



Australian Government



**CHILD'S PLAY**  
ISSUES IN  
AUSTRALIAN  
CHILDREN'S  
TELEVISION 2013

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## FOCUS ON THE BROADCASTERS

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Television broadcasters play a crucial role in the children's content sector. They contribute to a production financially, provide a platform to reach audiences and implement programming strategies which have a significant impact on the success or failure of a program.

- **Programming strategies:** The on-air schedules of the free-to-air broadcasters, including their catch-up services, and the three dedicated children's subscription television channels were analysed in order to shed light on their strategies for programming and promoting children's content.
- **Commercial breaks:** The content of commercial breaks broadcast during children's programming blocks was analysed in order to gain insights into how the commercial free-to-air networks promote children's programs. In addition, the programming strategies for specific programs were analysed as case studies.

This paper is part of a series produced to inform discussion around children's television in Australia. The other papers and the summary report *Child's Play: Issues in Australian children's television 2013* can be accessed at [www.screenaustralia.gov.au/childsplay](http://www.screenaustralia.gov.au/childsplay)

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3 MAY 2013

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## Key findings

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- Broadcasters' programming strategies for children's content are constantly evolving. They generally vary between broadcast platforms and channel groups, and can be affected by issues such as government legislation, output deals, marketing campaigns and the time of year. Network commitments to live events such as sport, competitor programming, advertiser sponsorship, changes in network schedulers and available network resources can also have an influence.
- Broadcasters are making use of multiple channels when scheduling children's content: the free-to-air networks have moved most foreign-produced content to the digital multi-channels; the ABC uses its channel group to target children of different ages; and the main subscription children's channels have launched secondary channels for preschool content.
- Children's programs on the commercial free-to-air networks are predominately packaged together into blocks. On the main channels, the blocks tend to be short and often subject to shifts and cancellations to accommodate live sport on weekends. Children's blocks on the digital multi-channels are longer and more robust.
- The commercial main channels have retained only the minimum levels of children's content (including Australian content) required to meet government mandated quotas.
- The majority of program breaks during children's blocks on the commercial free-to-air channels (79 per cent) are taken up by advertisements, the bulk of which are for toys.
- A large proportion of children find out about narrative programs by seeing them advertised on TV. However, there is limited opportunity or incentive for cross-promotion of children's programs to the child audience given factors such as the restriction on promotions during children's programming set out in the Children's Television Standards, the need for the commercial free-to-air networks to monetise programming through advertising, and their tendency to promote their strongest properties, which are often general-audience programs.

# Context

The delivery of quality children's programming is seen as essential to the cultural health and vitality of young Australians. This means ensuring they have access to a variety of television programs made specifically for them, including Australian programs.

The [Children's Television Standards 2009](#) (CTS), which provide the regulatory framework by which the commercial free-to-air networks are required to provide appropriate content for children, defines a children's program as one which:

- is made specifically for children or groups of children
- is entertaining
- is well produced using sufficient resources to ensure a high standard of script, cast direction, editing, shooting, sound and other production elements
- enhances a child's understanding and experience
- is appropriate for Australian children.

The commercial free-to-air broadcasters rely on a steady stream of first-release children's programs to meet government mandated content quotas, and children's content provides all broadcasters with the opportunity to connect the consumers of tomorrow to their brand. However it is also important that new children's programs continue to fill Australian screens to ensure that television continues to stimulate, educate and engage young audiences by enhancing their understanding and experience.

The CTS outlines the requirements relating to annual quotas, broadcast times for C (children's) and P (preschool) programs for the commercial free-to-air broadcasters, as well as restrictions on advertising and promotions within and around children's programming blocks. The table on the following page summarises some of the key requirements.

## *Children's Television Standards, key requirements*

	P Period	C Period
<b>Time-band</b>	Weekdays 07:00-16:30	Weekdays: 7:00 to 8:30am; 4:00pm to 8:30pm. Weekends: 7:00am to 8:30pm Either 30 minutes of C programs must be scheduled each weekday or at least 60 minutes on a minimum of two days per week (including weekdays and weekends).
<b>Hours</b>	130 hours annually (at least 30 continuous minutes every weekday) No quotas for first-release P programs	260 hours C material annually (including 130 hours first-release Australian children's) 25 hours of Australian first-release children's drama annually (totalling 96 hours over three years).
<b>Program breaks</b>	No breaks are allowed during P programs	Each 30 minutes of a C period may contain no more than 7 minutes (6.5 minutes for Australian C drama) of suitable advertisements, program promotions, station identifications and G classified community service announcements.
<b>Advertisements</b>	No advertising is allowed during P programs	Five minutes of commercials permitted in every 30 minutes of C program material. Only G classified advertisements. Advertising alcoholic drinks prohibited. The same commercial can only be broadcast twice during a 30 minute period. Other material such as prizes, competitions, promotions and endorsements by popular characters also face restrictions
<b>Promotions</b>	No promotions allowed during P programs	No more than one minute of G classified program promotions and station identifications in each 30 minutes. Only C, P and G programs and coverage of suitable sports events may be promoted during breaks immediately before, during or immediately after C and P programs. At least two on-air promotions notifying of schedule variations and rescheduling details must be broadcast. At least one must occur at a time when both children and their parents or carers are likely to be watching television together. The other must occur immediately before, during or immediately after the originally scheduled broadcast time.

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# PROGRAMMING STRATEGIES

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Marketplace differences between subscription, commercial free-to-air and public broadcasters have a significant impact on the children's strategies adopted by each network.

As general-content providers, the commercial free-to-air broadcasters need to allocate children's programs within a broad schedule of mixed program types. They need to balance their need to sell advertising by targeting the viewers most important to advertisers with requirements to schedule minimum levels of children's content, including Australian content quotas.

The 'pay to view' model adopted by subscription channels must also be supplemented by offering on-air advertising opportunities. While overall market penetration of subscription channels is only around 30 per cent of Australian households, it has allowed for the creation of a series of dedicated children's channels. These channels are able to broadcast to young viewers 24 hours a day, seven days a week but with only a certain percentage of first-release content at their disposal.

An expanded free-to-air broadcast platform has enabled the ABC to create both a dedicated children's channel and to program an all-day block of preschool content. However much like the subscription platform, a limited amount of first-release content is available for broadcast.

In order to better understand the strategies behind scheduling children's content on Australian television, on-air schedules were analysed for the commercial free-to-air networks, the ABC, and the dedicated children's subscription channels Nickelodeon, Cartoon Network and Disney Channel.

The initial analysis was undertaken in October 2012. However, on 30 November 2012 the Australian Government announced changes to Australian content requirements for the commercial free-to-air networks as part of its initial response to the Convergence Review. These changes included allowing children's programs aired on the multi-channels from 1 January 2013 to count towards sub-quota requirements set out in the *Children's Television Standards*. References to broadcast schedules from early 2013 are therefore also included.

# Commercial free-to-air broadcasters

## Overview

The *Children's Television Standards (CTS)* require the commercial free-to-air networks to broadcast at least 260 hours of C (children's) material and at least 130 hours of P (pre-school) material annually. The *Australian Content Standard* places additional requirements on the programs that are used to make up these C and P requirements – all of the 130 hours of P material must be Australian, and at least half of the 260 hours of C material must be first-release Australian programs, with at least 25 hours of first-release Australian C drama, and at least 8 hours of repeat C drama.

To qualify as P or C material, programs need to be submitted to the ACMA and assessed as suitable, and must be broadcast within stipulated time bands. The networks may also screen children's programs that have not been classified as P or C material, but these programs (often foreign-produced) do not count towards the mandated annual quotas.

The analysis in this report covers both P and C material and other children's programs.

Children's programs vary in duration but generally don't exceed 30 minutes. Prior to the 2009 *CTS* review, the commercial free-to-air broadcasters were required to schedule a minimum of 30 minutes of P material and 30 minutes of C material each weekday on their main channels. The review retained the weekday requirement for P material, but introduced an alternative option for C material of at least 60 minutes on a minimum of two days per week, including weekdays and weekends. Block programming has the potential to create destinations where viewers can consistently find programming for children, and also maximise opportunities for advertising.

In October 2012, all three networks had maintained 30 minutes of P material and 30 minutes of C material each weekday on their main channels, with longer blocks of C material on the weekends. However, the weekend blocks, which contained much of the first-release Australian content required under the *Australian Content Standard*, were often subject to shifts and cancellations to accommodate live sport broadcasts.

The majority of the networks' foreign-produced children's programs had been moved from the main channels to the digital multi-channels, and therefore were not used towards meeting the mandated quotas. During the analysed period, the Seven Network featured children's programs on both of its digital multi-channels, 7TWO and 7mate; Nine included children's content on GO!; and Network Ten on Eleven.

The multi-channel environment has allowed broadcasters to schedule longer and more consistent children's programming blocks. Many blocks were created to house programs acquired through international output deals, which were previously screened on the main channels. Several featured branding: either brand sponsorship through naming of the block; or channel branding, with features such as segments hosted by young Australian personalities, and audience engagement through games, skits, competitions and social media. Australian content on the multi-channels during October was limited to a small number of repeat screenings.

However, on 30 November 2012 the Australian Government announced changes to Australian content requirements for the commercial free-to-air networks as part of its initial response to the Convergence Review. These changes, which have since been legislated with the passing of the *Broadcasting Legislation Amendment (Convergence Review and Other Measures) Bill* in March 2013, included allowing children's programs aired on the multi-channels from 1 January 2013 to count towards the Australian content requirements set out

in the *Australian Content Standard*. While this analysis is based on October 2012, network schedules in February 2013 showed that both Seven and Nine had moved a proportion of their regularly scheduled Australian C and P material across to the multi-channels, most likely in response to the changes in legislation.

Other observations from October include evidence of networks scheduling competitively on their main channels. The designated time bands outlined in the *CTS* combined with the likely availability of the child audience has made it common for some children's programs to be scheduled against each other. However programming decisions have gone further, with like programs often scheduled against each other. Competitive programming can offer the viewer choice and promote healthy competition amongst content producers and broadcasters. However it also means that the viewer may miss out on one or more of the options.

October schedules also showed that a proportion of foreign-produced children's programming was scheduled by networks during the low-rating early morning period (prior to the commencement of the official C time band), on both the main channels and the multi-channels.

## Weekday scheduling trends

In accordance with the *CTS*, the networks each scheduled 30 minutes of first-release P programs on their main channels during October. Ten preferred the morning period, while Seven and Nine competed against each other at 3:30pm.

All three networks also scheduled 30 minutes of first-release Australian C programs at 4pm weekdays on the main channels. Seven and Nine's schedules were strictly educational, with new episodes of game shows *It's Academic* and *Kitchen Whiz* broadcast five days a week, directly after their preschool offering. Ten's strategy saw an assortment of Australian series (including drama and non-drama) assigned to different days throughout the week.

Main channel schedules for the October school holiday period showed little variation to weekday scheduling during the rest of the month, although the total time allocated by Seven to C content was higher during the holidays than the subsequent term time.

Weekday children's blocks on the multi-channels were predominantly scheduled in the morning for two or more hours. GO! provided the largest offering, with long blocks from 5am to 10am, and an additional two-hour afternoon block, as well as regular Friday evening family films.

The majority of multi-channel programs scheduled during October were foreign. 7TWO focused on girl-skewed first-release and repeat programs acquired through its output deal with Disney, which was sponsored by the children's magazine *Total Girl*. The children's magazine *Kzone* sponsored the equivalent block on 7mate, which focused on first-release and repeat screenings of boy-skewed Disney titles. Children's programs on Eleven were packaged under the *Toasted TV* branding, with hosted interstitials throughout. The morning and afternoon blocks on GO! focused on programs from the Warner Bros output deal, and the afternoon block incorporated the 30-minute hosted *Kids on WB* branded segment at 4pm.

Some repeat screenings of Australian children's drama programs were also scheduled during October, including *The Fairies* on 7TWO and *Dex Hamilton: Alien Entomologist* and *Pearlie* on Eleven.

Non-Australian films for children and families scheduled at 6.30pm on Friday evenings on GO! included titles such as *Honey I Blew up the Kids* and *Where the Wild Things Are*. GO! was also the only free-to-air network to regularly schedule daytime children's movies during the school holiday period (made-for-TV *Scooby-Doo* movies).

## Weekend scheduling trends

The multi-channel environment has enabled broadcasters to schedule longer and more consistent weekend blocks than on the main channels.

All three main channels scheduled blocks of children's programs on Saturday and Sunday mornings, of around one to two hours. Seven and Nine mainly used these slots to program foreign animated programs acquired through output deals – Seven's with Disney and Nine's with Warner Bros. After its hour on the main channel, Seven continued its *Saturday Disney* programming for another two hours on 7TWO.

Weekends were the preferred time for the main channels to schedule their required Australian C drama. Seven and Nine both screened Australian programs during late morning or afternoon slots. Titles screened during October included first-release episodes of *The Woodlies* and *Ghosts of Time* on Seven, and first-release episodes of *Dogstar* and repeats of *Lockie Leonard* and *Stormworld* on Nine. However both networks' commitments to live sport often resulted in interrupted or inconsistent scheduling of Australian programs, with start times often varying across the month.

During the analysed period, Ten was the only main channel with consistent weekend children's scheduling. Ten's programming strategy included a Saturday block from 7am to 9:30am featuring episodes of Australian series such as *Totally Wild*, *Scope*, *Me and My Monsters*, *K9* and the New Zealand series *Paradise Cafe*. *Totally Wild* was also scheduled in a one-hour block on Sunday mornings from 7am to 8am.

Throughout October, Seven and Nine regularly scheduled non-Australian Saturday evening films for children and families, although Nine's commitments to sport restricted their family films to only half the Saturday evenings in October. Titles included *Madagascar: Escape 2 Africa* and *Toy Story* on Seven and *Alvin and the Chipmunks: The Squeakquel* on Nine.

Weekend schedules on the multi-channels did not vary greatly from weekdays for the most part. Morning blocks continued on 7TWO and Eleven. GO! scheduled long children's blocks of six or more hours on Saturdays and Sundays, as well as Saturday evening family films. No regular weekend children's blocks were scheduled on 7mate during October. However, family films were occasionally scheduled.

Again, most titles screened on the multi-channels were foreign-produced, but the occasional repeat of an Australian series also featured.



**Commercial free-to-air broadcasters: children's programming overview**

N'WORK	PERIOD	TIME	CHILDREN'S BLOCK DESCRIPTION	ORIGIN: AUS/FOREIGN
Seven	Weekdays	15:30-16:30	Preschool; Education/Game shows.	Australian
	Weekends	Sat		Mostly foreign
		06:00-07:00	Saturday Disney.	Australian
		11:00-13:00	Animation.	Foreign
		18:30-20:30	Kids/family movies.	
Sun	06:00-07:00	Animation.	Foreign	
7TWO	Weekdays	06:30-09:00	Total Girl sponsored Disney block - mostly live action.	Mostly foreign
	Weekends	Sat 07:00-09:00	Saturday Disney.	Mostly foreign
7mate	Weekdays	06:30-09:00	Kzone sponsored Disney block - animation and live action drama.	Foreign
Nine	Weekdays	15:30-16:30	Preschool; Game shows/education.	Australian
	Weekends	Sat		Foreign
		06:00-07:00	Animation.	Australian/foreign
		11:00-13:00	Kids on WB block – animation.	Foreign
		19:30-21:30	Kids/family movies.	
Sun	06:00-07:00	Animation.	Foreign	
		11:30-13:00	Animation and live action.	Australian/foreign
GO!	Weekdays	05:00-10:00	Mostly animation.	Foreign
		14:30-16:30	Kids on WB runs 16:00-16:30 – mostly animation.	
		18:00-20:00	Kids/family movies.	
	Weekends	Sat	Kids on WB runs 07:00-11:00 – mostly animation.	Foreign
		04:45-11:00	animation.	
		19:30-21:30	Kids/family movies	
Sun	04:45-12:30	Kids on WB runs 07:00-11:00 –mostly animation.	Foreign	
Ten	Weekdays	08:30-09:00	Preschool.	Australian
		16:00-16:30	Education and drama programs.	
	Weekends	Sat	Live action educational and drama.	Australian
		07:00-09:30		
Eleven	Weekdays	06:00-09:00	Toasted TV block - mostly animation.	Mostly foreign
	Weekends	Sat	Toasted TV block - mostly animation.	Mostly foreign
		06:00-07:00		
	Sun	06:00-09:00		

## *Lockie Leonard and The Woodlies*

The impact of network scheduling decisions on the performance of Australian children's drama is illustrated by examining the release of the series *Lockie Leonard: Series 2* and *The Woodlies*.

*Lockie Leonard* is an Australian live action children's television series adapted from a series of books by award-winning author Tim Winton. The series first screened on the Nine Network in 2007.

The first 13 episodes of the 26-part series went to air on Saturdays between August and November 2010, any time between 11:00 and 13:00 – outside of the traditional morning peak. On occasion, episodes would air at different times in individual markets or were scheduled back to back. Viewers then had to wait more than six months for the final 13 episodes, which did not premiere until June 2011. No episodes were made available on Nine's catch-up television service to assist viewers who missed an episode.

The series achieved an approximate national series average of 92,000. It premiered with over 100,000 viewers but the inconsistent scheduling saw audience numbers fluctuate each week with some of the later episodes broadcast in 2011 hovering around the 50,000 mark.<sup>1</sup>

The encore screening in 2012 was even more erratic as episodes were haphazardly scheduled on Saturdays and Sundays, placed at various times between 11:30 and 15:30.

Seven's scheduling of *The Woodlies*, a 26-episode animated series from Australian animation studio Flying Bark Productions, was slightly more consistent. The first 21 episodes were shown weekly on Saturdays, with all but two screening at 10:00; after a two-week break the final five were scheduled over four weeks at 11:00am. The series achieved an average national audience across the series of 97,000 viewers.

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<sup>1</sup> Source: First-release, OzTAM and RegTAM, 5-city metro and regional consolidated.

# ABC

## Overview

The launch of the multi-channels allowed the ABC to re-imagine its children's programming strategies by using its channel group to target children of different ages and increase its commitment to children's broadcasting. ABC3 was established as a designated children's channel, screening programs for school-aged children seven days a week from 6am until the channel close at 9pm, including premiere episodes of Australian children's programs. ABC3 has a commitment to broadcast 50 per cent of Australian content. ABC4Kids on ABC2 was established as the primary destination for preschool programs, screening from 6am to 7pm seven days a week and has a commitment to 25 per cent of Australian content.

## Weekday scheduling trends

During October 2012, a small weekday children's block remained on ABC's main channel from 3pm to 5pm, featuring programs for both younger (*Play School*) and older (*Naturally Sadie*) children.

With 13 broadcast hours of preschool content to fill each day, the majority of programs on ABC4Kids were either repeats of previously released series or foreign productions. Australian programs during October included *Dirtgirlworld*, *Blinky Bill*, *Play School*, *Five Minutes More* and *Justine Clarke: Songs to Make You Smile*. The animated version of internationally successful Australian preschool series *Bananas in Pyjamas* screened mornings and afternoons, seven days a week. First-release screenings during October included twice-daily episodes of both the long-running Australian preschool series *Play School* (9.30am and 4.30pm) and its spin-off series *Little Ted's Big Adventure*. The hosted block, *Giggle and Hoot*, featuring popular characters Jimmy Giggle and Hoot the Owl, was scheduled three times a day (mornings, afternoons and early evenings). Australian interstitials such as *Giggle Art* and Wiggles song clips were also used throughout the schedule.

ABC3 features the hosted block, Studio 3, weekdays at 6.30am, with a repeat at 1pm. Weekday mornings during the October school holiday period featured several series new to ABC3 that had previously screened on commercial free-to-air channels, including foreign-produced programs as well as Australian series such as *I Got a Rocket* and *Pixel Pinkie*. With the commercial broadcasters' weekday commitments to children's television generally concluded by 4.30pm, first-release programs were often scheduled from 5pm onwards on ABC3, such as the animated Australian animated series *Figaro Pho* and the Australian interstitial music program *Stay Tuned*.

## Weekend scheduling trends

Children's programs were broadcast on ABC's main channel on Sunday mornings from 6.30am to 9am in a block focusing on animated programs for young school-aged children.

Weekends on ABC4Kids were scheduled very similarly to weekdays, with many of the same Australian programs, including daily screenings of *Play School* and twice daily screenings of *Bananas in Pyjamas*.

On ABC3, first-release Australian content was scheduled across the weekend, with new episodes of documentary series *Bushwhacked!* at 5pm on Saturday afternoons. First-release foreign content also screened across the weekend, with Sunday afternoons featuring new episodes of series such as *The Little Prince*, *Shaun the Sheep*, *Fruits Basket* and *Ouran High School Host Club*.

ABC3 was also the sole free-to-air network to utilise the marathon or 'boxed set' programming technique, in which multiple episodes of the same series (or themed program) are scheduled back to back. Marathon blocks of the foreign produced animated series *Total Drama Island* were broadcast from 11.45am to 1.45pm on Saturdays in October. (Longer marathon blocks were scheduled by ABC3 during weekdays over the summer school holiday period, outside the parameters of this analysis.)

**ABC: children's programming overview**

NETWORK	PERIOD	TIME	BLOCK DESCRIPTION	ORIGIN: AUS/OTHER
ABC1	Weekdays	10:00-11:00	Mostly educational series for both younger and older children. Live action and animation. Last 30 mins skews slightly older.	Australian/foreign
		15:00-17:00		
	Weekends	Sun 06:30-09:00	Animation.	Mostly foreign
ABC2	Seven days	06:00-19:00	Preschool, packaged as ABC4Kids on 2. Giggle and Hoot hosted blocks from 08:00-09:30, 13:30-15:00 and 18:00-19:00. Playschool daily on weekends and twice daily weekdays.	Australian/foreign
ABC3	Weekdays	06:00-21:00	Live action and animation throughout the day. 6:30-08:30 – Studio 3 hosted block 10:15-13:00 – factual entertainment focus	Australian/foreign
	Weekends	06:00-21:00	Live action and animation. Mini marathon 11:45-13:45 Sat	Australian/foreign

### *Dance Academy Series 2*

The weekday evening release of *Dance Academy series 2* on the dedicated children's channel ABC3 highlights the positive impact network scheduling decisions can have on the performance of Australian children's drama.

*Dance Academy* is a teen-oriented Australian television drama which first screened in 2010, with series 2 airing in 2012.

The 26-part series premiered in March 2012. It was scheduled Monday to Thursday at 18:30, the early evening timeslot offering children both the opportunity to choose a local kids-skewed program during weekday evenings (instead of the commercial broadcasters news and current affairs offerings) and a rare opportunity to view the series with their family. It was one of the highest-rating children's programs of 2012, achieving an average national audience of 177,000 across the 26 episodes.

*Dance Academy* was also popular on catch-up television, with the premiere episode of series 2 attracting 1.8 million program plays via iView and the ABC3 Watch Now website.

# Subscription channels

## Overview

All three of the dedicated children's subscription channels have set up separate channels for preschool programming – Nick Jr, Disney Junior and Boomerang – while the main channels focus on programs for children aged five to 12.

Almost all the programs broadcast during October were foreign-produced live action or animation series, many targeting either boys or girls. Only one Australian program was identified on the subscription channels during October: a repeat screening of *H2O: Just Add Water* on the Disney Channel.

While it can be difficult to identify all first-release content on the subscription channels, release patterns during October 2012 tended to vary by channel and title. The majority of new episodes seemed to fall during weekday afternoons and weekend mornings. New weekday episodes were generally released one episode per week, allowing for a variety of programs to feature across the timeslot. Although the weekday format allows for programs to be featured up to five times a week, in October this practice was only used by channels to schedule repeat screenings. Across the weekend, first-release episodes were mostly scheduled early to mid morning.

Channels frequently split first-release series into smaller batches for release, highlighting the importance placed on new episodes of a strong property. While some series were split in two, as few as four new episodes could be rolled out over a month (often in conjunction with marketing campaigns or on-air promotion) and the remainder held for later release. Some new episodes were timed to coincide with the school holiday period.

Repeat strategies varied by channel and title. In some cases second screenings were scheduled within a week of initial broadcast, serving as a catch-up opportunity, while others were delayed – perhaps to build demand among viewers.

Marathon blocks are often used strategically during school holidays by the subscription children's channels. Cartoon Network was the only channel to adopt this strategy during the analysed period.

Children's movies screened during evenings across all three channels on various days from Friday to Sunday in October. While theatrical films were occasionally scheduled, the majority were repeats of popular made-for-television movies, including standalone telemovies and feature-length extensions of popular series.

Channels frequently scheduled similar animated programs at the same time as their competitors: the 4pm weekday timeslot saw *Adventure Time* (Cartoon Network), *Scaredy Squirrel* (Disney Channel) and *SpongeBob Squarepants* (Nickelodeon), scheduled against each other; while 9am Saturdays saw *The Amazing World of Gumball* (Cartoon Network), *Gravity Falls* (Disney Channel) and *SpongeBob Squarepants* (Nickelodeon) in direct competition.

## Cartoon Network

Cartoon Network's October schedule had a strong comedy emphasis. The programming generally skewed more toward boys, with its focus on animation ranging from comedies such as *Scooby-Doo* for younger children to action and adventure series such as *Ben 10* for older children.

No Australian content screened on Cartoon Network during October. The channel's first locally produced animated special, *Exchange Student Zero*, premiered in December 2012, outside the analysed period.

### Weekdays

Weekdays comprised repeat screenings; no first-release content was identified during October. A marathon block of the animated comedy series *Adventure Time* was scheduled from 5am to 11pm across the Monday public holiday.

### Weekends

First-release episodes were mainly scheduled across weekend mornings, such as the Sunday morning screenings of *Ben 10: Omniverse* and *Scooby-Doo! Mystery Incorporated* across both Saturdays and Sundays. During programs with a strong boy skew such as *Ben 10: Omniverse*, a girl-skewed program was often scheduled on Boomerang (*Care Bears: Adventures in Care-A-Lot*). Children's movies scheduled on Saturday evenings included *Scooby-Doo* and *Pokemon* telemovies as well as the theatrically released film *Zathura: A Space Adventure*.

## Disney Channel

While the Disney Channel's slate offered a variety of programs for children of all ages and both genders, the popularity of its girl-targeted series generally ensured a skew towards girls.

A repeat screening of *H2O: Just Add Water* was the only Australian program identified during October survey period.

No marathon blocks were scheduled on Disney during the survey period, including the October school holidays. However, back-to-back episodes of *H2O: Just Add Water* were shown between 9am and 6.30pm on the 2013 Australia Day public holiday.

### Weekdays

New episodes of foreign-produced series were scheduled on weekday afternoons, sometimes paired with a repeat. Some new episodes were repeated within a week, while others were not repeated for several months (such as *My Babysitter's A Vampire*). Disney films were scheduled on Friday and Saturday evenings and featured the premiere of the standalone Disney Channel Original Movie (DCOM) *Girl vs. Monster*. Repeat screenings of DCOM movies based on existing series such as *Wizards of Waverly Place*, as well as other standalone telemovies, were also scheduled.

### Weekends

First-release episodes were scheduled on Sunday mornings (*Lucky Fred*) and Saturday evenings at 6.30pm (*Good Luck Charlie*).

## Nickelodeon

Like Cartoon Network, no Australian content was screened on Nickelodeon during October. However, several domestic initiatives fell outside the October period: channel premiere episodes of the Australian free-to-air series *Lightning Point* were scheduled on Saturdays at

5.30pm up to the September week of the school holiday period; new episodes of the channel's long-running Australian children's reality series *Camp Orange* are scheduled mid-2013; and the globally successful *US Kids Choice Awards*, broadcast early each year, allows Australian children to vote online for a number of 'Australia's favourite' categories.

#### *Weekdays*

Episodes of the long-running series *SpongeBob Squarepants* screened on Nickelodeon five days a week in blocks from 7am to 8:30am and 4pm to 5pm.

New-release content was scheduled on Monday afternoons during October, with varying strategies adopted. The first six episodes of *The Legend of Korra*, a spin-off of the popular series *Avatar: The Last Airbender*, screened during the October school holidays, with the remaining six episodes held over until early December. *Teenage Mutant Ninja Turtles* took over the Monday timeslot at the start of term time and was encored twice within the same week.

Repeat screenings of Nickelodeon original movies were scheduled at midday during the school holiday period.

#### *Weekends*

Movies on Nickelodeon were scheduled on Sunday evenings, repeated on Wednesdays at 5pm. Short marathon blocks of no more than two hours were occasionally scheduled across the weekend.

#### **Subscription channels: children's programming overview**

NETWORK	PERIOD	TIME	BLOCK DESCRIPTION	ORIGIN: AUS/OTHER
Cartoon Network	Weekdays	All day	Almost all animation.	Foreign
	Weekends	All day	Almost all animation. Movies screen Saturdays at 18:00 and 21:30.	Foreign
Disney Channel	Weekdays	All day	Live action and animation. 14:30-17:30 mostly animation, then mostly live action. Movies screen 18:30 Friday.	Foreign (one Australian series)
	Weekends	All day	Mix of live action and animation. Mostly live action. Movies screen 19:30 Saturdays.	Foreign (one Australian series)
Nickelodeon	Weekdays	All day	Mix of live action and animation; mostly live action from 17:00-21:15.	Foreign
	Weekends	Sat All day	Mostly animation until 09:30 then mostly live action.	Foreign
		Sun All day	Live action and animation. Mostly live action from 12:00-20:30. Movies screen 18:00 Sundays.	

### *Conspiracy 365*

With a business model not solely reliant on advertising dollars, subscription television enables a release to be more flexible and tailored to the individual production.

*Conspiracy 365*, an Australian drama series based on the popular children's book series by author Gabrielle Lord, was produced exclusively for release by the Family Movie Channel (FMC). Though not a dedicated children's channel, the youth-targeted FMC was a good fit for the unique release strategy required for the production.

Episodes of this 12-part action adventure series were scheduled at 7:30pm on the first Saturday of every month, matching the time period covered in the plot of each episode. Episodes were then made available to download on iTunes or BigPond the following day and several encore screenings were scheduled throughout the month. The series was supported by an interactive website with games, puzzles, photographs, behind the scene photographs and information, messages and videos from the characters, all of which helped to keep viewers engaged in between first-release episodes.

### International telemovies: *High School Musical*

Although the high cost of drama production in Australia continues to limit opportunities to produce local children's telemovies, internationally produced titles with global appeal are frequently scheduled by the dedicated children's subscription channels in Australia.

The *High School Musical* franchise remains one of the most globally successful telemovies for children. Released in 2006, *High School Musical* became the most successful film ever produced by the Disney Channel. It generated two sequels, *High School Musical 2*, which premiered to over 17 million viewers in the US and *High School Musical 3: Senior Year*, which was released theatrically, earning over \$252 million worldwide. The three films generated countless merchandising opportunities and launched the careers of their young cast, elevating them to teen idol status. The subsequent production of several series that focused on characters that perform highlights the influence the franchise had on the commissioning strategies of the dedicated children's channels in the years ahead.

### Methodology

This publication reports on the on-air schedules of both the free-to-air network's dedicated to broadcasting children's content and the three main subscription children's channels (Disney Channel, Nickelodeon and Cartoon Network).

Only the networks that broadcast regular children's content were analysed. Gem, One, SBS One and SBS Two do not broadcast regularly scheduled children's content and have therefore been excluded.

Sources of information for network programming strategies: TV guides, online websites, OZTAM data, viewed content and general desktop research.

October 2012 was selected as the focus period as it began with the tail end of a school holiday period which allowed for comparison with each networks regular term-time children's schedules.



# ADVERTISEMENTS AND PROMOS

To gain insight into the ways in which commercial free-to-air networks promote children's programs, the content of commercial breaks broadcast during children's programming blocks was monitored across a week in November 2012.

The number of breaks and spots scheduled during children's programs varied, depending on the network, channel, timing and duration of the programming block. But with the exception of Australian preschool programs - which were broadcast commercial-free on the main channels - all networks used program breaks to broadcast a combination of advertisements and promotions for either the network or for other programs.

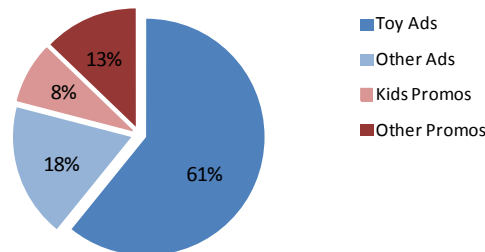
The scheduling of advertisements and promotions by broadcasters during children's programming blocks is in part dictated by the requirements outlined in the CTS.

## Overview

Across all the children's programming blocks (main channels and multi-channels), 79 per cent of all spots available during commercial breaks were dedicated to advertisements and 21 per cent to promotions (either for content or the network).

Many of the trends around advertising and promotions during children's programs mirror those adopted by the networks in general, and were not unique to the scheduling of children's content.

### *Breakdown of advertisements and promos during regularly scheduled children's blocks*



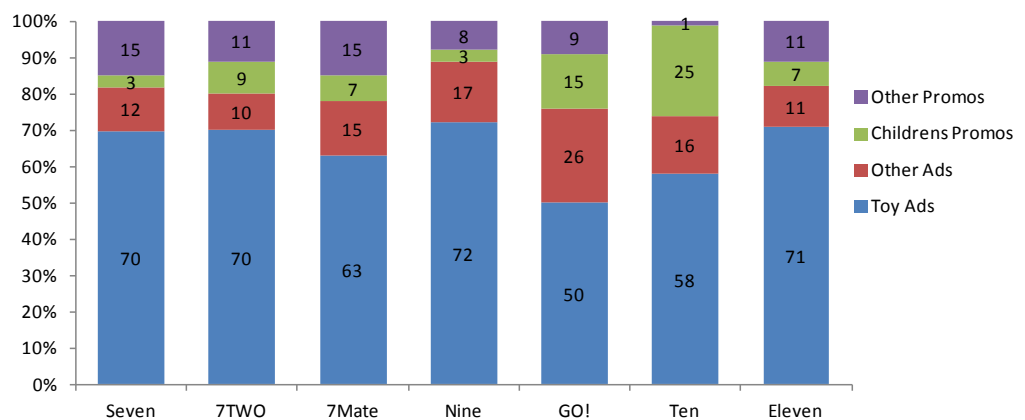
#### Useful definitions

**Spots:** Individual pieces of content broadcast during program breaks on television.

**Advertisements:** Television programming produced and paid for by an organisation, which conveys a message, typically to market a product or service.

**Network promotions (promos):** Television programming produced to market television programs unique to that network or to market the network itself.

### *Breakdown of advertisements and promos during children's blocks, by channel*



## Advertisements

By far the most common use of commercial breaks was advertisements for toys. They made up 61 per cent of all spots, and 77 per cent of all advertisements. This suggests that the linking of the target market to the advertised product is just as important during children's content as it is during the rest of the network's schedule.

Other advertisements included products for children, such as magazines, films, theatre and products with a child-skewed tie-in. For example, *Boost Juice* had a cross promotion with the children's film *Ice Age: Continental Drift*, and a soccer-playing monster helped *Mamee*<sup>2</sup> snack foods highlight their 'amber compliant'<sup>3</sup> range of snacks which are sold in schools.

However a significant proportion of 'other' advertisements were for adult-targeted products - such as cars, insurance, outdoor furniture and community organisations - particularly on the multi-channels. Strengthening audiences for the multi-channels have provided more air-time for advertisers to expand campaigns from the main channels, as well as to test the waters for other products at reduced rates and risk.

## Promotions

Network promotions are used as on-air marketing for either a networks programs or the network itself. They reduce advertising fatigue and channel switchover/switch-off during commercial breaks, generally top and tailing the break to signal the suspension and recommencement of the program and ease the transition from one program to the next.

During the analysed period, 21 per cent of spots during children's blocks were allocated to promotions. The majority were used to support the network's strongest properties, rather than specifically promoting other children's programs in the network's schedule. Only 8 per cent of total spots (40 per cent of total promotions) were used to promote children's content. Most were used to support either brand-sponsored content blocks or the network's slate of prime-time family/kid skewed feature films, rather than individual children's programs.

The main channels for the Seven and Nine networks were least likely to allocate spots to promos for children's programs (3 per cent of all spots each). Larger proportions of children's promos were broadcast on the multi-channels, 7TWO, 7Mate and GO! Network Ten was the exception, where 96 per cent of all promos were used to support its slate of Australian children's television series (including eight promos for drama series *Lightning Point*).

Fewer promos were scheduled during Australian produced series, with networks preferring to maximise advertising opportunities.

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<sup>2</sup> To limit the amount of unhealthy food that can be purchased in school canteens and increase healthier options, the Australian Government has classified food and drink products according to their nutritional value per portion size. AMBER foods are mainly processed foods with sugar, salt or fat added but some nutritional value. When eaten occasionally, they are a suitable snack.

## Breakdown by network

### NETWORK SEVEN (GROUP)

	Seven	%	7TWO	%	7mate	%
Toy Ads	166	70	447	70	386	63
Other Ads	29	12	62	10	77	15
Kids Promos	7	3	55	9	45	7
Other Promos	36	15	69	11	79	15
<b>Total</b>	<b>238</b>		<b>633</b>		<b>587</b>	

### SEVEN – MAIN CHANNEL

#### Weekday programming strategies

- 15:30 to 16:00 – preschool programs (ad-free)
- 16:00 to 16:30 – Australian game show style programs

#### Weekend programming strategies

- Sat/Sun - 06:00 to 07:00 – *Disney* block (Saturday block branded as *Saturday Disney*)
- Sat - 11:00 to 13:00 – Australian animation and game show style programs.

#### Key findings

- 82 per cent of spots were used for advertising and 18 per cent for promos.
- Weekend blocks were still dominated by toy ads, but included a greater range of other products.
- Breaks featured minimal mid-program promotion – most were channel branding.
- 3 per cent of spots (16 per cent of promos) were used to promote children's programs (*Saturday Disney, Up*).
- Other promos related to programs such as *Home and Away, The X-Factor, Border Security, Airways* and features such as *Quantum of Solace*.

### 7TWO

#### Weekday programming strategies

- 06:30 to 09:00 – *Total Girl* sponsored block, featuring predominately Disney content

#### Weekend programming strategies

- Sat - 07:00 to 09:00 – *Saturday Disney* block

#### Key findings

- 80 per cent of spots were used for advertising and 20 per cent for promos.
- 88 per cent of all advertisements during children's blocks were for toys.
- Only two hours of children's programming was scheduled on the weekend allowing limited opportunities for advertisements.
- The majority of breaks featured program promotion. Channel branding was kept to a minimum but occasionally used as a lead in to a block or program.
- 9 per cent of spots (44 per cent of promos) were used to promote children's programs (*Saturday Disney, Finding Nemo, Cheaper By the Dozen 2*).
- Several promos were for series exclusive to 7TWO (*Doc Martin, Dynamo*), however the majority were for Seven's slate (*Home and Away, The X-Factor, Once Upon A Time, Motorway Patrol, Beauty and the Geek*).

## 7MATE

### *Weekday programming strategies*

- 06:30 to 09:00 – Kzone sponsored block, featuring predominately Disney content

### *Key findings*

- 78 per cent of spots were used for advertising and 22 per cent for promos.
- 79 per cent of all advertisements during children's blocks were for toys.
- With no regular children's blocks scheduled on weekends, all advertisements and promotions occurred during weekdays.
- Most breaks featured either program promotion or channel branding.
- 7 per cent of spots (36 per cent of promos) promoted children's programs or blocks such as the *Saturday Disney* and *Total Girl (7TWO)*, *A Christmas Carol (Seven)*, *Cheaper By the Dozen 2*, *The Shaggy Dog* and the telemovie *Camp Rock 2 (7mate)*.
- Several promos featured series exclusive to 7mate (*Turtle Man*, *Swamp People*), however most were for Seven programs (*The X-Factor*, *Once Upon A Time*, *Deal or No Deal*, *V8 Supercars*, *GoldenEye*, *The Bourne Identity*).

## NETWORK NINE (GROUP)

	Nine	%	GO!	%
Toy Ads	231	72	985	50
Other Ads	54	17	525	26
Kids Promos	10	3	296	15
Other Promos	27	8	180	9
Total	322		1,986	

## NINE – MAIN CHANNEL

### *Weekday programming strategies*

- 15:30 to 16:00 – preschool programs (ad-free)
- 16:00 to 16:30 – Australian educational/game show style programs

### *Weekend programming strategies*

- Sat/Sun - 06:00 to 07:00 – foreign animated series
- Sat - 10:00 to 12:00 – a mix of Australian and foreign animation series
- Sun - 11:30 to 14:00 – a mix of Australian animation and live action drama

### *Key findings*

- 89 per cent of spots were used for advertising and 11 per cent for promos.
- Weekend blocks were still dominated by toy ads, but included a greater range of other products.
- No mid-program promotion featured during weekdays and it was minimal across the weekend. However channel branding was used to lead into most programs.
- 3 per cent of spots (27 per cent of promos) were used to promote children's programs. Almost half of these were dedicated to advising children of scheduling changes as they are required to do by the CTS.
- Other promos related to prime time programs such as *Australia's Funniest Home Videos*, *The Women's Weekly Summer Edition* and *Test Cricket*.

**GO!***Weekday programming strategies*

- 05:00 to 10:00 – foreign animation and live action
- 14:30 to 17:00 – foreign animation and live action (16:00-16:30 featured Kids on WB hostings)

*Weekend programming strategies*

- Sat - 04:30 to 10:30 – foreign animation
- Sun - 04:30 to 12:30 – foreign animation (07:00-11:00 featured Kids on WB hostings)

*Key findings*

- 76 per cent of spots were used for advertising and 24 per cent for promos
- Only 65 per cent of all advertisements were for toys, indicating greater variety than competitor channels.
- Only 15 per cent of advertisements appeared on weekends.
- The majority of breaks featured program promotion and/or channel branding. Promotion was less frequent on Sunday.
- 15 per cent of spots (38 per cent of promos) promoted children's programs including feature films (*Open Season, Madagascar, Flubber*). Significant air time was devoted to promoting children's films as a whole. 'GO! Movies' rotated five short promos throughout the schedule, each one focusing on a character from a children's film.
- Other promos supported adult targeted features (*Practical Magic, License to Wed*) or billboard style program guides. Priority promotion was given to GO!'s exclusive coverage of the *2012 ARIA Awards* which began at least four weeks prior to broadcast and increased in variety and intensity as the broadcast date approached.

**NETWORK TEN (GROUP)**

	Ten	%	Eleven	%
Toy Ads	127	58	594	71
Other Ads	34	16	88	11
Kids Promos	55	25	60	7
Other Promos	2	1	92	11
Total	218		834	

**TEN – MAIN CHANNEL***Weekday programming strategies*

- 08:30 to 09:00 – preschool programs (ad-free)
- 16:00 to 16:30 – mix of Australian drama and education programs

*Weekend programming strategies*

- Sat - 07:00 to 09:30 – mix of Australian education and drama programs
- Sun - 07:00 to 08:00 – mix of Australian education programs.

*Key findings*

- 74 per cent of spots were used for advertising and 26 per cent for promos.
- Only two mid-program breaks were scheduled per program compared with three breaks on competitor channels (including Eleven).
- Toy ads dominated weekend blocks but included a greater range of other products.

- Channel branding promos were not used; however program promotions featured during every break and as a lead in to programs.
- 25 per cent of spots (96 per cent of promos) were used to promote Ten's Australian children's slate: *Lightning Point*, *Wurrawhy*, *Steve Irwin's Wildlife Warrior's*, *Scope* and *Totally Wild*.
- Only two promos supported adult targeted programs (*Merlin*, *David Attenborough*).

## ELEVEN

### *Weekday programming strategies*

- 06:00 to 09:00 – Toasted TV branded and hosted block focusing on foreign animation series

### *Weekend programming strategies*

- Sat 06:00 to 07:00; Sun 06:00 to 09:00 - Toasted TV branded and hosted block focusing on foreign animation series

### *Key findings*

- 82 per cent of spots were used for advertising and 18 per cent for promos.
- Weekend blocks were still dominated by toy ads, but included a greater range of other products.
- The majority of breaks featured program promotion and/or channel branding.
- 7 per cent of spots (39 per cent of promos) were used to promote Ten's children's programs (*Scope*, *Lightning Point*, *Steve Irwin's Wildlife Warriors* and *Totally Wild*).
- Other promos supported series exclusive to Eleven (*So You Think You Can Dance US*); however the majority were for Ten's prime time offerings (*Glee*, *American Idol*, *MasterChef Australia*, *The Simpsons* and *Merlin*).

## **Methodology**

To ensure that the week monitored best represented a typical week of children's scheduling, dates featuring network commitments to live events were eliminated. The week monitored therefore is not made up of seven consecutive dates but include November 5, 16-18, 20-21 and 29.

Only the commercial channels that broadcast regular children's content were monitored, therefore Gem, One, SBS One and SBS Two have been excluded.

Only regularly scheduled blocks containing children's television series were monitored. Blocks featuring children's films were excluded.

Channel branding promos and billboard style program guides were assigned as 'other promos'.