



Media Ownership: Children's TV channels in Europe - Who are the key players?

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Laura Ene





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Introduction

The contemporary television landscape in Europe faces deep changes regarding children's programming offering in terms of both content and packaging. The evolution of the latter in recent years has changed the perspective of the main players in this market. If children's TV programming was mainly the prerogative of generalist TV stations, the current market realities show that the standalone specialised children's channels are challenging them.

Children's content is therefore shifting from dedicated programming blocks aired on generalist channels to being packaged and delivered through standalone customised children's channels. This trend is supported by the fact that in Europe generalist channels account for less than 5% of all animation broadcasts (including repeats)¹. By the same token, in Germany and Spain children's TV channels comprise about half of children's audiences². Digital television packages have boosted the number of dedicated children's TV channels, in particular those operated by private players.

The production of children's content once funded mainly by the Public Service Broadcasters (PSBs) is increasingly undertaken by children's TV channels. Even if the overall number of original productions available on the market has increased due to these channels, the share of local productions may be negatively impacted, as children's channels may favour acquired programming, often of US origin. This can be explained on the one hand by budgetary constraints and on the other by the lower market risk associated with broadcasting successful well-known productions already tested in other markets. The new market power of children's channels could therefore offer new outlets for the right holders, but also threaten the production of European original content.

There is however no unique formula applied by children's TV channels across Europe in terms of content offering, but rather a range of models influenced by the channels' overall market strategy and financing power, which are more often than not dependent on the type of ownership.

In view of all these changes, this report focuses on portraying the children's TV channels in terms of market offering, performance and major players.

¹ Source: Mapping the Animation Industry in Europe, European Audiovisual Observatory (2015)

² Source: Kids TV Report July - Consumption of kids' TV programmes: a shifting balance, Médiamétrie (December 2016)



Key findings

This report provides an analysis of the supply of children's TV channels in Europe, and their performance in terms of audiences and the main market players controlling them. The scope of the analysis is pan-European with specific focuses at country level.

The data related to the offering of children's TV channels in terms of establishment, availability and type of ownership is sourced from MAVISE, the database on TV and on-demand audiovisual services and companies in Europe managed by the European Audiovisual Observatory, while the datasets covering the audiences are provided by Eurodata TV Worldwide.

The supply of children's TV channels in Europe

- A total of 329 children's TV channels (including varying linguistic versions) are on offer in Europe, accounting for 6% of all national and international TV channels established in Europe. One children's TV network features on average 2.6 linguistic versions.
- Only 20% of the children's TV networks have multiple TV channels by linguistic version but they account for up to 70% of all children's TV channels in Europe.
- Just over half of the children's TV channels were established in the United Kingdom (56%). Other main countries of establishment are the Czech Republic (9%), Russia (7%), the Netherlands (6%), Italy (5%) and Germany (5%).
- The European audience can choose from an average selection of 23 children's channels per market. Naturally, small but multi-lingual markets such as Belgium (42 channels) and Switzerland (39 channels), as well as 'little brother' markets that share language affinities in the Baltics, such as Lithuania (36 channels) and Estonia (35 channels) or the small Adriatic countries like Croatia (34 channels) and Montenegro (34 channels), have a wider offering.

The market players for children's TV channels in Europe

- Around 85% of the children's TV networks in Europe are owned by the private sector, with roughly two out of three private networks of European origin.
- The quarter or so of all children's TV networks in Europe accounted for by the US private sector (33) nonetheless comprise around 70% of the total number of children's channels at the pan-European level (225) because each US children's network has an average of seven linguistic versions.
- Over 55% of US children's TV channels are licensed in the United Kingdom while the rest, amounting to 80% of the total number of children's TV channels in Europe, are concentrated in the Czech Republic (11%), the Netherlands (7%) and Italy (6%).



- The US children's TV channels are highly concentrated at the network and group level. At least one in two children's TV channels in Europe represents one of the top 10 US networks by number of channels (Nickelodeon; Disney Channel; Boomerang; Cartoon Network; JimJam; Nick Jr.; Disney Junior; Disney XD; Baby TV; Minimax) and is owned by one of the top four US groups (Walt Disney; Viacom; Time Warner; AMC).
- While Walt Disney, Viacom and Time Warner have a portfolio encompassing mainly US brands launched on the European market, AMC stands out with a fully European-branded children's TV channel portfolio.

Children's TV channel audiences in Europe

- At the pan-European level, the average yearly rating registered for children's TV channels was 0.8% in 2015, indicating under-performance in terms of consumption potential compared to supply share. In some markets, of course, children's channels are more popular than the average for e.g. Romania (1.7%), Portugal (1.2%) and Italy (1.1%) - and in some they fall below the average - for e.g. Latvia (0.1%), Switzerland (0.1%) and Estonia (0.2%).
- The average daily audience share for children's TV channels in Europe reached 5% in 2015. Markets such as Romania (7.5%), Italy (6.4%) and Hungary (6.3%) showed a higher preference for children's TV channels, while markets such as Slovakia (0.1%), Latvia (0.2%) and Switzerland (1%) indicated a greater popularity for other channel categories.
- The Top five markets in terms of ratings, namely Italy (16%), Russia (13%), Germany (12%), the United Kingdom (12%) and France (8%) accounted for 70% of the total number of rating points registered by children's TV channels in Europe. The top 10 children's TV channels accounted for more than a third of the total ratings recorded for children's channels at the pan-European level, while around 20% of the children's TV channels established in Europe comprised 70% of the ratings registered for all children's channels at the pan-European level.
- All of the top 10 children's TV channels in Europe - represented by Karusel, Kanal Disney, Super RTL, Clan, Ray Yoyo, Gulli, KiKA, Cbeebies, Boing and Disney Channel Spain offer free access in one of the top six markets by population, while half are national public channels.
- Accounting for only 6% of children's channels in Europe, the national public channels in 2015 captured a four-fold audience market share. Moreover, they held half of the top 10 children's TV channel ratings in Europe.
- The US children's TV channels on the other hand, accounting for 60% of the total children channels ratings in Europe, have built up their audiences by applying an 'extensive' rather than 'intensive' approach, and thus reach up to 23 markets with a diversified portfolio.
- The top eight US children's TV networks, encompassing over 80% of US ratings for children's channels, are: Disney Channel (27%); Nickelodeon (16%); Cartoon Network (10%); Disney Junior (8%); Boing (8%); Nick Jr. (5%); Boomerang (5%); and Cartoonito (3%).



- The top four pan-European US groups comprising over 90% of the US ratings for children's channels are: Walt Disney (39%); Time Warner (26%); Viacom (23%); and AMC (4%).

Focus on Walt Disney, Time Warner and AMC groups

- Several drivers explain why US groups have added the direct exploitation of children's channels to the licensing of rights: the opportunity to access a higher share of added value by bypassing the European TV channels; a large back catalogue of rights, in some cases fully amortised, and therefore a relatively low entry cost for the market; the possibility to develop a coherent, pan-European brand strategy.
- The groups mixed direct investments in new or existing businesses, with joint ventures and strategic partnerships, in their European expansion quest, in order to carry their brands across the European borders.
- Walt Disney and Viacom, established in up to 10 countries, have the most heterogeneous establishment structure, while Time Warner and AMC are licensed in six and seven licensing territories, respectively. The main licensing hubs for the top four US groups are the United Kingdom, the Czech Republic and the Netherlands.
- Walt Disney features an almost evenly developed range of linguistic versions for three of its networks; Time Warner and Viacom concentrate over 80% of their children's TV channels under two networks each; and AMC houses 60% of its channels portfolio under the JimJam network.
- Each group has in its portfolio at least one flagship network, such as Disney Channel, Cartoon Network, Nickelodeon or Minimax, addressing a mainstream children and youngsters segment. The groups also have at least one more network addressing pre-schoolers, such as Disney Junior, Cartoonito, Canal Panda and Jim Jam. Additionally there is also a tendency to launch and foster niche children's channels that are more action-adventure-oriented and skewed towards boys, such as Disney XD, Toonami, Nicktoons and Mexamax.
- Walt Disney, Viacom and AMC each have one flagship children's network which drives between 60% and 70% of their audience shares. Time Warner features a more balanced distribution of ratings across its networks: half of its brands are European and account for 44% of its audiences.
- The preschool pan-European networks Disney Junior and Nick Jr. capture one fifth of Walt Disney and Viacom audiences, respectively; JimJam and Canal Panda together make up one third of AMC's audiences; and just over 10% of Time Warner's rating points can be attributed to Cartoonito. It is important to note however that Cartoonito and Canal Panda are at most multi-country brands covering a maximum of two territories, as opposed to transnational brands.



Zusammenfassung der wichtigsten Erkenntnisse

Der vorliegende Bericht enthält eine Analyse des Angebots von Kinderfernsehsendern in Europa mit Angaben zu Reichweiten und den wichtigsten Akteuren. Die Analyse erfolgt auf gesamteuropäischer Ebene, wobei länderspezifische Besonderheiten berücksichtigt werden.

Die Daten zu den Kinderfernsehsendern betr. Sitz, Verfügbarkeit und Beteiligungsverhältnisse sind der MAVISE-Datenbank über Fernsehen und Anbieter audiovisueller Abrufdienste in Europa der Europäischen Audiovisuellen Informationsstelle entnommen; die Angaben zur Reichweite sind One-Television-Year-Daten und stammen von Eurodata TV Worldwide.

Das Angebot der Kinderfernsehanbieter in Europa

- In Europa werden 329 Fernsehsender für Kinder (einschl. sämtlicher Sprachfassungen) betrieben; das sind 6% sämtlicher in Europa niedergelassener nationaler und internationaler Fernsehkanäle. Im Durchschnitt bieten Kinderfernsehsender 2,6 Sprachfassungen an.
- Nur 20% der Kinderfernsehsender verfügen über mehrere Kanäle mit unterschiedlichen Sprachfassungen; sie stellen bis zu 70% des Angebots an Kinderfernsehen in Europa.
- Zwei von 5 Kindersendern haben ihren Sitz im Vereinigten Königreich. Andere wichtige Länder, in denen es Kindersender gibt, sind die Tschechische Republik (9%), Russland 7%, die Niederlande (6%), Italien (5%) und Deutschland (5%).
- Die Zuschauer in Europa können in ihrem jeweiligen Land aus einem Angebot aus durchschnittlich 23 Kindersendern wählen. Ein noch größeres Angebot besteht in kleinen, vielsprachigen Märkten wie Belgien (42) oder der Schweiz (39) sowie in kleinen Märkten mit sprachlichen Affinitäten im Baltikum wie Litauen (36) und Estland (35) oder in den kleinen Adrialändern Kroatien (34) und Montenegro (34).

Die Anbieter von Kinderfernsehen in Europa

- Ungefähr 85% der europäischen Gruppierungen von Kindersendern sind Privatsender, wobei 2 von 3 privaten Sendergruppen europäischen Ursprungs sind.
- Obwohl nur ca. ein Viertel sämtlicher Gruppierungen von Kindersendern in Europa (33) Unternehmen des US-amerikanischen Privatsektors sind, stellen sie ungefähr 70% des Gesamtangebots an Kinderkanälen (225) auf gesamteuropäischer Ebene, weil sie ihre Programme durchschnittlich in 7 Sprachfassungen verbreiten.



- Über 55% der US-amerikanischen Kindersender verfügen über eine Lizenz im Vereinigten Königreich, während bei den übrigen 80% aller in Europa tätigen Kindersendern eine Konzentration auf die Tschechische Republik (11%), die Niederlande (7%) und Italien (6%) festzustellen ist.
- Die Kindersender US-amerikanischer Gruppierungen bzw. Konzerne weisen einen hohen Konzentrationsgrad auf. Gemessen an der Anzahl der Kanäle gehört mindestens jeder zweite Kinderkanal einer der 10 großen US-Sendergruppierungen an (Nickelodeon, Disney Channel, Boomerang, Cartoon Network, JimJam, Nick Jr., Disney Junior, Disney XD, Baby TV, Minimax) bzw. ist im Besitz einer der vier großen US-Konzerne (Walt Disney, Viacom, Time Warner und AMC).
- Während das Portfolio von Walt Disney Viacom bzw. Time Warner im Wesentlichen aus US-amerikanischen Marken besteht, die auf dem europäischen Markt lanciert wurden, verfügt AMC über ein Portfolio von Kindersendern rein europäischer Marken.

Die Reichweiten der Kindersender in Europa

- Gesamteuropäisch gesehen belief sich die auf das Kinderfernsehen entfallende Einschaltquote 2015 auf durchschnittlich 0,8%, was, ausgehend vom Zuschauerpotenzial und unter Berücksichtigung des entsprechenden Angebots, kein gutes Ergebnis ist. Doch natürlich gibt es Märkte, an denen Kindersender populärer sind und über dem Durchschnitt liegen - Rumänien beispielsweise (1,7%), Portugal (1,2%) sowie Italien (1,1%) -, und Märkte, die darunter liegen, wie Lettland (0,1%), Schweiz (0,1%) und Estland (0,2%).
- Die Zuschaueranteile des Kinderfernsehens bezogen auf einen Tag beliefen sich 2015 in Europa auf 5%. An Märkten wie Rumänien (7,5%), Italien (6,4%) und Ungarn (6,3%) gibt es eine höhere Präferenz für Kinderfernsehprogramme, während in Ländern wie der Slowakei (0,1%), Lettland (0,2%) und der Schweiz (1%) eher andere Arten von Programmen gesehen werden.
- Auf die 5 Länder mit dem höchsten Anteil an den gesamteuropäischen Einschaltquoten - Italien (16%), Russland (13%), Deutschland (12%), Großbritannien (12%) und Frankreich (8%) - entfallen 70% aller Zuschauer von Kindersendungen in Europa. Die 10 größten Kinderkanäle erreichen auf gesamteuropäischer Ebene insgesamt mehr als ein Drittel der Gesamtzuschauer von Kindersendungen, während ca. 20% der Kindersender mit Sitz in Europa 70% der gesamteuropäischen Einschaltquoten aller Kindersender auf sich vereinen.
- Die 10 größten Kindersender in Europa - Karusel, Kanal Disney, Super RTL, Clan, Ray Yoyo, Gully, Kika, Cbeebies, Boing und Disney Channel Spain - sind alle in einem der sechs bevölkerungsreichsten Märkte frei zugänglich, wobei es sich bei der Hälfte der Sender um nationale öffentlich-rechtliche Fernsehveranstalter handelt.
- Obwohl die nationalen öffentlich-rechtlichen Sender nur 6% des Angebots für Kinder bereitstellen, liegt ihr Zuschaueranteil vier Mal höher. Darüber hinaus stellten sie die Hälfte der 10 höchsten Einschaltquoten für Kinderfernsehsender in Europa.
- Auf US-amerikanische Kinderfernsehsender, die ihr Publikum eher durch extensive als durch intensive Maßnahmen ansprechen und so bis zu 23 Märkte mit einem



diversifizierten Portfolio erreichen, entfallen in Europa 60% der Zuschauer von Kindersendungen.

- Die 8 größten US-amerikanischen Gruppierungen von Kindersendern, die mehr als 80% der Zuschauer von Kinderprogrammen in den USA erreichen, sind: Disney Channel (27%), Nickelodeon (16%), Cartoon Network (10%), Disney Junior (8%), Boing (8%), Nick Jr. (5%), Boomerang (5%) und Cartoonito (3%)
- Die vier größten US-Konzerne, die in ganz Europa aktiv sind, erreichen in den USA über 90% der Zuschauer von Kinderprogrammen; dabei handelt es sich um: Walt Disney (39%), Time Warner (26%), Viacom (23%) and AMC (4%).

Walt Disney, Time Warner und AMC

- US-Konzerne berücksichtigen die Direktauswertung über Kinderfernsehsender im Zusammenhang mit der Lizenzierung von Rechten; dafür gibt es mehrere Gründe: der Wertschöpfungsanteil lässt sich durch Umgehung europäischer Fernsehsender erhöhen; ein umfangreicher Katalog an teilweise vollständig abgeschriebenen Rechten steht zur Verfügung, was einen relativ kostengünstigen Marktzugang erlaubt; und es ist möglich, eine kohärente gesamteuropäische Markenstrategie zu entwickeln.
- Die gemischten Direktinvestitionen der Konzerne in neue oder bestehende Unternehmen mit Joint Ventures und strategischen Partnerschaften im Zuge der Expansionsbemühungen Europas dienen dazu, die jeweiligen Marken innerhalb Europas zu verbreiten.
- Walt Disney und Viacom zeichnen sich durch eine sehr heterogene Unternehmensstruktur mit bis zu 10 Niederlassungsländern aus; es folgen Time Warner und AMC mit 6 bzw. 7 Lizenzierungsgebieten. Die wichtigsten Lizenzierungszentren der 4 US-Konzerne sind das Vereinigte Königreich, die Tschechische Republik und die Niederlande.
- Die Walt Disney-Gruppe bietet in 3 ihrer Sendergruppen vom Umfang her nahezu gleichwertige Sprachfassungen an, während Time Warner und Viacom über 80% ihrer Kinderprogramme auf jeweils zwei Fernsehnetze aufteilen; und bei AMC werden 60% des Programms über das JimJam-Netz verbreitet.
- Jeder Konzern hat mindestens ein Flaggschiff-Netz wie Disney Channel, Cartoon Network, Nickelodeon oder Minimax in seinem Portfolio, das auf das Mainstreamsegment Kinder und Jugendliche zielt. Darüber hinaus verfügen die Konzerne noch über mindestens ein weiteres Netz für Vorschulkinder - Disney Junior, Cartoonito, Canal Panda und JimJam. Ferner besteht noch die Tendenz, Nischenprogramme, die sich speziell an Jungen richten und in denen mehr Action- und Abenteuerfilme zu sehen sind, zu lancieren und zu fördern.
- Walt Disney, Viacom und AMAC haben jeweils ein Flaggschiff-Netz für Kinder, mit dem zwischen 60% und 70% der jeweiligen Zuschaueranteile erreicht werden. Bei Time Warner sind die Zuschaueranteile gleichmäßiger auf die einzelnen Netze verteilt, wobei die Hälfte der Marken europäisch ist und 44% der Anteile erreichen.
- Die gesamteuropäischen Fernsehnetze für Vorschulkinder Disney Junior und Nick Jr. erreichen 1/5 der Zuschauerquote von Walt Disney bzw. Viacom, während JimJam und Canal Panda 1/3 der Quote von AMC ausmachen; Cartoonito kommt auf etwas mehr als 10% der Zuschauerquote von Time Warner. Zu beachten ist in dem



Zusammenhang jedoch, dass Cartoonito und Canal Panda bestenfalls Marken sind, die es in mehreren Ländern gibt und die im Gegensatz zu transnationalen Marken in höchstens zwei Gebieten bekannt sind.



Principales conclusions

Ce rapport propose une analyse de l'offre de chaînes pour enfants en Europe, de leur performance en termes d'audience et des principaux acteurs du marché qui les contrôlent. La portée de l'analyse est paneuropéenne, avec des références spécifiques à certaines situations nationales.

Les données relatives à l'offre de chaînes de TV pour enfants en termes d'établissement, de disponibilité et du type de propriété sont issues de MAVISE, la base de données sur les sociétés et services de télévision et audiovisuels à la demande gérée par l'Observatoire européen de l'audiovisuel. Les données d'audience sont tirées de la base de données Médiamétrie Une année de télévision dans le monde, gérée par Eurodata TV Worldwide.

La fourniture de chaînes de TV pour enfants en Europe

- 329 chaînes de TV pour enfants (en comptant les différentes versions linguistiques) sont en activité en Europe, ce qui représente 6 % de l'ensemble des chaînes de TV nationales et internationales établies en Europe. Un réseau de TV pour enfants compte en moyenne 2,6 versions linguistiques.
- Seuls 20 % des réseaux pour enfants proposent de multiples chaînes de TV par version linguistique et ils représentent jusqu'à 70 % de l'ensemble de l'offre de chaînes de TV pour enfants en Europe.
- 2 chaînes de TV pour enfants sur 5 sont établies au Royaume-Uni. Les autres principaux pays d'établissement sont la République tchèque (9 %), la Russie (7 %), les Pays-Bas (6 %), l'Italie (5 %) et l'Allemagne (5 %).
- Le public européen a en moyenne le choix entre 23 chaînes pour enfants par marché. Naturellement, les marchés qui sont petits mais multilingues tels que la Belgique (42) et la Suisse (39), ainsi que les marchés de type « petit frère » qui partagent des affinités linguistiques dans la région balte, tels que la Lituanie (36) et l'Estonie (35), ou dans les petits pays adriatiques tels que la Croatie (34) ou le Monténégro (34) disposent d'une offre plus large.

Les acteurs du marché des chaînes de TV pour enfants en Europe

- Environ 85 % des réseaux TV pour enfants en Europe relèvent du secteur privé, 2 réseaux privés sur 3 étant d'origine européenne.
- Alors qu'il représente seulement un quart de l'ensemble des réseaux TV pour enfants en Europe (33), le secteur privé originaire des États-Unis concentre environ 70 % du total des chaînes pour enfants (225) au niveau paneuropéen en raison



d'une offre de 7 versions linguistiques en moyenne par réseau américain pour enfant.

- Plus de 55 % des chaînes de TV pour enfants issues des États-Unis disposent d'une licence émise au Royaume-Uni tandis que les autres, c'est-à-dire 80 % de l'ensemble des chaînes TV pour enfants en Europe, se concentrent en République tchèque (11 %), aux Pays-Bas (7 %) et en Italie (6 %).
- Les chaînes de TV pour enfants originaires des États-Unis sont fortement concentrées tant au niveau des réseaux qu'au niveau des groupes. Au moins 1 chaîne TV pour enfants sur 2 fait partie de l'un des 10 plus grands réseaux américains en nombre de chaînes (Nickelodeon, Disney Channel, Boomerang, Cartoon Network, JimJam, Nick Jr., Disney Junior, Disney XD, Baby TV, Minimax) et appartient à l'un des 4 plus grands groupes américains (Walt Disney, Viacom, Time Warner et AMC) suivant les mêmes critères.
- Tandis que les offres de Walt Disney Viacom et Time Warner se composent principalement de marques américaines qui ont été lancées sur le marché européen, le portefeuille d'AMC se distingue par une offre composée de chaînes TV pour enfants uniquement de marque européenne.

L'audience des chaînes TV pour enfants en Europe

- Au niveau paneuropéen, l'audience annuelle moyenne enregistrée par les chaînes de TV pour enfants s'élevait à 0,8 % en 2015, ce qui témoigne d'une sous-performance en termes de potentiel de consommation par rapport à l'offre. Il existe évidemment des marchés dans lesquels les chaînes de TV pour enfants sont plus populaires par rapport à la moyenne, tels que la Roumanie (1,7 %), le Portugal (1,2 %) et l'Italie (1,1 %) et des marchés dans lesquels leurs résultats sont plus faibles, par exemple en Lettonie (0,1 %), en Suisse (0,1 %) ou en Estonie (0,2 %).
- La part d'audience quotidienne des chaînes de TV pour enfants en Europe atteignait 5 % en 2015. Des marchés tels que la Roumanie (7,5 %), l'Italie (6,4 %) et la Hongrie (6,3 %) témoignaient d'une préférence accrue pour les chaînes de TV pour enfants, tandis que d'autres marchés comme la Slovaquie (0,1 %), la Lettonie (0,2 %) et la Suisse (1 %) privilégiaient d'autres types de chaînes.
- Les 5 marchés les plus importants en termes d'audience, à savoir l'Italie (16 %), la Russie (13 %), l'Allemagne (12 %), la Grande-Bretagne (12 %) et la France (8 %) représentaient 70 % du total des points d'audience enregistrés par les chaînes de TV pour enfants en Europe. Les 10 principales chaînes de TV pour enfants représentaient plus d'1/3 de l'audience totale des chaînes enfants enregistrée au niveau paneuropéen, tandis qu'environ 20 % des chaînes de TV pour enfants établies en Europe concentraient 70 % des audiences enregistrées par l'ensemble des chaînes pour enfants au niveau paneuropéen.
- L'ensemble des 10 principales chaînes de TV pour enfants, représentées par Karusel, Kanal Disney, Super RTL, Clan, Ray Yoyo, Gully, Kika, Cbeebies, Boing et Disney Channel Spain, sont en accès gratuit dans l'un des 6 plus grands marchés européens en termes de population, et la moitié d'entre elles sont des chaînes publiques nationales.
- Bien qu'elles ne représentent que 6 % de l'offre de chaînes enfants en Europe, les chaînes publiques nationales atteignent une part d'audience 4 fois plus grande. De



plus, elles rassemblent la moitié des 10 principales audiences de chaînes de TV pour enfants en Europe.

- En revanche, les chaînes de TV pour enfants originaires des États-Unis, qui représentent 60 % de l'audience totale des chaînes pour enfants en Europe, construisent leurs audiences en se fondant sur une approche extensive plutôt qu'intensive, et atteignent jusqu'à 23 marchés grâce à une offre diversifiée.
- Les 8 principaux réseaux américains de chaînes de TV pour enfants, qui rassemblent plus de 80 % de l'audience des chaînes pour enfants américaines, sont Disney Channel (27 %), Nickelodeon (16 %), Cartoon Network (10 %), Disney Junior (8 %), Boing (8 %), Nick Jr. (5 %), Boomerang (5 %) et Cartoonito (3 %).
- Les 4 principaux groupes américains paneuropéens, qui concentrent plus de 90 % de l'audience des chaînes pour enfants américaines sont Walt Disney (39 %), Time Warner (26 %), Viacom (23 %) et AMC (4 %).

Le point sur les groupes Walt Disney, Time Warner and AMC

- Plusieurs facteurs expliquent pourquoi les groupes originaires des États-Unis ont adjoint l'exploitation directe de chaînes enfants à la cession de droits : l'opportunité de s'octroyer une plus grande part de la valeur ajoutée en contournant les chaînes de TV européennes ; un large fonds de catalogue de droits à disposition, dans certains cas déjà entièrement amorti, et donc un coût d'entrée sur le marché relativement faible ; la possibilité de développer une stratégie de marque paneuropéenne cohérente.
- Les groupes ont combiné une stratégie d'investissement direct dans des entreprises existantes ou nouvelles avec des joint-ventures et des partenariats stratégiques dans leur quête d'expansion européenne, afin de porter leurs marques dans plusieurs pays européens.
- Walt Disney et Viacom présentent les structures organisationnelles les plus hétérogènes, avec jusqu'à 10 pays d'établissement, suivis par Time Warner et AMC qui sont respectivement installés dans 6 et 7 territoires. Les principaux pôles de conventionnement des 4 principaux groupes américains sont le Royaume-Uni, la République tchèque et les Pays-Bas.
- Walt Disney présente une gamme de versions linguistiques quasiment uniforme pour 3 de ses réseaux, tandis que Time Warner et Viacom concentrent plus de 80 % de leurs chaînes TV pour enfants au sein de deux réseaux chacun. AMC, pour sa part, rassemble 60 % de son offre de chaînes au sein du réseau JimJam.
- Chaque groupe compte dans son offre au moins un réseau emblématique tel que Disney Channel, Cartoon Network, Nickelodeon ou Minimax, qui cible un segment traditionnel d'enfants et de jeunes. Les groupes proposent également au moins un réseau supplémentaire qui s'adresse aux préscolaires tels que Disney Junior, Cartoonito, Canal Panda et Jim Jam. Il existe en outre une tendance au lancement et à la promotion de chaînes de niche pour enfants, axées sur l'action et l'aventure, qui s'adressent plutôt aux garçons, telles que Disney XD, Toonami, Nicktoons et Mexamax.
- Walt Disney, Viacom et AMC comptent un réseau emblématique pour enfants qui engendre entre 60 % et 70 % de leurs parts d'audience. Time Warner présente une



répartition plus équilibrée de son audience entre ses réseaux, la moitié de ses marques étant européennes et rassemblant 44 % de l'audience.

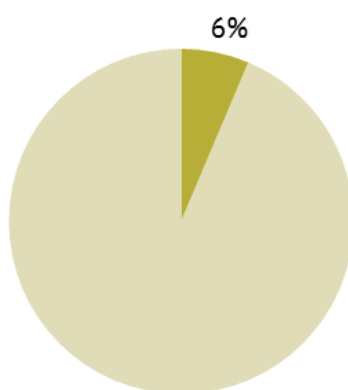
- Les réseaux préscolaires paneuropéens, Disney Junior et Nick Jr. représentent 1/5 des audiences de Walt Disney et Viacom, tandis que JimJam et Canal Panda comptent pour 1/3 des audiences d'AMC et Cartoonito pour un peu plus de 10 % des audiences de Time Warner. Il convient cependant de souligner que Cartoonito et Canal Panda sont des marques multi-pays qui couvrent au maximum deux territoires, plutôt que des marques transnationales.

1. The supply of children’s TV channels in Europe

This chapter offers a snapshot of the pan-European offering of children’s TV channels by analysing all national and international children’s TV channels established in 40 territories across Europe, with the exception of channels splitting their broadcasting frequency during the day with others. The analysis is based on 2016 data from MAVISE, the database on TV and on-demand audiovisual services and companies in Europe managed by the European Audiovisual Observatory.

There are 329 channels established in Europe dedicated to children. The children’s TV channels account for 6% of all national and international channels established in Europe, regardless of their genre. This figure covers the total number of children’s TV channels including all their linguistic versions, and thus displays the full picture of supply width.

Figure 1. Share of children’s TV channels (including linguistic versions) established in Europe (%)



Source: European Audiovisual Observatory / MAVISE database

Broadcasters and packagers use language as a first or minimum step in achieving content localisation, a goal usually associated with transnational brands which experience higher cross-border circulation than channels that follow a national or multi-country model.

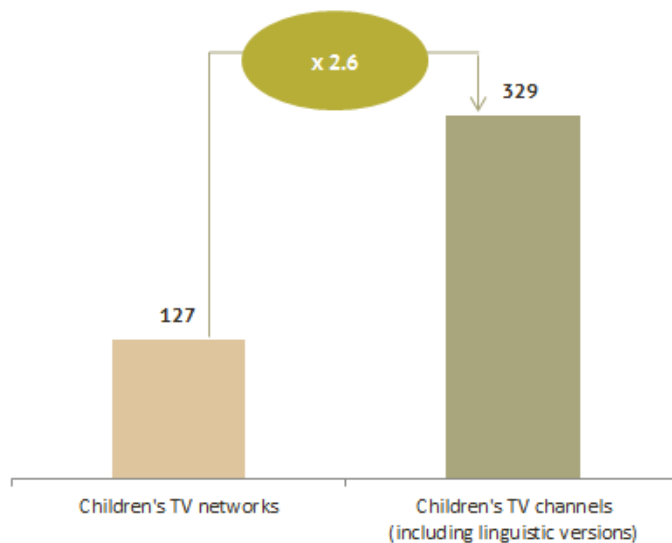
In this comparison, ‘transnational’ or ‘pan-European brand’ channels and groups are those travelling or operating across a wide range of countries throughout Europe.

‘Multi-country’ channels or companies on the other hand are more likely to focus on a smaller number of markets, usually sharing cultural or language affinities, accessible with homegrown brands or even US brands featuring a higher level of localisation with regard to content. While the transnational companies primarily seek territorial expansion of their channels through an increase in distribution markets, the multi-country group model focuses more on intensive development of existing markets, usually through the promotion of free-access services and audience build-up, before any move forward.

Localisation of language can generally come in the form of subtitles or dubbing depending on the budgets available, on the audiences’ experience and expectations with regard to language, and of course on the size of each market. In the case of children’s channels, language localisation relies mainly on dubbing. In addition to the obvious language difference, varying linguistic channel versions can feature additional localised elements ranging from adapted advertising to production of original local content.

Any reference to number of channels in this analysis includes all linguistic versions of a children’s TV network³ so that the supply picture is fully represented. A children’s TV network established in Europe and included in this report has on average just over 2.5 linguistic versions (channels) available per national market.

Figure 2. Average number of linguistic versions per children’s TV network in Europe

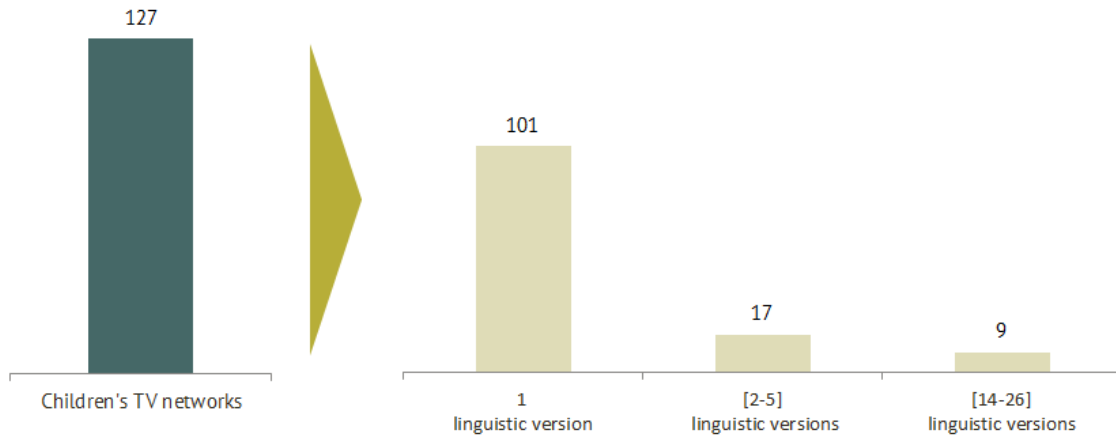


Source: European Audiovisual Observatory / MAVISE database

Only one in five children’s TV network has multiple linguistic versions. However, cumulatively they comprise 70% of the total children’s TV channel supply in Europe.

³ For e.g., Disney Channel has 25 linguistic versions circulating across European territories tracked in this study. Thus, Disney Channel’s children’s TV network comprises 25 children’s TV channels established in Europe.

Figure 3. Breakdown of children’s TV networks by number of linguistic versions available



Source: European Audiovisual Observatory / MAVISE database

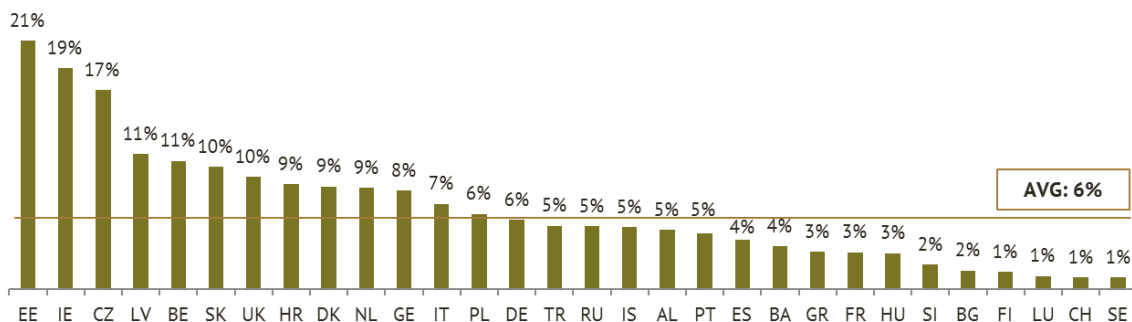
A total of 26 children’s TV networks identified in this report have between two and a maximum of 26 linguistic versions circulating across European borders, and account for the vast majority of children’s TV channels in Europe.

How does the average weight of children’s TV channels in Europe vary at country level? In other words, which European countries are more prone to licensing children’s TV channels?

With regard to licensing, 6% of TV channels licensed in Europe are children’s channels. The majority of countries has one or more children’s channels under their national licensing regime while one in four has no such channels established in their territory.

Figure 4. Children’s TV channel licensing by country of establishment

Weight of children’s TV channels among total TV channels established in the country (%)



Source: European Audiovisual Observatory / MAVISE database

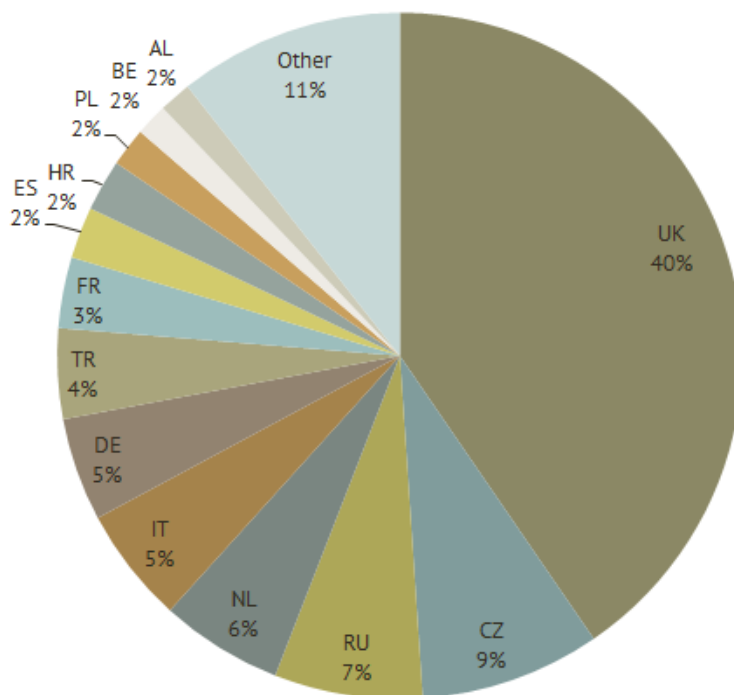
There is a sizeable gap between countries with the highest and lowest shares of children’s TV channels established: Estonia (21%), Ireland (19%) and the Czech Republic

(17%) have a significantly higher share of licensed children’s TV channels than countries such as Sweden (1%), Switzerland (1%), Luxembourg (1%) and Finland (1%).

This relative importance assessment at country level is complemented through a closer look at the extent to which each of these countries contributes to the overall pan-European children’s TV channel supply.

Figure 5. Contribution to European supply of children’s TV channels by country of establishment

Weight of children’s TV channels established in a specific country, among total number of children’s TV channels established in Europe (%)



Source: European Audiovisual Observatory / MAVISE database

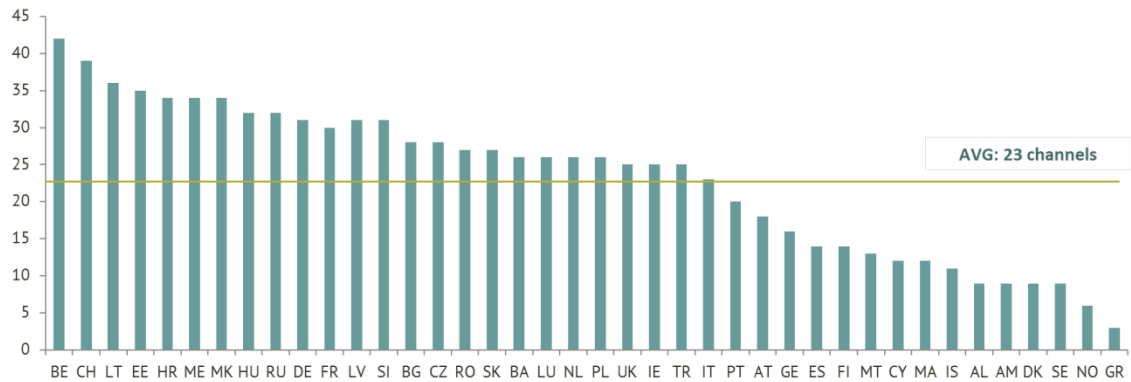
A recent European Audiovisual Observatory study revealed that the United Kingdom licensed 35% of all children’s TV channels established in Europe. Two out of every five licences issued for children’s TV channels in Europe are under UK jurisdiction. The remaining 60% of children’s TV channels are distributed between the other 29 countries of establishment, with the Czech Republic (9%), Russia (7%), the Netherlands (6%), Italy (5%) and Germany (5%) accounting for just over half .

From the consumer perspective however, regardless of where the channels were established, the European audience can choose from an average of 23 children TV channels per national market.

The number of children’s channels available depends on a series of factors such as: the actual demand for children’s TV channels; the level of children’s TV content scheduled on the main generalist TV channels in a particular market; the economic context; distribution agreements; technological developments; cultural specificity; the level of

market openness with regard to foreign brands and productions; language and content affinity etc.

Figure 6. Number of children’s TV channels (including linguistic versions) available in Europe



Source: European Audiovisual Observatory / MAVISE database

Smaller but multi-lingual markets such as Belgium and Switzerland have a wider offering than the pan-European average. Similarly, the offering is broader in ‘little brother’ countries that share language affinities, such as the Baltic or small Adriatic states.

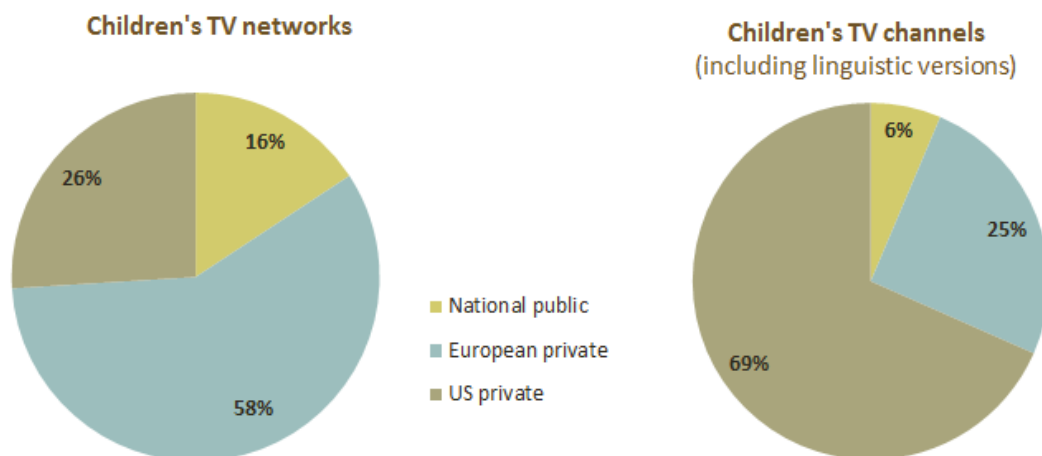
2. The market players for children’s TV channels in Europe

The availability and circulation of children’s TV channels in Europe is also influenced by ownership specificity – often reflected in strategy – as well as the main origin of the content, and editorial policy.

Ownership also influences demand through the public perception of its status in a respective market. For example, foreign channels may find it more difficult to thrive in a market with a national stronghold in children’s television – whether in the form of standalone channels or content scheduled on generalist stations. On the other hand, prominent ‘must have’ foreign children’s TV networks can leverage their brands.

Finally, local versus global content compromises require constant tailoring and balancing of production endeavours and programming strategies. These market realities driven by ownership origin along with many other factors impact the structure of children’s TV channels’ offerings.

Figure 7. Breakdown of children’s TV channel supply by type of ownership in Europe (%)



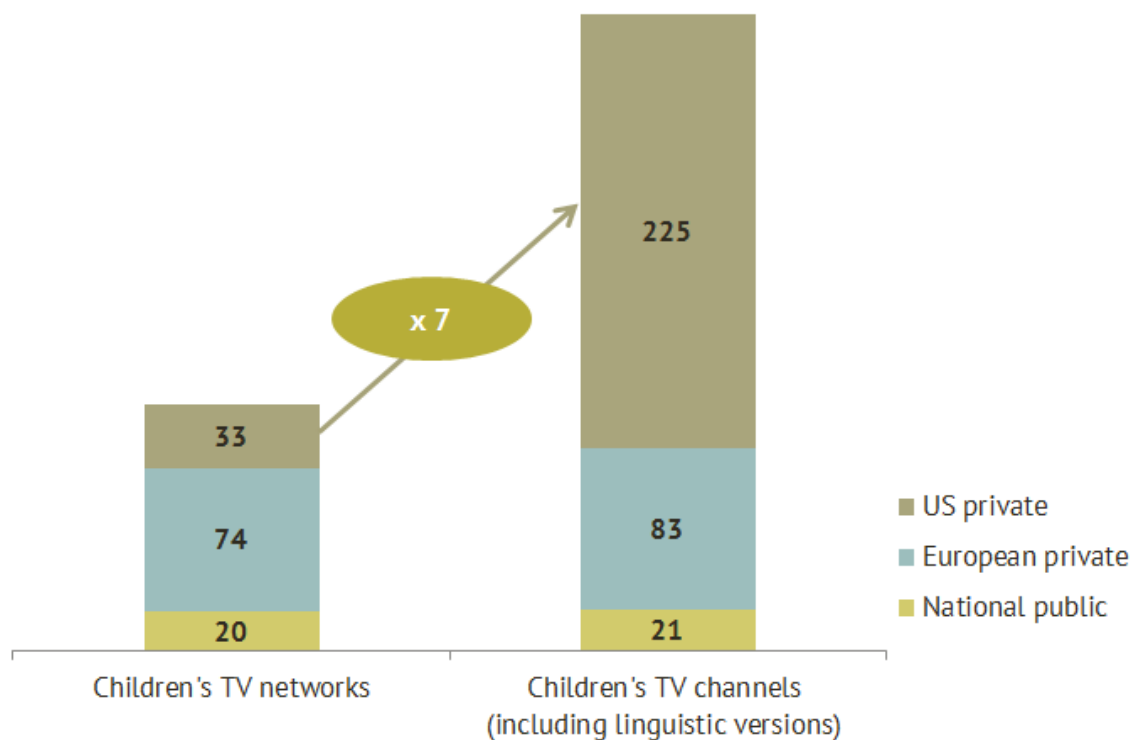
Source: European Audiovisual Observatory / MAVISE database

At the pan-European level over 80% of the children’s TV networks are owned⁴ by the private sector, with two out of three private networks of European origin. Thus, more than half of the children’s TV networks established in Europe are controlled by the private European sector.

When the various linguistic versions corresponding to each children’s TV network are taken into account, though, the establishment structure tilts substantially towards US private ownership. With a much higher expansion drive, fuelled by broader prominence, the US-owned children’s TV networks are able to localise many more channels, even if only language adaptation is considered.

Featuring seven linguistic versions on average per network - almost three times more than the pan-European average – two out of three children’s TV channels established and circulating in Europe are of US origin. European private and national public networks are responsible for lowering the pan-European linguistic version average. Taken together, only 1% of the European private and national public networks feature multiple language versions while 70% of privately-owned US networks boast multiple linguistic versions.

Figure 8. Average number of linguistic versions per US children’s TV network



Source: European Audiovisual Observatory / MAVISE database

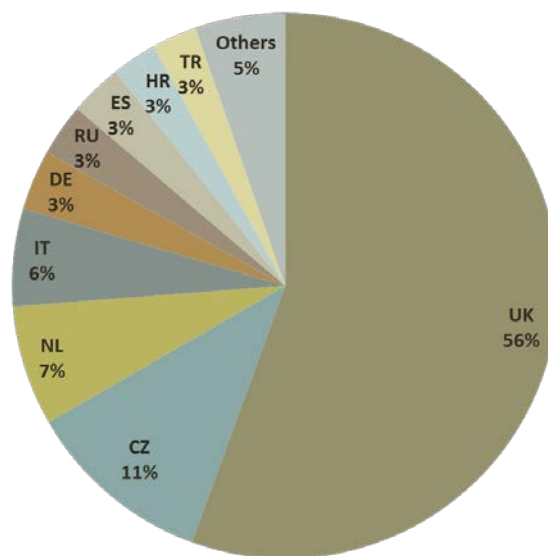
⁴ Highest identified ownership entity.

There are 33 US children’s TV networks established in Europe comprising a total of 225 children’s TV channels of US origin, including linguistic versions.

More than half of the US children’s TV channels are licensed in the UK (56%) while the rest, encompassing nearly 80% of all children’s TV channels, are concentrated in the Czech Republic (11%), the Netherlands (7%) and Italy (6%).

It is therefore evident that not only is the UK prone to licensing children’s TV channels in general (as seen before), but it is also an attractive licensing hub for those under US ownership.

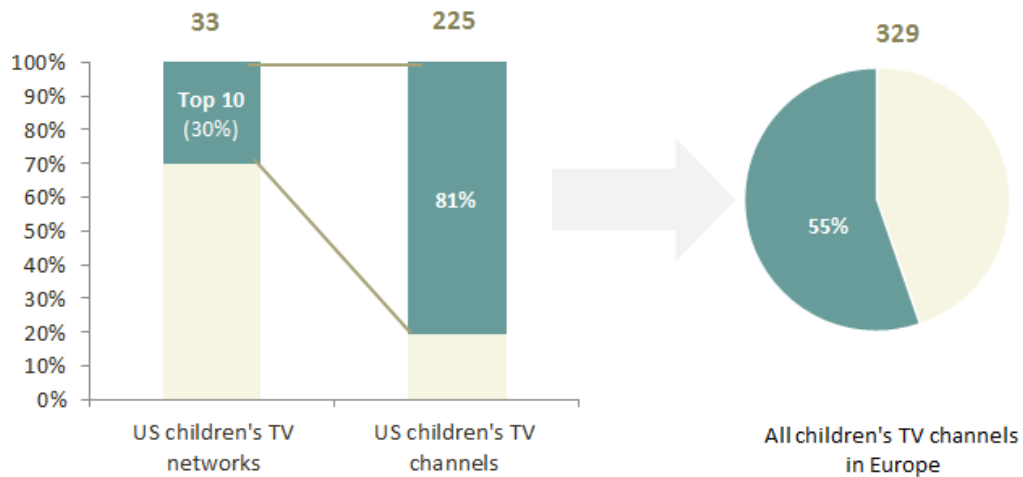
Figure 9. Breakdown of US children’s TV channels by country of establishment (%) (including linguistic versions)



Source: European Audiovisual Observatory / MAVISE database

The linguistic versions for US children’s TV channels tend to be very concentrated at network level. Ranked by number of channels, the leading 10 US children’s TV networks encompass over 80% of the US children’s TV channels and account for more than half of all children’s TV channels established in Europe.

Figure 10. The top 10 US children’s TV networks control over 50% of children’s TV channels in Europe

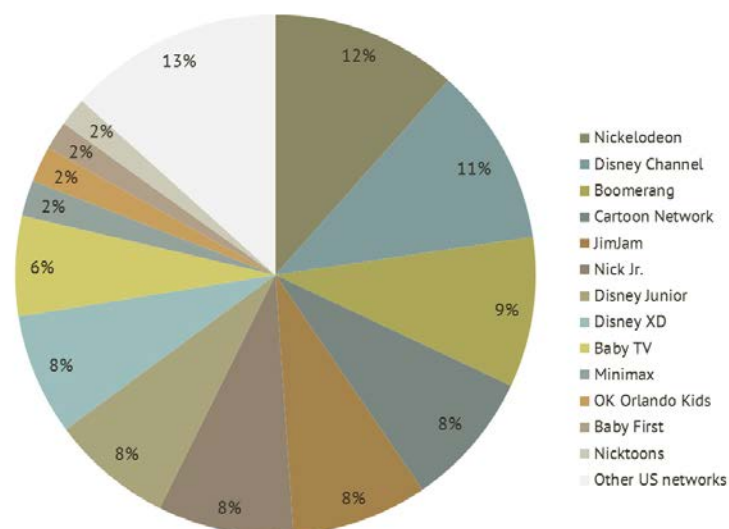


Source: European Audiovisual Observatory / MAVISE database

Nickelodeon (12%), Disney Channel (11%) and Boomerang (9%) not only top the chart with the highest number of channels, but are also joined in the top 10 by some of their sister networks, namely Disney Junior (8%), Disney XD (8%), Cartoon Network (8%) and Nick Jr. (8%). Seven out of the top 10 US children’s TV channels in Europe are therefore controlled by The Walt Disney Company, Viacom and Time Warner.

Another two top 10 networks, Jim Jam and Minimax, although US by ownership, stand out due to their European DNA. Unlike the purely US homegrown networks, they were conceived, launched and built upon specially for the European market.

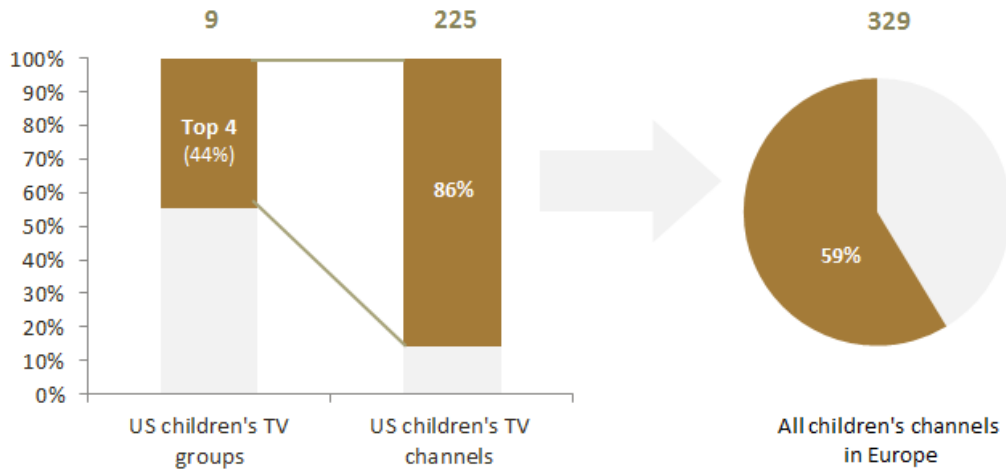
Figure 11. Breakdown of US children’s TV channels by US networks at pan-European level (%)



Source: European Audiovisual Observatory / MAVISE database

There is an even higher concentration of children’s TV channels at the US group level. Just nine US groups control all of the US children’s TV channels established in Europe, with the top four groups accounting for over 85% of the channels.

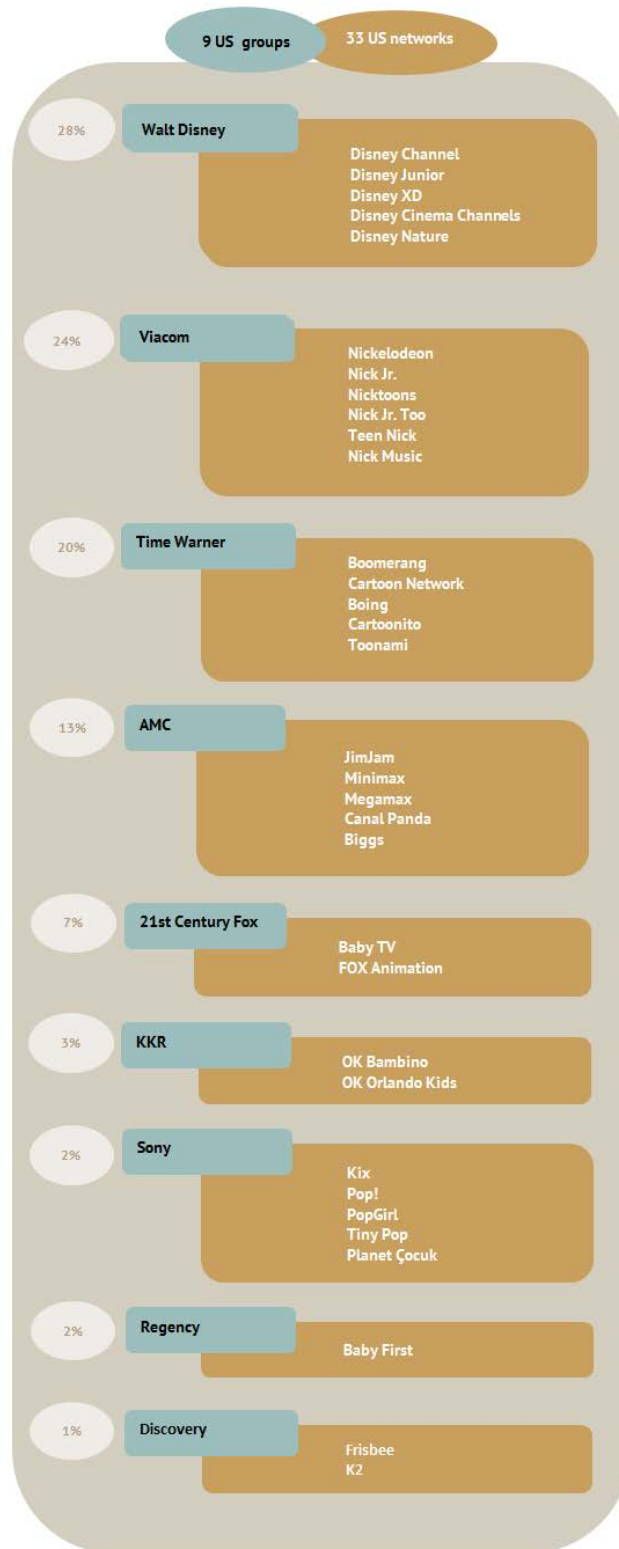
Figure 12. The top 4 US children’s TV groups control around 60% of children’s TV channels in Europe



Source: European Audiovisual Observatory / MAVISE database

At the pan-European level, this means that three in five children’s TV channels are owned by one of the top four US groups in Europe in terms of children’s TV portfolio width, namely Walt Disney (28%), Viacom (24%), Time Warner (20%) or AMC (13%).

Figure 13. Ranking of US groups and their respective networks by share of children’s TV channels controlled, at pan-European level



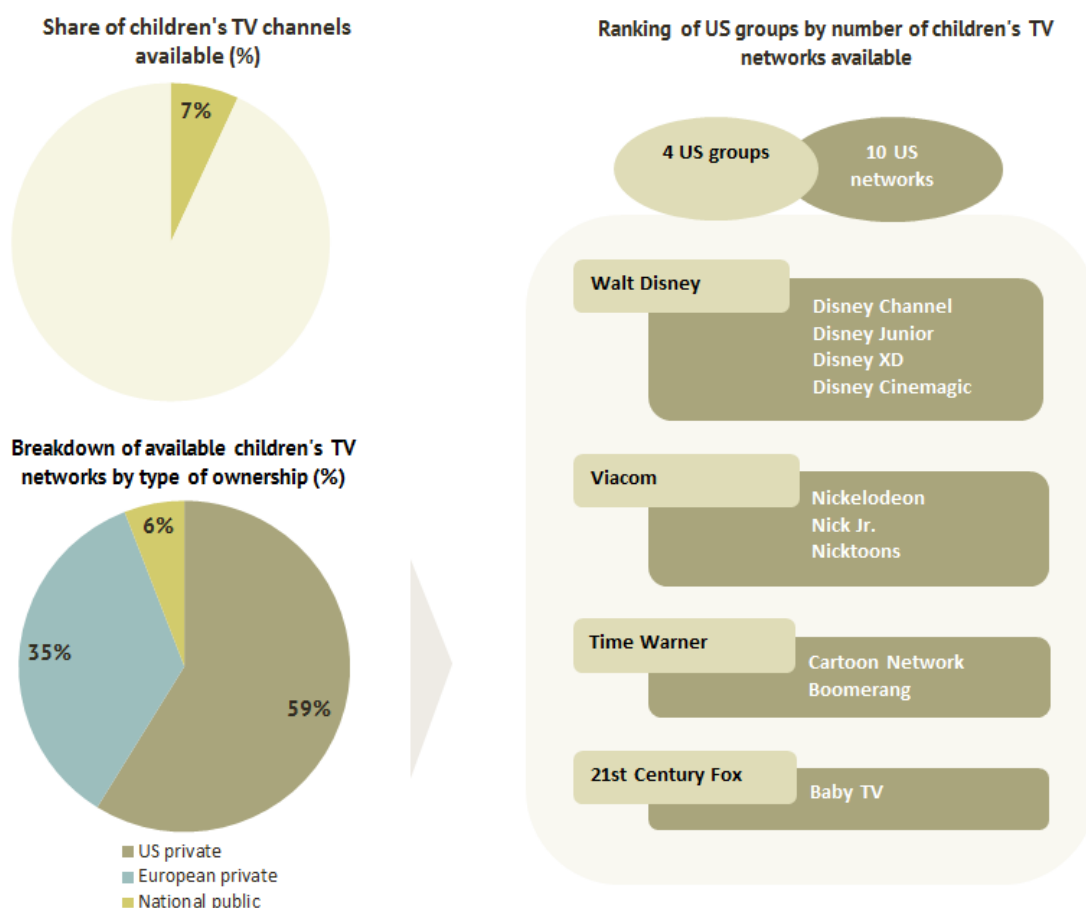
Source: European Audiovisual Observatory / MAVISE database

It is interesting to note that all of the top four are pan-European or transnational groups of US origin. While the top three have portfolios mainly formed of US brands launched on the European market, AMC stands out due to its fully European-branded children's TV channel portfolio.

From the consumer perspective, the availability structure and players vary depending on the specific market contexts. Romania, Slovakia, Sweden and Germany, for instance, show contrasting situations.

The shares of available children's TV channels, including linguistic versions, do not vary significantly at market level, apart from Sweden where children's TV channels tend to be slightly under-represented within the national TV offering when compared to the other countries. For example, children's TV channels in Germany enjoy up to three times greater presence on the main distribution platform line-ups than they do in Sweden.

Figure 14. Supply and market players for children's TV channels in Germany



Source: European Audiovisual Observatory / MAVISE database

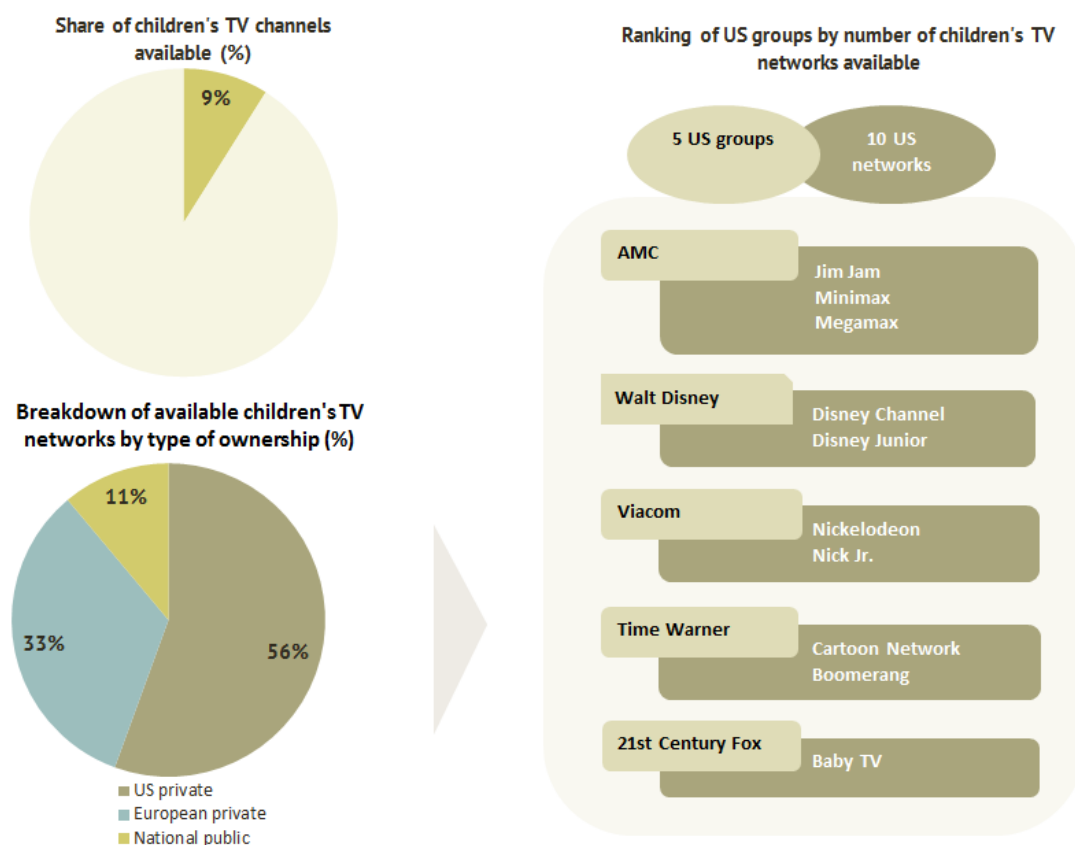
From the ownership structure point of view, the share of US private children's TV networks available in any of these four markets is at least two times higher than the share of established US networks at the pan-European level. This shows that the US children's TV

networks circulate much better compared to the European private or the national public ones. US groups exploit this circulation potential by developing many more linguistic versions per network than the European or public children’s networks do.

Slovakia and Germany feature a similar ownership structure and, unlike in the other two countries, all three categories of national public, European and US private children’s TV networks are available on their distribution platforms. At least one out of every two networks are of US origin while the ratio is one to three for European private networks. In Germany, all European private networks are national brands such as Super RTL, Junior and RIC, and the offer is complemented by KiKA, the domestic public network.

In Slovakia, on the other hand, almost half of the European private networks come from the Czech Republic, a characteristic of ‘little brother’-type countries with few to no language barriers. National private brands of children’s TV networks are represented by Rik and Tuki while the national public ones are all targeted at the country from outside.

Figure 15. Supply and market players for children’s TV channels in Slovakia



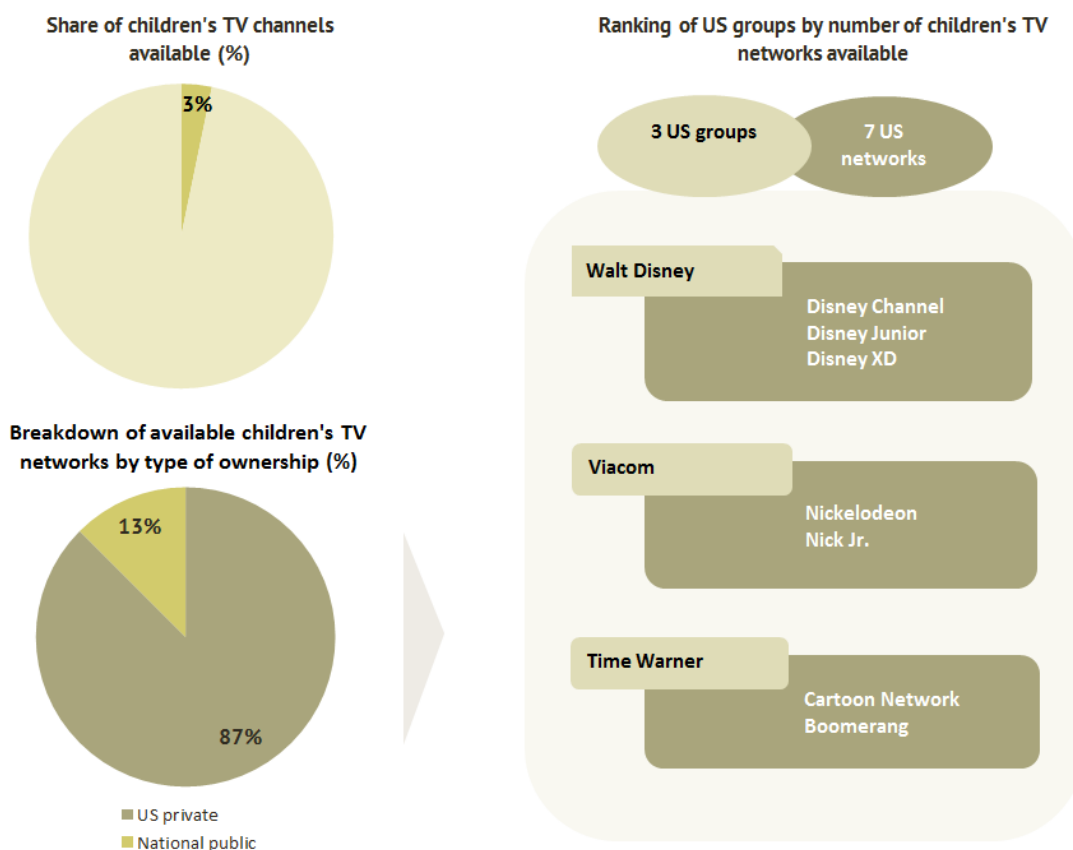
Source: European Audiovisual Observatory / MAVISE database

In Romania and Sweden four out of five available children’s TV networks are of US origin. While in Romania the rest is represented by European private networks established outside the country, such as Duck TV and Super RTL, in Sweden the US offering is complemented by the national public channel, SVT Barnkanalen. Thus, Romania does not

have in its offering any public national children’s TV networks and in Sweden the only European content circulating is domestic and public. It would therefore appear that the countries with a strong domestic public children’s channel, such as Germany and Sweden, have fewer US groups present in the market.

A closer look at the US groups present in these four markets reveals, in each country, a systematic presence of the top three pan-European groups, namely Walt Disney, Viacom and Time Warner.

Figure 16. Supply and market players for children’s TV channels in Sweden

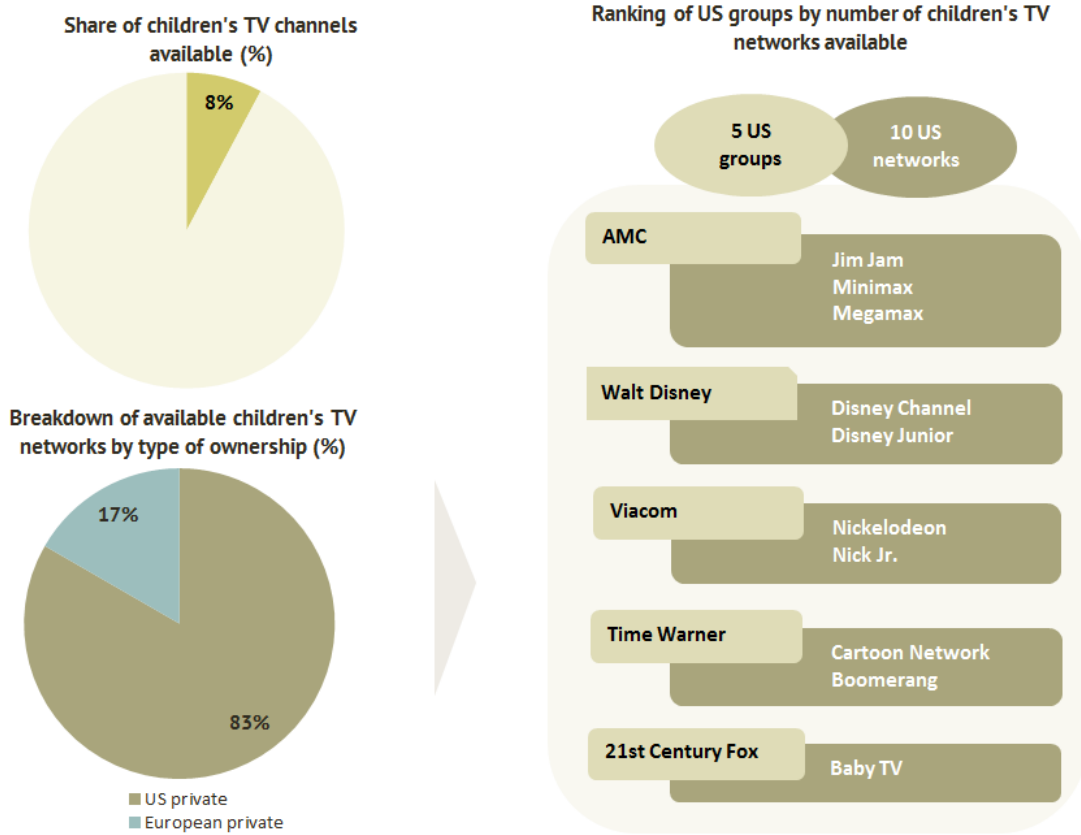


Source: European Audiovisual Observatory / MAVISE database

It is interesting to note that in Central and East European countries the AMC group boasts the broadest availability, with three children’s TV networks present in both Romania and Slovakia, namely JimJam, Minimax and Megamax.

AMC replaces Walt Disney’s position in terms of children’s TV network presence and circulation in this region, compared to Western Europe and Scandinavia.

Figure 17. Supply and market players for children's TV channels in Romania



Source: European Audiovisual Observatory / MAVISE database

Although AMC networks are US by ownership they are perceived as European by the public, so from the consumer perspective they are actually addressing the demand for content supplied by European private groups.

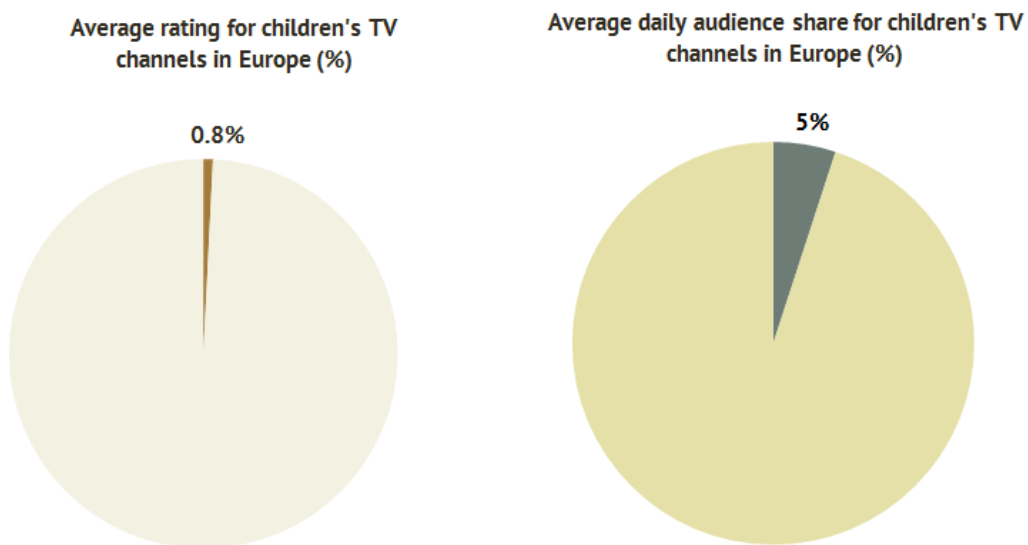
3. Children’s TV channel audiences

The supply and circulation potential of children’s TV channels in Europe constitute an important dimension of the prevailing business architecture and its models, and are an important factor in the positioning of the different players in the market based on their portfolio diversity and adaptability.

The supply aspect can be contrasted with the performance of children’s TV channel portfolios. Several indicators can be examined in this context, but this chapter offers an assessment of consumption measured in terms of audiences registered by the children’s TV channels in Europe.

As in the section on offerings, this analysis includes the audiences measured in 40 European countries for national and international children’s TV channels other than the ones splitting frequencies during the day with non-children’s TV stations. In contrast, though, to the supply and availability indicators assessed based on the data sourced from the MAVISE database, the indicators used in this audience analysis are based on Médiamétrie 2015 data have sometimes been adapted or amended by the European Audiovisual Observatory for statistical accuracy purposes. Some of the children’s TV channels present in the supply analysis section are not part of the audience study, if no ratings were reported for them.

Figure 18. Average audiences for children’s TV channels in Europe



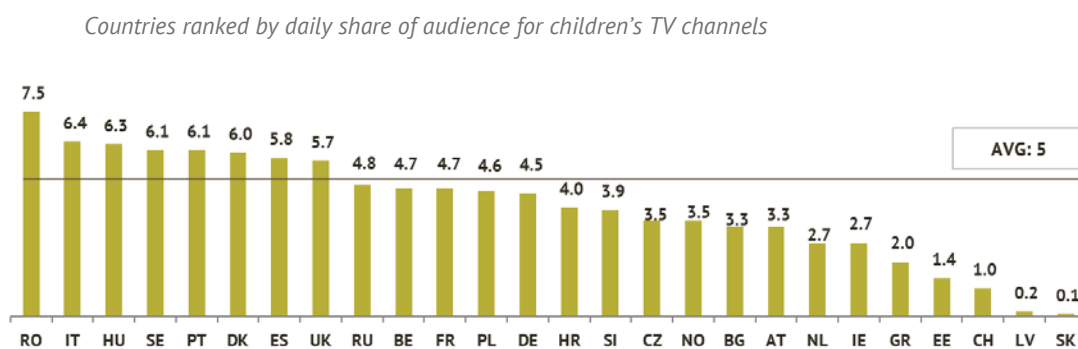
Source: European Audiovisual Observatory / Eurodata TV Worldwide

The market performance of children’s TV channels, networks and groups has been estimated by analysing the ratings⁵ and daily audience shares⁶ at the country and pan-European level and through correlations, when significant, with the supply extent and structure, to allow for a better reflection of how the children’s TV channels in general, or the different portfolios in particular, are being adopted by the viewers.

On average, almost 1% of the population measured in Europe was tuning in to children’s TV channels in 2015. Correlated with the supply share, this indicates underperformance in terms of consumption potential.

However, when the analysis is restricted to the number actually watching TV, children’s TV channels reached an average 5% daily audience share at the pan-European level - much closer to the supply share of children’s channels in Europe.

Figure 19. Preference for watching children’s TV channels in European countries (%)



Source: European Audiovisual Observatory / Eurodata TV Worldwide

This average viewing preference for children’s TV channels can vary substantially at market level depending on several factors including the level of audience affinity with such content and the degree of demand already serviced by dedicated children’s TV programming blocks broadcast on the main generalist channels. In countries such as Romania, Italy, Hungary, Sweden, Portugal, Denmark, Spain and the United Kingdom children’s TV channels are more likely to be opted for, over other categories of channels, than in Slovakia, Latvia, Switzerland, Estonia, Greece, Ireland, the Netherlands and others. It is important to underscore that this does not illustrate children’s programming preferences in general, but only those related to standalone children’s TV channels.

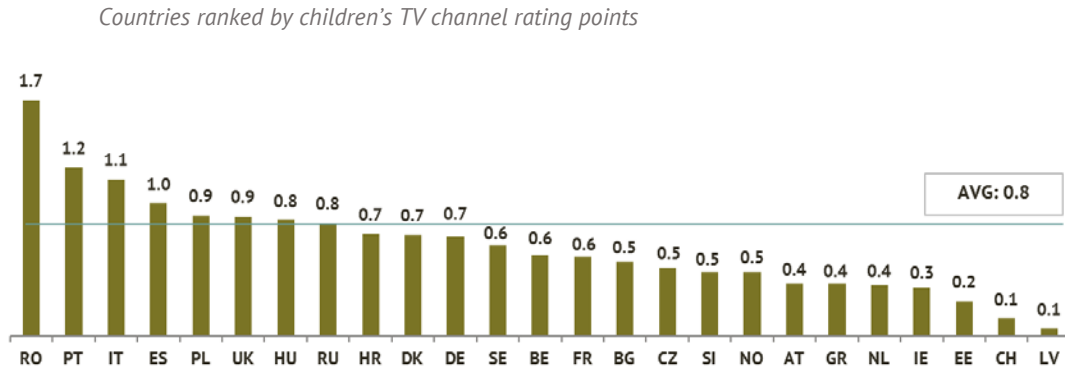
Analysis of the ratings reveals several countries that stand out in terms of children’s TV channel popularity. In Romania, Italy and the United Kingdom, preferences are more or

⁵ Average number of viewers over the total duration of the programme calculated in percentage of the target group. It measures the popularity of a programme or channel by comparing its audience to the population as a whole. The average number of viewers can also be expressed in thousands.

⁶ The percentage of total viewing audience watching over a given period of time. It measures the preference of a programme or channel.

less aligned with popularity, but in Portugal, Spain and Poland high viewership potential has not yet been fully exploited.

Figure 20. Popularity of children’s TV channels across European countries (%)

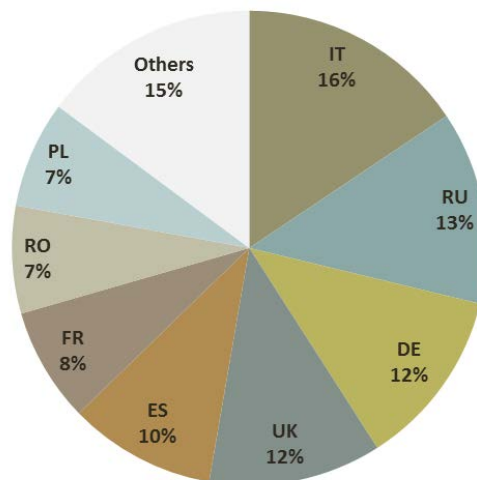


Source: European Audiovisual Observatory / Eurodata TV Worldwide

Markets such as Sweden, Denmark and Hungary, on the other hand, are very efficient at converting market potential into actual viewership. What they lack in popularity (they fall under the European average), they make up for in preference, by capturing over 6% of daily audience share in their respective markets –at least 1% over the pan-European average.

The pan-European ratings of children’s TV channels have a tendency to be concentrated around several key markets. Italy (16%), Russia (13%), Germany (12%), the United Kingdom (12%) and France (8%), representing less than a quarter of the markets measured in this study, account for 70% of total rating points registered by children’s TV channels in Europe.

Figure 21. Importance of children’s TV channel markets by contribution to pan-European ratings (%)

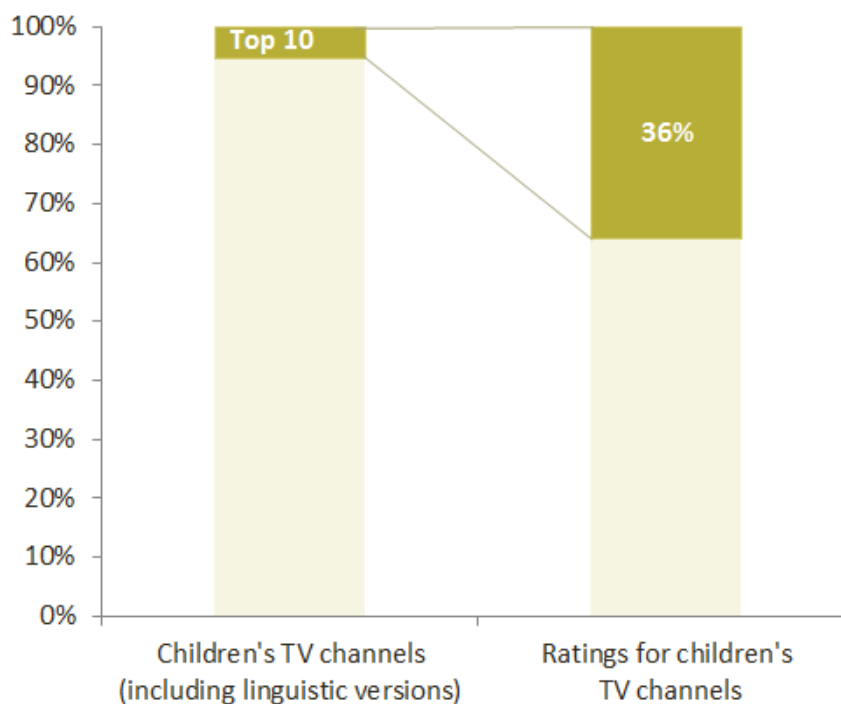


Source: European Audiovisual Observatory / Eurodata TV Worldwide

The ratings concentration is visible not only at market level. It is also important to note that a small number of children’s TV channels attract most of the consumption delivering the pan-European ratings.

In other words, a narrow selection of highly popular children’s TV channels captures a significant share of the market potential. For e.g., just 19% of children’s TV channels established in Europe account for 70% of the European ratings, while the upper 5% (top 10) make up over half of the ratings.

Figure 22. Concentration of ratings by top 10 children’s TV channels in Europe



Source: European Audiovisual Observatory / Eurodata TV Worldwide

One in three Europeans watches one of the top 10 children’s TV channels in Europe ranked by rating points. These top 10 channels account for more than a third of the total ratings delivered by children’s TV channels established in Europe.

The top 10 children’s TV capture an average 100 million viewers each, due to a number of factors, including: First, these performances are registered by the channels in the top six countries in Europe. Second, in all these markets the channels offer free access.

Also noteworthy is the fact that, unlike the mere 6% share of supply of national public children’s TV channels at the pan-European level, for these top 10 channels the national public share rises to 50%. This reflects the high concentration of ratings at PSBs level or, in other words, the fact that PSBs are among the top-performing children’s TV channels.

Table 1. Top 10 children’s TV channels in Europe by ratings

Children’s TV channel	Country	Ownership	Access
Karusel	RU	National public	Free
Kanal Disney	RU	US private	Free
Super RTL	DE	European private	Free
Clan	ES	National public	Free
Ray Yoyo	IT	National public	Free
Gulli	FR	European private	Free
Kika	DE	National public	Free
Cbeebies	GB	National public	Free
Boing	ES	US private	Free
Disney Channel	ES	US private	Free

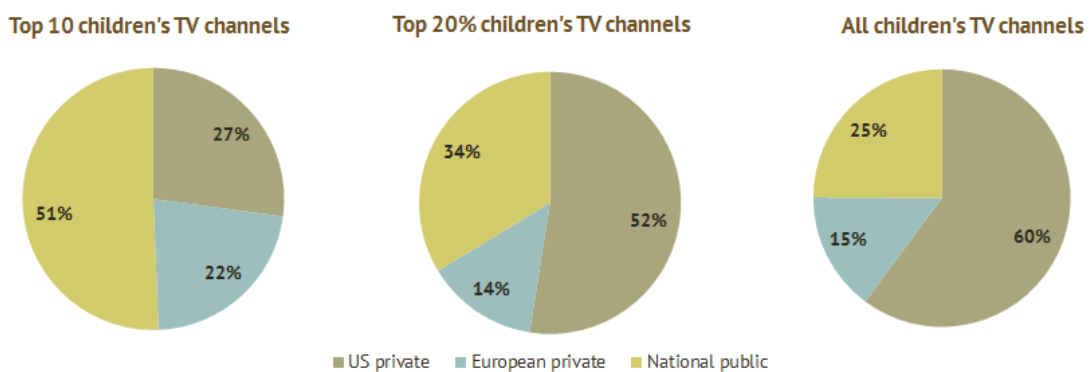
Source: European Audiovisual Observatory / Eurodata TV Worldwide

Figure 23 below also shows how the public national children’s TV channels manage to capture half of the ratings accumulated by the top 10 channels.

The comparison of ownership structures between the top 10, the top 20%, and the overall top children’s TV channels by ratings, further highlights the fact that the national public channels perform strongly in the markets in which they are present.

Although few in number, the public children’s TV channels still attract one out of every four viewers in Europe, thus accounting for 25% of total European ratings for children’s TV channels. Also, when compared to the other two categories, the public sector portfolio of children’s channels stands out as the most efficient in fostering and developing its audiences, with a market share four times higher than its portfolio share by number of channels.

Figure 23. Breakdown of children’s TV channel audiences in Europe by type of ownership (%)



Source: European Audiovisual Observatory / Eurodata TV Worldwide

It is interesting to note how on the other hand the US private children’s TV channels build up their audiences by applying an extensive rather than intensive approach.

They are increasing their pan-European ratings mainly by diversifying and expanding their portfolios rather than by aiming to boost the audiences for existing channels in a given market. US private children’s channels manage to capture the audiences from 23 markets as opposed to national public channels, for which ratings were recorded in only 12 markets.

Figure 24. Breakdown of total children’s TV channel ratings at market level by ownership type (%)



Source: European Audiovisual Observatory / Eurodata TV Worldwide

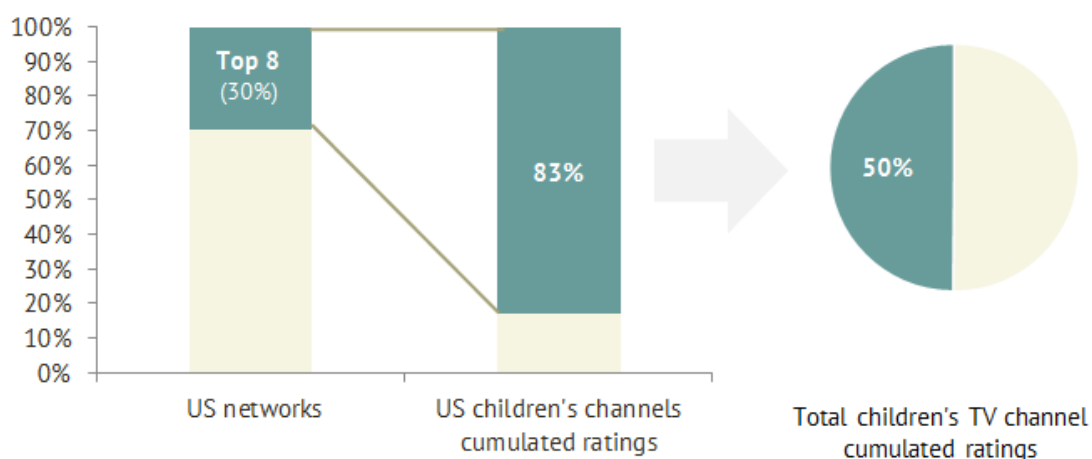
In the case of European private children’s TV channels the ratings are concentrated around Germany (31%), France (30%) and Italy (12%), which together account for over 70% of the audiences.

The national public channels’ ratings are more concentrated than the European average, with Italy (20%), Russia (20%), Spain (16%) and the United Kingdom (15%) generating 71% of total European rating points. US private channels feature a more balanced contribution closer to the pan-European, although just one quarter of the countries make up around 70% of the rating points.

In the US private category, the top eight US children’s networks, out of the 27 for which audiences were recorded, generate over 80% of the ratings registered by US children’s TV channels in Europe.

This accounts for half of the ratings accumulated by all children’s TV channels at the pan-European level. The concentration of ratings by US networks is similar to that by number of channels.

Figure 25. Top 8 US networks generate 50% of children’s TV channel ratings in Europe



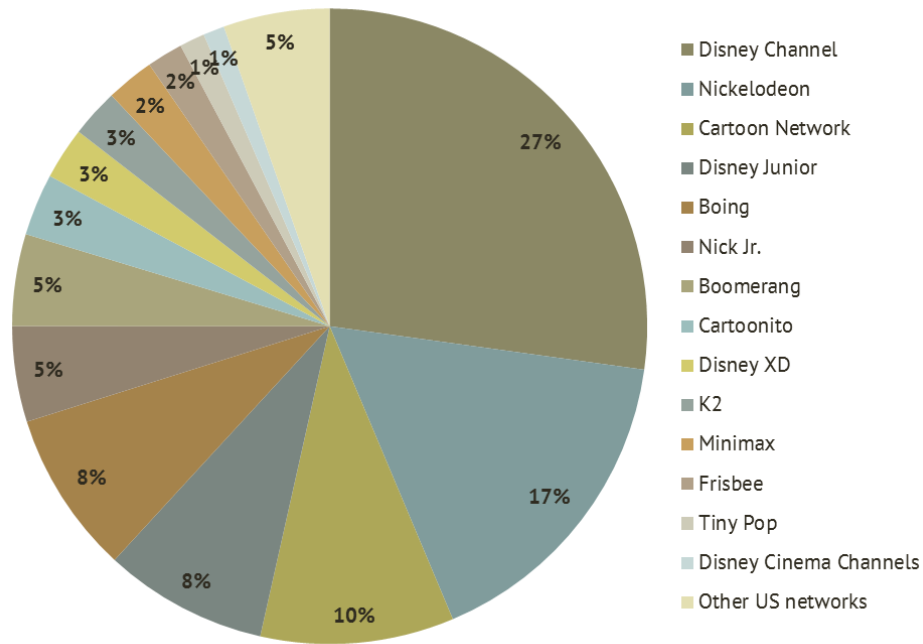
Source: European Audiovisual Observatory / Eurodata TV Worldwide

The number one US children’s TV network is Disney Channel – opted for by at least one in four people. Together with the top three, Nickelodeon and Cartoon Network comprise half of the audiences recorded by US children’s TV networks.

Compared to the supply structure there appears to be a much stronger concentration at the level of the top two US networks when it comes to rating points. This makes them outstanding performers and highlights Disney Channel as the most popular US children’s TV network.

It is interesting to note that among the top eight US children’s TV networks, Time Warner captures the same share of audiences as Walt Disney but through four networks (Cartoon Network; Boomerang; Boing and Cartoonito), rather than two (Disney Channel and Disney Junior).

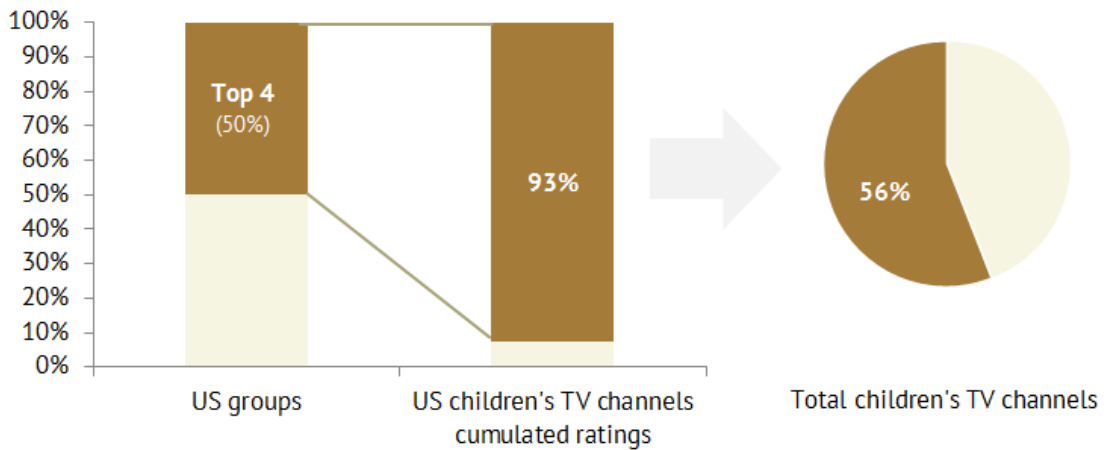
Figure 26. Breakdown of cumulated children’s TV channel ratings in Europe by US network (%)



Source: European Audiovisual Observatory / Eurodata TV Worldwide

Moreover, four out of the eight US groups for which measurements were available capture over 90% of the audiences for US children’s TV channels in Europe. At least one in two rating points going to children’s TV channels in general is captured by one of the top four US groups, namely Walt Disney, Time Warner, Viacom or AMC.

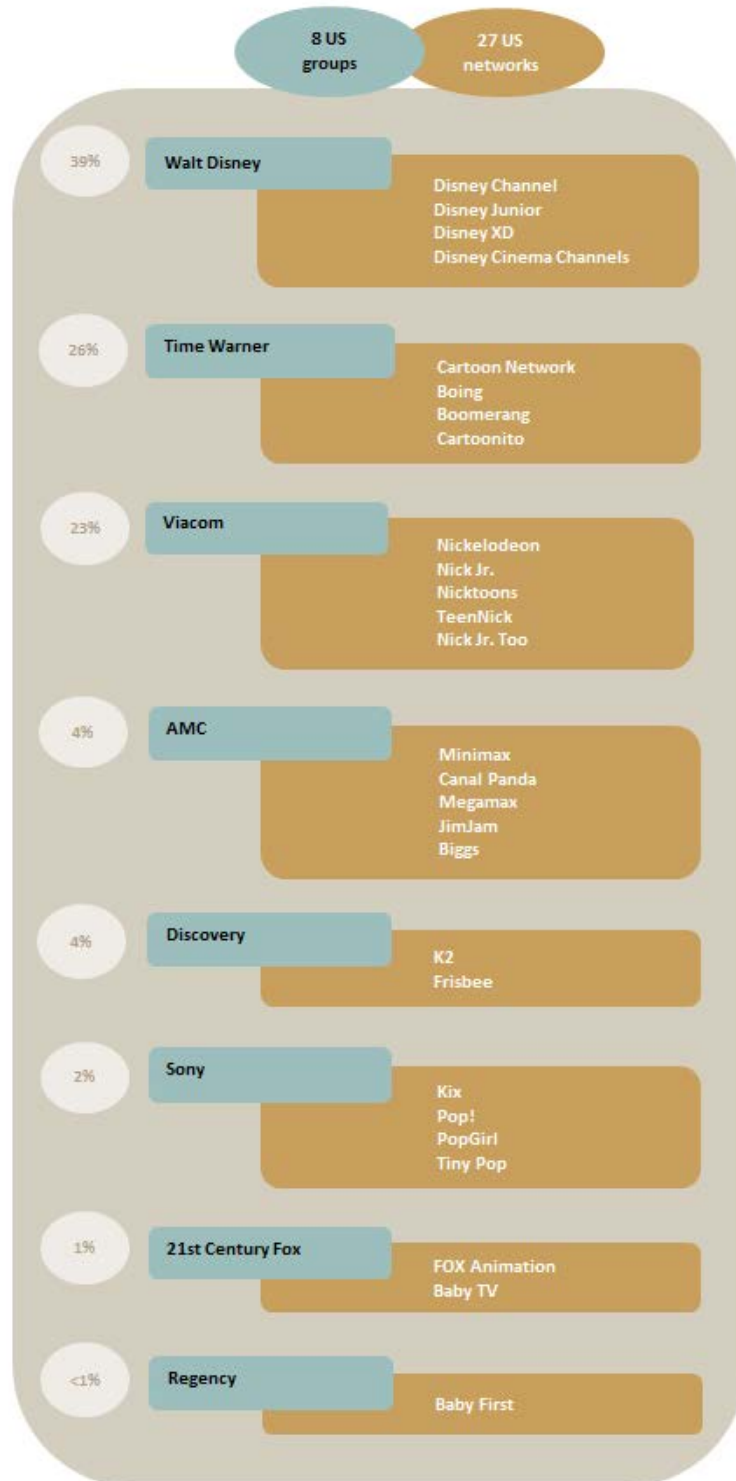
Figure 27. Top 4 US groups account for over 55% of children’s TV channel ratings in Europe



Source: European Audiovisual Observatory / Eurodata TV Worldwide

Walt Disney is the runaway leader of the top US groups and accumulates around 40% of all rating points registered for US children’s TV channels in Europe. As with the supply ranking, spot four is claimed by the AMC group, the only pan-European US group among the four with an exhaustive portfolio of European children’s TV networks.

Figure 28. Ranking of US groups and their respective networks by share of children’s TV channel ratings at pan-European level



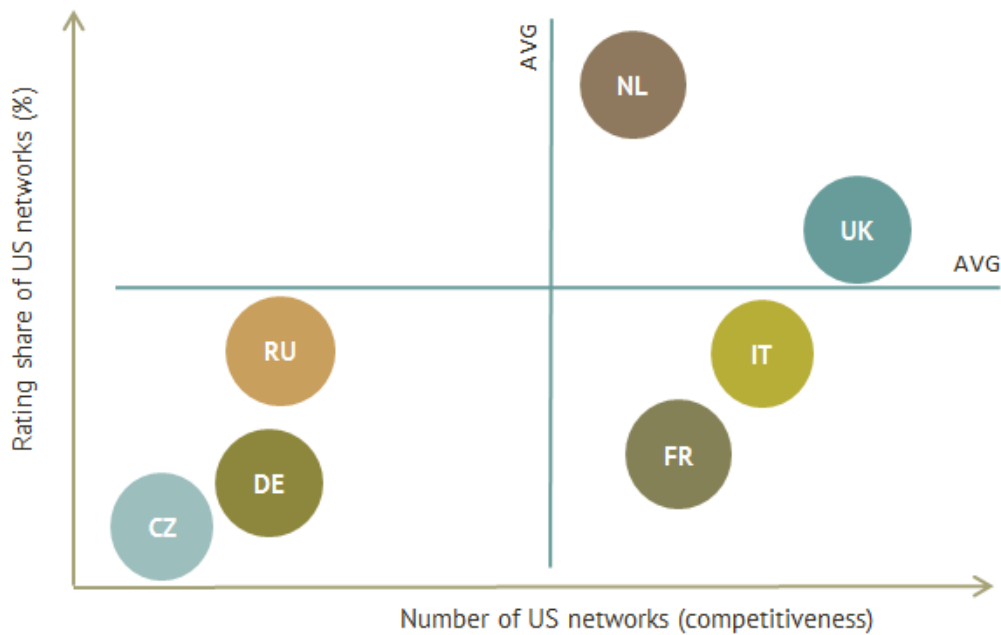
Source: European Audiovisual Observatory / Eurodata TV Worldwide

The Discovery group contributes the same number of rating points as AMC to total US children’s TV channels audiences but its business model does not allow a direct comparison with the four pan-European groups. Even though under US ownership, K2 and Frisbee operate like local channels addressing only the national Italian market, and so do not have a transnational character. K2 actually started out in Italy as a syndicated block on several local stations.

Set against this pan-European structure, the consumption landscape for children’s TV channels varies significantly from one market to another. The particular market context in terms of audiences is mainly influenced by the existence or absence of different ownership structures, consumer perception favouring either local or foreign businesses, and of course the historical viewership experience related to children’s TV channels.

In order to better highlight the heterogeneous character of the children’s TV channel audience markets, several examples have been selected based on the relative position that the US private children’s TV channels occupy in a specific country.

Figure 29. Audience markets mapped by ratings share and number of US children’s TV networks

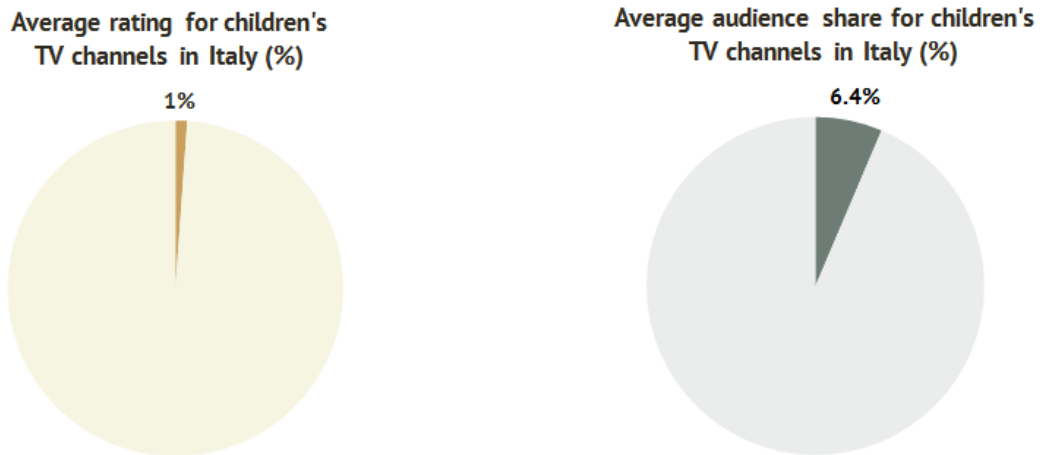


Source: European Audiovisual Observatory / Eurodata TV Worldwide

ITALY

With an average rating and daily audience share above the pan-European average, Italy is the lead market in terms of contribution to the total ratings of children's TV channels in Europe.

Figure 30. Average rating and daily audience share for children's TV channels in Italy



Source: European Audiovisual Observatory / Eurodata TV Worldwide

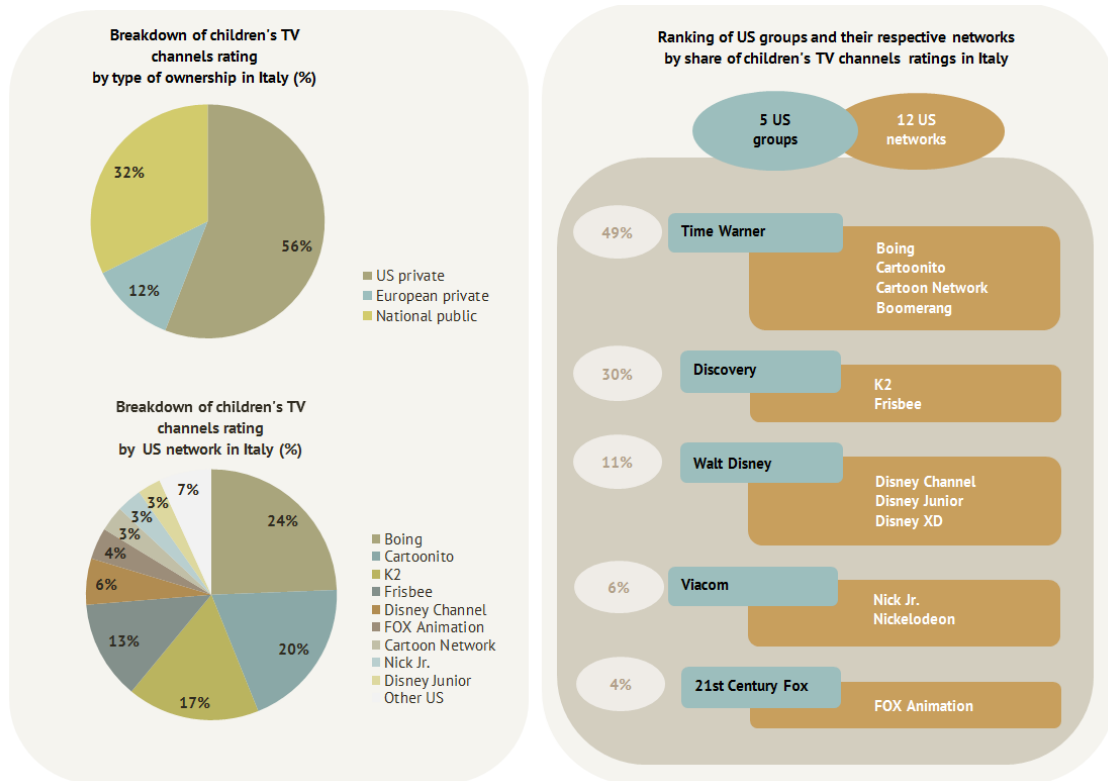
The ratings split by ownership is similar to the pan-European one but with a slightly higher share of ratings coming from national public channels cannibalising both European and US private shares.

The average share of US private ratings is influenced by the competitive landscape generated by 12 US networks, the top four of which - Boing, Cartoonito, K2 and Frisbee - capture around 75% of audiences. It is important to highlight the fact that these top four US children's TV networks are not pure US brands launched on the Italian market but rather European brands created or acquired by the US groups to specifically address key markets across Europe. Moreover, all four are free on both satellite and Digital Terrestrial Television (DTT) in Italy.

The two main US groups in Italy accumulating around 80% of market audiences are Time Warner and Discovery with the former capturing half of the US children's TV channel ratings.

The best-performing US children's TV networks in Italy are therefore the ones best adapted to the local market and which usually provide free access since they are more akin to the multi-country type of network.

Figure 31. Breakdown of children’s TV channel ratings by type of ownership in Italy



Source: European Audiovisual Observatory / Eurodata TV Worldwide

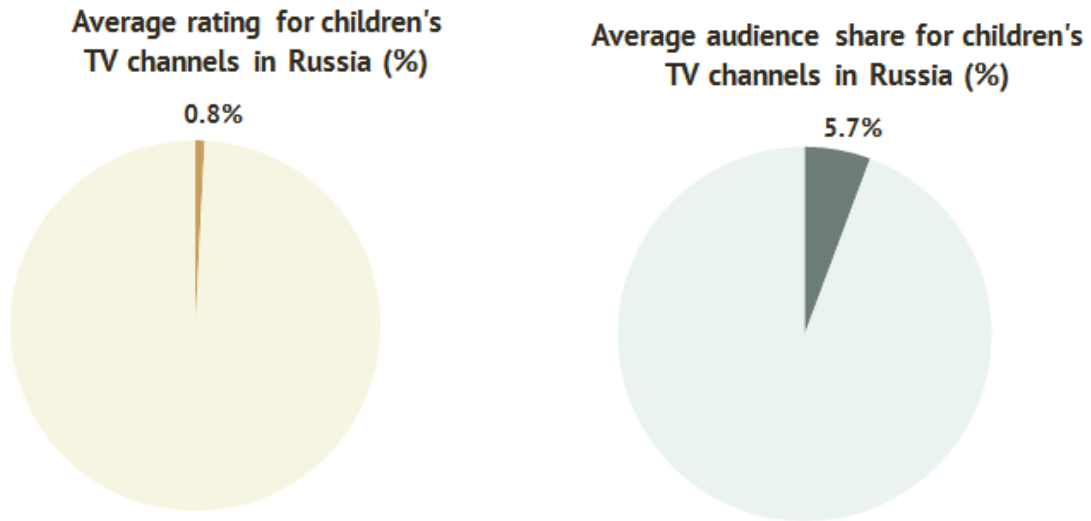
RUSSIA

Russia comes second in terms of ratings for children’s TV channels accumulated at the pan-European level. The ratings and audience share at country level are in line with the European average, with a slightly higher preference for children’s TV channels.

When compared to the European split of ratings by ownership, Russia appears to present a higher affinity for national public children’s TV channels, at the expense of European private ones. The US private children’s TV channels’ performance in terms of ratings is in line with the pan-European average but the competitive landscape is dominated by one network, namely Kanal Disney, the localised version of Disney Channel in Russia.

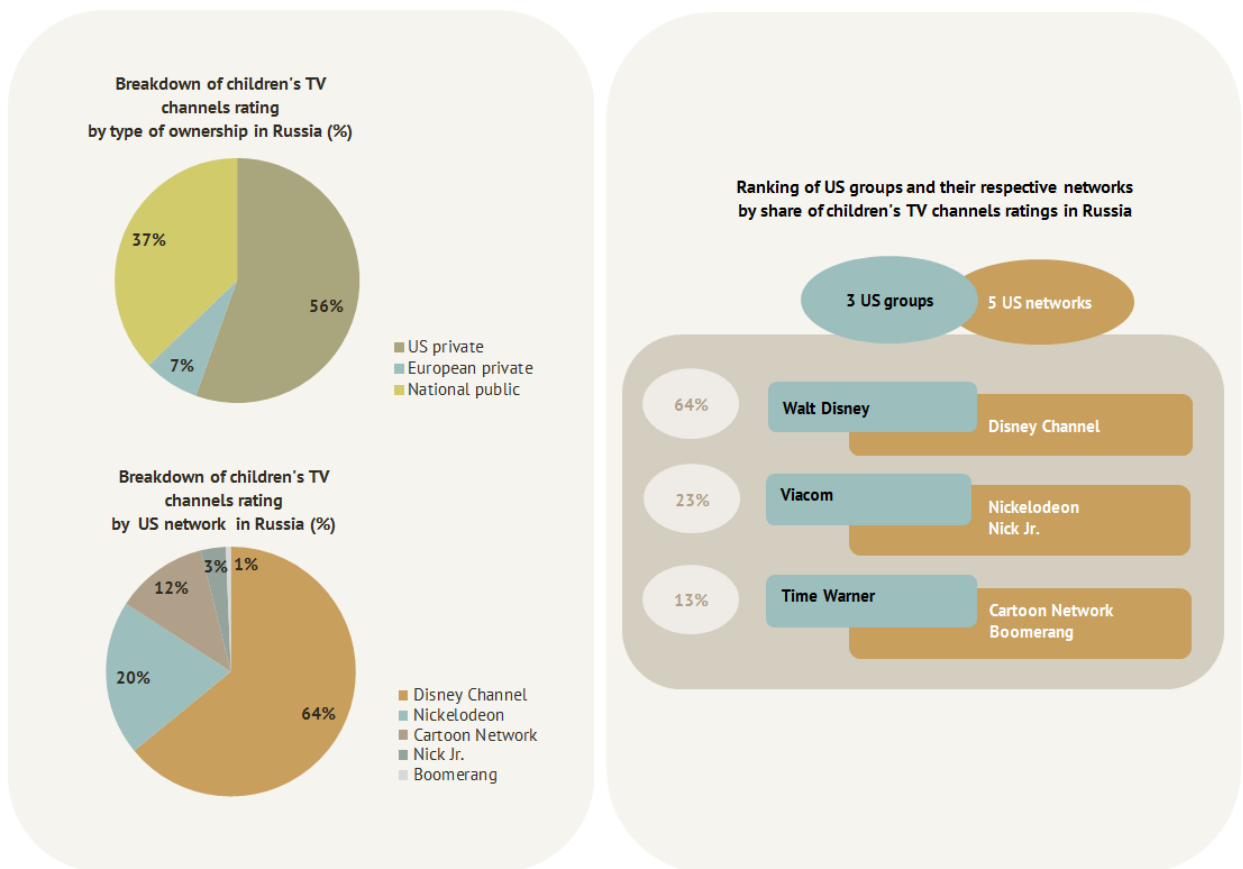
Making up 64% of the US ratings for children’s TV channels, the only Walt Disney network present in Russia captures over one third of the total children’s channel audience in the territory.

Figure 32. Average rating and daily audience share for children's TV channels in Russia



Source: European Audiovisual Observatory / Eurodata TV Worldwide

Figure 33. Breakdown of children's TV channel ratings by type of ownership in Russia



Source: European Audiovisual Observatory / Eurodata TV Worldwide

The channel is a fully localised version of the well-known US brand, is free-to-air and it was launched as a rebranding of a local channel through a joint venture with UTH Russia, which holds a 51% interest in the asset.

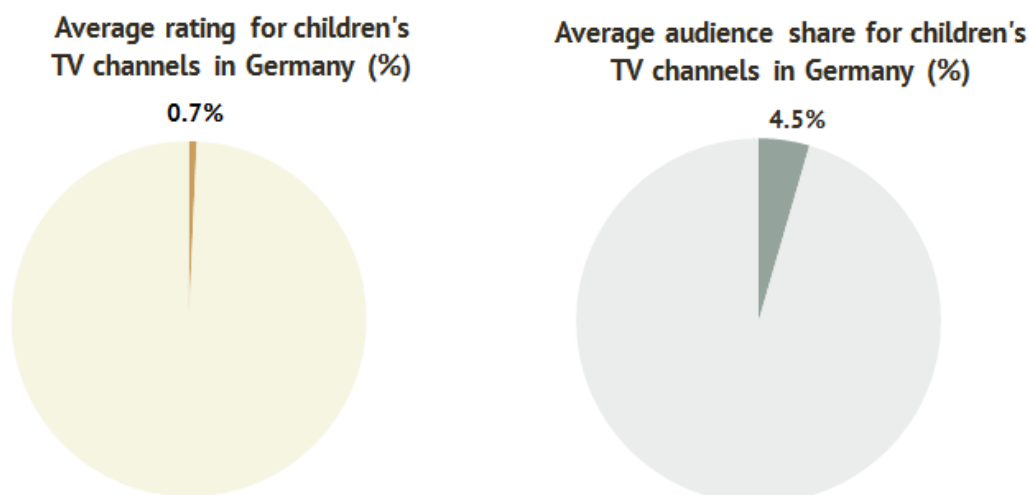
It is worth mentioning that Kanal Disney has the second-highest ratings of children's TV channels in the country, just behind Karusel at number one.

Remaining audiences for US children's channels in Russia are captured by just two US groups, Viacom and Time Warner, present with two networks each.

GERMANY

With an average rating and daily audience share slightly below the pan-European average, the German market comes third in building up the total ratings for children TV channels in Europe.

Figure 34. Average rating and daily audience share for children's TV channels in Germany

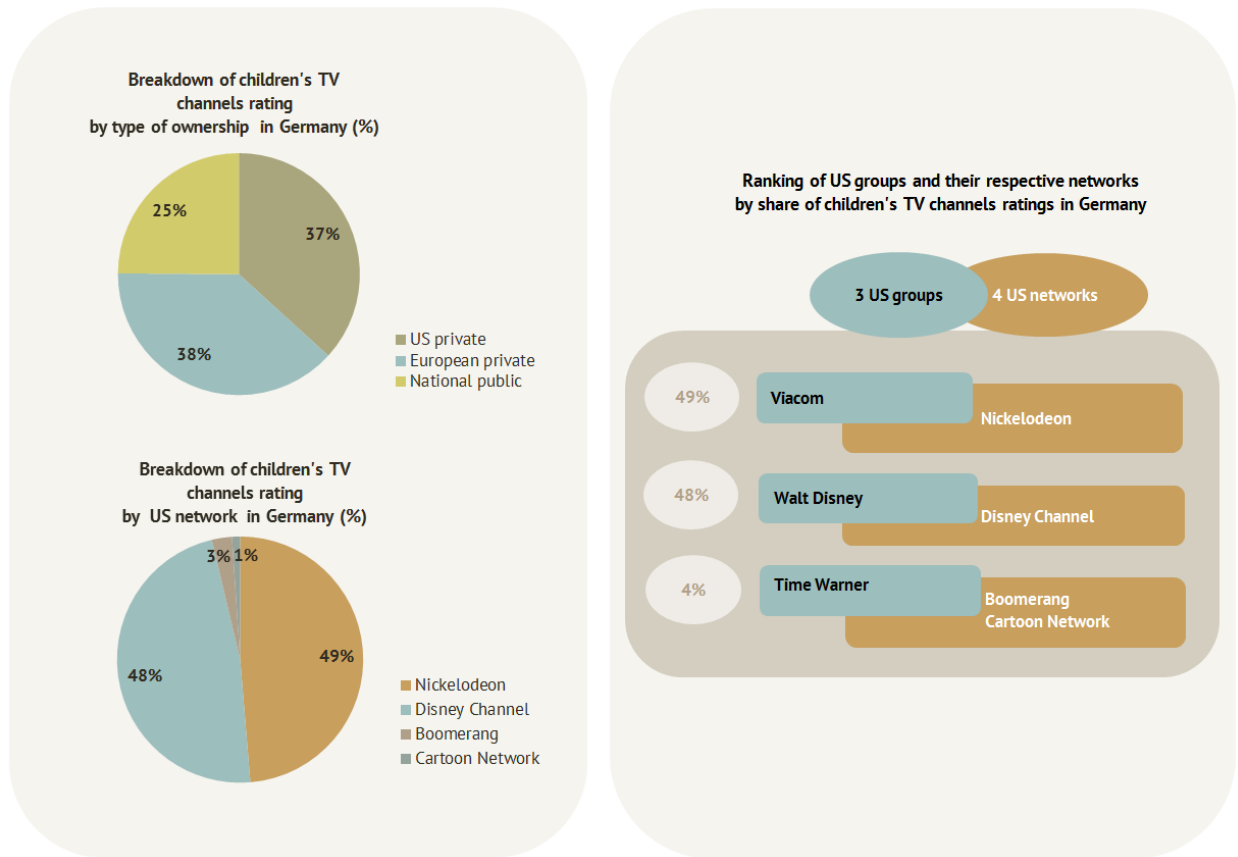


Source: European Audiovisual Observatory / Eurodata TV Worldwide

Compared to the average European breakdown of ratings by type of ownership, Germany features a much more balanced distribution between the three categories. This translates into an over-represented European private sector in terms of viewership (38%), more than double the pan-European average (15%), and with a cannibalisation of the US private channels in the process.

This performance is achieved by only one network, Super RTL, which is the number one children's TV channel in the country in terms of audience, followed by KiKA, the national public children's channel.

Figure 35. Breakdown of children’s TV channel ratings by type of ownership in Germany



Source: European Audiovisual Observatory / Eurodata TV Worldwide

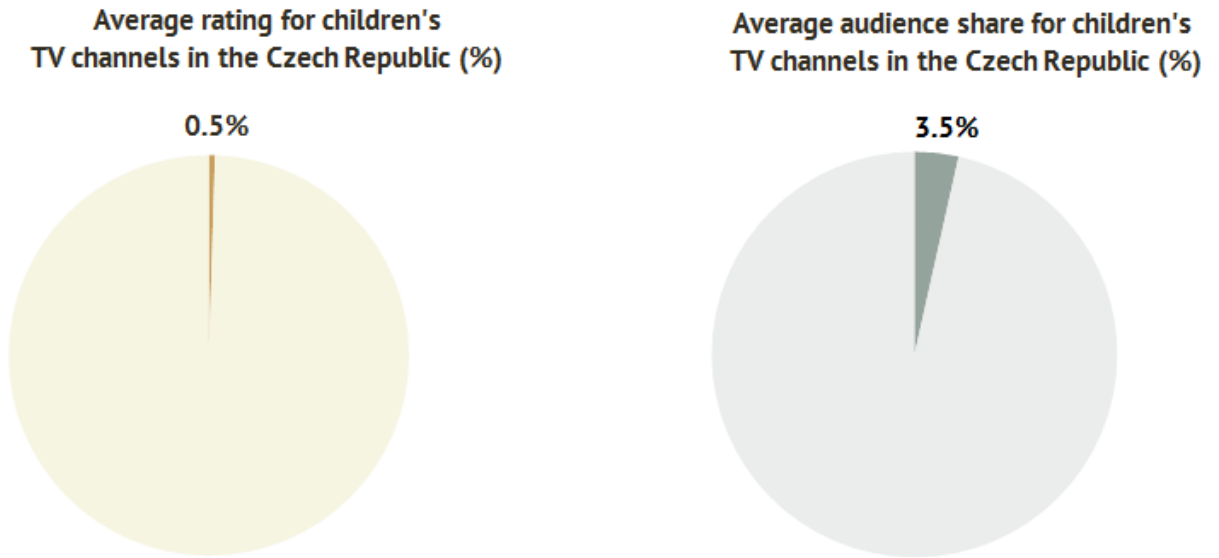
In Germany, only one in three rating points for children’s channels is going to channels of US origin, mainly to Nickelodeon or Disney Channel, as the market of American brands is equally dominated by these two networks. The same dominance is present at the US group level, leaving Time Warner, the third most significant US market player with only 4% of the viewership, divided between its two networks, Boomerang and Cartoon Network.

CZECH REPUBLIC

The Czech Republic displays a relatively weak performance in terms of ratings and daily audience share for children’s TV channels when benchmarked against the pan-European numbers.

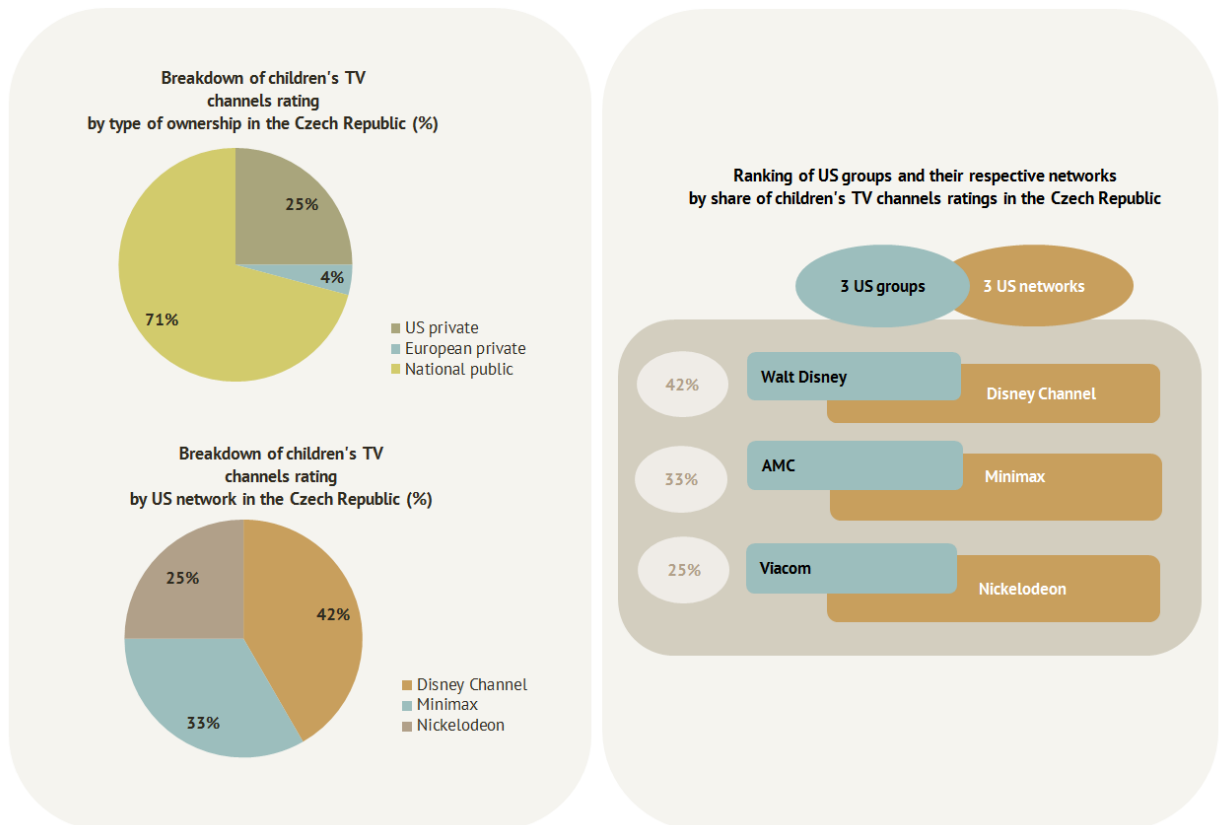
The Czech Republic’s children’s channel viewership is driven by the public sector, with a 71% rating share cannibalising considerably both European and US private channel rating shares. This performance is achieved through CT:D, the only national public children’s TV station in the country.

Figure 36. Average rating and daily audience share for children's TV channels in the Czech Republic



Source: European Audiovisual Observatory / Eurodata TV Worldwide

Figure 37. Breakdown of children's TV channel ratings by type of ownership in the Czech Republic



Source: European Audiovisual Observatory / Eurodata TV Worldwide

The US private sector is under-represented, capturing only a quarter of the children's TV channel ratings, with only three US networks present in the Czech Republic.

Disney Channel (42%), Minimax (33%) and Nickelodeon (25%) all deliver a better performance than at the European level, with Minimax recording a four-times-higher ratings share in the Czech Republic.

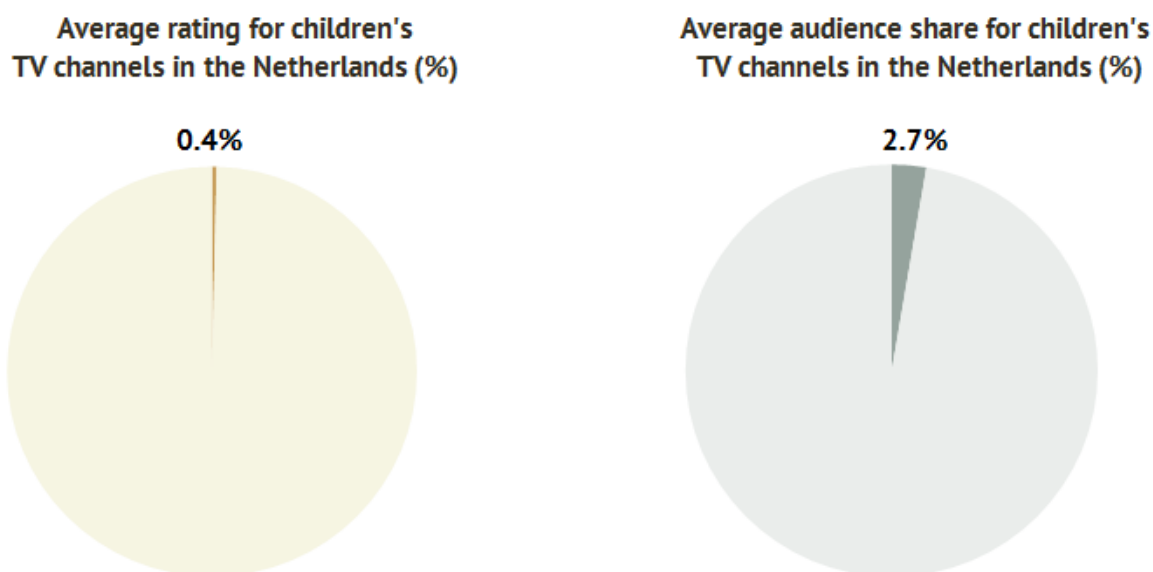
This means the AMC group is better represented by a factor eight in the Czech Republic, compared with its pan-European position, by US children's TV channels viewership.

NETHERLANDS

With an even lower performance in terms of average ratings and audience share, the Netherlands' children's TV channel arena is dominated by the US private networks, which have accumulated over 90% of children's channel viewership.

The landscape is relatively competitive, with eight US networks splitting the audiences, while the top three - represented by Nickelodeon (35%), Disney XD (23%) and Disney Channel (17%) – account for 75% of the rating points.

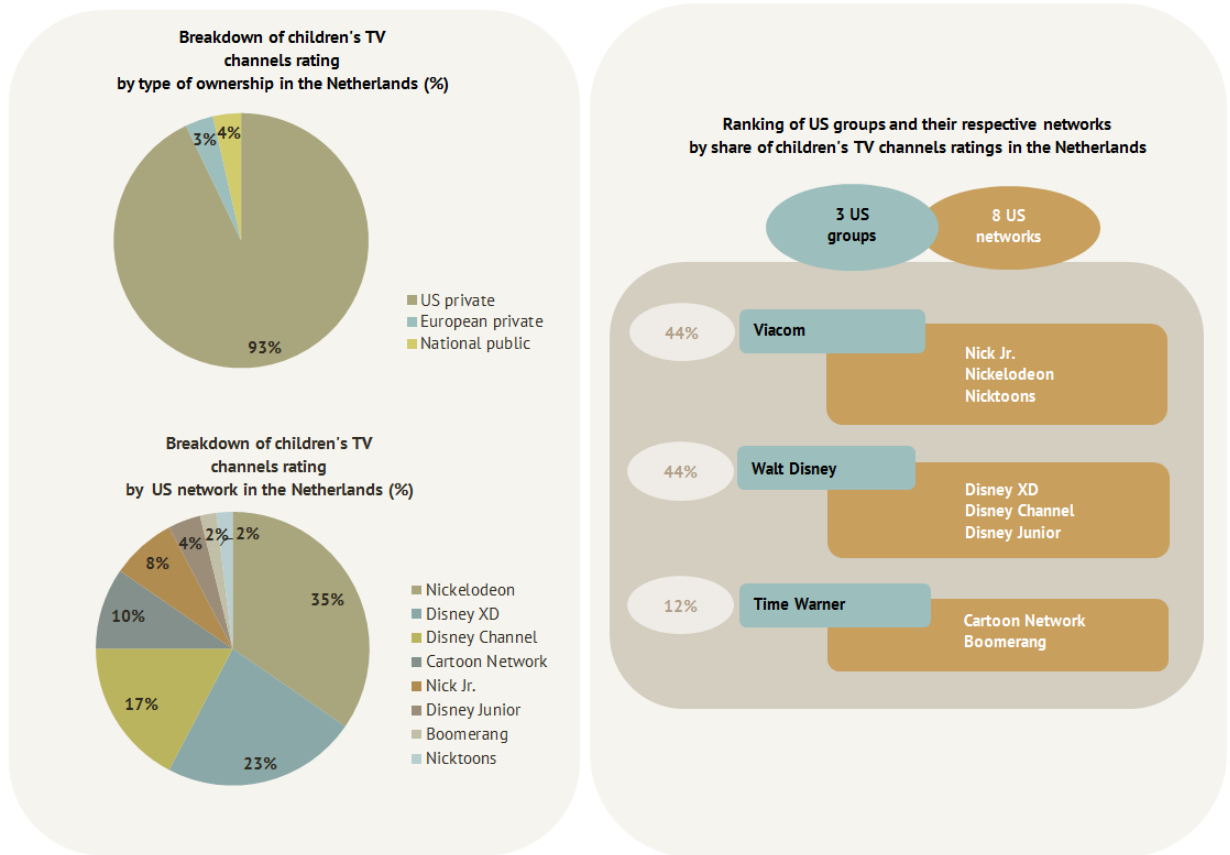
Figure 38. Average rating and daily audience share for children's TV channels in the Netherlands



Source: European Audiovisual Observatory / Eurodata TV Worldwide

At the US group level, viewership tends to become more concentrated, with Walt Disney and Viacom equally dominating the US children's TV channel market.

Figure 39. Average rating and daily audience share for children’s TV channels in the Netherlands



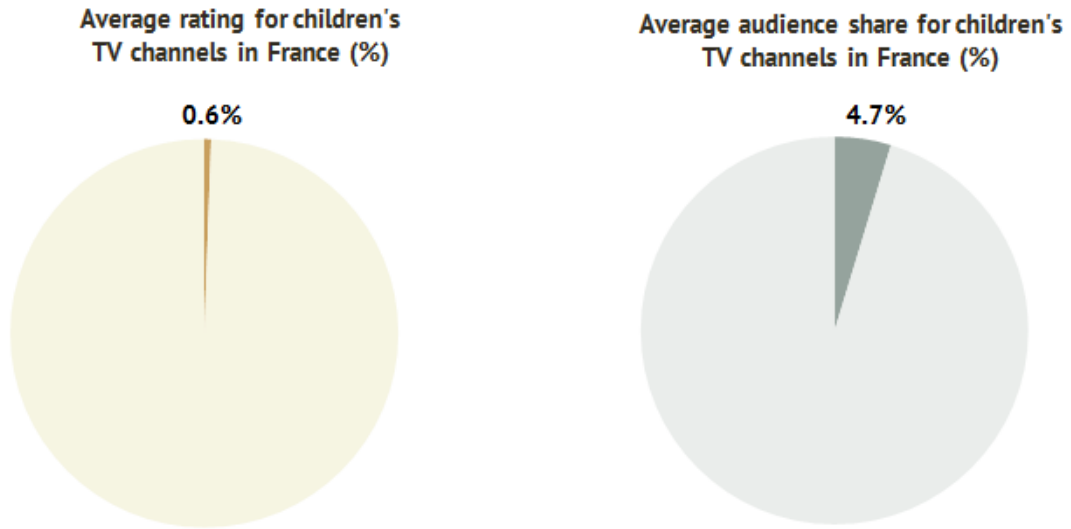
Source: European Audiovisual Observatory / Eurodata TV Worldwide

FRANCE

France ranked number six in Europe, by total ratings for children’s TV channels, with average ratings and daily audience shares slightly below the pan-European ones. In the absence of national public children’s stations, the viewership is split between European and US private networks, with the European ones dominating the market.

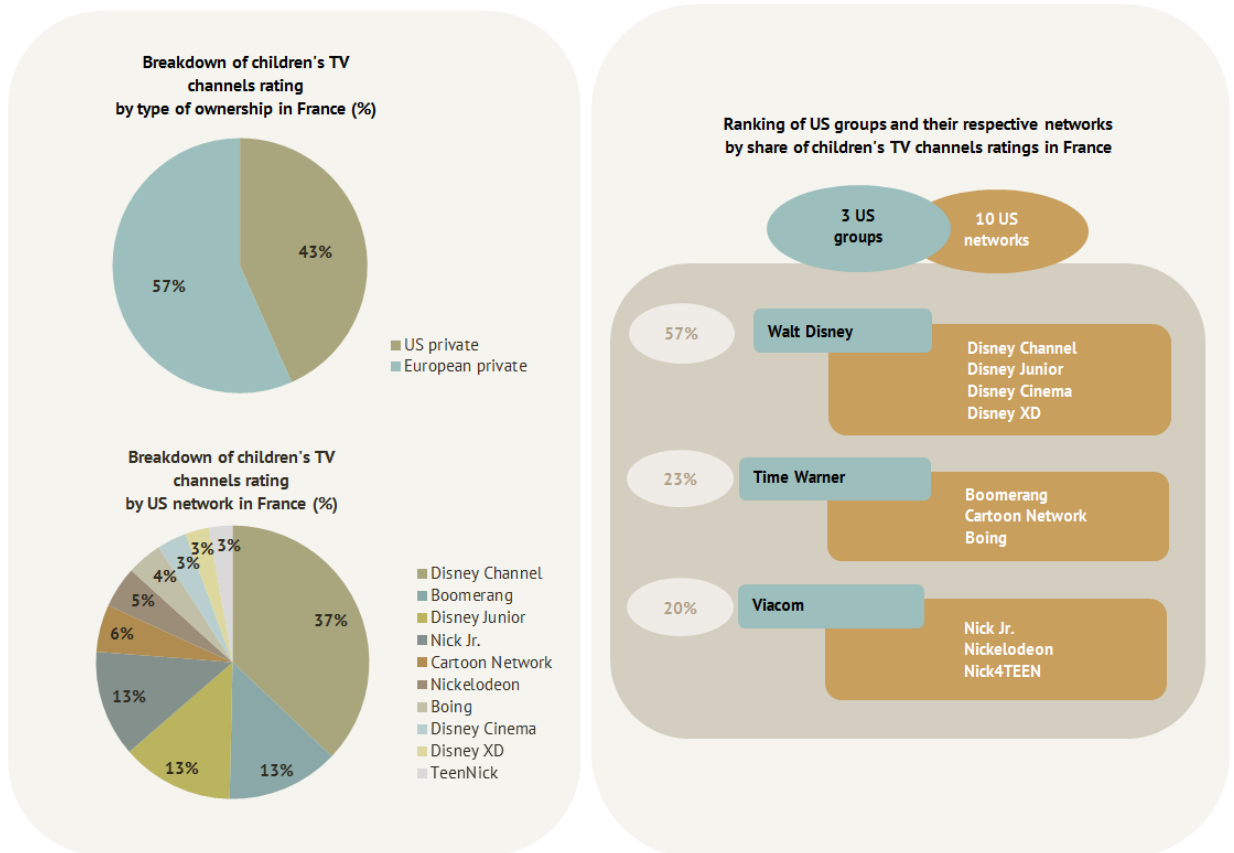
The country stands out because the European sector is driving the market by capturing more than half of the audiences, while the US sector is under-represented. Among the three European networks available on the market, Gulli accounts for over 80% of the ratings. It is important to note, however, that the channel is perceived as a national public station, since it was the product of a joint venture between Lagardère Active and France Télévisions until 2014. Moreover, the channel offers free access on DTT.

Figure 40. Average rating and daily audience share for children's TV channels in France



Source: European Audiovisual Observatory / Eurodata TV Worldwide

Figure 41. Average rating and daily audience share for children's TV channels in France



Source: European Audiovisual Observatory / Eurodata TV Worldwide

The US private sector attracts slightly over 40% of the children’s TV ratings in France and is represented by 10 networks, led by Disney Channel. The latter accounts for over one third of the US children’s channel audiences and is followed by Boomerang (13%), Disney Junior (13%) and Nick Junior (13%), which together make up another third of the market.

Walt Disney thus accounts for over half of the US children’s TV ratings in France while the rest is almost equally split between Time Warner’s and Viacom’s networks.

UNITED KINGDOM

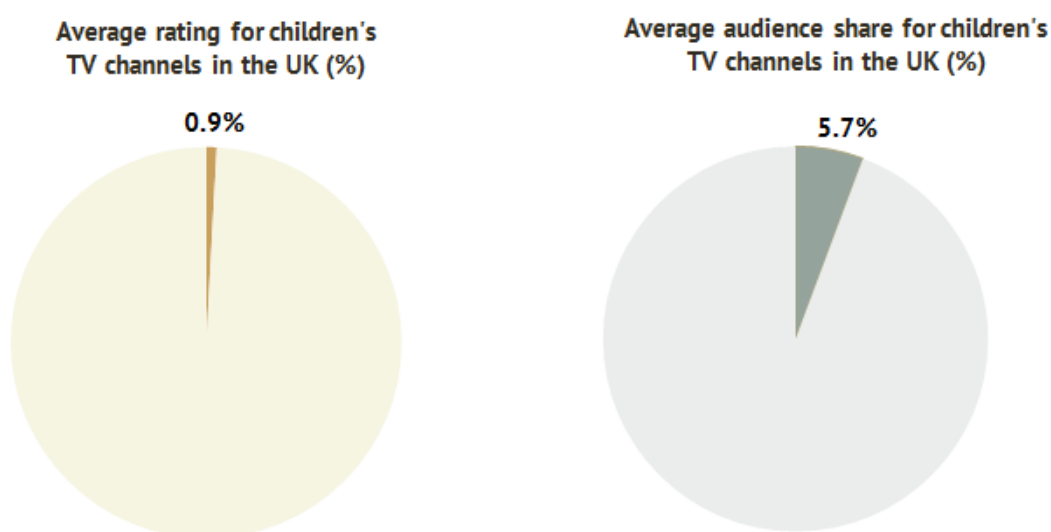
Registering an above-average performance when it comes to ratings levels and daily audience share, the United Kingdom is the fourth-most-significant market in Europe by cumulated children’s TV ratings.

The public sector is slightly better represented, capturing a third of the children’s channel viewership through its Cbeebies and CBBC networks, as opposed to the quarter share recorded at the pan-European level. This shift in the ownership structure at the country level explains the decrease in the viewership otherwise generated by the European private sector, which comprises only 4% of the ratings.

The market stands out due its highly competitive US private landscape, with the presence of no less than 15 US networks controlled by four US groups. Both the networks and the groups feature quite a balanced distribution of audiences.

From the consumption point of view, it is interesting to note that the top three US networks – Disney Junior, Nick Junior and Tiny Pop –all target pre-schoolers.

Figure 42. Average rating and daily audience share for children’s TV channels in the UK

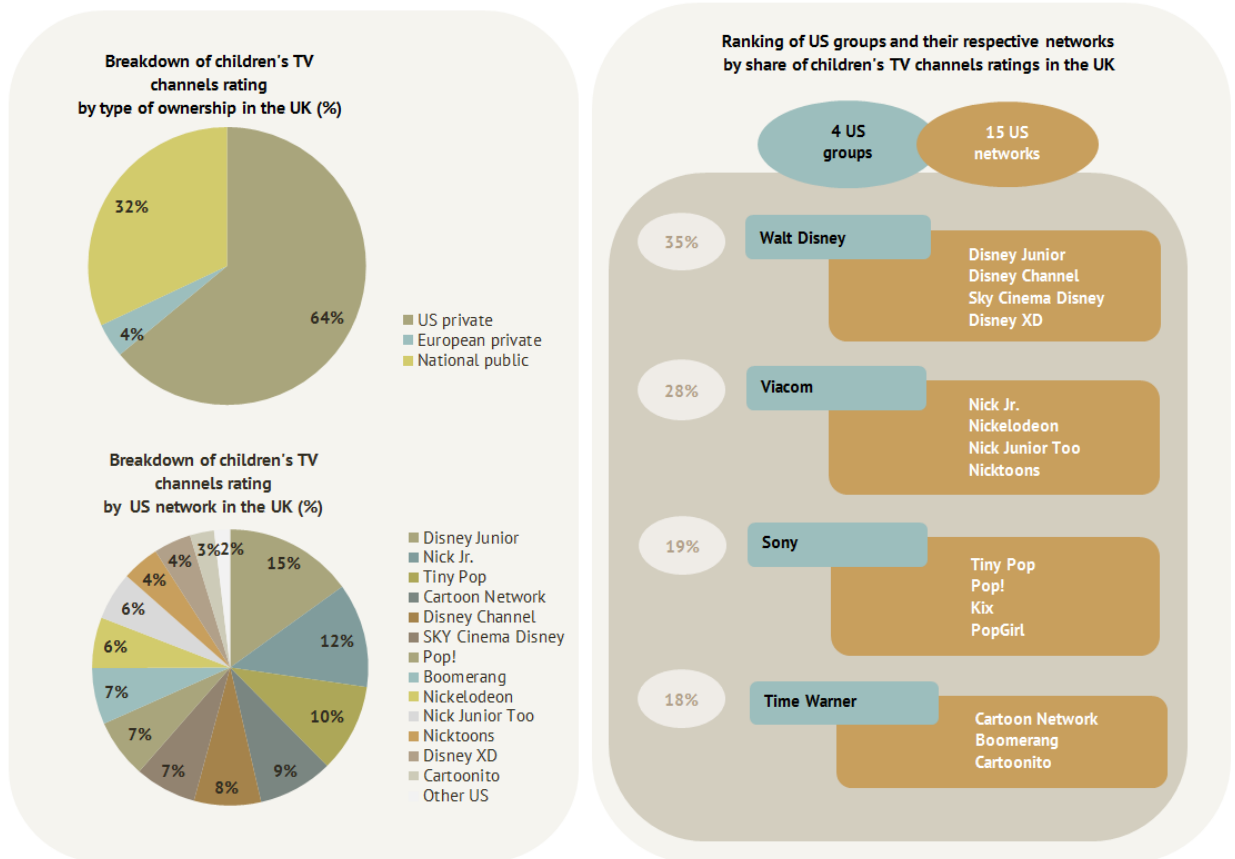


Source: European Audiovisual Observatory / Eurodata TV Worldwide

The UK is also the only territory where the Tiny Pop, Pop!, Pop Girl and Kix networks are present - because Sony is competing with the top three pan-European US groups for audiences. Due to its more localised approach, Sony manages to capture the same share of viewership as the well-known networks of the Time Warner group.

Walt Disney leads the US children's TV channel market in the UK due to the position of Sky Cinema Disney, one of the Disney Cinema channels.

Figure 43. Average rating and daily audience share for children's TV channels in the UK



Source: European Audiovisual Observatory / Eurodata TV Worldwide

4. Focus on Walt Disney, Time Warner, Viacom and AMC groups

This chapter examines four profiles of US groups controlling pan-European children's TV networks. Walt Disney, Viacom, Time Warner and AMC have been selected for this analysis as the top four US groups in Europe in terms of children's channel portfolio width and share of audiences captured in Europe.

4.1. History of the 4 groups and their expansion in Europe

Several drivers explain why US groups have added the direct exploitation of children's channels to the licensing of rights:

- The opportunity to access a higher share of added value by bypassing the European TV channels.
- A large back catalogue of rights, in some cases fully amortised, and therefore a relatively low market entry cost.
- The possibility to develop a coherent, pan-European brand strategy.

Taking advantage of the launch of digital television packages and therefore of an increase in capacity and a related decrease in transmission costs, Walt Disney, Viacom and Time Warner entered Europe in the mid-90s with their US flagship children's brands, which eventually became what we now recognise as the main transnational children's TV networks. Time Warner launched Cartoon Network in 1993 through Turner, in the same year in which Viacom launched Nickelodeon, while Walt Disney followed with Disney Channel in 1995 - launched through its broadcasting division Disney/ABC Television Group.

The 1990s also witnessed, however, the launch of European-backed children's channels with a view to target several countries. Examples include Minimax, another prominent children's TV brand launched in 1996 in the European arena, under European ownership and conceived specially to target the European market. Shortly after the launch, the channel was fully acquired by Chellomedia and integrated into its TV assets portfolio, only to become in 2014 one of the AMC group's flagship children's TV brands targeting Europe.

The first three children's networks were all launched initially in the UK where Disney Channel and Nickelodeon started as a joint venture with BskyB.

Minimax first aired in Poland and Hungary as the brand was meant to focus on Central and Eastern Europe. For all four groups, these networks remain to this day the flagships of their children's TV portfolio.

In general, the groups tried to make the best of the national market opportunities they were presented with. While we cannot identify a specific success formula for market penetration, or expansion characteristic for each group, we can underscore that each group attempted to mix direct investments in new or existing business models with joint ventures and strategic partnerships, in order to carry their brands across the borders. All of them implemented cross-border expansion through the launch of regional or local feeds together with dedicated linguistic versions and content adaptation to the local markets. A difference lies in the level of localisation that each network achieved - spanning pan-European feeds, plain dubbing, adaptation of the global to the local, and the production of original local content.

The European portfolios of the leading three US groups – Walt Disney, Viacom and Time Warner – were led by their flagship US brands and sub-brands. The portfolios were further complemented by usually one or two channels tailor-made for the European market, addressing one or two territories, and designed to capitalise on a specific local opportunity. These brand extensions conceived for the European market usually addressed the specific need either with a dedicated selection of pre-existing global content, through the sub-formatting of global productions into local ones or through the production of purely original local content. In the latter case, unsurprisingly, in certain instances the big US groups chose not to venture into this type of project alone, but rather collaborated with a local business playing an important role in either the local broadcasting or distribution arena. This explains why in the case of US networks, the brands can appear more global or local depending on the positioning and targeting strategy deployed in specific markets.

The children's networks owned today by AMC, on the other hand, followed a completely different model. They were conceived specifically for - and launched directly in - Europe. The brands did not exist previously elsewhere and the content was geared towards regional and local European productions. However, over the years, the appeal of successful US productions and the reality of cheap imported content increased the weight of the foreign acquired content on these networks too. Even so, they are still perceived by the public as being closer to the local and regional specifics or just more European than the US franchises based on Minimax's history in the region. Maybe the only US brand that comes close to this preferential perception is Disney, due to its highly localised approach from the content point of view.

The acquisition of the Chellomedia channels portfolio by AMC in 2014 should boost the competitiveness of its children's networks by increasing their production and programming value, an advantage that until now was mainly leveraged by the other US groups owning Hollywood production studios.

4.1.1. Walt Disney

Walt Disney launched Disney Channel in the UK in 1995 as a joint venture with BSkyB and through its broadcasting division Disney/ABC Television Group. Leveraging Sky's reach in the UK, the latter held a 20% stake⁷ in the brand's capital.

Disney Channel was initially launched as a premium channel in the UK so it did not benefit from broad coverage until it became a basic cable channel in 2007 together with its sister channel, Playhouse Disney, which had meanwhile launched.

The expansion of Walt Disney in Europe was accomplished mainly through the launch of subsidiaries but also through the acquisition of existing business. After entering the UK, Disney Channel started to expand in Europe by launching localised versions in France, Spain, Italy, Germany and Scandinavia. It had managed to reach up to 14 territories in Western Europe by the middle of 2000 and then made its first entrance in Central Europe through Poland in 2006. However, it was only with the acquisition of Fox Family Worldwide in 2001 that Walt Disney made a first big step in enlarging its footprint in Central and Eastern Europe. After integrating the Fox Kids network in its portfolio and rebranding it as Jetix in 2004, Walt Disney achieved full control of Jetix Europe (formerly Fox Family Worldwide) in 2008, and the Jetix channels were then renamed either Disney Channel or Disney XD depending on the previous brand presence Disney had in a specific market. This is how, in 2009, Disney Channel was rolled-out to Romania, Moldova, Hungary, the Czech Republic, Slovakia, and Bulgaria, and later in Russia, through a joint venture with a local broadcast channel which remains majority-owned by UTH Russia.

In the pursuit of local presence expansion, the group combined the establishment of several subsidiaries in key countries with multiple language feeds originating from single markets. Following this logic, there are licensing hubs for the Walt Disney children's TV channels established in the UK, the Czech Republic and the Netherlands, specific local licenses are issued in France, Germany, Greece, Spain, Italy, Turkey and Russia.

Overall, Disney's TV channel brands followed almost the same launch and expansion model: Once a brand was launched in the US it was subsequently rolled out in Europe, usually adopting the UK as a first hub to feed other countries and kick-start the expansion.

The European launches of the Disney children's TV channels thus followed the same chronology as the ones on the home market, with minor inter-market adaptations and differences. For example, Disney Cinemagic was never launched in the US, but was directly targeted at Europe. In the same way, Playhouse Disney was only a programming block on Disney Channel in the US while in Europe it was also launched as a standalone channel.

The launch of Walt Disney children's TV channels in Europe followed the following timeline:

⁷ Source: Transnational Television in Europe - Reconfiguring Global Communications Networks, Jean K. Chalaby (2009)

- Disney Channel was the first to enter Europe in 1995, 12 years after its launch in the US. It started to air in the UK and was subsequently rolled out in Europe through localised versions in the following years.
- Toon Disney, a spin-off of Disney Channel was the first to follow in 2000.
- At the same time, Playhouse Disney, which had existed only as a programming block on the Disney Channel in the US as well as in a few European countries, was launched in Europe as a standalone channel.
- Disney Cinemagic, another channel dedicated only to the European market, was launched in 2006 and replaced Toon Disney in several countries.
- Disney XD was launched in the US in 2009 and reached Europe in the same year, this time with the roll-out originating in France. This channel rebranded Jetix in several countries and replaced Toon Disney in others.
- Disney Junior was the last children TV channel to be launched by Walt Disney, as a rebranding of both Playhouse Disney standalone channels as well as of the programming blocks on Disney Channel, and it was initiated in Europe in 2011. In the US, the launch of the standalone channel came only in 2012 when the Disney Junior programming block, which replaced in 2011 Playhouse Disney on Disney Channel finally launched its own spin-off channel.

Walt Disney was involved fully, from the beginning, in localising the content through both original productions conceived for the specific national markets and adaptations of global content. These endeavours were supported on the one hand by its ability to produce strong local content and on the other hand by its vast library of film and TV fiction titles.

As the leader of family entertainment, Walt Disney promotes through its flagship station a mixture of live action and animation movies as well as series and games. Moreover, as of 2015 Disney Channel is the only major American children's cable channel that does not maintain programming for adults during the night-time as Nickelodeon and Cartoon Network do.

The channel also stands out for creating and promoting superstars out of anyone who has crossed its sound stages and for having aired commercial-free movies and series for about 15 years.

4.1.2. Time Warner

Time Warner launched Cartoon Network - its flagship TV children's brand - in Europe through one of its current operating divisions, Turner Broadcasting System. Cartoon Network is the number one US animation network and offers original and syndicated animation focused content complemented by live-action series and motion pictures for youth and family. The collaboration with Warner Bros. is intended to drive TV channels portfolio success while broadening exposure through the production of original animated programming based on the studio's characters and brands.

Cartoon Network was launched in 1993 in the UK making it the first US children's channel to be launched in Europe. Unlike Disney Channel, it started out as a European satellite feed which became a UK- and Ireland-specific version only in 1999.

Initially, the station split the frequency with TNT during the night and the programming was skewed to animation and relied mainly on the Hanna-Barbera library, complemented by MGM and Warner Bros. productions. The channel subsequently slightly changed the format and became more contemporary but remained animation-driven when Boomerang was launched as the classic animation channel, taking over the majority of Cartoon Network's animation shows.

Time Warner opted for joint ventures in the case of specific channels such as Boing in order to support the distribution coverage of the station and the content localisation. In this case, the partnership was concluded with Mediaset both in Italy and Spain, the largest commercial broadcasting network in these countries. This type of engagement was more skewed towards the multi-territory operations model.

The launch and expansion model for Time Warner children brands in Europe also followed more or less the same model. The channels were first launched in the US and subsequently rolled out in Europe following the home market chronology:

- Cartoon Network expansion in Europe started, as noted, with a generic pan-European feed that was gradually broken down into country-specific channels: in 1994 Cartoon Network launched local audio tracks for specific markets but it was not until 1999 that the pan-European feed started to actually split into localised feeds addressing specific regions and countries. In the meantime, Cartoon Network became the first children's channel focused on animation to air 24 hours per day.
- Previously a block on Cartoon Network in the US, Boomerang was launched in 2000 and reached Europe in the same year, through the UK, taking Cartoon Network's positioning and most of the programming and thus becoming the classic animation channel. Regional and local feeds started to develop soon after and expanded throughout Europe, until recently, but rather focused on language localisation than actually creating or adapting content to the local markets.
- The third children's TV network to be launched was Toonami, an action-oriented channel that only existed as a programming block on Cartoon Network in the US. As a standalone channel, it was launched in the UK in 2003 and closed after four years after a series of changes, only to be re-launched in 2016 in France (for now the only country in Europe where the channel is airing).
- Cartoon Network Too was launched specifically for the British market but was transformed in 2014 into the time-shifted version of Cartoon Network, which replaced Toonami.
- In 2004, Time Warner launched Boing as another brand targeting Europe and it was the first free children's TV channel to air 24 hours in Italy. It started on DTT and by 2009 became free on satellite as well. Boing is Turner's general children's entertainment channel targeting seven to 14 year-olds and it shares in Italy the majority of audiences with its sister channel, Cartoonito, which is also free on both distribution types. The channel was expanded to France one year after the launch and reached Spain by 2010. Following the Italian model of a joint venture with Mediaset, the channel is available on free DTT in Spain and started as a programming block on

various Mediaset commercial channels before being spun off as a standalone channel. Both in Italy and Spain, where the channel operates as a joint venture with Mediaset, the programming includes local live-action shows, contests and series, making Boing the most country-specific brand among Turner's children's channels in these countries.

- Cartoonito, initially a pre-school programming block on Cartoon Network Too, was launched as a standalone channel, directly in Europe, in 2007, replacing the old Cartoon Network Too slot. It thus became yet another channel directly targeted at Europe, this time addressing pre-schoolers in the UK and Italy, where the channel benefits from free access on both satellite and DTT.

Compared to Disney's content strategy, that of Turner appears less geared towards local content (except maybe for Boing), and more towards localisation through language, advertising integration and targeted programming selections from the global libraries, depending on the regional or local audience specifics.

As regards licensing, Time Warner deployed a more concentrated licensing approach than Walt Disney, by using the UK as virtually the sole hub for Europe, rather than setting up local franchises.

4.1.3. Viacom

Following the same penetration strategy used in 1987, when it launched MTV, Viacom chose not to bring Nickelodeon to Europe on its own, in order to minimise the risks and increase the distribution coverage potential. This is why in 1993 Nickelodeon came to the UK, like Disney Channel, as a joint venture with BSkyB, which in this case held 50% of the brand's assets.

Nickelodeon is Viacom's flagship brand for children's TV channels, part of the Nickelodeon Group managed by Viacom Media Networks alongside two other brand groups: BET networks and the Music and Entertainment Group.

After Nickelodeon's local version launched in the UK the brand expanded to Germany in 1996, rolled out a pan-Scandinavian version, and then, in 1998, launched a pan-European feed. Nickelodeon closed in Germany, facing strong competition from what we now know as KiKA, and continued to air its programming on Super RTL until its re-launch as a standalone channel in 2005. In the early 2000s, Nickelodeon started to further invest in local programming and progressively replaced the pan-European feed with fully localised channels in Spain, the Netherlands, Turkey, Portugal, France, Austria and Poland. By 2008, it had managed to cover most European territories with strong distribution in the UK, Ireland, Benelux, Germany and Austria.

From the licensing point of view, Viacom more closely resembles Walt Disney than Time Warner: it is established in several European hubs like the Czech Republic, the Netherlands and the UK for the regional and local feeds, and has obtained special licenses in big countries such as Germany, Italy and Spain.

Nickelodeon offers a more balanced mix of animated and live-action series programming. Even though the content may, over time, have appeared more appealing to young teenagers than children, Nickelodeon's extended target includes pre-schoolers, and its current positioning involves further engagement of children .

After Nickelodeon, Viacom continued the children's portfolio development:

- The spin-off Nicktoons originally started in 2002 as Nickelodeon's brand for cartoon blocks. Nicktoons reached Europe in the same year, through the UK, and later expanded to Germany, the Netherlands, Flanders and Ireland. In Germany, it replaced Nick Premium, a channel launched in 2007 which featured TeenNick shows and some of 90s shows.
- A new addition to the portfolio came under the name of Nick Jr., a brand originally used to name the preschool program block on Nickelodeon in the US since 1988. The Nick Jr. spin-off replaced Noggin in 2009, a standalone channel in the US. Sister channel TeenNick was launched at the same time, replacing the N channel, which initially split the frequency with Noggin. TeenNick was also originally launched as a programme block on Nickelodeon in 2001.
- Nick Jr. was actually launched as a standalone channel in Europe many years before. Starting out as a programming block on Nickelodeon UK in 1993, it was spun off in 1999 into its own channel and later expanded to other European countries.
- Nick Jr. Too, another channel launched directly in Europe in 2006, targeted the UK and Ireland and was designed to compete initially with Cartoon Network Too. In time, the channel became more than just a time-shifted version of Nick Jr. by having its own schedule and featuring some original content.
- TeenNick arrived in Europe only in 2014 when it was launched in France under the name Nickelodeon 4Teen. The channel targets primarily teenagers and expanded to Italy the following year.
- Nick Music, the latest addition to the Nickelodeon Group portfolio, was launched in the US in 2016, replacing MTV Hits. However, the channel was primarily launched in the Netherlands as Nick Hits in 2007 and was rebranded in 2017 following the US launch of Nick Music.

With minor local exceptions, Viacom's children's portfolio followed the same launch and expansion logic as its direct competitors, meaning that the main brands were in principle first launched in the US and subsequently in Europe, with more or less the same timeline. At the same time, the dedicated European brands were usually launched to address one or two local markets.

4.1.4. AMC

The strongest competition faced by US children's TV networks in Europe when it comes to pan-European networks is Minimax. Launched in the late 1990s in Hungary and Poland, the channel rapidly gained popularity and audiences respectively, initially by leveraging as its main competitive advantage the local and regional specifics of its content, a characteristic that could not be matched at that time and in those countries by the global networks. With

the aim of building a small Central-European empire, Minimax initially allocated up to 75%-80% of its broadcast time to European programming, with 20%-25% coming from Eastern Europe, including some legacy productions from the Communist era, which had completely disappeared after the 1980s. Its original 100% ownership by a local company also benefited the brand in Hungary, where it appeared more trustworthy in terms of public perception, in a market dominated by foreign companies, even if its commercialisation strategy was just as aggressive. Another big differentiator leveraged by the brand was the promise of non-violent content.

In time, as local and regional children's content became in general highly expensive in the light of much cheaper foreign programming available for import, even Minimax initiated a shift towards US productions.

Minimax started to expand relatively fast after the launch through local feeds in Romanian, Czech, Serbian and Slovenian, thus covering significant territories in Central and Eastern Europe such as Hungary, Romania, Moldova, the Czech Republic, Slovakia, Serbia, Croatia, Montenegro and Slovenia; the Polish channel was discontinued after five years.

These premises already position Minimax in a different category from its competitors, not only ownership-wise, but also as the first transnational network launched directly in and for Europe without leverage of a well-known global brand, equity or previous experience with sister channels.

In 2007, Chellomedia, the content division of Liberty Global, gained full control of Minimax by acquiring the remaining 50% interest in the brand, following an initial acquisition in 2004, making the channel a US network by ownership. Originally an American cable company, Liberty Global remained more concentrated on the distribution business through its other division represented by UPC Broadband. The absence of a production unit didn't help in the competition with the other children's TV brands, obliging the company to rely mainly on acquired programming rather than Hollywood studio back-up.

Chellomedia complemented what is today a strong portfolio of popular children's channels through a series of acquisitions and joint ventures targeting specific regions in Europe. Another of their channels that started in Europe almost at the same time as Minimax, but addressed the Iberian peninsula instead, was Panda Club, which was rebranded within a year to Canal Panda. It was the first cable TV channel for children to address Portugal and Spain and in the beginning the brand was partly owned by a subsidiary of ABC/Disney Group. Chellomedia entered a strategic partnership with NOS, the well established distribution platform in Portugal, in 2009 by creating Dreamia, a joint venture designed to operate a portfolio of channels including Canal Panda and a sister children channel launched in the same year: Panda Biggs.

Completing the series of strategic acquisitions regarding children channels, Chellomedia acquired the JimJam channel in 2007 through a joint venture with Hit Entertainment and became sole owner by 2010. The channel was initially launched in Italy in 2006, the roll-out across Central and Eastern Europe happened in the two months after the acquisition, and Switzerland and the Netherlands were accessed by 2008. Conceived as an international channel it was ultimately expanded to almost 60 territories in Europe, the Middle East and Africa (the EMEA region), with seven feeds, 13 language versions and four

localised versions. For example, Polsat JimJam was launched as a joint venture with Polsat Group.

The latest addition to the Chellomedia children TV channels portfolio was Megamax, launched in 2011 as a sister channel of the flagship brand. The channel was launched in Hungary and then expanded in Romania, the Czech Republic and Slovakia, through localised language and advertising.

From the licensing point of view, the channels tended to be established within the European region for which they were initially created. Thus, Canal Panda Portugal and Biggs are licensed in Portugal, Canal Panda Spain in Spain, the JimJam licenses are held by the UK hub, and the Minimax and Megamax licenses are provided by the Czech Republic hub, with only one exception: Minimax Hungary - which remains licensed in the target country.

In 2014, Chellomedia was fully acquired by AMC Networks, a US media conglomerate dedicated to producing quality programming and movies which also owns and operates several of the most popular brands in cable television around the world. Chellomedia was rebranded to AMC Networks International.

Following the initial targeting logic, the children's channels portfolio is now managed under three separate divisions of AMC Networks International in Europe, namely Central Europe for Minimax and Megamax, Iberia for Canal Panda and Biggs, and Zone (EMEA) for Jim Jam.

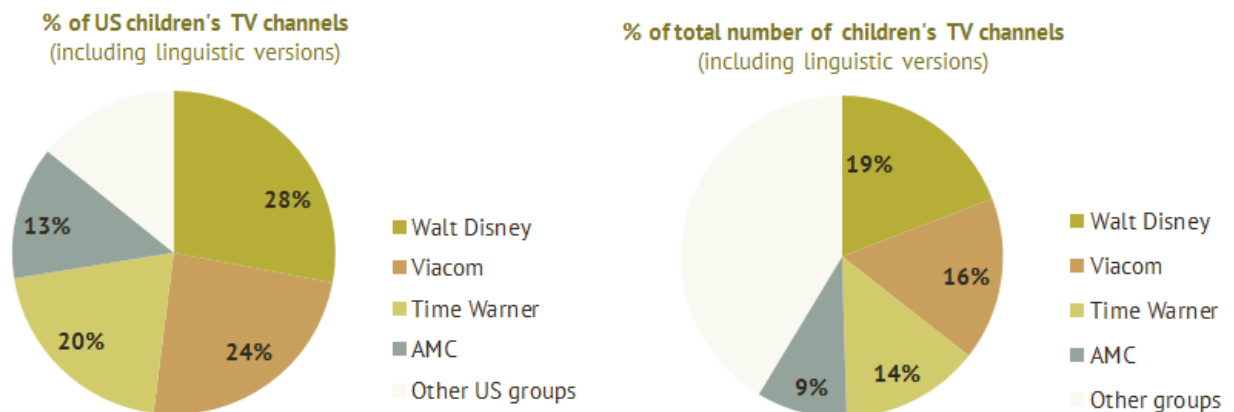
AMC's expansion strategy in Europe is therefore aimed at disseminating all its original successful programming on what it is now a much larger, global platform of well-established assets. Moreover, the group is also investing in a strong distribution strategy by developing joint ventures and entering strategic partnerships with subscription television platforms around the world, such as United Group, Slovak Telekom, Skylink, Magyar Telekom, Beeline, NTV+, Virgin, Telekom Austria, A+E Networks International and others. This expansion strategy is complemented by the launch of local feeds meant to replace the European ones, which have already proved to have a high audience turnover in the Baltics, a region on which AMC is focusing at the moment and intends to further develop in the future through its two flagship channels, Minimax and AMC.

4.2. Mapping the top 4 US groups on the European children’s TV channel landscape

SUPPLY

Walt Disney, Viacom, Time Warner and AMC, ranked in this order, are the top four US groups by number of channels (portfolio width) controlling the main transnational children’s TV networks in Europe. Accounting for 85% of the US children’s TV channels in Europe, including linguistic versions, these groups contribute with around 60% to the overall supply of children TV channels in Europe. In other words, three out of five children’s TV stations in Europe is owned by one of the four US groups while one in five is controlled by Walt Disney.

Figure 44. Share of children’s TV channels owned by one of the top 4 US groups (%)



Source: European Audiovisual Observatory / MAVISE database

US groups manage on average five different networks. The portfolio structure of each group varies, however, in terms of linguistic version availability for any specific US network.

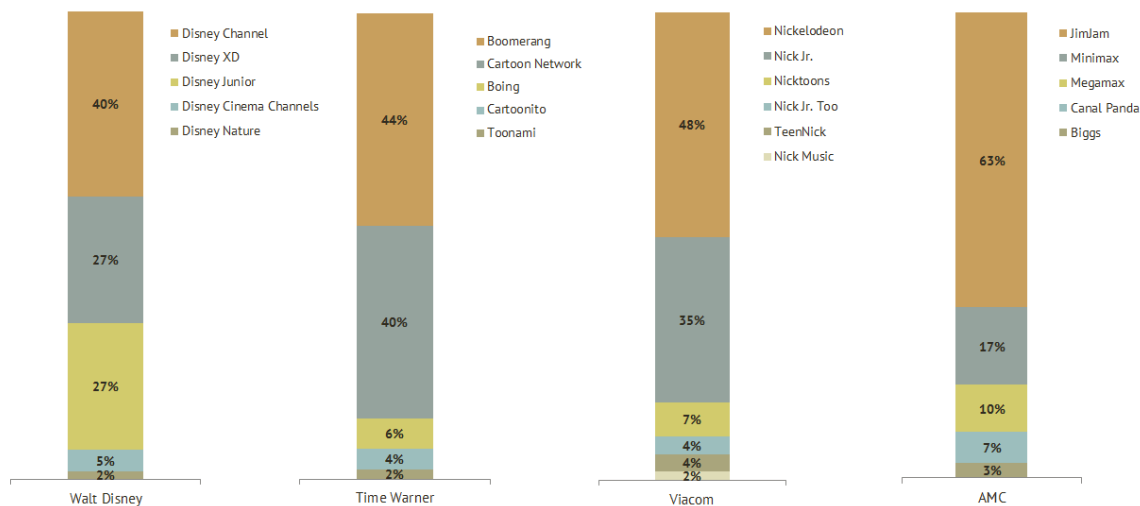
In this regard, Walt Disney appears to have a more balanced portfolio structure when compared to the other groups; it is the only one featuring an almost evenly developed range of linguistic versions for three of its networks: Disney Channel, Disney XD and Disney Junior. This picture corresponds to Disney’s strong focus on content localisation.

At the other pole, AMC stands out with a concentration of over 60% of its children’s TV channel portfolio under the JimJam network, which was conceived and launched as a purely international network targeting EMEA. The other children’s brands in the AMC portfolio were intended to address more specific areas and thus have a rather regional (Central and Eastern Europe) or multi-country presence (Iberia).

The Time Warner and Viacom portfolio structures are relatively similar: by two networks that benefit from an extended range of linguistic versions and thus have in both

cases accumulated over 80% of the children’s TV channels at group level. These linguistic versions are concentrated around Boomerang and Cartoon Network for Time Warner while for Viacom, Nickelodeon and Nick Junior are the most localised networks.

Figure 45. Breakdown of children’s TV channels by US network at US group level (%)



Source: European Audiovisual Observatory / MAVISE database

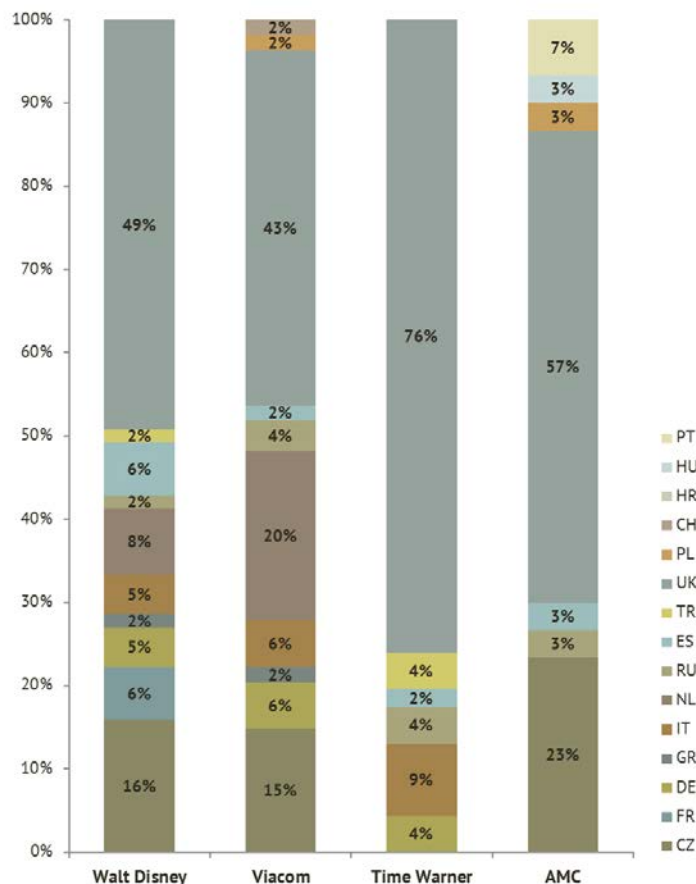
As seen in the previous section, all of the groups also hold in their portfolio niche European children’s TV networks conceived and launched specifically to address several key markets in Europe.

Disney Cinema channels were launched only for Europe and are present in no more than three territories, namely France (Disney Cinema), Germany (Disney Cinemagic) and the United Kingdom (Sky Cinema Disney), while Disney Nature only broadcasts in France. Following the same logic, Boing, Cartoonito and Toonami are standalone networks launched directly on the European market by Time Warner to address not more than three and two territories, and one territory, respectively. Nick Junior Too is a European brand addressing only the United Kingdom and Ireland, while Nick Music, which only targets the Netherlands and TeenNick, which is only present in France and Italy, are US brands launched in Europe to tackle key markets. Nick Music, however, first started as Nick Hits, which was a brand launched directly in Europe by Viacom. Even in the case of AMC, where all the networks are originally European, Canal Panda and Biggs were strategically launched to address only two territories, and one territory, respectively.

Similar to the pan-European breakdown of children’s TV channels by country of establishment, the United Kingdom, the Czech Republic and the Netherlands stand out also in the context of the top US groups as the main licensing hubs in Europe. However, their representation tends to vary across the different US groups and also when benchmarked against the pan-European breakdown.

Figure 46. Children’s TV channel supply structure for the 4 US groups by country of establishment

Weight of children’s TV channels (%)



Source: European Audiovisual Observatory / MAVISE database

Walt Disney and Viacom appear to have the most heterogeneous establishment structure, with up to 10 countries issuing licenses for their children’s TV channels, a broadness designed to support the expansion of the leading two US portfolios as well as foster a high localisation level. Time Warner and AMC follow with six and seven licensing territories, respectively, due principally to the more relaxed localisation strategy applied by the former and the regional administrative organisation and market approach deployed by the latter.

Among the top three licensing hubs, the United Kingdom stands out as the main country of establishment for Time Warner’s portfolio, covering over two thirds of its children’s TV channels, a share well above the pan-European average. The country remains the primary licensing hub by share of TV channels under its jurisdiction for the other three groups as well, although slightly under-represented in the case of Walt Disney and Viacom compared to the European average breakdown.

Only Walt Disney, Viacom and AMC have children’s TV channels established in the Czech Republic, with AMC displaying a greater affinity for this country of establishment

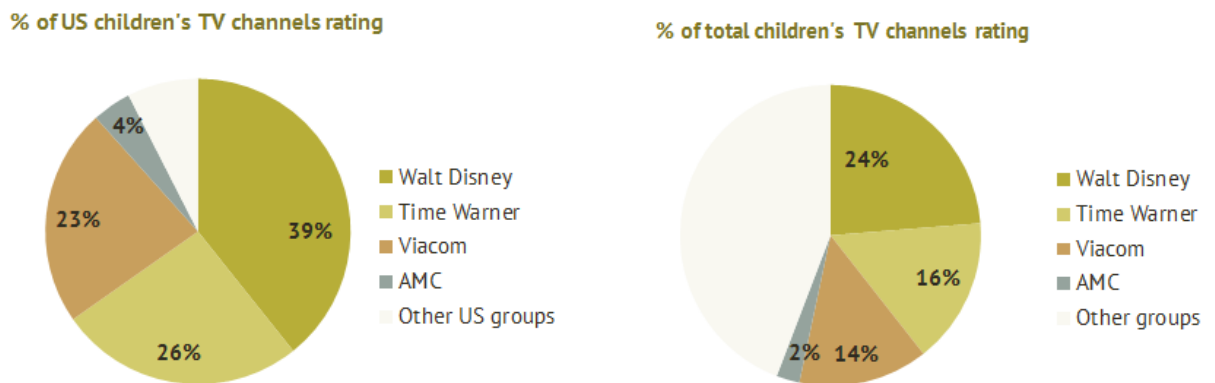
compared to the other groups because it is home to the Minimax and Megamax networks, which address Central and Eastern Europe with localised versions.

The Netherlands issues licenses only for Walt Disney’s and Viacom’s children’s TV channels and is particularly well represented in the case of Viacom, with a share three times higher than the pan-European average.

AUDIENCES

Walt Disney, Time Warner, Viacom and AMC are the top four US groups by cumulated children’s TV channels viewership in Europe. Although the ratings registered by the K2 and Frisbee networks at the European level place Discovery in the same position as AMC, Discovery does not qualify as a pan-European or transnational group for the purposes of this comparative analysis.

Figure 47. Rating shares for children’s TV channels of the 4 US groups (%)



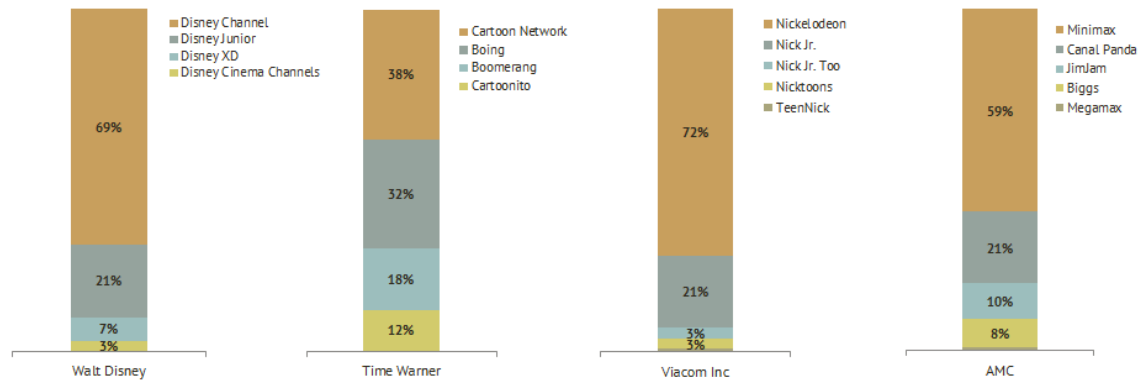
Source: European Audiovisual Observatory / Eurodata TV Worldwide

Even if the same four groups top the chart also in terms of audiences, the ranking changes slightly when compared to the one by number of channels: Viacom and Time Warner swap places.

Comparing the breakdown by ratings with the one by number of channels, Walt Disney and Time Warner stand out due to a better performance in exploiting their portfolio. This is how Time Warner manages to become second runner-up in terms of audiences, even with a smaller portfolio than Viacom.

AMC has a much higher portfolio market share (9%) than viewership share (2%) at the European level. This may evolve as AMC may increase the share of original programming on its channels. At group level, Time Warner stands out with a more balanced distribution of ratings across its networks. This picture is different from the model featured by the other groups, where one flagship pan-European network drives the audiences by contributing 60%-70% to the total ratings while the remaining three to four networks comprise only marginal viewership.

Figure 48. Breakdown of children’s TV channel ratings by US networks at US group level (%)



Source: European Audiovisual Observatory / Eurodata TV Worldwide

Cartoon Network, Time Warner’s flagship network by positioning, is being cannibalised on the one hand by more localised networks such as Boing and Cartoonito, and on the other hand by Boomerang, which is basically the repository for Cartoon’s classic animation shows. Boing is the most country-specific children’s TV network owned by the group and it registers a very strong performance in Italy and Spain where it is present as a joint venture with Mediaset – the well-established commercial broadcasting network – and can be accessed for free on both DTT and satellite. Cartoonito’s performance in Italy also benefits from free access to the channel. Boing and Cartoonito are actually the second and third most significant children’s TV channels in Italy, ranked between two public children’s channels, Rai Yoyo and Rai Gulp.

The pre-school networks such as Disney Junior and Nick Junior contribute to a similar degree to the Walt Disney and Viacom performance, accounting for one fifth of their children’s TV channel ratings.

In the AMC portfolio, on the other hand, such pre-school networks, namely Canal Panda and JimJam, generate almost one third of the audiences at group level mainly due to Canal Panda’s success in Portugal as a highly localised network.

Biggs is also an exception when compared to preschool networks from the other groups’ portfolios, as it is highly localised, is only present in Portugal, and contributes considerably to the group’s overall rating.

Table 2. Top 10 children’s TV channels of the top 4 US groups in Europe by rating

TV channel	Country	Ownership	Access
KANAL DISNEY	RU	Walt Disney	Free
BOING	ES	Time Warner	Free
DISNEY CHANNEL	ES	Walt Disney	Free
NICKELODEON	DE	Viacom Inc	Free
BOING	IT	Time Warner	Free
DISNEY CHANNEL	DE	Walt Disney	Free
DISNEY CHANNEL	RO	Walt Disney	Pay
CARTOONITO	IT	Time Warner	Free
NICKELODEON	PL	Viacom Inc	Pay
CARTOON NETWORK	RO	Time Warner	Pay

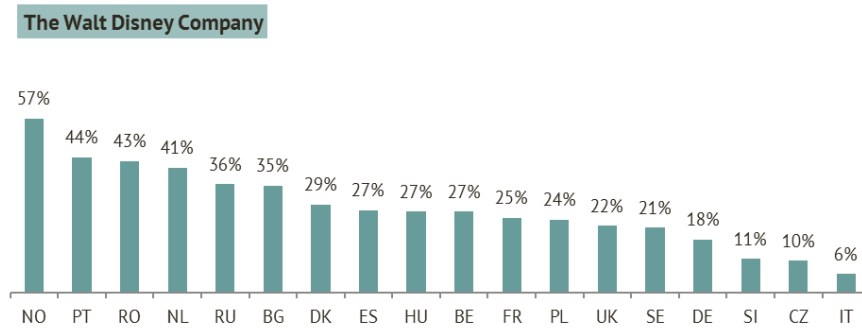
Source: European Audiovisual Observatory / Eurodata TV Worldwide

Among the top 10 children’s TV channels owned by the four US groups, Walt Disney is present with four channels (all under the Disney Channel network), Viacom is represented only in two territories, with Nickelodeon, while Time Warner is present with three networks, Boing, Cartoonito and Cartoon Network, covering four territories. This helps explain the more balanced distribution of Time Warner’s ratings across its portfolio networks and also the fact that networks that are highly localised tend to perform better in terms of audiences, and therefore rank higher in the chart.

At country level, the groups’ rating shares vary significantly between different markets and in comparison with their pan-European weight:

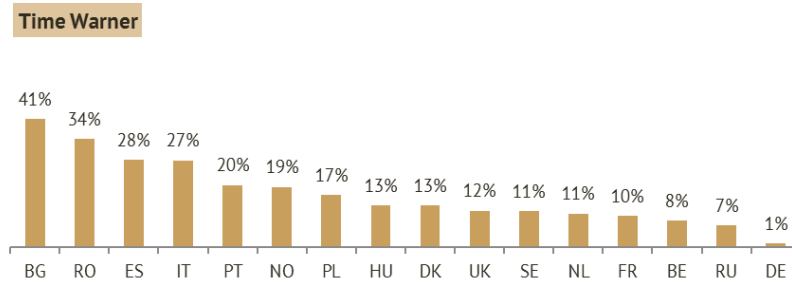
- Walt Disney’s children’s TV networks tend to be very popular in markets such as Norway, Portugal, Romania, the Netherlands, Russia and Bulgaria, while capturing a smaller audience share in Italy, the Czech Republic and Slovenia.
- Time Warner manages to attract more audiences in Bulgaria, Romania, Spain and Italy, while its networks are less preferred in Germany, Russia, Belgium and France.
- Greece, Ireland, the Netherlands, Hungary, Belgium and Switzerland display a greater preference for one of Viacom’s children’s TV networks than countries such as Spain, Italy, the Czech Republic, Denmark or France.
- The AMC children’s TV networks tend to be a top choice in markets such as Slovenia, Hungary and Portugal whereas in Spain this preference falls below the pan-European average.

Figure 49. Walt Disney ratings share of total children’s TV channel ratings by European market (%)



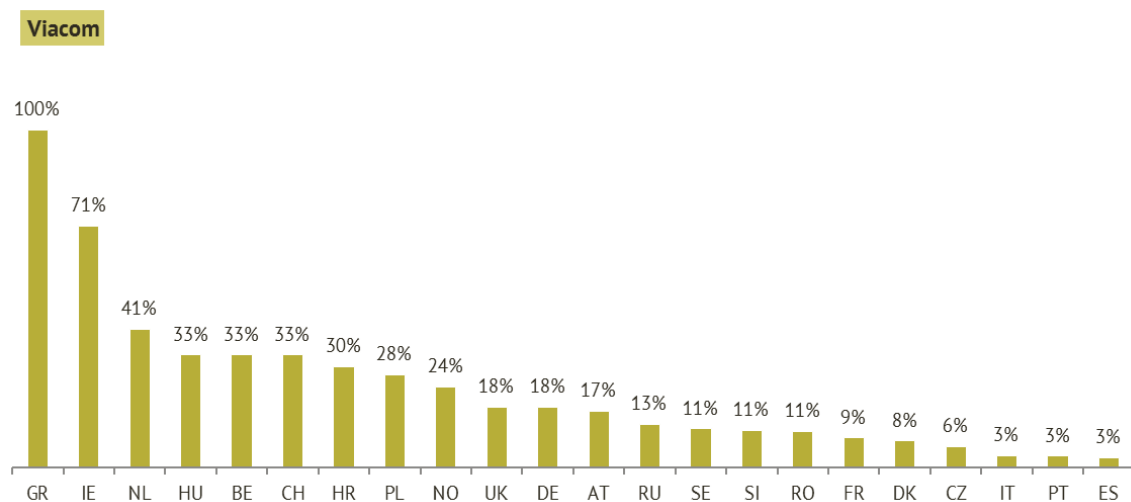
Source: European Audiovisual Observatory / Eurodata TV Worldwide

Figure 50. Time Warner ratings share of total children’s TV channel ratings by European market (%)



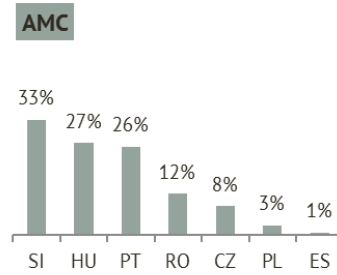
Source: European Audiovisual Observatory / Eurodata TV Worldwide

Figure 51. Viacom ratings share of total children’s TV channel ratings by European market (%)



Source: European Audiovisual Observatory / Eurodata TV Worldwide

Figure 52. AMC ratings share of total children’s TV channel ratings by European market (%)



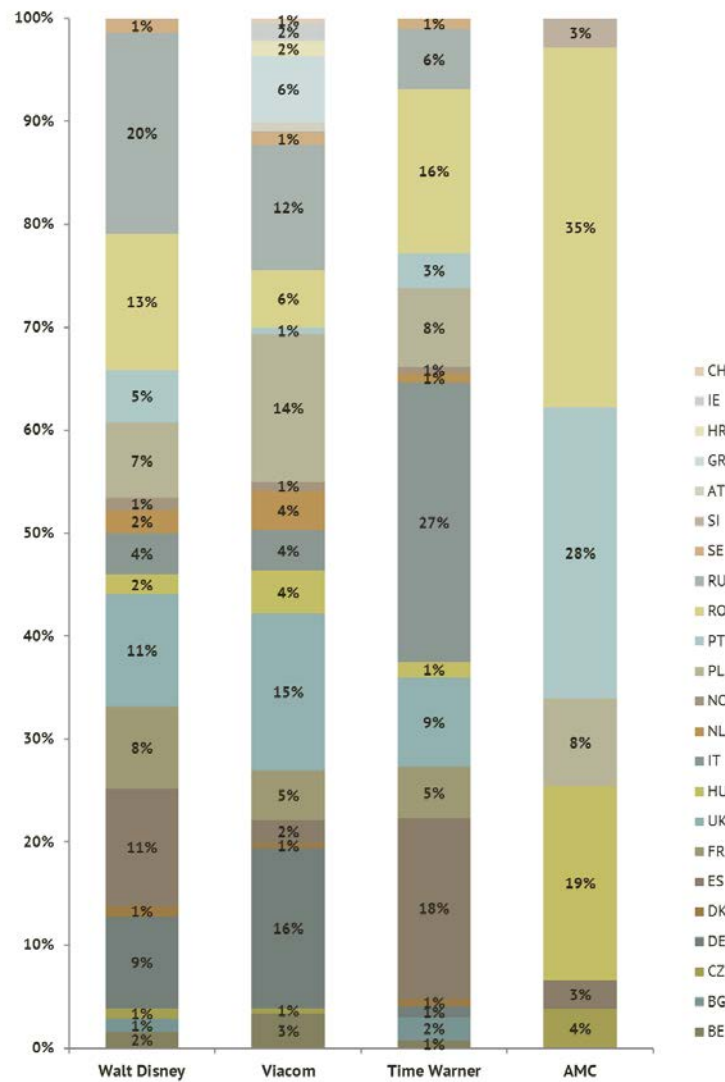
Source: European Audiovisual Observatory / Eurodata TV Worldwide

With regard to the markets’ contribution to the European children’s TV ratings make-up, the top four US groups feature heterogenous audience structures.

Among the 17 markets where ratings were recorded for Walt Disney’s children’s TV channels, the group mainly relies on Russia, Romania, the United Kingdom, Spain, Germany and France to build up its pan-European audiences, as these six markets represent over 70% of the ratings. The top four markets alone account for 55% of Walt Disney’s total pan-European ratings.

For Viacom’s children’s TV channels, too, more than half of the ratings are concentrated in the top four markets, while the top six capture more than 70% of the European ratings for this group. The remaining audiences are, however, more widely spread, as Viacom registers ratings in a total of 23 markets.

Figure 53. Breakdown of children’s TV channel ratings by market at US group level (%)



Source: European Audiovisual Observatory / Eurodata TV Worldwide

Time Warner presents a more concentrated structure, with the top three markets, Italy (27%), Spain (18%) and Romania (16%) delivering over 60% of total European ratings for its children’s TV channels, while the top six markets account for over 80% of its pan-European audience. The other three markets are the United Kingdom (9%), Poland (8%) and Russia (6%).

Finally, AMC has a total of seven markets contributing to its pan-European performance in terms of children’s TV channel viewership, with the top three markets – Romania (35%), Portugal (28%) and Hungary (18%) – accounting for over 80% of the group’s ratings. It is worth mentioning that these are mainly delivered through the performance of Minimax in Romania and Hungary, and Canal Panda in Portugal.

4.3. Mapping the top 4 US group's portfolios of pan-European children's TV networks

US groups have, over time, developed a heterogeneous portfolio of children's TV assets, each addressing specific needs and designed to broaden the market segment targeted.

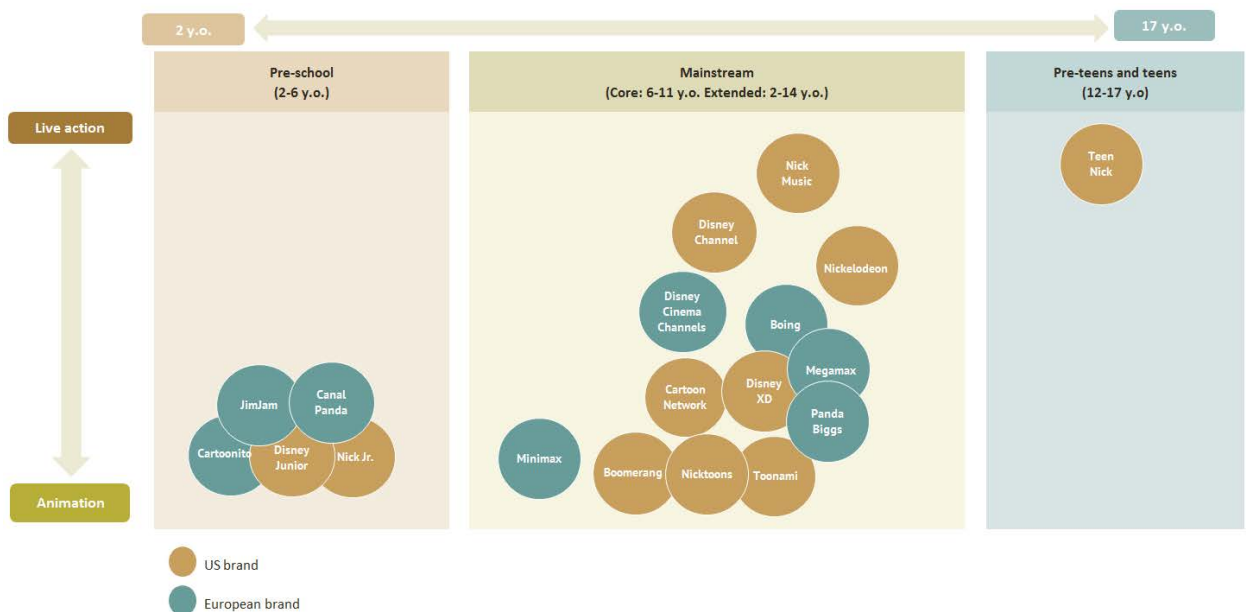
However, there are certain similarities in the portfolio strategies. Several main profiles of children's TV brands developed and fostered by each of the four US groups can be identified, by criss-crossing demographics, type of content and the brand's market of origin.

Between declared target segments, actual consumption and consumer perception, which cannot be easily elucidated at this point, there are nonetheless three main children's channel categories that stand out when we look at demographics. These three clusters can roughly be defined as covering a mainstream, a preschool, and a teen market, segment.

Each group has at least one dedicated brand addressing a broad children and youngsters segment, and at least one more brand addressing pre-schoolers. The generalist children's channel addressing boys and girls within an extended range of two to 14 years old is usually the flagship brand of the US group, for example Disney Channel, Cartoon Network, Nickelodeon and Minimax. Of course, some channels are more skewed to children, and others to pre-teens. Even if their core target range is much smaller, they complement it through special programming blocks dedicated to addressing pre-schoolers and pre-teens.

Apart from these flagship channels, but still within this mainstream cluster, the groups also appear to value having a skewed-to-boys brand focused on action, sports and adventure, such as Disney XD, Toonami, Nicktoons and Megamax.

Figure 54. Walt Disney, Time Warner, Viacom and AMC children's TV portfolio mapping



Source: European Audiovisual Observatory / MAVISE database

Disney Cinema Channels promote and premier Walt Disney productions, Boomerang is the home library of Hanna-Barbera collections, while Nick Music leverages the music experience and exploits the shared videos collection of MTV on the children scene.

Besides the mainstream cluster, each US group appears to hold a children asset in the form of a standalone channel targeting the pre-school segment even if, as explained before, in some countries pre-school programming blocks are also included in the flagship children's channel schedule. Disney Junior, Nick Jr., Cartoonito, Canal Panda and JimJam represent such channels.

Even if a number of mainstream children's channels also address pre-teens and even teenagers, TeenNick is the only channel conceived specifically to address this target.

Among these three main children's TV channel clusters are also brands that were created for - and launched directly in - Europe, such as Disney Cinema Channels, Cartoonito, Boing, Nick Music, Nick Jr. Too, Minimax, Megamax, Canal Panda, Biggs and JimJam. AMC stands out due to its fully European-originated portfolio.

From the content type point of view, children's channels can favour more or less animation or live-action programming. As can be seen in the figure above, this tends to be related on the one hand to the production stronghold or backlog of the group and on the other hand to the age group targeted by the specific channel. For example, Time Warner's overall children's portfolio is more skewed to animation compared to the other groups, and pre-school channels are almost entirely animation-based compared to mainstream or teen channels.

Sources

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