.

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- 5) What is the receptivity of children to various ad sectors on television.

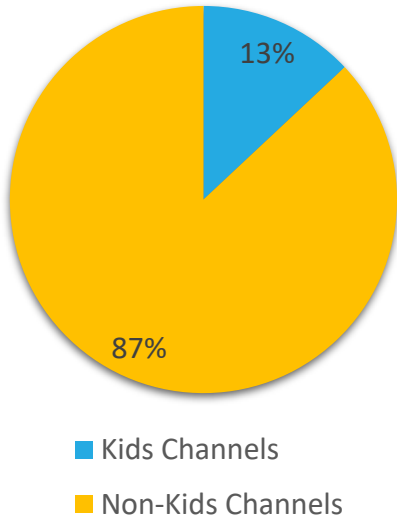
(Source: BARC India, BMW Data; Period: 20 wk. avg. (Wk08-Wk27, 2017), TG: 2-14 years, Mkt: All India, Channels Considered: All)

Kids Channels include: Cartoon Network(v), Pogo TV(v), Disney Channel(v), Disney Junior(v), Hungama(v), Disney XD(v), NICK Junior(v), NICK(v), Sonic Nickelodeon(v), Maha Cartoon TV, Nick HD+(v), Toonami, Discovery Kids, Chintu TV, Kushi TV, Kochu TV, Chutti TV, MUBU TV, Sony Yay

For all virtual channels, programme language is recorded in the primary playout language only

Cartoon/Animation programmes are classified under 'Miscellaneous' as per the BMW Software

### All India | 2-14 yrs



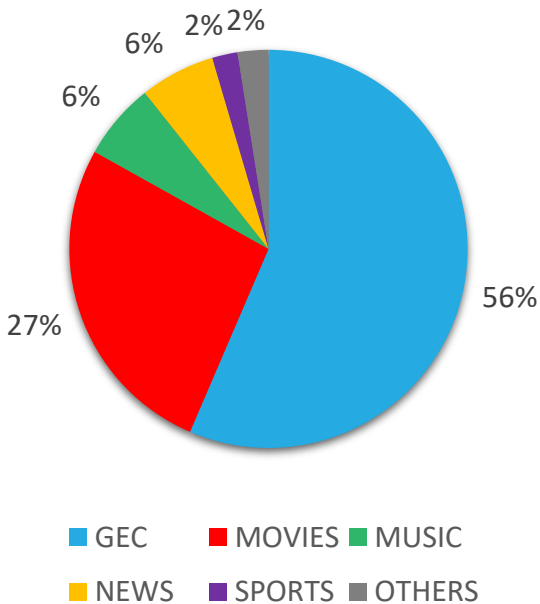
% share of Impressions

**Kids as an audience i.e. the age-group of 02-14 years, accounts for 20% of total TV impressions.** This is the highest share across all age cuts.

This 20% is further split between channels whose primary audience are Kids and all other channels where Kids are the incidental viewers. As depicted in the graph, **non-Kids channels dominate with 87% of viewership share.** This massive viewership of non-Kids channels could be due to co-viewing.

Keeping in mind the massive share of eyeballs that kids contribute to non-Kids channels, let us further look at the genre split and preferences of Kids audience on these channels.

### All India | 2-14 yrs



% share of Impressions

GEC Channels and Movie Channels together account for over **80% of Kids viewership on Non-Kids Channels**, of which GEC channels dominate the larger share.

Music channels and News channels also seem to be more popular among Kids in comparison to the rest.



## Genre Preference by Gender

Genre	2-14 Yrs Male	2-14 Yrs Female	Difference
GEC	54%	59%	4%
MOVIES	29%	25%	-4%
MUSIC	6%	7%	1%
NEWS	6%	6%	0%
SPORTS	3%	2%	-1%
INFOTAINMENT	1%	1%	0%
OTHERS	2%	2%	0%

% share of Impressions

While the relative ranking of Genres remains constant across both genders, we see some difference in the shares they enjoy.

The kids' viewership on non-Kids channels is dominated by GECs followed by Movies for both genders.

However, boys show a relative preference for Movies and Sports content, whereas girls tend to view more GEC and Music content.

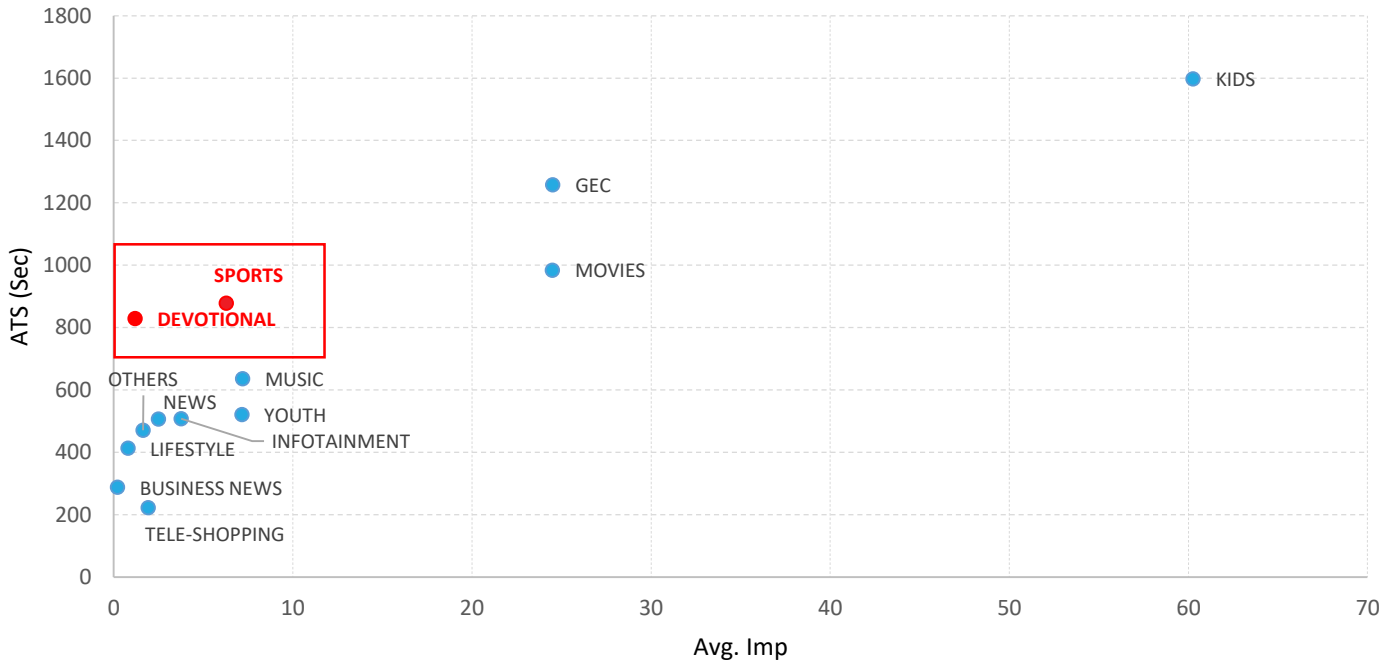
**This could suggest that kids demonstrate gender behaviour similar to adults from an early age, and these are reflected in their TV viewing habits as well.**



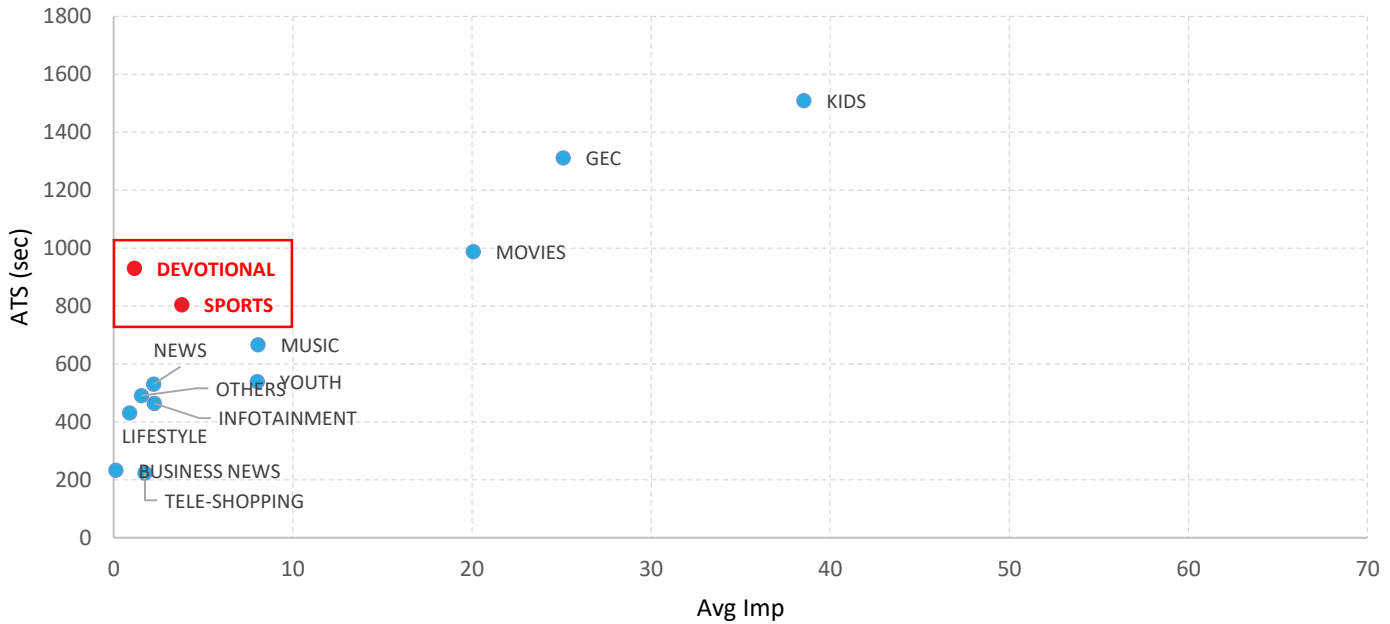


# CONTENT STICKINESS ACROSS KIDS AND NON-KIDS CHANNELS

### ATS-Imp 2-14 Males | All India



### ATS-Imp All India | 2-14 Females



Looking at genre consumption at a time-spent level reveals some more insights into content stickiness.

Content aimed primarily at Kids as a primary target clearly works best for both boys and for girls as is visible in the graphs. With an average time-spent of about 25 minutes on any channel in the genre, for both genders, Kids genre is clearly the preferred and most sticky channel for Kids.

However, it is interesting to note that on an average, boys deliver approximately 50% more eyeballs on Kids channels than girls. This may be suggestive that the content mix on Kids channels may be skewed more towards male viewers than female.

The Top 3 channel genres that engage Kids the most remain constant for both boys and girls, being Kids, GEC and Movies. Beyond which, there are noticeable differences in terms of time-spent across genres. While boys have a higher time spent on traditionally Male genres like Sport and Infotainment, girls have a higher time spent on Devotional, Music, Youth and Lifestyle channels.









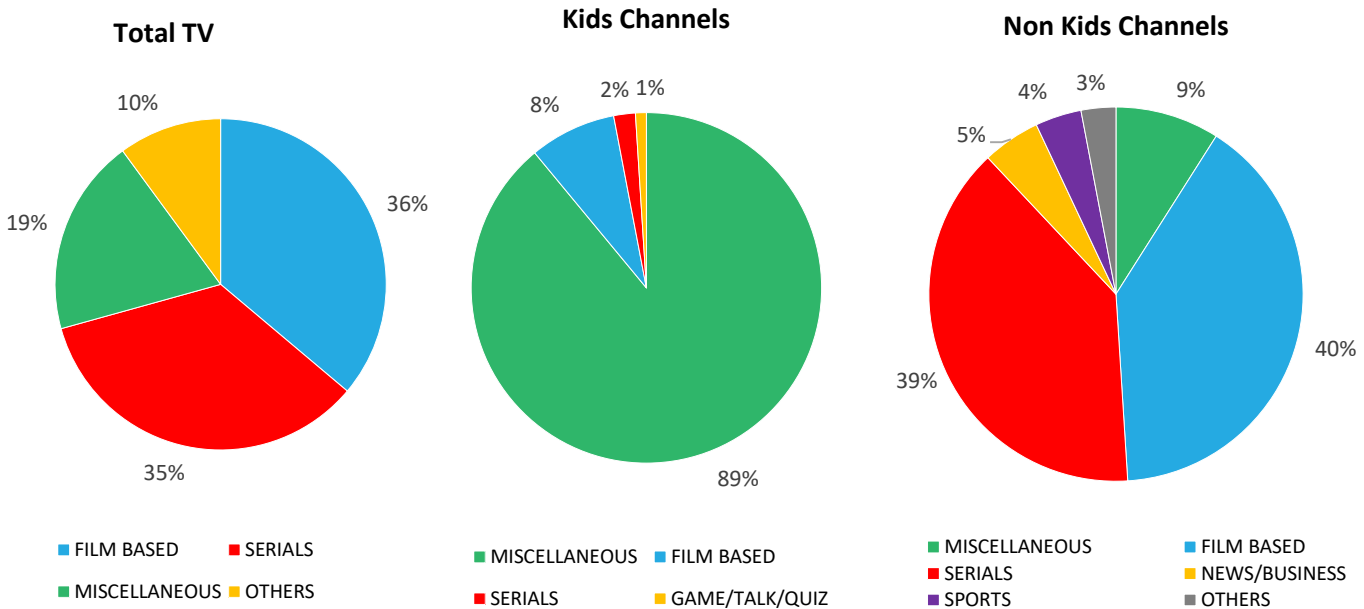


# PROGRAMME THEME PREFERENCE

Having fairly understood the genre preferences, lets further dive into the content preferences of kids by comparing their programme theme preferences

**It is imperative to note that Cartoon/Animation programmes are classified under 'Miscellaneous' as per the BMW Software.**

## All India | 2-14 yrs



% share of Normalized Impressions

As can be seen, the three dominant programme themes for Kids are Cartoons / Animation (on kids channels, classified as Miscellaneous), Film-based content (across both Kids channels and non-Kids channels) and Series (typically on GEC channels).

There is also some active consumption of various Science & Education programmes, Events, Concerts, Award show (classified as Miscellaneous under Non-Kids channels)

However, it must be noted that the popularity of programme themes is also subject to its availability. For example, on Kids channels, Miscellaneous content (i.e. cartoons / animation) commands a 91% share of content duration. It is therefore not surprising that it has an 89% share of viewership.



# WATCHABILITY (IMPRESSIONS-DURATION RATIO)





Impressions-Duration ratio is a metric which tells us how many impressions are being delivered per second of the total fixed air time. The higher the ratio, the better the conversion.

Programme Theme	Imp/ Duration ratio	
	Kids Channels	Non-Kids Channels
FILM BASED	20.0	2.0
GAME/TALK/QUIZ	10.0	1.7
MISCELLANEOUS	6.0	0.7
NEWS/BUSINESS	3.0	0.3
MUSIC	2.0	0.3
NATURE/TOURISM	2.0	0.4
SERIALS	2.0	4.8

$$\text{Ratio} = (\text{Impressions} / \text{Duration} * 100)$$

As we had discussed that the popularity of programme themes is also subject to its availability, looking at the impression/ duration ratio, we can see that Serial content on Kids channels does not translate to very high Impressions. But on non-Kids channels, Serials deliver the best impression/duration ratio.

Interestingly, Film based programmes deliver the best impression/duration ratio on Kids channels, and the second-best impression/ duration ratio on non-Kids channels.

This re-iterates to us that Film based content works extremely well with children, be it catered specifically to them on Kids channels, or consumed incidentally on non-Kids channels.

News/Business programmes on Kids genre are being featured by regional channels.



സ്വാഗതം  
स्वागत हे  
തക്കിയിതയ്  
pagdating  
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LANGUAGE PREFERENCE

Selamat datang  
Welcome



**As we look into the television consumption of kids by language, it must be kept in mind that for all virtual channels, programme language is recorded in the primary playout language only.**

Programme Language	Universe Total TV	2-14 Total TV	Difference
HINDI	51%	59%	8%
TELUGU	12%	11%	-1%
TAMIL	12%	9%	-2%
HSM REGIONAL	9%	7%	-2%
KANNADA	7%	6%	-1%
ENGLISH	4%	5%	1%
MALAYALAM	4%	3%	-1%
HINDI+ENGLISH	1%	0%	-1%

% share of Normalized Impressions

Hindi language includes Dubbed-Hindi

HSM Regional languages comprise of Assamese, Bengali, Bhojpuri, Gujarati, Kashmiri, Marathi, Oriya and Punjabi

Kids' preference for languages at an overall level reflect the larger universe, with Hindi being both the dominant as well as over-indexed language in terms of viewership by kids.

Regional languages across the board typically see a marginally lower proportion of viewing among kids, while English sees a marginally higher proportion of viewing.

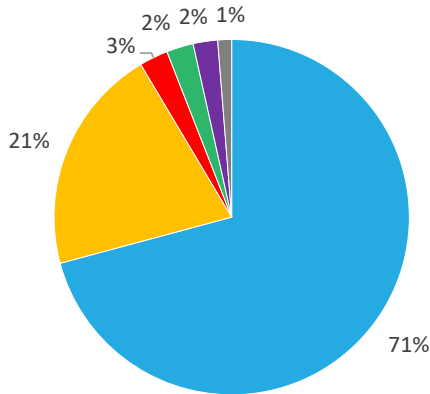
Let us delve deeper into these preferences through their content consumption on Kids and non-Kids channels.





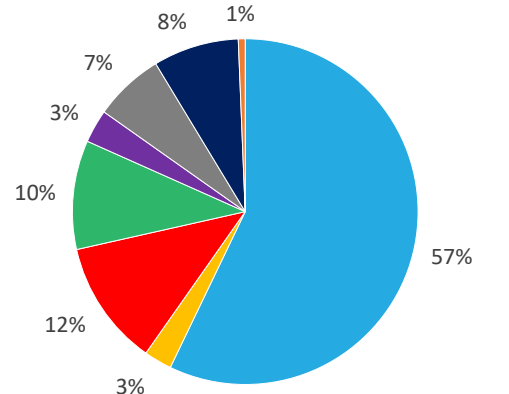


**All India | 2-14 yrs  
Kids Channels**



■ HINDI    ■ ENGLISH    ■ TELUGU  
■ TAMIL    ■ MALAYALAM    ■ KANNADA

**All India | 2-14 yrs  
Non Kids Channels**



■ HINDI    ■ ENGLISH    ■ TELUGU  
■ TAMIL    ■ MALAYALAM    ■ KANNADA  
■ HSM REGIONAL    ■ HINDI+ENGLISH

% share of Normalized Impressions  
Hindi language includes Dubbed-Hindi

HSM Regional languages comprise of Assamese, Bengali, Bhojpuri, Gujarati, Kashmiri, Marathi, Oriya and Punjabi

A more divergent picture is presented when we separate viewership language by Kids and non-Kids channels.

The availability of content in more languages on non-Kids channels has led to a more fragmented viewership on these channels.

Whilst Hindi (which also includes Dubbed-Hindi content), continues to be the dominant language of viewership across both, the key take-out is the high English based consumption within Kids channels.

When Kids are consuming content exclusively on Kids channels, the propensity to consume English language content is much higher, than on non-Kids channels, where the remote is mostly controlled by the family, and Kids' viewership is incidental.

**This goes on to show that Kids are far more conversant with English as a language in comparison to the family unit, which continues to prefer and watch television in Regional languages.**

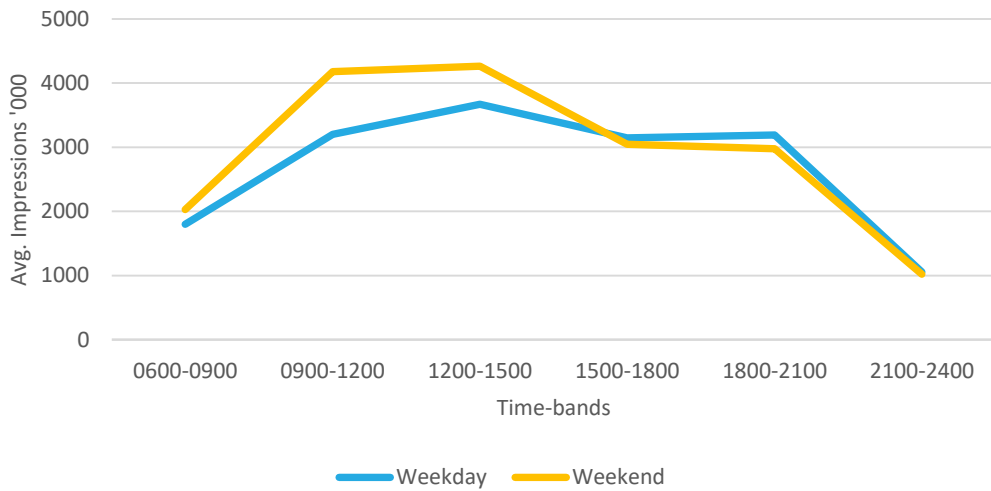


A young boy with dark hair, wearing a grey polo shirt and blue jeans, sits on a light-colored shaggy rug. He is wearing black 3D glasses with red and blue lenses and holding a black remote control in his right hand. A light-colored dog, possibly a Weimaraner, is lying on the rug next to him, also wearing 3D glasses. In the foreground, there is a yellow and green striped cup with a white straw. The background shows a light-colored sofa. The entire scene is framed by a yellow border.

**KIDS CONTROL  
ON THE TV  
REMOTE**

Having gained some insight into kids' consumption and viewing preferences on television, let us look at when kids are active on television. What does an average day look like for kids, and how does it vary while consuming content on Kids channels versus rest of TV

**Viewing by Daypart on Kids Channels  
2-14 yrs | All India**



**Viewing by Daypart for Non-Kids Channels  
2-14 yrs | All India**





Kids viewership on television increases gradually through the day from the morning till late afternoon (1500 hrs), after which the viewership drops.

**The major difference is witnessed post 1800 hrs, when Kids lose control of the remote, and the viewership shifts from kids channels primarily to general family entertainment channels.**

It is also interesting to note that the day-part viewing pattern of Kids on Kids channels corroborates with their weekly routine. The viewership on Kids channels peaks later on a weekday (1200-1500 hrs) as compared to on a weekend (when viewership peaks at 0900-1200 hours). This is likely because the older kids go to school in the morning. In the afternoon, these school-going kids are back home, thus adding eyeballs to television.

On weekends the kids are at home in the day (0600-1500 hrs), and hence the viewership is much higher across these time bands when compared to the weekday. But in the evening, they may step out to play with their friends or for a family outing, and hence the viewership dips slightly below the weekday average.



# AD SECTOR PERFORMANCE

Kids are increasingly becoming more influential in deciding the spending patterns of a household by convincing their parents to buy a brand or product of their choice. Let us look at the top 10 ad sectors that are most viewed by kids on television

## Top 10 Ad Sectors on Kids & Non-Kids Channels

	Kids Channels	2-14 yrs	Non-Kids Channels	2-14 yrs
1	Food & Beverages	45%	Personal Care/Personal Hygiene	24%
2	Personal Care/Personal Hygiene	14%	Food & Beverages	19%
3	Miscellaneous	10%	Hair Care	7%
4	Household Products	10%	Services	5%
5	Services	6%	Household Products	5%
6	Personal Healthcare	4%	Personal Healthcare	5%
7	Hair Care	3%	Miscellaneous	5%
8	Personal Accessories	2%	Laundry	5%
9	Laundry	2%	Auto	4%
10	Retail	1%	Durables	3%

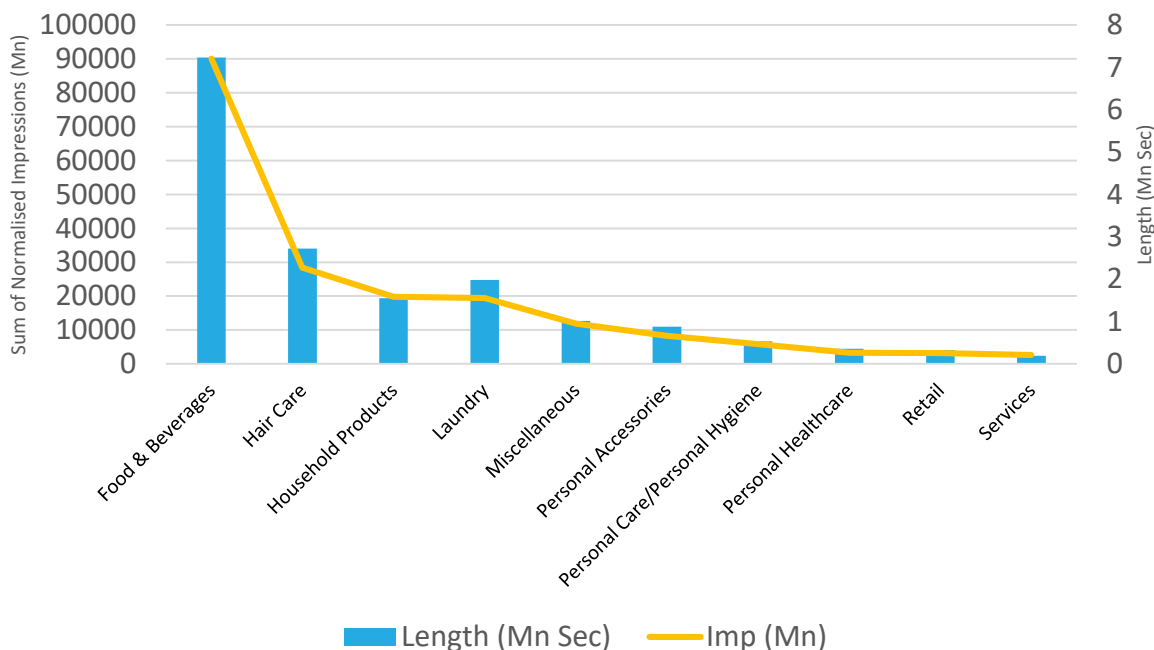
% share of Normalized Impressions

The top 10 ad sectors viewed by kids on Kids channels, remain largely the same on non-Kids channels. The only exceptions are the Auto and Durables ad sectors, which are absent in the top 10 sectors on Kids channels.



We notice significant differences in the relative share and ranking of each of the ad sectors across the genres. However, these differences can likely be attributed to the differences in content and availability between Kids & non-Kids channels.

Let us look at the effectiveness of these ad sectors present on Kids channels, with respect to Impression-Duration ratio.



Quite evidently, Food & Beverages is the most advertised sector on Kids channels, and garners the maximum impressions as well.

However, looking at the effectiveness, Household Products and Miscellaneous ad sectors perform better in delivering kids impressions with respect to commercial time. The Household Product sector is primarily being driven by the mosquito repellent category, whose ads are typically kid oriented and feature children a lot. On the other hand, Miscellaneous ad sector includes kid-friendly categories such as Toys Indoor Games, Writing Instruments, Stationery and Film Trailors amongst others.

Except for Retail and Service sectors, all other sectors in the top 10 are regular consumption/ FMCG products, which indicates that kids are increasingly watching such ads on television and are able to influence family purchase decisions.



## SUMMARY

- Kids as an audience account for the highest share of Total TV impressions (20%) across age cuts. Of this, majority of viewing takes place on non-Kids channels, which can be attributed to co-viewing.
- Film based content is extremely popular among Kids across television. Along with Serials and Miscellaneous programmes (primarily cartoons & animation), it comprises the top 3 content preferences for Kids
- There are noticeable gender biases that emerge among kids when we look at their TV genre preferences and content stickiness in terms of average time-spent.
- Kids are far more conversant and comfortable in viewing English language programmes on television as compared to the family unit, who prefer consuming television in regional languages.
- Viewership on Kids channels increases gradually through the day, till 1200-1500 hrs, after which a decline can be observed. This is because kids lose control of the remote, and viewership shifts from Kids channels to family entertainment channels.
- Kids are highly receptive to daily consumption/ FMCG sector advertisements such as Food & Beverages, Hair & Care, Household Products etc. Also because of co-viewing, it becomes easier for kids to influence their parents.









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