



Mediametrie



Glance

Global Audience &
Content Evolution

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2023: Animation dominates among children



During the first half of 2023, children's blocks on generalist channels have progressed, and animated series have maintained their strong positions. In terms of contents, trends evolve around creativity and learning, involvement in the community and a more sophisticated content for tweens

Médiamétrie's international department Glance analyses the kids' shows market at MIPJunior and reveals global content trends.

Animation is key on children's programmes

In 2023, animated series consolidate their leading position: they represent **77%** of the top programmes over the five countries studied (**+5 points** vs. the first half of 2022), notably thanks to their significant increase in Spain. Only the United Kingdom saw a drop in animated series, in response to its entertainment programmes' increase. Meanwhile, in the first half of 2023, entertainment programmes slightly raised their share compared to the best-performing children's content a year before, ranking now as the second most popular genre after animation (vs. 4th genre in the first half of 2022). In France, **Frogger** and **Lego Masters** stood out, while **Oti's Boogie Beebies**, **Gigglequiz**, and **Justin's House** were successful in the UK among children's demos.

Over January-June 2023, **28** new shows (-2 shows vs. the first half of 2022) appeared in the national tops 20 and tops 3 by channel rankings of best performing children programmes, across the five studied countries. Spain asserts its leading position with a total of **11** launches, partly thanks to its main channel Clan. It is followed by France and Italy with respectively **7** and **6** shows launched. Animation accounted for **20** of the **28** launches. In Italy, Spain and France, content about little monsters was a common theme: for example, **Momonsters** on Rai Yoyo, **Monster High** on Nickelodeon and **Trollstopia** on Boomerang.

There is a relative stability on the top **10** programmes in all **5** countries. However, *Grizzy and the Lemmings* enters this top ranking for the 1st time at 9th place. Also, **Bluey** was for the first time the most watched show in the first half of 2023, totalling **46.8** million viewed hours among the children audience, based on linear channels only. **Bluey** is broadcast on both linear channels and Disney+, with complementary viewing patterns. In the UK, for example, **Bluey** reaches an average of **1.5 times** more children aged between 4 and 9 each month on Cbeebies than on Disney+. However, in terms of viewed hours, children spend **1.7 times** more on Disney+ than on Cbeebies.



In 2023, there is an increase of children's blocks on generalist channels compared to children's channels.

On those channels, several kids' block such as Okoo on France 5, Latte+Cartoni on Italia 1 and the CITV block on ITV1 are achieving significant growth.

“ Kids blocks on generalist channels have well performed and linear TV for kids are a good flagship for the shows, completed by the digital offers. Channels adapt their linear and digital strategies according to the countries. ”

Candice Alessandra, Client & Research Manager at Glance

Trends: creativity and learning, involvement in the community and a more sophisticated content for tweens

In terms of contents, Glance has highlighted 3 major areas into, across and beyond the “kids-verse”.

Creativity and learning is a strong dimension around which programmes have developed. Titles illustrating this category included **Get Set Galactic**, **Lyla in the loop** and **Wildlifers**. Launched on Cbeebies, **Get Set Galactic** is a science-themed game show set on board the Space Technology & Research Station. **Get set Galactic** ranked 5th best show for children aged 4 to 15 in the UK and was the best launch.

Lyla in the loop follows Lyla, a 7-year-old girl, who lives in a big city. With her family and community, they address with creativity and thinking a range of everyday problems. The US animated series is set to debut on February 5, 2024 on PBS.

The live action series **Wildlifers** features a duo of aspiring young documentary filmmakers as they ponder life, the universe, and nature. On air since May on the Australian public channel ABC ME, it multiplied by almost 2 the audience share of the afternoon slot among the 5 to 12 kids.

Helping to protect the community and trying to fit in marks another popular trend with series like **Mystery Lane**, **Kiya and the Kimoja Heroes** and **Kids on the Block**.

Mystery Lane, set in London, is a “Sherlock Homes” kind series. A pair of hamsters solves mysteries thanks to the observation and deduction skills of Clever, and the imagination of her brother. Produced by French studio Hari, the series was launched this year in several countries.

Kids on the block follows a band of friends who have everything under control in their neighbourhood square until a new family moves in. Together they will have to find a new balance. This live action increased the channel slot average by 38% compared to Ketnet's average.

Also illustrating this trend is **Kiya and the Kimoja Heroes**, an animated adventure series. The series explores the life of Kiya, a young African girl passionate about dancing and martial arts who also develops superhuman abilities. Coproduced between Triggerfish, Walt Disney EMEA and Frog Box, the series premiered on Disney Junior and Disney+ in March 2023. In South Africa the series started in September and ranks first during its first two weeks of broadcast.



The third trend is about offering tweens more sophisticated scripted series. One of the shows representing this trend is **Husky**. This Norwegian thriller series unfolds on the Husky Adventure farm in Karasjok. Twelve-year-old Elle and her mother Line's life is turned upside down when a group of brutal dog smugglers steal almost all the dogs. The first two episodes premiered at TIFF Junior in Norway in September this year.

Another example of this trend is **DreaMars**, an eight-part series taking place in 2045 where eight teenagers fly to Mars to prepare for settlement on the Red Planet. The series follow two timelines: the preparation of the mission on Earth, and from the emergency landing in the wrong and dangerous area of Mars. A co-production between Israel and Germany, the show aired on Israeli network HOT's kids channel Zoom in May and will broadcast on KiKA in Germany.

About the Kids TV Report

Twice a year, **the Kids TV Report offers a comprehensive view of the whole European audiovisual sector dedicated to young audiences**. It combines both an overview of each market, as well as detailed channel-by-channel analysis.

This report studies the **5 major European countries** (France, Germany, Italy, Spain, United Kingdom). More than 20 additional territories can be studied on request.

About Glance

Part of Médiamétrie, Glance is the specialist of international TV markets and leading provider of official TV ratings for over 7000 channels in more than 120 territories and insight analyses based on a global expertise. Glance tracks the latest TV and online contents and trends in nearly 50 territories. With more than 230 flagship clients, Glance is market leader in TV and video market intelligence

More information: www.glance-mediаметrie.com [X@Glance](https://twitter.com/Glance)

About Médiamétrie, a trusted third party for fair and objective measurements

Médiamétrie is committed to providing its customers with joint and sovereign standard audience measurements. As a data leader and media expert, the company applies its know-how to video, audio and cross-media behaviour measurements, as well as advertising effectiveness measurement. Every day, some 1,000 employees design and produce the right measure for today and tomorrow to support the free decision-making of the company's customers in France and abroad. In 2021, the Médiamétrie Group achieved a turnover of €105.1 million and processed over one billion data every day.

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